

# Regional Tourism Satellite Account Gujrat, 2009–10

Study Commissioned by the  
Ministry of Tourism, Government of India

October	2014
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*Prepared by :*

**NATIONAL COUNCIL OF APPLIED ECONOMIC RESEARCH**

Parisila Bhawan 11 Indraprastha Estate New Delhi 110 002 India

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**National Council of Applied Economic Research**

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## PREFACE

Tourism is as important an economic activity at sub-national level as it is at national level. In a diverse country like India, it is worthwhile assessing the extent of tourism within each state through the compilation of State Tourism Satellite Account (TSA). The scope of State TSAs goes beyond that of a national TSA as it provides the direct and indirect contribution of tourism to the state GDP and employment using state-specific demand and supply-side data.

NCAER, the National Council of Applied Economic Research, was commissioned by the Ministry of Tourism in the Government of India in 2013 to compile the Regional Tourism Satellite Accounts for all the states and UTs of India for the year 2009–10. NCAER had earlier successfully compiled both the first and second TSA for India. NCAER was requested to supplement the second national TSA for 2009-10 with state accounts in order to have a more complete understanding of the tourism sector. The present report is a part of 3-year integrated plan to prepare the regional Tourism Satellite Accounts for all the states and UTs of India.

Across the globe, TSAs at the sub-national level are increasingly becoming necessary. According to the United Nations World Tourism Organization (UNWTO), there are various reasons for encouraging countries to develop sub-national or regional TSAs. One of the main reasons is a worldwide trend towards a decentralization of political power and decentralized management of national resources in federal states, regions and municipalities. In order to allocate and monitor these resources effectively, more and better integrated regional and local information are required. Also, the unequal geographical distribution and characteristics of tourism activity within a national territory, from the standpoint of both demand and supply, lead to additional requirements for tourism statistics at various territorial levels. Besides, there is a great necessity for improving the allocation of resources in national and local economies, which can only be achieved by upgrading data and measuring economic impact.

In the absence of standard international guidelines to prepare sub-national TSAs, NCAER has compiled the state TSAs along the same lines as national the TSA, despite several data limitations. These limitations have been overcome by using the most logical rates and ratios based on reasonable assumptions.

I would like to thank the agencies that provided the underlying data for the TSA 2009-10, especially the National Sample Survey Office, the Indian Statistical Institute, and Central Statistical Office (CSO). NCAER is particularly grateful to

several Ministry of Tourism officials, Shri R.K. Bhatnagar, Additional Director-General, Mr Shailesh Kumar, Deputy Director, Smt. Mini Prasanna Kumar, Joint Director and Shri S.K. Mohanta, Data Processing Assistant – Grade B for their valuable inputs and administrative support during the preparation of the state TSAs.

In ending, I'd like to thank the team members Shri Ramesh Kolli, Senior Advisor; Dr Poonam Munjal, Team Leader, Ms. Rachna Sharma, Associate Fellow, Shri Amit Sharma, Research Analyst, Ms. Monisha Grover, Consultant, and Shri Pravin Kumar, Research Associate who all worked tirelessly to produce India's first State Tourism Satellite Accounts.

**New Delhi**  
October 30<sup>th</sup>, 2014

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## ABBREVIATIONS AND ACRONYMS

### *Units used in the Report*

1 crore = 10 million

1 lakh = 100 thousand

### *Abbreviations*

<b>CES</b>	Consumer Expenditure Survey
<b>CFC</b>	Consumption of Fixed Capital
<b>CIF/cif</b>	Cost, insurance and freight (valuation of imports)
<b>COE/CoE</b>	Compensation of Employees
<b>COICOP</b>	Classification of Individual Consumption According to Purpose
<b>CPC</b>	Central Product Classification (United Nations)
<b>CSO</b>	Central Statistical Office
<b>DTS</b>	Domestic Tourism Survey
<b>Eurostat</b>	Statistical Office of the European Union
<b>EUS</b>	Employment and Unemployment Survey
<b>FISIM</b>	Financial Intermediation Services Indirectly Measured
<b>GCE/GFCE</b>	Government Final Consumption Expenditure
<b>GDP</b>	Gross Domestic Product
<b>GO</b>	Gross output
<b>GVA</b>	Gross Value Added
<b>GVATI</b>	Gross Value Added of Tourism Industries
<b>HCE</b>	Household consumer expenditure
<b>IC</b>	Intermediate consumption
<b>IC - PP</b>	Intermediate consumption at purchasers' price
<b>IMF</b>	International Monetary Fund
<b>IPS</b>	International Passenger Survey
<b>IRTS</b>	International Recommendations on Tourism Statistics
<b>ISI</b>	Indian Statistical Institute
<b>ISIC</b>	International Standard Industrial Classification (United Nations)
<b>ISWGNA</b>	Inter-secretariat Working Group on National Accounts

**Abbreviations**

<b>MI</b>	Mixed Income
<b>MRP</b>	Mixed reference period
<b>MNREGA</b>	Mahatma Gandhi National Rural Employment Guarantee Act
<b>MPCE</b>	Monthly per capita consumer expenditure
<b>NAS</b>	National Accounts Statistics (of India)
<b>NCAER</b>	National Council of Applied Economic Research
<b>NIT</b>	Net Indirect tax
<b>NPISH</b>	Non Profit Institutions Serving Households
<b>NRI</b>	Non-Resident Indian
<b>NSO</b>	National Statistical Office
<b>NSSO</b>	National Sample Survey Office
<b>OECD</b>	Organisation for Economic Cooperation and Development
<b>OS</b>	Operating Surplus
<b>OS/MI</b>	Operating Surplus/Mixed Income
<b>PFCE</b>	Private Final Consumption Expenditure
<b>PP</b>	Purchasers price
<b>PIO</b>	People of Indian Origin
<b>RMF</b>	Recommended Methodological Framework
<b>Rs.</b>	Indian Rupees
<b>SNA</b>	System of National Accounts
<b>SUT</b>	Supply and Use Tables
<b>TDGDP</b>	Tourism Direct Gross Domestic Product
<b>TDGVA</b>	Tourism Direct Gross Value Added
<b>TSA</b>	Tourism Satellite Account
<b>TSA:RMF</b>	Tourism Satellite Account: Recommended Methodological Framework
<b>TTM</b>	Trade and transport margins
<b>UN</b>	United Nations
<b>UNSC</b>	United Nations Statistical Commission
<b>UNWTO</b>	United Nations World Tourism Organisation
<b>VAT</b>	Value Added Tax
<b>WTO</b>	World Tourism Organisation

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## 1. INTRODUCTION

### About tourism

1.1. Tourism is a social, cultural and economic phenomenon related to the movement of people to places outside their usual place of residence, pleasure being the usual motivation<sup>1</sup>. From this definition and the fact that tourism is a temporary activity, it can be interpreted that tourism is a demand based concept.

1.2. The decision of the tourist to make a visit generates additional demand for goods and services, which are provided from the supply side either through increased domestic production or through imports. Therefore, tourism, though a demand-based concept, can also be viewed from the supply side.

### Some definitions of Tourism

1.3. These two aspects of tourism give rise to a number of alternate definitions of tourism, though they all can be understood similarly in the context of tourism. Some of the definitions available in the public domain are:

- Tourism arises from a movement of people to, and their stay in, various destinations.
- Tourism is travel for recreational, leisure or business purposes.
- The temporary movement of people to destinations outside their normal places of work and residence, the activities undertaken during their stay in those destinations, and the facilities created to cater to their needs<sup>2</sup>.
- The sum of the phenomena and relationships arising from the interaction of tourists, business suppliers, host governments and host communities in the process of attracting and hosting these tourists and other visitors<sup>3</sup>.
- Tourism is a collection of activities, services and industries that delivers a travel experience, including transportation, accommodations, eating and drinking establishments, retail shops, entertainment businesses, activity facilities and other hospitality services provided for individuals or groups travelling away from home.
- Tourism can be understood as the set of productive activities that cater mainly to visitors.

<sup>1</sup>United Nations World Tourism Organisation (UNWTO): International Recommendations for Tourism Statistics (IRTS), 2008 (para 1.1)

<sup>2</sup>Mathieson, Alister, Wall, Geoffrey (1982) :Tourism: Economic, physical, and social impacts, Longman (London and New York)

<sup>3</sup>McIntosh, Robert W., Goeldner, Charles R. (1986): Tourism: Principles, practices, philosophies; Wiley (New York)

*UNWTO  
Definition*

1.4. The UN World Tourism Organization (UNWTO) provides the following definition of tourism which is now the accepted official definition of Tourism.

*“Tourism refers to the activity of visitors. A visitor is a traveller taking a trip to a main destination outside his/her usual environment for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited<sup>4</sup>.”*

**Tourism -  
World**

1.5. Tourism is one of the largest and fastest growing economic sectors in the world, thanks to increase in tourism destinations in tandem with an increase in awareness among people. Unlike a rather conservative tourism activity in the past, particularly in developing countries like India, now people are willing to travel more and even cross boundaries to visit far-away and sometimes remote destinations.

*International  
Tourist  
arrivals hit 1  
billion mark in  
2012*

1.6. According to the UNWTO, despite occasional shocks, worldwide international tourist arrivals have shown virtually uninterrupted growth from 25 million in 1950 to 278 million in 1980 to 528 million in 1995 and breached 1 billion mark, at 1,035 million, in 2012. This is supplemented with an estimate of 5 to 6 billion domestic tourism, making tourism a phenomenal economic activity. Going forward, the international tourist arrivals are expected to reach 1.8 billion by 2030, with the expected growth of 3.3 per cent a year.

1.7. For many countries, Tourism is an important social and economic phenomenon being a key driver of socio-economic progress through the creation of jobs and enterprises, infrastructure development and the export revenues earned<sup>5</sup>. As an internationally traded service, inbound tourism is one of the world's major trade categories. According to the latest data from UNWTO, international tourism receipts amounted to an estimated US\$ 1,075 billion worldwide in 2012, up by 4 per cent in real terms (adjusted for exchange rate fluctuations and inflation). This is despite the economic volatility across the globe.

1.8. It must be noted that for the destination countries, export revenue earned through international tourism receipts covers transactions generated by same-day as well as overnight visitors (these come under travel item in the Balance of Payments). However, these do not include receipts from international passenger transport contracted from companies outside the

<sup>4</sup>UNWTO: IRTS 2008, para 2.9

<sup>5</sup>Government of India: Report of the Working Group on Tourism, 12<sup>th</sup> Five Year Plan (2012-2017)

travellers' countries of residence, which are reported in a separate category (International Passenger Transport). This export value of international passenger transport is estimated at US\$ 213 billion in 2012. Hence, total receipts from international tourism, including international passenger transport, reached US\$ 1.3 trillion in 2012. In other words, international tourism contributes US\$ 3.5 billion a day to global export earnings. This is approximately 6 per cent of the world's exports.

1.9. According to UNWTO-Tourism Highlights, tourism's total contribution (direct, indirect and induced) to worldwide gross domestic product (GDP) is estimated at 9 per cent for 2012.

### Tourism- India

1.10. Compared to many countries, India has the advantages of possessing a rich and diverse range of unique tangible and intangible cultural, natural and man-made tourism resources, many of which are world class in quality. India's great competitive strength from tourism point of view is its ancient and yet living civilization that gave rise to four of the world's great religions and philosophies, and brought travelers and trade millennia ago. The rich natural and rural landscape of India is punctuated with the built heritage of its ancient past and modern structures. India's contacts with other civilisations is reflected in the rich cultural diversity of its people through its languages, cuisine, traditions, customs, music, dance, religions practices and festivals, its holistic healing traditions, art and craft.<sup>6</sup>

1.11. According to the latest data compiled by the Ministry of Tourism, number of international tourist arrivals in India was 6.58 million in 2012, posting an annual growth of 4.3 per cent, higher than the world growth. Domestic tourism, which accounts for a bulk of tourism in India, grew by 19.9 per cent with total domestic tourists visiting all states and UTs of India numbered at 1036 million. India's foreign exchange earnings from tourism stood at US\$ 17.74 billion in 2012, growing by 7.1 per cent. This places India at 41<sup>st</sup> rank in terms of its share in world tourist arrivals and at 16<sup>th</sup> position in terms of its share in world tourism receipts.

1.12. With respect to the contribution of tourism to the GDP of India, the second Tourism Satellite Account of 2009-10 estimates it at 3.7 per cent as the direct share and 6.8 per cent, taking indirect impact also into account. This brings tourism to one of the top sectors of Indian economy in terms of contribution to economy. Tourism sector contributes significantly to the creation of jobs as well. It is estimated to have created 23.4 million jobs in 2009-10, which translated to a share of 4.4 per cent in the total employment.

*Tourism  
contributes 6.8  
per cent to  
GDP and 10.2  
per cent to*

<sup>6</sup>National Tourism Policy, 2002, Department of Tourism

*employment of India in 2009-10.*

This sector also contributed 54.5 million jobs indirectly, which increased its share to 10.2 per cent. Within the non-agriculture employment, tourism had a share of 9.7 per cent in employment and if indirect share is included, the share goes up to 22.6 per cent. This implies that almost every 4th to 5th person employed in non-agricultural activities is directly or indirectly engaged in tourism activities.

1.13. An exercise to update these numbers on annual basis till the release of third Tourism Satellite Account<sup>7</sup> reveals that the share of tourism in GDP moderated to 3.6 per cent in 2010-11 due to the overall slowdown in general economy but recuperated in the following year and contributed 3.7 per cent to GDP in 2011-12. Accordingly the total (direct and indirect) share fell from 6.77 per cent in 2009-10 to 6.68 per cent in 2010-11 but upped at 6.74 per cent in 2011-12.

1.14. The share of Tourism industries' employment in total employment grew from 4.4 per cent in 2009-10 (according to Second TSA) to 4.6 per cent in 2010-11 and to 4.9 per cent in 2011-12<sup>8</sup>. Its direct and indirect share escalated from 10.2 per cent in 2009-10 to 10.8 per cent in 2010-11 and settled at 11.5 per cent in 2011-12.

**Tourism – Gujarat**

1.15. Gujarat is one of the major tourism-oriented states of India. In terms of number of domestic tourist arrival in 2010, the state ranks at the tenth place and the rank in terms of foreign tourist arrival is 15. Eight major tourism hubs have been developed in Gujarat namely Ahmedabad Metro, Ahmedabad Rural, Surat, Vadodara, Rajkot, Junagarh & Jamnagar (Saurashtra) and Bhuj (Kutch).

1.16. Gujarat is well known place for pilgrimage places. Swaminarayan and Akshardham temples in Ahmedabad, Dwarkadhish and ISKON temples in Dwarka, Somnath Temple in Saurashtra, Shankheshwar Jain temples and Girnar Hill temple are some of the most famous and religiously followed places located in Gujarat. All these places attract high number of pilgrims to Gujarat.

1.17. Gujarat, especially Ahmedabad and nearby region including the state capital Gandhinagar is a major hub of internationally renowned educational institutions which attract education tourists of higher education from each corner of the country. These prestigious institutes include Indian Institute of Management and National Institute of Design in Ahmedabad, National Institute of Fashion Technology and Indian Institute of Technology in Gandhinagar and

<sup>7</sup> This exercise is based on the data obtained from the latest National Accounts Statistics, 2013

<sup>8</sup> The employment numbers for 2011-12 were obtained from the latest NSSO survey on Employment and Unemployment of India, 68th Round. The employment for 2010-11 was obtained by interpolating the numbers of 2009-10 and 2010-11.

Institute of Rural Management in Anand. All these institutions including the famous Indian Space Research Organisation (ISRO) located in Ahmedabad attract many tourists travelling with purposes of attending meetings & seminars and education & training.

1.18. Gujarat is renowned for its beaches, historic architectural assets, wildlife sanctuaries and hill resorts which are major attraction for leisure tourists.

1.19. According to the data compiled by the India Tourism Statistics, the total domestic tourist arrivals in the state rose from 82.7 lakh in 2001 to 2.74 crore in 2010, marking the compounded annual growth rate of 10.5 per cent.

1.20. During the same period, foreign tourist arrival grew by five times, from 30,930 to 1,98,773 with the compounded annual growth rate (CAGR) of 16.8 per cent.

#### Measurement of tourism

1.21. Tourism primarily relates to movement of people to places outside their usual place of residence, pleasure being the usual motivation. It induces economic activity either directly or indirectly, sometimes in places beyond those visited. This could be in terms of economic output or in terms of employment, besides other social and infrastructural dimensions. Therefore, for a holistic approach to tourism development, it is necessary that reliable statistics on tourism sector and analysis based on tourism statistics are available to the policymakers for decision making.

1.22. The UNWTO lays down standard international guidelines for the collection, compilation and dissemination of statistics on tourism by the member countries. The latest publication, International Recommendations for Tourism Statistics 2008 (IRTS, 2008) provides a common reference framework for countries to use in the compilation of tourism statistics. The IRTS, 2008 presents a system of definitions, concepts, classifications and indicators that are internally consistent and that facilitate the link to the conceptual frameworks of the Tourism Satellite Account, national accounts, balance of payments and labour statistics, among others and further provides general guidance with respect to data sources and data compilation methods. This ensures international comparability of tourism statistics and enhances coherence of tourism statistics with other official statistics and further development of tourism satellite accounts.

1.23. However, as already mentioned, tourism is not defined separately in either the standard international industry or product classifications<sup>9</sup> or in the accounting framework of national accounts, which focuses on accounting of economic activities undertaken in the country according to standard international classifications. This is because tourism, unlike other sectors of the SNA, is not defined as an industry by the characteristic of the product it makes as an output. It is identified rather by the characteristic of the purchaser demanding the products, that is, a visitor.

1.24. This means the tourism industry is defined according to the status of the consumer, not according to the status of producer. Therefore, this special characteristic of tourism sector cannot be made explicit while compiling the national accounts according to System of National Accounts (SNA)<sup>10</sup>, though tourism is an economic activity and its contribution is already included in the national accounts implicitly and thus is not separately visible in the national accounts.

1.25. In the context of national accounts, tourism remains difficult to define and measure. Therefore, there is little room for organising data into a structure that permits examination and analysis by function. In such cases, where SNA core accounts do not provide the required information, the SNA suggests the development of satellite accounts within the framework, concepts and definitions of SNA. These satellite accounts draw from the core accounts in concept, framework and data but are recast to highlight the particular aspect of the economy that is inadequately described.

1.26. Tourism has several dimensions and all of these are important in the context of compiling statistics on tourism. These dimensions are as follows:

- (i) motivation for traveling – purpose of trip;
- (ii) facilities, that include hotels and restaurants, support services and infrastructure facilities;
- (iii) transportation and finances, such as air, road and water transportation, availability of finances to incur travel expenditures;

hospitality – interaction of tourists with local population.

<sup>9</sup>These are respectively the International Standard Industrial Classification of All Economic Activities, Revision 3 (ISIC rev 3) and the Central Classification of Products, Revision 1 (CPC rev 1). Both are published and maintained by the United Nations Statistics Division, New York. The website <http://unstats.un.org/unsd> contains a detailed registry of these and other United Nations Classifications.

<sup>10</sup>A System of National Accounts 1993 and 2008. Both are prepared and published under the auspices of the Inter-secretariat Working Group on National Accounts (ISWGNA), which is an interagency body set up by the United Nations Statistical Commission (UNSC) on national accounts and consists of European Commission (EU), International Monetary Fund (IMF), Organization for Economic Co-operation and Development (OECD), United Nations (UN) and World Bank.

*Satellite  
Accounts*

1.27. The SNA provides flexibility for elaborations, extensions and alternative concepts, while still remaining within the conceptual framework of SNA. Satellite accounts compilations are one such extension. The idea behind compilation of such accounts is to allow certain types of analysis that focus on a certain field or aspects of economic and social life. Such detailed analysis is usually not available in the central framework. Therefore, the satellite accounts are distinct from the central system.

1.28. The satellite accounts maintain a loose relationship with the SNA, with boundaries expanded and reclassified and focus on the purpose or function of transactions. Thus, transactions are first analysed in the system of national accounts according to their characteristics, then certain types of transactions (such as tourism, or health care, or environment, etc.) are analysed from the expenditure side. In satellite accounts, therefore, the unit of analysis to which classification is applied is not an establishment (as in national accounts) but, instead, is transactions, or groups of transactions.

*Tourism  
Satellite  
Account*

1.29. The Tourism Satellite Account (TSA) is an accounting procedure designed to measure goods and services associated with tourism, according to internationally agreed standards, concepts, classifications and definitions. It helps in assessing the size and contribution of tourism to the economy. Essentially, the TSA uses the macro-economic framework of the System of National Accounts, 1993<sup>11</sup> (1993 SNA) for integrating tourism statistics and for showing the linkages between demand and supply for goods and services in respect of Tourism.

1.30. In TSA, the national accounts framework and methodology is applied to tourism so that the industries supplying tourism output are identified in the production account, while at the same time showing the visitors' expenditures identified by functions, which is the determining characteristic of tourism, on the expenditure account. The national account framework further allows confrontation of these two dimensions through the supply and use tables for arriving at a consistent set of economic data.

1.31. The TSA provides a framework for policy analysis of issues related to tourism economics as well as for model building, tourism growth analysis and productivity measurement. The systems of tourism statistics and tourism satellite accounts are tools by which the role of tourism in the economy can be better understood and more accurately measured<sup>12</sup>. The TSA focuses on the

<sup>11</sup> United Nations, World Bank, International Monetary Fund, Commission of the European Communities and Organisation for Economic Cooperation and Development, 1993. System of National Accounts 1993. New York, Washington, D.C., Brussels and Paris

<sup>12</sup> Eurostat: European Implementation Manual on TSA

economic dimension of tourism trips<sup>13</sup>, mostly through expenditure by visitors or by others for their benefit.

1.32. It provides the mechanism for transforming demand based concept of tourism into a methodology for identifying who produces what for the visitor. It identifies the typical tourism industries, i.e. those industries that produce commodities which represent a significant part of tourism demand and whose existence is very strongly dependent on tourism demand or would be seriously affected were tourism to cease. For this set of industries, the TSA measures the value added, employment, capital formation, etc., flowing from that demand and identifies who the visitors are.

1.33. The TSA framework provided by UNWTO is the most comprehensive way to measure the economic importance of tourism in national economies. According to TSA: RMF 2008, TSA comprises a set of tables and is mainly descriptive in nature. It provides accounts and tables and macroeconomic aggregates, principal among them being the gross value added of tourism industry (GVATI), tourism direct gross value added (TDGVA) and tourism direct gross domestic product (TDGDP). The TSA also has a scope to link economic data with the investment in tourism, employment in the tourism industry and other non-monetary (quantitative) information related to tourism and tourists concerning tourism statistics.

#### *Uses and Applications of TSA*

1.34. The important uses and applications of TSA are:

- Analyse tourism from an economic point of view.
- Provide a set of accounts that are internationally compatible, working within national accounting principles.
- Offer policy makers insights into tourism and its socio-economic functions and impacts (in current prices as well as in volume terms).
- Calculate tourism value added for a given list of industries in a coherent system.
- Provide information on the employment profiles of the tourism industries.
- Indicate the production functions of tourism industries and illustrate the interlink ages between the tourism industries and the rest of the economy.
- Offer a reference framework within which impact models and other analytical economic models of tourism can be calculated.

<sup>13</sup>IRTS 2008, para. 2.29

- Provide an indication of the size of tourism capital investment, and the means to analyse its link with tourism supply.
- Provide information on the industry's capital stock and capital base.

1.35. Regional TSAs or TSAs at sub-national level are increasingly becoming popular. According to TSA:RMF 2008, there are various reasons for encouraging discussion on how the Tourism Satellite Account can be adapted to sub-national levels. Some of these reasons are:

- There is a worldwide trend towards a certain degree of decentralization of political power and decentralized management of national resources in federal states, regions, municipalities, etc. In order to allocate and monitor these resources effectively, more and better integrated regional and local information are required.
- The tourism activities are multifaceted in nature and can potentially benefit rural areas that are seeking to diversify.
- The unequal geographical distribution and characteristics of tourism activity within the national territory, from the standpoint of both demand and supply, lead to additional requirements for tourism statistics at the various territorial levels.
- There is a growing interest of tourism-related businesses in learning about the interrelation of their activity with others and its main determinants and seasonal cycles.
- There is a great necessity of improving the allocation of resources in national and local economies, which can only be achieved by upgrading quantitative references and measuring economic impacts.

1.36. There are no standard international guidelines to prepare regional or sub-national TSAs. However, TSAs at regional level or state level do provide useful indicators for regional tourism enterprises and organisations in identifying possible business opportunities and for state government tourism departments to formulate relevant tourism policies.

1.37. Essentially, preparation of a state TSA requires the following.

- Statistics on expenditures made by visitors on different products within the state.
- Statistics on supplies from the domestic production and imports (which include from other states) to meet these purchases of tourists.
- Confrontation of the two sets of statistics in the national accounting

framework through the supply and use tables so that supplies from domestic production and imports match with the expenditures made by tourists.

- Estimate the value added out of the domestic production that is involved in supplying the products to tourists' purchases.

1.38. This procedure of compiling a state TSA places enormous demand on data and construction of SUTs at state level. In India, SUTs are compiled neither at the national level nor at the state level.

1.39. The second method, normally followed by a few countries which compile regional TSAs, is applying the tourism industry ratios from national TSA on the output of the respective industries in the state. Following this approach, NCAER compiled regional TSAs for the states of Kerala and Madhya Pradesh for the year 2009-10 in 2013 along with the TSA for India for the same year.

1.40. The TSAs, 2009-10 for Gujarat presented in this Report followed the guidelines provided in the TSA RMF: 2008 to the extent they are applicable at regional level and the report includes the first seven tables, and Table 10 on non-monetary indicators. In comparison to the all-India TSA tables, the state TSA tables do not include the supply table, as no information on imports to the state from other states or from abroad is available. The data sources mainly include (i) Domestic Passenger Survey, 2008-09 conducted by the National Sample Survey Office of the NSO, India, (ii) International Passenger Survey, 2009-10 conducted by the Indian Statistical Institute, India, (iii) State Accounts by State Department of Economics and Statistics, (iv) Employment and Unemployment Survey, 2009-10 conducted by NSSO, (v) Consumer Expenditure Survey, 2009-10, conducted by NSSO.

## Structure of the report

1.41. The present section on Introduction dealt with importance of tourism, problems in the measurement of economic aspects of tourism, the concept of satellite accounting in the framework of national accounts, tourism satellite accounts, its role and applications and regional tourism satellite accounts.

1.42. Section 2 presents a snapshot of the state of reference, which here is Gujarat. This chapter serves as a window to the state's geographical, demographic and economic profile, all of which, albeit partially, contribute to the extent of tourism activities in the state.

1.43. Section 3 talks briefly about the various data sources that were used in the preparation of the state TSA.

1.44. Section 4 provides the framework of the recommended TSA tables and tourism aggregates that have been included in this Report. The text for this

section is mainly drawn from IRTS, 2008 and TSA: RMF 2008.

1.45. Section 5 presents the TSA tables for the year 2009-10. This Section also includes the tourism aggregates that have been derived from the TSA tables.

1.46. Section 6 presents the key findings of TSA, 2009-10.

1.47. The Glossary includes the conceptual issues and operational definitions of tourism, its types, forms, dimensions and related issues.

1.48. Estimation Procedure section provides insights on procedure followed to estimate number of trips, by different categories such as main destination, purpose of trips, mode of travel etc., undertaken during last 365 days from DTS micro-data. This information is provided only for last 30 days in the data.



## 2. PROFILE OF THE STATE

### Geographic profile

2.1. Gujarat is the seventh largest state with 196204 sq. km area covering for 6 per cent of the total geographical area, located on the North west coast of the country is known for its incredible diversity due to its geographic and strategic location. Gujarat borders with Rajasthan to the Northeast, Maharashtra and Union Territories of Daman & Diu and Dadra & Nagar Haveli to the south, Madhya Pradesh to the east, and 1600 km long coastline along the Arabian Sea to the southwest and the Pakistani province of Sindh on the Northwest.

2.2. The strategic location on the West Coast of India, the longest coastline 1600 km with nearly 41 ports (one major, 11 intermediate and 29 minor ports), Gujarat is also known as the Gateway to the rich land-locked Northern and Central vicinity of the country.

2.3. Gujarat is blessed by some of the great rivers, Sabarmati; the biggest river of Gujarat followed by Tapi and Narmada. Narmada River is the third longest river that flows entirely within India. There are almost thirty five more rivers flowing in Gujarat.

2.4. Gujarat has interesting area; Rann of Kutch, where there is desert on one side and the sea on the other. Rann of Kutch is a seasonally marshy saline clay desert located in the Thar Desert bio-geographic area spreading across the Sindh province in Pakistan. The marsh covers a huge area of around 10,000 square miles and is positioned between the Gulf of Kutch and the mouth of the Indus River in southern Pakistan. To the northeast corner of the Rann of Kutch lies Luni River, originating in Rajasthan. The state experiences diverse climate conditions, the winters are mild, pleasant, and dry with sunny days and clear nights and the summers are extremely hot and dry. Mostly dry in the north-west regions and, and wet in the southern districts due to heavy monsoon season.

2.5. With very clear geographical location, diverse climatic conditions and cultural diversity, Gujarat is divided into four divisions, North Gujarat, South Gujarat, Central Gujarat and Saurashtra & Kutch. North Gujarat which covers the districts of Gandhinagar, Banaskantha, Sabarkantha, Mehsana and Patan districts, is dominant in the Dairy Industry.

2.6. The South Gujarat formed by Surat, Navsari, The Dang, Valsad and a

newly formed Tapi districts, is also known as Deccan Gujarat or Dakshin Gujarat and is one of the wettest region of India. The western region of this division is the coastal region and the eastern parts are mostly the hilly parts with the Saputara range in the Dangs District.

2.7. The geographical centre of Gujarat with 8 districts (Ahmedabad, Vadodara, Anand (called Charotar), kheda (called Charotar), Panchmahal, Dahod, Narmada and Bharuch) form the third division called Central Gujarat.

2.8. The fourth division is Saurashtra & Kachchh is the western region located on the Arabian Seacoast of Gujarat state consisting of 8 districts (Surendranagar, Rajkot, Jamnagar, Porbandar, Junagadh, Amreli, Bhavnagar and Kachchh).

### Climate profile

2.9. The overall climate in Gujarat is pleasant except for summers as they become harsher. The northern and northern-western region of the state receive scanty rainfall is far drier than the southern region which receives heavy rainfall (approximately 80 inches during the season). The central region of the Kathiawar Peninsula as well as in the North-Eastern region, receives moderate rainfall (approximately 40 inches during the season)

### Historical background

2.10. The existence of Gujarat is believed to be at least 2000 years old, the proofs of which can be seen in the oldest written records documented in a Greek Book named 'The Periplus of the Erythraean Sea: Travel and Trade in the Indian Ocean by a Merchant of the First Century'. Historically, the north was known as Anarta, the Kathiawar peninsula, "Saurashtra", and the south as "Lata". Gujarat was also known as Pratichya and Varuna.

2.11. The State took its name from the *Gujara*, the land of the *Gujjars*, who ruled the area during the 700's and 800's. The State took its name from the *Gujara*, the land of the ethnic group of *Gujjars*, who were the first settlers and rulers of the area during the 700's and 800's. The name of the tribe was 'sanskritized' to 'Gurjara' who followed the main religions of Hinduism, Islam, Sikkism and Christianity. However, the earliest Archaeological traces indicate the Indus Valley Civilization as historical relics with the Stone Age settlements are found in Gujarat around Sabarmati and Mahi rivers. Its roots are also in the Harappan traces found at Lothal, Dholavira, Rampur, Amri and other places. Lothal is believed to be one of the world's first seaports and Gujarat's coastal cities, chiefly Bharuch and Khambhat, served as ports and trading centers in the Maurya and Gupta empires. Emperor Chandragupta Maurya of the Maurya Dynasty conquered a number of states while his grandson, King Ashoka extended his domain in Gujarat. It was during the rule of Dhruvasena Maitrak that the great Chinese traveler and philosopher Huien

Tsang visited India in 640AD.

2.12. After the last Hindu rulers, Solanki clan of Rajputs were overthrown by Allauddin Khilji Delhi in 1297. The Muslim rule over the Sultanate of Gujarat continued for 400 years until the Mughal emperor Akbar conquered it and annexed it to the Mughal Empire. The Mughals ruled for about 2 centuries till the streak was terminated by the Marathas in the mid-18th century. Chhatrapati Shivaji, the great Maratha ruler conquered Gujarat with his military skill.

2.13. Later in 1600's, the Dutch, French, English and Portuguese – all established bases along the coast of the region acquiring several enclaves along the Gujarati coast, including Daman and Diu as well as Dadra and Nagar Haveli. The British East India Company established a factory in Surat in 1614, which formed their first base in India, the Company wrested control of much of Gujarat from the Marathas during the Second Anglo-Maratha War. Gujarat was placed under the political authority of the Bombay Presidency. From 1818 to 1947, most of present-day Gujarat, including Kathiawar, Kutch, and northern and eastern Gujarat were divided into dozens of princely states, but several districts in central and southern Gujarat, namely Ahmedabad, Broach (Bharuch), Kaira, Panch Mahals, and Surat, were ruled directly by British officials.

2.14. A new era began with the Independence movement through the some of the most popular revolts, including the Satyagrahas in Kheda, Bardoli, Borsad and the Salt Satyagraha. After the Independence, in 1948, a Mahagujarat movement took place to integrate the entire Gujarati speaking areas including Gujarat, Saurashtra and Kutchh under one administrative body and on May 1, 1960, the Bombay State split into the states of Maharashtra and Gujarat. For the first time after the Sultanate, Gujarat was once again autonomous.

### Demographic & social profile

2.15. The state of Gujarat is the 7th largest state occupying approximately 6 per cent of the total geographical area, of which 96 per cent is the rural area. The state is 10<sup>th</sup> most populated state with 60.4 million populations (4.99% of total population), 57.4 per cent of this population resides in rural and remaining in the urban areas. The urban Gujarat with approximately 43 per cent of the total state population but with marginal land area is almost twenty times more densely populated than the rural Gujarat. Following the national trend the rural Gujarat fares better than the urban areas in terms of sex ratio. Gujarat is predominantly a Hindu State with nearly 90 per cent of population, is also home to people following other religions. The average household size in both rural and urban parts of Gujarat is higher than the national level figures.

2.16. With very clear geographical location and cultural diversity, Gujarat is divided into four divisions, North Gujarat, South Gujarat, Central Gujarat and Saurashtra & Kutch. Saurashtra & Kutch the largest division covers nearly 56 per cent of the land area but houses only 29 per cent of the population as against the smallest division of South Gujarat covers 7.5 per cent of geographical area but a home to 16.8 per cent of the population, making it the most densely populated area among all the divisions.

2.17. Gujarat is well known for the educational institutes in the state and some of the districts are known for their pioneering and commendable efforts in the field of education of children's as well as women in the rural areas. The literacy levels in all the four divisions in the state have higher rates than the national levels, only exception is the female literacy rate in North Gujarat which is marginally lower than the national level literacy rate of 64.6 per cent. But it is heartening to know that the sex ratio in the state is 919 as compared to the all India figure of 943. The urban areas are worse off with sex ratio of 880 in comparison to 929 at All India level because of which the state ranks poorly at 26 out of 35 states and UTs.

Table 2.1: The Demographic and Social Profile of the State

		Year	North Gujarat	Central Gujarat	South Gujarat	Saurashtra & Kutch	Gujarat State
<b>Area (sq km)</b>			30470 (15.5%)	41009 (20.9%)	14708 (7.5%)	110057 (56.1%)	196244 (7 <sup>th</sup> Largest state in India)
<b>Households (in lakh)</b>		<b>2011</b>	20.2 (16.5%)	45.2 (36.9%)	22.1 (18.1%)	34.9 (28.5%)	189.14 (4.9% of Total households)
<b>Household Size</b>		<b>2011</b>	5.10	4.96	4.58	5.02	4.93
<b>Population (in lakhs &amp; %)</b>	<b>Total</b>	<b>2011</b>	103.2 (17.1%)	224.3 (37.1%)	101.5 (16.8%)	175.4 (29.0%)	604.4 (5% of Total population) (10 <sup>th</sup> Most Populated State)
	<b>Males</b>	<b>2011</b>	53.3 (16.9%)	116.2 (36.9%)	54.8 (17.4%)	90.6 (28.8%)	314.9 (5.05% of Total Male Popn.) (52.1% of State Population)
	<b>Females</b>	<b>2011</b>	49.9 (17.2%)	108.1 (37.4%)	46.7 (16.1%)	84.8 (29.3%)	289.5 (4.93% of Total Female Popn.) (47.9% of State Population)
	<b>Rural</b>	<b>2011</b>	81.4 (23.5%)	120.3 (34.7%)	41.5 (12.0%)	103.6 (29.9%)	346.9 (4.2% of Total Rural Popn.) (57.4% of State Population)
	<b>Urban</b>	<b>2011</b>	21.7 (8.4%)	104.0 (40.4%)	60.0 (23.3%)	71.7 (27.9%)	257.5 (6.8% of Total Urban Popn.) (42.63% of State Population)
<b>Percentage of population</b>	<b>Hindus</b>	<b>2001</b>					89.09
	<b>Muslims</b>	<b>2001</b>					9.06
	<b>Others</b>	<b>2001</b>					1.78

		Year	North Gujarat	Central Gujarat	South Gujarat	Saurashtra & Kutch	Gujarat State
Density (persons per sq.km.)	Total	2011	339	547	690	159	308
	Rural	2011	278	310	300	97	184
	Urban	2011	1907	4678	7036	2250	3477
No of Districts		2011	5	8	5	8	26
Literacy Rate		2011	75.0	79.3	82.5	75.5	78.0
Male Literacy rate		2011	85.3	86.8	87.5	83.6	85.8
Female Literacy rate		2011	64.1	71.3	76.7	66.9	69.7
Sex ratio		2011	936	931	851	935	919
Work Force (percentage)		2011	41.0	40.5	43.9	39.9	41.0
Dependency Ratio		2011	1.4	1.5	1.3	1.5	1.4

Source: Office of the Registrar General & Census Commissioner, India

## Society

2.18. History of Gujarat spread over centuries from the ancient Harappan Civilization to the Mughal period and its endless journey from Roots to Wings is timeless with historical and cultural traditions glorifying the State. Gujarat is incredible diverse state not only due to its geographic and strategic location but the diversity in culture and heritage, which is reflected in the arts, music, literature, religious traditions, cuisine, fairs and festivals of the state. The social life in Gujarat comprises various languages, customs, festivals, celebrations, costumes, food habits and dwellings of people living in the different regions. The geographical, social, religious and occupational diversity has helped Gujarat build on its cultural edifice. It is because of their humble, determined and hardworking nature that they have stretched out their economy and business ventures not only in Gujarat but all over India and the rest of the world.

2.19. Gujarat is home to people of different religions, Hinduism, Islam, Judaism, Jainism, Buddhism, Christianity and Zoroastrianism, making it a religiously diverse state. The Zoroastrians, also known in India as Parsi and Irani, are believed to have migrated to Gujarat to maintain their traditions and they played an instrumental role in economic development of not only Gujarat but India also with several of the best-known business conglomerates of India run by Parsi-Zoroastrians, including the Tata, Godrej, and Wadia families.

2.20. Mahatma Gandhi, Father of Nation who led the Indian independence movement against British colonial rule, Muhammad Ali Jinnah, honoured in Pakistan as Quaid-i-Azam (Great Leader), Baba-i-Qaum (Father of the Nation) and first Governor general of Pakistan was from a Gujarati Muslim family in Rajkot, . Sardar Vallabhbhai Patel or the "Iron Man of India", the first Deputy Prime Minister and the Home Minister of Independent India. These legendary freedom fighters along with Morarji Desai, K.M. Munshi, Narhari Parikh, Mahadev Desai, Mohanlal Pandya, Bhulabhai Desai and Ravi Shankar Vyas infused the qualities of tolerance, brotherhood, non-violence and patriotism into Indians. The commonality between all these freedom fighters was that they all hailed from Gujarat.

2.21. Some of the legends like Vikram Sarabhai, known as the "Father of the Indian Space Programme" originated from a family of Jain industrialists from Ahmedabad, the pioneer industrialist Jamsetji Tata regarded the legendary "Father of Indian Industry" founded the famous Tata Group, India's biggest and best-known multinational conglomerate, Dhirubhai Ambani, founder of Reliance industries, Azim Premji, software magnate and chairman of Wipro Limited all are originally from Gujarat. Sunita Williams, a former American astronaut who holds the records for longest single space

flight by a woman (195 days), total spacewalks by a woman (seven), and most spacewalk time for a woman (50 hours, 40 minutes) has her descendants in Gujarat. Gujarat has to its credit a number of Chief of all the three services and Judiciary.

2.22. Sohrab Modi an eminent and celebrate actor, director and producer of his times (1897–1984) and Zubin Mehta conductor of Western classical music both born in Mumbai belonged to the Indian Parsi families from Gujarat. Sanjeev Kumar, Bindu, Asha Parekh, Bhatts (Mahesh, Mukesh), Pathak (Dina, Supriya & Ratna) Boman Irani, Aruna Irani, Mallika Sarabhai, Asrani, Naresh Kanodia, Paresh Rawal, Neeraj Vora, Dilip Joshi, Ayesha Jhulka and Himesh Reshammiya are just a few names from a very long list of people from Gujarat in the field of entertainment. Gujarat has produced not only actors, directors, writers, singers, comedians, artists, music composers but some of best sports personalities not only for India but other countries also. The famous Mumbai theatre veteran, Alyque Padamsee, best known in the English-speaking world for playing Muhammad Ali Jinnah in Sir Richard Attenborough's Gandhi, was from a traditional Gujarati-Kutchi family from Kathiawar.

2.23. The history of Gujarati literature's traces back to 1000 AD and since then literature it has flourished till date. In Gujarat, Knowledge is Power. Literature is traced back to the bygone Sultanate era. Gujarati Literature stand as a mix of classics and contemporary Literature with its Prose, Poetry, Plays, Biography-Autobiographies, Fiction and non-fiction. More, the State is sound with many Literature writers and poets with contributions of multi-language Literature like English, Hindi and esp. Sanskrit Literature. Some of the well-known laureates of Gujarati literature are Hemchandracharya, Narsinh Mehta, Mirabai, Akho, Premanand Bhatt, Shamal Bhatt, Dayaram, Dalpatram, Narmad, Govardhanram Tripathi, Mahatma Gandhi, K. M. Munshi, Umashankar Joshi, Suresh Joshi, Pannalal Patel and Rajendra Shah. Kavi Kant, Zaverchand Meghani and Kalapi are famous Gujarati poets.

2.24. Saraswatichandra is a landmark novel by Govardhanram Tripathi. Writers like Kavi Nanalal, Sundaram, Aanand Shankar Dhruv, Khabardar, Balwantray Thakore, Suresh Dalal, Harindra Dave, Jyotindra Dave, Tarak Mehta, Harkisan Mehta, Chandrakant Bakshi, Ashvini Bhatt, Vinod Bhatt, Kanti Bhatt, Jay Vasavada, Makarand Dave, Gunvant Shah and Varsha Adalja have influenced the thinkers.

2.25. Makar Sankranti is a festival of kite flying where people from across the world come to participate in. Apart from Navratri and

Uttarayana, Diwali, Holi, Tazia and others are also celebrated.

2.26. Ensembles, lifestyles and ways of living vary all over Gujarat. The fairs and festivals are full of enthusiasm, entertainment and spirituality. Gujarat is known world over for its Navratri celebration which sees people immersed in the spirit of dance for nine nights. The dance forms depend on the unique styles that have emerged in different cities. People have adopted this traditional dance and its varied forms by the name of 'Garba' and 'Raas'. The music and dance blend the rich traditions with its folk music and dance. The Garba dance is the spiritual expression of Gujarat and the spirit of festivity of the traditional festival reaches worldwide. Music and folk dances have evolved since ancient times and continues to lure people to its rich tradition even today as it retain its original form or even blend to modern forms. Folk songs, classical music and array of distinctive classical ragas have exemplary features with distinctive music variations. Gujarat is known to have produced its own folk instruments besides the vast contributions to classical and folk music. Also modern culture of pop thrive its existence with the youth catching faster on western and other music forms pertaining to other countries.

2.27. Gujarat stand unique with Arts as a form of expression as it is a home to many world renowned Artists and flourishing talents shaping up the Art World. The State also has a fantastic pool of artists and a new breed of collectors and investors in the Art Talents.

2.28. Gujarat is a land of traditions, festivity spirit continues all-round the year as spirituality is in every breath of the Gujarati soul. Gujarat has fairs and festivals apart from many other rituals and traditions. Gujarat is also popular for the lifestyle and cuisines that go with the celebrations. Traditions almost remain unchanged and you get acquainted with the modern living as Gujarat develops on a faster growth to modernity, influenced by outside culture. Unmatched traditions in the world, it speaks of 'Home is where the heart is.' Gujarat is influenced with enculturation; a culture shared with members of the society and passed on from one generation to the next. Enculturation has unified people with common sense experience and influence that lead to knowledge and appreciation of cultural traditions and lifestyles.

2.29. Gujarat is the Land of the Legends – where individuals have peace of mind, are spiritual and live in harmony. The people are enterprising oriented, cooperative, and supportive. They possess warm and friendly nature with qualities of humanity, generous and loyal.

## Economic profile

“ Agriculture is locomotive of our economy and a prosperous rural economy based on agriculture will ultimately make the nation prosperous ”  
**Sardar Vallabhbhai Patel**

2.30. Gujarat is endowed with good natural resources which include minerals, marine, agriculture and livestock. The important minerals in the State include: limestone, coal, lignite, fire clay, dolomite, marbles, granite and oil and also the state is an important maritime State having suitability for Aquaculture.

## Agriculture sector

2.31. The Agriculture sector has its own growth story in the State. In the last decade the state has achieved many milestones which have never been envisaged in the past. The World's Largest Irrigation Network has been made possible by the Sardar Sarovar Dam on Narmada which also has immense contribution towards, hydropower and drinking water supply. Some of the achievements of the state in the agriculture sector are:

- Gross area sown from 108 lakh hectares in 2000-01 to 145 lakh hectares in the year 2010-11.
- Expansion in irrigation and water management with the spread of drip irrigation and sprinkler irrigation, provision of soil health cards for all land holders, preparation of village-wise soil fertility maps (including micronutrients)
- Innovations and initiatives like Krishi Mahotsav
- The largest producer of Castor and Cumin in the world
- Largest producer of Cotton, Groundnut and Isabgul in the country
- Ranks first in productivity of mustard, castor, cotton, onion and potato and second in productivity of Groundnut, Bajra and Banana.
- The State ranks 4th, 6th and 3rd places in India in production of fruit, vegetable and spices respectively.
- Horticulture contributes 11% share in area and about 20 % share in the overall farm income of the state
- Horticulture and vegetables production increased 300% in the last decade.
- The plan to setup more trellis, poly houses, green houses to the already existing infrastructure, the state's intention to be the horticulture hub are evident.
- The animal husbandry sector alone contributes 5 per cent to the GSDP and provides sustainable livelihood to approx. 42 lakh families.

- White Revolution that started in Gujarat has played an important role in sustainable development of the rural areas. The state has the highest number of milk producers' members (29.70 lakh) in dairy cooperative societies with the highest milk procurement (94.58 lakh) litres per day in the country.
- With 7.75 lakh ton of fish production which is worth Rs. 4151.05 crore, the state occupies a prominent place in the fisheries scenario of the country. Ranks first among the states in marine fish production (23 percent share) and third in total fish production (11 percent share).
- Major agricultural produce of the state includes cotton, groundnuts (peanuts), dates, sugar cane, milk and milk products. Industrial products include cement and petrol.

### *Industry sector*

2.32. The industry in Gujarat has been a dominant sector which has recorded a remarkable industrial development since its formation as a separate state in 1960. The domination of the sector is reflected by its contribution to the state GSDP. The textiles and auxiliaries industries dominated the 60's and were the major contributor to industrial economy of the state.

2.33. Over the years, Gujarat has diversified its industrial spectrum extensively today in 13 major industry groups. The most recent is the emergence of oil refineries which has emerged as one of the largest industrial groups followed by chemicals, Basic Metal, Food Processing, textiles, machinery and equipment, non-metallic mineral based products, plastic & rubber products and fabricated metal products.

2.34. Along with the diversification into different industrial groups, the state has been successful in widening its industrial base. Initially the industrial development was confined to four major cities namely Ahmedabad, Baroda, Surat and Rajkot and some isolated locations such as Mithapur and Valsad, however today, almost all the districts of the state have witnessed industrial development in varying degree. The massive scale of industrial development has been possible on account of prudent exploitation of natural resources, such as minerals, oil and gas, marine, agriculture and animal wealth.

2.35. The discovery of oil and gas in Gujarat in the decade of 60s played an important role in setting up of petroleum refineries, fertilizer plants and petrochemical complexes. The strong institutional network, availability of finance, raw materials, plant and equipment and marketing of products, setting up of District Industries Centers (DICs) and the state's infrastructure facilities such as power, roads, ports, water supply and technical education institutions all together has achieved the status of highly industrialized state in the country.

2.36. Gujarat has the distinction of being the power surplus state and first State to enact the Special Economic Zone (SEZ) Act, 2004. Some of the most important achievements of industry in the state are the oil refinery at Jamnagar, which is the world's largest grass-roots refineries, the world's largest shipbreaking yard at Alang near Bhavnagar, India's only Liquid Chemical Port Terminal at Dahej, developed by Gujarat Chemical Port Terminal Co Ltd. And Gujarat has two of the three liquefied natural gas (LNG) terminals in the country (Dahej and Hazira).

2.37. Gujarat is the only state in India to have a statewide gas grid of 2,200 km. Gujarat ranks first nationwide in gas-based thermal electricity generation with national market share of over 8% and second nationwide in nuclear electricity generation with national market share of over 1%. About 87.9% of the total roads in the state are asphalt surfaced and 98.86% village connectivity with all-weather roads is one of the highest in India.

2.38. The state produces about 90% of India's required amount of Soda Ash and provides about 66% of the nation's salt requirement. In Gujarat, Surat, a city by the Gulf of Khambat, is the hub of the global diamond trade, there is Jalalpur town, where several small and large textile industrial units have been established. Sanand city in Ahmedabad district is home to the Tata Automobile plant for manufacturing the World's cheapest automobile 'Nano'.

2.39. A 'Petro-capital' State of India, Gujarat offers 30% of Petrochemicals, 50% Chemicals and Pharmaceuticals business. The Gems and Jewellery is the fastest growing sectors in the country. The state is the largest producer and exporter of cotton and the third largest denim producer in the world, because of which it also known as the 'Manchester of the East' and 'Denim City.'

2.40. Gujarat also has the largest Optical fibre FC network of more than 50,000 km. and the state owned Wide Area Network is the largest IP-based ICT network in Asia Pacific Region and second largest in the world, connecting 26 districts and 225 talukas through 12,000 nodes and more than 900,000 internet users and all villages connected with broadband internet.

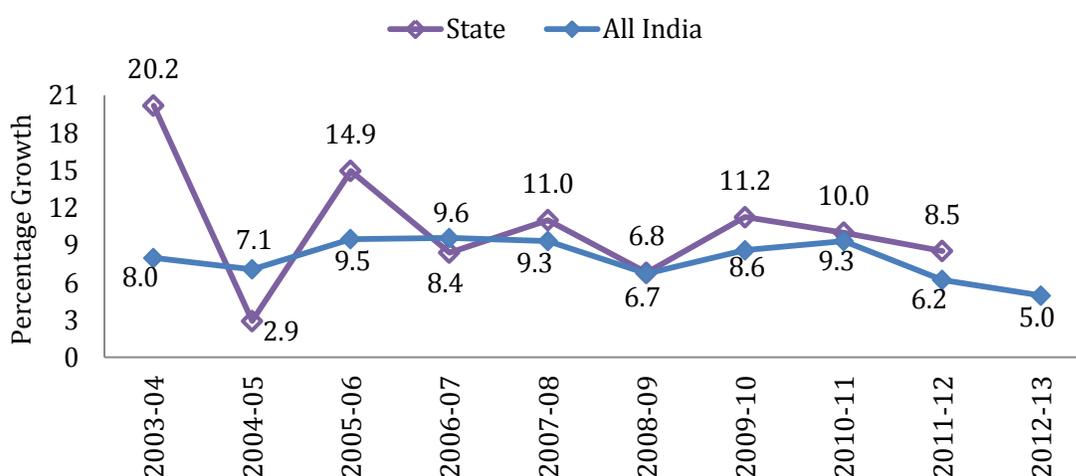
### Gross State Domestic Product

2.41. The State Domestic Product (SDP) commonly known as "State Income" is a measure in monetary terms of the volume of all goods and services produced within the geographical boundary of the state during a given period of time, accounted without duplication. This is the most important macro-economic indicator used to measure the growth and to study the structural changes taking place in the economy. The estimates of SDP over period of time reveal the extent and direction of the changes in the level of economic

development.

2.42. Gujarat whose share in total population is merely 4.99 per cent making it the 10th most populated state, but is the fifth largest contributor (7.9%) to the All India GDP after Maharashtra, Tamil Nadu, Uttar Pradesh and Andhra Pradesh. The overall Economy of Gujarat in the last 10 years has grown with an average growth of 9.7 per cent when the country grew by just 7.8 per cent and in last five period the annual growth of the state has been more than the annual growth of the country. Gujarat posted 8.5 per cent growth for the fiscal year 2011-12 when India's overall growth was 6.2 per cent and has fallen further to 5 per cent in 2012-13. And the state has continued higher growth than the country for last five years.

**Figure 2.1: Growth in Gross State Domestic Product (Constant Prices)**



Source: NCAER Computation

### Structure of the economy

2.43. In the financial year 2011-12, Gujarat was the second highest contributor (11.4%) after Maharashtra to All India GDP for the Industry Sector. In both the services sector and the Agriculture & Allied Sectors, Gujarat is the 5th highest contributor to the all India GDP for the respective sectors (5.99% in services and 6.97% in Agriculture & allied sector).

2.44. The structure of the economy of Gujarat has not experienced a major change over the last decade (Figure), the contribution of the agriculture & allied sectors has remained in the band of 12 to 18 per cent, with average contribution in last decade being approximately 15 per cent and 12.9 per cent for the latest information for the year 2011-12.

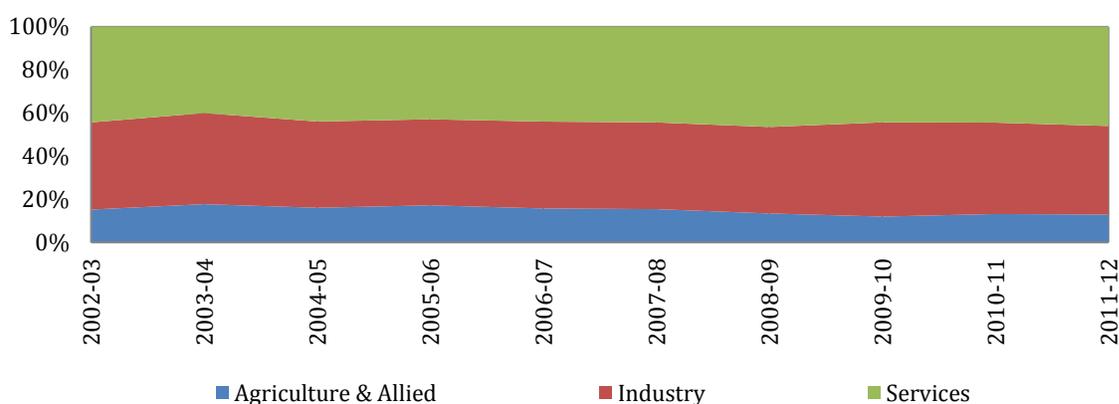
2.45. The Industry sector's contribution has hovered around 40 per cent

mark with maximum contribution in last one decade being 43.7 per cent in the year 2009-10 and was 41.1 per cent in the latest data for 2011-12.

2.46. The services sector has been the major contributor to Gujarat’s GSDP with an average share of 44 per cent during the last one decade and has risen to 46 per cent in the year 2011-12. Although the agriculture sector has the smallest share in the state’s GSDP, it has a significant contribution to the All India’s GDP for the particular sector.

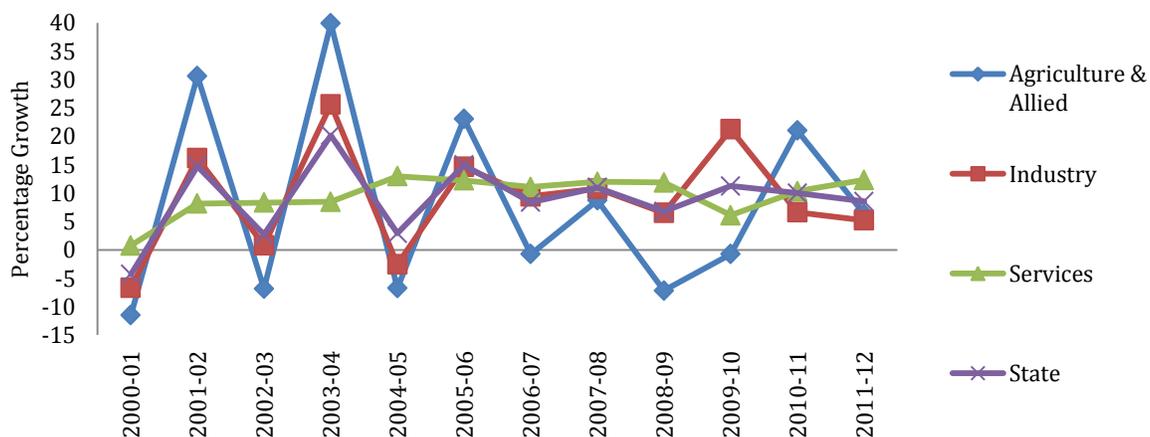
2.47. The 8.5 per cent growth in the states over all GSDP is attributed to more than 12 per cent growth of the services sector and 6.3 per cent and 5.2 per cent growth of the Agriculture & Allied sector and Industry Sector respectively for the year 2011-12.

**Figure 2.2: Structural Changes in GDP over the last decade**



Source: NCAER Computation

**Figure 2.3: Sectoral Growth in Gross State Domestic Product (Constant Prices)**



Source: NCAER Computation

**Tourism**

2.48. Gujarat is a land of rich Culture and Heritage, the Historical Places dating back from the time of Indus Valley Civilization and Mahabharata times to the existence of Vedas!, the energetic festivity, the originalities of the folk art, music and dances. Above all, the land of the Mahatma and Sardar Patel, along with many more freedom fighters have left their footprints on the sands of time, infusing the qualities of tolerance, brotherhood, non-violence and patriotism into Indians.

2.49. The state with diverse history stretching from age old Harappan Civilization to the Mughal period and its endless journey from Roots to Wings is timeless with historical and cultural traditions glorifying the State. Where Lothal gives unparalleled insight into the Harappan civilization, Ahmedabad has specimens of Indo-Sarcenic architecture, Palitana has a profusion of temples in the Jain style, Junagadh displays Buddhist caves and Rajput architecture appears all over different parts of Gujarat.

2.50. Tourism in Gujarat offers a Traveller's Paradise, offering a wide spectrum of Tourism sectors which sing in the glory of Gujarat's rich culture and heritage. Spiritual tourism, nature, Business, Heritage, Medical, Recreational & Cultural, Health, Urban & Rural tourism, Adventure and sports tourism.

*Rich culture & heritage*

2.51. The UNESCO listed world heritage site of Champaner as one of the most remarkable archaeological zones in Gujarat with Hindu temples and step wells at neighbouring Pavagadh, built in the 16th century with mosques that are considered perfect examples of the Gujarat Sultanate's Indo-Saracenic architecture. The Jami Masjid and Nagina Masjid have exquisite sculptures on the pillars and along the mihrab

2.52. Gujarat is well-known as the land of Mahatma Gandhi. His great achievements in the state culminated in the Protest March from Ahmedabad to Dandi that is said to have done the maximum damage to the British Empire in India. The tour from Porbandar to Dandi offers insight into the life and philosophies of the man the world loves to call Mahatma.

2.53. Gandhiji was instrumental in setting up of institute Rashtriya Shala in 1921 to revive handicrafts including rare weaves like the Patola. Ahmedabad was the base of the Gandhiji's struggle for freedom, eradication of untouchability dignity of labour, instilling respect for all religions, creating the spirit of fearlessness and promoting the use of Indian goods.

2.54. Gujarat's Princely heritage has more than 20 Heritage Hotels including converted Forts and Palaces.

*Nature and  
wild life  
tourism*

2.55. Gujarat with dry deciduous forests, majestic grasslands, marine ecosystems, wetlands and rich moist deciduous forests is a dream destination for those who quest for nature and wild life. The state is home to rare wild life inhabitants, known for its wildlife icon of Lions in the Gir reserve, the Wild Ass in the Rann of Kutchh, Indian bustards in bird reserves, four horned Antelope and Black Buck are among many animals and birds protected in the state's four national parks and 21 sanctuaries. The Whale Shark breed on the coasts of Gujarat and Okha small coastal town in Jamnagar district is famous for not only the Krishna Temple Bet Dwarka but for the large marine mammal dugong. This Saurashtra coast of Okha is known for the world largest dugong recorded till date which was 4.06 meters long and weighed 1016 kgs. Another first to Gujarat is India's first Marine National Park at the Gulf of Kutchh

*Handicraft &  
handlooms*

2.56. The queen of textiles is the Patola woven by only few families of Patan. About 700 Salvi weavers are said to have come to Patan when it was the capital of the Solanki rulers, their patrons, and today only a few continue their tradition. Jamnagar is one of the best known centers for Bandhini of tie-and-dye, which involves dyeing a fabric in stages to achieve the final pattern. After the fabric is dyed, the areas to be left in the first colour are knotted and covered with resist before it goes back for the dip in the next colour. Resist tie-and dye stages continue till the fabric is ready for the market.

2.57. Kutch is also a centre for block-printing including the intricate "Ajraikh" printing, practiced in villages like Dhamadka and Ajraikhpur near Bhuj. Beadwork is a beautiful craft of Gujarat that is believed to have become popular after trade with the west from the ports in the state brought in top quality beads from overseas in the 19th century. Gujarat's tradition of terra-cotta work is seen in most cities, towns and villages where potters work on making utensils, prayer objects, decorative items and flower pots on their wheels. Gujarat is also known for its ceramics. Morvi, Rajkot and villages of Surendranagar District have thriving cottage industries producing ceramic products. Gujarat has a tradition of woodcarving visible in beautifully sculpted balconies with their perfectly proportioned pavilions of the havelis, carved doors, and palace gates. Gujarat is known for its silversmiths who produce beautiful jewellery, utensils and objects. Rajkot, Gondal, Wadhwan and other places of Saurashtra are known for their silverwork and Kutch produces some of India's finest silver ornaments.

*Fairs and  
festivals*

2.58. Gujarat celebrates more than 2000 Fairs and Festivals in a year some of them being Navratri Mahotsav, Uttrayan, Modhera sun temple festival, Kutch utsav, Bhavnath Fair Patangotsav, Sharadotsav and Rannotsava apart from, mahashivratri melas, etc.

2.59. Navratri in September – October is probably the world’s longest dance festival and is described as a cultural celebration unparalleled in sheer size. Ras is a simple dance based on the Gope culture of Lord Krishna, followed by pastoral groups like the Ahirs and Bharwads. Uttarayan or Makar Sankranti in January every year is like no other day in Gujarat, one of most participatory festivals when countless people throng terraces to fly kites. The kite flown during Uttarayan is internationally called the ‘Indian fighter’ and it is usually made out of bamboo and tissue paper. The Modhera Dance Festival is held annually at the 11th century Sun temple of Modhera in January, Kutch utsav is a festival that features the folk culture of Kutch district, the Bhavnath Fair held at the Bhavnath Temple near Damodar Kund on the outskirts of Junagadh during Shivratri, Chitra Vichitra fair; on a moonless night or Amawas after Holi, tens of thousands of tribals gather to celebrate the Chitra Vichitra Fair at the confluence of three rivers, near the village of Poshina.

*Religious & spiritual tourism*

2.60. From the Somnath temple built in 1950 in Junagadh is the seventh temple built to commemorate the glory of Lord Somnath who was known as Bhairaveshwar in yajur Yug, Shravanikeshwar in Treta Yug and Shrigaleshwar in DwaparYug. A holy place of the Aadi Jyotirling Shree Somnath Mahadev and the sacred soil where from Bhagvan Shri Krishna took his last journey to his neejdham.

2.61. Dwarka located in the Jamnagar district was the capital of Lord Krishna's terrestrial kingdom in ancient Anarta (Saurashtra). Pavagadh which along with Champaner and Marchi is a UNESCO world heritage site, is not only a historical and religious destination but also known for being the birthplace of Gujarat’s famous musician, Baiju Bawra.

2.62. Mount Girnar at Junagadh, is one of the holiest of the holiest for Hindu ascetics and Jains. Many sadhaks and advanced souls have laid their lives to rest on the mountain, notably - the Jain tirthankar Neminath, adding to its holiness.

2.63. Gujarat is home to many more religious destinations which satisfy the spiritual hunger of one and all. Among the many are the Two of 51 Shakti Peeths at Ambaji and Mahakali at Pawagadh, one of the seven holiest rives for hindus, Narmada flows through the state, Temples situated in Dakor, Virpur, Khodiyar, Sarangpur, Gondal etc. are holy places with individual faith. Three of the four most important pilgrimages for Parsees – Sacred Iranshaw, Fire Temple at Udvada, Navsari Atashbehrum and Surat Atashbehrum are situated in Gujarat. The Akshardham, Gadhada, Bachosan, Gondal, Sarangpur, etc are some of the famous Swaminarayan temple. Two of the five important Jain sites in India are at Palitana and Girnar, along with the other Jain temples

Sankeshwar, Taranga, Kumbhariyaji, Badhreshwar Mandvi, Mahudi etc. The Dargahs of Sarkhej and Unjha are among the much visited Islamic sites of India.

*Medical and health tourism*

2.64. A new focus in Gujarat is the Medical Tourism because of one of the leading cities, Ahmedabad which is an extraordinary place for medical tour or medical treatments venue in India. With world class health facilities, zero waiting time and affordable cost, Ahmedabad is one of the most sought after medical tourism destination in India. Not only the world class amenities, hospitals and ambulance services with 'cost effective' facility with medical camps, travel trips and entertainment are available.

2.65. The age old well-being health techniques such as the Yoga, Ayurvedic, Homeopathy, Naturotherapy, Pranic healing, Reiki, etc have a strong presence in Gujarat

2.66. The World class hospitals in Ahmedabad, Nadiad, Karamsad and Vadodara offer unique treatment to patients coming from all over the world. The Ayurvedic healing through the use of natural herbs and natural cures, a number of Spas located in Gandhinagar, Mehsana, Ahmedabad are the unique techniques for treatment, healing and rejuvenating. Yoga an ancient art of Hindu philosophy

2.67. Yoga an ancient art of Hindu philosophy which encourages not only physical and mental fitness for mind, body and soul but also the spiritual well-being is a major attraction for the foreign tourists who have experienced this art in Gujarat.

### 3. DATA SOURCES AND THEIR KEY FINDINGS

- Data Sources** 3.1. The important data sources used for the preparation of the second TSA for India are the following:
- Domestic Tourism Survey of NSSO, 2008–09
  - International Passenger Survey of Indian Statistical Institute (ISI), Kolkata, 2010–11
  - Employment and Unemployment Survey of NSSO, 2009–10
  - Consumer Expenditure Survey of NSSO, 2009–10
  - State Accounts by State Department of Economics and Statistics, 2012

**Domestic Tourism Survey (DTS)** 3.2. National Sample Survey Office (NSSO) conducted its first comprehensive survey on domestic tourism, called Domestic Tourism Survey, during the period July 2008 to June 2009. This was an all-India household survey and was carried out as part of NSSO's 65th Round of sample surveys.

3.3. A detailed schedule of enquiry was used to collect data from the sample households on various parameters like household characteristics such as comprising household size, principal industry, principal occupation, household type, religion, social group, consumption expenditure, number of overnight trips, and same-day trips undertaken, visits of NRIs to the households and their impact, renting out of some portion of the house to tourists during the last 365 days, and awareness, source of information, and impact of the "Incredible India" campaign by the Government of India or other tourism promotional campaigns.

3.4. Data were also collected for each household member on age, gender, marital status, educational level, usual principal activity status, industry and occupation of employed members, number of overnight as well as same-day trips completed during the last 30 days and the last 365 days.

3.5. For each trip, data on various trip characteristics were also collected. These included leading purpose of the trip, main destination, number of places visited, mode of travel, type of stay, number of nights spent outside usual place of residence, and so on. Finally, for the latest three overnight trips completed during the last 30 days, detailed data were collected on expenditure on different items under the heads of accommodation, food and drink, transport, shopping, recreation, religious, cultural, sporting, and health-related activities, and other expenditures along with information of reimbursement/direct

payment by any institution for such trips.

3.6. The main objectives of the survey were to estimate the volume of domestic tourism in terms of number of visitors, number of households undertaking domestic tourism activity and number of trips that contributed to domestic tourism in India; to study the characteristics of visitors such as age, economic level, activity status, occupation and industry of work; to study the characteristics of trips such as purpose, main destination etc; and to estimate the expenditure incurred by the households in domestic tourism activity.

3.7. For the DTS 2008-09, a stratified multi-stage sampling design was adopted. In all, 1,53,308 households were surveyed from 8109 sample villages and 4719 urban blocks spread over all states and union territories of India. Of the total households, 97,074 (63 per cent) belonged to the rural areas and 56,234 to urban areas. Out of the total sample households, number of households reporting overnight visitors was 1,44,384.

3.8. In Gujarat, the sample number of households was 6258, comprising 3343 from rural areas and 2915 from urban areas. Number of households reporting overnight visitors were 5974. In other words, 95 per cent of the sample households reported overnight visitors.

3.9. For India, total number of households reporting overnight visitors was estimated at 20.61 crore and total number of overnight visitors was estimated at 78.35 crore. These numbers for Gujarat were 1.02 crore and 3.98 crore respectively. The rural-urban breakup suggests that of the total 3.98 crore overnight visitors, as much as 63.7 per cent were from rural areas of the state. As compared to this, at national level, overnight visitors belonging to rural areas are 73.2 per cent of the total.

3.10. Intensity of domestic tourism in each state is measured by the number of trips per 100 household during a year. Gujarat's intensity of overnight domestic tourism stood at an average of 402 trips per 100 households, as compared to the all-India average of 418 trips per 100 households. The incidence of trips per 100 rural households was recorded at 422 for Gujarat as against 440 for India. The same for urban sector was recorded to be 370 trips per 100 households for Gujarat which was similar to the all India average of 365.

*Use of DTS in preparation of state TSA*

3.11. The DTS data that were used in the preparation of TSA for Gujarat were the expenditure data by items of expenditure and by purpose of travel. These expenditures were collected for the tourists who travelled within the state providing information on Domestic Tourism Expenditure of the state. Also

these data were used to arrive at the expenditures of those tourists who belonged to other states of India but whose main destination was Gujarat. This formed one part of Inbound Tourism Expenditure, the other part being expenditure of foreign tourists that visit the state, which was obtained from the International Passenger Survey.

**DTS- key findings for Gujarat**

3.12. In all, 10.45 crore visitor-trips originated from Gujarat (here, Gujarat is the state of origin), of which only one tenth (10.1 per cent) of the trips were undertaken in the states other than Gujarat.

3.13. Of the total 10.45 crore visitor-trips, 62.9 per cent originated from the rural parts of the state. As compared to this, at national level, 73.5 per cent of the total 211.7 crore visitor-trips originated from the rural sector

3.14. On the other hand, with Gujarat as the state of destination, a total of 7.47 crore visitor-trips were undertaken. Of these 6.7 per cent of the trips were undertaken from states other than Gujarat. Hence, the majority or the tourism activity occurred within the state.

3.15. While the share of Gujarat in total population of India stands at 5.01 per cent<sup>14</sup>, the share of visitor-trips undertaken in Gujarat (from within and other states) in the All-India total of 211.7 crore is a little lower at 3.53 per cent.

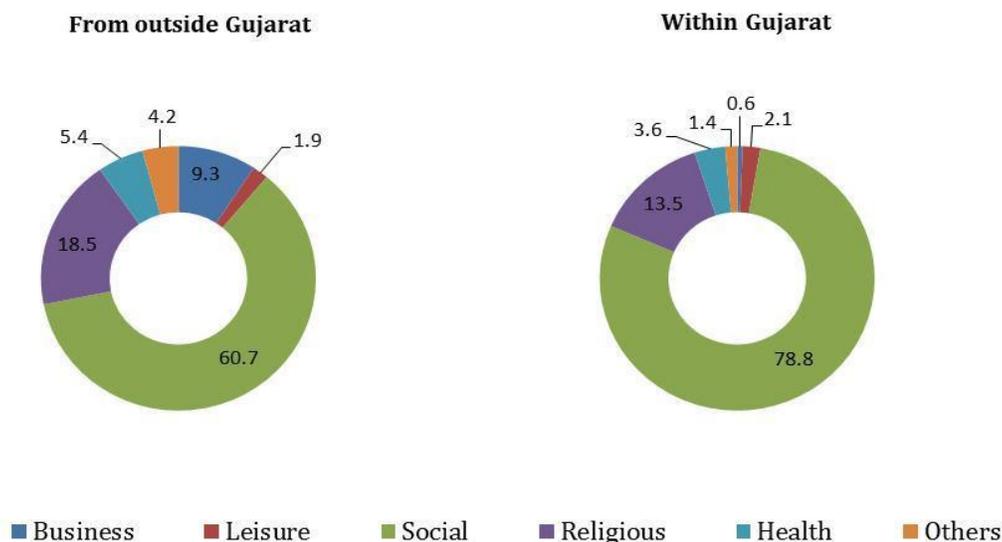
*Trips by purpose of travel*

3.16. The distribution of trips by purposes reveals that of all the trips that were undertaken within the state (Gujarat being both the state of origin and the state of destination), 78.8 per cent were social trips, so most of the trips were undertaken to visit friends or relatives. Only 2.1 per cent of the trips were leisure trips.

3.17. As compared to this, among the trips that were undertaken from outside the state to Gujarat, as much as 60.7 per cent were Social trips. The share of religious trips was the second highest (18.5 per cent) while the share of leisure trips was only 1.9 per cent (figure 3.1).

<sup>14</sup> Population numbers also obtained from NSSO survey on Domestic Tourism

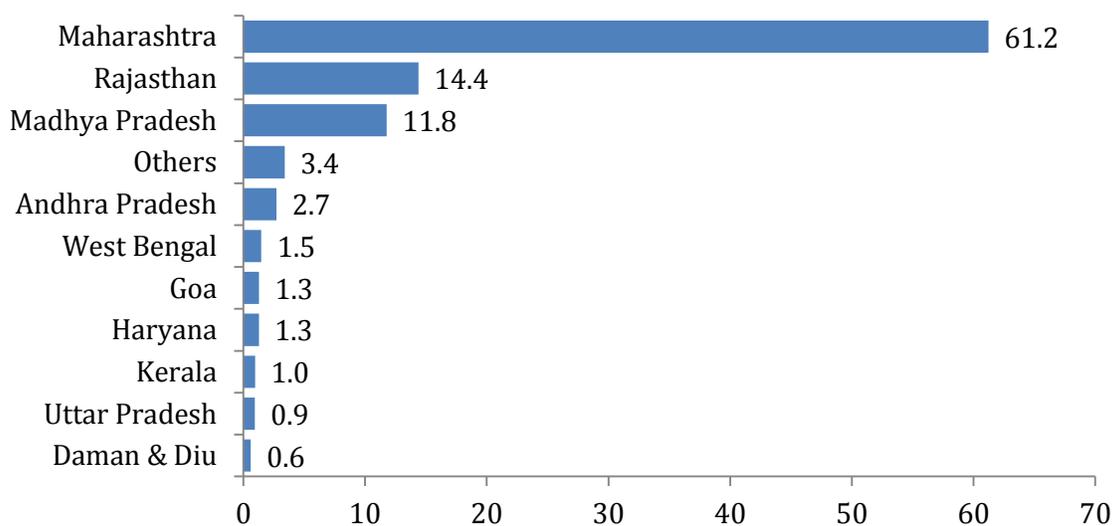
**Figure 3.1: Distribution of trips undertaken by purpose - Gujarat**



Source: NCAER Computation

3.18. As shown in figure 3.2, of the total visitor-trips undertaken from other states with Gujarat as main destination, Maharashtra contributed the maximum number of trips (61.2 per cent), followed by Rajasthan (14.4 per cent) and Madhya Pradesh (11.8 per cent). This is mainly because of the prominence of social trips in total trips made to Gujarat and the neighbourhood effect of the states.

**Figure 3.2: Per cent distribution of trips to Gujarat by states of origin**



Source: NCAER Computation

3.19. Further analysis reveals that trips originating from Maharashtra and Rajasthan were largely undertaken for social purpose (72.4 and 51.6 per cent respectively) but those from Madhya Pradesh were predominately business trips (38.9 per cent) and religious trips (34.2 per cent).

3.20. Interestingly most of the social, religious and leisure trips undertaken in Gujarat originated from Maharashtra (73.1, 68.2 and 44.2 per cent respectively) whereas most of the medical trips (60.6 per cent) originated in Rajasthan and the highest proportion of business trips (49.5 per cent) made to Gujarat originated from Madhya Pradesh.

### International Passenger Survey (IPS)

3.21. MoT commissioned the Indian Statistical Institute (ISI), Kolkata to conduct the International Passenger Survey (IPS) for the year 2009-10. The survey targeted the following three categories of International tourists, namely

- (i) Foreign nationals visiting India,
- (ii) Non-Resident Indians visiting India, and
- (iii) Indian Residents travelling abroad.

3.22. The sampling methodology used was stratified sampling with the 15 port points, selected initially, being divided into two set of ports. Two of the ports – Goa and Raxaul – were also selected as points of survey but no survey was conducted at Goa airport (permission was not granted) and at Raxaul (passenger size was very scanty as seen in the pilot/initial survey).

3.23. The Foreign Resident survey covered 13 ports, namely four international airports – Chennai, Delhi, Kolkata and Mumbai; 4 other airports - Ahmedabad, Bangalore, Cochin, Hyderabad and 5 land check-posts – Attari, Haridaspur, Ghojdanga, Munabao and Sonauli. Outbound Indian Residents survey was conducted for 11 ports out of which four are international airports – Chennai, Delhi, Kolkata and Mumbai, 4 other airports - Ahmedabad, Bangalore, Cochin, Hyderabad and three land check-posts – Haridaspur, Ghojdanga and Munabao.

*66.03 lakh  
foreign  
tourists visited  
India in 2010-  
11*

3.24. Stratified random sampling was adopted for the selection of passengers for the survey. In case of IPS a total of 40,672 passengers were surveyed at 13 exit points across the country. The total number of foreign tourists departing from the exit points covered by this survey during the period 2009-10 is estimated at 66,03,897.

3.25. The principal objectives of the survey were:

- To estimate the total number of tourist arrivals in India. The tourists

were to be identified as foreign tourist (PIOs and others) and Non-Resident Indians.

- To assess the detailed expenditure pattern of the foreign tourists visiting the country.
- To assess the number of outbound tourists to various countries.
- To evaluate the performance of existing tourist facilities in India.
- To estimate the average duration of stay of foreign tourists in India including country-wise details.
- To obtain demographic, economic and social profiles of foreign tourist visiting India and the motivational factors responsible for attracting them to India.

*Use of IPS data in preparation of State TSA*

3.26. The data from IPS were used to obtain the expenditure incurred by the foreign tourists in India, by items of expenditure and by types of tourists, namely NRIs, PIOs and other foreign tourists. These data were used in the preparation of TSA at national level. Since the data failed to capture the expenditure incurred in different states of visit, these data could not be used in the preparation of state TSA. However, assuming that the foreign tourists' expenditure pattern is the same across states, we have only used the national level structure and imposed the per-tourist expenditure on the total number of foreign tourists that visited the state during the period of reference. This number was obtained from the MoT publication, India Tourism Statistics.

3.27. On the other hand, the data on pre-trip expenditure incurred by outbound tourists (Indian tourists travelling abroad) could be obtained by states. The survey provides information on the respondent's state of residence; hence we can obtain the data on number of tourists travelling abroad from each state and on their pre-trip expenditure which is assumed to have been largely incurred in the state of reference. These expenditures are obtained by the items of expenditure and by purpose of travel.

**IPS – Key Findings for Gujarat**

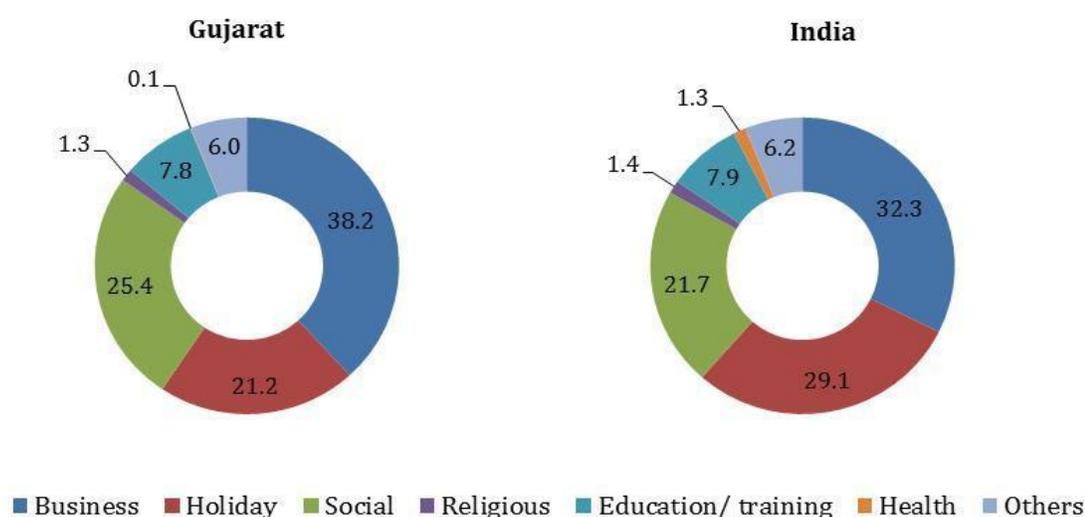
3.28. According to the India Tourism Statistics, the foreign tourist visits in Gujarat grew from just about 30930 in 2001 to more than 6 times in 2013. The state hosted a total of 198773 foreign tourists during 2013, posting an annual growth of 14.1 per cent as against the all-India growth of 9.2 per cent over the year 2012.

3.29. With regard to outbound tourists, the latest data (based on IPS survey) reveal that the number of people living in Gujarat who travelled abroad during 2010-11 was 9,11,436. With this, the state accounted for 8.41 per cent of the total 1.08 crore outbound tourists in India, the fourth highest among all the

states.

3.30. According to figure 3.3, the percentage distribution of outbound tourists (after normalising for “No Response”) reveals that at all-India level, majority of the tourists travelled abroad for business purposes, that is, 32.3 per cent. This is closely followed by outbound tourists travelling for leisure (29.1 per cent). Tourists travelling for social purpose accounted for 21.7 per cent and the remaining 16.8 per cent travelled for religious (1.4), education (7.9), medical (1.3) and other (6.2) purposes.

**Figure 3.3: Distribution of number of Outbound Tourists by purpose – Gujarat and India**



Source: NCAER Computation

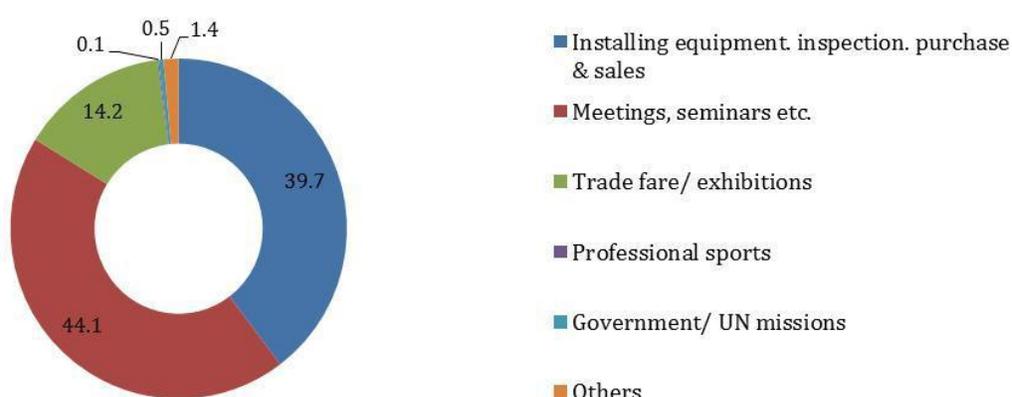
3.31. As compared to this, of the total outbound tourists of Gujarat, about 85 per cent travelled abroad for business, social and leisure purpose. As much as 38.2 per cent travelled for business, 25.4 per cent for social and 21.2 per cent for leisure purpose. Tourists travelling for religious purpose were 1.3 per cent, education 7.8 per cent, medical 0.1 per cent and for other purposes were 6.0 per cent (figure 3.3).

3.32. The percentage distribution of outbound tourists (across the missions for which the trip was undertaken) whose state of residence is Gujarat and who travelled for business purposes shows that 44.1 per cent business trips were made for participation in meetings and seminars while 39.7 per cent trips were undertaken with a mission of installing equipments, inspections, purchase or sales. About 14.2 per cent of the business trips were made for attending trade fares, exhibitions etc. (figure 3.4).

3.33. While looking at the percentage distribution of leisure trips undertaken

by residents of Gujarat across the reasons of such trips, it is observed that most of the leisure trips (41.3 per cent) were undertaken because of the fact that the outbound tourists find themselves attracted more towards foreign destinations than towards similar Indian destinations. Almost 17.6 per cent of the outbound leisure trips were made to foreign countries because the tourists reported to have relatives and friends living abroad for hosting them. As much as 10 per cent of the trips were undertaken to foreign countries for each of the two reasons, desired destinations are not available in India and increase in status in society. Cheaper tour packages conducted 5.9 per cent of such trips made outside India (refer to figure 3.5).

**Figure 3.4: Percentage Distribution of mission for which Business Trip is Undertaken – Gujarat**



Source: NCAER Computation

**Figure 3.5: Percentage distribution of reasons for preferring foreign destination when Leisure Trip is undertaken – Gujarat**



Source: NCAER Computation

### Employment and Unemployment Survey

3.34. Employment and employment survey is part of the quinquennial programme of NSSO surveys. The data source on employment table for the State TSAs is the 66th round survey on employment and unemployment for the year 2009-10. By a decision of the National Statistical Commission, the quinquennial survey of employment-unemployment (and consumer expenditure) was repeated in the 68th round (2011-12) although it was only two years since the 66th round survey had taken place. However, the data source on employment table for the State TSAs is the 66th round survey on employment and unemployment for the year 2009-10.

3.35. The quinquennial EUSs of NSSO aim to measure the extent of 'employment' and 'unemployment' in quantitative terms disaggregated by household and population characteristics. The persons surveyed are classified into various economic activity categories on the basis of the activities pursued by them during certain specified reference periods.

3.36. Three reference periods are used in these surveys. These are (i) one year, (ii) one week and (iii) each day of the week. Based on these three periods, three different measures of employment are arrived at, of which the one with 365 days reference period, called workforce according to 'usual status' approach, is widely used.

### Use of EUS data in preparation of State TSA

3.37. For the TSA tables, the employment data is based on usual activity status in both principal and subsidiary activities. The usual activity status (it is the activity situation in which a person is found during a reference period that relates to the person's participation in economic and non-economic activities) relates to the activity status of a person during the reference period of 365 days preceding the date of survey. The activity status on which a person spent relatively longer time (major time criterion) during the 365 days preceding the date of survey is considered the principal usual activity status of the person.

3.38. The sampling design adopted was essentially a stratified multi-stage one for both rural and urban areas. The number of households surveyed was 1,00,957 (59,129 in rural areas and 41,828 in urban areas) and number of persons surveyed was 4,59,784 (2,81,327 in rural areas and 1,78,457 in urban areas).

3.39. The main objective of the employment-unemployment surveys conducted by NSSO at periodic interval is to get estimates of level parameters of various employment and unemployment characteristics at national and state level.

3.40. A schedule of enquiry was used in the 68th round, like other rounds of

EU survey, to collect information on various facets of employment and unemployment in India in order to generate estimates on various employment and unemployment and labour force characteristics at the national and State levels. The information on the following aspects was collected through well designed schedule:

- Household size, religion, social group, land possessed, land cultivated etc.;
- Information on MNREGA for population living in rural areas;
- Information on household monthly consumer expenditure for a set of consumer items;
- Demographic particulars, like age, sex, educational level, status of current attendance and vocational training;
- Usual principal activity status and subsidiary economic activity status of the all members of canvassed households;
- Particulars of the enterprise for all the usual status workers (excluding those engaged in growing of crops and growing of crops combined with farming of animals) viz., location of work place, type of enterprises, number of workers in the enterprise etc. and some particulars on the conditions of employment for the employees, like type of job contract, eligibility for paid leave, availability of social security benefits, etc.
- Extent of underutilization of the labour time and on the qualitative aspects of employment, like changes in activity status, occupation /industry, existence of trade unions/associations, nature of employment (permanent/temporary) etc;
- Participation in specified activities by the household members who are classified as engaged in domestic duties in the usual principal activity status.

3.41. Table 3.1 given below presents the number of workers estimated using 66th round EU survey micro-data for Gujarat.

Table 3.1: Estimated number of workers by status - Gujarat (Numbers in '000)

		Rural			Urban			All		
Worker		Male	Female	Total	Male	Female	Total	Male	Female	Total
Principal	Own account worker	4964.9	2150.8	7115.6	2636.6	360.6	2997.2	7601.4	2511.4	10112.8
	Employer	136.4	0.8	137.1	126.1	0.0	126.1	262.4	0.8	263.2
	Regular Employee	859.6	109.5	969.0	2586.2	525.2	3111.4	3445.7	634.7	4080.4
	Casual wage labor	3743.8	1509.6	5253.4	858.4	291.5	1149.9	4602.2	1801.1	6403.3
Subsidiary	Own account worker	1166.2	1224.2	2390.4	76.9	127.1	203.9	1243.0	1351.3	2594.3
	Employer	16.0	33.7	49.7	0.5	0.0	0.5	16.5	33.7	50.2
	Regular Employee	30.7	45.6	76.3	13.4	6.3	19.7	44.2	51.9	96.0
	Casual wage labor	907.9	703.8	1611.7	44.9	60.7	105.6	952.8	764.5	1717.3
Principal + Subsidiary	Own account worker	6131.0	3375.0	9506.0	2713.4	487.7	3201.1	8844.4	3862.7	12707.1
	Employer	152.4	34.5	186.8	126.6	0.0	126.6	278.9	34.5	313.4
	Regular Employee	890.3	155.1	1045.4	2599.6	531.5	3131.1	3489.9	686.5	4176.5
	Casual wage labor	4651.7	2213.4	6865.1	903.3	352.2	1255.5	5555.0	2565.6	8120.6

**Household  
Consumer  
Expenditure  
Survey**

3.42. NSSO has been conducting the 'Household Consumer Expenditure surveys' (CES) on quinquennial basis. The first round of the CES (October 1972 - September 1973) in the quinquennial series was the 27th round. The ninth survey in the series, had been embarked for the 68th round conducted during July 2011 - June 2012. By a decision of the National Statistical Commission, the quinquennial survey of consumer expenditure (and employment-unemployment) was repeated in the 68th round (2011-12) although it was only two years since the 66th round survey had taken place. The whole geographical area of the country is covered in EU surveys except for a few villages of Nagaland and Andaman and Nicobar Islands accessibility to which is difficult.

3.43. A stratified multi-stage design was adopted for the CES. The number of households surveyed in 66th round was 1,00,794 (59,097 in rural areas and 41,697 in urban areas). The prime aim of the CES was to generate estimates on monthly per capita consumer expenditure (MPCE) and its distribution across the different sections of the population like rural and urban and different socio-economic groups etc. both at country level as well as the State level.

3.44. These indicators are amongst the most important measures of the level of living of the respective domains of the population. The distribution of MPCE highlights the differences in level of living of the different segments of the population and is an effective tool to study the prevalence of poverty and inequality. These numbers enable the apex planning and decision-making process to allocate the nation's resources among sectors, regions, and socio-economic groups, and assess the "inclusiveness" of economic growth.

3.45. Besides measuring the household consumption level and its pattern, the CES has another important use. To work out consumer price indices (CPIs) which measure the general rise in consumer prices, one needs to know not only the price rise for each commodity group but also the budget shares of different commodity groups (used as weights).

3.46. In the 66th round of CES, two types of schedules of enquiry, type 1 and type 2, were canvassed. The only difference in the two types of the schedules was the reference period used for collection of consumption data. Data from type 1 schedule has been used in the estimations used in State TSAs.

3.47. Schedule Type 1 was canvassed following the traditional way of the previous quinquennial CES rounds. For less frequently consumed items, the information was collected for last 30 days and last 365 days consumption while for more frequently used items like food and fuel etc. the information was

collected for the last 30 days consumption only.

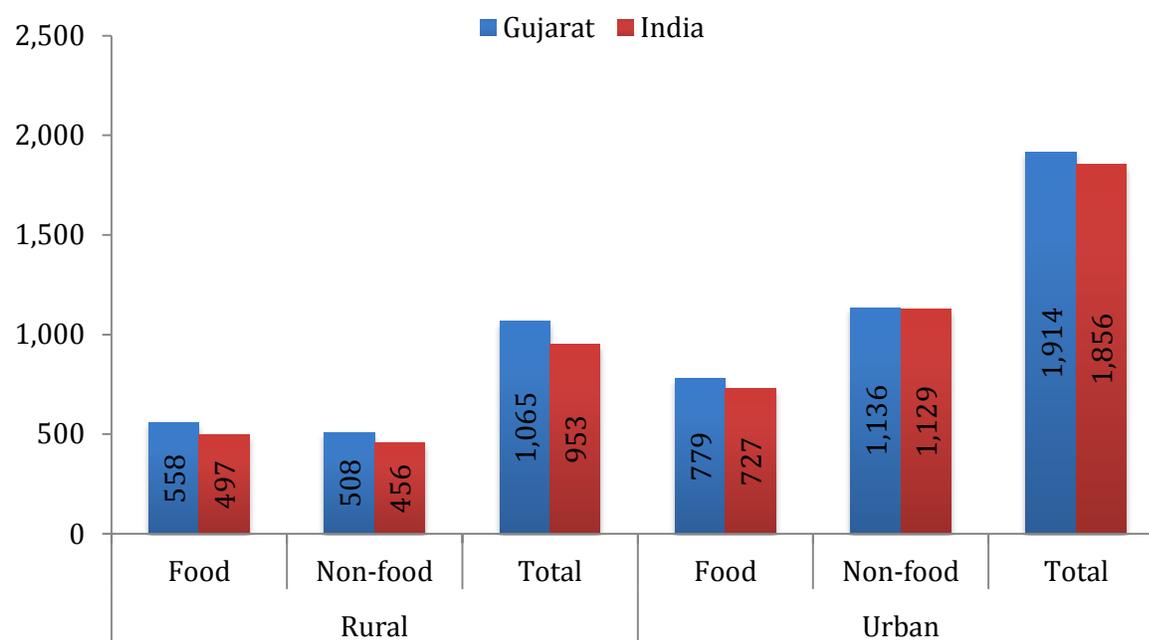
3.48. On the other hand, the reference periods for schedule type 2 were last 365 days (only) for the infrequently purchased items, last 7 days for very frequently consumed items like some of the food items, pan, tobacco and intoxicants etc. and last 30 days for other food items, fuel etc.

3.49. A very detailed item classification was adopted to collect information on consumption of more than 300 items consumed by the households. The items on which the information was collected include 142 items of food, 15 items of energy (fuel, light and household appliances), 28 items of clothing, bedding and footwear, 19 items of educational and medical expenses, 51 items of durable goods, and 89 other items. Other demographic information on household members like age, sex, educational attainment etc. were also collected through the CES schedules.

*Use of CES  
data in  
preparation of  
State TSA*

3.50. The main use of CES results in the preparation of TSAs is to estimate the product level ratios of tourist expenditures as percentage of overall household expenditures and these ratios are applied on the PFCE estimates coming from the national accounts statistics. This adjustment is important to ensure the overall consistency of survey results with the national accounts statistics. The data source on household expenditure table for the State TSAs is the 66th round of CES for the year 2009-10.

3.51. According to CES, MPCE (at MRP) on both food and non-food in rural and urban Gujarat is higher than that for All India. Overall MPCE in rural Gujarat (Rs. 1065) is about 12 per cent higher than that for India (Rs. 953) and total MPCE for urban Gujarat (Rs. 1914) is almost 3 percent higher than that for urban India (Rs. 1856), as given in figure 3.6.

**Figure 3.6: MPCE at MRP on food, non-food and total – Gujarat and India**

Source: NCAER Computation

3.52. Major constituents of expenditure on food are cereals and milk and milk products both in rural as well as urban parts of Gujarat and India. See Table 3.2 for MPCE by broad categories for Gujarat and All India.

**Table 3.2: Break-up of monthly per capita consumer expenditure over broad categories of goods – Gujarat and India, (Rupees value of per capita consumption in 30 days)**

Sl. No.	Item Category	Gujarat		All India	
		Rural	Urban	Rural	Urban
1	Cereal	121.2	147.5	145.1	161.9
2	Cereal Substitutes	0.3	0.3	0.7	0.8
3	Pulses and Pulse Products	42.1	58.9	35.7	49.8
4	Milk and Milk Products	132.8	198.9	80.2	138.7
5	Sugar	32.0	37.9	22.6	27.6
6	Salt	1.4	1.7	2.1	2.4
7	Edible Oil	57.0	72.4	34.1	46.1
8	Egg, Fish & Meat	10.5	13.5	32.3	48.0
9	Vegetables	68.8	96.5	57.2	76.7
10	Fruits (Fresh)	13.0	27.2	11.8	29.5
11	Fruits (Dry)	1.9	8.5	3.1	7.8
12	Spices	22.3	28.5	20.3	25.2
13	Beverages, Refreshments, etc.	54.4	86.8	52.0	113.0
<b>14</b>	<b>Food: Total (1-13)</b>	<b>557.6</b>	<b>778.6</b>	<b>497.1</b>	<b>727.5</b>
15	Pan, Tobacco & Intoxicants	22.8	17.0	20.6	21.9
16	Fuel and Light	101.7	167.0	87.8	142.8
17	Clothing and Bedding	60.6	92.0	57.6	98.6
18	Footwear	11.8	17.7	10.0	19.8
19	Education	50.1	122.6	40.3	162.2
20	Medical (Institutional)	28.0	65.1	17.8	34.0
21	Medical (Non-institutional)	19.7	55.1	39.3	64.7
22	Entertainment	10.4	35.5	8.2	31.5
23	Minor Durable-type Goods	1.8	5.2	2.5	4.3
24	Toilet Articles	23.2	50.5	23.2	44.0
25	Other Household Consumables	23.8	40.5	20.3	35.8
26	Consumer Services Excluding Conveyance	54.4	137.9	44.5	127.3
27	Conveyance	49.9	135.1	37.6	115.2
28	Rent	2.8	77.9	4.8	117.8
29	Taxes and Cesses	4.5	16.3	2.3	16.0
30	Durable Goods	42.4	100.2	39.3	92.6
<b>31</b>	<b>Non-food: Total (15-30)</b>	<b>507.8</b>	<b>1135.5</b>	<b>456.0</b>	<b>1128.5</b>
<b>32</b>	<b>Total Expenditure (14+31)</b>	<b>1065.4</b>	<b>1914.2</b>	<b>953.0</b>	<b>1856.0</b>

Source: Key Indicators of Household Consumer Expenditure in India (NSS KI 68/1.0), NSSO

**State GDP  
Accounts**

3.53. At national level, the estimates of Gross Domestic Product are prepared and published annually by the Central Statistical Office (CSO). Similarly, at state-level, the State Domestic Product estimates are prepared annually by the State Directorate of Economics and Statistics (DES). The state DES is the nodal agency for the coordination of statistical activities in the state.

3.54. DES annually estimates the State Domestic Product (SDP) using the concepts and methodology approved by the System of National Accounts (SNA) of the international agencies and finalize after the reconciliation with CSO.

3.55. Like GDP, SDP is the monetary value of all the goods and services produced within the geographical boundaries of the state, without duplication, within a given period of time, generally a year. The goods cover all possible items like agricultural crops, livestock products, fisheries, forest products, manufacture of materials in the registered and unregistered sectors, construction of buildings, roads etc. Services cover medical and educational services, domestic services, hotels, restaurants, trade, transport and public services etc.

3.56. Conceptually, the estimates of State Income can be prepared by adopting two approaches, namely, income originating and income accruing. In the income originating approach, the measurement corresponds to income originating to the factors of production physically located within the geographical boundaries of the state and represents gross/net value of goods and services produced within the state. On the other hand, the income accruing approach relates to the income accruing to the normal residents of a state. Since this measures the income that become available to the residents of a state, it provides a better measure of welfare of the residents of the state.

3.57. However, for compiling the State Domestic Product (SDP) estimates by income accruing approach one needs data on flows of factor incomes to/from the boundaries of state i.e. on inter-state flows as well as flows to/from abroad. Due to lack of availability of these data, presently, the estimates of SDP are compiled by the respective DES in the states following the income originating approach. Thus the current concept of compiling the Gross/Net SDP is similar to that of compiling the GDP/NDP of the entire economy i.e., measuring the volume in monetary terms, the total value of goods and services produced within the geographical boundary of the state.

3.58. The general methodology for compiling the estimates of state income is to first compile the estimates at disaggregated level for each economic activity and then aggregating them for the whole region/state. The estimates for commodity producing sectors like agriculture, forestry, fishing, mining &

quarrying, manufacturing, etc. are prepared using the production approach i.e. measuring the value of output and deducting there from the cost of material inputs used in the process of production.

3.59. In the services sectors (non-public segment) like trade, transport, hotels & restaurants etc., the estimates are prepared by income approach, specifically, by multiplying the value added per worker by the number of workers, for the benchmark estimates and extrapolating these benchmark estimates with suitable indicators for the annual estimates. The information on value added per worker is obtained from the relevant Enterprise Surveys conducted for the purpose.

3.60. The estimates of workforce are obtained using the results of large-scale sample surveys on employment & unemployment conducted by National Sample Survey Organisation (NSSO) and decennial population census carried out in the country by the Office of Registrar General of India (RGI) and Census Commissioner.

3.61. In the preparation of State TSA, the SDP accounts are used to arrive at the supply side information of the tourism industries, which here are 20 in number. While the SDP data are not available for all of these industries, the national level ratios are used to disaggregate the available data.

**Table 3.3: State GDP accounts for Gujarat, 2009-10 (Rs. lakh)**

	At current prices	GVO – FC	IC – PP	GVA – FC	GVA – others
1	Total agriculture and livestock	7448836	1743477	5807551	102192
2	Forestry and logging	635571	99149	536422	
3	Fishing	369156	74372	294784	
4	Mining	1466788		1018286	
5	Meat, fish, fruits, vegetables and oils	2155501	2015823	139678	7804
6	Dairy products	985908	839554	146354	10442
7	Grain mill products	763862	707098	56764	52051
8	Other food products	682136	599844	82292	40250
9	Beverages	36596	27784	8812	10344
10	Tobacco products	93593	81975	11618	20664
11	Spinning, weaving and finishing of textiles	4162562	3601588	560974	427305
12	Wearing apparel	88437	68036	20401	43615
13	Leather & fur products	10331	6866	3465	16523
14	Wood and wood products	154923	135093	19830	86676
15	Furniture	25715	20598	5117	41152
16	Paper and printing etc	746832	629282	117550	18568
17	Rubber, petroleum products etc.	24888351	22169695	2718656	20532
18	Chemical and chemical products	10775154	7840210	2934944	39537
19	Non-metallic products	1811164	1279453	531711	113160
20	Basic metals	5292573	4052107	1240466	19821
21	Recycling	212669	210099	2570	274
22	Metal products and machinery	4077156	3163179	913977	531810
23	Electrical machinery	1466212	1184991	281221	38036
24	Other manufacturing	2023648	1671968	351680	686999
25	Transport equipment	1415415	1023160	392255	47671
	<b>Total Manufacturing</b>	<b>61868738</b>	<b>51328403</b>	<b>10540335</b>	<b>2273234</b>
26	Construction			815234	
27	Electricity, gas and water supply			1253444	
28	Railway transport services			277908	
29	Land transport including via pipeline			1655175	
30	Water transport			158000	
31	Air transport			22951	
32	Supporting and aux. tpt activities			128627	
33	Storage and communication			14126	536562
34	Trade			6547781	
35	Hotels and restaurants			663029	
36	Banking and insurance			1869801	
37	Real estate and business services			2713213	
38	Education and research			1072346	
39	Medical and health			437730	
40	Other services			609712	
41	Public administration			1359862	
42	Total all industries				

Source: CSO

Note: Gross Value Added - Others relate to Irrigation component in the case of "Total Agriculture and Livestock", Unregistered value added in the case of manufacturing industries and Communication in the case of "Storage and Communication.

## 4. METHODOLOGY

### Tourism Satellite Account

4.1. The 10 tables that make up the Tourism Satellite Account are the key to estimate the economic contribution of tourism in the economy. At national level, these tables to be prepared in a standard format as recommended by WTO in the TSA:RMF 2008, enable international comparisons, among countries. However, each country has the flexibility to decide on the most adequate format for taking into account its tourism reality and scope of available data.

4.2. At regional level, no standard recommendations are made by WTO in either TSA:RMF 2008 or in IRTS-2008. However, IRTS-2008 does mention the importance of developing the TSAs at regional level as special features of tourism prevail across the regions of a country.

4.3. Essentially, preparation of a state TSA requires the following:

- Statistics on expenditure made by visitors on different products and services within the state.
- Statistics on supplies from the domestic production and imports (which include supplies/imports from other states) to meet these purchases of tourists.
- Confrontation of the two sets of statistics in the national accounting framework through the supply and use tables so that supplies from domestic production and imports match with the expenditures made by tourists and tourism ratios are developed.
- Estimate the value added out of the domestic production that is involved in supplying the products to tourists' purchases.

### Expenditure or demand side data

4.4. **Expenditure by visitors on different products and services** can be obtained only from Domestic Tourism Survey (DTS) as International Passenger Survey (IPS) did not capture any data at state level. However, unlike national TSA, in which Domestic Tourism Expenditure relates to only one type of tourism activity (that is, within country of reference), state TSAs require data (apart from those related to foreign countries) from DTS on three types of tourism activities:

- i. Within state movement – this information feeds into Domestic Tourism Expenditure
- ii. Movement from the state of reference to any other state – this is required for Outbound Tourism Expenditure
- iii. Movement from other states to the state of reference – this is required for Inbound Tourism Expenditure.

### Production or Supply side data

4.5. **Data on supplies from domestic production** are obtained from State Departments of Economic and Statistics. Using these data and national level ratios, the following tables are prepared for the supply account of each state TSA:

- Supply table at basic prices
- Use table at purchaser's prices
- Input-Output table for indirect effects

4.6. As of now, in India, Supply and Use Tables are not at all compiled at state level. This is because no data on imports to the state from other states or from abroad are available. **Hence the confrontation of the demand side data and the supply side data is not possible at state level.** Therefore other approaches have to be followed to prepare the state TSA and to estimate the value added on account of the tourism activity.

4.7. Following are two possible approaches to compile regional/state TSAs:

- The interregional approach or top-bottom approach, which is common to all the regions of the national territory and is based on and intimately linked to the System of National Accounts. It is an approach that relies on the existence of a National TSA and the availability in each region of uniform tourism information for each of the tables and aggregates to be regionalized;
- The regional approach or bottom-top approach, which entails the development of a specific TSA for any given region, in which specific situations and differentials may also be identified for important sub-regional territories, provided there is sufficient information on them.

4.8. Of the two possible approaches for compiling State TSAs, namely, (i)

regionalisation or top-down and (ii) regional or bottom-up, adoption of one or both approaches depends upon the availability of information that is required to compile the TSAs. It is, therefore, necessary to look at the availability of information for state TSAs in respect of both the approaches. This is presented in the following table:

**Table 4.1: Availability of data for compiling State TSAs according to different approaches**

Approach	Data requirement	Data availability
Regional (bottom-up)	Statistics on expenditures made by visitors on different products within the state	Data is available from the DTS, 2008-09 and IPS, 2010-11 (subject to some assumptions)
	Statistics on supplies from the domestic production and imports (which include from other states) to meet these purchases of tourists	<ul style="list-style-type: none"> <li>- Data on supplies from domestic production is available</li> <li>- Data on imports at state level is not available</li> </ul>
	Confrontation of the two sets of statistics in the national accounting framework through the supply and use tables so that supplies from domestic production and imports match with the expenditures made by tourists	<ul style="list-style-type: none"> <li>- In the absence of data on imports, it is not possible to compile SUT at state level.</li> <li>- However, State SUT can be constructed for domestic supplies and total of capital formation and net exports as other final demand in the use table.</li> <li>- This SUT though not suitable for TSA, can be used for estimating indirect effects of tourism consumption, value added and employment.</li> </ul>
	Estimate value added out of the domestic production that is involved in supplying products for tourists' purchases	<ul style="list-style-type: none"> <li>- Not possible, as how much of domestic production is able to meet the tourists' demand is not known in the absence of information on imports.</li> <li>- However, it is possible to compute GVATI and TDGVA using national tourism ratios of output of industries, as suggested in the TSA:RMF 2008.</li> </ul>
Regionalisation (top-down)	National TSA and tourism ratios by products and industries	Available
	State level tourism consumption	Available
	State level estimates of output and value added by tourism and other industries	Available
	State level estimates of employment by tourism and other industries	Available

Source: NCAER computation

*Compilation of  
State TSAs*

4.9. From the above table, it is evident that without the supply table that includes imports from other states and countries, it is not possible to compile regional TSAs in the same manner as in the case of national TSA and in particular the estimation of key aggregates of TDGVA and TDGDP. However, with the information that is available at State level in India, it is possible to compile TSA Tables 1 to 5 and 7 without much difficulty, though some assumptions would need to be made for this. Also, Tables 8 and 9 on Tourism Gross Fixed Capital Formation and Tourism Collective Consumption respectively cannot be included in the State TSAs due to the non-availability of these data at state level. Even at national level, the TSA:RMF 2008 placed these compilations under research agenda and did not recommend their compilations, although NCAER included experimental compilations of these two tables in the all India TSA, 2009-10. Each of these tables is described in the following sections of this chapter.

4.10. Before presenting the description of the TSA Tables, it is important to mention that TSA:RMF 2008 recommends certain set of activities and products to be included while compiling the TSA. While some of the activities have been specified distinctly, some are recommended to be country-specific. Accordingly, a comprehensive set of activities and products were identified in the compilation of national as well as state TSAs. Both the recommended and the adopted classifications separately for products and activities are shown in the table below.

**Table 4.2: Products recommended in TSA: RMF 2008 Vs. Products included in TSA, 2009-10**

Products Recommended in the TSA: RMF 2008	Products Used for TSA of India 2009-10
Product	Product
1 Accommodation services for visitors	20 Hotels
2 Food and beverage serving services	21 Restaurants
3 Railway passenger transport	15 Railway passenger transport services
4 Road passenger transport services	16 Land passenger transport including via pipeline
5 Water passenger transport services	17 Water passenger transport
6 Air passenger transport services	18 Air passenger transport
7 Transport equipment rental services	23 Renting of transport equipment
8 Travel agencies and other reservation services	19 Tourism related supporting and auxiliary transport activities
9 Cultural services	24 Cultural and religious services
10 Sports and recreational services	25 Sporting and recreational services
11 Country-specific tourism characteristic goods	22 Medical and health
12 Country-specific tourism characteristic services	6 Processed food products
	7 Beverages
	8 Tobacco products
	9 Readymade garments
	10 Printing and publishing
	11 Leather footwear
	12 Travel related consumer goods
	13 Soaps and cosmetics
14 Gems and jewellery	

Source: NCAER computation

### Inbound Tourism Expenditure

4.11. Inbound Tourism Expenditure forms Table 1 of the TSA. At regional or state level, inbound tourism expenditure comprises of expenditure incurred by visitors from other countries as well as by those from other states of the same country. These expenditures are incurred within the state of reference on tourism characteristic and tourism connected products and services. An inbound tourism trip refers to the travel of a visitor from the time of arriving in a country/state to the time of leaving that country/state.

*Inbound  
Tourism  
Expenditure  
by  
international  
tourists*

4.12. The data on Inbound tourism expenditure or the expenditure by international tourists in the state of reference are not available and therefore, were estimated using the pattern of expenditure observed at national level. For national level expenditures, data were derived from the International passenger Survey (IPS), 2010-11 conducted by the Indian Statistical Institute (ISI), Kolkata and are reported in “Second Tourism Satellite Account of India, 2009-10”.

4.13. The per-tourist pattern of expenditure by tourism characteristic products and tourism connected products observed at national level was applied on number of inbound tourists in state to arrive at the state-level estimates of expenditures. Hence the per-tourist expenditure by type of international tourists remains the same as observed for India.

4.14. The state-level inbound tourism also includes tourism activities of visitors from other states of India to the state of reference. The data on their expenditures were obtained from the DTS, 2008-09. Data on item-wise expenditure incurred during all the overnight trips originating from any state (other than the state of reference, that is, Gujarat) and for which main destination was the state of reference (Gujarat), were collected to arrive at this component of inbound tourism expenditure. These expenditures were estimated by the leading purpose of the trip. The procedure of estimation of these expenditure is given in Appendix.

4.15. It must be noted that while the statistics provided in Chapter 3 were with respect to visitor-trips, this chapter’s statistics, obtained from DTS, will pertain to trips as the expenditure data were collected for entire trip irrespective of the number of visitors/tourists travelling in that trip.

*Inbound  
Tourism  
Expenditure  
by domestic  
tourists  
belonging to  
states other  
than GUJARAT*

4.16. Since the reference period of the DTS differs with the reference period of TSA, price adjustments to the source data were carried out.

4.17. Also, it is observed that the primary household surveys tend to underestimate the value of consumption expenditure. This observation comes from the notable underestimation of value of consumption expenditure (both at aggregate level and for each item) that is derived from the NSSO’s large sample survey on “Consumption Expenditure” when compared with the Private Final Consumption Expenditure (PFCE) as reported in the CSO’s National Accounts of Statistics (NAS). The reason behind underestimation could be the inability to recall the expenses and in some cases reluctance to report the actual expenses.

4.18. Hence, adjustment to the source data has been made to benchmark the data with the private final consumption expenditure of national accounts.

4.19. The underestimation of DTS value of expenditure is corrected by applying the adjustment factor on value of expenditure of each item. The adjustment factor, for each item, is obtained by taking the ratio of PFCE expenditure and NSSO expenditure. These factors are assumed to be the same as those at national level (refer to “Second Tourism Satellite Account of India, 2009-10). These adjustment factors for the tourism specific goods and services are given in the Table 4.3.

4.20. An adjustment factor of 1.64 in the case of “Hotels” would mean that the NAS value of expenditure incurred on “Hotels” services is 1.64 times what is reported in the NSSO survey. Hence, for each item, the value of expenditure obtained through the DTS is multiplied by the corresponding adjustment factor.

*Inbound  
tourism  
expenditure*

4.21. The inbound tourism expenditure incurred by international tourists, that incurred by tourists of other states of India and the TSA Table 1, obtained from these two tables is presented in Chapter 5 on Tables and Accounts.

**Table 4.3: Consumption Expenditure Adjustment Factors**

<b>Industries</b>	<b>Adjustment factors</b>
<b>A 1. Tourism characteristic products</b>	
1 Accommodation services/Hotels	1.64
2 Food and beverage serving services/Restaurants	1.64
3 Railway passenger transport services	6.90
4 Road passenger transport services	8.86
5 Water passenger transport services	13.07
6 Air passenger transport services	6.81
7 Transport equipment rental services	8.63
8 Travel agencies and other reservation services/ Supporting and auxiliary transport activities	8.63
9 Cultural and religious services	0.50
10 Sports and other recreational services	0.50
11 Health and medical related services	1.81
<b>A.2 Tourism connected products</b>	
12 Readymade garments	2.56
13 Processed food	1.49
14 Tobacco products	5.28
15 Beverages	3.04
16 Travel related consumer goods	1.74
17 Footwear	3.05
18 Soaps, cosmetics and glycerine	0.70
19 Gems and jewellery	1.45
20 Books, journals, magazines, stationery etc.	1.41

Source: NCAER computation

*Key Findings*

4.22. As mentioned earlier, for regional TSA, inbound tourism refers to the tourist activities of all the visitors visiting the state of reference from across both the international border as well as the state border.

4.23. According to the India Tourism Statistics, Gujarat received a total of 1,30,739 inbound tourists from other countries during 2009-10. Besides, the state played host to 36.8 lakh inbound trips from the other states of India. In terms of visitor-trips, this number stood at 49.7 lakh.

4.24. The per-cent distribution of trips by purposes is almost the same as that of visitor-trips (as given in Chapter 3). Of the total trips undertaken in the state from the other states, 61.7 per cent were social trips, followed by 12.6 per cent religious trips and 11.1 per cent business trips.

4.25. The following table presents a state-wise comparison of the per-cent distribution of trips undertaken in the state from the other states by purposes of travel (refer to Table 4.4).

4.26. The average per-trip expenditure of inbound tourists from other states was Rs. 11,231. However, among the various purposes of travel, shopping trip turns out to be the most expensive, with per-trip expenditure of Rs. 22,337 (Figure 4.1).

4.27. The state-wise average per-trip expenditure of inbound tourists from other states is given in the Table 4.5.

4.28. The per cent distribution of total expenditure by items of expenditure reveals that the passenger transport services (comprising transport by railway, road, water, air and transport rental services) account for 73.9 per cent of the total expenditure (Figure 4.2).

4.29. The share of expenditure incurred on passenger transport services is the maximum across all the purposes of travel except for health-related and shopping-related trips, highest being in social trips, at 79.8 per cent.

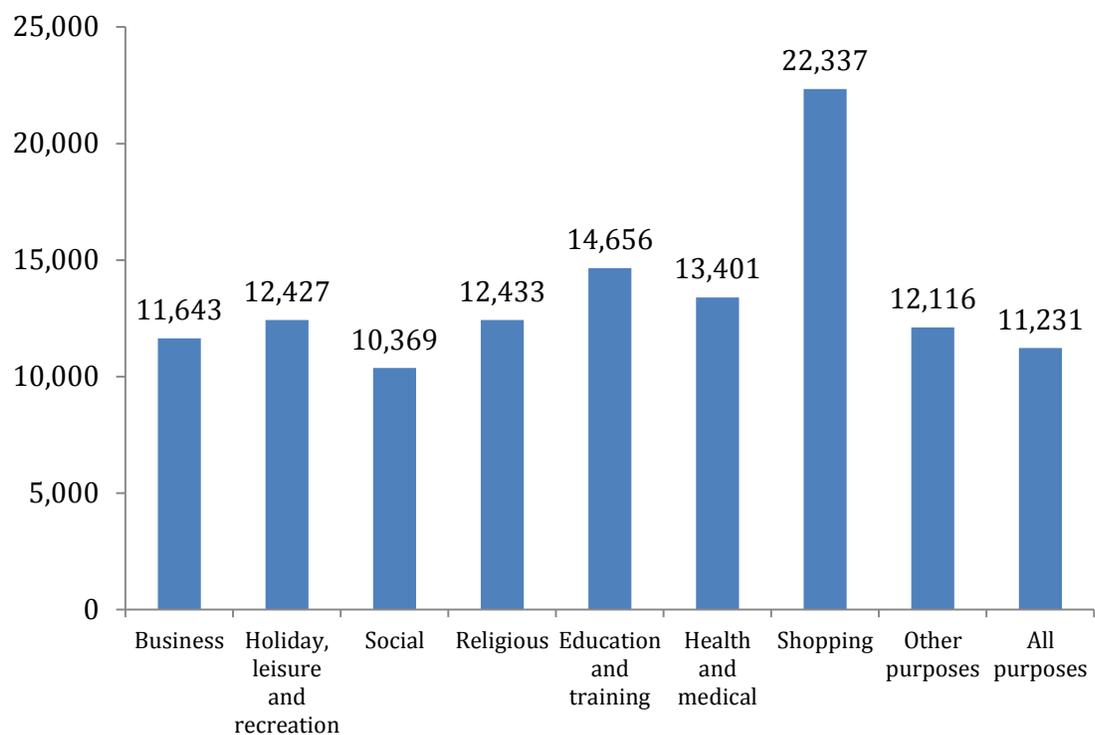
4.30. For medical or health related trips, the share of expenses on health and medical related services was the highest at 55.8 per cent and in case of trips undertaken for shopping, the share of expenses on tourism connected services was the highest and accounted for as much as 84.8 per cent of total expenditure (see Figure 4.2).

**Table 4.4: State-wise per-cent distribution of trips undertaken in the state from other states, by purposes of travel**

	Business	Leisure	Social	Religious	Education & training	Health & medical	Shopping	Others	Total
Andhra Pradesh	3.8	6.6	35.3	47.9	1.1	3.6	0.0	1.7	100.0
Arunachal Pradesh	6.7	4.0	60.9	28.4	0.0	0.0	0.0	0.0	100.0
Assam	9.5	4.3	46.4	5.0	3.5	13.1	2.5	15.0	100.0
Bihar	2.0	5.2	74.3	8.5	1.4	6.5	0.1	2.1	100.0
Chandigarh	2.1	5.7	55.9	2.4	5.5	21.3	0.1	7.1	100.0
Chhattisgarh	19.8	4.5	57.7	15.7	0.8	1.3	0.0	0.2	100.0
Dadra & Nagar Haveli	0.0	0.0	100.0	0.0	0.0	0.0	0.0	0.0	100.0
Daman & Diu	0.0	45.1	21.2	33.7	0.0	0.0	0.0	0.0	100.0
Delhi	7.9	5.1	59.7	2.9	5.7	5.2	1.6	11.9	100.0
Goa	15.6	37.6	14.4	12.9	15.9	0.0	0.0	3.6	100.0
<b>Gujarat</b>	<b>11.1</b>	<b>1.9</b>	<b>61.7</b>	<b>12.6</b>	<b>1.1</b>	<b>6.4</b>	<b>0.9</b>	<b>4.4</b>	<b>100.0</b>
Haryana	5.2	2.1	76.7	5.8	0.3	6.7	0.0	3.1	100.0
Himachal Pradesh	2.0	9.9	35.7	49.1	2.5	0.6	0.0	0.2	100.0
Jammu & Kashmir	1.0	10.1	21.3	60.6	4.0	0.3	0.0	2.6	100.0
Jharkhand	3.0	1.7	45.9	39.6	1.3	5.0	0.0	3.5	100.0
Karnataka	8.9	4.8	49.8	20.4	3.8	2.6	0.0	9.7	100.0
Kerala	1.4	4.9	62.9	27.4	0.1	2.6	0.0	0.7	100.0
Lakshadweep	0.0	21.3	72.0	0.0	0.0	6.7	0.0	0.0	100.0
Madhya Pradesh	2.0	0.6	73.9	17.4	2.1	1.8	0.0	2.2	100.0
Maharashtra	11.8	7.7	42.9	25.3	1.4	7.9	0.3	2.8	100.0
Manipur	41.2	0.0	52.7	1.6	0.0	4.6	0.0	0.0	100.0
Meghalaya	11.7	23.2	47.1	3.7	2.0	0.2	1.0	11.0	100.0
Mizoram	2.1	53.7	31.7	1.4	3.1	8.1	0.0	0.0	100.0
Nagaland	43.9	1.7	12.0	3.0	0.2	36.2	0.0	2.9	100.0
Orissa	15.8	15.9	39.8	12.8	0.2	8.9	0.4	6.2	100.0
Pondicherry	0.0	3.7	70.9	14.4	1.0	7.9	0.0	2.1	100.0
Punjab	3.9	3.4	72.7	8.3	1.2	4.4	0.0	6.2	100.0
Rajasthan	2.9	2.9	50.2	34.8	1.6	4.9	0.2	2.3	100.0
Sikkim	8.8	52.9	12.7	12.1	5.6	0.0	0.0	7.9	100.0
Tamil Nadu	6.2	6.1	46.1	26.9	1.6	7.0	0.1	6.0	100.0
Tripura	2.3	9.4	72.0	0.0	0.0	0.0	0.0	16.3	100.0
Uttar Pradesh	2.6	2.6	69.6	18.4	1.1	4.2	0.3	1.1	100.0
Uttaranchal	2.5	8.2	26.5	57.5	0.9	1.3	0.0	3.0	100.0
West Bengal	9.9	9.2	53.7	8.3	1.2	12.5	0.4	4.8	100.0
<b>All India</b>	<b>5.5</b>	<b>5.2</b>	<b>54.8</b>	<b>22.8</b>	<b>1.9</b>	<b>5.2</b>	<b>0.3</b>	<b>4.2</b>	<b>100.0</b>

Source: NCAER computations

**Figure 4.1: Average per-trip expenditure incurred in inbound trips from other states to Gujarat**



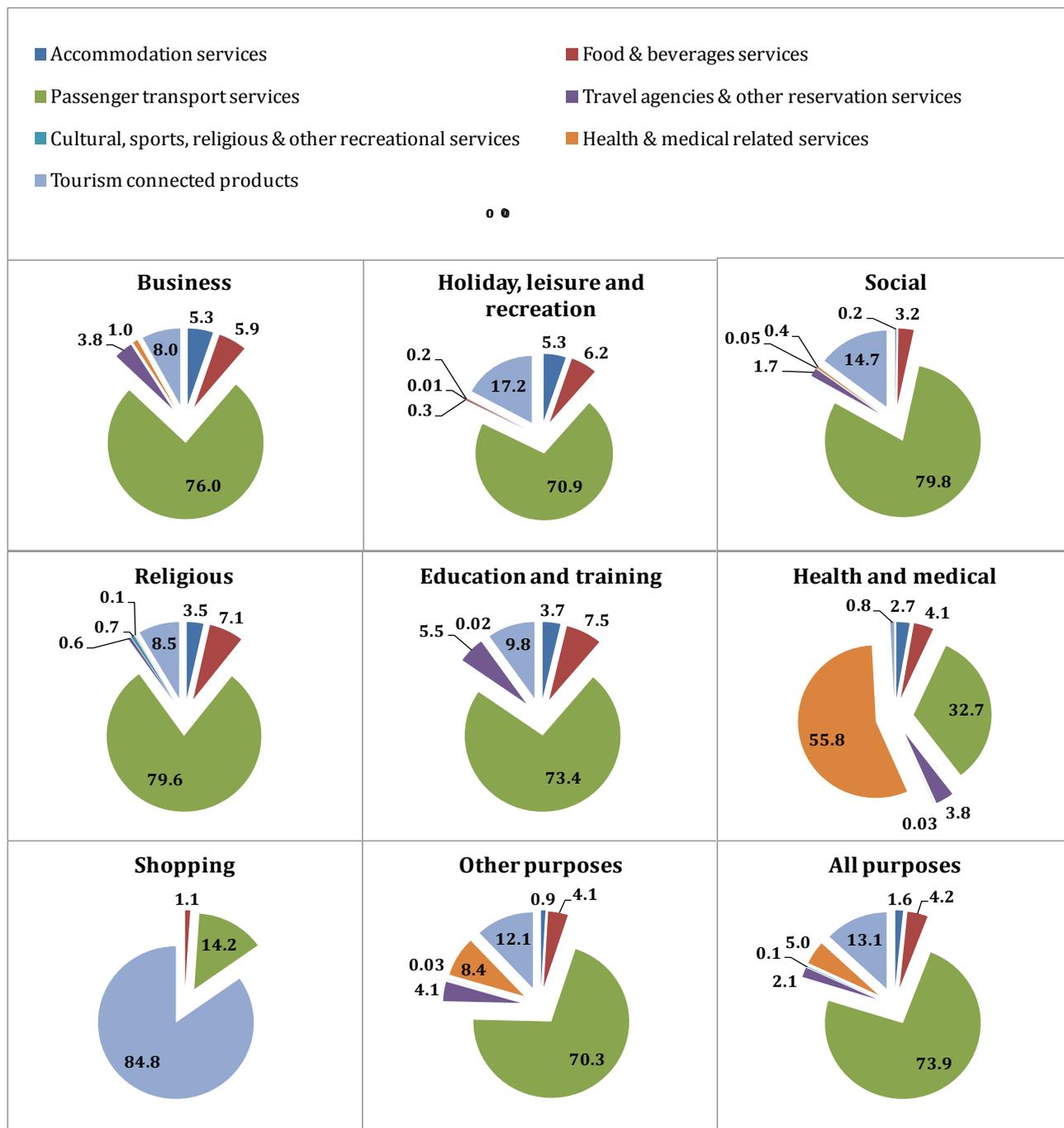
Source: NCAER computations

**Table 4.5: State wise per-trip expenditure (Rs.) by purpose of travel (Inbound Tourism Consumption) (package + non-package)**

States	Business	Leisure	Social	Religious	Education & training	Health & medical	Shopping	Other	All
Andhra Pradesh	25,155	7,312	10,981	12,277	17,049	23,374		16,585	12,494
Arunachal Pradesh	77,445	57,008	7,885	11,095					15,434
Assam	22,893	22,673	10,132	10,639	13,085	22,776	21,652	9,632	13,905
Bihar	8,919	11,203	7,544	26,669	47,181	9,504	1,019	6,607	10,059
Chandigarh	9,183	7,762	6,578	1,11,434	5,263	12,360	22,116	7,379	10,437
Chhattisgarh	1,51,295	12,804	7,009	4,241	10,477	11,208		13,362	35,513
Dadra & Nagar Haveli			1,598						1,598
Daman & Diu		10,047	4,107	1,808					6,013
Delhi	16,246	14,524	9,792	7,937	14,874	24,084	5,601	5,991	11,009
Goa	27,895	31,113	22,280	39,076	6,191			35,766	26,564
<b>Gujarat</b>	<b>11,643</b>	<b>12,427</b>	<b>10,369</b>	<b>12,433</b>	<b>14,656</b>	<b>13,401</b>	<b>22,337</b>	<b>12,116</b>	<b>11,231</b>
Haryana	7,790	14,058	8,898	2,844	1,592	17,192		9,398	9,142
Himachal Pradesh	6,872	44,124	7,446	5,508	1,053	5,115		14,722	9,961
Jammu & Kashmir	8,289	42,953	7,936	21,861	10,363	20,171		5,135	19,990
Jharkhand	3,992	12,294	5,180	6,870	2,985	4,220		6,549	5,901
Karnataka	8,179	17,470	10,961	11,480	21,101	13,866	62,703	23,410	12,795
Kerala	9,524	39,241	6,547	11,346	10,481	23,886		69,728	10,410
Lakshadweep									10,079
Madhya Pradesh	6,516	22,825	5,912	7,450	6,774	9,388		4,497	6,347
Maharashtra	25,643	20,747	13,439	17,835	16,220	8,839	25,282	19,208	16,419
Manipur	11,082		13,732	3,422		17,256			12,637
Meghalaya	10,585	22,641	5,820	20,262	7,513	39,671	45,184	13,943	12,221
Mizoram	15,613	92,092	13,411	4,533	20,021	41,077			58,015
Nagaland	4,016	7,212	7,475	11,179	10,748	2,767		14,593	4,571
Orissa	3,462	27,256	7,818	24,437	32,331	12,695	1,997	3,484	12,521
Pondicherry		59,676	2,881	3,297	678	13,095		4,455	5,871
Punjab	13,675	23,679	5,536	6,867	15,109	13,415		6,112	7,080
Rajasthan	45,920	86,102	8,552	8,775	17,755	8,299	29,930	6,297	12,126
Sikkim	11,487	39,995	24,946	3,96,797	5,489			11,768	74,521
Tamil Nadu	9,642	31,433	8,066	12,990	8,288	23,416	13,298	8,698	12,030
Tripura	34,927	19,580	7,069					8,565	9,132
Uttar Pradesh	11,473	26,750	8,022	6,501	8,551	6,046	6,943	5,589	8,218
Uttaranchal	6,562	29,137	9,194	9,705	18,717	6,849		20,241	11,452
West Bengal	14,373	14,447	24,618	15,712	24,332	9,770	12,766	8,543	19,239
<b>All India</b>	<b>19,229</b>	<b>26,461</b>	<b>8,781</b>	<b>11,497</b>	<b>14,230</b>	<b>14,142</b>	<b>12,419</b>	<b>11,177</b>	<b>11,394</b>

Source: NCAER computations

**Figure 4.2: Percentage distribution of Inbound Tourism Expenditure (incurred by visitors from other states) by products for different purposes of travel – Gujarat**



Source: NCAER computations

### Domestic Tourism Expenditure

4.31. TSA Table 2 focuses on domestic tourism by products and by purpose of travel. This table presents the Domestic Tourism Consumption which refers to the tourism consumption of a resident visitor within the economy of reference. At state level, this table refers to tourists from within the state.

4.32. The domestic tourism expenditure was derived from the Domestic Tourism Survey (DTS), conducted by the National Sample Survey Organisation (NSSO) during 2008-09. The detailed information was collected on the expenditure incurred by tourists on a detailed set of items which were mapped with the tourism characteristic and tourism connected (together called tourism specific) products and services.

4.33. The procedure of estimation is given in Appendix.

4.34. As done for other states' inbound tourism expenditure, domestic tourism expenditure data was also price-adjusted to benchmark them for the TSA reference year. Also, the underestimation of these data is corrected by applying the adjustment factors (Table 4.3) on value of expenditure for each item.

4.35. The TSA Table 2 is given in Chapter 5 on Tables and Accounts.

### Key Findings

4.36. In all, 4.02 crore domestic or intrastate trips were undertaken in 2008-09 in Gujarat.

4.37. The per cent distribution of intrastate trips by purpose of travel was somewhat similar to that of interstate trips. While maximum number of trips (61.7 per cent of the total, as given in Table 4.4) undertaken from other states to the state of reference were social trips, this proportion stood at 76 per cent in case of intrastate domestic trips, as shown in Table 4.6 which presents the state-wise distribution of intra-state trips by purposes of travel.

4.38. Among the total intrastate domestic trips, 15.1 per cent were religious trips and only 1.7 per cent were leisure trips.

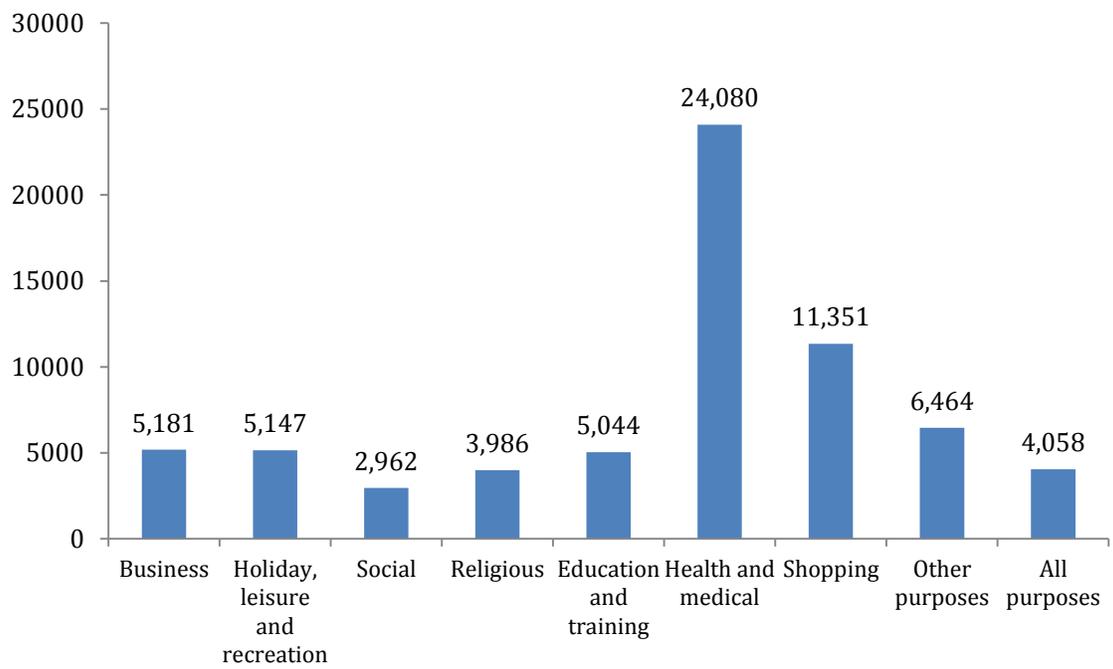
4.39. The average per-trip expenditure incurred during domestic trips in Gujarat was Rs. 4,058. The per-trip expenditure is the highest for health and medical related trips (Rs. 24,080) followed by shopping trips (Rs 11,351) (see Figure 4.3).

**Table 4.6: State-wise per-cent distribution of trips undertaken within the state, by purposes of travel**

	Business	Leisure	Social	Religious	Education & training	Health & medical	Shopping	Others	Total
A & N Islands	4.3	5.4	67.4	2.7	3.8	9.5	1.8	5.1	100.0
Andhra Pradesh	2.3	3.6	74.0	8.7	0.6	7.0	0.1	3.7	100.0
Arunachal Pradesh	10.6	1.4	35.1	4.8	5.5	12.3	13.8	14.9	100.0
Assam	8.6	2.4	65.1	6.3	1.9	10.3	1.1	4.2	100.0
Bihar	4.5	1.4	72.0	7.9	1.1	10.2	0.9	1.7	100.0
Chandigarh	0.0	0.0	100.0	0.0	0.0	0.0	0.0	0.0	100.0
Chhattisgarh	2.0	2.9	81.0	5.8	1.2	4.3	0.8	1.9	100.0
Dadra & Nagar Haveli	0.3	0.3	97.8	0.2	0.0	1.4	0.0	0.0	100.0
Daman & Diu	0.0	0.0	99.3	0.0	0.0	0.0	0.0	0.7	100.0
Delhi	0.0	1.2	92.9	0.2	0.0	4.7	0.0	1.0	100.0
Goa	0.0	1.5	76.5	19.4	0.1	2.3	0.2	0.0	100.0
<b>Gujarat</b>	<b>1.3</b>	<b>1.7</b>	<b>76.0</b>	<b>15.1</b>	<b>1.4</b>	<b>3.9</b>	<b>0.1</b>	<b>0.7</b>	<b>100.0</b>
Haryana	0.8	0.1	86.9	2.8	0.5	5.6	0.0	3.2	100.0
Himachal Pradesh	3.0	2.2	78.4	4.3	1.1	5.3	1.5	4.2	100.0
Jammu & Kashmir	2.3	1.7	83.9	3.7	2.0	3.0	0.7	2.8	100.0
Jharkhand	2.4	3.6	76.4	3.0	1.8	9.7	0.7	2.5	100.0
Karnataka	2.1	2.6	76.3	13.0	0.5	3.9	0.1	1.6	100.0
Kerala	1.9	2.2	69.8	7.9	1.1	9.9	0.0	7.2	100.0
Lakshadweep	9.9	6.0	49.8	4.3	1.5	0.7	0.0	27.7	100.0
Madhya Pradesh	2.3	1.4	81.6	7.2	0.6	5.0	0.3	1.7	100.0
Maharashtra	1.6	1.8	70.8	15.4	0.7	7.4	0.4	1.8	100.0
Manipur	13.4	2.5	45.5	7.0	2.7	11.4	10.9	6.2	100.0
Meghalaya	9.4	5.0	55.9	7.8	1.9	13.6	1.6	4.7	100.0
Mizoram	23.2	1.2	50.2	5.7	3.2	5.5	6.3	4.6	100.0
Nagaland	19.0	4.2	34.1	9.3	6.9	3.8	2.1	20.6	100.0
Orissa	3.1	4.2	74.1	4.8	0.8	8.1	1.2	3.7	100.0
Pondicherry	0.0	10.9	66.7	5.4	6.9	9.3	0.0	0.8	100.0
Punjab	1.8	0.2	79.2	11.8	0.8	4.1	0.0	2.2	100.0
Rajasthan	1.3	1.0	82.4	6.2	1.2	4.8	0.2	2.9	100.0
Sikkim	6.7	0.7	51.7	10.9	3.6	10.4	0.8	15.3	100.0
Tamil Nadu	1.5	4.1	74.4	14.8	0.4	3.6	0.1	1.2	100.0
Tripura	0.2	5.4	82.3	1.1	0.4	7.5	0.1	2.5	100.0
Uttar Pradesh	1.8	1.5	82.5	5.0	1.1	4.9	0.3	2.8	100.0
Uttaranchal	4.3	0.5	76.0	4.6	1.1	3.5	3.7	6.3	100.0
West Bengal	2.4	5.8	76.0	3.6	0.6	8.8	0.1	2.8	100.0
Total	2.2	2.4	76.6	8.4	0.9	6.3	0.4	2.8	100.0

Source: NCAER computations

**Figure 4.3: Average per-trip expenditure incurred in intrastate domestic trips in Gujarat**



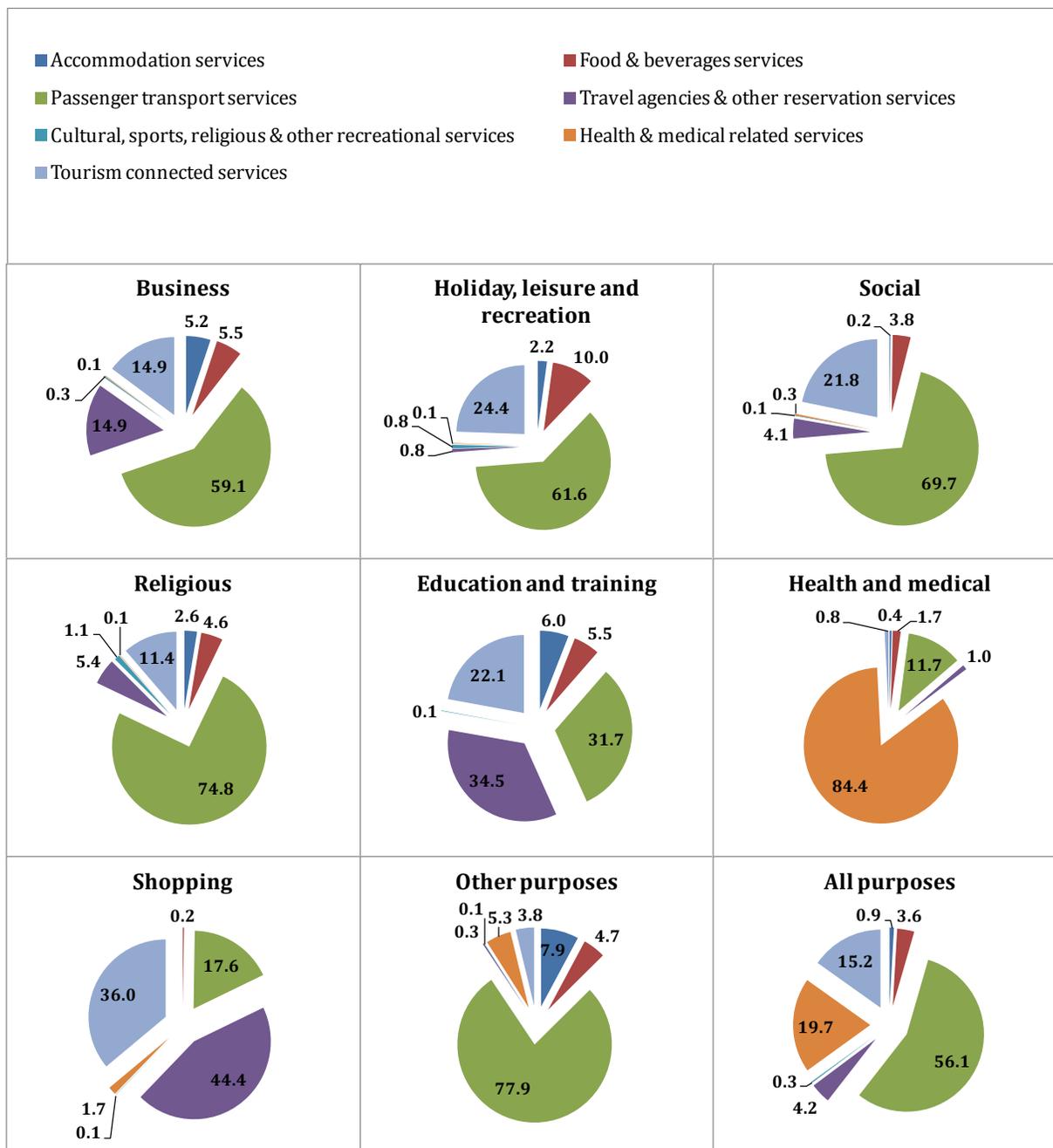
Source: NCAER computations

**Table 4.7: State wise per-trip expenditure (Rs.) by purpose of travel (Domestic Tourism Consumption) (package + non-package)**

States	Business	Leisure	Social	Religious	Education & training	Health & medical	Shopping	Other	All
A & N Islands	7,746	4,309	3,671	4,929	3,437	6,732	29,033	5,413	4,753
Andhra Pradesh	2,807	2,486	2,089	6,141	4,224	9,705	5,342	4,748	3,121
Arunachal Pradesh	13,523	10,268	7,451	4,672	9,984	8,206	6,089	7,828	8,112
Assam	4,351	5,508	2,767	2,742	4,800	4,451	4,555	3,483	3,231
Bihar	3,308	1,596	1,626	1,532	1,412	3,222	4,053	1,258	1,871
Chandigarh			2,234						2,234
Chhattisgarh	1,345	2,374	2,187	2,270	2,177	5,627	18,810	1,567	2,444
Dadra & Nagar Haveli	666	3,041	638	2,999		1,279			659
Daman & Diu			1,814					7,189	1,852
Delhi		1,305	1,774	1,991		56,980		2,160	4,347
Goa		8,244	3,914	7,099	1,680	13,242	519		4,806
<b>Gujarat</b>	<b>5,181</b>	<b>5,147</b>	<b>2,962</b>	<b>3,986</b>	<b>5,044</b>	<b>24,080</b>	<b>11,351</b>	<b>6,464</b>	<b>4,058</b>
Haryana	1,446	2,194	2,075	4,850	1,238	9,090	96,270	13,010	2,921
Himachal Pradesh	1,975	1,894	3,326	2,625	3,499	7,772	5,355	3,270	3,490
Jammu & Kashmir	4,058	7,858	1,417	2,538	6,099	6,259	8,532	7,292	2,075
Jharkhand	1,991	3,546	1,994	1,931	3,423	8,384	5,372	2,175	2,720
Karnataka	3,039	15,037	2,650	5,792	5,040	10,729	5,824	4,371	3,742
Kerala	6,116	20,058	1,859	4,592	2,226	12,679	11,530	8,436	4,104
Lakshadweep	8,578	11,701	5,876	9,694	4,977	6,461		2,930	5,830
Madhya Pradesh	2,743	4,136	1,618	2,481	3,533	4,210	3,150	1,931	1,890
Maharashtra	5,555	12,333	3,477	4,842	4,246	8,179	4,563	5,555	4,275
Manipur	8,542	5,440	3,008	3,224	6,252	7,151	7,839	3,593	4,956
Meghalaya	4,402	3,094	2,487	1,378	2,936	4,440	6,029	3,971	3,012
Mizoram	10,418	4,549	4,499	2,842	7,543	14,126	8,392	5,675	6,701
Nagaland	7,127	5,460	4,353	4,893	7,251	7,103	6,806	7,137	5,907
Orissa	2,079	1,897	1,291	4,016	8,480	6,026	2,174	1,711	1,939
Pondicherry		1,132	1,890	667	10,178	3,118		806	2,421
Punjab	3,410	19,774	2,118	3,727	2,074	12,933	9,673	8,596	2,948
Rajasthan	6,102	5,392	2,562	3,108	3,646	14,028	4,623	7,475	3,378
Sikkim	3,996	5,812	3,866	4,547	2,942	6,628	13,064	5,237	4,494
Tamil Nadu	3,120	7,126	2,487	4,530	5,973	20,414	46,751	5,902	3,723
Tripura	3,459	1,265	887	930	1,117	3,297	11,577	2,352	1,140
Uttar Pradesh	1,728	1,876	1,837	2,655	1,872	5,935	6,439	3,265	2,134
Uttaranchal	3,394	5,683	3,639	5,085	4,967	9,015	6,066	2,443	3,923
West Bengal	2,936	3,178	1,337	1,815	3,226	6,814	18,152	3,032	2,059
<b>All India</b>	<b>3,492</b>	<b>5,558</b>	<b>2,184</b>	<b>4,103</b>	<b>3,525</b>	<b>8,761</b>	<b>6,664</b>	<b>4,963</b>	<b>2,976</b>

Source: NCAER computations

**Figure 4.4: Percentage distribution of Domestic Tourism Expenditure (incurred by visitors from within the state) by products for different purposes of travel – Gujarat**



Source: NCAER computations

4.40. The state-wise average per-trip expenditure of domestic tourists from within the state of reference is given in the Table 4.6.

4.41. The per cent distribution of total expenditure by items of expenditure reveals that the passenger transport services (comprising transport by railway, road, water, air and transport rental services) account for 56.1 per cent of the total expenditure.

4.42. When observed by purposes of travel (see Figure 4.4), the share of passenger transport expenses is the highest in most of the trips, except in case of health-related trips, education trips and shopping-related trips. Highest share in total expenditure was contributed by health and medical related services in case of medical trips (84.4 per cent) and travel agencies and other reservation services in case of education-related (34.5 per cent) and shopping-related trips (44.4 per cent).

### Outbound Tourism Expenditure

4.43. TSA Table 3 focuses on outbound tourism. This table presents the tourism expenditure incurred by the resident visitor outside the country of reference on tourism characteristic and tourism connected products and services.

4.44. This expenditure could be either as part of an outbound tourism trip or as part of a domestic trip. Both domestic trip and an outbound trip correspond to the travel between leaving the place of residence and returning. However, a domestic trip has a main destination in the country of residence of the traveller, while an outbound trip has a main destination outside this country.

4.45. In the state TSA tables, the data presented refers to the residents visiting outside the country and the expenditures included here are pre-trip expenditures within the country.

4.46. While trips undertaken outside the territory of the state of reference, to other states within India, also fall under the definition of outbound tourism, but the pre-trip expenditure of such trips is beyond the scope of the Domestic Tourism Survey, 2008-09.

4.47. The DTS-2008-09 conducted by NSSO canvassed the domestic tourists only and no information was collected on outbound tourism. However, a separate survey was conducted by ISI, Kolkata and was a part of IPS. This survey captured the expenditure incurred by outbound tourists within India which includes the pre-trip expenditure, say, on shopping or expenditure

incurred on travelling from place of residence to place of exit to another country and back.

4.48. This expenditure is supposed to be a part of TSA Table 2 but since there are no data available on the recommended TSA Table 3, the outbound tourism expenditure incurred in India (pre-outbound trip) is presented in this table. As mentioned, this information was collected through survey conducted by ISI.

4.49. The procedure followed to compile the estimates is same as for TSA Tables 1 and 2. Since the reference period of the IPS is 2010-11 whereas TSA is prepared for 2009-10, the expenditure data are deflated for 2009-10 using the PFCE deflator.

4.50. Adjustment for benchmarking survey data with the estimates of PFCE has also been carried out for pre-trip expenditures of residents.

4.51. The TSA Table 3 is presented in Chapter 5.

### *Key Findings*

4.52. In all, there were 9,11,436 outbound tourists from Gujarat in 2010-11.

4.53. The per-cent distribution of trips by purposes of travel reveals that highest number of the people (38.2 per cent) travelling abroad travelled for business. This was followed by trips undertaken for social purposes, whose share in total stood at 25.4 per cent and this number for leisure trips stood at 21.2 per cent (Table 4.8).

4.54. As compared to this, only 29.1 per cent of the total outbound tourists at all-India level travelled for leisure.

4.55. On an average, Indians travelled abroad mostly for business, leisure and social purposes, with their shares in total outbound tourists being 32.3 per cent, 29.1 per cent and 21.8 per cent.

4.56. Table 4.9 presents the state wise per-trip expenditure for outbound trips originated from each state.

**Table 4.8: State-wise per-cent distribution of number of Outbound Tourists, by purpose of travel**

States	Business	Leisure	Social	Religious	Education & training	Health & medical	Shopping	Other	All
A & N Islands	36.3	27.9	12.8	0.0	22.6	0.4		0.0	100.0
Andhra Pradesh	23.5	30.4	31.9	0.1	8.2	0.6		5.4	100.0
Arunachal Pradesh	79.5	13.8	4.4	2.3	0.0	0.0		0.0	100.0
Assam	33.1	34.0	11.3	0.0	11.9	0.0		9.6	100.0
Bihar	33.4	36.2	3.9	10.7	10.5	0.0		5.4	100.0
Chandigarh	37.2	33.0	8.3	4.0	13.0	0.0		4.6	100.0
Chhattisgarh	13.8	17.8	1.9	0.0	56.1	0.0		10.4	100.0
Dadra & Nagar	89.1	10.9	0.0	0.0	0.0	0.0		0.0	100.0
Daman & Diu	35.0	23.6	27.4	0.0	5.8	8.2		0.0	100.0
Delhi	33.4	46.6	5.3	0.9	9.3	0.8		3.6	100.0
Goa	34.7	36.7	17.4	1.4	2.8	0.5		6.5	100.0
<b>Gujarat</b>	<b>38.2</b>	<b>21.2</b>	<b>25.4</b>	<b>1.3</b>	<b>7.8</b>	<b>0.1</b>		<b>6.0</b>	<b>100.0</b>
Haryana	32.8	41.5	7.8	0.9	11.3	2.4		3.4	100.0
Himachal Pradesh	42.5	24.9	13.5	0.0	8.8	0.0		10.3	100.0
Jammu & Kashmir	29.7	51.8	7.0	1.6	2.8	2.3		4.8	100.0
Jharkhand	33.3	15.0	18.1	0.0	8.3	0.0		25.3	100.0
Karnataka	47.8	27.1	11.2	0.7	6.6	1.7		4.9	100.0
Kerala	10.2	29.2	42.1	0.8	5.4	4.6		7.8	100.0
Lakshadweep	59.9	0.0	40.1	0.0	0.0	0.0		0.0	100.0
Madhya Pradesh	28.2	48.5	16.4	0.7	1.6	2.0		2.6	100.0
Maharashtra	46.6	26.5	12.9	1.9	9.6	0.7		1.9	100.0
Manipur	48.6	36.4	0.0	0.0	10.2	0.0		4.8	100.0
Meghalaya	21.6	0.0	0.0	0.0	0.0	0.0		78.4	100.0
Mizoram	24.9	1.9	29.9	0.0	18.6	0.0		24.7	100.0
Nagaland	47.6	0.0	22.4	30.0	0.0	0.0		0.0	100.0
Orissa	47.2	32.0	2.8	0.0	7.3	0.0		10.8	100.0
Pondicherry	63.8	27.1	0.0	0.0	0.0	0.0		9.0	100.0
Punjab	32.0	26.3	22.9	0.3	15.4	0.6		2.5	100.0
Rajasthan	24.2	15.1	29.2	9.1	3.6	0.4		18.4	100.0
Sikkim	17.5	20.3	9.5	0.0	12.6	40.1		0.0	100.0
Tamil Nadu	48.0	16.6	12.7	0.4	10.0	1.3		11.1	100.0
Tripura	51.1	6.2	42.6	0.0	0.0	0.0		0.0	100.0
Uttar Pradesh	44.9	28.2	6.0	6.3	4.9	0.7		9.1	100.0
Uttaranchal	13.4	63.3	8.4	4.1	1.9	0.0		8.8	100.0
West Bengal	38.6	26.0	23.6	0.4	4.2	0.0		7.3	100.0
Others	8.1	33.4	58.5	0.0	0.0	0.0		0.0	100.0
<b>All India</b>	<b>32.3</b>	<b>29.1</b>	<b>21.8</b>	<b>1.4</b>	<b>7.9</b>	<b>1.3</b>		<b>6.2</b>	<b>100.0</b>

Source: NCAER computations

**Table 4.9: State wise expenditure per tourist (Rs.) by purpose of travel  
(Outbound Tourism Consumption)**

States	Business	Leisure	Social	Religious	Education & training	Health & medical	Shopping	Other	All
A & N Islands	19,611	8,394	4,689		6,083	101			11,433
Andhra Pradesh	11,355	9,092	6,851	5,820	10,554	24,574		3,312	8,805
Arunachal Pradesh	12,418	3,768	32,788	13,037					12,133
Assam	36,869	5,491	4,383		2,331			2,258	15,063
Bihar	4,713	12,369	77,626	3,957	8,143			1,989	10,429
Chandigarh	9,011	8,097	21,864	5,264	1,747			3,834	8,444
Chhattisgarh	9,705	4,420	183		5,874			1,550	5,585
Dadra & Nagar Haveli	12,141	10,287							11,939
Daman & Diu	4,831	57,244	9,982		9,770	34,530			21,361
Delhi	6,439	7,597	12,452	7,965	5,947	4,493		7,658	7,296
Goa	33,526	10,131	208	20,070	2,230	1,45,837		9,21,800	75,948
<b>Gujarat</b>	<b>9,369</b>	<b>20,790</b>	<b>6,045</b>	<b>1,292</b>	<b>6,645</b>	<b>7,474</b>		<b>3,933</b>	<b>10,297</b>
Haryana	3,539	9,383	6,137	5,068	7,754	12,325		4,747	6,904
Himachal Pradesh	5,681	6,945	9,400		14,307			2,766	6,954
Jammu & Kashmir	705	12,771	1,898	8,357	4,526	8,757		21,569	8,459
Jharkhand	6,738	55,256	5,141		2,058			3,769	12,572
Karnataka	10,065	17,890	13,818	16,965	19,836	29,938		24,471	14,353
Kerala	29,886	35,462	46,602	7,499	23,487	28,107		51,003	39,590
Lakshadweep	28,956		6,332						19,876
Madhya Pradesh	8,286	15,325	7,171	3,311	6,442	3,317		2,362	11,198
Maharashtra	16,117	34,494	7,373	5,804	8,068	20,664		3,518	18,684
Manipur	40,498	6,770			1,776			11,727	22,898
Meghalaya	16,121							248	3,680
Mizoram	2,333	3,476	14,735		13,133			784	7,695
Nagaland	2,612		9,110	18,842					8,934
Orissa	23,972	17,343	12,135		2,349			9,102	18,345
Pondicherry	45,335	15,408						7,034	33,757
Punjab	6,913	12,475	12,326	7,994	9,529	4,305		8,828	10,059
Rajasthan	4,848	19,836	4,776	1,298	7,248	16,309		2,952	6,549
Sikkim	23,099	2,05,831	30,219		474				48,818
Tamil Nadu	17,683	14,312	18,074	36,983	14,042	18,106		7,033	15,714
Tripura	12,598	456	62,228						33,006
Uttar Pradesh	3,516	6,736	6,633	6,805	5,551	3,178		3,016	4,868
Uttaranchal	4,264	4,109	6,389	940	2,591			5,906	4,322
West Bengal	5,189	4,300	3,140	4,336	9,837	328		3,034	4,507
Others	56,460	33,725	80,215						62,774
<b>All India</b>	<b>12,558</b>	<b>17,560</b>	<b>18,681</b>	<b>5,565</b>	<b>10,655</b>	<b>22,963</b>		<b>13,711</b>	<b>15,302</b>

Source: NCAER computations

## Total Internal Tourism Consumption

4.57. TSA Table 4 in chapter 5 presents the total internal tourism expenditure and the total internal tourism consumption. Besides the internal tourism expenditure, the internal tourism consumption includes the imputed consumption. Internal tourism expenditure presented in this table is made up of inbound tourism expenditure from TSA Table 1, domestic tourism expenditure from TSA Table 2 and outbound tourism expenditure done in the economy of reference which, in this report, is given in TSA Table 3. In addition, TSA Table 4 presents separately the components of imputed consumption of tourists.

4.58. TSA Table 4 presents the estimates of total internal tourism consumption. In addition to tourism expenditure, this includes the following components of imputed consumption:

- **Services associated with vacation accommodation on own account:** This item includes all imputed accommodation services related to accommodation units on own account and to all other types of vacation home<sup>15</sup> ownership, as well as expenditure related to their acquisition that is not capitalized as part of the investment, for instance charges for time share exchanges.
- **Tourism social transfers in kind (except refunds):** This item includes the value of individual non-market services provided by Governments and non-profit institutions serving households (NPISH) that benefit visitors and exceed the values paid by the visitors themselves: costs of museums, performing arts, short-term education, health services provided short term in special establishments.
- **Other imputed consumption:** This item includes all other imputed items not previously included, such as services benefiting visitors for which they do not pay (costs of vacation residences or camps provided by producers for the benefit of their employees, financial intermediation services indirectly measured (FISIM) on purchases related to tourism trips, etc.).

<sup>15</sup> A vacation home (sometimes also designated as a holiday home) is a secondary dwelling that is visited by the members of the household mostly for purposes of recreation, vacation or any other form of leisure.

4.59. However, these components are not directly available from any data source; hence, after discussions with the technical committee members, these are derived using certain plausible assumptions.

- **Services associated with vacation accommodation on own account:** The imputed consumption on services associated with vacation homes on own account is assumed to be equal to 1 per cent of the urban owner occupied dwelling services<sup>16</sup>.
- **Tourism social transfers in kind (except refunds):** This is derived from the component of “social transfer in kind” against “Recreation and Culture” in the Classification of Individual Consumption Expenditure of Households (COICOP). Household consumption on any item of consumption comprises of the individual consumption expenditure and social transfers in kind (paid by government). Since, the data on the share of these transfers that goes to the tourists and to non-tourists are not available, it is assumed to be 50 per cent for each. The NAS statement on COICOP provides these components household consumption expenditure. For Tourism, the individual consumption expenditure component is obtained from the demand side information through DTS while the imputed consumption that relate to “social transfers in kind” is obtained from COICOP.
- **Financial Intermediation Services Indirectly Measured (FISIM) on purchases related to tourism trips:** This is obtained using the share of FISIM in PFCE (as in NAS) and applying it on total internal tourism consumption expenditure.
- **Imputed consumption of services rendered by vacation residences provided by producers for the benefit of their employees:** This refers to the cost borne by the companies (mostly private corporates) on the services that they provide in their guest houses for the benefit of employees. This is assumed to be about half per cent of the total output of organised private corporate sector.
- **Expenditure incurred by other households (mainly on food) on the visiting tourists when the tourists stay at the friends/relatives’ place:** While the accommodation cost is recommended to be excluded from the tourism consumption when the tourists stay at the friends/relatives’ place while on trip, but the expenses incurred on food is taken into account. Notably, for the domestic tourists, in large number of cases friends and

<sup>16</sup>The economic activities covered under owner occupied dwelling services include ownership of dwellings (occupied residential houses) and the imputed value of owner occupied dwellings.

relatives provided accommodation not only when the trips were taken for social purpose but for other purposes too. The expenses incurred by these households on food provided to the visitors are to be added to the imputed tourism consumption. This is obtained by multiplying the average per day expenditure of food (obtained from PFCE, NAS) with the number of days spent at friends/relatives' place during all the tourist-trips taken in a reference year.

4.60. The sum of total internal tourism expenditure and imputed tourism consumption gives the total tourism consumption, which is presented in TSA Table 4.

4.61. The internal tourism expenditures and consumption refer to the year 2009-10. Price adjustments wherever necessary to the survey data have been carried out using implicit price deflators from the item-level PFCE.

4.62. The internal tourism expenditures and consumption are at purchasers' prices and include the actual expenditures made on acquisition of goods.

4.63. The TSA Table 5 presents the production accounts of tourism industries and other industries in the economy of reference. It conforms formally to the format established in the Systems of National Accounts (SNA) 1993 for production accounts. In the SNA, Production accounts are compiled for industries and institutions.

4.64. The main aggregate that is derived from this table is the gross value added of tourism industries (GVATI). The GVATI, however, has a limited role as being a relevant indicator of tourism's contribution to the economy.

4.65. As recommended, the production account of the state economies with focus on tourism industries has been prepared using India's Supply and Use Table (SUT) for the year 2009-10 that has specially been compiled for this TSA. In the first stage, the all India SUT was prepared for 130 industries and 130 products, the same dimension which CSO uses for its 5-yearly Input-Output Tables.

4.66. In the second stage, this SUT of 130 industries was further expanded to 142 sectors to include some of the tourism specific industries which were not separately identifiable in the 130-industry SUT. The 142 sector SUT was compiled by splitting some of the 130 sectors (Refer to Technical Notes of this section). Further, since the focus of this TSA is on 25-industry/products that

### Production Account of Tourism Industries

are relevant from the tourism perspective, this 142- sector SUT was aggregated to arrive at 25-sector SUT. Of these 25 industries and products, 20 industries were the tourism specific industries, for which the information on tourism consumption is available and presented in TSA Table 4; and the remaining 5 industries and products are the tourism non-specific industries and products, which, however, would have linkages with tourism industries/products.

4.67. The 25 sector SUT<sup>17</sup> and production accounts for 25 industries have been compiled with the desired disaggregation of output of each industry broken down by 25 product groups (at basic prices), intermediate consumption (at purchasers' prices) broken down by 25 product groups and value added (at basic prices) broken down by its components of compensation of employees, other taxes on production, other subsidies on production, consumption of fixed capital and finally, the net operating surplus/mixed income. This table also includes employment in the 25 industries.

4.68. The source of data for Tables 5 and 6 is the detailed data on state domestic product, that has been provided by the CSO and the respective state Directorates of Economics and Statistics. The all-India ratios have been used for deriving output, intermediate consumption or for splitting of industries and products at state level, wherever there is lack of information by states.

### **Tourism Industry Ratios and TDGVA**

4.69. Table 6 is the core of the Tourism Satellite Account system as it is where the confrontation and reconciliation between domestic supply and internal tourism consumption take place. This table derives its conceptual basis from the supply and use tables of the System of National Accounts 1993. In this table, the total supply of goods and services in the economy of reference by products, which includes domestic production (production by resident industries) and imports, (including valuation adjustments), is compared to internal tourism consumption that has been derived in Table 4.

4.70. Using the results of table 6, estimates can be derived regarding the gross value added attributable to tourism for each of the domestic industries that serve visitors. This provides the basic information that is necessary for the computation of tourism ratios for products and industries, TDGVA (Tourism Direct Gross Value Added) and TDGDP (Tourism Direct Gross Domestic Product) and their components. The table together with the

<sup>17</sup> At State level, the supply table includes only the supplies of products at basic and purchasers' prices from domestic industries (in the all India table, this table also includes imports and presents total supplies), while the use table includes the net exports of products (in the all India table, this table shows only the exports).

associated use table<sup>18</sup> provides a basis to compile input-output tables and input-output models that facilitate estimation of indirect contribution of tourism to the economy.

4.71. Conceptually, at the national level, rows of TSA Table 6 are identical to those of TSA Table 5. Regarding columns, there are three blocks:

- The first block corresponds to the same columns as those of TSA Table 5 and represents industries.
- The second block (imports, taxes less subsidies and trade and transport margins) represents the additional variables and valuation adjustments (imports, taxes less subsidies on products and trade margins and transport freight costs, that are needed to obtain domestic supply of individual products at purchasers' prices.
- The third block is made of only two columns - internal tourism consumption that has been derived in Table 4 and tourism ratio, which is the share of internal tourism consumption to the total supply at purchasers' prices, for each product, shown in the rows.

4.72. The supply of each of the products by domestic producers is first added over industries to obtain the aggregate value of total output of domestic producers at basic prices for each of these products. Then, this column (which also corresponds to the last column of table 5 is added to the following column, Imports, cif<sup>19</sup>, which represents supply within the domestic economy of imported goods and services (besides imported goods, what concerns tourism refers to transport services within the domestic economy provided by non-resident producers, as well as insurance services or any other service provided by non-residents and purchased on the Internet or otherwise. Information on imports of services is generally available from the balance of payments statistics).

4.73. The sum of these two columns represents the total supply of each product at basic prices. This column is then added to a column of taxes less subsidies on products concerning domestic output and imports, and a last column representing trade and transport margins, in order to finally obtain the column of domestic supply at purchasers' prices for each of the product. This presentation is similar in essence to that followed in the System of

<sup>18</sup>Use table is not included in the TSA tables, although it has a role in the computation of production account of tourism industries discussed in Table 5 and also in providing coherence consistency to the supply table at product level.

<sup>19</sup>Imports cif are considered to be at basic price valuations.

National Accounts 1993 to determine the supply and use tables.

4.74. Against this final column of supply at purchasers' prices, the internal tourism consumption by products obtained from Table 4 is shown in the next column. The final column shows the Tourism ratio (in percentage) which is the ratio of internal tourism consumption to the total supply for each product. These tourism ratios allow for the estimation of the two main aggregates: TDGVA and TDGDP. The following paragraphs explain how these ratios are derived and their application for measuring tourism direct economic contribution in the economy of reference.

4.75. For each column of the supply table, a new column is added to indicate the share of internal tourism consumption within that industry. The values for this new column are generated based on the Tourism share shown in the last column of the supply table. Thus, in each row of the first block of rows representing industries, the total value of tourism shares is equal to the value of internal tourism consumption that appears in the last block of columns. In the case of the rows corresponding to goods (characteristic or other), as only the activity by which they are made available to visitors generates tourism direct value added, only the associated retail trade margin generates share. As a consequence, in the case of goods, the sum of the tourism share on supply is not equal to internal tourism consumption, but only to the value of retail trade services on those goods.

4.76. Through these calculations, it is possible, for each industry, to establish the tourism share of output (in value), as the sum of the tourism share corresponding to each product component of its output. Then, it is possible to establish, for each industry, a tourism ratio<sup>20</sup> (ratio between the total value of tourism share and total value of output of the industry expressed in percentage form), to be applied to the components of intermediate consumption, so as to arrive at the value added. If intermediate consumption is broken down by products, this tourism ratio might be uniform for each product belonging to the intermediate consumption of an industry and thus be equal to that of total output, or it might also be possible to modulate these ratios according to the relative importance of the different components of its output that is consumed by visitors (for instance, in a hotel providing also food-serving services, the ratio of accommodation services demanded by visitors might be different from that corresponding to food-serving services).

<sup>20</sup>Tourism ratios can be generated and presented separately for both the products and the industries, based on their total output.

4.77. In all cases, from the difference between the values of output attributable to tourism consumption and the values of intermediate consumption attributable to tourism consumption, the part of gross value added generated in each industry by tourism consumption is compiled.

4.78. From the above sequence of steps, it is possible, for each industry, to derive an estimate of the fraction of its gross value added (at basic prices) corresponding to the contribution of its output to total internal tourism consumption, and these values can be added over all industries, both the tourism industries and all other industries. The sum of all these portions of value added over all tourism industries is the TDGVA.

4.79. To obtain the tourism direct GDP generated by internal tourism consumption (TDGDP), it is necessary to add to TDGVA the taxes less subsidies on products and imports related to tourism products that are compiled in the same way, using the corresponding share for each product (except goods for which the share only relates to retail trade margins<sup>21</sup>). Theoretically, these aggregates (TDGVA and TDGDP) should be independent of the detail in which calculations have been performed, and in particular be independent also of the possibility of identifying tourism industries. In practice, however, this is not the case because gross value added associated with a product is not directly observable<sup>22</sup> and has to be estimated through the information provided by industries that produce this product.

4.80. The procedure that has been recommended for compiling Table 6 is applicable at national level. **The absence of data on imports in the State from other states and countries hampers the adoption of recommended method for compiling Table 6 which enables the estimation of TDGVA and TDGDP.** However, with the information available at state level, it is possible to compile TDGVA<sup>23</sup> with some assumptions. The three possible options for computing TDGVA are:

4.81. The first option is to allocate the national TDGVA to states using the share of different states in tourism internal consumption (which has been estimated for state TSA Table 4 on Total Tourism Internal Consumption). However, this method implicitly assumes that share of imports in meeting the

<sup>21</sup>No product taxes or product subsidies are shown in the Indian input output tables, therefore, net product taxes on retail trade for tourists are not available. However, in a VAT system, the cumulative taxes are borne by the final user, hence all product taxes net of subsidies on goods purchased by the tourists have been taken into account in the computation of TDGDP.

<sup>22</sup>Value added is a concept applicable for industries, which generally produce more than one product. Value added for products can only be derived through assumptions.

<sup>23</sup>At state level, only gross value added at factor cost is computed in India, but not GDP (at purchasers'). Therefore, it is neither possible nor necessary to compute TDGDP at state level. However, GVA at basic prices by industry at state level has been estimated for the State TSA tables, using all-India ratios.

tourism internal consumption in a state is same as in all India and that tourism ratio of a product is same in the state and in all-India. The assumption of share of imports in meeting tourism demand being same in a state and all India is incorrect in the case of most states.

4.82. The second option is to apply tourism industries' output ratios from national TSA to the tourism industries' output of the states, to derive tourism direct gross output. This method implicitly assumes that the product profile of each industry in a state is same as that in all India (which can be a reasonable assumption considering that most tourism industries in India produce single output) and that the share of this output being used by residents and tourists is same both at state level and in all India.

### State Tourism Industry Ratio

4.83. The third option and the one finally adopted is to derive the state specific Tourism Industry Ratios (TIR) using an auxiliary parameter. This auxiliary parameter used here is the ratio of Tourism Consumption to Private Final Consumption Expenditure (PFCE) for each tourism industry. This ratio is calculated for both All-India and for the state of reference. The item-wise PFCE are estimated using the NSSO survey data of 66<sup>th</sup> round (for 2009-10) on "Household Consumption Expenditure". If the ratio for All-India is  $X_i$  for  $i$ th industry and that for state is  $x_i$  for the same industry, then state-specific TIR for  $i$ th industry is estimated as:

$$(\text{State TIR})_i = x_i / X_i * (\text{National TIR})_i$$

4.84. The third method is used to derive the state TIRs for only the tourism characteristic industries while the TIRs for tourism connected and non-tourism industries are assumed to be the same as national TIRs. This is because for tourism connected industries, these ratios are derived using only the retail trade services on goods and hence are too low to show a variation across the states of India. Similarly, the ratios of non-tourism industries are very low for the obvious reason that non-tourism industries are only indirectly related to tourism and the magnitude to tourism component in these industries is bound to be small.

4.85. The use of an auxiliary parameter is somewhat similar to small area estimation technique which enables the estimation of small sub-populations using the estimates of larger populations which includes these sub-populations. The term "small area" generally refers to a small geographical area (here, state) within a larger area, which here is the country. When the reliable estimates are not available for the small area, it may be possible to use additional data that exists both for these small areas and for the larger area, in order to obtain the estimates for the desired parameters.

4.86. It may be noted that we have adopted this method due to the absence of requisite data for deriving the tourism industry ratios at state level although conceptually tourism consumption is by tourists whereas PFCE is by the residents. But we have assumed that the services (all tourism characteristic industries are services industries) are consumed at the time of production hence the figures may be comparable.

4.87. Also, since PFCE for some of the service industries is not captured clearly from the NSSPO survey, we have assumed the tourism consumption to PFCE ratio for these industries to be same as for the closely related industry for which this ratio can be estimated. For example, consumption expenditure is not available separately for Hotels and Food serving services, hence the ratio for latter is assumed to be same as that of former. Similarly, transport equipment rental and travel agencies are given the same ratios. Further, ratios of cultural & religious services and that of sports & recreational services are the same.

4.88. Hence obtained TIRs for all 25 industries of Gujarat are given in the table below:

Table 4.10: State-specific Tourism Industry Ratios

Industries	India		Gujarat		
	Ratio1 = PFCE/Tourism Consumption for India	India TIR	Ratio2 = PFCE/Tourism Consumption for state	A = Ratio2/Ratio1	State TIR = A*India TIR
1. Agriculture		0.00			0.00
2. Mining, other manufacturing, construction, electricity, gas and water supply		0.00			0.00
3. Trade		0.66			0.66
4. transport freight services		2.25			2.25
5. All non-tourism specific services		2.29			2.29
<b>A 1. Tourism characteristic product</b>					
1. Accommodation services/Hotels	0.54	51.09	0.79	1.45	73.94
2 Food and beverage serving services/Restaurants	0.54	16.37	0.79	1.45	23.69
3 Railway passenger transport services	0.99	57.63	1.12	1.13	64.91
4 Road passenger transport services	0.77	54.42	0.58	0.75	40.78
5 Water passenger transport services	5.28	12.10	1.47	0.28	3.36
6 Air passenger transport services	4.71	77.20	2.19	0.47	35.95
7 Transport equipment rental services	14.63	28.82	14.21	0.97	27.99
8 Travel agencies and other reservation services/ Supporting and auxiliary transport activities	14.63	72.36	14.21	0.97	70.30
9 Cultural and religious services	0.95	17.06	0.50	0.52	8.94
10 Sports and other recreational services	0.95	3.84	0.50	0.52	2.01
11 Health and medical related services	0.31	30.05	0.44	1.42	42.71
<b>A.2 Tourism connected products</b>					
12 Readymade garments		0.00			0.00
13 Processed Food		0.00			0.00
14 Tobacco products		0.00			0.00
15 Beverages		0.02			0.02
16 Travel related consumer goods		0.00			0.00
17 Footwear		0.00			0.00
18 Soaps, cosmetics and glycerin		0.00			0.00
19 Gems and jewellery		0.00			0.00
20 Books, journals, magazines, stationery etc.		0.00			0.00
Total					

Source: NCAER computations

**Employment  
in Tourism  
Industries**

4.89. TSA Table 7 presents the employment in tourism industries. According to TSA:RMF-2008, seasonality, high variability in the working conditions, flexibility and the informality of jobs in several small units are the major challenges in collecting data on employment in tourism industries. Further, labour is a factor of production and is generally associated with an establishment in which, usually, various products are produced. Therefore, relating employment to a specific product or group of products of a given establishment is a complex issue in measuring tourism direct employment.

4.90. While labour can be associated with the total output of an establishment, it cannot be assigned to any particular product without the use of specific assumptions and modelling procedures. For this reason, tourism employment, referring to the employment strictly related to the goods and services (tourism characteristic, tourism connected and other) acquired by visitors and produced by either tourism industries or other industries cannot be directly observed. Its measurement would require techniques that go beyond the present recommendations. As a result, the recommendations in the TSA:RMF 2008 are restricted to employment in the tourism industries.

4.91. Consequently, the measures proposed refer to the restrictive quantification of employment according to its statistical meaning (since not all volume of employment found in a given industry corresponds to tourism consumption) and coverage (since there are different levels of employment in other industries that partly correspond to tourism consumption).

4.92. Two major breakdowns of the number of jobs and hours worked are proposed: one according to the sex of the person employed, the other according to a simplified status in employment classification, where only employees are singled out from the rest of the labour force. The intensity of the use of the labour force is expressed in terms of number of jobs, number of hours worked (in the reference period) and number of full-time equivalent jobs (in the reference period) in order to make the measurements comparable and to wipe out the effects of part-time jobs.

4.93. Because the flow of visitors often presents marked seasonality, this phenomenon also characterizes employment, in particular in industries such as accommodation and food and beverage serving services. For this reason, countries are encouraged to measure employment at least twice a year, at peak and low tourism seasons. The number of jobs, hours of work and other characteristics of the labour force should provide basic information for understanding and monitoring the changing levels and contribution of tourism activity.

4.94. As recommended, Table 7 presents the total number of jobs (one employed person can take up more than one job, the other being of subsidiary nature) and number of people employed in the tourism specific industries. As part of Table 7, two tables on employment have been prepared – one table distinguishes the employment (number of jobs and headcount) in tourism industries by nature of employment (self-employed and employees) and by gender. The other table distinguishes employment by their formal and informal nature, since informal sector and informality of jobs is highly prevalent in India.

4.95. For preparing these tables, the unit level data of 66th Round of NSSO survey on “Employment-Unemployment” (EUS) has been analysed. For identifying the formal and informal nature of job, the person employed is classified accordingly using the information on his/her status of work and the enterprise in which employed. On the basis of this information, a person is identified as formal and informal using the mapping given in table below:

**Table 4.11: Identification of Formal/Informal workers (EUS)**

Enterprise Type	Formal	Informal
1. Proprietary male	None	All
2. Proprietary female		
3. Partnership with members of same household		
4. Partnership with members of diff household		
5. Public sector	Status=Regular wage earner	Status=Others
6. Public/Private limited company	Status= Regular wage earner	Status= Others
7. Co-operative societies/trust/other non-profit institutions	Status= Regular wage earner and number of workers > 5 and job contract is written and is for more than 1 year	Rest
8. Employer's households		
9. Others		

Source: NCAER computations

### Non-monetary Indicators

4.96. TSA Table 10 presents a few quantitative indicators that are important for the interpretation of the monetary information presented. The indicators include the number of trips by forms of tourism, classes of visitors and duration of the stay, physical indicators regarding types of accommodation, modes of transport used by non-resident visitors travelling to the economic territory of the country of reference, and the number and size of the establishments belonging to tourism industries. However, the set of

non-monetary indicators may vary from country to country or from region to region depending on the availability of data.

4.97. For the states of India, and Gujarat in particular, the following set of tables form TSA Table 10. It should be noted that there are not enough data on inbound or outbound tourism originating from the states. "India Tourism Statistics", a publication of the Ministry of Tourism reports a table on state-wise domestic and foreign visits, which forms TSA Table 10.1. Rest of the tables are obtained from the DTS- 2008-09.



## **5. TSA TABLES AND ACCOUNTS**



## TSA TABLES

TSA Table 1A: Inbound Tourism Expenditure by products and by type of foreign tourists (expenditure at market price)

S. No	Industries	Non-Resident Indians	Foreigner PIO	Foreigner Others	Total International Demand
<b>A 1. Tourism characteristic products</b>		<b>14867</b>	<b>22684</b>	<b>112301</b>	<b>149852</b>
1	Accommodation services/Hotels	3574	8791	54046	66412
2	Food and beverage serving services/Restaurants	4022	4074	21107	29203
3	Railway passenger transport services	197	704	1609	2510
4	Road passenger transport services	1643	1920	6675	10237
5	Water passenger transport	299	15	166	480
6	Air passenger transport services	1521	3303	10356	15180
7	Transport equipment rental services	329	729	1939	2998
8	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	219	395	2655	3269
9	Cultural and religious services	294	690	1730	2715
10	Sports and other recreational services	1486	1684	3534	6704
11	Health and medical related services	1282	377	8485	10145
<b>A.2 Tourism connected products</b>		<b>14155</b>	<b>6514</b>	<b>26816</b>	<b>47485</b>
12	Readymade garments	3808	2028	8470	14306
13	Processed food	323	240	1100	1663
14	Tobacco products	39	255	252	546
15	Beverages	248	1382	2611	4241
16	Travel related consumer goods	175	87	809	1071
17	Footwear	369	269	1392	2030
18	Soaps, cosmetics and glycerine	46	22	146	214
19	Gems and jewellery	7437	1734	9073	18244
20	Books, journals, magazines, stationery etc.	1710	497	2962	5169
<b>Total</b>		<b>29022</b>	<b>29198</b>	<b>139117</b>	<b>197337</b>
Estimated number of trips		22732	18160	89848	130739
Expenditure per trip (Rs.)		127672	160784	154837	150939

Source: NCAER computations

**TSA Table 1B: Inbound Tourism Expenditure (incurred by tourists from other states) by products and purposes of travel (expenditure at market price)**

		(Rs. Lakh)							
		(Package + Non-package)							
S. No	Industries	Business	Leisure	Social	Religious	Education & training	Health & medical	Other	All
<b>A 1. Tourism characteristic products</b>		44227	7207	202922	53098	5439	31448	18464	362804
1	Accommodation services/Hotels	2530	458	453	2011	223	872	181	6728
2	Food and beverage serving services/Restaurants	2828	536	7567	4133	453	1303	894	17715
3	Railway passenger transport services	11200	4831	114440	23065	951	4439	6465	165392
4	Road passenger transport services	6692	584	50758	19091	2736	5604	5556	91021
5	Water passenger transport	0	0	0	20	43	0	0	63
6	Air passenger transport services	16030	0	12928	910	520	0	2363	32751
7	Transport equipment rental services	2609	752	11725	3072	179	339	528	19204
8	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	1850	26	4089	338	332	1197	809	8641
9	Cultural and religious services	1	1	75	411	1	5	3	498
10	Sports and other recreational services	1	0	38	0	1	5	3	48
11	Health and medical related services	486	19	848	47	0	17683	1662	20745
<b>A.2 Tourism connected products</b>		3841	1495	34944	4919	593	261	8597	54651
12	Readymade garments	2299	1105	27805	3459	492	4	7711	42875
13	Processed food	286	166	3198	253	33	144	381	4462
14	Tobacco products	338	40	560	134	1	53	181	1307
15	Beverages	187	0	4	38	1	0	29	259
16	Travel related consumer goods	225	38	1153	492	6	50	177	2141
17	Footwear	445	91	819	446	45	1	104	1951
18	Soaps, cosmetics and glycerine	54	8	57	29	1	5	2	156
19	Gems and jewellery	0	13	1269	32	14	0	0	1327
20	Books, journals, magazines, stationery etc.	6	35	78	36	0	3	13	172
<b>Total</b>		48067	8703	237866	58017	6032	31708	27061	417455
Estimated number of trips		412856	70030	2293949	466643	41156	236617	195655	3716906
Expenditure per trip (Rs.)		11643	12427	10369	12433	14656	13401	34453	11231

Source: NCAER computations

**TSA Table 1C: Total Inbound Tourism Expenditure by products (expenditure at market price)**

(Package + Non-package)

(Rs. Lakh)

S. No	Industries	Non-Resident Indians	Foreigner PIO	Foreigner Others	Indians from other states	Total Inbound Demand
<b>A 1. Tourism characteristic products</b>		14867	22684	112301	362804	512656
1	Accommodation services/Hotels	3574	8791	54046	6728	73139
2	Food and beverage serving services/Restaurants	4022	4074	21107	17715	46918
3	Railway passenger transport services	197	704	1609	165392	167902
4	Road passenger transport services	1643	1920	6675	91021	101259
5	Water passenger transport	299	15	166	63	543
6	Air passenger transport services	1521	3303	10356	32751	47931
7	Transport equipment rental services	329	729	1939	19204	22201
8	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	219	395	2655	8641	11910
9	Cultural and religious services	294	690	1730	498	3212
10	Sports and other recreational services	1486	1684	3534	48	6752
11	Health and medical related services	1282	377	8485	20745	30889
<b>A.2 Tourism connected products</b>		14155	6514	26816	54651	102136
12	Readymade garments	3808	2028	8470	42875	57181
13	Processed food	323	240	1100	4462	6125
14	Tobacco products	39	255	252	1307	1853
15	Beverages	248	1382	2611	259	4500
16	Travel related consumer goods	175	87	809	2141	3212
17	Footwear	369	269	1392	1951	3981
18	Soaps, cosmetics and glycerine	46	22	146	156	370
19	Gems and jewellery	7437	1734	9073	1327	19571
20	Books, journals, magazines, stationery etc.	1710	497	2962	172	5341
<b>Total</b>		29022	29198	139117	417455	614792
Estimated number of trips		22732	18160	89848	3716906	3847646
Expenditure per trip (Rs.)		127672	160784	154837	11231	454524

Source: NCAER computations

**Table 2: Domestic Tourism Consumption (visitors from within the state of reference) by products and by purpose of travel**

(Rs. Lakh)

S. No	Industries	Business	Leisure	Social	Religious	Education & training	Health & medical	Shopping	Other	All
<b>A 1. Tourism characteristic products</b>		22185	26973	706984	214145	21765	371575	2222	16477	1382327
1	Accommodation services/Hotels	1346	777	1745	6347	1681	1613	0	1355	14863
2	Food and beverage serving services/Restaurants	1422	3584	34101	11083	1535	6276	9	813	58823
3	Railway passenger transport services	47	284	48076	11281	303	455	0	9190	69635
4	Road passenger transport services	12134	20223	489597	113046	7301	35721	281	3035	681337
5	Water passenger transport	27	9	893	598	0	131	27	0	1686
6	Air passenger transport services	0	0	0	4584	0	0	0	0	4584
7	Transport equipment rental services	3209	1460	91422	51275	1269	7414	303	1118	157471
8	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	3892	284	37061	12967	9647	3772	1541	48	69211
9	Cultural and religious services	47	158	774	2660	3	14	1	10	3667
10	Sports and other recreational services	23	144	359	41	28	0	1	5	601
11	Health and medical related services	38	49	2956	263	0	316179	59	904	320447
<b>A.2 Tourism connected products</b>		3880	8723	197081	27489	6190	3023	1250	654	248290
12	Readymade garments	1705	2665	91713	11097	1861	528	968	210	110747
13	Processed food	1251	1094	18583	4889	1062	889	24	114	27905
14	Tobacco products	168	304	11013	1205	33	493	2	69	13288
15	Beverages	0	3	9	0	0	32	0	0	45
16	Travel related consumer goods	590	2193	33301	5590	2344	863	150	108	45139
17	Footwear	18	820	12209	2258	59	31	72	0	15467
18	Soaps, cosmetics and glycerine	46	160	1442	305	71	130	33	3	2189
19	Gems and jewellery	40	1344	26971	1691	546	26	0	149	30768
20	Books, journals, magazines, stationery etc.	62	139	1841	454	214	32	0	0	2742
<b>Total</b>		26065	35696	904065	241634	27956	374599	3472	17131	1630617
Estimated number of trips		503075	693568	3052377 7	6061375	554213	1555617	30588	26502 2	4018723 4
Expenditure per trip (Rs.)		5181	5147	2962	3986	5044	24080	11351	6464	4058

Source: NCAER computations

**Table 3: Outbound Tourism Consumption by products and by purpose of travel (expenditure at market price)**

(Rs. Lakh)

S. No	Industries	Business	Leisure	Social	Religious	Education & training	Health & medical	Other	All
<b>A 1. Tourism characteristic products</b>		23926	27673	6010	156	3125	33	2054	62976
1	Accommodation services/Hotels	10685	13032	1408	35	677	0	722	26560
2	Food and beverage serving services/Restaurants	3829	5790	1961	32	1209	7	260	13087
3	Railway passenger transport services	685	998	393	15	65	0	25	2181
4	Road passenger transport services	2454	5148	1447	33	176	0	126	9384
5	Water passenger transport	17	149	0	0	0	0	0	166
6	Air passenger transport services	4309	1401	235	35	147	25	850	7001
7	Transport equipment rental services	490	39	70	0	29	0	0	628
8	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	1016	662	215	4	594	0	70	2561
9	Cultural and religious services	106	45	62	0	0	0	0	213
10	Sports and other recreational services	100	228	98	0	52	0	0	477
11	Health and medical related services	235	180	123	2	175	0	1	717
<b>A.2 Tourism connected products</b>		8688	12477	7998	0	1592	19	97	30871
12	Readymade garments	2215	4813	1221	0	305	12	32	8597
13	Processed food	741	836	569	0	59	0	7	2212
14	Tobacco products	136	101	43	0	4	0	0	283
15	Beverages	200	717	226	0	0	0	0	1143
16	Travel related consumer goods	3573	2657	3856	0	816	7	38	10947
17	Footwear	464	571	478	0	33	0	8	1554
18	Soaps, cosmetics and glycerine	90	263	99	0	0	0	0	453
19	Gems and jewellery	925	1801	1339	0	313	0	13	4390
20	Books, journals, magazines, stationery etc.	344	718	168	0	63	0	0	1292
<b>Total</b>		32613	40150	14008	156	4716	51	2151	93847
Estimated number of trips		348107	193125	23173 4	12108	70973	687	54703	91143 6
Expenditure per trip (Rs.)		9369	20790	6045	1292	6645	7474	3933	10297

Source: NCAER computations

TSA Table 4: Total Internal Tourism Consumption, 2009-10

(Rs. lakh)

S. No	Industries	Inbound Tourism Consumption	Domestic Tourism Consumption	Outbound Tourism Consumption	Total Tourism Consumption
<b>A 1. Tourism characteristic products</b>		<b>512,656</b>	<b>1,382,327</b>	<b>62,976</b>	<b>1,957,960</b>
1	Accommodation services/Hotels	73,140	14,863	26,560	114,563
2	Food and beverage serving services/Restaurants	46,918	58,823	13,087	118,829
3	Railway passenger transport services	167,902	69,635	2,181	239,719
4	Road passenger transport services	101,258	681,337	9,384	791,979
5	Water passenger transport	544	1,686	166	2,396
6	Air passenger transport services	47,931	4,584	7,001	59,516
7	Transport equipment rental services	22,201	157,471	628	180,301
8	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	11,910	69,211	2,561	83,682
9	Cultural and religious services	3,212	3,667	213	7,092
10	Sports and other recreational services	6,752	601	477	7,830
11	Health and medical related services	30,890	320,447	717	352,054
<b>A.2 Tourism connected products</b>		<b>102,135</b>	<b>248,290</b>	<b>30,871</b>	<b>381,296</b>
12	Readymade garments	57,181	110,747	8,597	176,525
13	Processed food	6,125	27,905	2,212	36,241
14	Tobacco products	1,853	13,288	283	15,424
15	Beverages	4,500	45	1,143	5,688
16	Travel related consumer goods	3,213	45,139	10,947	59,299
17	Footwear	3,981	15,467	1,554	21,002
18	Soaps, cosmetics and glycerine	370	2,189	453	3,012
19	Gems and jewellery	19,571	30,768	4,390	54,729
20	Books, journals, magazines, stationery etc.	5,341	2,742	1,292	9,376
<b>A.3 Other imputed connected products</b>			<b>216,329</b>		<b>216,329</b>
21	Vacation homes (assumed to be 1% of urban owner occupied dwelling services)		9403		9,403
22	Social transfers in kind (50% of GFCE of tourism and cultural services)		6172		6,172
23	FISIM (calculated from the share of FISIM in PFCE)		66740		66,740
24	Producers' guest houses (.5% of private organised sector share in output)		58657		58,657
25	Imputed expenditures of households on food for tourists staying with them		75357		75,357
<b>Total</b>		<b>614,792</b>	<b>1,846,946</b>	<b>93,847</b>	<b>2,555,585</b>

Source: NCAER computation

**TSA Table 5: Production account of tourism industries and other industries, Gujarat  
2009-10**

Supply table at basic prices 25 X 25 product X industry, 2009-10

(Rs. lakh)

S. No.	Industry	Industry as per the Serial No. given in first column				
		1	2	3	4	5
1	Agriculture	5283872	7004	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	15489	9862913	0	0	0
3	Trade	5042	107688	421020 8	0	0
4	Transport freight services	0	0	0	869205	0
5	All non-tourism specific services	0	738	0	0	4905741
6	Processed food products	31761	14149	0	0	0
7	Beverages	654	4281	0	0	0
8	Tobacco products	1	0	0	0	0
9	Readymade garments	0	46155	0	0	0
10	Printing and publishing	0	7417	0	0	0
11	Leather footwear	0	3459	0	0	0
12	Travel related consumer goods	0	12542	0	0	0
13	Soaps and cosmetics	0	8366	0	0	0
14	Gems and jewellery	0	4808	0	0	0
15	Railway passenger transport services	0	0	0	0	0
16	Land passenger transport including via pipeline	0	0	0	35406	0
17	Water passenger transport	0	0	0	0	0
18	Air passenger transport	0	0	0	0	0
19	Tourism related supporting and auxiliary transport activities	0	0	0	0	0
20	Hotels	0	0	0	0	0
21	Restaurants	0	0	0	0	0
22	Medical and health	0	0	0	0	0
23	Renting of transport equipment	0	174	0	0	0
24	Cultural and religious services	0	0	0	0	0
25	Sporting and recreational services	0	196	0	0	0
Total domestic output at basic prices		5336818	10079890	421020 8	904611	4905741

**TSA Table 5: Production account of tourism industries and other industries, Gujarat  
2009-10**

Supply table at basic prices 25 X 25 product X industry, 2009-10

(Rs. lakh) Contd.

S. No.	Industry	Industry as per the Serial No. given in first column					
		6	7	8	9	10	11
1	Agriculture	103937	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	6655	267	29	4800	4703	843
3	Trade	326	47	47	0	257	108
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	3	12	0	0	0	0
6	Processed food products	122469	118	367	0	0	0
7	Beverages	255	4727	0	0	0	0
8	Tobacco products	0	0	16501	0	0	0
9	Readymade garments	0	0	0	133513	0	1
10	Printing and publishing	0	0	0	0	19695	0
11	Leather footwear	0	0	0	0	0	782
12	Travel related consumer goods	3	0	0	793	14	123
13	Soaps and cosmetics	62	2	51	0	0	0
14	Gems and jewellery	0	0	0	0	0	0
15	Railway passenger transport services	0	0	0	0	0	0
16	Land passenger transport including via pipeline	0	0	0	0	0	0
17	Water passenger transport	0	0	0	0	0	0
18	Air passenger transport	0	0	0	0	0	0
19	Tourism related supporting and auxiliary transport activities	0	0	0	0	0	0
20	Hotels	0	0	0	0	0	0
21	Restaurants	0	0	0	0	0	0
22	Medical and health	0	0	0	0	0	0
23	Renting of transport equipment	1	3	0	0	0	0
24	Cultural and religious services	0	0	0	0	0	0
25	Sporting and recreational services	0	0	0	0	2	0
Total domestic output at basic prices		233712	5177	16996	139106	24672	1857

**TSA Table 5: Production account of tourism industries and other industries, Gujarat  
2009-10**

Supply table at basic prices 25 X 25 product X industry, 2009-10

(Rs. lakh) Contd.

S. No.	Industry	Industry as per the Serial No. given in first column					
		12	13	14	15	16	17
1	Agriculture	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	2625	9816	1119	0	0	0
3	Trade	50	1232	1595	0	0	0
4	Transport freight services	0	0	0	0	25297	0
5	All non-tourism specific services	0	1	0	0	0	0
6	Processed food products	0	0	0	0	0	0
7	Beverages	0	0	0	0	0	0
8	Tobacco products	0	0	0	0	0	0
9	Readymade garments	4	4	0	0	0	0
10	Printing and publishing	1	0	0	0	0	0
11	Leather footwear	266	0	0	0	0	0
12	Travel related consumer goods	793	2	2	0	0	0
13	Soaps and cosmetics	3	77346	6	0	0	0
14	Gems and jewellery	1	15	151371	0	0	0
15	Railway passenger transport services	0	0	0	173074	0	0
16	Land passenger transport including via pipeline	0	0	0	0	462113	0
17	Water passenger transport	0	0	0	0	0	35798
18	Air passenger transport	0	0	0	0	0	0
19	Tourism related supporting and auxiliary transport activities	0	0	0	0	0	0
20	Hotels	0	0	0	0	0	0
21	Restaurants	0	0	0	0	0	0
22	Medical and health	0	0	0	0	0	0
23	Renting of transport equipment	0	0	0	0	0	0
24	Cultural and religious services	0	0	0	0	0	0
25	Sporting and recreational services	0	0	0	0	0	0
Total domestic output at basic prices		3744	88416	154093	173074	487409	35798

**TSA Table 5: Production account of tourism industries and other industries, Gujarat  
2009-10**

Supply table at basic prices 25 X 25 product X industry, 2009-10

(Rs. lakh) Contd.

S. No.	Industry	Industry as per the Serial No. given in first column					
		18	19	20	21	22	23
1	Agriculture	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	0	0	0	0	0	0
3	Trade	0	0	0	0	0	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	0	0	0	0	0	0
6	Processed food products	0	0	0	0	0	0
7	Beverages	0	0	0	0	0	0
8	Tobacco products	0	0	0	0	0	0
9	Readymade garments	0	0	0	0	0	0
10	Printing and publishing	0	0	0	0	0	0
11	Leather footwear	0	0	0	0	0	0
12	Travel related consumer goods	0	0	0	0	0	0
13	Soaps and cosmetics	0	0	0	0	0	0
14	Gems and jewellery	0	0	0	0	0	0
15	Railway passenger transport services	0	0	0	0	0	0
16	Land passenger transport including via pipeline	0	0	0	0	0	0
17	Water passenger transport	0	0	0	0	0	0
18	Air passenger transport	10962	0	0	0	0	0
19	Tourism related supporting and auxiliary transport activities	0	13050	0	0	0	0
20	Hotels	0	0	95220	5318	0	0
21	Restaurants	0	0	37213	940218	0	0
22	Medical and health	0	0	0	0	664155	0
23	Renting of transport equipment	0	0	0	0	0	6448
24	Cultural and religious services	0	0	0	0	0	0
25	Sporting and recreational services	0	0	0	0	0	0
Total domestic output at basic prices		10962	13050	132434	945536	664155	6448

**TSA Table 5: Production account of tourism industries and other industries, Gujarat  
2009-10**

Supply table at basic prices 25 X 25 product X industry, 2009-10

(Rs. lakh) Contd.

S. No.	Industry	Industry as per the Serial No. given in first column		Total domestic output at basic prices	TTM
		24	25		
1	Agriculture	0	0	5394814	2444841
2	Mining, other manufacturing, construction, electricity, gas and water supply	0	0	9909261	2655957
3	Trade	0	0	4326600	-4326600
4	Transport freight services	0	0	894502	-898324
5	All non-tourism specific services	0	0	4906495	0
6	Processed food products	0	0	168864	47860
7	Beverages	0	0	9916	1580
8	Tobacco products	0	0	16502	7336
9	Readymade garments	0	0	179678	23443
10	Printing and publishing	0	0	27114	10001
11	Leather footwear	0	0	4507	5560
12	Travel related consumer goods	0	0	14273	7731
13	Soaps and cosmetics	0	0	85837	7608
14	Gems and jewellery	0	0	156195	13005
15	Railway passenger transport services	0	0	173074	0
16	Land passenger transport including via pipeline	0	0	497518	0
17	Water passenger transport	0	0	35798	0
18	Air passenger transport	0	0	10962	0
19	Tourism related supporting and auxiliary transport activities	0	0	13050	0
20	Hotels	0	0	100539	0
21	Restaurants	0	0	977431	0
22	Medical and health	0	0	664155	0
23	Renting of transport equipment	0	0	6627	0
24	Cultural and religious services	50076	0	50076	0
25	Sporting and recreational services	0	248075	248273	0
Total domestic output at basic prices		50076	248075	28872059	0

**TSA Table 5: Production account of tourism industries and other industries, Gujarat  
2009-10**

Supply table at basic prices 25 X 25 product X industry, 2009-10

(Rs. lakh) Contd.

S. No.	Industry	Taxes	Subsidies	NIT	Total Supply at purchasers' prices
1	Agriculture	24414	438311	-413897	7425757
2	Mining, other manufacturing, construction, electricity, gas and water supply	742673	173859	568814	13134032
3	Trade	0	0	0	0
4	Transport freight services	6077	2255	3822	0
5	All non-tourism specific services	84375	14772	69603	4976099
6	Processed food products	3010	772	2238	218962
7	Beverages	2430	0	2430	13925
8	Tobacco products	6027	0	6027	29866
9	Readymade garments	2595	125	2471	205592
10	Printing and publishing	257	65	192	37307
11	Leather footwear	60	0	60	10127
12	Travel related consumer goods	482	169	313	22318
13	Soaps and cosmetics	10949	163	10787	104232
14	Gems and jewellery	1162	0	1162	170362
15	Railway passenger transport services	184	0	184	173258
16	Land passenger transport including via pipeline	2258	1541	717	498235
17	Water passenger transport	1986	0	1986	37784
18	Air passenger transport	118	290	-172	10790
19	Tourism related supporting and auxiliary transport activities	402	0	402	13452
20	Hotels	85	43	42	100580
21	Restaurants	525	267	259	977690
22	Medical and health	0	0	0	664155
23	Renting of transport equipment	78	0	78	6705
24	Cultural and religious services	187	352	-165	49911
25	Sporting and recreational services	26904	44724	-17821	230452
Total domestic output at basic prices		917239	677708	239531	29111590

**TSA Table 5: Production account of tourism industries and other industries, Gujarat  
2009-10**

Use table at purchasers' prices 25 X 25 products X industry, 2009-10 (Rs. lakh) Contd.

S. No.	Industry	Industry as per the Serial No. given in first column				
		1	2	3	4	5
1	Agriculture	716599	562754	0	18826	5066
2	Mining, other manufacturing, construction, electricity, gas and water supply	375111	6120640	238999	391877	277456
3	Trade	0	0	0	0	0
4	Transport freight services	0	0	0	0	0
5	All non-tourism specific services	54503	391725	255138	45311	262098
6	Processed food products	12034	44408	0	40	429
7	Beverages	0	4260	0	5	382
8	Tobacco products	0	18	0	0	0
9	Readymade garments	133	18843	308	419	2131
10	Printing and publishing	686	1550	12673	1559	3266
11	Leather footwear	0	557	0	275	0
12	Travel related consumer goods	34	4120	215	168	288
13	Soaps and cosmetics	0	4017	0	18	27
14	Gems and jewellery	0	1657	0	0	0
15	Railway passenger transport services	606	6899	407	455	4053
16	Land passenger transport including via pipeline	15380	44144	120651	6521	23512
17	Water passenger transport	9	13	2	1	0
18	Air passenger transport	226	18939	386	249	5155
19	Tourism related supporting and auxiliary transport activities	0	312	0	93	0
20	Hotels	1969	1537	17614	18186	17816
21	Restaurants	5788	4517	51784	53464	52378
22	Medical and health	0	0	0	1218	12470
23	Renting of transport equipment	36	660	2	263	169
24	Cultural and religious services	25	3791	44	150	1567
25	Sporting and recreational services	3234	15936	34	391	1660
IC-PP		1186373	7251295	698256	539488	669922
GVA-basic prices		4150445	2828595	3511952	365123	4235819
CoE		627339	1133371	538885	131947	1717636
OS/MI		3197912	1094433	2863612	187636	2056056
CFC		289543	539579	90265	40691	378225
net taxes on production		36245	63178	19751	4956	85849
GO-basic prices		5336818	10079890	4210208	904611	4905741
Employment (lakh)		159.37	41.71	24.02	6.35	24.98

**TSA Table 5: Production account of tourism industries and other industries, Gujarat 2009-10**

Use table at purchasers' prices 25 X 25 products X industry, 2009-10 (Rs. lakh) Contd.

S. No.	Industry	Industry as per the Serial No. given in first column				
		6	7	8	9	10
1	Agriculture	178554	1096	3899	648	14
2	Mining, other manufacturing, construction, electricity, gas and water supply	19207	1185	2067	90178	17635
3	Trade	0	0	0	0	0
4	Transport freight services	0	0	0	0	0
5	All non-tourism specific services	4394	100	884	12108	1285
6	Processed food products	8505	1170	1701	107	128
7	Beverages	44	339	0	0	0
8	Tobacco products	0	0	5312	0	0
9	Readymade garments	12	0	0	5346	46
10	Printing and publishing	2	0	2	8	928
11	Leather footwear	0	0	0	0	0
12	Travel related consumer goods	4	1	0	246	13
13	Soaps and cosmetics	3	4	207	575	29
14	Gems and jewellery	0	0	0	0	0
15	Railway passenger transport services	60	1	98	295	26
16	Land passenger transport including via pipeline	292	6	241	699	181
17	Water passenger transport	0	0	0	0	0
18	Air passenger transport	17	2	58	74	46
19	Tourism related supporting and auxiliary transport activities	0	0	0	0	0
20	Hotels	2	0	0	0	0
21	Restaurants	5	0	0	0	0
22	Medical and health	0	0	0	0	0
23	Renting of transport equipment	0	0	1	1	0
24	Cultural and religious services	7	0	1	321	22
25	Sporting and recreational services	17	1	249	493	22
IC-PP		211124	3903	14720	111098	20378
GVA-basic prices		22588	1274	2275	28009	4294
CoE		6733	73	422	6624	696
OS/MI		9824	861	1372	14206	2576
CFC		5414	305	419	6414	904
net taxes on production		628	35	63	779	119
GO-basic prices		233712	5177	16996	139106	24672
Employment (lakh)		0.63	0.26	0.01	5.32	0.32

**TSA Table 5: Production account of tourism industries and other industries, Gujarat  
2009-10**

Use table at purchasers' prices 25 X 25 products X industry, 2009-10 (Rs. lakh) Contd.

S. No.	Industry	Industry as per the Serial No. given in first column				
		11	12	13	14	15
1	Agriculture	82	337	2355	0	1
2	Mining, other manufacturing, construction, electricity, gas and water supply	987	1719	44922	58936	59598
3	Trade	0	0	0	0	0
4	Transport freight services	0	0	0	0	0
5	All non-tourism specific services	115	110	5120	17638	4347
6	Processed food products	32	31	3014	0	0
7	Beverages	0	1	186	0	0
8	Tobacco products	0	0	0	0	0
9	Readymade garments	15	9	0	0	2
10	Printing and publishing	0	0	30	0	41
11	Leather footwear	7	1	0	0	0
12	Travel related consumer goods	68	370	8	136	40
13	Soaps and cosmetics	0	1	8565	0	0
14	Gems and jewellery	0	4	0	40901	0
15	Railway passenger transport services	8	1	87	609	73
16	Land passenger transport including via pipeline	16	12	655	6118	294
17	Water passenger transport	0	0	0	113	0
18	Air passenger transport	2	4	362	1287	13
19	Tourism related supporting and auxiliary transport activities	0	0	0	0	0
20	Hotels	0	0	0	0	65
21	Restaurants	0	0	0	0	191
22	Medical and health	0	0	0	0	2153
23	Renting of transport equipment	0	0	1	12	320
24	Cultural and religious services	0	1	44	273	0
25	Sporting and recreational services	9	15	232	172	30
IC-PP		1342	2617	65581	126196	67167
GVA-basic prices		514	1128	22835	27897	105907
CoE		61	121	967	7160	73683
OS/MI		330	738	15910	15885	9241
CFC		109	249	5333	4090	19903
net taxes on production		14	20	635	775	3080
GO-basic prices		1857	3744	88416	154093	173074
Employment (lakh)		0.65	0.03	0.10	7.06	0.15

**TSA Table 5: Production account of tourism industries and other industries, Gujarat  
2009-10**

Use table at purchasers' prices 25 X 25 products X industry, 2009-10 (Rs. lakh) Contd.

S. No.	Industry	Industry as per the Serial No. given in first column				
		16	17	18	19	20
1	Agriculture	75898	404	0	0	64592
2	Mining, other manufacturing, construction, electricity, gas and water supply	152881	10298	4766	1886	13023
3	Trade	0	0	0	0	0
4	Transport freight services	0	0	0	0	0
5	All non-tourism specific services	9513	1655	690	1358	1067
6	Processed food products	94	50	0	0	6074
7	Beverages	0	15	0	0	1518
8	Tobacco products	0	0	0	0	0
9	Readymade garments	2	322	98	1	603
10	Printing and publishing	258	23	4	140	19
11	Leather footwear	2	0	0	0	0
12	Travel related consumer goods	17	4	19	2	1
13	Soaps and cosmetics	0	3	78	0	123
14	Gems and jewellery	0	0	0	0	0
15	Railway passenger transport services	9	11	1	52	11
16	Land passenger transport including via pipeline	50	1170	363	1092	77
17	Water passenger transport	0	0	0	0	0
18	Air passenger transport	12	14	2	3	30
19	Tourism related supporting and auxiliary transport activities	0	0	0	21	0
20	Hotels	7446	166	39	412	319
21	Restaurants	21891	488	114	1211	937
22	Medical and health	0	0	0	0	0
23	Renting of transport equipment	77	15	6	0	0
24	Cultural and religious services	38	0	0	15	5
25	Sporting and recreational services	157	27	6	4	17
IC-PP		268347	14665	6187	6197	88415
GVA-basic prices		219062	21133	4775	6854	44018
CoE		41372	2691	3554	4961	12105
OS/MI		157530	16524	657	1090	27929
CFC		18934	1769	530	755	3648
net taxes on production		1278	155	35	50	340
GO-basic prices		487409	35798	10962	13050	132434
Employment (lakh)		5.27	0.10	0.00	0.50	0.32

**TSA Table 5: Production account of tourism industries and other industries, Gujarat  
2009-10**

Use table at purchasers' prices 25 X 25 products X industry, 2009-10 (Rs. lakh) Contd.

S. No.	Industry	Industry as per the Serial No. given in first column				
		21	22	23	24	25
1	Agriculture	487775	19493	0	0	632
2	Mining, other manufacturing, construction, electricity, gas and water supply	69383	167125	276	3132	39461
3	Trade	0	0	0	0	0
4	Transport freight services	0	0	0	0	0
5	All non-tourism specific services	3801	11750	464	3279	47569
6	Processed food products	45872	0	0	0	27
7	Beverages	11466	0	0	0	0
8	Tobacco products	2	0	0	0	0
9	Readymade garments	2804	3928	0	0	78
10	Printing and publishing	60	674	0	13	128
11	Leather footwear	0	0	0	0	0
12	Travel related consumer goods	7	15	0	21	44
13	Soaps and cosmetics	192	0	0	0	121
14	Gems and jewellery	0	0	0	0	0
15	Railway passenger transport services	23	343	0	5	93
16	Land passenger transport including via pipeline	163	4428	24	6	122
17	Water passenger transport	0	0	0	0	0
18	Air passenger transport	64	56	0	11	34
19	Tourism related supporting and auxiliary transport activities	0	0	0	0	0
20	Hotels	2407	11711	28	64	52
21	Restaurants	7075	34429	81	189	151
22	Medical and health	0	0	0	0	0
23	Renting of transport equipment	1	1	1	1	1060
24	Cultural and religious services	39	94	4	92	1674
25	Sporting and recreational services	125	244	0	25	23685
IC-PP		631259	254289	879	6837	114931
GVA-basic prices		314277	409866	5570	43239	133144
CoE		86426	239194	866	25234	71934
OS/MI		195424	148029	3257	15656	17441
CFC		26045	18943	1301	1998	42461
net taxes on production		6436	4711	146	446	1665
GO-basic prices		945536	664155	6448	50076	248075
Employment (lakh)		2.29	2.79	0.06	0.57	0.55

**TSA Table 5: Production account of tourism industries and other industries, Gujarat  
2009-10**

Use table at purchasers' prices 25 X 25 products X industry, 2009-10 (Rs. lakh) Contd.

S. No.	Industry	IC	FD	output
1	Agriculture	2139025	5286732	7425757
2	Mining, other manufacturing, construction, electricity, gas and water supply	8162750	4971282	13134032
3	Trade	0	0	0
4	Transport freight services	0	0	0
5	All non-tourism specific services	1136022	3840076	4976099
6	Processed food products	123715	95247	218962
7	Beverages	18216	-4291	13925
8	Tobacco products	5333	24533	29866
9	Readymade garments	35099	170493	205592
10	Printing and publishing	22063	15244	37307
11	Leather footwear	843	9284	10127
12	Travel related consumer goods	5840	16478	22318
13	Soaps and cosmetics	13962	90269	104232
14	Gems and jewellery	42563	127799	170362
15	Railway passenger transport services	14224	159034	173258
16	Land passenger transport including via pipeline	226217	272018	498235
17	Water passenger transport	138	37646	37784
18	Air passenger transport	27047	-16256	10790
19	Tourism related supporting and auxiliary transport activities	426	13027	13452
20	Hotels	79830	20750	100580
21	Restaurants	234692	742998	977690
22	Medical and health	15841	648314	664155
23	Renting of transport equipment	2627	4078	6705
24	Cultural and religious services	8208	41703	49911
25	Sporting and recreational services	46786	183666	230452
IC-PP		12361465	16750125	29111590
GVA-basic prices		16510594	239531	0
CoE		4734054	0	0
OS/MI		10054130	0	0
CFC		1497828	0	0
net taxes on production		231392	0	0
GO-basic prices		28872059	0	0
Employment (lakh)		283.42	0.00	0.00

Source: NCAER computations

**TSA Table 6: Tourism direct output and value added at basic prices – Gujarat, 2009-10**

Industries	Gross output at basic prices	Intermediate Consumption	Gross value added at basic prices	State Tourism Industry Ratios	TDGVA
1. Agriculture	5336818	1186373	4150445	0.00	0
2. Mining, other manufacturing, construction, electricity, gas and water supply	10079890	7251295	2828595	0.00	21
3. Trade	4210208	698256	3511952	0.66	23347
4. transport freight services	904611	539488	365123	2.25	8203
5. All non-tourism specific services	4905741	669922	4235819	2.29	96999
6. Processed food products	233712	211124	22588	0.00	0
7. Beverages	5177	3903	1274	0.02	0
8. Tobacco products	16996	14720	2275	0.00	0
9. Readymade garments	139106	111098	28009	0.00	0
10. Printing and publishing	24672	20378	4294	0.00	0
11. Leather footwear	1857	1342	514	0.00	0
12. Travel related consumer goods	3744	2617	1128	0.00	0
13. Soaps and cosmetics	88416	65581	22835	0.00	0
14. Gems and jewellery	154093	126196	27897	0.00	0
15. Railway passenger transport services	173074	67167	105907	64.91	68745
16. Land passenger transport including via pipeline	487409	268347	219062	40.78	89327
17. Water passenger transport	35798	14665	21133	3.36	709
18. Air passenger transport	10962	6187	4775	35.95	1717
19. Tourism related supporting and auxiliary transport activities	13050	6197	6854	70.30	4818
20. Hotels	132434	88415	44018	73.94	32549
21. Restaurants	945536	631259	314277	23.69	74461
22. Medical and health	664155	254289	409866	42.71	175041
23. Renting of transport equipment	6448	879	5570	27.99	1559
24. Cultural and religious services	50076	6837	43239	8.94	3866
25. Sporting and recreational services	248075	114931	133144	2.01	2681
<b>Total</b>	<b>28872059</b>	<b>12361465</b>	<b>16510594</b>		<b>584043</b>
Share in State GVA					3.54

Source: NCAER computations

**TSA Table 7A: Employment in tourism industries by formal/informal and by gender - Gujarat, RURAL - 2009-10**

Industries	Number of Employees			Number of Employees		
	Formal			Informal		
	Male	Female	Total	Male	Female	Total
Tourism characteristic industries	Male	Female	Total	Male	Female	Total
Accommodation services/Hotels	23553	1915	25467	326179	11462	337641
Food and beverage serving services/Restaurants	1708	0	1708	17019	0	17019
Railway passenger transport services	104	0	104	21006	11462	32468
Land passenger transport services	1212	0	1212	0	0	0
Water passenger transport services	15823	0	15823	223628	0	223628
Air passenger transport services	0	0	0	294	0	294
Transport equipment rental services	0	0	0	0	0	0
Travel agencies and other reservation services/ Supporting and auxiliary passenger transport activities	0	0	0	0	0	0
Cultural and religious services	0	0	0	8366	0	8366
Sporting and other recreational services	0	0	0	24968	0	24968
Health and medical related services	0	0	0	2590	0	2590
Tourism connected industries	4706	1915	6621	28308	0	28308
Readymade garments	10586	0	10586	368371	41330	409701
Processed Food	0	0	0	70363	29964	100327
Tobacco products	2826	0	2826	16497	2539	19036
Beverages	0	0	0	0	0	0
Travel related consumer goods	6098	0	6098	0	0	0
footwear	1662	0	1662	0	0	0
Soaps, cosmetics and glycerine	0	0	0	4934	0	4934
Gems and jewellery	0	0	0	0	0	0
Book, journals, magazines, stationery etc.	0	0	0	275017	8826	283844

Source: NCAER computations based on NSSO 66<sup>th</sup> Round survey on "Employment Unemployment"

**TSA Table 7B: Employment in tourism industries by formal/informal and by gender - Gujarat, URBAN - 2009-10**

Industries	Number of Employees			Number of Employees		
	Formal			Informal		
	Male	Female	Total	Male	Female	Total
Tourism characteristic industries	151872	17584	169455	531858	133086	664944
Accommodation services/Hotels	393	0	393	6514	6493	13007
Food and beverage serving services/Restaurants	1320	740	2060	161071	16439	177511
Railway passenger transport services	11907	1674	13582	0	0	0
Land passenger transport services	11597	0	11597	246538	2122	248660
Water passenger transport services	6872	0	6872	3320	0	3320
Air passenger transport services	0	0	0	0	0	0
Transport equipment rental services	0	0	0	6092	0	6092
Travel agencies and other reservation services/ Supporting and auxiliary passenger transport activities	11565	0	11565	30389	0	30389
Cultural and religious services	0	0	0	20008	1674	21682
Sporting and other recreational services	23684	0	23684	12302	7957	20259
Health and medical related services	84535	15169	99704	45623	98401	144024
Tourism connected industries	18915	0	18915	766216	221649	987865
Readymade garments	0	0	0	265126	154759	419885
Processed Food	5488	0	5488	28955	7031	35986
Tobacco products	982	0	982	0	0	0
Beverages	0	0	0	13701	6541	20241
Travel related consumer goods	0	0	0	1588	0	1588
footwear	0	0	0	30836	29604	60440
Soaps, cosmetics and glycerine	0	0	0	1635	7872	9508
Gems and jewellery	10635	0	10635	395693	15842	411535
Book, journals, magazines, stationery etc.	1809	0	1809	28682	0	28682

Source: NCAER computations based on NSSO 66<sup>th</sup> Round survey on "Employment Unemployment"

**TSA Table 7C: Employment in tourism industries by formal/informal and by gender - Gujarat, TOTAL - 2009-10**

Industries	Number of Employees			Number of Employees		
	Formal			Informal		
	Male	Female	Total	Male	Female	Total
Tourism characteristic industries	175424	19498	194923	858036	144548	100258 <sub>5</sub>
Accommodation services/Hotels	2100	0	2100	23533	6493	30026
Food and beverage serving services/Restaurants	1424	740	2164	182077	27901	209978
Railway passenger transport services	13119	1674	14793	0	0	0
Land passenger transport services	27420	0	27420	470167	2122	472289
Water passenger transport services	6872	0	6872	3613	0	3613
Air passenger transport services	0	0	0	0	0	0
Transport equipment rental services	0	0	0	6092	0	6092
Travel agencies and other reservation services/ Supporting and auxiliary passenger transport activities	11565	0	11565	38755	0	38755
Cultural and religious services	0	0	0	44976	1674	46651
Sporting and other recreational services	23684	0	23684	14892	7957	22849
Health and medical related services	89241	17084	106325	73931	98401	172332
Tourism connected industries	29501	0	29501	113458	262978	139756 <sub>6</sub>
Readymade garments	0	0	0	335489 <sub>7</sub>	184723	520212
Processed Food	8314	0	8314	45452	9570	55022
Tobacco products	982	0	982	0	0	0
Beverages	6098	0	6098	13701	6541	20241
Travel related consumer goods	1662	0	1662	1588	0	1588
footwear	0	0	0	35769	29604	65374
Soaps, cosmetics and glycerine	0	0	0	1635	7872	9508
Gems and jewellery	10635	0	10635	670710	24668	695378
Book, journals, magazines, stationery etc.	1809	0	1809	30242	0	30242

Source: NCAER computations based on NSSO 66<sup>th</sup> Round survey on "Employment Unemployment"

**TSA Table 7D: Jobs in tourism industries by formal/informal and by gender - Gujarat, RURAL - 2009-10**

Industries	Number of Jobs			Number of Jobs		
	Formal			Informal		
	Male	Female	Total	Male	Female	Total
Tourism characteristic industries	23553	1915	25467	360093	11462	371555
Accommodation services/Hotels	1708	0	1708	17019	0	17019
Food and beverage serving services/Restaurants	104	0	104	21006	11462	32468
Railway passenger transport services	1212	0	1212	0	0	0
Land passenger transport services	15823	0	15823	245574	0	245574
Water passenger transport services	0	0	0	294	0	294
Air passenger transport services	0	0	0	0	0	0
Transport equipment rental services	0	0	0	0	0	0
Travel agencies and other reservation services/ Supporting and auxiliary passenger transport activities	0	0	0	8366	0	8366
Cultural and religious services	0	0	0	29136	0	29136
Sporting and other recreational services	0	0	0	10391	0	10391
Health and medical related services	4706	1915	6621	28308	0	28308
Tourism connected industries	10586	0	10586	370977	41330	412306
Readymade garments	0	0	0	72969	29964	102933
Processed Food	2826	0	2826	16497	2539	19036
Tobacco products	0	0	0	0	0	0
Beverages	6098	0	6098	0	0	0
Travel related consumer goods	1662	0	1662	0	0	0
footwear	0	0	0	4934	0	4934
Soaps, cosmetics and glycerine	0	0	0	0	0	0
Gems and jewellery	0	0	0	275017	8826	283844
Book, journals, magazines, stationery etc.	0	0	0	1560	0	1560

Source: NCAER computations based on NSSO 66<sup>th</sup> Round survey on "Employment Unemployment"

**TSA Table 7E: Jobs in tourism industries by formal/informal and by gender - Gujarat, URBAN - 2009-10**

Industries	Number of Jobs			Number of Jobs		
	Formal		Total	Informal		Total
	Male	Female		Male	Female	
Tourism characteristic industries	151872	17584	169455	560366	133336	693702
Accommodation services/Hotels	393	0	393	6514	6493	13007
Food and beverage serving services/Restaurants	1320	740	2060	178050	16689	194739
Railway passenger transport services	11907	1674	13582	0	0	0
Land passenger transport services	11597	0	11597	251977	2122	254099
Water passenger transport services	6872	0	6872	3320	0	3320
Air passenger transport services	0	0	0	0	0	0
Transport equipment rental services	0	0	0	6092	0	6092
Travel agencies and other reservation services/ Supporting and auxiliary passenger transport activities	11565	0	11565	30541	0	30541
Cultural and religious services	0	0	0	25697	1674	27371
Sporting and other recreational services	23684	0	23684	12552	7957	20509
Health and medical related services	84535	15169	99704	45623	98401	144024
Tourism connected industries	18915	0	18915	766216	231051	997268
Readymade garments	0	0	0	265126	164162	429288
Processed Food	5488	0	5488	28955	7031	35986
Tobacco products	982	0	982	0	0	0
Beverages	0	0	0	13701	6541	20241
Travel related consumer goods	0	0	0	1588	0	1588
footwear	0	0	0	30836	29604	60440
Soaps, cosmetics and glycerine	0	0	0	1635	7872	9508
Gems and jewellery	10635	0	10635	395693	15842	411535
Book, journals, magazines, stationery etc.	1809	0	1809	28682	0	28682

Source: NCAER computations based on NSSO 66<sup>th</sup> Round survey on "Employment Unemployment"

**TSA Table 7F: Jobs in tourism industries by formal/informal and by gender - Gujarat, TOTAL - 2009-10**

Industries	Number of Jobs			Number of Jobs		
	Formal		Total	Informal		Total
	Male	Female		Male	Female	
Tourism characteristic industries	175424	19498	194923	920459	144798	106525 <sub>7</sub>
Accommodation services/Hotels	2100	0	2100	23533	6493	30026
Food and beverage serving services/Restaurants	1424	740	2164	199056	28151	227206
Railway passenger transport services	13119	1674	14793	0	0	0
Land passenger transport services	27420	0	27420	497552	2122	499673
Water passenger transport services	6872	0	6872	3613	0	3613
Air passenger transport services	0	0	0	0	0	0
Transport equipment rental services	0	0	0	6092	0	6092
Travel agencies and other reservation services/ Supporting and auxiliary passenger transport activities	11565	0	11565	38907	0	38907
Cultural and religious services	0	0	0	54833	1674	56507
Sporting and other recreational services	23684	0	23684	22943	7957	30900
Health and medical related services	89241	17084	106325	73931	98401	172332
Tourism connected industries	29501	0	29501	113719 <sub>3</sub>	272381	140957 <sub>4</sub>
Readymade garments	0	0	0	338095	194126	532221
Processed Food	8314	0	8314	45452	9570	55022
Tobacco products	982	0	982	0	0	0
Beverages	6098	0	6098	13701	6541	20241
Travel related consumer goods	1662	0	1662	1588	0	1588
footwear	0	0	0	35769	29604	65374
Soaps, cosmetics and glycerine	0	0	0	1635	7872	9508
Gems and jewellery	10635	0	10635	670710	24668	695378
Book, journals, magazines, stationery etc.	1809	0	1809	30242	0	30242

Source: NCAER computations based on NSSO 66<sup>th</sup> Round survey on "Employment Unemployment"

TSA Table 10.1: Domestic and foreign tourism visits to states/UTs during 2010-2013

(in lakh)

State	2010		2011		2012		2013 (p)	
	Domestic	Foreign	Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
Andhra Pradesh	1557.90	3.23	1531.20	2.65	1557.90	3.23	1531.20	2.65
Arunachal Pradesh	2.28	0.03	2.33	0.05	2.28	0.03	2.33	0.05
Assam	40.51	0.15	43.39	0.16	40.51	0.15	43.39	0.16
Bihar	184.92	6.36	183.97	9.72	184.92	6.36	183.97	9.72
Goa	22.02	4.41	22.25	4.46	22.02	4.41	22.25	4.46
<b>Gujarat</b>	<b>188.61</b>	<b>1.31</b>	<b>210.17</b>	<b>1.66</b>	<b>188.61</b>	<b>1.31</b>	<b>210.17</b>	<b>1.66</b>
Haryana	69.15	1.06	59.88	1.30	69.15	1.06	59.88	1.30
Himachal Pradesh	128.74	4.54	146.05	4.85	128.74	4.54	146.05	4.85
Jammu & Kashmir	99.73	0.48	130.72	0.72	99.73	0.48	130.72	0.72
Karnataka	382.02	3.81	841.07	5.74	382.02	3.81	841.07	5.74
Kerala	85.95	6.59	93.81	7.33	85.95	6.59	93.81	7.33
Madhya Pradesh	380.80	2.50	441.20	2.70	380.80	2.50	441.20	2.70
Maharashtra	484.65	50.83	553.33	48.15	484.65	50.83	553.33	48.15
Manipur	1.14	0.00	1.35	0.01	1.14	0.00	1.35	0.01
Meghalaya	6.53	0.04	6.68	0.05	6.53	0.04	6.68	0.05
Mizoram	0.57	0.01	0.62	0.01	0.57	0.01	0.62	0.01
Nagaland	0.21	0.01	0.25	0.02	0.21	0.01	0.25	0.02
Orissa	75.92	0.50	82.71	0.61	75.92	0.50	82.71	0.61
Punjab	105.84	1.37	164.17	1.51	105.84	1.37	164.17	1.51
Rajasthan	255.44	12.79	271.37	13.52	255.44	12.79	271.37	13.52
Sikkim	7.00	0.21	5.52	0.24	7.00	0.21	5.52	0.24
Tamil Nadu	1116.37	28.05	1375.13	33.74	1116.37	28.05	1375.13	33.74
Tripura	3.42	0.05	3.60	0.06	3.42	0.05	3.60	0.06
Uttaranchal	302.06	1.27	259.46	1.25	302.06	1.27	259.46	1.25
Uttar Pradesh	1447.55	16.75	1554.30	18.87	1447.55	16.75	1554.30	18.87
Chhattisgarh	5.66	0.02	143.21	0.04	5.66	0.02	143.21	0.04
Jharkhand	68.85	0.16	107.96	0.72	68.85	0.16	107.96	0.72
West Bengal	210.72	11.92	222.57	12.13	210.72	11.92	222.57	12.13
Andaman & Nicobar Islands	1.81	0.15	2.02	0.16	1.81	0.15	2.02	0.16
Chandigarh	9.05	0.39	9.10	0.37	9.05	0.39	9.10	0.37
Daman & Diu	7.74	0.05	8.33	0.04	7.74	0.05	8.33	0.04
Delhi	135.58	18.94	154.29	21.60	135.58	18.94	154.29	21.60
Dadra & Nagar Haveli	4.96	0.02	4.22	0.01	4.96	0.02	4.22	0.01
Lakshadweep	0.08	0.02	0.09	0.01	0.08	0.02	0.09	0.01
Pondicherry	8.36	0.51	8.98	0.52	8.36	0.51	8.98	0.52
<b>All India</b>	<b>7402.14</b>	<b>178.53</b>	<b>8645.33</b>	<b>194.97</b>	<b>7402.14</b>	<b>178.53</b>	<b>8645.33</b>	<b>194.97</b>

Source: India Tourism Statistics

**TSA Table 10.2: Average number of overnight trips per 100 households in different state /UTs, last 365 days**

State	Average number of overnight trips		
	Rural	Urban	Total
Andhra Pradesh	469	416	453
Arunachal Pradesh	332	171	297
Assam	223	258	227
Bihar	336	333	335
Chhattisgarh	370	366	370
Delhi	166	237	232
Goa	295	322	308
<b>Gujarat</b>	<b>422</b>	<b>370</b>	<b>402</b>
Haryana	578	424	530
Himachal Pradesh	791	593	769
Jammu & Kashmir	904	601	836
Jharkhand	343	360	346
Karnataka	384	376	381
Kerala	444	446	445
Madhya Pradesh	498	469	491
Maharashtra	453	269	371
Manipur	189	131	173
Meghalaya	279	178	260
Mizoram	232	188	212
Nagaland	317	293	310
Orissa	552	479	541
Punjab	504	417	470
Rajasthan	541	447	516
Sikkim	346	296	338
Tamil Nadu	334	328	331
Tripura	307	326	310
Uttaranchal	434	380	422
Uttar Pradesh	493	432	480
West Bengal	393	308	371
Andaman & Nicobar Island	418	181	340
Chandigarh	191	265	256
Dadra & Nagar Haveli	153	259	179
Daman & Diu	100	211	139
Lakshadweep	184	293	231
Puducherry	455	429	437
<b>All India</b>	<b>440</b>	<b>365</b>	<b>418</b>

Source: NCAER's computations based on NSSO's Domestic Tourism Survey

**TSA Table 10.3: Percentage of households and persons undertaking overnight trips: states/UTs, last 365 days**

State	Households			Persons		
	Rural	Urban	Total	Rural	Urban	Total
Andhra Pradesh	94.6	93.2	94.2	87.93	84.04	86.78
Arunachal Pradesh	70.3	61.5	68.5	38.04	30.83	36.55
Assam	79.8	88.6	80.8	50.65	59.05	51.48
Bihar	84.5	87.4	84.8	59.85	61.33	60.00
Chhattisgarh	92.5	91.9	92.4	84.28	84.20	84.27
Delhi	85.0	86.6	86.5	62.79	73.09	72.23
Goa	89.2	78.0	83.6	82.49	68.54	75.78
<b>Gujarat</b>	<b>93.4</b>	<b>90.0</b>	<b>92.1</b>	<b>79.36</b>	<b>76.83</b>	<b>78.42</b>
Haryana	95.7	89.7	93.8	82.05	79.72	81.39
Himachal Pradesh	99.8	86.0	98.3	89.80	88.56	89.70
Jammu & Kashmir	93.9	87.7	92.5	76.71	68.64	75.06
Jharkhand	92.6	92.5	92.6	76.77	79.22	77.13
Karnataka	88.6	94.9	90.9	78.97	85.73	81.25
Kerala	84.4	80.1	83.3	70.68	65.85	69.45
Madhya Pradesh	97.3	94.7	96.7	84.73	82.18	84.14
Maharashtra	94.5	85.1	90.3	80.12	71.64	76.55
Manipur	60.7	57.8	59.9	20.92	18.57	20.28
Meghalaya	77.1	70.3	75.8	45.54	43.03	45.12
Mizoram	65.1	59.3	62.5	26.29	21.95	24.35
Nagaland	82.2	89.8	84.4	39.84	45.29	41.29
Orissa	95.9	94.9	95.7	80.50	83.57	80.95
Punjab	90.5	90.0	90.3	83.20	82.27	82.87
Rajasthan	98.4	97.1	98.1	85.69	80.95	84.53
Sikkim	93.9	100.0	94.8	68.46	88.65	70.67
Tamil Nadu	90.6	91.6	91.1	81.75	83.97	82.74
Tripura	94.1	93.0	93.9	71.30	76.88	72.22
Uttaranchal	94.6	94.2	94.5	78.62	79.21	78.75
Uttar Pradesh	96.3	94.1	95.8	77.53	78.44	77.72
West Bengal	93.3	81.4	90.2	79.30	70.26	77.22
Andaman & Nicobar Islands	86.9	75.7	83.2	72.00	58.68	67.66
Chandigarh	99.7	78.1	80.7	88.78	59.84	62.73
Dadra & Nagar Haveli	64.7	92.2	71.6	38.55	82.02	46.44
Daman & Diu	45.7	70.3	54.2	39.68	60.19	45.99
Lakshadweep	100.0	87.8	96.0	82.00	44.30	63.86
Puducherry	90.6	88.3	89.0	81.41	79.02	79.71
<b>All India</b>	<b>92.6</b>	<b>89.9</b>	<b>91.8</b>	<b>77.41</b>	<b>77.31</b>	<b>77.38</b>

Source: NCAER's computations based on NSSO's Domestic Tourism Survey

**TSA Table 10.4: Share of States in the total households reporting overnight visitor(s) and total number of overnight visitor(s), separately for each State/UTs**

(in lakh)

State	Rural		Urban		Total	
	Share in total households reporting overnight visitors	Share in total number of overnight visitors	Share in total households reporting overnight visitors	Share in total number of overnight visitors	Share in total households reporting overnight visitors	Share in total number of overnight visitors
Andhra Pradesh	9.3	8.4	10.0	9.2	9.5	8.6
Arunachal Pradesh	0.1	0.1	0.1	0.0	0.1	0.0
Assam	2.6	2.2	1.0	0.8	2.2	1.8
Bihar	7.9	7.1	2.5	2.1	6.3	5.8
Chhattisgarh	2.3	2.7	1.3	1.5	2.0	2.4
Delhi	0.1	0.1	3.7	3.6	1.1	1.0
Goa	0.1	0.1	0.2	0.2	0.1	0.1
<b>Gujarat</b>	<b>4.3</b>	<b>4.4</b>	<b>6.6</b>	<b>6.9</b>	<b>4.9</b>	<b>5.1</b>
Haryana	2.1	2.4	2.2	2.5	2.1	2.4
Himachal Pradesh	0.9	0.9	0.2	0.2	0.7	0.7
Jammu & Kashmir	0.7	0.8	0.5	0.5	0.7	0.7
Jharkhand	2.6	2.6	1.2	1.3	2.2	2.3
Karnataka	4.6	4.7	7.2	7.2	5.4	5.4
Kerala	3.3	2.8	2.7	2.4	3.1	2.7
Madhya Pradesh	6.2	6.9	4.8	5.5	5.8	6.5
Maharashtra	7.9	7.7	14.0	13.6	9.7	9.3
Manipur	0.1	0.1	0.1	0.1	0.1	0.1
Meghalaya	0.2	0.2	0.1	0.1	0.2	0.1
Mizoram	0.0	0.0	0.1	0.0	0.1	0.0
Nagaland	0.1	0.1	0.1	0.1	0.1	0.1
Orissa	4.6	4.3	2.1	2.1	3.8	3.7
Punjab	2.1	2.4	3.2	3.4	2.4	2.7
Rajasthan	5.7	6.7	5.1	5.5	5.6	6.4
Sikkim	0.1	0.1	0.0	0.0	0.1	0.0
Tamil Nadu	5.7	4.9	12.4	11.0	7.6	6.5
Tripura	0.4	0.4	0.2	0.2	0.4	0.3
Uttaranchal	0.9	1.0	0.6	0.7	0.8	0.9
Uttar Pradesh	16.2	18.0	10.9	12.9	14.7	16.6
West Bengal	8.6	8.1	6.4	5.9	8.0	7.5
Andaman & Nicobar Islands	0.0	0.0	0.0	0.0	0.0	0.0
Chandigarh	0.0	0.0	0.3	0.2	0.1	0.1
Dadra & Nagar	0.0	0.0	0.0	0.0	0.0	0.0
Daman & Diu	0.0	0.0	0.0	0.0	0.0	0.0
Lakshadweep	0.0	0.0	0.0	0.0	0.0	0.0
Puducherry	0.1	0.0	0.3	0.3	0.1	0.1
<b>All India</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: NCAER's computations based on NSSO's Domestic Tourism Survey

**TSA Table 10.5: Per 1000 distribution of overnight visitor-trips by purpose of trip separately for each State/UTs of destination**

State of main destination	Purpose								
	Business	Leisure	Social	Religious	Education & training	Health & medical	Shopping	Others	All
Andhra Pradesh	14	23	734	134	4	56	1	33	1000
Arunachal Pradesh	99	28	369	93	43	100	118	140	1000
Assam	55	23	694	63	14	109	8	34	1000
Bihar	22	15	767	66	7	104	5	13	1000
Chhattisgarh	16	30	822	63	7	44	5	12	1000
Delhi	55	49	693	21	37	56	16	72	1000
Goa	46	197	489	222	29	10	0	7	1000
<b>Gujarat</b>	<b>14</b>	<b>21</b>	<b>771</b>	<b>140</b>	<b>7</b>	<b>38</b>	<b>1</b>	<b>8</b>	<b>1000</b>
Haryana	10	5	858	39	2	58	0	27	1000
Himachal Pradesh	18	49	701	142	10	43	12	26	1000
Jammu & Kashmir	11	35	743	145	18	20	5	24	1000
Jharkhand	13	31	764	87	8	79	3	14	1000
Karnataka	16	34	710	178	6	32	0	24	1000
Kerala	12	24	730	84	5	78	0	67	1000
Madhya Pradesh	13	12	838	73	4	45	2	12	1000
Maharashtra	13	21	704	175	4	67	2	14	1000
Manipur	140	21	445	71	26	144	90	60	1000
Meghalaya	68	96	585	64	11	102	12	62	1000
Mizoram	196	90	480	46	26	77	48	36	1000
Nagaland	210	36	318	82	53	121	18	162	1000
Orissa	24	51	747	52	4	87	8	27	1000
Punjab	15	7	826	93	6	33	0	20	1000
Rajasthan	9	10	787	100	8	58	1	27	1000
Sikkim	39	138	438	121	22	72	5	165	1000
Tamil Nadu	11	42	689	195	4	39	1	18	1000
Tripura	3	49	837	12	3	68	0	22	1000
Uttaranchal	18	49	496	359	8	23	14	33	1000
Uttar Pradesh	12	15	823	62	8	48	3	30	1000
West Bengal	13	57	789	35	3	78	1	24	1000
Andaman & Nicobar Islands	30	146	670	26	16	57	20	36	1000
Chandigarh	11	83	627	45	31	157	1	45	1000
Dadra & Nagar Haveli	1	2	973	2	1	21	0	0	1000
Daman & Diu	0	410	272	317	0	0	0	0	1000
Lakshadweep	11	213	671	13	2	50	0	40	1000
Puducherry	0	50	750	122	16	51	0	10	1000
Non-Response	27	15	566	175	5	63	1	37	1000
<b>All India</b>	<b>15</b>	<b>26</b>	<b>760</b>	<b>107</b>	<b>6</b>	<b>58</b>	<b>2</b>	<b>26</b>	<b>1000</b>
Estd. no. of visitor-trips ('000)	30991	52751	1611817	222832	12505	126200	5413	54573	2117446

Source: NCAER's computations based on NSSO's Domestic Tourism Survey

**TSA Table 10.6: Average no. of places visited per overnight trip by main destination for each State/UTs of destination**

State of destination	Main destination		
	Within the district	Outside the district but within the state	Outside State
Andhra Pradesh	1.1	1.2	1.6
Arunachal Pradesh	1.1	1.2	1.3
Assam	1.1	1.4	1.4
Bihar	1.0	1.3	1.4
Chhattisgarh	1.1	1.1	1.9
Delhi	1.3	1.0	1.2
Goa	1.0	1.0	2.0
<b>Gujarat</b>	<b>1.0</b>	<b>1.4</b>	<b>2.0</b>
Haryana	1.1	1.2	1.2
Himachal Pradesh	1.0	1.1	1.9
Jammu & Kashmir	1.1	1.2	2.1
Jharkhand	1.0	1.2	1.5
Karnataka	1.0	1.3	1.7
Kerala	1.1	1.2	1.7
Madhya Pradesh	1.0	1.1	1.3
Maharashtra	1.1	1.3	1.8
Manipur	1.0	1.1	2.9
Meghalaya	1.0	1.0	1.8
Mizoram	1.0	1.0	2.8
Nagaland	1.3	1.6	1.4
Orissa	1.0	1.2	1.6
Punjab	1.0	1.1	1.1
Rajasthan	1.0	1.1	1.5
Sikkim	1.0	1.1	2.9
Tamil Nadu	1.1	1.2	1.6
Tripura	1.0	1.0	2.6
Uttaranchal	1.0	1.1	1.8
Uttar Pradesh	1.0	1.1	1.3
West Bengal	1.0	1.1	1.6
Andaman & Nicobar Islands	1.1	1.3	0.0
Chandigarh	1.0	1.0	1.4
Dadra & Nagar Haveli	1.0	1.2	1.0
Daman & Diu	1.0	1.0	1.2
Lakshadweep	1.0	0.0	1.8
Puducherry	1.1	1.1	1.2
<b>All India</b>	<b>1.0</b>	<b>1.2</b>	<b>1.5</b>

Source: NCAER's computations based on NSSO's Domestic Tourism Survey

**TSA Table 10.7A: Per 1000 distribution of households who are aware of 'Incredible India' campaign and other tourism promotional campaigns by source of information about the campaign**

Source of information	Gujarat					
	Incredible India Campaign			Other promotional campaigns		
	Rural	Urban	Total	Rural	Urban	Total
Newspaper/Magazine	175	128	440	310	525	144
Radio	13	37	21	31	14	28
TV	808	733	365	363	366	759
Internet	0	0	2	0	3	0
Billboard/ Hoarding	0	0	90	191	23	0
More than one of these	2	101	54	39	65	66
Others	2	1	29	67	4	1
Any/Some/ All of these	1000	1000	1000	1001	1000	1000

Source: NCAER's computations based on NSSO's Domestic Tourism Survey

**TSA Table 10.7B: Per 1000 distribution of households who are aware of 'Incredible India' campaign and other tourism promotional campaigns by source of information about the campaign**

Source of information	All India					
	Incredible India Campaign			Other promotional campaigns		
	Rural	Urban	Total	Rural	Urban	Total
Newspaper/Magazine	145	139	142	172	272	220
Radio	82	22	47	113	30	73
TV	547	661	614	318	385	350
Internet	3	20	13	1	8	5
Billboard/ Hoarding	10	5	7	66	40	53
More than one of these	186	145	162	265	248	257
Others	27	8	16	65	17	42
Any/Some/ All of these	1000	1000	1000	1000	1000	1000

Source: NCAER's computations based on NSSO's Domestic Tourism Survey

**TSA Table 10.8A: Per 1000 distribution of households who are aware of 'Incredible India' campaign and other tourism promotional campaigns by impact of the campaign**

Source of information	Gujarat					
	Incredible India Campaign			Other promotional campaigns		
	Rural	Urban	Total	Rural	Urban	Total
Resulted into one or more trips	64	85	78	111	138	128
Planning to make a trip in near future	178	134	149	162	133	144
Willing to make a trip but could not make it due to other constraints	304	427	384	448	323	373
No impact	443	268	329	255	171	204
Cannot say	12	87	60	24	234	151
Total	1000	1000	1000	1000	1000	1000

Source: NCAER's computations based on NSSO's Domestic Tourism Survey

**TSA Table 10.8B: Per 1000 distribution of households who are aware of 'Incredible India' campaign and other tourism promotional campaigns by impact of the campaign**

Source of information	All India					
	Incredible India Campaign			Other promotional campaigns		
	Rural	Urban	Total	Rural	Urban	Total
Resulted into one or more trips	32	45	40	43	65	54
Planning to make a trip in near future	143	169	158	131	155	143
Willing to make a trip but could not make it due to other constraints	406	406	406	442	422	433
No impact	341	315	326	321	290	306
Cannot say	78	64	70	62	67	65
Total	1000	1000	1000	1000	1000	1000

Source: NCAER's computations based on NSSO's Domestic Tourism Survey



## 6. SUMMARY OF FINDINGS

### Number of trips

- Total domestic or intrastate trips undertaken in Gujarat were 4.02 crore in 2008-09 (DTS, 2008-09). This amounts to 4.28 per cent of the total domestic trips undertaken in India.
- In addition to this, 36.8 lakh trips were undertaken in the state from the other states of India, constituting a part of inbound tourism activity in the state (DTS, 2008-09). The other part relates to the tourism activity by 1,30,739 tourists visiting the state from other countries (MoT Report).
- With respect to outbound tourism, a total of 9.11 lakh people living in Gujarat undertook foreign trips during 2010-11 (IPS, 2010-11). This is 8.41 per cent of the total outbound tourists of India (Table 6.1).

**Table 6.1: Number of trips / tourists**

Item	Gujarat	All India	Share of Gujarat in All- India
Total domestic trips (No.) - within state	4,01,87,234	939,032,132	4.28
Total Inbound trips (No.) – from other states	36,82,566	-	
Total Inbound tourists (No.) – from other countries	1,30,739	6,603,897	1.98
Total outbound tourists (No.) – to other countries	9,11,436	10,842,124	8.41

Source: NCAER computations

### Internal tourism expenditure

- Internal Tourism Expenditure comprises of Domestic, Inbound and Outbound Tourism Expenditure. Adding the imputed consumption to this gives the Total Internal Tourism Consumption.
- The total Internal Tourism Expenditure of the state comes out to be Rs. 23,39,256 lakh which is 4.56 per cent of the total Tourism Expenditure for India (Table 6.2).

**Table 6.2: Internal Tourism Expenditure (Rs. lakh)**

Item	Gujarat	All India	Share of Gujarat in All-India (%)
1. Domestic Tourism Expenditure	16,30,617	39,296,109	4.15
2. Inbound Tourism Expenditure	6,14,792	9,967,885	6.17
- Total Expenditure on trips from other states	4,17,455	-	
- Total Expenditure on trips from other countries	1,97,337	9,967,885	1.98
3. Outbound Tourism Expenditure	93,847	1,014,854	9.25
<b>4. Gross Internal Tourism Expenditure (1+2+3)</b>	<b>23,39,256</b>	<b>50,278,848</b>	<b>4.65</b>

Source: NCAER computations

### Employment in tourism industries

- The overall workforce (number of jobs) in Gujarat was 2.83 crore in 2009-10.
- The number of jobs in tourism characteristic industries in the state stood at 12.6 lakh. This refers to the tourism employment of the state.
- **The direct share of tourism employment in total state employment is 4.45 per cent, as compared to the corresponding national share of 4.37 per cent (Table 6.3).**

**Table 6.3: Employment in tourism industries**

	Gujarat	All India
<b>Total Employment (in lakh)</b>	<b>283.42</b>	<b>5,355.4</b>
Tourism Characteristic Industries	12.60	234.2
Tourism Connected Industries	14.39	203.7
Tourism Specific Industries	26.99	437.9
<b>Shares in Total Employment (%)</b>		
<b>Tourism Characteristic Industries</b>	<b>4.45</b>	<b>4.37</b>
Tourism Connected Industries	5.08	3.80
Tourism Specific Industries	9.52	8.18

Source: NCAER computations

**Gross Value Added**

- According to the Supply and Use Table of the state, prepared using the state GSDP accounts, the Gross Value Added (GVA) of all industries was Rs. 1,65,10,594 lakh for the reference year of 2009-10.
- The GVA of Tourism characteristic industries (GVATI) works out to be Rs. 13,07,844 lakh, which is 7.92 per cent of the total state GVA or GSDP (Table 6.4).

**Table 6.4: Gross Value Added of tourism industries**

	Gujarat	All India
<b>Gross Value Added (GVA) at basic prices</b>	<b>1,65,10,594</b>	<b>61,86,95,000</b>
Tourism Characteristic Industries (GVATI)	13,07,844	4,42,92,221
Tourism Connected Industries	1,10,815	1,82,16,126
Tourism Specific Industries (1+2)	14,18,659	6,25,08,347
<b>Shares in GVA</b>		
Tourism Characteristic Industries (GVATI)	7.92	7.16
Tourism Connected Industries	0.67	2.94
Tourism Specific Industries	8.59	10.1
<b>Tourism Direct GVA</b>	<b>5,84,043</b>	<b>2,34,91,181</b>
<b>Share of TDGVA in total GVA</b>	<b>3.54</b>	<b>3.80</b>

Source: NCAER computations

**Direct and indirect shares in GSDP & employment**

- The Tourism Direct GVA (TDGVA) for the state is Rs. 5,84,043 lakh.
- The share of TDGVA in the state GVA is 3.54 per cent. This is the direct share of tourism in the state GDP.
- Using the GVA and employment multipliers, we arrive at the direct and indirect contribution of tourism in the state GDP and employment respectively.
- These multipliers have been computed for the state of reference using the Input-Output analysis and are given in Table 6.5. The direct plus indirect shares in GDP and employment are obtained by multiplying their direct shares with the respective multipliers.

- The overall (direct + indirect) share of tourism in the state GDP is 7.39 per cent which is the share of TDGVA in overall GVA.
- And the overall (direct + indirect) share of tourism employment in total state employment is 13.17 per cent (Table 6.5).

**Table 6.5: Contribution of Tourism in the Economy**

	Gujarat	All India
TDGVA - direct	3.54	3.80
GVATI-direct	7.92	7.16
Tourism Employment - direct	4.45	4.37
GVA multipliers	2.0905	1.843
Employment multipliers	2.9627	2.3256
TDGVA - direct and indirect	7.39	7.00
GVATI-direct and indirect	16.56	13.19
Tourism Employment - direct and indirect	13.17	10.17

Source: NCAER computations

## GLOSSARY



GLOSSARY<sup>24</sup>

<b>Basic price</b>	The basic price is the amount receivable by the producer from the purchaser for a unit of a good or service produced as output minus any tax payable, and plus any subsidy receivable, on that unit as a consequence of its production or sale; it excludes any transport charges invoiced separately by the producer.
<b>Business and government tourism consumption</b>	Also referred to as internal tourism consumption by domestic business and government visitors. Consists of the tourism consumption by resident businesses or governments on tourism related products within the economy.
<b>Central product classification (CPC)</b>	The central product classification (CPC) is a classification based on the physical characteristics of goods or on the nature of the services rendered; each type of good or service distinguished in the CPC is defined in such a way that it is normally produced by only one activity as defined in ISIC.
<b>CIF price</b>	The CIF price (i.e. cost, insurance and freight price) is the price of a good delivered at the frontier of the importing country, including any insurance and freight charges incurred to that point, or the price of a service delivered to a resident, before the payment of any import duties or other taxes on imports or trade and transport margins within the country; in SNA 1993 this concept is applied only to detailed imports.
<b>Compensation of employees</b>	Compensation of employees is the total remuneration, in cash or in kind, payable by an enterprise to an employee in return for work done by the latter during the accounting period.
<b>Consumption of fixed capital</b>	Consumption of fixed capital represents the reduction in the value of the fixed assets used in production during the accounting period resulting from physical deterioration, normal obsolescence or normal accidental damage.
<b>Direct tourism gross domestic product</b>	Is direct tourism gross value added plus net taxes on products that are attributable to the tourism industry (tourism net taxes on products). Direct tourism GDP will generally have a higher value than direct tourism value added. Direct tourism GDP is a satellite account construct to enable a direct comparison with the most widely recognised national accounting aggregate, GDP. While it is useful in this context, the direct tourism gross value added measure should be used when making comparisons with other industries or between countries. See also Direct tourism gross value added and Tourism net taxes on products.

<sup>24</sup> Sources of glossary:

1. United Nations World Tourism Organisation (UNWTO): International Recommendations for Tourism Statistics (IRTS), 2008
2. Tourism Satellite Account: Recommended Methodological Framework, 2008: World Tourism Organisation (WTO), United Nations (UN), Eurostat, and Organisation for Economic Cooperation and Development (OECD)
3. European System of Accounts – ESA 1995
4. United Nations Statistics Division: National Accounts Statistics, 1993 System of National Accounts (<http://unstats.un.org/unsd/sna1993/glossary.asp?letter=S>)

<b>Direct tourism gross value added</b>	The value of direct tourism output at basic prices, less the value of the inputs used in producing these tourism products. This measure is directly comparable with the value added of 'conventional' industries such as mining and manufacturing and should also be used for comparisons across countries. See also Direct tourism output and Direct tourism GDP.
<b>Direct tourism output</b>	The value of goods and services, at basic prices, which are consumed by visitors and produced in the economy by industries in a direct relationship with visitors.
<b>Domestic output</b>	Domestic output is output produced by resident enterprises.
<b>Domestic tourism</b>	The travel of domestic visitors is called domestic tourism. It comprises the activities of a resident visitor within the country of reference either as part of a domestic tourism trip or part of an outbound tourism trip.
<b>Domestic tourism consumption</b>	Consists of the tourism consumption by resident visitors on tourism related products within the economy. It is the sum of household tourism consumption and business and government tourism consumption.
<b>Domestic travel</b>	Travel within a country by residents is called domestic travel.
<b>Domestic travellers</b>	Those who undertake domestic travel are domestic travellers.
<b>Domestic trip</b>	A domestic trip is one with a main destination within the country of residence of the visitor.
<b>Domestic visitor</b>	A domestic traveller qualifies as a domestic visitor if: (a) he/she is on a tourism trip and (b) he/she is a resident travelling in the country of reference.  Domestic visitors are those who travel within the country to a place other than their usual place of residence and stay at hotels or other accommodation establishments run on commercial basis or in dharamshalas/sarais/musafir khanas/ agrashalas/ choultries, etc for a duration of not less than 24 hours or one night and for not more than 12 months at a time.
<b>Durable consumer goods</b>	Durable goods are goods that "may be used repeatedly or continuously over a period of a year or more, assuming a normal or average rate of physical usage". When acquired by producers, these are considered to be capital goods used for production processes as is the case of vehicles, computers, etc. When acquired by households, they are considered to be consumer durable goods.
<b>Economic activity</b>	Any activity resulting in production of goods and services that add value to national product is considered as an economic activity. Such activities include production of all goods and services for market (market activities), i.e. production for pay or profit, and, among the non-market activities, the production of goods and household services with paid domestic employees and owner occupied dwellings for own consumption and own account production of fixed assets.
<b>Employed persons</b>	Employed (or worker) persons are those who are engaged in any economic activity or who, despite their attachment to economic activity, abstain from work for reason of illness, injury or other physical disability, bad weather, festivals, social or religious functions or other contingencies necessitating temporary absence from work.

<b>Employed persons</b>	Number of persons usually employed in the principal and subsidiary statuses.
<b>Employed as per principal activity status</b>	Those in labour force pursuing some economic activity for major time during the reference period of 365 days
<b>Employed as per subsidiary activity status</b>	Those in labour force pursuing some economic activity for a relatively shorter time (minor time) during the reference period of 365 days
<b>Enterprise</b>	An enterprise is an institutional unit in its capacity as a producer of goods and services; an enterprise may be a corporation, a quasi-corporation, a non-profit institution, or an unincorporated enterprise.
<b>Establishment</b>	An establishment is an enterprise or part of an enterprise that is situated in a single location and in which only a single (non-ancillary) productive activity is carried out or in which the principal productive activity accounts for most of the value added.
<b>Exports of goods</b>	Exports of goods consist of exports of the following items from residents to non-residents: generally with a change of ownership being involved: general merchandise, goods for processing, goods procured in domestic ports by non-resident carriers and non-monetary gold.
<b>Exports of services</b>	Exports of services consist of exports of the following services provided by residents to non-residents: transportation; travel; communications; construction; insurance; financial; computer and information; royalties and licence fees; other business services; personal, cultural, and recreational services; and government services n.i.e.
<b>Excursionist</b>	Same day visitors are called excursionists.
<b>Final demand</b>	Transactions that involve purchases of produced goods and services for final uses are presented in final demand table. The "final" use for a good or service is that it is not used up entirely in the reference year as an intermediate input in the production of some other good or service. Transactions for goods and services that are completely used to produce other goods and services are shown in the intermediate input (or use) table of the accounts.
<b>Final output</b>	This is that part of total output of each industry sold either for final consumption by households, general government or for investment (including additions to inventories) and for export. In short, it represents total output sold to final buyers. For the whole economy, total final output is equal to the value of goods and services (both domestically produced and imported) available for consumption, investment and export.
<b>Final consumption</b>	Final consumption consists of goods and services used up by individual households or the community to satisfy their individual or collective needs or wants.
<b>Final consumption expenditure of government</b>	Government final consumption expenditure consists of expenditure, including imputed expenditure, incurred by general government on both individual consumption goods and services and collective consumption services.

<b>Final consumption expenditure of households</b>	Household final consumption expenditure consists of the expenditure, including imputed expenditure, incurred by resident households on individual consumption goods and services, including those sold at prices that are not economically significant.
<b>Final consumption expenditure of NPISHs</b>	Final consumption expenditure of NPISHs (non-profit institutions serving households) consists of the expenditure, including imputed expenditure, incurred by resident NPISHs on individual consumption goods and services.
<b>FOB price</b>	The FOB price (free on board price) of exports and imports of goods is the market value of the goods at the point of uniform valuation, (the customs frontier of the economy from which they are exported); it is equal to the CIF price less the costs of transportation and insurance charges, between the customs frontier of the exporting (importing) country and that of the importing (exporting) country.
<b>General government</b>	The general government sector consists of the totality of institutional units which, in addition to fulfilling their political responsibilities and their role of economic regulation, produce principally non-market services (possibly goods) for individual or collective consumption and redistribute income and wealth.
<b>GDP</b>	Is the total market value of goods and services produced in the economy within a given period after deducting the cost of goods and services used up in the process of production but before deducting allowances for the consumption of fixed capital. Thus gross domestic product, as here defined, is 'at market prices'.
<b>Gross</b>	The term "gross" is a common means of referring to values before deducting consumption of fixed capital (generally used as in "gross capital stock" or "gross domestic product").
<b>Gross domestic product - expenditure based</b>	Expenditure-based gross domestic product is total final expenditures at purchasers' prices (including the FOB value of exports of goods and services), less the FOB value of imports of goods and services.
<b>Gross domestic product - income based</b>	Income-based gross domestic product is compensation of employees, plus taxes less subsidies on production and imports, plus gross mixed income, plus gross operating surplus.
<b>Gross domestic product - output based</b>	Output-based gross domestic product is the sum of the gross values added of all resident producers at basic prices, plus all taxes less subsidies on products. Output-based GDP is the sum of the gross values added of all resident producers at producers' prices, plus taxes less subsidies on imports, plus all non-deductible VAT (or similar taxes).
<b>Gross fixed capital formation</b>	Gross fixed capital formation is measured by the total value of a producer's acquisitions, less disposals, of fixed assets during the accounting period plus certain additions to the value of non-produced assets (such as subsoil assets or major improvements in the quantity, quality or productivity of land) realised by the productive activity of institutional units.
<b>Gross margin</b>	The gross margin of a provider of reservation services is the difference between the value at which the intermediated service is sold and the value accrued to the provider of reservation services for this intermediated service.

<b>Gross value added</b>	Gross value added is the value of output less the value of intermediate consumption; it is a measure of the contribution to GDP made by an individual producer, industry or sector; gross value added is the source from which the primary incomes of the SNA are generated and is therefore carried forward into the primary distribution of income account.
<b>Gross value added at basic prices</b>	Gross value added at basic prices is output valued at basic prices less intermediate consumption valued at purchasers' prices.
<b>Gross value added of the tourism industries (GVATI)</b>	Gross value added of the tourism industries is the total gross value added of all establishments belonging to tourism industries, regardless of whether all their output is provided to visitors and of the degree of specialization of their production process.
<b>Household tourism Consumption</b>	Consists of the tourism consumption by resident households on tourism related products within economy.
<b>Imports of goods</b>	Imports of goods consist of imports of the following items from non-residents to residents, generally with a change of ownership being involved: general merchandise, goods for processing, goods procured in foreign ports by domestic carriers, and non-monetary gold.
<b>Imports of services</b>	Imports of services consist of the following services purchased by residents from non-residents: transportation; travel; communications; construction; insurance; financial; computer and information; royalties and licence fees; other business services; personal, cultural, and recreational services; and government services n.i.e.
<b>Imports of goods and services</b>	Imports of goods and services consist of purchases, barter, or receipts of gifts or grants, of goods and services by residents from non-residents; the treatment of exports and imports in the SNA is generally identical with that in the balance of payments accounts as described in the Balance of Payments Manual.
<b>Imputed tourism consumption</b>	Consists of imputations made for the consumption by visitors of certain goods and services for which they do not make a payment. Imputation is confined to a small number of cases where a reasonably satisfactory basis for the valuation of the implied transaction is available, and where their inclusion is consistent with the production boundary in the core national accounts.
<b>Inbound travel</b>	Travel to a country by non-residents is called inbound travel.
<b>Inbound trip</b>	An inbound trip is one with a main destination outside the country of residence of the visitor.
<b>Inbound tourism</b>	The travel of inbound visitors is called inbound tourism. It comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip.
<b>Inbound tourism consumption</b>	Inbound tourism consumption is the tourism consumption of a non-resident visitor within the economy of reference.

<b>Input-output model</b>	It provides a detailed breakdown of economic activity among business industries and a detailed breakdown of their inputs and outputs by commodity associated with some arbitrarily fixed exogenous demand. It also provides supply requirements from other sources such as imports and government production of goods and services. The input-output model is a structural model dealing primarily with resource allocation in the economy corresponding to an exogenously given demand.
<b>Input-output tables</b>	Input-output tables are derived from Supply and Use Tables, which show the process of flows of goods and services through the economic system between producers and consumers. The transactors involved in the production process are individuals (persons or households), establishments (production units of businesses and governments), non-business entities such as non-profit institutions, and governments. An input-output table presents a detailed analysis of the process of production and the use of goods and services (products) and the income generated in that production.; they can be either in the form of (a) supply and use tables or (b) symmetric input-output tables. These tables include the Imports Use and Domestic Use matrices, industry by industry and product by product matrices plus the Leontief inverse, multipliers and other analyses of their structure.
<b>Intermediate consumption</b>	Intermediate consumption consists of the value of the goods and services consumed as inputs by a process of production, excluding fixed assets whose consumption is recorded as consumption of fixed capital; the goods or services may be either transformed or used up by the production process.
<b>Intermediate output</b>	That part of the total output of each industry consumed by other industries in the production process.
<b>Internal tourism</b>	Comprises domestic tourism and inbound tourism, that is, the activities of resident and non-resident visitors within the country of reference as part of domestic or international tourism trips.
<b>Internal tourism consumption</b>	Internal tourism consumption is the tourism consumption of both resident and non-resident visitors within the economy of reference. It is the sum of domestic tourism consumption and inbound tourism consumption.
<b>International tourism</b>	Comprises inbound tourism and outbound tourism, that is, the activities of resident visitors outside the country of reference, either as part of domestic or outbound tourism trips and the activities of non-resident visitors within the country of reference on inbound tourism trips.
<b>International tourism consumption</b>	Also referred to as internal tourism consumption by international visitors. Consists of the tourism consumption within the economy by non-residents on tourism related products.
<b>International travellers</b>	Those who undertake international travel are considered as international travellers.
<b>International visitor</b>	An international traveller qualifies as an international visitor with respect to the country of reference if: (a) he/she is on a tourism trip and (b) he/she is a non-resident travelling in the country of reference or a resident travelling outside of it.
<b>ISIC</b>	ISIC is the United Nations International Standard Industrial Classification of All Economic Activities; the third revision of ISIC is used in the 1993 SNA.

<b>Leontief inverse (input-output) table</b>	The columns of the Leontief inverse (input-output) table show the input requirements, both direct and indirect, on all other producers, generated by one unit of output
<b>Main destination</b>	The main destination of a tourism trip is defined as the place visited that is central to the decision to take the trip.
<b>Main purpose of a trip</b>	The main purpose of a trip is defined as the purpose in the absence of which the trip would not have taken place. The main purpose of a trip is one of the criteria used to determine whether the trip qualifies as a tourism trip and the traveller qualifies as a visitor. If the main purpose is to be employed and earn income (compensation for the labour input provided), then the trip cannot be a tourism trip and the individual taking the trip cannot be considered as a visitor (even though it is outside his/her usual environment and for less than 12 months), but as an "other traveller".
<b>Margin</b>	This is the difference between the resale price of a good and the cost to the retailer or wholesaler of the good sold. A transport margin consists of the transport charges invoiced separately by the producer in the delivery of a good.
<b>Margin (trade)</b>	A trade margin is the difference between the actual or imputed price realised on a good purchased for resale (either wholesale or retail) and the price that would have to be paid by the distributor to replace the good at the time it is sold or otherwise disposed of.
<b>Margin (transport)</b>	A transport margin consists of those transport charges paid separately by the purchaser in taking delivery of the goods at the required time and place.
<b>Multipliers</b>	An I-O multiplier is a quantitative measure created by a particular I-O based economic model. It is an analytical answer to a hypothetical question about how a certain expenditure is expected to impact the economy. The multipliers allow users to make estimates of the whole economy impacts of small changes in the economy.
<b>National tourism</b>	Comprises domestic tourism and outbound tourism, that is, the activities of resident visitors within and outside the country of reference, either as part of domestic or outbound tourism trips.
<b>National tourism consumption</b>	National tourism consumption is the tourism consumption of resident visitors, within and outside the economy of reference. It is the sum of domestic tourism consumption and outbound tourism consumption.
<b>Net taxes on products</b>	Also referred to as taxes less subsidies on products. A tax or subsidy on a product is payable per unit of a good or service. The tax or subsidy may be a specific amount of money per unit of quantity of a good or service (quantity being measured either in terms of discrete units or continuous physical variables such as volume, weight, strength, distance, time, etc.), or it may be calculated ad valorem as a specified percentage of the price per unit or value of the goods or services transacted. A tax or subsidy on a product usually becomes payable when the product is produced, sold or imported, but it may also become payable in other circumstances, such as when a good is exported, leased, transferred, delivered, or used for own consumption or own capital formation. See also Other taxes on production and Taxes less subsidies on production and imports.

<b>Other taxes on production</b>	Consist of all taxes that enterprises incur as a result of engaging in production, except taxes on products. Other taxes on production include: taxes related to the payroll or workforce numbers excluding compulsory social security contributions paid by employers and any taxes paid by the employees themselves out of their wages or salaries; recurrent taxes on land, buildings or other structures; some business and professional licences where no service is provided by the Government in return; taxes on the use of fixed assets or other activities; stamp duties; taxes on pollution; and taxes on international transactions. See also Taxes less subsidies on production and imports.
<b>Outbound tourism</b>	The travel of outbound visitors is called outbound tourism. It comprises the activities of a resident visitor outside the country of reference, either as part of an outbound tourism trip or as part of a domestic tourism trip.
<b>Outbound tourism consumption</b>	Outbound tourism consumption is the tourism consumption of a resident visitor outside the economy of reference. Also referred to as tourism imports. Consists of the tourism consumption by resident visitors outside of the economy while on an international trip.
<b>Outbound trip</b>	An outbound trip is one with a main destination outside the country of residence of the visitor.
<b>Outbound travel</b>	Travel outside a country by residents is called outbound travel.
<b>Output</b>	Output consists of those goods or services that are produced within an establishment that become available for use outside that establishment, plus any goods and services produced for own final use.
<b>Output multiplier</b>	Output multiplier for a particular industry is defined to be the total of all outputs from each domestic industry required in order to produce one additional unit of output: that is, the column sums ( $\Sigma_i$ ) from Leontief inverse matrix ( $L_{ij}$ ).
<b>Principal activity</b>	The principal activity of a producer is the activity whose value added exceeds that of any other activity carried out within the same unit. The output of the principal activity must consist of goods or services that are capable of being delivered to other units even though they may be used for own consumption or own capital formation.
<b>Principal usual activity status of persons</b>	The activity status of a person during the reference period of 365 days preceding the date of survey, which is determined on the basis of a person spending relatively longer time (i.e. major time criterion). Based on this a person is categorised as those (a) belonging to labour force and (b) not belonging to the labour force ('neither working nor available for work'). Within the labour force, the criteria of (i) 'working' and (ii) 'not working but seeking and/or available for work' is again based on the major time criterion. The principal status workers are from (i) whereas the subsidiary status workers can be from either or both of (i) and (ii).
<b>Principal product</b>	The principal product of an industry is the characteristic or main product produced by the relevant industry. Producing units are classified to industries according to which products they make. If they produce more than one product, they are classified according to whichever accounts for the greatest part of their GVA.
<b>Production</b>	Production is an activity, carried out under the responsibility, control and management of an institutional unit that uses inputs of labour, capital and goods and services to produce outputs of other goods and services.

<b>Production account</b>	The production account records the activity of producing goods and services as defined within the SNA; its balancing item, gross value added, is a measure of the contribution to GDP made by an individual producer, industry or sector.
<b>Products</b>	Products, also called “goods and services”, are the result of production; they are exchanged and used for various purposes: as inputs in the production of other goods and services, as final consumption or for investment.
<b>Purchaser’s price</b>	The purchaser’s price is the amount paid by the purchaser, excluding any deductible VAT or similar deductible tax, in order to take delivery of a unit of a good or service at the time and place required by the purchaser; the purchaser’s price of a good includes any transport charges paid separately by the purchaser to take delivery at the required time and place.
<b>Same day visitor</b>	A visitor (domestic, inbound or outbound) is classified as a same-day visitor (or excursionist) if his/her trip does not include an overnight stay
<b>Social transfers in kind</b>	Social transfers in kind consist of social security and social assistance benefits in kind together with goods and services provided to individual household outside any social insurance scheme by non-market producers owned by government units or non-profit institutions (NPIS).
<b>Subsidies</b>	Subsidies are current unrequited payments that government units, including non-resident government units, make to enterprises on the basis of the levels of their production activities or the quantities or values of the goods or services which they produce, sell or import. They include the financing of deficits on public trading services deliberately run at a loss. There are two types, see subsidies on production and subsidies on products.
<b>Subsidy on a product</b>	A subsidy on a product is a subsidy payable per unit of a good or service produced, either as a specific amount of money per unit of quantity of a good or service or as a specified percentage of the price per unit; it may also be calculated as the difference between a specified target price and the market price actually paid by a buyer. These are subsidies based on a quantity or value of goods or services sold.
<b>supply</b>	The supply of a good or service is the sum of the values of its domestic output (from all sectors), plus imports, c.i.f. when measured at basic prices. At purchasers’ prices, trade and transport margins and net taxes on products are also added.
<b>Supply Table</b>	The main body of the Supply Table shows estimates of domestic industries’ output by type of product at basic prices. The columns represent the supplying industries and the rows represent the products supplied. Additional columns covering imports of goods and services, distributors’ trading margins and taxes (less subsidies) on products are added to show supply of all goods and services at purchasers’ prices.
<b>Supply and use tables</b>	Supply and use tables are in the form of matrices that record how supplies of different kinds of goods and services originate from domestic industries and imports and how those supplies are allocated between various intermediate or final uses, including exports.
<b>Tax on a product</b>	A tax on a product is a tax that is payable per unit of some good or service, either as a specified amount of money per unit of quantity or as a specified percentage of the price per unit or value of the good or service transacted.

<b>Taxes</b>	Taxes are compulsory, unrequited payments, in cash or in kind, made by institutional units to government units; they are described as unrequited because the government provides nothing in return to the individual unit making the payment, although governments may use the funds raised in taxes to provide goods or services to other units, either individually or collectively, or to the community as a whole.
<b>Taxes on production and imports</b>	Taxes on production and imports consist of taxes payable on goods and services when they are produced, delivered, sold, transferred or otherwise disposed of by their producers plus taxes and duties on imports that become payable when goods enter the economic territory by crossing the frontier or when services are delivered to resident units by non-resident units; they also include other taxes on production, which consist mainly of taxes on the ownership or use of land, buildings or other assets used in production or on the labour employed, or compensation of employees paid.
<b>Taxes on products</b>	Taxes on products, excluding VAT, import and export taxes, consist of taxes on goods and services that become payable as a result of the production, sale, transfer, leasing or delivery of those goods or services, or as a result of their use for own consumption or own capital formation. These taxes are defined as product specific taxes, for example: value added tax, excise duties, air passenger tax, insurance premium tax and import duties, and are based on the volume or value of production sold.
<b>Total economy</b>	The total economy consists of all the institutional units which are resident in the economic territory of a country.
<b>Total final expenditure</b>	This is the sum total of final consumption, gross capital formation and exports of goods and services. Total final expenditure is the same as total demand by final buyers and is equal to total final output.
<b>Total intermediate consumption</b>	The total intermediate consumption of each industry is the industry's total purchases of the outputs of other industries as well as purchases of imports of goods and services and intra-industry purchases for use in its production process. This is adjusted for the change in inventories of materials and fuels and excludes primary inputs.
<b>Total tourism internal demand</b>	Total tourism internal demand, is the sum of internal tourism consumption, tourism gross fixed capital formation and tourism collective consumption. It does not include outbound tourism consumption.
<b>Total output</b>	The total output of an industry is the aggregate value of the goods and services together with the work-in-progress produced by the industry. It is equal to the value of the industry's sales plus any increase (and less any decrease) in the value of its inventories of finished products and work-in progress. Output is thus measured after deducting holding gains. The outputs of the distribution and service trades industries are measured on a 'gross margin' basis.
<b>Taxes less subsidies on production and imports</b>	Defined as 'taxes on products' plus 'other taxes on production' less 'subsidies on products' less 'other subsidies on production'. The taxes do not include any taxes on the profits or other income received by an enterprise. They are payable irrespective of the profitability of the production process. They may be payable on the land, fixed assets or labour employed in the production process, or on certain activities or transactions.
<b>Tourism</b>	Comprises the activities of visitors.

<b>Tourism characteristic industries</b>	Are those industries that would either cease to exist in their present form, producing their present product(s), or would be significantly affected if tourism were to cease. Under the international TSA standards, core lists of tourism characteristic industries, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate international comparison. Some countries use the criteria of at least 25 per cent of an industry's output must be consumed by visitors to be a country-specific tourism characteristic industry.
<b>Tourism characteristic products</b>	These are defined in the international TSA standards as those products which would cease to exist in meaningful quantity, or for which sales would be significantly reduced, in the absence of tourism. Under the international TSA standards, core lists of tourism characteristic products, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate international comparison. It is also recommended in the international TSA standards that country-specific tourism characteristic products are identified.
<b>Tourism connected industries</b>	Are those, other than tourism characteristic industries, for which a tourism related product is directly identifiable (primary) to, and where the products are consumed by visitors in volumes which are significant for the visitor and/or the producer. All other industries are classified as non-tourism industries, though some of their products may be consumed by visitors and are included in the calculation of direct tourism gross value added and direct tourism GDP.
<b>Tourism connected products</b>	Are those that are consumed by visitors but are not considered as tourism characteristic products. All other products in the supply and use table not consumed by visitors are classified as 'all other goods and services' in the TSA.
<b>Tourism consumption</b>	Tourism consumption has the same formal definition as tourism expenditure. Nevertheless, the concept of tourism consumption used in the TSA goes beyond that of tourism expenditure. Actually, besides "the amount paid for the acquisition of consumption goods and services, as well as valuables for own use or to give away, for and during tourism trips" that corresponds to monetary transactions (the focus of tourism expenditure), it also includes services associated with vacation accommodation on own account, tourism social transfers in kind, and other imputed consumption. These transactions need to be estimated using sources different from information collected directly from the visitors such as reports on home exchanges, estimations of rents associated to vacation homes, calculations of FISIM, etc.
<b>Tourism demand</b>	Expenditure made by, or on behalf of, the visitor before, during and after the trip and which expenditure is related to that trip and which trip is undertaken outside the usual environment of the visitor.
<b>Tourism direct gross domestic product (TDGDP)</b>	Tourism direct gross domestic product is the sum of the part of gross value added (at basic prices) generated by all industries in response to internal tourism consumption plus the amount of net taxes on products and imports included within the value of this expenditure at purchasers' prices.
<b>Tourism direct gross value added (TDGVA)</b>	Tourism direct gross value added is the part of gross value added generated by tourism industries and other industries of the economy that serve directly visitors in response to internal tourism consumption.
<b>Tourism</b>	The amount paid for the acquisition of consumption goods and services as well as valuables,

<b>expenditure</b>	for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves as well as expenses that are paid for or reimbursed by others.
<b>Tourism exports</b>	Tourism exports are domestically produced goods and services consumed by international visitors to the country.
<b>Tourism industry ratio</b>	This is the proportion of the total value added of an industry which is related to tourism.
<b>Total tourism internal demand</b>	Computed by adding tourism internal consumption (domestic and inbound tourism consumption) with other components of internal demand, such as tourism collective consumption and tourism gross fixed capital formation.
<b>Tourism imports</b>	Tourism imports are consumption of overseas produced goods and services by residents on overseas trips.
<b>Tourism net taxes on products</b>	Consists of taxes paid less subsidies received on tourism related products which is attributable to productive activity of tourism related industries that are in a direct relationship with visitors. In the case of goods purchased by visitors, only the net taxes attributable to the value of retail trade services on those goods will be included.
<b>Tourism product ratio</b>	This is the proportion of the total supply of a product which is consumed by visitors.
<b>Tourism ratio</b>	For each variable of supply in the TSA, the tourism ratio is the ratio between the total value of tourism share and total value of the corresponding variable in the TSA expressed in percentage form.
<b>Tourism share</b>	Tourism share is the share of the corresponding fraction of internal tourism consumption to each component of supply. For each industry, the tourism share of output (in value), is the sum of the tourism share corresponding to each product component of its output.
<b>Tourism single purpose consumer durable goods</b>	Tourism single-purpose consumer durables are a specific category of consumer durable goods that include durable goods that are used exclusively, or almost exclusively by individuals while on tourism trips.
<b>Tourism Satellite Account</b>	Tourism Satellite Account consists in analyzing in detail all the aspects of demand for goods and services which might be associated with tourism, in establishing the actual interface with the supply of such goods and services within the economy of reference, or outside and in describing how this supply (from domestic or imported origin) interacts with other economic activities, using the SUT as a reference.
<b>Tourist</b>	A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor) if his/her trip includes an overnight stay.
<b>Tourism trip</b>	Trips which are undertaken by visitors.
<b>Tourism visit</b>	The term tourism visit refers to a stay in a place visited during a tourism trip. However, while discussing the different forms of tourism (domestic, inbound and outbound), the term visitor is often used instead of tourism visit or tourism trip.
<b>Travel</b>	Travel refers to the activity of travellers.
<b>Transportation</b>	Transportation (BoP item 205) covers services provided by all modes of transportation - sea,

<b>in balance of payments statistics</b>	air, and other, which includes space, rail, road, inland waterway and pipeline - that are performed by residents of one economy for those of another. The different types of services offered include transport of passengers, transport of freight and other supporting and auxiliary services (e.g., storage and warehousing).
<b>Travel in balance of payments statistics</b>	The item Travel (BoP item 236) consists of goods and services which are acquired by residents who stay abroad or foreign travellers on the national territory for less than one year. Note that international transportation costs of the traveller to destination are recorded under the heading "transportation", but all movements within the country, including cruises, are entered under "travel".
<b>Traveller</b>	A traveller is someone who moves between different geographic locations for any purpose and any duration. Travel within a country by residents is called domestic travel. Travel to a country by non-residents is called inbound travel, whereas travel outside a country by residents is called outbound travel. Those who undertake travel, be it domestic, inbound or outbound, will be called domestic, inbound or outbound travellers, respectively.
<b>Trip</b>	A trip refers to the travel by a person from the time of departure from his usual residence until he/she returns to the same place: it thus refers to a round trip. A trip is made up of visits to different places. An inbound trip will correspond to the travel between arriving in a country and leaving, whereas a domestic trip or an outbound trip will correspond to the travel between leaving the place of residence and returning. A domestic trip has a main destination in the country of residence of the traveller, while an outbound trip has a main destination outside this country.
<b>TSA aggregates</b>	The compilation of the following aggregates, which represent a set of relevant indicators of the size of tourism in an economy is recommended: <ul style="list-style-type: none"> <li>• Internal tourism expenditure;</li> <li>• Internal tourism consumption;</li> <li>• Gross value added of the tourism industries (GVATI);</li> <li>• Tourism direct gross value added (TDGVA);</li> <li>• Tourism direct gross domestic product (TDGDP)</li> </ul>
<b>Uses</b>	The term refers to transactions in the current accounts that reduce the amount of economic value of a unit or sector, for example, wages and salaries are a type of use for the unit or sector that must pay them. By convention, uses are on the left-hand side of SNA accounts.
<b>Usual environment</b>	The geographical area (though not necessarily a contiguous one) within which an individual conducts his/her regular life routines. This is made up of one or more areas in which a person undertakes their regular activities such as their residence, place of work, place of study and other places frequently visited. The usual environment criteria has two dimensions – frequency (places that are visited on a routine basis) and distance (locations close from home for overnight trips).
<b>Usual expenditures</b>	In addition to the usual expenditures made by visitors while travelling (or preparing to travel) on commodities such as transport, meals or accommodation, these expenditures cover, inter alia, expenses incurred for the purposes of travel, such as suitcases which may be purchased some time before the planned trip. On the other hand, the measure excludes expenditure on capital equipment or other capital acquisition that may be made by a businessman while on a trip (even if that were the reason for the trip). If the trip were paid for by a non-visitor (such

	as parents paying for their child to visit them from abroad), it would be included because the expenditure was made on behalf of the visitor.
<b>Valuables</b>	Valuables are produced assets that are not used primarily for production or consumption, that are expected to appreciate or at least not to decline in real value, that do not deteriorate over time under normal conditions and that are acquired and held primarily as stores of value.
<b>Visitor</b>	A visitor is a traveller taking a trip to a main destination outside his/her usual environment for less than a year and for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited

## APPENDIX



## APPENDIX

*Estimation  
Procedure*

A.1. The unit-level data (micro-data) of the survey provides the estimated number of trips for both “last 30 days” and “last 365 days”. However, estimated number of trips by different categories such as main destination of trip, purpose and types of trip, mode of travel, etc. is available only for “last 30 days” and not for “last 365 days”. Therefore, to arrive at the estimates for “last 365 days”, it is assumed that the joint distribution for the last 365 days for households/trips/visitor-trips is the same as the joint distribution obtained for the last 30 days.

A.2. Accordingly, the distribution of trips by purpose of travel for “last 30 days” is applied on the marginal total estimated number of trips for “last 365 days” to arrive at the estimated number of trips by purpose of travel for the “last 365 days”. Also obtained is the estimated number of trips originating from each state when their main destination is the state of reference.

A.3. Further, the survey data provides information on item-wise expenditure incurred during the latest 3 overnight trips only that were undertaken during the “last 30 days”. This information is neither available for all the trips undertaken during “last 30 days” nor for trips undertaken during “last 365 days”.

A.4. Therefore, it is assumed that the average expenditure per trip based on last 3 overnight trips during the last 30 days for any group of trips or visitor/trips remains invariant for the last 30 days. Also, average expenditure for last 30 days for any group of trips or a particular category of expenditure is assumed to be the same for the last 365 days.

A.5. Under these assumptions, average expenditure per overnight trip for a group or category of trip is obtained as the ratio of total estimated expenditure incurred on the group or category of overnight trips to the estimated number of overnight trips on the basis of the latest three trips during the last 30 days for which the expenditure has been reported.

A.6. This ratio multiplied with the estimated total number of overnight trips during the “last 365 days” gives the total estimated expenditure for all the trips taken during “last 365 days”. It should be noted that these estimates are obtained at state-level such that the expenditures refer to those trips which originate from any state of India (other than the state of reference) and whose main destination is the state of reference.

A.7. The DTS also recorded item-wise expenditure incurred by non-package tourists and a lump sum expenditure incurred by package tourists. In such cases, the package cost is distributed across the items of expenditure in the same structure as observed in the expenditure pattern of non-package tourists.

A.8. Hence total item-wise expenditure incurred by package as well as non-package tourists is arrived at.

A.9. Since the reference period of DTS is 2008-09 whereas TSA is prepared for 2009-10, the expenditure data obtained from DTS are inflated for 2009-10 using the PFCE deflator.



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