

# Indian Perceptions of Five Long-Haul Pleasure Trip Destinations: Imagery Ratings of Destination Motivators and Interests in Visiting

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## Abstract

According to the World Tourism Organization, India will be one of the leading outbound tourism markets by 2050 with 50 million travellers. This study analyzes Indian views of five selected long-haul pleasure trip destinations using the secondary data from the 2007 India Consumer & Travel Trade Research commissioned by the Canadian Tourism Commission. Results indicate that potential Indian travellers considered “being in a clean, healthy environment”, “good value air fares” and “beautiful unspoiled nature” as the most important imagery ratings of destination motivators when considering taking a long-haul trip outside of India for four nights or longer. Further, findings indicate that there are significant differences in potential Indian travellers' perceptions of the five long-haul holiday destinations regarding the best imagery ratings of destination motivators, interest in visiting each of the destinations in the next two years, and likelihood of visiting each of them in the next 12 months. This study demonstrates the competitiveness of the five destinations and suggests destination or product differentiation strategies to increase consumer awareness and attract more Indian travellers.

**Keywords** Indian outbound tourism, Long-haul pleasure destinations, Imagery ratings of destination motivators, Interest in and likelihood of visiting

## Introduction

There can be no doubt that the balance of economic power is shifting from North America and Europe to Asia, and while Mainland China has been a major player in this shift, India is catching up fast. Since the advent of policy changes in 1991 that liberalized the trade regime, India's economic performance improved dramatically. Its high growth rate, particularly in the last decade, has given rise to an emergent middle class that is expected to exceed 500 million by 2025 and 1 billion by 2039 (Kharas 2010). This dramatic expansion of the middle class is driven by a number of factors, including its continued population and labour participation growth, a significant influx of Foreign Direct Investment, the urbanization of the population with 10 of the world's fastest growing 30 urban areas (Poddar and Yi 2007), increasing education levels, and a rapid reduction in poverty (Kharas 2010).

Members of the middle class are able to choose what they wish to consume, and among these discretionary choices that are starting to dominate consumption patterns is travel. Domestic travel has surged over 20 years to reach more than 740 million trips in 2010. The freeing up of the basic travel quota in 1996 has also resulted in the rapid growth in outbound travel, from 2.3 million in 2000 to just under 14.21 million departures in 2011 (Ministry of Tourism Government of India 2012; World Bank 2012). While outbound travel incidence is still minute in light of India's population of 1.3 billion, its growth potential is considerable. The World Tourism Organization estimates that by 2020, approximately 50

million Indians will travel internationally for their holidays, making the country one of the leading outbound markets (UNWTO 2009). However, to date relatively little work has been done to study this outbound market, and especially the long-haul market, in spite of the fact that the UNWTO (2006: ix) noted that “outbound tourism has grown far more than inbound during this period [2004-2010] and still has huge unexplored potential”. However, as with so many emerging countries, the non-availability of reliable data is a major weakness in respect in obtaining a comprehensive understanding of Indian outbound travellers. Indeed, information provided by the Indian Ministry of Tourism is compiled from the UNWTO statistics of inbound tourism to various destinations (UNWTO 2006).

This study analyzes Indian views of five long-haul destinations, including Southeast Asia, Europe, Australia, the United States, and Canada. The main purpose of this study is to explore the competitiveness of long-haul pleasure destinations where potential Indian travellers consider making a pleasure trip in the future and the positioning of these destinations. The study pursues four objectives: 1) identify the salient attributes of imagery ratings of destination motivators that influence potential Indian travellers to select a long-haul pleasure trip destination; 2) examine which imagery ratings of destination motivators are the best for each of the selected destinations as perceived by potential Indian travellers; 3) explore relationships between the five selected long-haul pleasure trip destinations and potential Indian travellers' perceptions of their ratings of imagery attributes of destination motivators; and 4) investigate levels of interest in visiting the destinations in the next two years and the likelihood of visiting them in the next 12 months. The third research objective was graphically analyzed using correspondence analysis, which produced a perceptual map indicating the locations of selected long-haul destinations and potential Indian travellers' perceptions of their attributes.

## Literature Review

According to Beinhocker et al (2007), India's middle class is set to grow from 5% of the population to more than 40%, or almost 600 million, within 20 years. During this time, household incomes are expected to triple, making India the world's fifth largest consumer economy by 2025, and possibly number three by 2050 (Dadush and Stancil 2010). Ablett et al (2007) found that household income growth will be particularly strong in urban areas, with middle-tier cities catching up, and in some cases surpassing, top tier cities for consumer spending. Already, about 40% of the population has shifted to urban areas (PATA and Visa International 2007). In parallel to this unprecedented growth in consumption, there will be a shift from spending on basic necessities to spending on discretionary items, including leisure travel and recreation (UNWTO 2006). Since travel demand tends to have an income elasticity that is greater than one, i.e., travel growth tends to be faster than GDP growth (Adam Sachs as cited in Oxford Economics and Amadeus 2010), it is predicted that travel, both domestic and international, will see “explosive growth in the coming years among the growing middle class” (Ablett et al. 2007: 125). Indeed, estimates of personal consumption have been projected to represent an average of 5.75% of total spending in 2011 (WTTC 2001), and a 4.5% annum increase in the total amount of travel and tourism (WTTC 2011).

Between 2000 and 2008, India's outbound travel increased 146% to reach 10.9 million people (UNWTO, 2010). Various sources put business travel between 30 and 40% (UNWTO 2006; PATA and Visa International 2007), while 20% are for leisure and the same for visiting friends and relatives and other purposes (PATA and Visa International 2007).

Travel for education, religion, short-term employment and honeymoons are also quite important segments (UNWTO 2006). Shopping is cited as an important activity, if not main purpose of trip by a large number of outbound travellers (UNWTO 2006). Short-haul destinations in Southeast Asia – Singapore, Thailand and Malaysia – are the most popular with Indian leisure travellers, but it is estimated that over 40% of the outbound market is to long-haul destinations (Canadian Tourism Commission 2010), with the Middle East capturing an important share. A significant amount of travel also occurs to Europe, including the UK, and the USA. The latter two countries are home to a very large number of Indian diaspora and hence receive a large share of visiting friends and relatives (VFR) market. Travel to more distant and different locations is growing, but is still very small in absolute and relative terms. About 60% of outbound travel originates in just two cities: Mumbai with 33% and Delhi with 26% (PATA and Visa International 2007).

Outbound tourism has been described as heavily male dominated with about 60% of the travellers belonging to the age group of 25-45 years and originating from the urban centers in the North-West (UNWTO 2006). Ease of access is an issue in countries with an underdeveloped infrastructure and India is no exception, especially since departures by air account for about 98% of all departures (UNWTO and European Travel Commission 2009). Euromonitor (2012) predicts that low cost carriers such as IndiGo and SpiceJet, which have launched international flights at value fares, will increase the competition for international travel. These cheaper outbound flights will further drive Indian tourists to make international trips. Similarly, where a population is just starting to enter the market, awareness of destinations through the media, marketing and promotion plays an important role in destination choice. Visas can represent a major barrier as do the cost of reaching the destination and purchasing parity power once there (UNWTO 2006; UNWTO and European Travel Commission 2009). Thus, it is not surprising that these factors are among the top five that influence destination selection along with safety and security, the variety of things to see and do and good tourist facilities and infrastructure.

Most leisure trips are planned and package tours play an important role, accounting for lower than expected or realistic expenditure in the destination country (UNWTO 2006). Two-thirds of leisure travellers tend to holiday abroad with family (UNWTO and European Travel Commission 2009). According to research by Kuoni (2009: 4), Indians are “amongst the high spenders on shopping, prefer luxurious stay and visit more attractions than other nationalities”. Furthermore, more experienced Indian travellers are willing to experiment with niche products such as golf, wine and wellness tourism, while niche products such as adventure sports, luxury holidays, spa and wellness retreats, and wildlife vacations, amongst others, are emerging.

Euromonitor (2011) predicts that the US will be the most preferred destination for Indian travellers in the near future and received about 10% of outbound tourists in 2011, up from 8.8% in 2010 (UNWTO 2011). However, Europe received about 20% of all outbound travellers with five countries – United Kingdom, France, Italy, Germany and Switzerland – accounting for a majority of the share of travel to Europe (WTTC 2011). The key travel motivations of Indian visitors to Europe are culture/sightseeing holiday, touring/driving holiday, snow/ski holiday and holiday in the mountains, with a majority of visitors opting for a multi-country vacation. Other strong outbound markets are Australia and Canada, with 148,200 in 2011 (Tourism Australia 2012) and 149,900 in 2010 (Canadian Tourism

Commission 2011), respectively.

It has been well established in the tourism literature that the decision to travel arises from perception, that is to say “the process by which an individual receives, selects, organizes, and interprets information to create a meaningful picture of the world” (Kotler et al 1996: 196; Sheth et al 1999: 298). With regard to the tourism product, perception is the process of sorting and filtering the vast array of information about a particular destination (Sussmann and Ünel, 1999). The factors that are known to influence destination perceptions can be divided into three categories: travel stimuli (marketing communication, travel literature, word of mouth, and travel trade suggestions and recommendations), personal and social determinants of travel behaviour (socioeconomic status, personality features, social influences, and attitudes and values), and external variables (confidence, image of destination, past travel experience, assessment of objective/subjective risks, and constraints of time, cost, etc.) (Decrop 2006; Mathieson and Wall 1982; Mayo and Jarvis 1981; Middleton 1988; Moutinho 1987; Reisinger and Mavondo 2005; Reisinger and Turner 2002; Schmoll 1977; Sussmann and Ünel 1999; Um and Crompton 1990; Woodside and Lysonski 1989; Woodside and MacDonald 1994).

However, it has also been shown that travellers can develop perceptions of a destination prior to visiting it (Moutinho 1987). Not only can people have different perceptions of the same object, but they can also have different interpretations of the object in question. This poses a potential problem for marketers. For example, the same advertising message may be interpreted differently by different audiences or even individual members of the same audience. Marketers require an understanding of the concept of perceptual bias; that is, the distortion of information that results from the way in which it is perceived by the receiver (Decrop 1999; Engel et al. 1993; Mayo and Jarvis 1981). Sussmann and Ünel (1999) have demonstrated that no amount of positive coverage will render a destination attractive to a market segment looking for a completely different set of attributes. Although a distinction exists between what specific attributes are provided (a real world of objective events) and what or how potential travellers may perceive them (a subjective world of events), for the customer, perception may be more than reality. Thus, Um and Crompton (1990: 433) suggested that these perceptions are “likely to be critical elements in the destination choice process, irrespective of whether or not they are true representations of what the destination has to offer.”

Much research has dealt with the perception of destinations over the past several decades and how tourists evaluate and choose them. These three aspects are in line with the classical distinction between cognitive, affective, and conative consumer responses in decision-making models (Decrop 2006). The mixture of positive and negative perceptions of different aspects of a destination result in the destination's image held by individual tourists and represents their reality.

Topics in tourism destination perception research include, among others, its role in determining travellers' decision-making processes or purchasing behaviours, evaluation of (satisfaction with) destination attributes, destination positioning, and relationships between destination perceptions and behavioural intentions. Perhaps the most extensive work has been conducted on the attribute perspective, that is to say the characteristics or features of the destinations that are used to form judgments and decisions (Chen and Hsu 2000; Chon 1990;

Crompton 1979; Driscoll et al. 1994; Echtner and Ritchie 1993; Fakeye and Crompton 1991; Gartner 1996; Goodrich 1977, 1978; Hu and Ritchie 1993; Joppe et al. 2001; Kim 1998; Lee et al. 2008; MacKay and Fesenmaier 1997; Pearce 1982; Pike and Ryan 2004; Um and Crompton 1990; Vogt and Andereck 2003).

In this study, imagery ratings of destination motivators including activities/experiences and destination attributes were included in examining Indian perceptions of the five holiday destinations rather than general attributes of a destination such as climate, ecology, natural resources, and so on. Although a destination itself is a travel product, specific destination motivator items used in this study represent perceived travel products.

## **Methodology**

### ***Data Source and Sample***

The data used in this study was the India Consumer and Travel Trade Research collected by Insignia Marketing Research (Canadian Tourism Commission, 2007). A total of 2,636 face-to-face interviews were conducted from January 25 to March 1, 2007, using convenience sampling. All respondents were Indian males aged 18 and older as males are the primary destination decision makers in Indian culture. Respondents were selected from the top 10 largest centres (Mumbai, Delhi, Kolkata, Bangalore, Chennai, Ahmedabad, Hyderabad, Pune, Ludhiana, and Chandigarh) and in Socio-Economic Classes (SEC) A and B. The Indian Readership Survey (IRS 1998-1999) groups urban Indian households based on education and occupation of the chief wage earner into five segments from SEC A to SEC E. 'High' socioeconomic classes refer to SEC A and B, while SEC C is considered 'mid' and SEC D and E are considered 'low' socioeconomic classes. The vast majority of outbound travellers are in SEC A and B. Thus, the survey was restricted to these two segments.

In addition, respondents had to have travelled outside of India for four nights or more for pleasure, personal reasons, or combined business and pleasure in the past three years, or planned to take a pleasure trip outside of India for four nights or longer in the next two years. For this study, a sub-sample of 1,326 *potential Indian travellers* (50.3 percent of 2,636 total respondents) who had not taken any long-haul pleasure trip in the past three years but had planned to definitely (921; 69.5%) or very likely (405; 30.5%) take a trip in the next two years was selected and analyzed.

### ***Study Variables***

The questionnaire collected a wide range of information including socio-demographic characteristics (e.g., socio-economic classification, city of residence, age, marital status, education, occupation, and gross annual household income), past travel experiences (e.g., number of pleasure holiday trips taken outside of India for four nights or more in the past three years, destinations most recently visited, main reason for the trip, etc.), preferred future travel destination and intentions (e.g., preferred future travel destinations for long-haul pleasure holiday trips, interest in visiting the destinations in the next two years, likelihood of visiting the destinations in the next twelve months), and importance of imagery ratings of destination motivators.

The primary variables used for this study were attributes of imagery ratings of destination motivators, interest in visiting five selected long-haul travel destinations

(Southeast Asia, Europe, the United States, Australia, and Canada) in the next two years, and likelihood of visiting them in the next twelve months. Imagery ratings of destination motivator items consisted of 33 items measuring level of importance of each item when considering a pleasure trip outside of India for four nights or longer. Responses to the items were measured on a 4-point Likert-type scale where 1=very important, 2=somewhat important, 3=not very important, and 4=not at all important. Combined with these 33 items, the respondents were also asked to select the given imagery ratings of destination motivators that apply 'extremely well' to each of the five destinations. Categorical data of these selected multiple responses were rescaled as ratios for each destination. Interest in visiting the destinations was measured on a 4-point Likert-type scale (1=not at all interested, 2=not very interested, 3=somewhat interested, 4=very interested) for all respondents and likelihood of visiting the destination was measured on a 6-point Likert-type scale (1=definitely will not visit, 2=not at all likely; 3=not very likely; 4=somewhat likely; 5=very likely; 6=definitely will visit) for only those who were 'very' or 'somewhat' interested in visiting the destinations.

### ***Data Analysis***

First, descriptive data analyses were performed for all items of socio-demographic variables, imagery ratings of destination motivators, choices of best imagery ratings of destination motivators for the five selected long-haul destinations, interest in visiting the destinations in the next two years, and likelihood of visiting the destination in the next twelve months to provide characteristics of the sample and offer general information regarding the variables.

Information of choices of best fit imagery ratings of destination motivators for the five selected long-haul pleasure trip destinations perceived by Indian potential travellers was collected by using a multiple-response question, meaning that these are not a single categorical variable. Based on the characteristics of imagery ratings of destination motivators for each of the destinations, the result could be analyzed using multiple correspondence analysis rather than simple correspondence analysis. However, for this study, the imagery ratings of destination motivator items were transformed into a single multiple-option categorical variable. When multiplied by the number of imagery destination motivators that each respondent chose (out of a possible 33), a new data set of 78,872 samples were created and used for single correspondence analysis (CA) and positioning maps; total possible number of samples is 218,790 (33 imagery ratings of destination motivators  $\times$  1,326 samples  $\times$  5 destinations).

CA is a multidimensional scaling technique for qualitative data to scale the rows and columns of the input contingency table in corresponding units so each can be displayed in a two-dimensional plot (Hair et al. 1998). An alternative to CA is positioning by using attribute-free perceptual mapping with a compositional method (Hoffman & Franke 1986). In this attribute-based method, the perceptual map is a joint space, showing both the attributes of the five selected destinations and imagery ratings of destination motivator variables in a single representation (Hair et al. 1998).

Finally, one-way analysis of variance (ANOVA) tests were run on choices of best destination motivators of imagery ratings, interest in visiting the destinations, and likelihood of visiting the destinations to determine whether variables differed among the five long-haul pleasure trip destinations. Furthermore, when significant differences were found, Duncan's

post-hoc multiple comparison tests (SAS Institute Inc. 1990) were used to examine the source of differences across the long-haul destinations.

## Results

### *Socio-Demographic Profile of the Respondents*

Table 1 summarizes the socio-demographic profile of the sample. Three-quarters (76.2%) of respondents fell into SEC A and the remainder into SEC B. This socio-economic classification system uses the education level of the chief wage earner of a household and the number of “consumer durables” owned by the family (Market Research Council of India 2011) to divide the population with SEC A (composed of A1 to A3 sub-groups) accounting for the top 5.4% of the population. Together with SEC B (comprising two sub-groups), the respondents came from the top 14.5% of the Indian population. Since these two SEC categories are largely found in urban centres which are also the primary origin of outbound tourists, this explains why the sample was drawn from the 10 largest cities in India.

The age groups skewed younger with 55.5% between the ages of 18 and 34, perhaps as a result of the rapid evolution in terms of education and income of the population. This would appear to be borne out by the fact that 80.6% of respondents had a graduate or post-graduate degree and 74.2% hold senior positions or are business owners/professionals of some kind. Almost 60% (58.1%) were married or living with someone. A significant majority of respondents (72.7%) were concentrated in one gross annual household income category: 240,000 - 480,000 Rupees (approximately C\$6,000 - \$12,600 or US\$5,300 - \$10,700 at the time of the survey).

**Table 1. A Socio-demographic Profile of the Respondents (Total N=1,326)**

	N	%
<b>Socio-Economic Classification (SEC)</b>		
SEC A	1,010	76.2
SEC B	316	23.8
<b>City of Residence</b>		
Mumbai	255	19.2
Delhi	228	17.2
Kolkata	103	7.8
Bangalore	121	9.1
Chennai	120	9.0
Ahmedabad	101	7.6
Hyderabad	120	9.0
Pune	101	7.6
Ludhiana	86	6.5
Chandigarh	91	6.9
<b>Age</b>		
18 - 24	282	21.3
25 - 34	454	34.2
35 - 44	156	11.8
45 - 54	242	18.3
55 - 64	133	10.0
65 and over	59	4.4

<b>Marital Status</b>		
Married or living with someone	770	58.1
Single	545	41.1
Divorced/Separated/ Widowed	5	0.4
Prefer not to answer	6	0.5
<b>Education</b>		
School: 5-9 years	8	0.6
School: SSC-HSC	140	10.6
Some college (including Diploma) but not graduate	109	8.2
Graduate/Post Graduate - General	741	55.9
Graduate/Post Graduate - Professional	328	24.7
<b>Occupation</b>		
Businessmen/industrialists	385	29.0
Shop owners	172	13.0
Self employed Professional	128	9.7
Officers/executives	298	22.5
Supervisor/clerical/salesman	111	8.4
Other occupations	16	1.2
Unemployed	13	1.0
Retired	48	3.6
Student	155	11.7
<b>Gross Annual Household Income (2006)</b>		
Under 240,000 Rupees	33	2.5
240,001 to 480,000 Rupees	964	72.7
480,001 to 720,000 Rupees	225	17.0
720,001 to 960,000 Rupees	44	3.3
960,001 to 1,200,000 Rupees	13	1.0
1,200,001 and above	21	1.6
Prefer not to answer	26	2.0

### ***Importance of Imagery Ratings of Destination Motivators***

Respondents were asked to indicate the level of importance attributed to each of the imagery ratings of destination motivators when considering a pleasure trip outside of India for four nights or longer. Mean values in parentheses are presented beside each attribute of destination motivators in Table 2. Reviewing each of the imagery attributes of destination motivators, it is clear that “being in a clean, healthy environment ( $M=3.81$ )” was the highest rated destination motivator. The next highest were good value air fares ( $M = 3.53$ ); surrounded by beautiful, unspoiled nature ( $M=3.50$ ); seeing world famous sites ( $M=3.49$ ); feeling secure and safe ( $M=3.48$ ); lots to see and do ( $M=3.46$ ); easy to get a visa ( $M=3.46$ ); great flight accessibility ( $M=3.44$ ); good quality of life ( $M=3.44$ ); cost accessible for middle class people ( $M=3.41$ ); and feel free to travel around on your own ( $M=3.40$ ). At the opposite end, potential Indian travellers rated “part of old British culture ( $M=2.87$ )”, “participating in active outdoor sports ( $M=2.91$ )”, and “made Bollywood movies there ( $M=2.94$ )” as the least important attributes.

### ***Differences in Perceived Best Imagery Attributes between the Five Long-Haul Destinations***

The differences in the perceived best imagery ratings of destination motivators for the five long-haul destinations were identified using one-way ANOVA tests and are also presented in Table 2. Numbers for each item indicate percentages (%) based on the selections for attributes of destination motivators that apply 'extremely well' to each of the destinations. The ANOVA tests found that all of the ratings demonstrated significant differences between



each long-haul destination. Therefore, Duncan's post-hoc multiple comparison tests were performed to examine the source of the differences across the five destinations.

In terms of the differences in the 33 individual items of destination motivators among the five long-haul destinations (based on post-hoc multiple range comparison test results rather than top-rated imagery rating scores for each destination: see note in Table 2), Southeast Asia was more likely to be perceived as the strongest destination for specific images of destination motivators such as easy to get a visa (37.8%); cost accessible for middle class people (37.0%); visiting/ seeing local native people (35.2%); and good value air fares (35.1%), compared to other competitive destinations. However, they perceived Southeast Asia as the least preferable destination regarding participating in active outdoor sports (24.4%); part of old British culture (25.9%); seeing first hand what I learned in school (26.3%); and have friends or relatives there (26.4%).

Europe appeared to be the most favorable destination for all of the imagery ratings of destination motivators (all items were relatively highly perceived ranging from 34.2% to 48.3%), except for three items: "seeing wildlife in nature", "job opportunities", and "good business opportunities". Among all imagery ratings of destination motivators, "have friends or relatives there (34.2%)", "cost accessible for middle class people (34.2%)", "seeing wildlife in nature (34.7%)", and "easy to get a visa (36.3%)" were rated relatively low for Europe.

Australia was perceived as the most positive destination for specific imagery ratings of destination motivators such as visiting a place my friends would love to see (48.9%); surrounded by beautiful, unspoiled nature (46.7%); feeling secure and safe (44.6%); good nightlife/clubbing/pubbing (43.4%); good quality of life (43.1%); feeling a wide, spacious outdoor environment (42.4%); seeing wildlife in nature (41.1%); and lots to see and do (41.0%).

The United States was perceived by potential Indian travellers as the most appropriate destination for specific imagery ratings of destination motivators including being in a clean, healthy environment (52.9%); good business opportunities (44.9%); visiting the same places Indian celebrities go to (43.7%); great flight accessibility (43.5%); good educational opportunities (43.1%); and experiencing a modern society (40.5%). However, they perceived the United States as the least appropriate destination with regard to cost accessible for middle class people (28.0%); participating in active outdoor sports (29.0%); and seeing wildlife in nature (29.7%).

Surprisingly, no individual imagery item of destination motivators was ranked highest for Canada, although in general, Canada was perceived as having some strength as a destination for feeling secure and safe (36.3%); being in a clean, healthy environment (35.9%); visiting the same places Indian celebrities go to (35.9%); and surrounded by beautiful, unspoiled nature (35.1%). In contrast, cost accessible for middle class people (26.1%), easy to get a visa (26.7%), participating in active outdoor sports (26.9%), part of old British culture (27.1%); visiting/seeing local native people (27.6%) were all perceived as least preferable for Canada.

**Table 2. Results of One-Way ANOVA on Imagery Ratings of Destination Motivators for the Five Long-Haul Pleasure Trip Destinations**

Attributes of Destination Motivator	S.E.-A	Europe	Australia	U.S.	Canada	Total	F-Value*
Being in a clean, healthy environment ( $M=3.81$ )	35.8 <sup>b</sup>	48.3 <sup>a</sup>	50.9 <sup>a</sup>	52.9 <sup>a</sup>	35.9 <sup>b</sup>	44.8	37.8
Good value air fares ( $M=3.53$ )	35.1 <sup>a</sup>	40.0 <sup>a</sup>	38.2 <sup>a</sup>	37.4 <sup>a</sup>	28.9 <sup>b</sup>	35.9	10.7
Surrounded by beautiful, unspoiled nature ( $M=3.50$ )	34.5 <sup>b</sup>	45.2 <sup>a</sup>	46.7 <sup>a</sup>	38.0 <sup>b</sup>	39.9 <sup>b</sup>	39.9	18.1
Seeing world famous sites ( $M=3.49$ )	35.4 <sup>c</sup>	47.0 <sup>a</sup>	40.2 <sup>bc</sup>	44.1 <sup>ab</sup>	34.6 <sup>c</sup>	40.3	16.0
Feeling secure and safe ( $M=3.48$ )	34.2 <sup>b</sup>	43.4 <sup>a</sup>	44.6 <sup>a</sup>	39.5 <sup>ab</sup>	36.3 <sup>b</sup>	39.6	11.0
Lots to see and do ( $M=3.46$ )	34.2 <sup>b</sup>	44.0 <sup>a</sup>	41.0 <sup>a</sup>	40.3 <sup>ab</sup>	34.3 <sup>b</sup>	38.8	10.7
Easy to get a visa ( $M=3.46$ )	37.8 <sup>a</sup>	36.3 <sup>a</sup>	34.4 <sup>ab</sup>	30.1 <sup>bc</sup>	26.7 <sup>c</sup>	33.0	12.6
Great flight accessibility ( $M=3.44$ )	34.3 <sup>b</sup>	44.6 <sup>a</sup>	40.9 <sup>a</sup>	43.5 <sup>a</sup>	30.5 <sup>b</sup>	38.8	21.1
Good quality of life ( $M=3.44$ )	28.0 <sup>b</sup>	42.8 <sup>a</sup>	43.1 <sup>a</sup>	41.0 <sup>a</sup>	33.9 <sup>b</sup>	37.7	25.0
Cost accessible for middle class people ( $M=3.41$ )	37.0 <sup>bc</sup>	39.2 <sup>a</sup>	34.8 <sup>a</sup>	28.0 <sup>b</sup>	26.1 <sup>b</sup>	32.0	13.7
Feel free to travel around on your own ( $M=3.40$ )	32.7 <sup>bc</sup>	39.3 <sup>a</sup>	37.6 <sup>ab</sup>	35.1 <sup>bc</sup>	30.2 <sup>c</sup>	35.0	7.8
Feeling a wide, spacious outdoor environment ( $M=3.35$ )	33.7 <sup>b</sup>	41.9 <sup>a</sup>	42.4 <sup>a</sup>	38.3 <sup>ab</sup>	34.1 <sup>b</sup>	38.1	9.7
Local people are friendly and welcoming toward Indians ( $M=3.34$ )	35.0 <sup>ab</sup>	40.9 <sup>a</sup>	37.5 <sup>ab</sup>	33.9 <sup>b</sup>	32.0 <sup>b</sup>	35.9	6.8
Seeing wildlife in nature ( $M=3.32$ )	31.5 <sup>b</sup>	34.7 <sup>b</sup>	41.1 <sup>a</sup>	29.7 <sup>b</sup>	31.6 <sup>b</sup>	33.7	12.1
Visiting a place my friends would love to see ( $M=3.31$ )	34.8 <sup>a</sup>	45.4 <sup>a</sup>	48.9 <sup>a</sup>	34.8 <sup>b</sup>	33.2 <sup>b</sup>	39.4	29.5
Visiting/seeing local native people ( $M=3.29$ )	35.2 <sup>a</sup>	39.1 <sup>a</sup>	35.3 <sup>a</sup>	33.5 <sup>ab</sup>	27.6 <sup>c</sup>	34.1	10.4
Get away from summer heat ( $M=3.23$ )	28.8 <sup>c</sup>	43.9 <sup>a</sup>	37.9 <sup>ab</sup>	34.8 <sup>bc</sup>	32.1 <sup>bc</sup>	35.5	19.5
Experiencing a modern society ( $M=3.22$ )	30.5 <sup>b</sup>	41.0 <sup>a</sup>	35.7 <sup>ab</sup>	40.5 <sup>a</sup>	30.7 <sup>b</sup>	35.7	15.0
Experiencing an Indian Festival/culture in another country ( $M=3.21$ )	36.0 <sup>ab</sup>	41.4 <sup>a</sup>	34.5 <sup>bc</sup>	34.7 <sup>bc</sup>	29.5 <sup>c</sup>	35.2	10.6
A young society ( $M=3.21$ )	28.6 <sup>b</sup>	41.0 <sup>a</sup>	37.5 <sup>a</sup>	38.2 <sup>a</sup>	28.4 <sup>b</sup>	34.8	20.3
Has a large Indian community ( $M=3.20$ )	33.2 <sup>bc</sup>	41.7 <sup>a</sup>	31.1 <sup>c</sup>	37.9 <sup>ab</sup>	31.3 <sup>b</sup>	35.0	12.5
Good business opportunities ( $M=3.19$ )	29.6 <sup>c</sup>	38.6 <sup>b</sup>	37.2 <sup>b</sup>	44.9 <sup>a</sup>	28.3 <sup>c</sup>	35.7	27.6
Have friends or relatives there ( $M=3.13$ )	26.4 <sup>c</sup>	34.2 <sup>a</sup>	30.8 <sup>ab</sup>	31.4 <sup>ab</sup>	28.7 <sup>ab</sup>	30.3	5.5
Visiting the same places Indian celebrities go to ( $M=3.12$ )	33.9 <sup>b</sup>	45.9 <sup>a</sup>	40.0 <sup>ab</sup>	43.7 <sup>a</sup>	35.9 <sup>b</sup>	39.9	14.4
Good nightlife/clubbing/pubbing ( $M=3.12$ )	32.0 <sup>b</sup>	44.0 <sup>a</sup>	43.4 <sup>a</sup>	40.2 <sup>a</sup>	32.3 <sup>b</sup>	38.4	19.5
Judging whether the country is an appealing place to move to one day ( $M=3.12$ )	29.0 <sup>c</sup>	37.1 <sup>a</sup>	35.4 <sup>ab</sup>	30.5 <sup>bc</sup>	29.0 <sup>c</sup>	35.2	8.9
Job opportunities ( $M=3.10$ )	29.4 <sup>c</sup>	37.9 <sup>ab</sup>	37.6 <sup>ab</sup>	39.0 <sup>a</sup>	32.5 <sup>bc</sup>	32.3	10.0
Good educational opportunities ( $M=3.09$ )	28.4 <sup>b</sup>	43.1 <sup>a</sup>	41.0 <sup>a</sup>	43.1 <sup>a</sup>	33.0 <sup>b</sup>	37.7	25.7
Enjoying snow activities (skiing or snowboarding) ( $M=3.08$ )	28.1 <sup>c</sup>	40.9 <sup>a</sup>	38.4 <sup>ab</sup>	32.2 <sup>bc</sup>	33.9 <sup>bc</sup>	34.7	15.2
Seeing first hand what I learned in school ( $M=3.03$ )	26.3 <sup>c</sup>	37.6 <sup>a</sup>	35.8 <sup>ab</sup>	30.2 <sup>bc</sup>	29.5 <sup>c</sup>	31.9	13.4
Made Bollywood movies there ( $M=2.94$ )	32.1 <sup>c</sup>	47.4 <sup>a</sup>	38.7 <sup>b</sup>	38.8 <sup>b</sup>	29.7 <sup>c</sup>	37.3	17.4
Participating in active outdoor sports ( $M=2.91$ )	24.4 <sup>b</sup>	39.1 <sup>a</sup>	34.9 <sup>a</sup>	29.0 <sup>b</sup>	26.9 <sup>b</sup>	30.9	23.0
Part of old British culture ( $M=2.87$ )	25.9 <sup>b</sup>	46.9 <sup>a</sup>	30.5 <sup>b</sup>	30.7 <sup>b</sup>	27.1 <sup>b</sup>	32.2	44.7

Note: S.E.-A, indicates Southeast Asia; Numbers (mean values) in parentheses beside each attribute of destination motivators, for example, "Being in a clean, healthy environment ( $M=3.81$ )" indicate importance ratings when considering a pleasure trip outside of India for 4 nights or longer, measured on a 4-point Likert-type scale where 1 = not at all important, 2 = not very important, 3 = somewhat important, and 4 = very important; Numbers for each item in each destination indicate percentages (%) based on the selections for attributes of destination motivators that apply extremely well to each destination (Total  $N$  in each destination = 1,326); \*  $F$ -values for all items are significant at 0.001; \*\*, \* indicate the results from the Duncan's post-hoc multiple comparison tests ( $> .5 >$ ) and these subsets for significance level were tested at 0.001 instead of 0.05 due to the large sample size and all ANOVA test results that were significant at 0.001.

## ***Perceptual Map of the Five Destinations and Imagery Ratings of Destination Motivators***

The result of the CA provides graphic information with regard to the relationships between the five selected long-haul destinations (indicated as column variables) and the 33 imagery ratings of destination motivators (indicated as row variables). Each of the attributes is plotted on the perceptual map (Figure 1) with the positioning of each destination. The map, through multi variate analysis, illustrates the relative position of each destination and each attribute, based on their individual ratings. Thus, the perceptual positioning map highlights the relative similarities and differences in the joint space among the five long-haul destinations and attributes of best fit destination motivators of imagery ratings for each of the destinations. The proximity between a pair of points of column and row variables was used to interpret the strength of the underlying relationship between them; the closer together the points, the stronger the relationship (Greenacre 1993). In other words, the more a particular destination is uniquely associated with an attribute, the closer it is charted to it.

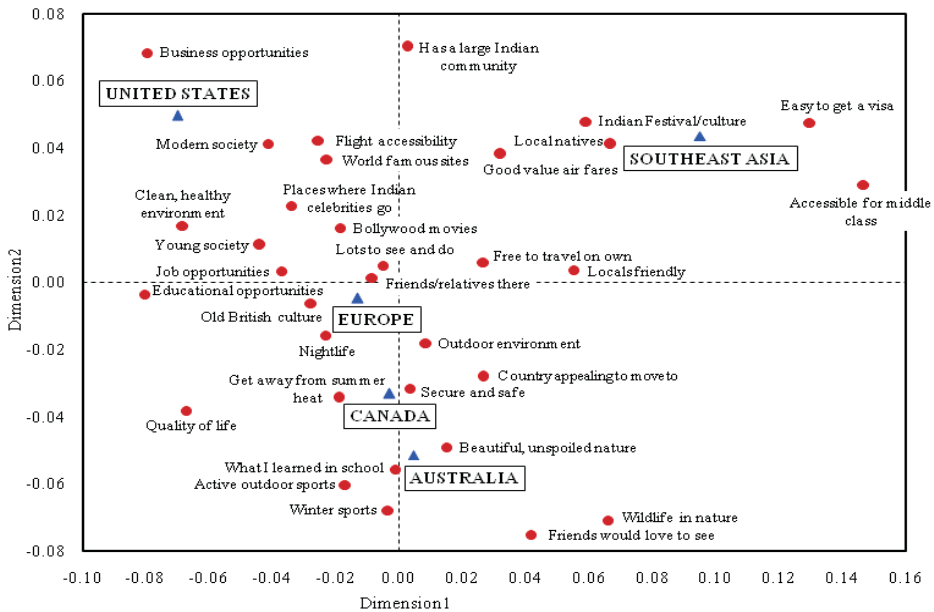
The values of the principal coordinates are plotted for positioning. With regard to the explained proportion of inertia of CA, a two-dimensional solution explains 82.3% of the variance with a singular value (eigenvalue) of greater than the critical value of 0.20 (Hair, et. al., 1998). The first dimension accounted for 50.8% of the variance (singular value = .316, principal inertia = .100,  $\chi^2 = 239.98$ ) and the second explained 31.5% (singular value = .249, principal inertia = .062,  $\chi^2 = 148.27$ ). Overall, these two dimensional axes can be interpreted to represent: “Business and Familiarity with Indian Culture” at the upper axis and “Outdoors and Nature” at the bottom axis for the first dimension and “Personal Status” at the left axis and “Accessibility and Affordability” at the right axis for the second dimension.

Focusing first on the destinations, potential Indian travellers perceived the five long-haul pleasure trip destinations as separate and distinct when rating best fit destination motivators to each. The United States is at one end of dimension one (upper, i.e. “*Business and Familiarity with Indian Culture*” and “*Personal Status*”), whereas Australia is at the opposite end (bottom, i.e. “*Outdoors and Nature*” and towards “*Accessibility and Affordability*”). Meanwhile, Europe and Canada are positioned between them. The results indicate that the United States and Australia reveal the most dissimilar pairs. The former represents “*Business*”, the latter “*Outdoors and Nature*”. The greatest dissimilarities in image of pairs of sites in dimension two were found for Southeast Asia (*Accessibility and Affordability*) and the United States (*Business*), with Europe, Canada, and Australia positioned between them.

From a compositional joint display of the destinations and imagery ratings of destination motivators, the proximity between the two categories determines the strength of the relationship. The United States was most likely to be perceived by potential Indian travellers as the best destination for “business opportunity”, “experiencing modern society”, “flight accessibility”, and “seeing world famous sites”, whereas Southeast Asia was most likely to be perceived as the strongest for “seeing local natives”, “experiencing an Indian festival/culture there”, “easy to get a visa”, “good value air fares”, and “accessible for middle class”. Potential Indian travellers were most likely to perceive Europe as a destination where quite different product experiences are offered. It is a must to partake of educational and cultural experiences, focusing on “old culture”, “nightlife and entertainment”, and “outdoor

environment” with friends/relatives who live there. From a broad perspective, Canada and Australia can be viewed as the same cluster with little differentiation in imagery. These two countries are associated with “outdoors” and “nature”. Canada was most likely to be perceived as the most appropriate long-haul pleasure destination for “escaping the summer heat” and as a “secure and safe place”, while Australia was most likely to be perceived as the best destination for “appreciating beautiful, unspoiled nature”, “seeing first hand what I learned in school”, “participating in active outdoor sports”, and “enjoying snow activities”.

**Figure 1. Perceptual Map of Five Long-Haul Pleasure Trip Destinations and Imagery Ratings of Destination Motivators plotted by Correspondence Analysis**



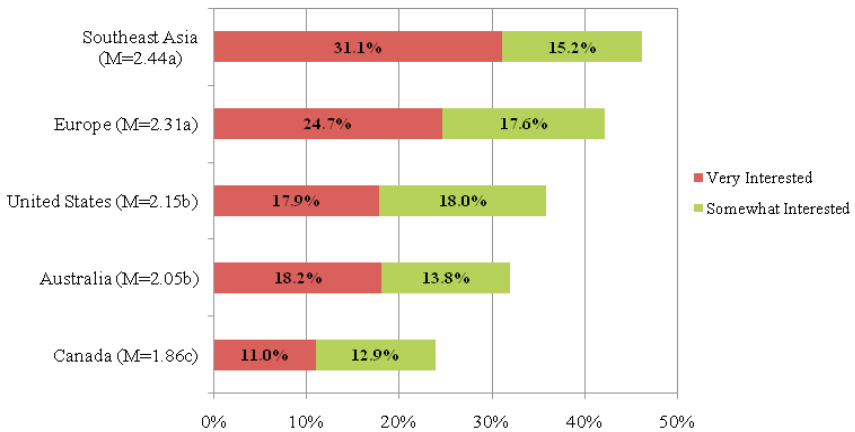
### Interest in Visiting the Destinations in the Next Two Years

Figure 2 shows one of the key long-haul travel indicators for potential Indian travellers, interest in visiting the destinations. Respondents were asked to indicate their level of interest in visiting the five selected long-haul destinations in the next two years. Results show that interest in visiting the destinations was low across the board, less than 50% for all five destinations, reflecting the fact that potential Indian travellers are still an emerging market for long-haul travel.

Southeast Asia was the top destination of interest among potential Indian travellers, with interest being both widespread at 46.3% in total ( $M=2.44$ ) and relatively strong (at 31.1% very interested), compared to other long-haul destinations. Europe's general appeal in this market was in second place (at 42.3%;  $M=2.31$ ), only slightly behind Southeast Asia. Among the remaining destinations, the United States placed in third, at 35.9% ( $M=2.15$ ), followed by Australia in fourth place with close to one third of the market interested in visiting (32.0%;  $M=2.05$ ). Canada was well down the priority list for future travel, with interest at 23.9% in total ( $M=1.86$ ) and relatively weak (only 11.0% were very interested).

According to the ANOVA test with the Duncan's post-hoc multiple comparison tests, the five long-haul destinations could be three distinct groups in terms of the level of interest in visiting the destinations (mean values) perceived by potential Indian travellers: Southeast Asia and Europe were in first place, the United States and Australia in second, and Canada in third.

**Figure 2. Interest in Visiting the Destinations in the Next Two Years**



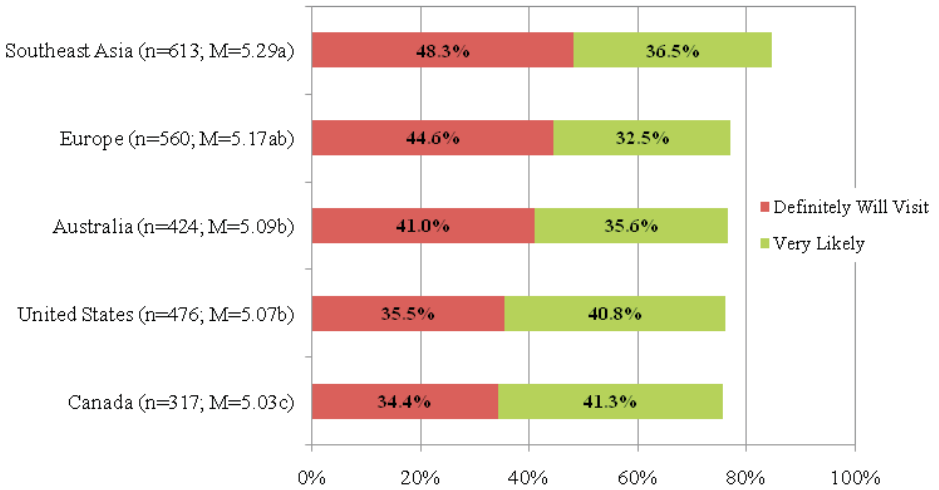
**Note:** Total *N* in each destination = 1,326; Numbers in parentheses in each destination indicate mean values (*M*) based on a 4-point Likert type scale (1=not at all interested; 2=not very interested; 3=somewhat interested; 4=very interested) and a, b, and c indicate the result from the Duncan's post-hoc multiple comparison test ( $a > b > c$ ); *F*-value = 50.2 ( $p < .001$ ) in One-way ANOVA.

**Likelihood of Visiting the Destinations in the Next Twelve Months**

Respondents who were 'very' or 'somewhat' interested in visiting the destinations in the next two years (per Figure 2) were also asked to indicate their level of likelihood of visiting these destinations in the next twelve months (Figure 3). Overall, potential Indian travellers who were 'very' or 'somewhat' interested were highly likely to visit the destinations since all have high mean values (more than five out of six points). The five long-haul destinations could be three separate groups. Southeast Asia was the highest in mean value of likelihood of visiting, Australia and the United States were the second highest. Europe could be in the first with Southeast Asia or in the second highest destinations with Australia and the United States according to the Duncan's post-hoc multiple range comparison tests, while Canada was the lowest and therefore constitutes a separate grouping.

Among the competitive set, Southeast Asia ranked the highest ( $M=5.29$ ), with 84.8% of potential Indian travellers who were 'very' or 'somewhat' interested in visiting Southeast Asian countries and indicating their likelihood of visiting the destination to be either definite (at 48.3%) or 'very likely' (at 36.5%). Europe was fairly strong in second place at 77.1% ( $M=5.17$ ). Australia and the United States followed closely and placed a healthy third (76.6%;  $M=5.09$ ) and 76.3% ( $M=5.07$ ), respectively. Although ranked the lowest among the competitive long-haul destinations, it is notable that Canada still fared well for likelihood of visiting (75.7%;  $M=5.03$ ).

**Figure 3. Likelihood of Visiting the Destinations in the Next Twelve Months**



**Note:** Results were based on only those who were very or somewhat interested in visiting each destination (*n*); Other numbers in parentheses in each destination indicate mean values (*M*) based on a 6-point Likert type scale (1=definitely will not visit; 2=not at all likely; 3=not very likely; 4=somewhat likely; 5=very likely; 6=definitely will visit) and a and b indicate the result from the Duncan's post-hoc multiple comparison test ( $a > b$ );  $F$ -value = 6.5 ( $p < .001$ ) in One-way ANOVA.

## Discussion and Conclusions

This study analyzed Indian perceptions of five long-haul pleasure trip destinations in order to explore the competitiveness of the long-haul destinations as perceived by potential Indian travellers, and the positioning of these destinations by using ratings of imagery attributes of destination motivators. The following discussion highlights the significance of the findings.

The analysis of the relative level of importance ratings of imagery attributes of destination motivators indicated that potential Indian travellers considered “being in a clean, healthy environment,” “appreciating beautiful, unspoiled nature,” “seeing world famous sites,” and “experiencing lots of things to see and do” to be the most important imagery attributes of destination motivators. Furthermore, price affordability (such as good value air fares and cost accessible for middle class people), destination accessibility (such as easy to get a visa and great flight accessibility), and safety and security issues were also perceived by potential Indian travellers as important imagery attributes of destination motivators. The results of this study indicate that potential Indian travellers prefer destinations that offer a clean and unspoiled natural environment, a variety of tourism resources with world famous sites, good value air fares with great flight accessibility, easiness to get visa, and security and safety.

On the other hand, potential Indian travellers perceived “part of old British culture,” “participating in active outdoor sports,” and “made Bollywood movies there” as the least important attributes when considering a long-haul pleasure trip to a destination outside of India. It is interesting to note that potential Indian travellers reported that they do not place

relative importance on “experiencing different cultures at destinations” and “recreational outdoor sports activities” compared to other imagery attributes of destination motivators. Rather, they were likely to consider “Indian culture related activities (such as experiencing an Indian festival/culture in another country, seeing a large Indian community and friends or relatives at destinations, and visiting the same places Indian celebrities go to)” and “future personal opportunities (e.g., opportunities for business, a job, education, and moving to one day)” as important imagery attributes of destination motivators, even for their long-haul pleasure trips. These findings may imply that many of the Indian travellers consider travelling for multiple purposes, for example, for pleasure and to explore future personal opportunities or to experience Indian culture/community in other countries. These results may be related to demographic characteristics of the sample as all respondents were males. Thus, this finding should be confirmed by further research on this market.

According to the results of ANOVA tests and the CA, potential Indian travellers perceived the five long-haul pleasure trip destinations as separate and distinct when rating best fit imagery attributes of destination motivators to each. The findings indicate that there are significant differences among potential Indian travellers' perceptions toward the long-haul pleasure trip destinations based on the imagery ratings of destination motivators. The findings provide useful and insightful information on the relationship between competing long-haul destinations and imagery attributes of destination motivators. This is an important observation and reaffirms that travel destinations, specifically the five selected long-haul destinations, must be prepared to differentiate their image of destinations and their range of experiences and services to appeal and attract more specific markets like India.

Southeast Asia was perceived to have differentiated imagery attributes when compared to those of the other destinations. Potential Indian travellers perceived that “accessibility and affordability” and “familiarity with Indian culture” are Southeast Asia's greatest strengths and highly positive imagery factors. This may be a consequence of geographical, economical proximity from India. Meanwhile, the United States and Australia, and the United States and Southeast Asia are the most dissimilar pairs regarding imagery attributes. Overall, the United States was perceived by potential Indian travellers as the most appropriate destination for “business and job opportunities.” In addition, “clean, healthy environment,” “great flight accessibility,” “good quality of life,” and “experiencing a modern society,” (higher for Australia) are strong imagery attributes for the United States as perceived by potential Indian travellers. Among potential Indian travellers, Europe is viewed as the most positive, preferred destination for all imagery attributes, excluding “seeing wildlife in nature” and “business and job opportunities.” Compared to other destinations, Europe is positioned in the middle. However, Europe may be too vague due to the fact that attributes differ among its countries. Therefore, a future study should consider a more accurate depiction of the region or list its countries in order to develop a clearer image of what Europe is to Indian travellers.

Although Canada was rated as the lowest for all imagery attributes, Canada is similar to Australia in perceived imagery attributes. From a micro perspective, Canada was most likely to be perceived as the preferred destination for “escaping the summer heat” and “secure and safe place”, while Australia was most likely to be perceived as the suitable destination for “appreciating beautiful, unspoiled nature,” “seeing firsthand what I learned in school,” “participating in active outdoor sports,” and “enjoying snow activities.” Australia

showed a similarity with Canada as an outdoor and nature oriented destination in its perceived image to potential Indian travellers, meaning that Australia is placed in a competitive market setting with Canada. The results of this study suggest that similar destinations should try to make an effort to differentiate its image from its competitor, which will place it in a superior market position over the competitor. The findings also suggest that long-haul pleasure destinations where potential Indian travellers consider making a pleasure trip in the future need to better position themselves so that increased demand for visitation may be generated to their respective destinations.

Potential Indian travellers were most interested in taking a pleasure trip to Southeast Asia and Europe in the next 2 years. The United States and Australia were the destinations that potential Indian travellers showed the next highest level of interest in visiting, while they showed the lowest level of interest in visiting Canada. Potential Indian travellers' overall interest in visiting was lower than 50% for all five long-haul pleasure destinations, confirming that India represents a huge potential untapped market. The results of this study suggest that tourism marketers in the five long-haul pleasure destinations should make efforts to enhance potential Indian travellers' awareness, to form positive, accurate images, and to increase their level of interest in visiting. At this point, a higher level of investment in awareness and image building may be required to increase interest and gain market share.

The majority (75%) of potential Indian travellers who were 'very' or 'somewhat' interested in visiting the destinations in the next two years were highly likely to visit the destinations in the next 12 months. Among the competitive set, Southeast Asia ranked the highest, followed by Europe, Australia, and the United States. Canada was the lowest. Overall, the selected destinations' general appeal in this market is actually fairly healthy. The findings suggest that tourism marketers in the five long-haul pleasure destinations should invest more heavily to raise brand/image awareness and close the gap between "interested in visiting," "considering visiting," and "definitely likely to visit" while building consumer awareness and images in a way that solidly differentiates a particular destination from its competitors.

At the time this study was completed, there had been few studies on the demand of Indian outbound tourism although the growth potential of this market is tremendous. With an estimated 50 million Indian outbound travellers expected by 2020, many destinations will benefit greatly economically. Thus, it is anticipated that this study will contribute a stimulating interest in this subject among academics and practitioners and to filling this void in the literature. The results of this study are expected to provide considerable information to competing countries and will facilitate the advancement of marketing and development strategies that will ensure the attraction of Indian outbound travellers.

In conclusion, this study demonstrated the competitiveness of the destinations using ANOVA tests and correspondence analysis. The results of this study suggest that these analyses can be effective as an approach to identify the market position of competing destinations, and to identify destination or product or image differentiation strategies to increase consumer awareness and attract more Indian travellers. In addition, the findings in this study have significant implications for destination competitiveness and the type of product development and marketing that should be undertaken to attract more travellers from



high-potential tourism-generating countries such as India. By incorporating the findings of the study, long-haul pleasure destinations where potential Indian travellers consider making a pleasure trip in the future should better position themselves so that increased demand for visitation may be generated to their respective destinations.

Further, destination marketers should be better equipped to address perceived weaknesses and to exploit perceived strengths when developing their marketing mix. Results should also be used to develop target markets and to better utilize resources to position destinations in order to become more competitive in the market. Once a destination has generated a high level of awareness and identified its product strengths in the specific market, the destination will be in a far stronger position to develop appropriate travel products and to market these products. Thus, it is hoped that the findings from this study may help the five destinations and their tourism practitioners obtain a competitive advantage and expedite the advancement of marketing and product development strategies that will ensure the attraction of Indian long-haul travellers.

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