

INCREDIBLE !INDIA : BRANDING OF A NATION

Indian tourism Industry was going through rough times in 2000-02. Global tourism itself had seen a downward trend because of a series of unfortunate incidents around the world such as the attack on the World Trade Center in New York and the Parliament house in New Delhi. People were being warned against traveling to India, hence India was no longer a part of travel brochures and travel itineraries were taking the bypass route.

This was a period of crises, but this was also a period of introspection. The need of the hour was to take some strong, turn around policy measures. It was time to change the image of India from that of a mystical land of sadhus and snake charmers into a Destination Brand with a unique identity which would capture its culture, tradition, rituals and natural beauty on one hand and at the same time convey a contemporary feel of a modern, youthful and a developing nation. It was time to sell India as a preferred tourist destination to the world. It was time for '*Incredible India*'.

WORLD TOURISM INDUSTRY

Tourism industry is one of the world's largest industries employing more than 235 million people worldwide and generating around 9.2% of global GDP¹. According to the World Travel and Tourism Council (WTTC), Travel and Tourism industry will continue to drive the global economy and create more jobs. Emerging economies, such as China and India would be the engines of this growth because of factors such as increase in per capita income and higher investment in infrastructure development.

INDIAN TOURISM INDUSTRY

Today Tourism Industry is the largest contributor to the Indian GDP (6.23%) and the second highest foreign exchange earner for it. This industry generated about US\$100 billion in 2008 and it is expected to increase to US\$275.5 billion by 2018 at an annual growth rate of 9.4%². By 2020, tourism is expected to provide 10.4% of total employment and could contribute US \$ 330 billion to the GDP, says World Travel and Tourism Council (WTTC)³.

NATIONAL TOURISM POLICY – 2002

Through the 1960s to the 1990s the number of people traveling to various destinations through out the world was increasing substantially. It was 100 million in 1964 and had increased to 700 million in 2001. It was a matter of great concern that India's share in the world tourism market had remained static at a meagre 0.38%. Tourism had remained a neglected subject since India's independence in 1947 because of other key areas such as education, literacy, health care, agriculture and infrastructure demanding greater focus. In spite of this the number of visitors to India had managed to grow from 15,000 tourists in 1950 to 2.64 million in 2000 "(See Exhibit 4)". This meant that India had vast unexplored potential for tourism, which required national priority to be fully utilised. The Government of India realised that to become an active participant in the global tourism arena it needed to change its strategies, tools and methods of implementation. In order to address this issue it came out with a National Tourism Policy in 2002 in association with the Department of Tourism, Ministry of Tourism and culture. The policy provided direction on several issues such as positioning of Indian tourism, enhancing India's competitiveness, product development, Infrastructure, strategies for effective marketing and above all creating an 'India Tourism' brand position.

INCREDIBLE !INDIA CAMPAIGN

The National Tourism Policy (NTP) can be considered as the incipience that gave birth to the idea of making India Incredible! Creating an Indian Tourism Brand position was identified as a key marketing strategy in the

¹ <http://www.wttc.org/>, accessed June 11, 2010

² http://www.ibef.org/Archives/ViewArticles.aspx?art_id=19777andcat_id=194, accessed on June 11, 2010

³ http://www.wttc.org/bin/pdf/original_pdf_file/2010_exec_summary_final.pdf, accessed on June 11, 2010

policy. The NTP 2002 states, *“In the international market, India requires a positioning statement that captures the essence of its tourism product to convey an “image” of the product to a potential customer and which will become the India “Brand”*”. It further states, *“The India's positioning statement and branding should focus on what makes India unique and unmatched in the tourism world”*. The inspiration for this was drawn from the already famous branding exercises undertaken by some of the world famous tourist destinations such as 'Amazing Thailand', 'Malaysia, Truly Asia', 'The Philippine's ' Festival Islands' and Egypt's 'The Land of the Pharos'.

Though the idea was conceived through NTP, the credit for developing it further and implementing it is attributed to Mr. Amitabh Kant, Former Secretary, and Director General, Ministry of Tourism, Government of India. In order to give direction to the initiative of developing Brand India, and to bring all parties connected with this effort on a single platform, The Ministry of Tourism, Government of India laid out a Vision Statement and established the Key Objectives for the growth of the tourism sector in the National Tourism Policy 2002.

VISION FOR INDIA TOURISM

“Achieve a superior quality of life for India’s people through Tourism which would provide a unique opportunity for physical invigoration, mental rejuvenation, cultural enrichment and spiritual elevation”⁴.

KEY OBJECTIVES

To transform the vision of India Tourism into reality, tourism ministry developed five key strategic objectives⁵.

Key Objectives

- *Positioning and maintaining tourism development as a national propriety activity*
- *Enhancing and maintaining the competitiveness of India as a tourism destination*
- *Improving India’s existing tourism products and expanding these to meet new market requirements*
- *Creation of world-class infrastructure*
- *Developing sustained and effective marketing plans and programmes*

SEGMENTATION, TARGETING AND POSITIONING ANALYSIS

The Indian Government wanted to develop the Indian brand as a premier holiday destination. For this India tourism had to shift its focus from low-volume, low-value market segment to up-market, high-value market segment. The analysis of Foreign Tourist Arrivals from 15 source countries”(Exhibit 3)”, and their percentage market shares during 1990-2002 helped to identify and define strategy for each of the markets. During the decade of the nineties, Bangladesh, UK and USA were the major source countries contributing to more than 40% of Foreign Tourist Arrivals (FTA) in India. Following strategies were adopted

- To build or grow the markets which were showing positive trend and had up-market potential
- To maintain the markets where India always had a presence but FTAs were more or less sluggish
- To identify and develop new, emerging markets, which had huge potential

It was observed that FTAs in India were mainly in the age group of 25- 44 “(See Exhibit 3)”. The age groups of 45-54 and 55-64 were showing an upward trend. The target market identified comprised of high net worth individuals who were educated, held white-collared jobs and could be of any age between 25-65 years.

Until 2002, there was no uniformity in the identity, message or positioning of Brand India by the eighteen tourism offices of Ministry of Tourism abroad. Different tourism offices were giving different messages like “Spiritual India”, “Unbelievable India”, ‘Cultural India”. Similarly various state tourism boards were promoting their states separately and there was no relation between them. The primary task was to integrate all state

⁴ <http://tourism.gov.in/policy/Tourismpolicy.pdf>, accessed on June 16, 2010

⁵<http://tourism.gov.in/policy/Tourismpolicy.pdf> , accessed on June 14, 2010

tourism boards and position India uniformly all across the world. The various promotional literatures were also portraying the image of an age-old India displaying sadhus in Himalayas and rope-trick performances. Hence it was vital to change this impression of a traditional India to a modern, vibrating and young India offering target specific distinct, pleasant and enjoyable tourism experience.

India has a variety of tourism products to offer to its diverse target audience. Therefore the key for developing a positioning statement was to encompass all the unique attributes of India. India's point of differentiation was its rich culture, heritage, ayurveda and spiritualism. Hence Ministry of Tourism decided as a place for rejuvenation, wellness, self-discovery and finding peace and spiritual elevation to the up-market, astute traveler who is looking for a unique travel experience. India Tourism launched "Incredible India" campaign in October 2002.

BRAND INDIA

In order to establish itself in the minds of the consumer, India needed a powerful expression which would be memorable, impressive, alluring and contemporary and would also be able to communicate the flavor and spirit of India with all its richness. Consumer research was carried out which showed that the expression 'Incredible India' could be all of that. India is a huge country, larger than the 23 countries of Europe put together and along with its 28 states it could serve as a multi product destination for the tourists. It is also a land of diversity where conventions and modernity coexist. There was a need therefore to establish a single Mother Brand under which various states offering their own unique attractions could be developed into sub-brands.

The phrase 'Incredible India' was given a unique creative style, where an exclamation mark '!' was used in place of the 'I' of India and the result was an iconic new logo '**Incredible India!**' The dot in the exclamation mark represented a *Bindi* which is a symbol of Indian spiritualism. The exclamation mark added a fascinating appeal to the logo and made it more attractive. The credit for this goes to Mr. V. Sunil who was then working as the Creative Director, O & M, New Delhi⁶ Ms. Rathi Vinay Jha who was the Secretary of Tourism and Mr. V.K. Duggal the then Director General of Tourism also contributed significantly towards the Incredible India Brand.

The Brand strategy developed around certain important aspects such as identifying the differentiating factor and determining the value proposition, Integrated marketing communications strategy, continuous market research, exploring new and innovative strategies, commitment and support of the Government of India, regular interaction with all stakeholders such as the travel agents, writers, tourists, travel councils etc and transforming the tourism officials into brand managers and brand ambassadors.

INCREDIBLE INDIA – A 360° CAMPAIGN

A 360° approach was taken where all possible tools of marketing were used in synergy to convey the brand meaning India experience. The campaign adopted a strategy of integrated approach using print, electronic, on-line as well as out of home media in tandem to address the predefined target audience. Personal relations were built with the travel and trade community including tour operators, journalists, travel writers and other key stakeholders.

When the campaign started in the year 2002-03, it was allocated a miniscule budget outlay of around Rs. 15.71 Crore. After seeing the effectiveness of the campaign in generating a huge favorable response and winning several awards in the international arena, the budget was increased to Rs 220 Crore⁷. The campaign itself found great support from the corporate sector in the form of resources generated by the 'Experience India Society' which is an association of well known and leading hoteliers and tour and travel operators in India.

⁶ http://www.afaqs.com/perl/news/story.html?sid=24414_The+way+India+was+branded, accessed on June 17,2010

⁷ Amitabh Kant, "Branding India- An Incredible Story", Harper Collins, Noida, (2009), Chapter 1, Page17

Based on the awareness levels of India as a tourist destination, the targeted countries were divided into three specific groups and the campaign was unveiled in a phased manner. Phase one included India Aware countries, which were further, classified into western countries e.g. US, France Italy etc and short haul destination countries such as Malaysia, Singapore and UAE. Phase two also covered the India Aware countries but these had some cultural similarities with India such as China, Japan and South Korea. The third phase targeted those countries which had no or very low awareness of India as a tourist destination i.e. India Unaware countries such as Russia.

The campaign opened with a new theme every year but two things remained constant. One was the logo Incredible India, and other was the use of bright and bold colours, which crafted a vibrant and colourful personality of India, vastly different from that of the western world. These yearly campaigns were interspersed with unique country based theme campaigns, which coincided with special events, festivals or trade shows in that country.

T.V. CAMPAIGN

Incredible India campaign was aired throughout the world on leading television channels such as BBC, CNN, Discovery, National Geographic Channel, Sky News, Fox, Travel Channel and Euro News etc at prime time.”(See Exhibit 9)” The campaign was also shown on the US on Discovery's travel channel. Ad spots were chosen around high visibility programs on television channels e.g. the Incredible India Ads appeared on E! Entertainment channel during the telecast of Oscars, Grammy and the BAFTA Awards. Other Important events, which were of great interest to the world at large, were also chosen to air the TV commercials e.g. the Olympics that were held in China in 2008, Cannes Film festival and World Economic Forum annual meet held at Davos in Switzerland.

In-flight advertisements were shown on flights of specific airlines that operated in the targeted source countries. Singapore Airlines was the first airline to do so. Other International carriers such as British Airways and Lufthansa followed suit

Many advertising agencies worked on the campaign. It was primarily O & M, Grey World Wide and Wieden + Kennedy (A advertising at that time) who were given the task of developing the television and print creatives respectively. Over the decade many more agencies joined in e.g. The Idea Works, Crayons, Span Communication, Zenith Optimedia etc who worked on various sub campaigns in different countries.

PRINT ADVERTISING

From the beginning itself, Print advertising played a key role in all marketing communication campaigns. In the first year (2002-03) the campaign chose The Tajmahal, The Varied Landscapes, The Tiger and The Yoga as the central theme showcasing the various flavours that India could provide. The print ads were released in leading luxury and lifestyle magazines abroad, mainly USA and UK.

In 2003-04, the theme of spirituality was chosen, which emphasised on the ability of India to provide rejuvenation of mind, body and soul. The print ads during 2004-06 focused on India's rich culture and heritage. Year 2006-07 witnessed a combination of spectacular images and bold, ironic and self-assured messages, which were completely different from the previous ones. E.g. “Not all Indian are polite, hospitable and vegetarian” with a background image of the Royal Bengal Tiger. “The Colours of India campaign launched during 2007-08 emphasised India’s varied cultural spectrum covering 71 leading newspapers and magazines. In 2008-09, the campaign chose a unique ‘Motherland’ theme, which showed foreigners who had chosen India as their motherland, endorsing Brand India.

The print campaign targeted USA, Canada, Brazil, Argentina, UK, France, Germany, Italy, Spain, Netherlands, Denmark, Finland, Norway, Sweden, Russia, China, Korea, Australia, Singapore, Malaysia and Japan by using various leading travel, lifestyle, luxury magazines and publications and in-flight magazines. The Campaign ‘Visit

India 2009' used a caption 'one special reason to visit India in 2009' and gave rationale for tourists to come to India with various sales promotion offers. The Tourism Ministry also leveraged many other advertising opportunities like branding in CondeNast Traveller on the occasion of World Travel Mart (WTM) with special integrated supplement of the publication.

WEBSITE / INTERNET/ DIGITAL ADVERTISING

The first step Ministry of Tourism took was to develop a user friendly and a functional website which would give all relevant information about tourism India. In addition to this. The website www.incredibleindia.org also promoted online campaigns, offered online packages, provided live availability search, enabled online booking and linked travel agents and operators. As a part of continuous up gradation, many micro sites were created specific to various products like ayurveda, yoga, spirituality MICE (Meetings, Incentives, Conferences and Exhibitions) etc. The website followed the theme of the 'Incredible India' campaign for that particular year. Country specific versions of the website such as www.incredibleindia.co.kr (Korean version) were also launched.

For online campaign, the Ministry of Tourism used various popular websites like MSN, Yahoo, CNN, Wall street journal, Nasdaq, Discovery, Washington Post, Google, Travelocity, Indiatimes, Rediff., orange.fr, tonline, libero.com, zuji.com, news.com.au, etc. Even the country specific popular sites like Baidu (China), Yandex (Russia), Nikkei (Japan), Terra (Spain), khaleejtimes.com were used.

Search engine optimization, search engine marketing and social media optimization were also used by the Incredible India campaign to promote India tourism. A dedicated channel for showcasing 'Incredible India' was taken on YouTube, one of the most popular video sharing sites. The videos posted on YouTube had recorded nearly 6,00,000 views since November 2007 till July 2008⁸.

OUTDOOR ADVERTISING

'Incredible India' campaign traveled across the world through a sequence of outdoor advertising, painting the landscape of various prime locations in it's own bright colours. As a part of outdoor campaign, billboards and display panels were put up at various strategic locations at the Heathrow Airport in London, Charles de Gaulle Airport in Paris, Changi Airport in Singapore, the Dubai International Airport Cromwell Road in London, *Nieuli Montparnesse Square* in Paris and Times Square above MTV live studio in New York. This ensured brand visibility and helped to target international tourists and business travelers.

A good example of effective outdoor advertising was the 'India Now' campaign in July to September 2007 where buses and taxis plying along the main routes in London were painted with vibrant 'Incredible India' colours and messages. Apart from this, the ministry of tourism organized Incredible India road shows in various countries like UK, Canada, Singapore, Malaysia, Russia, Australia, New Zealand etc to attract tourists.

EVENTS AND EXHIBITIONS

By associating itself with prestigious events across the world, the brand also managed to leverage the credibility and reach of these events. As a first step towards this and also with the purpose of uniting the scattered efforts of Indian travel trade, the Ministry of tourism organised the International Travel and Tourism Mart (ITM) in September 2003 in Delhi. In the same year the Ministry put up an 'India Pavilion' at the Pacific Asia Travel Association (PATA) Travel Mart, held in Singapore. The World Travel Mart (WTM), which is an event organised in London annually also saw the determined effort of the Indian travel fraternity, again in the form of 'India Pavilion'.

Over the years the Brand has been a part of many more events, but a few that deserve a special mention, are

⁸ "Incredible India Newsletter", Ministry of tourism (June – July 2008)

as follows:

- **ITB, Berlin, 2007** - *Internationale Tourismus Bourse (ITB)* is worlds leading travel and Trade show organised every year in Berlin, Germany. In the year 2007, India was the partner country and every activity was pre-planned right from the invitation cards to the structure and design of the 'India Pavilion' and the gala shows. India as a partner country hosted a glitzy pre-launch party – 'The India Evening' that gave the visitors a preview of the days to follow. There were dance performances and dazzling cultural and fashion shows. A sumptuous 29-course meal was laid out for which chefs were flown in especially from India. Some other activities undertaken by the Indian contingent were, business meetings, presentations, folk dances, mehendi and bangle stalls, handicrafts display and mock Indian weddings.
- **'Incredible India' @ 60 in New York** – Year 2007 was the 60th year of India's Independence. Ministry of Tourism joined hands with the Confederation of Indian Industries (CII) to present to the world a Democratic, Diverse and Demographically Unfathomable India that was fast embracing the road to development. It was a panorama of activities, seminars, cultural shows, festive evenings and Bollywood (Indian film industry) for continuous four days. State tourism booths were also put up. Special aromatic spices were at display that added to the Indian flavour. World-renowned sculptor Sudarshan Patnaik created an awe inspiring sand sculpture of The Tajmahal. Incredible India hoardings and signages flooded the city. The Indian business fraternity also participated with great vigour and enthusiasm and was represented by visionary leaders such as Nandan M. Nilekani and Sunil Bharti Mittal. Leading American Universities such as Harvard, Yale and Columbia University organised panel discussions and conferences on India relevant topics.

PR ACTIVITIES

The Ministry of Tourism initiated a special Hospitality Program in which leading journalists, freelance writers, editors, photographers, tour operators and travel agents were invited as guests. The ministry sponsored the entire package, starting from air ticket, hotel booking, site seeing, lunch, dinner etc. In turn, India got featured in many leading publications and TV Channels like National Geographic, CondeNast Traveller, Financial Times, GEO, Australian Way, Travel and Leisure, Forbes Asia, Leficaro, Asian Geographic, Destin Asian. Write-ups and articles appeared in many in-flight magazines such as Cathey Pacific–Discovery; Air France, Going Places etc. "(See Exhibit 13)" As part of the PR program, the Ministry of Tourism partnered with Jet Airways and Kingfisher airlines for travel arrangements of trade partners, tour operators and travel writers.

A note worthy PR exercise by the ministry was the Jade Goody letter campaign in UK. During a popular TV show – 'Celebrity Big Brother' in UK, a leading participant, Jade Goody expressed some negative remarks about India and due to this controversy; the viewership of the show got a boost. Indian Tourism office used this to their advantage and wrote an open letter to Jade Goody inviting her to India to get to know the real India. This letter was published in many leading newspapers like the Times, Guardian, Independent etc. In turn, Incredible India got huge publicity as almost all TV channels such as the BBC, Channel4, CNN, radio stations and digital media discussed the topic.

Indian Tourism, Ministry of Tourism also started a newsletter and a bi-monthly magazine named "Incredible India" to enhance communication within travel fraternity. Tour operators and travel agents were invited for various overseas marketing meets, conferences so as to develop rapport and long-term relationships with them.

SALES PROMOTION ACTIVITIES

The Ministry of Tourism undertook various other initiatives to influence and expedite the tourists' buying process. One such initiative was 'Visit India' campaign 2009, wherein various complimentary packages were offered in partnership with member hotels of Hotel Association of India, airlines like Air India, Jet Airways, Kingfisher and tour operators across India.

THE RESULTS

The Incredible India campaign was very successful and this was evident by the fact that the number of FTA's in India improved significantly from 2.38 Million in 2002 to 5.11 million in 2009. The Foreign Exchange Earnings increased from Rs 150 billion in 2002 to Rs 550 billion in 2009⁹. "(See Exhibit 5)" 2009 witnessed a global slowdown and tourism industry was also adversely affected due to H1N1 global pandemic and terrorist activities but the contraction in growth rate of FTAs in India was less (3.3%) as compared to the world (4.3%)

Incredible India campaign had managed to create an impact on the world. Though it was heartening to see such positive response, India still was not amongst the top 15 tourist destinations of the world. The total FTA in India in the year 2004 was close to 3.5 million, which was way below that of countries such as Singapore, Thailand and Malaysia that enjoyed FTA upwards of 7 million annually.

CHALLENGES AND THE WAY AHEAD

The biggest challenge was to communicate a single brand message, which could encompass all Indian sub-brands and give a sense of its vibrancy and dynamism. India being a multi product destination, it was much difficult to market than some of the single product destinations such as Maldives or Switzerland. Another challenge was to continuously evolve the brand and keep it afresh and appealing.

A tough reality about brand building is that the expectations built by the brand and the promises made must be kept otherwise the whole activity may backfire. A country brand unlike a corporate brand does not have a single ownership or control. The challenge was to get a buy-in of all parties and hence inclusive or equitable growth and employment generation was seen as a major objective in the NTP 2002. Certain other challenges that faced the initiative of building 'Brand India' were –

- Developing infrastructure
- Building commitment and ownership for brand India amongst the Indian people at large
- Evolving strong and effective civic governance that could create an environment of growth, dedication and safety and security.
- Ensuring higher impetus by the private sector and creating linkage between 'Incredible India' branding campaign and promotional efforts of the business community

In spite of having many challenges the future for Brand India looked very promising. In all the new and developing tourism products India had something unique to offer. India was beginning to visualise the changing tastes of the globe trotter and was keenly building new tourism products that would strengthen the visitor's interest in India, make India into a multi seasonal destination and result in higher tourist yields.

Incredible India campaign was appreciated throughout the world by various professional bodies, organizations and people in general. This is apparent through the list of Awards and Accolades won by 'Incredible India'.

"One of the biggest Marketing success has been the 'Incredible India' campaign. This campaign is now 8 years old and continues to be our mantra for attracting foreign visitors. The creatives used in the campaign have been very popular and won several accolades globally. The State governments have also been successful in building sub brands but the sub brands can be leveraged effectively if used along with the Mother Brand 'Incredible India'."

Ms. Kumari Shelja, Union Tourism Minister, speaking at the inauguration of the inter-state regional conference of Tourism Ministers of southern States/UT administrations.

⁹ Annual Report, Ministry of Tourism, Government of India 2009-10, accessed on July 1, 2010

Exhibit 1

Foreign Tourists Arrival in India during 1996- 2008

Year	FTAs in India	Annual Growth (%)
1996	2287860	7.7
1997	2374094	3.8
1998	2358629	-0.7
1999	2481928	5.2
2000	2649378	6.7
2001	2537282	4.2
2002	2384364	-6
2003	2726214	14.3
2004	3457477	26.8
2005	3918610	13.3
2006	4447167	13.5
2007	5081504	14.3
2008 *	5366966	5.6

* Provisional

Source: India Tourism Statistics 2008, Ministry of Tourism, Market Research Division, accessed on June 1, 2010; an original document extraction

Exhibit 2

Foreign Exchange Earnings from Tourism in India during 1996- 2008

Year	FEE in INR Terms	
	Rs. Billions	%Change over the previous year
1996	100.46	19.2
1997	105.11	4.6
1998	121.50	15.6
1999	129.51	6.6
2000	156.26	20.6
2001	150.83	-3.5
2002	150.64	-0.1
2003	207.29	37.6
2004	279.44	34.8
2005	331.23	18.5
2006*	390.25	17.8
2007*	443.60	13.7
2008 #	507.30	14.4

* Revised Estimates # Advance Estimates

Source: India Tourism Statistics 2008, Ministry of Tourism, Market Research Division, accessed on June 1, 2010; an original document extraction

Exhibit 3

Foreign Tourists Arrivals in India According to Age Group during 1996-2008

Year	Arrivals	% Distribution of FTAs by Age Group (in Years)							
		0-14	15-24	25-34	35-44	45-54	55-64	65and Above	Not Reported
1996	1923695	12.6	9.1	21.7	26.8	18.3	8.8	2.7	-
1997	1973647	9.9	10.1	23.4	26.9	18.9	8.2	2.	0.6
1998	1974815	5.0	16.8	23.8	26.0	18.2	8.3	1.9	-
1999	2025031	3.1	14.0	23.4	27.5	20.8	9.2	2.0	-
2000	2152926	3.9	11.4	22.6	27.0	23.1	9.9	2.1	-
2001	2537282	7.0	10.8	20.1	21.1	19.4	11.9	6.7	3.0
2002	2384364	9.2	10.0	19.4	21.6	19.4	11.5	7.7	1.2
2003	2726214	7.2	10.0	19.5	21.6	19.4	11.5	7.7	3.1
2004	3457477	8.5	9.8	18.8	21.6	19.4	12.8	8.2	0.2
2005	3918610	8.6	9.6	18.8	21.3	19.5	13.0	8.7	0.5
2006	4447167	9.6	8.7	18.3	21.3	19.6	13.5	7.0	1.9
2007	5081504	9.2	8.6	18.0	21.4	19.6	13.9	7.5	2.2
2008*	5366966	7.5	7.1	15.2	17.1	16.1	11.9	6.5	18.6

* Provisional

Source: India Tourism Statistics 2008, Ministry of Tourism, Market Research Division, accessed on June 1, 2010; an original document extraction

Exhibit 4

Percentage Share of Top 15 Source Countries in Foreign Tourists Arrivals in India During 1996-2008

Year	USA	UK	Bangladesh	Sri Lanka	Canada	France	Germany	Japan
	1	2	3	4	5	6	7	8
1996	10.00	15.77	14.09	4.69	3.24	4.08	4.36	4.33
1997	10.29	15.61	14.97	5.14	3.31	3.85	4.46	4.20
1998	10.37	15.96	14.40	5.02	3.40	4.15	3.99	3.80
1999	10.15	13.90	16.70	4.84	3.34	3.46	3.43	2.96
2000	13.15	16.33	15.64	4.88	3.17	3.78	3.17	3.70
2001	12.97	15.98	17.00	4.45	3.49	4.04	3.15	3.18
2002	14.60	16.27	18.28	4.53	3.93	3.28	2.72	2.50
2003	15.07	15.81	16.68	4.00	3.95	3.58	2.82	2.86
2004	15.22	16.08	13.81	3.72	9.93	3.81	3.37	2.80
2005	15.60	16.63	11.65	3.48	4.02	3.89	3.07	2.63
2006	15.67	16.51	10.89	3.48	3.97	3.94	3.53	2.68
2007	15.72	15.67	9.45	4.02	4.10	4.03	3.62	2.86
2008 *	15.43	14.67	10.06	4.26	4.17	4.06	3.90	2.81

Year	Australia	Malaysia	Singapore	China	Russia	Italy	Korea (South)
	9	10	11	12	13	14	15
1996	2.13	2.33	2.06	0.25	0.96	2.18	0.71
1997	2.13	2.54	2.19	0.31	0.77	2.27	0.65
1998	2.45	2.01	2.30	0.18	1.25	2.29	0.69
1999	2.94	2.12	2.15	0.26	1.39	2.04	0.77
2000	2.04	2.28	1.76	0.54	1.31	1.90	0.88
2001	2.08	2.28	1.69	0.55	0.60	1.63	1.07
2002	2.13	2.67	1.86	0.65	0.78	1.56	1.23
2003	2.15	2.60	1.77	0.78	0.99	1.72	1.31
2004	2.36	2.44	1.76	0.99	1.36	1.90	1.38
2005	2.46	2.46	1.75	1.15	1.44	1.73	1.27
2006	2.47	2.41	1.86	1.40	1.40	1.80	1.58
2007	2.67	2.22	1.83	1.73	1.49	1.84	1.66
2008 *	2.76	2.22	1.87	1.84	1.70	1.66	1.53

**Provisional*

Source: India Tourism Statistics 2008, Ministry of Tourism, Market Research Division, accessed on June 1, 2010; an original document extraction