

Has your vacation been truly a dream vacation?



Has your choice of a tour operator helped to make it truly a dream vacation?

A tour operator is the person responsible for actual arrangements of transport and accommodation facilities for any tour or vacation. The hotel, the conveyance, the flight, and all other amenities and facilities are looked after by the tour operator. All the finer aspects of a tour are the responsibilities of the tour operators. He has greater stakes attached to a vacation, and he is also the person who derives maximum benefits through a contract. However, he is also the one who has to sweat it out right from the preparations to the time when the tourists finally return to the starting point.

Travel Agent

The inclusion of the word agent in "travel agent" gives a clue to the role and functioning of these people. A travel agent sells attractive tour packages to people interested in vacations. In fact, travel agents are middlemen between tour operators and prospective clients as these people have a client base and are experts in matching tours and vacations to suit the needs and requirements of their clients. Travel agents have various packages under their belt and can help a family looking for vacation destinations to select an ideal tour, customizing the package to make it

tailor made for a family. Families go to the travel agents with a specific budget, tentative travel dates, and preferred destinations, and it is the job of the travel agent to match the requirements of a family with the best available vacation plan at his disposal. This they do after consulting the tour operators and the plans they have.

Travel Agent vs. Tour Operator

When you want to go on a vacation, do you turn to, a travel agent or a tour operator? To many people who are not habitual vacationers, terms such as travel agent and tour operator seem to be synonymous to be used interchangeably. In fact, there are many similarities between the roles performed by these two title holders. However, there are differences in the functions of travel agents and tour operators that will be highlighted in this report for the benefit of vacationers.

What is the difference between Travel Agent and Tour Operator?

- While both tour operators and travel agents are involved in providing a tourist with relaxing and wonderful vacations, there are differences in their roles and functions
- A travel agent is like a waiter at a restaurant as he welcomes the guests and takes orders for packages that are prepared by the tour operator.

• A travel agent has many vacation packages under his belt, and he suggests or recommends tour plans to his clients based upon their budgets and other requirements.

• A tour operator has the responsibility to look after the finer details of a vacation or tour such as hotel, accommodation, meals, conveyance etc.

• With a tour operator taking up the bulk of the responsibilities, his fee is obviously much greater than that of a travel agent.

• With the advent of the internet, more tour operators have obliterated the need of travel agents and are directly providing their services to their clients.

• However, there are people who love to go the traditional way by involving a travel agent before embarking on a vacation.

Outbound tourism in India

India is one of the fastest growing markets of outbound tourists. Even in the present economic scenario, the Indian economy continues to grow at about 8% every year.

Mumbai and New Delhi are the two biggest outbound tourist markets in India, contributing over half of all overseas travel from the country. Mumbai (33%) & New Delhi (26%) are the two biggest outbound tourist markets in India. Mumbai is also the

business hub of India. The outbound trips by Indians for business purposes are twice as many as those for leisure, visiting friends, relatives and other reasons.

Foreign tourist boards are gearing up to meet the growing number of Indians who are travelling abroad and splurging. Starting direct flights is the first step. Never mind the sluggish economy and poor sentiments, there's good news from the world of travel and tourism. India has emerged as the world's fastest-growing outbound market and in absolute numbers it is second only to China. The number of Indians travelling overseas is set to rise from around 15 million today to 50 million by 2020, according to Tourism Australia.

Travel to Meet Family

In pre-liberalisation days, with little disposable income and fewer options, holidays for most middle-class Indians were about visiting friends and families in India. It is a trend that is playing out well overseas among globetrotting Indians.

According to the Amadeus-Frost & Sullivan report, a high 43% of leisure travelers from India say visiting friends and relatives (VFR) was the main reason behind their overseas travel.

Partly this has to do with the growing diaspora – estimated by the government at 25 million but Kalra puts it at around 100 million. The VFR travelers behave differently than standard vacation travellers, says Ankur Bhatia, director, Amaedus India. “They travel for longer periods, and typically do not book hotels but stay with friends and relatives,” he says.

Extended Weekends – Abroad

Weekend holidays in nearby hill stations are passe. Now with direct flights to a number of foreign tourist destinations, Indians would rather spend their extended weekends overseas.

Growth at the Top and BOP

Experts see two categories of Indian travellers growing – at the top end and the bottom end – as incomes rise. This isn't true just for India but Asia Pacific at large. From around 700 million people in the middle class in 2011, the number is set to touch 2.1 billion by 2030, signalling the rise of what is called the consuming class (annual household income of \$5,000 plus). The biggest chunk of this growth will come from China and India.

4. THE TEST METHODOLOGIES USED:

The parameters for a service industry like Travel Operator cannot be tested in a lab. **CONCERT** identified three ways to assess these. They are:

A. DT or Desk Test: Comparison of the vendors from published information, both from the vendors and from the regulatory bodies. We list down all the parameters to be tested; group them into categories that broadly define the critical criteria; and define how the scoring will be done so that the assessment showing gradings can be drawn out.

This method has been chosen as the mainstay of the study. The parameters selected as technical indicators have already been detailed earlier in this write-up.

B. Surveys: Survey of the consumers to assess their perception and feedback. This is limited by the sample size but will definitely provide an indication. All the criteria / parameters to be assessed based on the Consumer Survey are listed. This is reviewed and validated by the Expert Advisory Committee (EAC). This survey is run by the professional market research agency selected by **CONCERT**

This method has also been brought into this exercise to bring the customer who is an integral constituent in the total picture of the Tour Operator scenario. This could prove to be a useful adjunct to the evaluative study of the Tour Operator using the **Desk Test** method, by providing the customer angle of how they look at their service.

The survey will cover the four southern states of Tamilnadu (including Puducherry), Andhra, Karnataka, and Kerala. Care has been taken to ensure that there is a fair spread between the metros, urban, semi-urban and rural areas in these four states.

Primary Research

Tour Operator & Travel Agents

Extensive primary research was carried out to arrive at the above by way of understanding the following parameters of target countries; the competitiveness of tourism sector was evaluated by the macro parameters shown in the following table. These macro parameters in some cases were broken down into micro parameters.

Infrastructure

- Accommodation facility
- Restaurants
- Airport
- Mode of Transport
- Transport facilities

Taxes

- Entertainment Tax
- Service tax
- Luxury Tax
- Custom Duty
- Any other taxes related to Tourism

Visa

- Visa on arrival
- Online Visa

Parameters were analyzed on the basis of available information through different sources (collect pamphlet, website) etc.

Singapore was considered as outbound destination for the purpose of this report.

Tourism in Singapore

Singapore a modern city-state comprising of 63 islands is located at the southern tip of the Malay Peninsula. Tourism industry has undergone vast changes in the last decade. Tourist arrival has increased in Singapore to about 49 percent since 2009 with 11.6 million in 2010. Singapore also showed a remarkable performance at recent World Economic Forum's Travel and Tourism Competitiveness Index 2011 by topping in Asia Pacific and acquiring 10th place among 130 countries. Singapore Tourism Board also uncovered the new mobile technology App. Your Singapore Mobile Guide that would facilitate and help travellers wishing to visit Singapore.

Singapore presents itself as a medical hub and education hub. Major attractions in Singapore are centered on leisure and luxury travel. Island resorts, shopping, nature sight-seeing, dining and night life attract

tourists for their easy accessibility. Singapore Tourism Board promotes a variety of events all year round for tourists. Some of the anchor events are the Chingay Parade, Singapore Arts Festival and Singapore Garden Festival. Other annual events include the Singapore Sun Festival, the Singapore Food Festival held every July to celebrate Singapore's cuisine, the Christmas Light up, the Singapore Jewel Festival, etc. The Singapore government preserves the traditional quays alongside Singapore River restoring old warehouses and shop houses, converting them into pubs, restaurants and lounge bars.

To compete with its Asian rival cities such as Hong Kong, Tokyo and Shanghai, the Urban

Redevelopment Authority of Singapore plans to transform the city in to a more vibrant and exciting place with more buzz by lighting up the city completely. This would make Singapore livelier and help to create a captivating night scene to increase Singapore's appeal and high ranking status in the world.

Reasons for rise of tourists in Singapore are its shopping, island resorts, nature sight-seeing, night life and various events and festivals make Singapore a popular destination. Singapore's advanced and modern systems as well as its emphasis on leisure and luxury travel make it an

attractive destination for travelers with less time. A strong marketing campaign unlike India's makes it a favored tourist destination.

Comparative analysis of out bound tour operators, Destination competitiveness of India and Singapore

Analysis of Data Collected from Tour Operators

We identified major tour operators Thomas cook, Cox & Kings, Kuoni (SOTC), Akshaya & sree travel. They are oldest tour operators and largest integrated travel service company in the country, offering a wide spectrum of services that includes and not limited to Corporate Travel, Leisure Travel, and Insurance.

They pride themselves as being honest with transparent deals, costs and no compromise on sightseeing. They have a series of escorted group tours to all places, depending on customer needs.

Infrastructure

➤ Accommodation facility

All the tour operators provide accommodation facility for customer preference. Most of the customers preferred accommodation on twin sharing rooms in three star category hotels. Some tour operators provide the list of hotels for accommodation from which the customer can choose

according to their preference. The rate will vary from 3 star hotels to 4 star hotels. Any additional hotel expenses incurred personally like, Laundry, phone charges, beverages, water bottles & other charges. Accommodation for twin sharing has also been provided.

➤ Restaurants

Most of the tour operators provide breakfast for their tour fare. Some of them provide fixed menu vegetarian & non-vegetarian food including breakfast, Lunch and dinner at fixed hotels. All the tour operators not include Lunch & Dinner in the tour fare, Customer has to pay their food.

➤ Air Fare/Tax

Tour operators provide the list of flights & fare for customer preference. They can choose timing & fare as per their convenience. Most of the travelers prefer to travel economy class for their tour program. Customer has to pay any increase in the airfare charged by the airlines on air ticket. The airline ticket fare quoted is applicable as of date and will change for date of arrival. Once the flight tickets are booked, it is not possible to cancel the trip according to the airline policies, but it is possible to change the dates either with preponement or postponement with the prescribed charges applicable according to the airline policies. Departure tax at

airports if not mentioned in the tour price will have to be paid by the travelers.

➤ Transport facilities

Tour operators provided Airport transfer on a seat in coach basis. Some tour operators on a Private basis of deluxe category option. Sightseeing as mentioned in the itinerary is on a seat in coach basis, for group booking tour operator provide separate vehicle. Guide facility based on the customer preference, cost to be paid by the customer.

TOUR OPERATORS PERCEPTION ON TOURISM IN INDIA

Tourism Policy: India's tourism policy, according to tour operators, is not very definite. The state of tourism in India, despite there being huge potential, is not growing at the rate as in other countries like Thailand, Malaysia and Indonesia. The primary reason being that tourism sector in the referred countries is very organized. The policies are clear drafted; hence all the stakeholders in the sector operate complimenting each other. The scenario in India is totally opposite. All the stake holders in the sectors work according to their own policies and even the promotional campaigns and marketing modalities are separate for private players and Government administration.

A comparative statement of various tour programs offered by different operators is provided for customer preference.

S. No	Tour Operator	Duration of Tours	Accommodation	Restaurant	Cost per person	Tax	Transport
1	Cox & Kings	5Days /4 Nights	3 Star Hotel	Ibis Singapore Novena	Rs 54152.00	Govt. Service Tax 3.09%	SIC (Seat in Coach) basis
2	Akshaya India	5Days /4 Nights	3 Star Hotel	Hotel Cultural	Rs 56500.00	Govt. Service Tax 3.09%	Not Mentioned
3	SOTC	5Days /4 Nights	3 Star Hotel	Fragrance selegie	Rs 38500	Govt. Service Tax 3.09%	SIC (Seat in Coach) basis
4	Thomas Cook	5Days /4 Nights	3 Star Hotel	Hotel Cultural	Rs 23530.00	Govt. Service Tax 3.09%	SIC (Seat in Coach) basis
5	Fulcrum	5Days /4 Nights	3 Star Hotel	Hotel Cultural	Rs 40000.00	Not Mentioned	SIC (Seat in Coach) basis or Private
6	SREE Travels*	6Days /5 Nights	3 Star Hotel	Hotel Fortuna	Rs 46000.00	Not Mentioned	Not Mentioned

A comparative statement of facilities offered by different tour operators

S. No	Visa	Insurance	Guide	Advance payment	Cancellation policy	Itinerary	Document
1	Price Not Mentioned	Mentioned (Price Not available)	Not Mentioned	Yes	Available	Provided	Not mentioned
2	Price Not Mentioned	Mentioned (Price Not available)	Not Mentioned	Yes	Available	Provided	Not mentioned
3	Rs 2300.00	Mentioned (Price Not available)	Not Mentioned	Yes	Available	Provided	Not mentioned
4	Price Not Mentioned	Mentioned (Price Not available)	Not Mentioned	Yes	Available	Provided	Not mentioned
5	Rs 2200.00	Mentioned (Price Not available)	Not Mentioned	Yes	Available	Provided	Not mentioned
6	Price Not Mentioned	Mentioned (Price Not available)	Available	Yes	Available	Provided	mentioned

Survey (Research Methodology)

A quantitative study was conducted. **Face to face interviews with a structured questionnaire was conducted across cities.**

The study was conducted in 4 cities of South India – Chennai, Hyderabad, Bangalore and Kochi.

The sample sizes in different cities were as follows:

Cities	Sample sizes
Chennai	75
Hyderabad	75
Bangalore	76
Kochi	75
Total	301

The target group for the survey was SEC A and B. The respondents chosen were those who have availed of services of international tour operators to abroad on a holiday

Places visited

Singapore, US, Dubai, Malaysia, Thailand and Sri Lanka are the top 6 countries visited by respondents.

City wise there were wide variation. While 65% Chennai tourists patronized

Singapore, 63% Hyderabad tourists went to US. 32% and 24% of Kochi tourists went to Dubai and Singapore. But Bangalore tourists went to all the top 6 cities – Singapore 25%, US 16%, Dubai 13%, Malaysia 20%, Thailand 16% and Sri Lanka 12%.

Factors that determine choice of tourist operators

Factors	All	Chennai	Hyderabad	Bangalore	Kochi
Tour cost	70	63	64	67	85
No. of places they take you to visit	66	77	55	74	59
Discount and promotional offers	61	53	51	37	61
No. of tour days	60	55	31	54	59
Standard of hotels	43	65	35	29	41
Brand name of tour company	38	51	40	37	25
Mode of internal transport	29	48	25	24	19
Travel dates	29	11	44	28	32

The top four factors are tour cost, no. of places to visit, discount and promotional offers and no. of tour days. But there are variations city wise in these. Chennai tourists value no. of places to visit and standard of hotels more, while Hyderabad values tour cost and no of places to visit. Bangalore values no. of places to visit more and then the tour cost. Kochi values tour cost and promotional offers more.

Medical Insurance

Medical insurance have been taken

by 52% of all tourists contacted. But when we analyze city wise, in Chennai only 25% have taken medical insurance. In Bangalore and Kochi, 58% and 56% have taken medical insurance. In Hyderabad a whopping 73% have taken medical insurance.

In terms of life stage of respondents, 68% of students, 60% of couples, 46% of family with children 50% of senior citizens and 31% of single tourists have taken medical insurance for their travel.

Only 8% had a medical emergency during travel. Of the 22 tourists requiring medical help 91% could avail of medical insurance

requiring medical emergency was also less than 45 years.

In terms of segments, tourists among senior citizens did not have any medical emergency. 18% of students and 14% of couples and 4% of family with children had medical emergency during travel. Thus age of respondents

Of the people requiring medical emergency (among those who had medical insurance) 100% of couples and family with children could utilize medical emergency while only 71% of students could use the insurance services for medical emergency

Satisfaction with service providers – Is the tour worth the price?

	ALL	Chennai	Bangalore	Hyderabad	Kochi
Extremely Dissatisfied				1	
Dissatisfied	1			1	1
Neutral	1			3	
Satisfied	61	1	97	81	65
Extremely Satisfied	37	99	3	13	33
Base (no of respondents)	301	75	76	75	75
Mean score	4.3	5	4	4	4.3

Chennai tourists are very satisfied compared to others. Satisfaction of other cities also are quite high at an average of 4 points and above on a 5-point scale.



Evaluation for airline service – brand wise

Param-eters	Akbar Travels	Thomas Cook	Parveen Travels	Cox & Kings	SOTC	Riya group	Southern travels	Sadaran Travels	Heena Travels	Avion Holidays	Love My tour	Kesari	Madhura Travels	Galaxy travel holidays	Classic Holidays
1	100	96	100	93	100	100	100	100	78	67	100	88	100	100	100
2	94	89	100	97	94	100	100	91	67	78	67	63	100	100	83
3	90	89	100	93	88	93	100	91	56	67	78	75	100	100	83
4	87	89	100	80	94	100	100	45	78	67	44	88	100	17	100
5	85	85	100	87	76	100	100	100	67	78	100	75	100	17	83
6	82	74	100	87	88	93	100	82	56	100	100	63	100	100	100
7	72	85	100	80	76	87	100	100	78	89	100	100	100	83	100
Base	71	46	33	30	13	15	11	11	9	9	9	8	8	6	6

Parameter descriptions are given below.

1. There was a representative at the Airport to guide us regarding the flight
2. Flight bookings were done by tour operator
3. VISA formalities were done beforehand
4. Food offered in the flight was good

5. Flights were chosen as per our convenience & preference
 6. There was a representative at the Airport to receive us
 7. Chauffeur driven car was available at the destination Airport to receive us
- The client's satisfaction was ascertained on a 5-point scale. Here top 2 box scores – highly satisfied and satisfied - are clubbed here.

It is observed that Parveen Travels, Southern Travels and Madura Travels have secured 100% top 2 box scores for all parameters

In the top 4 brands where we had minimum 30 tourists, the satisfaction on all parameters was over 70% for all 4 brands.

Evaluation of sightseeing – brand wise

Param-eters	Akbar Travels	Thomas Cook	Parveen Travels	Cox & Kings	SOTC	Riya group	Southern travels	Sadaran Travels	Heena Travels	Avion Holidays	Love My tour	Kesari	Madhura Travels	Galaxy travel holidays	Classic Holidays
1	99	87	100	93	76	93	100	100	89	100	78	88	100	100	100
2	99	93	100	90	100	100	100	91	100	56	67	100	100	100	83
3	97	91	100	93	82	100	100	91	89	78	78	38	100	100	100
4	97	89	100	83	82	93	100	100	78	78	78	100	100	100	83
5	96	85	100	100	88	100	100	91	78	56	78	100	100	100	100
6	94	78	100	83	47	93	100	82	56	67	78	100	100	100	67
7	93	93	100	83	100	93	91	91	78	89	67	88	100	83	83
8	93	85	100	87	47	93	100	64	44	78	44	38	100	100	100
9	92	89	100	93	100	100	100	100	67	89	100	75	100	17	100
10	92	89	100	83	94	100	100	100	89	89	100	100	100	100	100
11	92	91	100	90	71	93	100	100	100	78	78	100	100	100	100
Base	71	46	33	30	13	15	11	11	9	9	9	8	8	6	6

Parameter descriptions are given below.

- | | | |
|--|--|--|
| <ol style="list-style-type: none"> 1. Comfort in the Transport provided during sightseeing 2. Itinerary covers most prominent places 3. Internal transportation service | <ol style="list-style-type: none"> 4. Special requests were met 5. Knowledge of tourist guide about the place 6. Time given to undertake private outings for shopping, for meeting relative/friend etc. 7. Ability of tourist guide to deal with | <ol style="list-style-type: none"> unforeseen circumstances 8. Accommodation of additional sight seeing 9. Coverage of major tourist attractions of the place 10. Overall conduct of the tourist guide 11. Punctuality during sightseeing |
|--|--|--|

The satisfaction was ascertained on a 5-point scale. Here top 2 box scores – highly satisfied and satisfied - are clubbed here.

It is observed that Parveen travels and Madura travels have secured 100% top 2 box scores for all parameters

In the top 4 brands where we have minimum 30 tourists, the satisfaction on all parameters is over 80% for 4 all brands.

Evaluation of customer service – brand wise

Parameters	Alkar Travels	Thomas Cook	Parveen Travels	Cox & Kings	SOTC	Riya group	Southern travels	Sadaran Travels	Heena Travels	Avion Holidays	Love My tour	Kesari	Madhura Travels	Galaxy travel holidays	Classic Holidays
1	97	85	100	83	71	100	100	91	78	56	78	88	100	100	100
2	96	96	100	93	100	100	100	100	100	78	78	100	100	17	100
3	94	96	100	93	94	100	100	100	89	100	100	88	100	100	100
4	94	96	100	83	94	93	100	91	100	33	78	100	100	17	100
5	94	76	100	87	71	100	100	91	67	89	89	100	100	100	100
6	94	87	100	90	88	100	91	100	67	89	100	88	100	100	100
7	90	89	100	93	71	100	100	100	78	100	78	88	100	100	100
Base	71	46	33	30	13	15	11	11	9	9	9	8	8	6	83

Parameter descriptions are given below.

1. Special request on food are accommodated
2. Details of the destinations are provided
3. Briefing on departure & meetings are held on time
4. Wake up calls & reminders are

provided

5. There is Flexibility in the itinerary
6. Assistance is provided on Extend stay
7. Guidance provided on free days / leisure day

The satisfaction was ascertained on a 5-point scale. Here top 2 box scores – highly satisfied and satisfied - are

It is observed that Parveen travels and Madura travels have secured 100% top 2 box scores for all parameters

In the top 4 brands where we have minimum 30 tourists, the satisfaction on all parameters is over 80% for 4 all brands.

Brand Association

Parameters	Thomas Cook	Cox & Kings	Albar Travels	Parveen travels	SOTC	Kesari	Heena Travels	Gem Travels	Riya Group	Southern travels	Classic Holidays
This tour operator has good reputation in the market	35	27	41	11	9	4	12	9	5	13	7
This tour operator has optional places to visit during your existing tour	35	19	36	11	10	5	9	6	3	11	6
This tour operator is extremely customer friendly	34	22	37	11	11	6	7	7	3	9	10
The tour managers are extremely friendly and accommodating	33	16	35	11	8	4	8	4	3	11	7
The fellow tourists during the tours of this operator are friendly	29	17	41	11	9	5	9	7	4	10	7
They have packages customized to your needs	29	17	36	11	12	6	9	8	3	10	9
This tour operator has the best itinerary of the location	28	18	38	11	9	7	9	7	3	13	8
The punctuality of staff & tour manager is commendable	27	19	40	10	9	3	9	6	3	10	7
Luxurious tour operator	27	20	36	11	7	4	8	8	3	8	7
The price at which this tour operator provides the service is value for money	26	22	36	11	11	7	9	10	2	11	7
They provide appropriate accommodation to customers	26	18	37	11	9	4	7	10	5	12	2
This tour operator provides Indian food during the tour	26	21	35	11	7	7	6	6	3	11	3
Most enjoyable experiences during the tours organized by this tour operator	24	19	39	11	8	7	8	6	2	12	2

Here tourists are asked to associate on each parameter brand names as per their perception

The top three brands in this are Akbar travels, Thomas Cook and Cox & Kings. As their awareness is high the association levels also increases.

Summary of findings

- Places visited - Singapore, USA, Dubai, Malaysia & Thailand were the top destinations visited by respondents. Kochi respondents preferred Dubai whereas Hyderabad preferred USA & Chennai ones preferred Singapore.
- Drivers of brand preference - Cost is the predominant driver for brand preference followed by tour itinerary & promotional offers
- Medical Insurance - 52% of respondent availed medical insurance for travel. 8% of all respondents faced a medical emergency during the tour. And majority could avail of medical insurance during travel
- Brand awareness - Akbar Travels, Thomas cook, Cox & Kings have very high awareness levels. Gem & Heena travels, despite having higher awareness, were not able to convert the scores into consideration scores
- Brand consideration and services availing - Apart from Akbar Travels, Thomas cook, Cox & Kings there were brands like southern travels, Riya, Parveen Travels & Classic holiday who have managed to garner consideration scores
- Specific likes - Timeliness, Food Quality & Customer services were the likes.
- Tour operator evaluation - Respondents were satisfied with almost all the aspects of their tour operator. Satisfaction was high in Chennai & Kochi followed by Bangalore & then finally Hyderabad.
- Tour operator evaluation - parameters - Food & Accommodation & Sight Seeing are the parameters where scores dip & Improvement can be made in certain cities like Hyderabad & by certain tour operators like Thomas cook, Cox & Kings.
- Brand perception - Akbar & Southern travels are perceived to be enjoyable. Cox and Kings as luxurious and Thomas cook as reputed.

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