

Tourism Satellite Account, 2018–19, Uttarakhand

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Tourism Satellite Account, 2018-19 Uttarakhand

For

Directorate of Economics and Statistics, Government of Uttarakhand

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Preface

It is a great pleasure to note that Uttarakhand Directorate of Economics and Statistics is releasing the report on Tourism Satellite Account for 2018-19. under the Support for Statistical Strengthening Project. The report is first of its kind in the sense that it takes into account all the state-specific tourism characteristics in the derivation of the comprehensive TSA Tables and Accounts. I am sure that the state tourism sector's policy makers will benefit from the findings of this report, is not just framing the future policies but also showcasing the importance of tourism in the state economy.

I take this opportunity to thank the study team of the National Council of Applied Economic Research (NCAER) for undertaking this study and for preparing the sub-national TSA by adopting the methodology which largely conforms to the one recommended by the United Nations World Tourism Organisation (UNWTO) for the preparation of national TSAs.

I appreciate the efforts of DES Officers particularly Shri Sushil Kumar, Director DES and Dr. Manoj Kumar Pant, Additional Director/Nodal Officer SSS initiating this study. I congratulate the whole team of DES and NCAER for their efforts to complete the study during covid-19 period.


(Manisha Panwar)

Poonam Gupta
Director General

Foreword

The State of Uttarakhand, aptly known as the 'land of the Gods', is one of the most popular destinations in India for religious and spiritual tourists. A large number of domestic and international travellers visit the State's famous Hindu temples, pilgrimage centres, and other historic holy places, throughout the year. People of the Hindu faith believe that a once-in-a-lifetime visit to the holy circuit of four pilgrimage sites in the Garhwal region of Uttarakhand—Yamunotri, Gangotri, Kedarnath and Badrinath—popularly known as *Chhota Char dhams*, can help them achieve salvation. Apart from its religious sites, the State also offers a multitude of other tourism themes, being naturally blessed as it is, with scenic locations, mountains, origins of rivers, and a pleasant climate.

Tourism is thus clearly an important activity in Uttarakhand in view of its immense contribution to both revenue generation as well as employment creation in the State. It is in this context that the present study, undertaken by the National Council of Applied Economic Research (NCAER) to prepare a Tourism Satellite Account (TSA) for quantifying the economic value of tourism in terms of the Gross Value Added (GVA) it generates and the number of jobs it creates in the State, assumes great significance. Based on the methodology delineated by the United Nations World Tourism Organisation (UNWTO) in its publication called "Tourism Satellite Account: Recommended Methodological Framework, 2008 (TSA: RMF 2008)", this study adopts the internationally adopted framework of TSA tables and accounts to arrive at the economic value of tourism, at the sub-national level, for Uttarakhand. This value is referred to as the direct share of tourism to the economy. In addition, this study estimates the indirect share of tourism, which results from its linkages with other sectors of the economy.

I take this opportunity to thank Mr. Dilip Jawalkar, Secretary, Tourism & Chief Executive Officer, Uttarakhand Tourism Development Board, Government of Uttarakhand and Ms. Manisha Panwar, Additional Chief Secretary, Department of Planning, Government of Uttarakhand for initiating this important study. In the same vein, I express my gratitude to Mr. Sushil Kumar, Director, Department of Planning and Dr Manoj Pant, Additional Chief Executive Officer, Department of Planning, Government of Uttarakhand, for the valuable insights and constant cooperation he offered the NCAER team through the course of the study. The study team is also particularly grateful to Dr Dinesh Badoni, Tourism Department, Directorate of Economics and Statistics, Government of Uttarakhand for his useful comments and suggestions.

I also express my gratitude to all the members of the NCAER study team, including Dr Poonam Munjal, Team Leader; Dr Nijara Deka, Associate Fellow; Dr Palash Baruah and Mr Asrar Alam, Senior Research Analysts; and Ms Sundus Usmani, Research Analyst, for their efforts in completing the study amidst the challenge of the pandemic in the country, which has not only resulted in lockdowns and travel restrictions but also posed health issues for some of the team members and their families. I hope that the study will prove to be a useful contribution to the literature on tourism for the State of Uttarakhand, in particular, and the country, as a whole.

**New Delhi**
September, 2021**Dr Poonam Gupta**
Director General, NCAER

Table of Contents

Study Team	1
Foreword	Error! Bookmark not defined.
List of Tables	vi
List of TSA Tables	vi
List of Figures	vii
Executive Summary	viii
 I. Introduction	 1
I.1. Background	1
I.2. Tourism Satellite Account	2
I.3. Regional Tourism Satellite Account	3
I.4. Objectives of the Study	4
I.5. Approach of the Study	4
I.6. Structure of the Report	6
 II. Devabhumi: The State at a Glance	 7
II.1. Geography of the State	7
II.2. Demographic Profile of the State	8
II.3. Employment Data for the State	10
II.4. Economic Profile of the State	11
II.5. Infrastructure Profile of the State	12
 III. State Tourism Profile	 13
III.1. State Tourism Policy, 2018	15
III.2. State Tourism Characteristics	17
➤ Purposes of Trips	20
➤ Distribution by Age	21
➤ Modes of Transport	22
➤ Main Destination	23
➤ Leading Tourism Purposes by Districts	24
➤ Trips from Other States	24
 IV. Methodology	 27
IV.1. Data Sources	29
IV.2. Inbound Tourism Expenditure	30
IV.3. Inbound Tourism Expenditure Incurred by Tourists Arriving from Other States	34
IV.4. Domestic Tourism Expenditure	40
IV.5. Outbound Pre-trip Tourism Expenditure	43
IV.6. Total Internal Tourism Consumption	46
➤ Imputed consumption on services associated with vacation homes on own account:	47
➤ Imputed consumption towards tourism social transfers in kind (except refunds).	47
➤ Imputed value of financial intermediation services (FISIM) availed by visitors	47
➤ Imputed costs for producers (businesses, governments and NPISHs) on expenditures by employees on business trips	48
➤ Imputed costs for hosts of receiving visitors in terms of expenditure on food, utilities, invitations, and presents, among others, or the net costs of hosts.	48

IV.7. Production Accounts of Tourism Industries	52
IV.8. Tourism Industry Ratios and TDGVA	63
IV.9. Tourism Employment.....	75
IV.10. Indirect Contribution of Tourism	77
V. Summary of Findings	79
Appendix A1	83
Glossary	84
.....	100

List of Tables

Table III.1: New Tourism Products	16
Table III.2: Per 1000 Distribution of Overnight Visitor Trips Completed during last 30 Days and 365 Days by Purpose of the Trip for Male and Female Tourists	21
Table IV.1: Standard TSA Tables	27
Table IV.2: Products Recommended in TSA: RMF 2008 versus Products Included in State TSA, 2018-19	29
Table IV.3: Consumption Expenditure Adjustment Factors	36
Table IV.4: Total Internal Tourism Consumption by Forms of Tourism (% Distribution).....	50
Table IV.5: Internal Tourism Consumption by Items of Consumption (% Distribution)	51
Table IV.6: Economic Aggregates of Industries	62
Table IV.7: Total Supply, Tourism Consumption and TDGVA.....	74
Table IV.8: Values of Multipliers	78
Table A.1: Item-wise Rate of Inflation (2018-19 over 2015-16)	83

List of TSA Tables

TSA Table 1A: Inbound Tourism Expenditure Incurred by International Tourists	32
TSA Table 1B: Inbound Tourism Expenditure Incurred by Tourists from Other States by Products and by Leading Purposes.....	38
TSA Table 2: Domestic Tourism Expenditure Incurred by Tourists from within the State.....	41
TSA Table 3: Pre-trip Outbound Tourism Expenditure Incurred by Tourists Travelling Abroad	44
TSA Table 4: Total Internal Tourism Consumption	49
TSA Table 5: Production Account of Tourism Industries - Supply Table - 2018-19.....	53
TSA Table 6: Domestic Supply and Internal Tourism Consumption (Rs Lakh).....	64
TSA Table 7: Tourism Direct Employment by Work Status.....	77

List of Figures

Figure II.1: Map of Uttarakhand.....	7
Figure II.2: Distribution of Population by Broad Age Category and Gender (%).....	8
Figure II.3: Population Pyramid (%).....	9
Figure II.4: Distribution of Population by Broad Social Group and Religion (%).....	9
Figure II.5: Labour Force Participation Rate (LFPR) by Region and Gender	10
Figure II.6: Unemployment Rate (UR) by Region and Gender	11
Figure II.7: Growth in the Gross State Domestic Product (Constant Prices).....	12
Figure III.1: Total Domestic Tourist Arrivals (in crore)	13
Figure III.2: Foreign Tourist Arrivals (in absolute numbers) by districts, arranged in decreasing order for the year 2018	18
Figure III.3: Domestic Tourist Arrivals (in absolute numbers) by districts, arranged in decreasing order for the year 2018	18
Figure III.4: Distribution of Parameters by Rural/Urban Areas	20
Figure III.5: Percentage Distribution of Visitors by Age Groups across Visitors' Purposes	22
Figure III.6: Distribution by Modes of Transport	23
Figure III.7: Distribution of Trips by Main Destination.....	23
Figure III.8: Distribution of Trips with Different Purposes by Districts.....	24
Figure III.9: Top Five States from Where Trips Are Undertaken in Uttarakhand for Different Purposes (percent distribution)	25
Figure IV.1: Percent Distribution of International Inbound Tourists	33
Figure IV.2: Average Per-tourist Expenditure (Rs.) Incurred by International Tourists in Uttarakhand	33
Figure IV.3: Percentage Distribution of International Inbound Tourism Expenditure (Incurred by International Tourists) by Products and Services.....	34
Figure IV.4: Percentage Distribution of Inbound Tourists from Other States to the State of Reference by Leading Purposes of Travel	39
Figure IV.5: Average Per-tourist Expenditure (Rs) Incurred by Tourists from Other States to the State of Reference.....	39
Figure IV.6: Percentage Distribution of Inbound Tourism Expenditure (Incurred by Tourists from Other States) by Products and Services	40
Figure IV.7: Percentage Distribution of Domestic Tourists by Leading Purposes of Travel.....	42
Figure IV.8: Average Per-tourist Expenditure (Rs) Incurred by Tourists from within the State of Uttarakhand	42
Figure IV.9: Percentage Distribution Of Domestic Tourism Expenditure (Incurred by Tourists from within the State) by Products and Services	43
Figure IV.10: Percentage Distribution of Outbound Tourists by Leading Purposes of Travel	45
Figure IV.11: Average Per-tourist Expenditure (Rs.) Incurred by Outbound Tourists in Uttarakhand	45
Figure IV.12: Percentage Distribution of Outbound Tourism Expenditure by Products and Services	46
Figure IV.13: Shares of TDGVA and GVA of Other Service Industries in the Total State Economy	75
Figure V.1: Shares of Tourism in GVA and Employment of the State	81

Executive Summary

I. Introduction

The Tourism Satellite Account (TSA) is the accounting framework recommended by the United Nations World Travel Organisation (UNWTO) for compiling the relevant tourism statistics and integrating these statistics with the System of National Accounts. This framework also presents the linkages between the demand and supply for goods and services in respect of tourism.

In the state of Uttarakhand, which is a popular tourist destination due to its scenic locations, pleasant climatic conditions, lakes, snow-capped mountain peaks, glaciers and origins of rivers, tourism generates a significant contribution to the State's economy. According to the latest estimates of number of tourists in tourist destinations, there were a total of about 3.7 crore domestic tourist arrivals in the State in 2018. This is almost three times the number of arrivals in 2002, which stood at 1.2 crore. Hence, in order to facilitate better understanding on the quantification of the economic value of tourism, in absolute terms and also in terms of its share in the State's GDP and employment, the TSA for the State has been prepared for 2018-19, under the study undertaken by the National Council of Applied Economic Research.

This report presents a brief profile of the State covering different aspects of its geography, demography, employment, economy, infrastructure, and tourism. This is followed by the detailed methodological framework that was adopted to prepare the TSA for the State, along with the set of TSA tables and accounts, conforming to the recommended framework of the United Nations World Tourism Organization (UNWTO).

II. State Profile

The state of Uttarakhand is divided into two divisions, Kumaon and Garhwal, with a total of 13 districts. The provisional capital of Uttarakhand is Dehradun. The population, as per Census 2011, is 100.86 lakh, of which 70 per cent of the people reside in rural areas. About two-thirds of the population belongs to the working age group of 15 to 64 years. According to the Periodic Labour Force Survey (PLFS), conducted by the National Sample Survey for 2017-18, the labour force participation rate for those aged 15 years and above stood at 69.1 per cent for males and 20.3 per cent for females in the rural areas. The corresponding figures were 71.3 per cent for males and 12.3 per cent for females in the urban areas.

The State's economic growth, in terms of the year-on-year growth in the Gross State Domestic Product (GSDP) is recorded at 6.9 per cent for 2018-19, which is a deceleration from the growth of 9.8 per cent and 7.8 per cent in 2016-17 and 2017-18, respectively. Of the three major sectors, industry accounted for about 45.9 per cent in 2018-19, remaining at about the same share value since the base year of 2011-12. Another 46.2 per cent was on account of the services sector while the remaining 7.9 per cent was contributed by the agriculture and allied sector.

The total road length of the State is 69,777 km, of which the surfaced road length is 52,140 km. Despite a tough terrain and natural disasters, the State enjoys connectivity with all the major places in the State. Uttarakhand has two domestic airports, one at Jolly Grant in Dehradun district and another at Pant Nagar in Udham Singh Nagar district.

As regards tourism, the State plans to expand the sector by adding some niche themes, like water sports, eco-tourism, heli-skiing, and spiritual yoga tourism, as envisaged in the new Tourism Policy 2018. The new Tourism Policy focuses on sustainable development, innovative tourism products, concepts, and destinations for tourists while also allowing the State to fulfil its goal of moving towards a greener economy.

Some of the key-tourism related characteristics of the State are as follows:

- From 2008 to 2017, Dehradun was the most popular destination for foreign tourists, but Tehri overtook Dehradun in 2018, to become the most visited district in the State.
- Haridwar is the most popular destination among domestic tourists, accounting for 58.7 per cent of total. This is followed by Dehradun, at 16 per cent.
- As per the Domestic Tourism Survey, conducted by the National Statistics Office in 2014-15, the total number of overnight visitors was estimated to be 31.4 lakh.
- A majority of the trips, that is, around 80 per cent, were undertaken for social purposes.
- Travel by bus is the most preferred mode of transport, followed by own and hired transport.
- In the case of a majority of the trips originating from the State of Uttarakhand, the destination of the tourists lies within the State.
- As regards trips by leading purposes across the districts, Udham Singh Nagar, followed by Dehradun and Haridwar, account for the maximum number of holiday trips.
- Dehradun and Uttarkashi account for the most number of health-related trips, at 15.3 per cent and 13.9 per cent, respectively. Dehradun and Haridwar account for the highest number of religious trips.
- Most of the trips undertaken in the State, with all leading purposes taken together, originate from the northern States of India, like Uttar Pradesh, Delhi, Haryana, and Punjab.
- Holiday trips are undertaken from the tourists arriving from Uttar Pradesh, Delhi, Haryana, West Bengal, and Maharashtra. Most of the medical trips originate from Uttar Pradesh and West Bengal accounts for a majority of the business trips.

III. Methodology

According to the latest recommended framework published by the UNWTO, called “Tourism Satellite Account: Recommended Methodological Framework, 2008 (TSA: RMF 2008)”, the national-level TSA comprises a set of ten tables and is mainly descriptive in nature. However, for the sub-national level TSA, no such framework is available, though UNWTO does recognise the importance of preparing the TSAs at the State or sub-national levels.

It discusses two main types of approaches followed to prepare the regional TSAs – the Regionalisation or Top-bottom Approach and Regional Estimation or Bottom-up Approach. For India, based on the data availability and feasibility of these approaches, the TSA at the State level can be prepared by using the Regionalisation Approach but by refining it further by using the State tourism and other consumption characteristics.

Each TSA table presents the tourism-related information for a set of goods and services, identified as tourism-specific products, which are further classified into tourism-characteristic goods, which would cease to exist in meaningful quantity, in the absence of tourism; and tourism-connected goods, which are consumed by visitors but are not considered as tourism-characteristic products.

The data sources used to prepare the State TSA tables include the Domestic Tourism Survey (DTS) – 2014-15; International Passenger Survey (IPS) – 2015-16; State GDP statements; State Supply and Use Table (SUT) – 2018-19; and Periodic Labour Force Survey (PLFS) – 2018-19.

The following TSA tables have been prepared for the State:

III.1. Inbound Tourism Expenditure

- This refers to the expenditure incurred by inbound tourists or tourists arriving from outside the geographical boundary of the State, that is, from abroad and from other States of the country.
- The expenditure incurred by international tourists is obtained from the IPS whereas that from other States is obtained from the DTS.
- The expenditure data were adjusted to account for the package component and for the amount paid or reimbursed by the government or others.
- In order to arrive at the tourism expenditure for the TSA reference year 2018-19, the per-tourist expenditure by the types of tourists obtained from the survey data were applied on the actual number of tourist arrivals in the State. The price change between 2015-16 (the IPS reference year) and 2018-19 has also been accounted for.
- It is estimated that about 93,251 international tourists travelled to Uttarakhand in 2018-19. Their average per tourist expenditure is estimated to be Rs 90,868.
- International tourists spent about 40.3 per cent on tourism-connected goods followed by 18.7 per cent on hotels for accommodation services.
- About 53.66 lakh trips were made to the State.
- Taking into account the expenditure made for various purposes to visit Uttarakhand, the average per trip expenditure is estimated to be Rs 15,150 by the tourists from the other States of India.
- While 40.2 per cent of this expenditure was incurred on transport services, 26.8 per cent was incurred on food and beverage providing services

III.2. Domestic Tourism Expenditure

- This refers to the expenditure incurred by tourists from within the State, that is, tourists living in the State of reference, travelling to another place within the same State of reference.
- The methodology used for estimation of expenditure is the same as that used for estimating the inbound tourism expenditure incurred by tourists from other States to the State of reference.
- It is estimated that during 2018-19, about 82.96 lakh trips were made to the State of Uttarakhand by domestic tourists from within the State.
- The average per trip expenditure is estimated to be Rs 7,230.
- While 42.8 per cent of the total expenditure was incurred on transport services, 29.6 per cent was incurred on tourism-connected products by domestic tourists in Uttarakhand.

III.3. Outbound Pre-trip Tourism Expenditure

- This refers to the expenditure incurred by resident visitors travelling outside the State, that is, to a foreign destination or State other than Uttarakhand. However, since the TSA covers all the expenditure incurred within the geographical boundary of the economy of reference, this table presents only the pre-trip expenditure incurred by outbound tourists, covering the expenses incurred in preparation of the outbound trip.
- A total of 37,831 residents of the State of Uttarakhand have been estimated to have travelled outside the country as outbound tourists during 2018-19. Of these, 44 per cent of the residents travelled abroad for holidaying while about 25 per cent of the residents travelled outside the country with business as their leading purpose.
- The average per trip and pre-trip outbound tourism expenditure is estimated at Rs 8,449.
- About 62.7 per cent of the total expenditure was incurred on tourism-connected products, which represent the items purchased in preparation of the trip.

III.4. Total Internal Tourism Expenditure

- This refers to the sum-total of the inbound, domestic, and outbound pre-trip tourism expenditure, presented in TSA Tables 1a, 1b, 2, and 3. In addition, the components of imputed consumption are given in separate rows.
- Since these components of imputed consumption are not directly available from any data source, they are derived using certain plausible assumptions. These components include services associated with vacation homes on own account; tourism social transfers in kind; financial intermediation services (FISIM) availed of by visitors; costs for producers (businesses, governments and NPISHs) on expenditures incurred by employees on business trips; and costs for hosts of the receiving visitors in terms of the expenditure on food, utilities, invitations, and presents, or the net costs of hosts.

- The total internal tourism expenditure for Uttarakhand is estimated at Rs 15007.56 crore for 2018-19. Of this, 5.6 per cent was incurred by international tourists. The value of imputed consumption is estimated at Rs 4820.24 crore. Taking together the internal tourism expenditure and imputed consumption, the value of the total internal tourism consumption stood at Rs 19827.80 crore for 2018-19.
- The tourism economy in the State is mainly driven by the tourism activities from within the country, whether undertaken in the State itself or from any other State. These account for over 95 per cent of the total internal tourism consumption in the State.
- Among the tourism-characteristic products and services, the major expenses were incurred on transport services, across all the four forms of tourism. Among the tourism-connected products, readymade garments were the most popular item of expenditure by all types of tourists.

III.5. Production Account of Tourism Industries

- This forms Table 5 of the State TSA. It conforms to the format established in the Systems of National Accounts (SNA) for production accounts.
- This is presented in SUT format, wherein products are shown in rows and industries in columns.
- This table shows that of the total GSVA of the state, at Rs 2,18,644 crore, the GVA accounted for by the tourism industries, that is GVATI, stood at Rs 17,520 crore in 2018-19, which amounts to 8.0 per cent of the total GSVA. However, not all the GVA of these industries are on account of tourism activity; part of it is also on account of non-tourism.
- The tourism component of these industries is derived through the TSA Table 6, which is the core of TSA.

III.6. Tourism Industry Ratios and TDGVA

- This table delineates the confrontation between domestic supply and internal tourism consumption. The total supply of goods and services in the economy by products, which includes domestic production and imports, is compared to the internal tourism consumption that is derived in TSA Table 4.
- The Tourism Product Ratios (TPR) are derived for each of the 24 product categories through a comparison of the demand-side and supply-side data.
- These TPRs, when applied to each industry column of the supply table, yield the Tourism Industry Ratios (TIRs) for each of the 24 industry categories. These ratios can be used to derive the estimates regarding the GVA attributable to tourism for each of the domestic industries that serve visitors, or the Tourism Direct GVA (TDGVA).
- This TDGVA for Uttarakhand is estimated at Rs 6472.5 crore, which translates into 2.96 per cent of the total GSVA. This is the direct share of tourism to the State GVA.

III.7. Tourism Employment

- According to the UNWTO recommendation, the entire employment in tourism-characteristic industries is referred to as the direct tourism employment.
- For TSAs for India and the States of India, the TSA Table 7 presents the total number of jobs (one employed person can take up more than one job, with the second being of a subsidiary nature).
- The number of jobs in tourism-characteristic industries in the State is estimated at 4.30 lakh in 2018-19. The total number of jobs in the State is 36.52 lakh. Hence, the direct share of tourism employment to the total employment works out to be 11.77 per cent.
- This share is 8.58 per cent in the case of the self-employed status of work and is much higher at 15.91 per cent in the case of employees, including both include casual workers and salaried or regular wage-earners.

III.8. Indirect Contribution of Tourism

- The indirect benefits of tourism result due to the inter-linkages of tourism-specific industries with other industries of the economy.
- The Input–Output (IO) model is used to quantify the indirect benefits. The model generates the output, GVA, and employment multipliers, which are the measures of the indirect benefits of a sector to the economy's output, GVA/GDP, and employment, respectively.
- The output multiplier works out to be 2.25, the GVA multiplier, 2.23, and the employment multiplier, 2.28.
- Consequently, the total share of tourism in the State GVA is estimated at 6.59 per cent and the total share in the number of jobs in the State is estimated at 26.87 per cent.

I. Introduction

I.1. Background

The tourism industry has grown from representing the pursuits to explore new horizons among a privileged few to a mass movement of people, with the “urge to discover the unknown, to explore new and strange places, to seek changes in the environment and to undergo new experiences” (Robinson 1976¹). In other words, it signifies the activities of people travelling to and staying in places outside their usual environment for leisure, business, or other purposes for not more than one consecutive year. Tourism is thus a social, cultural, and economic phenomenon for people wishing to spend some time away from their usual place of residence in the pursuit of recreation, relaxation, and pleasure, while making use of the commercial provision of services. Although recreation is the usual motive of tourism activities tourism is not restricted to merely recreation and also encompasses other motives like business, health, religious and educational travel, and in recent times, even shopping.

Being an ever-expanding service industry with a vast growth potential, tourism is a crucial sector not only at the national or sub-national levels but also at the international level. The word ‘tourism’ is also a generic term covering both demand and supply, and has been adopted in various forms and used throughout the world. From the definition of tourism and the fact that tourism is a temporary activity, it can be interpreted as a demand-based concept. However, the decision of a tourist to make a visit generates an additional demand for goods and services in that region, which are provided from the supply side of the market.

The UN World Tourism Organization (UNWTO) defines tourism as follows, which is now also the accepted official definition of ‘tourism’:

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

Recently, tourism has become a phenomenon, which has been increasing exponentially and establishing itself as an important economic sector. Tourist arrivals are growing substantially across the globe, creating a high demand for tourism related items/services and infrastructure. Owing to the rapid increase in tourism activities across the globe and the significantly high accrual of foreign exchange earnings from such activities, it has become a task of primary preference for nations to measure tourism statistics (both monetary and non-monetary). For a vast country like India, with each State exhibiting different economic dynamics and offering a variety of tourism destinations, the measurement of tourism statistics is of utmost importance at the State level too.

The UNWTO recommends putting the relevant tourism statistics in an accounting framework so as to integrate these statistics with the System of National Accounts and to show the linkages

¹ Robinson, H. (1976). “A geography of tourism”; Macdonald and Evans.

between the demand and supply of goods and services in respect of tourism. This accounting framework is called the *Tourism Satellite Account (TSA)*. The systems of tourism statistics and tourism satellite accounts are tools that aid in the understanding and accurate measurement of the role of tourism in the economy.²

1.2. Tourism Satellite Account

The satellite accounts maintain a fluid relationship with the SNA, with the boundaries expanded and re-classified as per requirement, and focus remaining on the purpose or function of transactions. Tourism Satellite Account (TSA) is a framework related to the “tourism industry”. By definition, it is a framework designed to measure goods and services associated with tourism, according to internationally agreed standards, concepts, classifications, and definitions. It helps in assessing the size and contribution of tourism to the economy.

TSA is an internationally accepted UNWTO definition of twelve standard industrial classifications of the sectors of the economy that provide the tourism-related products/services consumed by visitors. The turnover due to tourism in each of these sectors is measured in terms of the expenditure incurred by visitors, that is, from the demand side.

Furthermore, the TSA of UNWTO measures the linkage between the demand and supply of goods and services in respect of tourism by integrating the relevant tourism statistics with the System of National Accounts. It helps in assessing the size and contribution of tourism to the economy and is hence a powerful instrument for designing economic policies related to tourism. The important uses and applications of TSA are listed in Figure I.1.

Figure I.1 : Uses and Applications of the Tourism Satellite Account



Source: NCAER compilation

²Eurostat: European Implementation Manual on TSA

The TSA framework provided by UNWTO is the most comprehensive means of measuring the economic importance of tourism in national economies. According to the latest recommended framework published by UNWTO called ‘Tourism Satellite Account: Recommended Methodological Framework, 2008 (TSA: RMF 2008)’, TSA comprises a set of tables and is mainly descriptive in nature. It provides accounts and tables and macroeconomic aggregates, principal among them being the Gross Value Added of the Tourism Industry (GVATI), Tourism Direct Gross Value Added (TDGVA), and Tourism Direct Gross Domestic Product (TDGDP). The TSA also has the scope to link economic data with investments in tourism, employment in the tourism industry, and other non-monetary (quantitative) information and statistics related to tourism and tourists.

I.3. Regional Tourism Satellite Account

While the TSA: RMF 2008 framework is available for the preparation of a national level TSA, no such framework is available for preparing the regional or sub-national level TSAs. However, UNWTO does recognise the importance of preparing the TSAs at the State or sub-national levels. In many countries, the sub-national or regional TSAs (RTSA) are increasingly becoming popular. This development has also been recognised by UNWTO, as a result of which it has taken various initiatives to promote regional or sub-national TSAs.

According to TSA: RMF 2008, there is a need for a comprehensive discussion on how the Tourism Satellite Account can be adapted to sub-national levels for various reasons. Some of these reasons are:

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

In India, three national level TSAs have hitherto been prepared, with the first TSA being for the reference year 2002-03, the second for 2009-10, and the third TSA for 2015-16. As regards the State-level RTSAs, the data for 2009-10 were used for making the first attempt to prepare the TSAs for all the States of India for the same year. The second round of RTSA has recently been prepared for the reference year 2015-16 for all the States and UTs of India.

However, in order to arrive at more updated information on tourism statistics, the Government of Uttarakhand has decided to prepare its TSA for 2018-19, while also capturing the tourism profile of the various districts in the State to the maximum extent possible.

I.4. Objectives of the Study

The broad objectives of this study are to prepare the TSA for Uttarakhand for the year 2018-19, and to develop the capacity of the Directorate of Economics and Statistics (DES), Government of Uttarakhand for preparation of the State's TSA. Following is a delineation of the scope of this work:

- The TSA of the State for the year 2018-19 has to be prepared, with the following chapterisation:
 - Introduction
 - Profile of the State;
 - Data Sources and Key Findings;
 - Methodology Adopted for the State TSA Tables;
 - TSA Tables and Accounts;
 - Summary of Findings—All estimates/tables to have district-level estimates subject to limitations of data availability; and
 - Training of DES Officials.

I.5. Approach of the Study

The UNWTO suggests the use of two distinct approaches for preparing the regional TSAs (RTSAs). Similar approaches are used for preparing the regional Supply and Use Tables (SUT) also, if direct data are not available. These approaches are detailed below.

Regionalisation

This is a top-to-bottom approach in which the national level TSA is available. For the sub-national regions, some specific indicators are available and the national TSA is apportioned using the ratios obtained from these indicators.

This approach has been used by many countries like Canada (Barber-Dueck et al., 2003³); Australia (Van Ho et al. 2008⁴), and the northern European countries of Denmark, Finland, and Norway (Zhang 2005⁵, Konttinen 2006⁶, Braendvang et al. 2001⁷). These countries have developed RTSAs using the national TSA or national accounts and the input-output system, essentially consisting of SUT.

Regional Estimation

This approach, also called the bottom-top approach, entails the development of a specific TSA for any given region, in which specific situations and differentials may also be identified for important sub-regional territories, provided there sufficient information is available about them. Hence, this approach helps in preparing the regional TSA (RTSA), similar to the procedure used for preparing the national-level TSA.

This approach has been used by various regions of Spain, the most recent being the one presented in 2010 for the Madrid region (Instituto de Estadística-C. Madrid, 2011)⁸. This approach has also been used by other countries like Wales in the United Kingdom (Jones et al. 2010⁹) and Flanders-Brussels (Weekers, 2012)¹⁰. These TSAs are developed using the SUT and other statistical and accounting information for the specific region concerned, by reproducing the basic TSA: RMF scheme on a regional scale, with the necessary adjustments required for conceptual and statistical reasons.

³ Barber-Dueck, C., and D. Kotsovos (2003). "The Provincial and Territorial Tourism Satellite Accounts for Canada 1998." Research Paper. Ottawa: Statistics Canada.

⁴ Dwyer L., Forsyth P., Spurr R., Van Ho T. The economic impact of tourism shocks: a paradigm shift in technique. In: Babu S., editor. Tourism development revisited. Sage Publications; India: 2008.

⁵ Zhang, Jie. (2005). Regional Tourism Satellite Accounts for Denmark: Accounting and modelling.

⁶ Juha-Pekka Konttinen, 2006. "Regional Tourism Satellite Account (RTSA) in Finland - Data, Concepts, Methods and Key Results," ERSa conference papers ersa06p107, European Regional Science Association.

⁷ Braendvang, K. , P. Dybedal , S. Johansen , and K. Sorensen (2001). Regional Satellite Accounts for Tourism: Data, Concepts, Methods and Application. Oslo: Statistics Norway, Institute of Transport Economics, Institute for Urban and Regional Research. Mimeo.

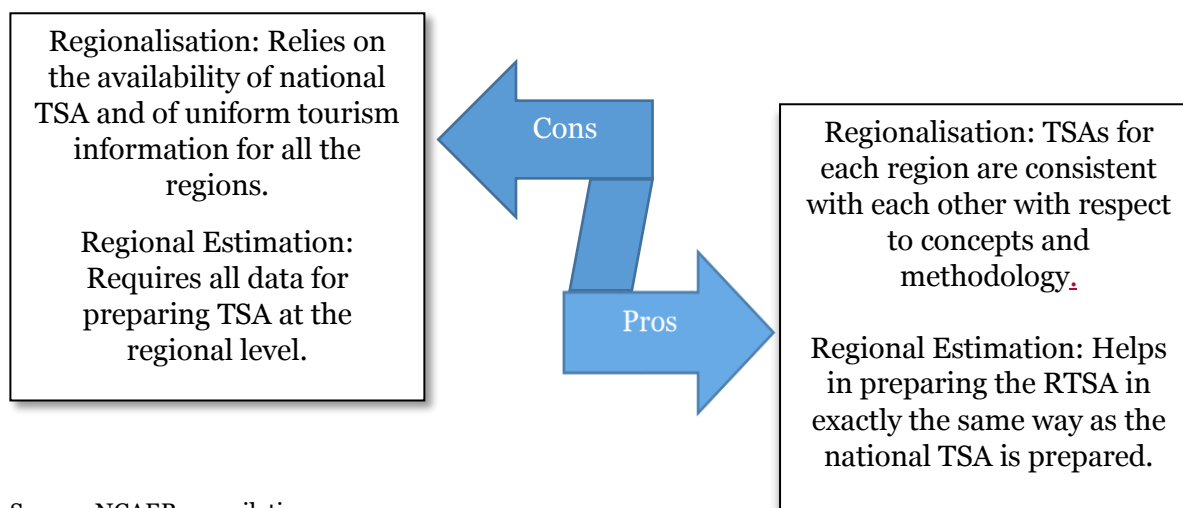
⁸ Instituto de Estadística - C. Madrid (2011), Cuenta Satélite del Turismo de la Comunidad de Madrid: metodología y primeras estimaciones (Online), available at:

<http://www.madrid.org/iestadis/fijas/estructu/economicas/contabilidad/descarga/csatturme.pdf>.

⁹ Calvin Jones & Max Munday (2010) Tourism Satellite Accounts for Regions? A Review of Development Issues and an alternative, Economic Systems Research, 22:4, 341-358, DOI: 10.1080/09535314.2010.526594

¹⁰ Weekers, K. (2012), TSA. Flemish and Brussels-Capital Region 2008, Research Centre of the Government of Flanders (Online), available: <http://www.toerismevlaanderen.be>.

Figure I.2: Pros and Cons of the Two Approaches Used for Preparing the RTSA



Source: NCAER compilation

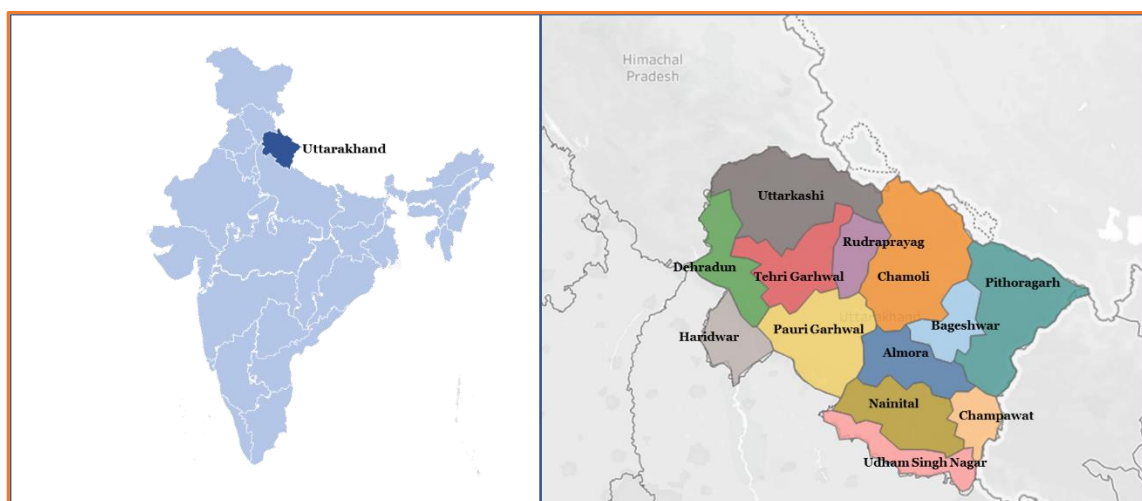
I.6. Structure of the Report

This chapter dealt with the definition and importance of tourism, the relevance of measuring the tourism statistics, concept, and uses of satellite account and TSA at the national and sub-national levels. Chapter 2 presents a snapshot of the State of reference, that is, Uttarakhand. This chapter serves as a window to the State's geographical, demographic, and economic profile. Chapter 3 presents the State tourism profile, covering various characteristics of tourism in the State. Chapter 4 provides the framework for the recommended TSA tables and tourism aggregates that have been included in this Report. Chapter 5 presents the key findings of RTSA, 2018-19. The Glossary lists the conceptual issues and operational definitions of tourism, along with the types, forms, and dimensions of tourism, and related issues.

II. Devabhumi: The State at a Glance

Uttarakhand, formerly known as Uttaranchal, is a State in the northern part of India. It is often referred to as the "Land of the Gods" due to the many holy places of tourist interest including Hindu temples and pilgrimage centres found throughout the State. Famous for showcasing the natural beauty of the Himalayas, the Bhabhar and the Terai, the State was carved out of the Himalayan and adjoining north-western districts of Uttar Pradesh on 9 November 2000, thus becoming the 27th State of the Republic of India. It borders the Tibet Autonomous Region in the north; the Mahakali Zone of the Far-Western Region, and Nepal in the east; and the Indian states of Uttar Pradesh in the south and Himachal Pradesh in the northwest. The State is divided into two divisions, Kumaon and Garhwal, comprising a total of 13 districts. The provisional capital of Uttarakhand is Dehradun, which is also a railhead and the largest city in the region. The high court of the State is based in the city of Nainital.

Figure II.1: Map of Uttarakhand



Source: NCAER's depiction of the map of Uttarakhand using tableau.

II.1. Geography of the State

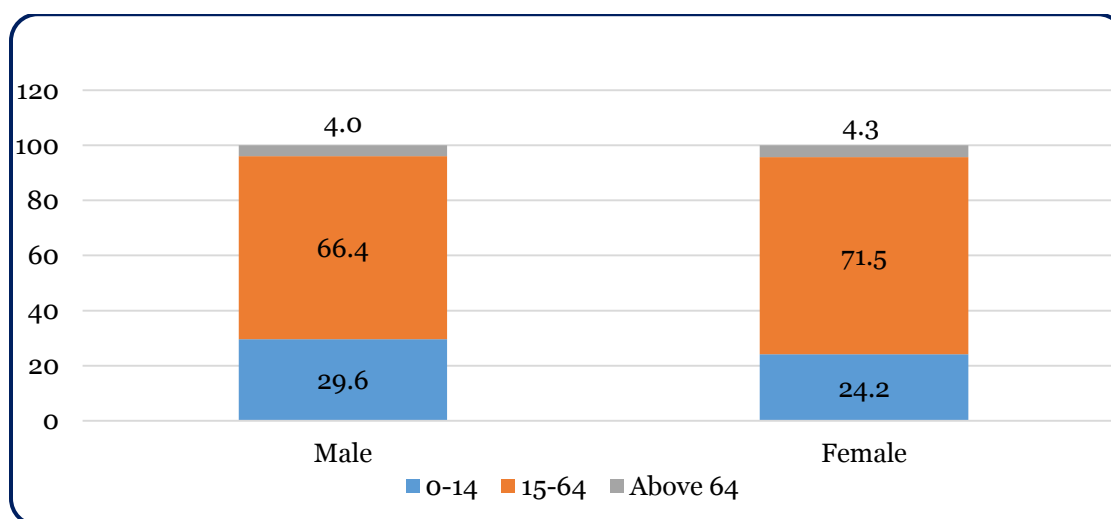
The State covers a total area of 53,483 square kilometres (km²), including 46,035 km² of hills, 7448 km² of plains, and 38,000 km² of forests. Due to its varied geography, the State has been divided into two parts, namely Garhwal (the western half) and Kumaon (the eastern half). While the Garhwal division consists of seven districts, the Kumaon division has six districts. The State is characterised by the presence of glaciers at the highest elevations and sub -tropical forests at the lowest elevations.

II.2. Demographic Profile of the State

As per the 2011 Census, the total population of Uttarakhand was 100.86 lakhs, out of which about 70 per cent resided in rural areas and the remaining in urban areas. The sex ratio of the stood at 963 females per 1000 males, which was higher than the national average of 943 females per 1000 males. The decadal growth rate of population in Uttarakhand was 18.81 per cent. The population density of the State was estimated at 189 persons per sq. km, which is lower than the national average of 368 persons per sq. km. The literacy rate of the State was 79.6 per cent.

More recent data on the demographic details of Uttarakhand may be obtained from the survey conducted by National Sample Survey Office during 2017-18 on “Household Social Consumption: Education and Health”. Figure II.2 shows the distribution of population by broad age group and gender, for the year 2017-18. The proportion of young children in the age group of 0-14 years for males and females is estimated at 29.6 per cent and 24.2 per cent, respectively. About 66.4 per cent of the total population has been found to fall in the age group of 15-64 years, whereas only 4 per cent fall in the age group of 64 years and above. In the age group of 15-64 years, the proportion of female population is about 5 percentage points more than that of their male counterparts.

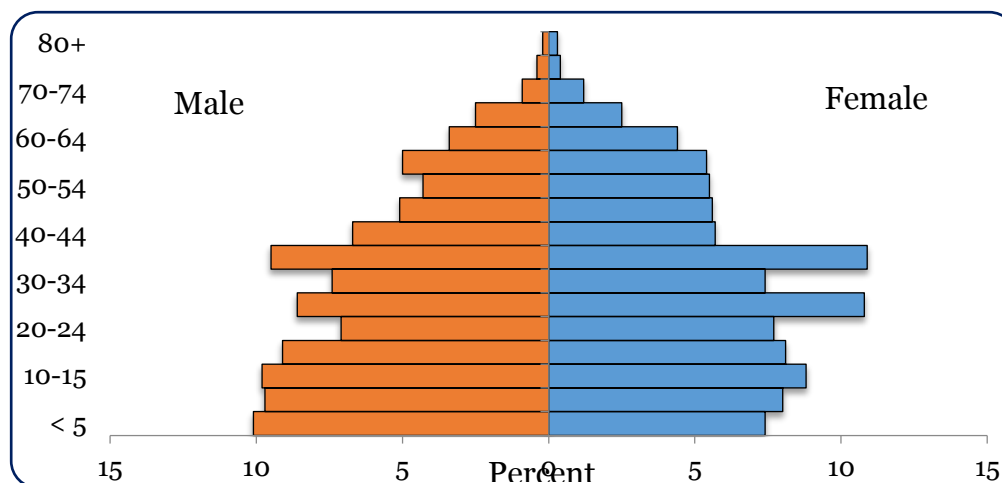
Figure II.2: Distribution of Population by Broad Age Category and Gender (%)



Source: Household Social Consumption: Education, NSSO, 2017-18.

Figure II.3 shows the age structure of the State population presented in the form of a population pyramid for the year 2017-18. An examination of this population pyramid reveals a noticeably larger young male population (aged 0-24 years) as compared to the female population in the same age group. On the other hand, an examination of the older population (aged 45 years and above) points to a larger proportion of the female population as compared to the male population in the same age group.

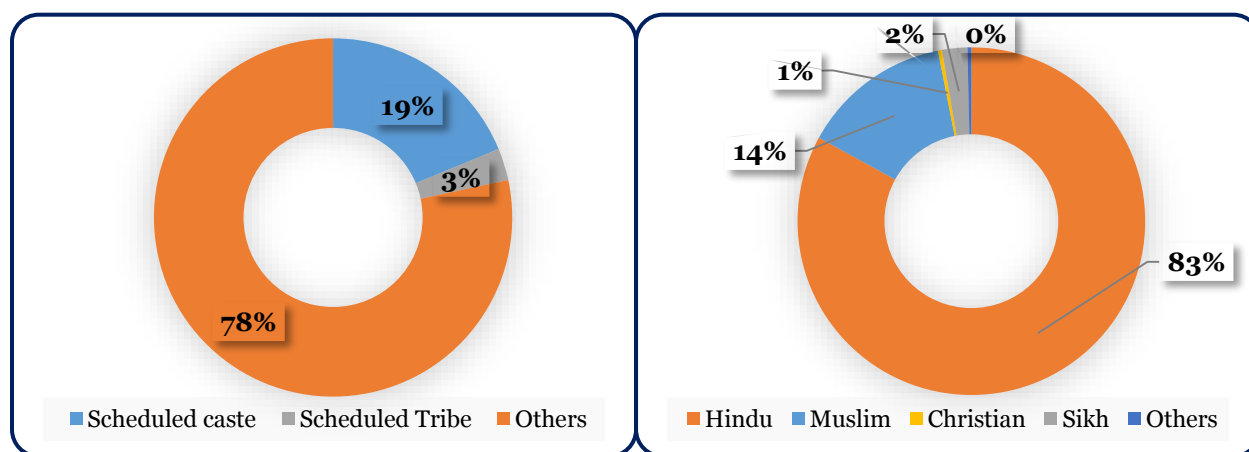
Figure II.3: Population Pyramid (%)



Source: Household Social Consumption: Education, NSSO, 2017-18.

Figure II.4 shows the percentage distribution of the population by social group and religion. As per the 2011 Census, Scheduled Tribes (STs) and Scheduled Castes (SCs) constitute 2.89 and 18.76 per cent of the population in the State. An assessment of the religion-wise population distribution shows that Hindus account for 83 per cent of the population, followed by Muslims, at 13.9 percent, and the rest of other religions, accounting for around 3 per cent of the total population.

Figure II.4: Distribution of Population by Broad Social Group and Religion (%)

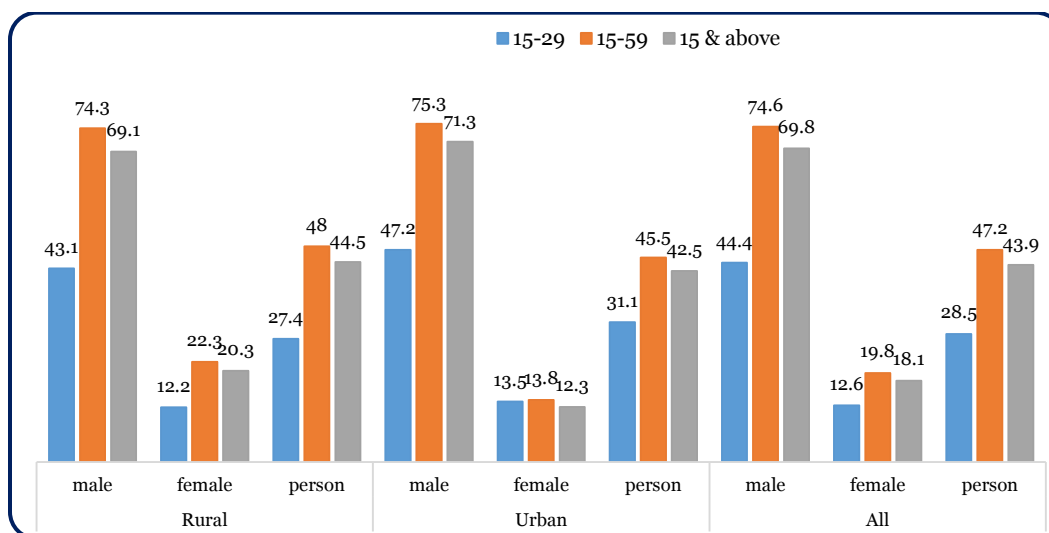


Source: Household Social Consumption: Education, NSSO, 2017-18.

II.3. Employment Data for the State

Figure II.5 shows the labour force participation rate by broad age categories, gender, and regions for the period 2017-18. According to the latest annual Employment-Unemployment Survey, the Periodic Labour Force Survey (PLFS), conducted by the National Sample Survey Office during 2018-19, in rural areas, 27.4 per cent, 48.0 per cent, and 44.5 per cent of the total population belonging to the age group of 15-29 years, 15-59 years, and 15 years and above, respectively, were either currently employed or seeking employment. The corresponding estimated figures were 31.1 per cent, 45.5 per cent, and 42.5 per cent, for the respective age groups in urban areas. The labour force participation rate for those aged 15 years and above was found to be 69.1 per cent for males and 20.3 per cent for females in rural areas. The corresponding figures were estimated at 71.3 per cent for males and 12.3 per cent for females in urban areas. The labour force participation rate for those aged 15 years and above was found to be 69.1 per cent for males and 20.3 per cent for females in rural areas. The corresponding figures were estimated at 71.3 per cent for males and 12.3 per cent for females in urban areas.

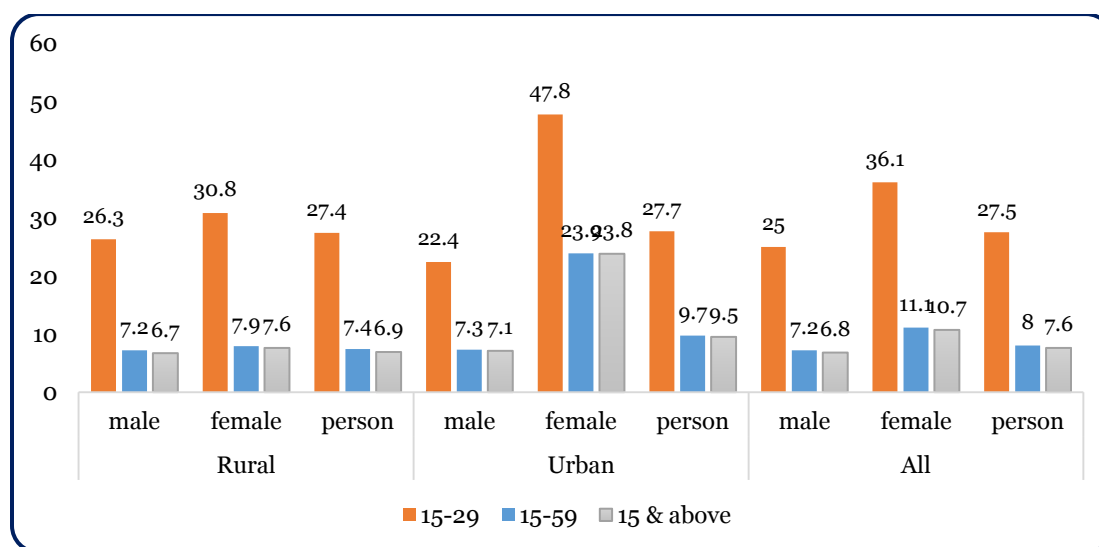
Figure II.5: Labour Force Participation Rate (LFPR) by Region and Gender



Source: Periodic Labour Force Survey, NSSO, 2018-19.

The unemployment rate in the State was found to be around 7.6 per cent for those in the age group of 15 years and above in 2018-19. The unemployment rates for men and women in the State were reported to be 6.8 per cent and 10.7 per cent, respectively. The unemployment rates for those in the age group of 15 years and above were 6.9 per cent and 9.5 per cent, respectively, for the rural and urban areas in the State. The unemployment rate among the population within the age group of 15-29 years was found to be higher as compared to that for the other age groups Figure II.6.

Figure II.6: Unemployment Rate (UR) by Region and Gender



Source: Periodic Labour Force Survey, NSSO, 2018-19.

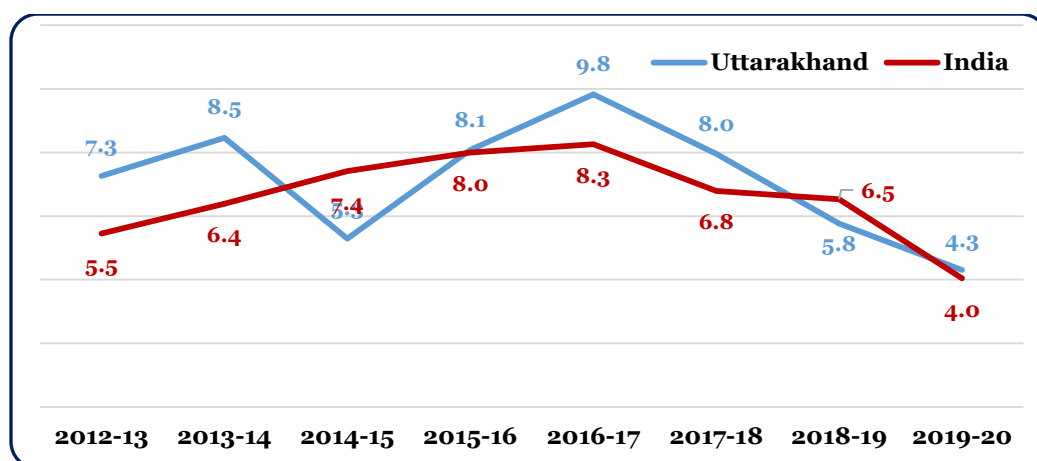
II.4. Economic Profile of the State

Uttarakhand is a Himalayan State and has vast forest and water resources. The primary sectors in the State include fruits and medicinal products, whereas the other main crops grown in the State are rice, soya, oilseeds, and pulses. There is a huge and rapidly growing food processing industry in the State. Owing to its huge forest cover, minor forest produce is also a source of livelihood for people in the State. Since it is located in the Himalayan ranges, the State is also known for its diverse flora and fauna. It is also a major producer of sports equipment and gears due to the availability of high-quality timber while hydroelectric generation accounts for the other major industry in the State.

The State's economic growth, in terms of the year-on-year growth in its Gross State Domestic Product (GSDP) was recorded at 4.3 per cent for 2019-20, which is a deceleration from the growth of 8.0 per cent and 5.8 per cent achieved in 2017-18 and 2018-19, respectively. However, this is in tandem with the national level decelerated growth of 4.0 percent in 2019-20, as compared with 6.8 percent and 6.5 percent in 2017-18 and 2018-19 respectively Figure II.7.

Of the three major sectors, industry accounted for about 45.3 per cent of the GSDP in 2019-20, remaining at about the same share value since the base year of 2011-12. Another 46.9 per cent growth was witnessed in the services sector while the remaining 7.8 per cent was contributed by the agriculture and allied sector. The share of agriculture in the total GSDP declined from 12.3 per cent in 2011-12 to 7.8 per cent in 2019-20, which translates to an equivalent gain in the share of the services sector.

Figure II.7: Growth in the Gross State Domestic Product (Constant Prices)



Source: Central Statistics Office, Government of India.

II.5. Infrastructure Profile of the State

Given the topography of Uttarakhand, roads are crucial for the people living in hills as they depend on plains for their livelihood needs. The total road length of the State is 69,777 km, of which the length of the surfaced road is 52,140 km. Despite having a tough terrain and being vulnerable to natural disasters, there is good intra-State road connectivity between all the major places in the State. It had 345 km of rail routes in 2013-14, and is focusing on increasing the share of railways in cargo and passenger transport. Initiatives have been undertaken to start monorails at Dehradun, Haridwar, and Rishikesh on the inter-city linkage routes. The main railway stations in the State are Dehradun, Haridwar, Roorkee, Kotdwar, Kashipur, Udham Singh Nagar, Haldwani, Ramnagar, and Kathgodam. Since over 86 per cent of Uttarakhand's terrain consists of hills, the State currently has limited railway services, which are largely confined to the plains. However, being the cheapest mode of transport, rail travel is the most popular means of travel for the local population.

Uttarakhand has two domestic airports, at Jolly Grant in Dehradun district, and at Pant Nagar in Udham Singh Nagar district. In 2013-14, the passenger traffic of Jolly Grant airport was 3,06,832, whereas the traffic for Pant Nagar airport was 114. In 2014-15, Jolly Grant airport recorded passenger traffic of 3,78,646, whereas, the aircraft movement and cargo handled by the airport was 4,810 and 43 tonnes, respectively.

There are three other smaller airfields in Uttarakhand, which are either not operational as yet or are operational but not open for common flights. These are Gauchar airport on the Badrinath highway in Chamoli district, which is operational but not open for common flights. Bharkot airport lies along the route of the Uttarkashi–Tehri road and is not currently open for domestic flights. The third, Naini Saini airport is situated in Pithoragarh. This airport is currently operated by the State government but it is proposed to be upgraded to facilitate operations of ATR-42 type of aircraft.

III. State Tourism Profile

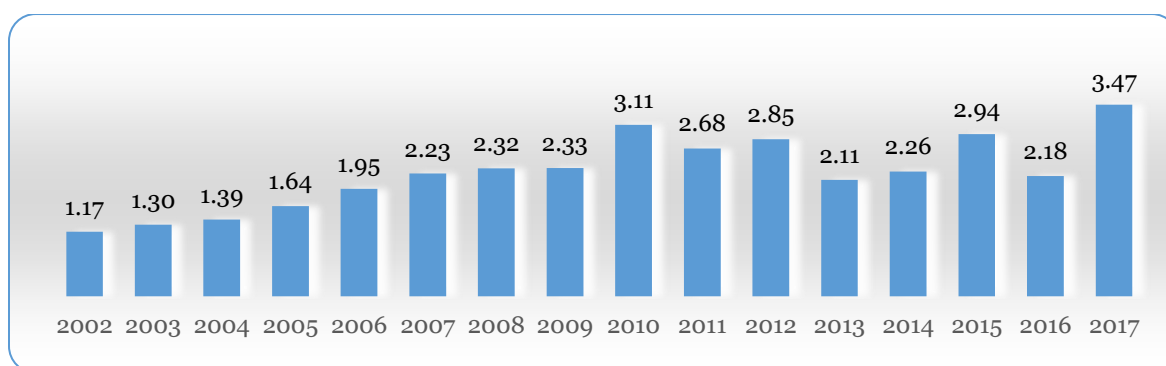
The State of Uttarakhand is naturally blessed with scenic locations, pleasant climatic conditions, lakes, snow-capped mountain peaks, glaciers, and origins of rivers, all of which are ideal tourist destinations. Besides, the State is also famous for its pilgrimage and religious sites, which is why it is also called ‘Devabhumi’. The four *dhams* in the State get their sacred waters as four streams—Yamuna (in Yamunotri), Bhagirathi (in Gangotri), Mandakini (in Kedarnath), and Alaknanda (in Badrinath).

The State is divided into two broad regions based on its agro-climatic conditions, that is, Garhwal and Kumaon. The districts that fall under the Garhwal region include Chamoli, Dehradun, Haridwar, Pauri Garhwal, Tehri Garhwal, Rudraprayag, and Uttarkashi. Those falling under the Kumaon region are Almora, Champawat, Bageshwar, Pithoragarh, Udham Singh Nagar, and Nainital.

Uttarakhand’s tourism sector plays a vital role in the State’s overall economic growth as well as in the attainment of its development goals. According to the latest estimates, a total of about 3.7 crore domestic tourists visited the State in 2018. This figure is almost three times the number of tourist arrivals in 2002, which stood at 1.2 crore. Effectively, the number of domestic tourist arrivals has grown at a cumulative annual growth rate (CAGR) of 7.5 per cent during the last decade and a half. The tourist inflow into Uttarakhand is expected to reach about 6.7 crore by 2026.

Meanwhile, foreign tourist arrivals stood at 1.5 lakh in 2018. Figure III.1 presents the time series of the total domestic tourist arrivals in the State from 2002 to 2017.

Figure III.1: Total Domestic Tourist Arrivals (in crore)



Source: Uttarakhand Economic Survey, 2018-19.

The State also has plans to expand its tourism sector by adding some niche themes, like water sports, eco-tourism, heli-skiing, and spiritual yoga tourism, as envisaged in the new Tourism Policy 2018. Following is a delineation of some of the popular themes and their tourist attractions in the state:

Pilgrimage:

Uttarakhand has been a historical and religious place, where a number of leading Hindu sacred texts, including the Vedas, the Mahabharata, and the Ramayana were believed to be composed. The State has also been a highly popular spiritual destination attracting millions of pilgrims and devotees in search of divine blessings.

Hill Stations:

Situated on the mountains of the gigantic

Famous Religious Sites in Uttarakhand

Badrinath; Kedarnath; Gangotri; Yamunotri; Rishikesh; Haridwar; Panch Badri; Panch Prayag; Hemkund Sahib; Rudraprayag; Guptkashi; Kalimath Temple; Tapkeshwar Mahadev Temple; Bharat Mata Mandir; Har ki Pauri; Mansa Devi Temple; Maya Devi Temple; Naina Devi Temple; Jhula Devi Temple; Neelkanth Mahadev Temple

Districts of Uttarakhand

Nainital; Ranikhet; Mussoorie; Champawat; Dehradun; Almora; Chamoli; Pauri Garhwal; Auli; Bageshwar; Joshimath; Pithoragarh; Devprayag; Bhowali; Lansdowne, Munsiyari; Barkot; Dhanaulti; Chamba; Harsil; Kanatal; Kausani; Gopeshwar; Mukteshwar; Ramgarh; Dwarahat; Chakrata; Vishnuprayag and New Tehri

Himalayan range, the State is home to numerous hills stations offering serene environs, captivating views, and salubrious weather for the tourist.

Famous Wildlife Sanctuaries in Uttarakhand

Valley of Flowers, Jim Corbett National Park; Rajaji National Park; Nanda Devi National Park; Kedarnath Wildlife Sanctuary; Askot Wildlife Sanctuary; Sonanadi Wildlife Sanctuary; Binsar Wildlife Sanctuary; and Gangotri National Park

Wildlife Attractions:

Uttarakhand is also the proud proprietor of India's oldest National Park, Corbett, which is also the oldest Tiger Reserve in the country. The State has a total of 12 national parks and wildlife sanctuaries, covering 13.8 per cent of its total area.

Adventure Tourism in Uttarakhand

Rishikesh river rafting; peak climbing; mountain biking; para-gliding; jeep safari and skiing. The major trekking points are Chopta Chandrashila; Har Ki Dun Trek; Nanda Devi Trek; Valley of Flowers Trek; Gangotri Tarovan Trek; Kuari Pass Trek; and Auden's Col Trek.

Adventure Tourism:

Owing to its unique topographical variety, the State offers a lot of adventure and trekking destinations. The trekking routes in Garhwal and Kumaon (Uttarakhand) are categorised as easy, moderate, and strenuous sites depending on the level of difficulty entailed in trekking to these sites.

Festivals and Traditions:

One of the most popular festivals for pilgrims in Uttarakhand is the Kumbh Mela, celebrated in a cycle of 12 years along its four river-bank sites, with the primary one being Haridwar in Uttarakhand. The Mela is known to attract the world's largest gathering of pilgrims.

Famous Pilgrimages and Festivals for Tourists in Uttarakhand

Kumbh Mela at Haridwar, Kanvad Yatra, Bissu Mela, Magh Mela, Nanda Devi Raj Jaat Yatra, Kangdali Festival, Uttarayani Mela, Nandadevi Mela, Poornagri Mela, Diwali, Holi, Janmashtami

III.1. State Tourism Policy, 2018

The Uttarakhand Tourism Development Board launched its first tourism policy in 2001 with the aim to build world-class infrastructure, attract private investment in the tourism sector, and identify new and innovative destinations for tourists. Over the years, dynamic changes and transformation have taken place in the tourism sector in terms of digitalisation, advancements in information and technology, implementation of innovative business models, and the launch of government policies like Start-up India, Digital India, the Jan-Dhana-Aadhaar-Mobile (JAM) trinity, and other measures that have catapulted the tourism sector to greater heights. Thus, the new Tourism Policy, 2018 recalibrates the tourism perspectives, strategies, and goals to reflect these transformative changes, while using knowledge of the latest future projections and market trends for mapping a new strategy for the tourism sector. The new tourism policy focuses on sustainable development, and innovative tourism products, concepts, and destinations for tourists, while simultaneously allowing the State to attain its goal of moving towards a greener economy.

The key objectives of the new Tourism Policy are to:

- Enhance and build Uttarakhand's reputation as a safe and tourist-friendly destination;
- Create and develop new tourism destinations and unique tourism products offering an unmatched experience to tourists;
- Ensure basic amenities like parking, toilets, signages, ATMs, dispensaries, ticketing counters, and Internet and telecommunication facilities at all the tourist destinations;
- Develop Uttarakhand State as a wellness hub by promoting medical tourism based-packages—the issue of the short tourist season can be resolved by developing the State as an alpine and winter destination spot;
- Promote inclusive tourism strategies through community-based tourism ensuring equitable distribution of resources to local communities;
- Promote and support entrepreneurship by setting up tourism incubators, start-ups, and skilling centres, and facilitating the entry of investors by establishing a single-window clearance system for faster approval of tourism entities that will enhance ease of doing business;
- Ensure the involvement of State and Central Government departments/ministries to leverage their various schemes, including Swadesh Darshan, PRASAD, Start-up India, Ayushman Bharat, and Swachh Bharat Abhiyaan, which would help improve the tourism infrastructure in the State; and
- Establish disaster-resilient tourism infrastructure and SOPs to reduce the impact of disasters on tourism in the State.

The guiding principles for the new tourism policy are as follows:

- Launch aggressive marketing and branding promotion techniques for Uttarakhand tourism through campaigns, roadshows, radio jingles, social media advertising, and other platforms;

- Ascertain capacity building of the tourism workforce and increase employment through skill development;
- Solicit participation and funding from the private sector, Multi-national Corporations (MNCs), multilateral organisations, allied countries, and donations through charitable organisations, Corporate Social Responsibility (CSR), individuals, and Government bonds, in tourism infrastructure development; and
- Strengthen tourism trade facilitation through single-window clearance, appointment of nodal officers, land banks, and tourism investors' meets/platforms.

The new tourism products or themes on offering are listed in Table III.1.

Table III.1: New Tourism Products

Tourism Products	Description
Wellness and Health	Uttarakhand State offers a wide variety of therapeutic and rejuvenation products that enhance the quality of life. The accreditation of wellness and rejuvenation centres by the Department of AYUSH, Uttarakhand Tourism Development Board (UTDB), and Government of Uttarakhand is a welcome step in the direction of promoting high-quality centres that match international standards.
Ecotourism and Wildlife Tourism	Ecotourism includes travel that does not disturb or hamper the natural harmony of tourist sites for environmental conservation. It includes activities like nature camps, wildlife safari, bird watching, nature tours, and visits to biodiversity parks, national parks and wildlife sanctuaries.
Film Tourism	This is a form of cultural tourism that involves setting up of filming sites and production houses, and identifying places of interest for film industries across the world, generating an interest in that tourist destination.
Service Apartments	This involves staying in vacant residential spots operated by caretakers that provide a comfortable stay for both long and short durations for tourists.
Homestay	This entails staying in the homes of local communities that offer minimum standards of hospitality and hygiene, enabling tourists to experience the local culture and cuisine.
Discover Your Roots	This is a particularly new form of tourism in which the tourists can take lineage-specific trails that give them an opportunity to discover their roots and heritage by visiting tourist destinations or spots that were inhabited by their ancestors.

Source: NCAER compilation

In order to give a boost to the tourism sector in the State, the sector has been accorded an industry status by the State Cabinet, enabling it to avail of subsidies and incentives under the Micro, Small and Medium Enterprises (MSME) Policy 2015, entailing a total project cost of up to Rs 10 crores

as well as separate provisions under the Mega Industrial and Investment Policy 2015 (as amended in 2018), for large tourism and allied projects with costs exceeding Rs 10 crores.

The tourism enterprises which are eligible for availing of concessions and subsidies include hotels; motels; flotels; yoga, ayurveda and naturopathy resorts; spa and health resorts; restaurants; private parking lots; amusement parks; festivals and carnivals; cultural tourism; hot air balloons; purchase of handicrafts; travel on cruise boats and motor boats; and adventure activities like trekking, rock climbing, and water sports. Other activities that are also eligible for concessions include ropeways, air taxis, service apartments, safaris, eco-lodges, and work related to cultural and historical heritage like traditional arts and crafts. Under this category, all the tourism enterprises have to be registered with the UTDB and obtain a registration certificate. They also have to provide adequate infrastructure support like access to and safety of parking, while ensuring that their entrances resemble the vernacular architecture of the State and that at least 10 per cent of their energy consumption is met through renewable sources. The other pre-requisites or conditions are that the beneficiaries should operate the tourism units for a minimum of five years and ensure that they report their employment generation, operations, audited financial statements, and other relevant information to the tourism department, and if they fail to meet these conditions, they will have to return the subsidy amount along with 15 per cent interest to the State.

III.2. State Tourism Characteristics

Tourism in the State of Uttarakhand is primarily led by domestic tourists, who account for over 99 per cent of the total tourist arrivals in the State. The number of domestic and foreign tourist visits by different destinations are available in a time series. These destinations have been mapped with the districts to which they belong to determine the district-wise tourist visits. Figure III.2 illustrates the foreign tourist visits by districts. The number of tourist visits increased from 1.12 lakh in 2008, to 1.54 lakh in 2018, signifying a growth of 37 per cent. While Dehradun was the most popular destination for foreign tourists during the period 2008 till 2017, the latest data shows that Tehri overtook Dehradun in 2018, becoming the most visited district in the State.

Figure III.2: Foreign Tourist Arrivals (in absolute numbers) by districts, arranged in decreasing order for the year 2018

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Tehri	14,748	15,329	16,103	20,533	15,899	13,504	17,718	19,329	21,907	37,092	46,289
Dehradun	29,080	27,470	32,173	30,840	33,029	27,445	27,948	26,944	30,933	34,636	37,885
Haridwar	17,854	20,067	29,555	26,722	26,875	22,611	20,992	18,615	21,322	23,123	22,583
Nainital	1,626	1,736	1,471	15,652	16,341	11,564	13,374	12,475	11,635	14,710	15,840
Pauri	18,611	23,903	27,353	31,888	32,563	18,012	16,684	21,162	10,591	14,142	13,051
Almora	7,536	6,210	7,814	4,863	4,803	3,938	4,471	4,178	5,690	6,038	5,827
Rudrapur	2,495	2,584	648	1,960	1,398	410	3,456	1,554	803	1,583	3,451
Others	20,473	20,944	21,342	10,229	9,616	6,112	5,305	6,837	9,918	10,778	9,600
	0K 25K 50K 0K	25K 50K 0K	25K 50K 0K	25K 50K 0K	25K 50K 0K	25K 50K 0K	25K 50K 0K	25K 50K 0K	25K 50K 0K	25K 50K 0K	25K 50K

Source: Tourist Statistics, Government of Uttarakhand.

The number of domestic tourist visits in the State was notably high at 3.7 crore in 2018, going up from 2.3 crore in 2008, registering a growth of about 60 per cent. The data indicates that the largest proportion of domestic tourists visit Haridwar, which accounts for 58.7 per cent of the total tourist arrivals across all the 13 districts of the State, followed by Dehradun, at 16 per cent of the total tourist visits. Figure III.3 presents the domestic tourist visits by districts.

Figure III.3: Domestic Tourist Arrivals (in absolute numbers) by districts, arranged in decreasing order for the year 2018

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Haridwar	113.6	120.5	188.4	134.5	152.3	127.6	154.6	193.3	204.9	209.9	215.6
Dehradun	30.6	28.0	35.9	37.9	36.9	31.6	34.9	49.5	51.6	55.9	59.8
Tehri	10.7	8.7	9.0	9.1	9.6	4.8	5.5	11.4	9.5	14.3	20.7
Chamoli	31.8	29.2	32.7	34.2	30.9	10.8	4.3	7.3	12.1	17.0	20.5
Nainital	3.2	3.5	3.4	11.3	12.3	10.3	11.4	11.5	12.0	13.1	13.3
Uttarkashi	13.1	13.8	12.1	15.8	14.9	7.3	3.0	5.7	7.7	11.4	11.6
Rudrapur	10.6	8.2	8.0	10.3	12.1	7.3	1.3	3.5	6.2	9.5	10.0
Others	17.0	19.5	20.2	13.4	14.1	10.6	10.3	10.8	12.6	14.8	15.4
	0 150 300 0	150 300 0	150 300 0	150 300 0	150 300 0	150 300 0	150 300 0	150 300 0	150 300 0	150 300 0	150 300

Source: Tourist Statistics, Government of Uttarakhand.

Since domestic tourism is the key driver of tourism in the State, in order to discuss the tourism characteristics in the State, we have analysed the unit level data of the national “Domestic Tourism in India” (or Domestic Tourism Survey or DTS) survey conducted by the National Sample Survey Office (NSSO) in 2014-15. For better representation of the State and also its districts, we have analysed the pooled data of this survey, which comprises information collected for both the

Central as well as the State samples. Hence, the pooled data is based on a total sample whose overall size is larger than that of the Central sample. The Central sample is canvassed by the NSSO while the State sample is canvassed by the State-level Statistical agencies.

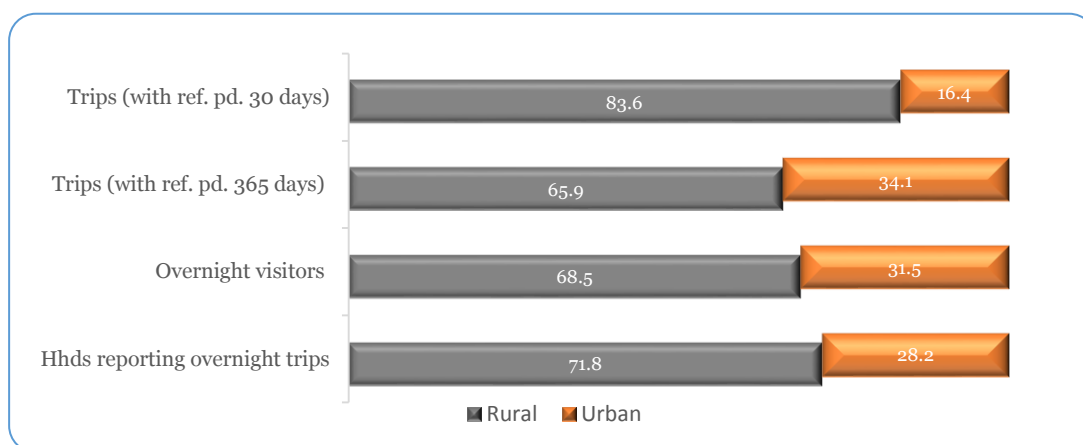
According to this survey, the total number of households in the State is estimated to be 19,490, of which 72 percent live in rural areas. The number of households which reported having undertaken an overnight trip is estimated to be 11,983, or about 61.5 per cent of the total households. The corresponding percentages were 60.6 per cent and 63.9 per cent for rural and urban areas, respectively. It may be noted that a household is reported to have undertaken a trip if:

- At least one household member performed an overnight trip during the last 365 days for the following leading purposes:
 - Health and medical;
 - Holidaying, leisure and recreation; or
 - Shopping.
- At least one household member performed an overnight trip during the last 30 days for the following leading purposes:
 - Business;
 - Social;
 - Religious and pilgrimage;
 - Education and training; or
 - Others.

It may be further noted that the information on trips was collected differently for different leading purposes of trips, that is, the reference period for some trips is 365 days while for others is 30 days. Hence, the survey captures all the trip characteristics for two sets of trips—one with a reference period of 365 days, and the other with that of 30 days. Even the total number of trips has been presented separately for these two sets of trips.

The total number of overnight visitors is estimated to be 31.4 lakh, including 21.5 lakh (or 68.5 per cent) in rural areas and 9.9 lakh (or 31.5 per cent) in urban areas. However, the total number of overnight trips with a reference period of 365 days was 16.8 lakh, whereas the corresponding figure for trips with a reference period of 30 days is 3.6 lakh. The share of rural trips is higher in the case of trips with a 30-day reference period, largely because of a higher number of social trips. The percentage break-up of households, overnight visitors, and trips is presented in Figure III.4.

Figure III.4: Distribution of Parameters by Rural/Urban Areas



Source: Domestic Tourism Survey (pooled data), 2014-15

➤ Purposes of Trips

The information on the purpose of trip is asked with the following two separate perspectives:

- **Visitor's purpose:** The visitor's purpose of a trip of a household member is that purpose but for which he/she would not have undertaken the trip.
- **Leading purpose:** The leading purpose of a trip is that purpose without which none of the household members in that trip would have undertaken the trip. The leading purpose of a trip is unique to all the members participating in that trip.

Table III.2 presents the distribution of overnight trips by visitor's purposes, for both the 30-day and 365-day reference periods. The results show that, in Uttarakhand, people travel mostly for social purposes¹¹ in both rural and urban areas. In urban areas, the share of social trips is higher than that in rural areas, across both men and women. It may also be noted that the share of social trips is around 80 per cent, across all the trips for which the reference period is 30 days, that is, when the leading purposes of trips are business, social, religious, and educational and others. However, the share of such trips is quite significant (29.3 per cent for male and 43.7 per cent for female tourists) even when the reference period is 365 days, that is, when the leading purpose of the trip is one of the following three purposes: holiday, medical, or shopping. This means that even when the leading purpose of the trip was not social, the visitor's purpose of at least one member of the trip was social.

¹¹ Social purpose of tourism includes visiting friends and relatives, and attending marriages, among other such occasions.

Table III.2: Per 1000 Distribution of Overnight Visitor Trips Completed during last 30 Days and 365 Days by Purpose of the Trip for Male and Female Tourists

		Visitor's Purpose (When Leading Purposes Are Business, Social, Religious, Education or Others)								
		Business	Holiday	Social	Religious	Education	Health	Shopping	Others	All
Rural	Male	73	1	743	34	50	30	0	70	1000
	Female	6	1	824	13	58	54	0	43	1000
	All	44	1	778	25	53	40	0	58	1000
Urban	Male	27	42	883	20	8	0	0	20	1000
	Female	12	12	904	27	1	14	0	29	1000
	All	20	28	893	23	5	6	0	24	1000
All	Male	64	9	770	31	42	24	0	60	1000
	Female	8	4	841	16	45	45	0	40	1000
	All	39	7	801	24	44	33	0	51	1000

		Visitor's Purpose (When Leading Purposes Are Leisure, Health and Shopping)								
		Business	Holiday	Social	Religious	Education	Health	Shopping	Others	All
Rural	Male	10	310	251	22	4	311	68	25	1000
	Female	3	214	418	27	1	292	31	14	1000
	All	7	266	327	24	3	302	51	20	1000
Urban	Male	22	401	373	24	8	111	21	40	1000
	Female	1	331	468	37	12	73	10	67	1000
	All	12	367	420	30	10	93	15	53	1000
All	Male	14	341	293	23	5	242	52	30	1000
	Female	2	258	437	31	6	209	23	34	1000
	All	9	303	360	27	5	227	38	32	1000

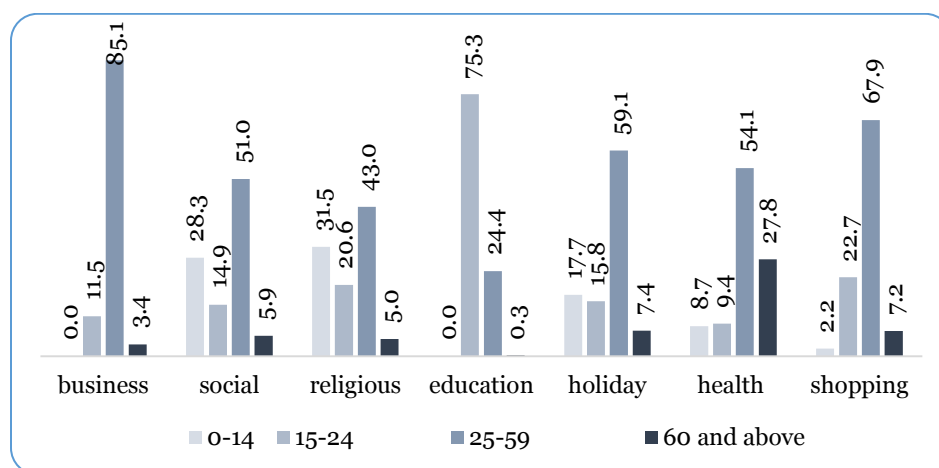
Source: Domestic Tourism Survey (pooled data), 2014-15

➤ Distribution by Age

With respect to age, the highest number of visitors belong to the 25-59 year age group. However, there is variation with respect to the purpose of the visits (Figure III.5). The highest number of visitors travelling for business purposes belong to the 25-59 year age group, accounting for a share of 85 per cent of the total number of tourists. As regards education purposes, tourists belonging

to the age group of 15-24 years constitute 75 per cent of the total visitors, while the remaining tourists belong to the 25-59 year age group. About 82 per cent of the tourists making health-related trips belong to the age of 25 years and above, whereas among those undertaking shopping trips, 67.9 per cent belong to the 25-59 year age group.

Figure III.5: Percentage Distribution of Visitors by Age Groups across Visitors' Purposes



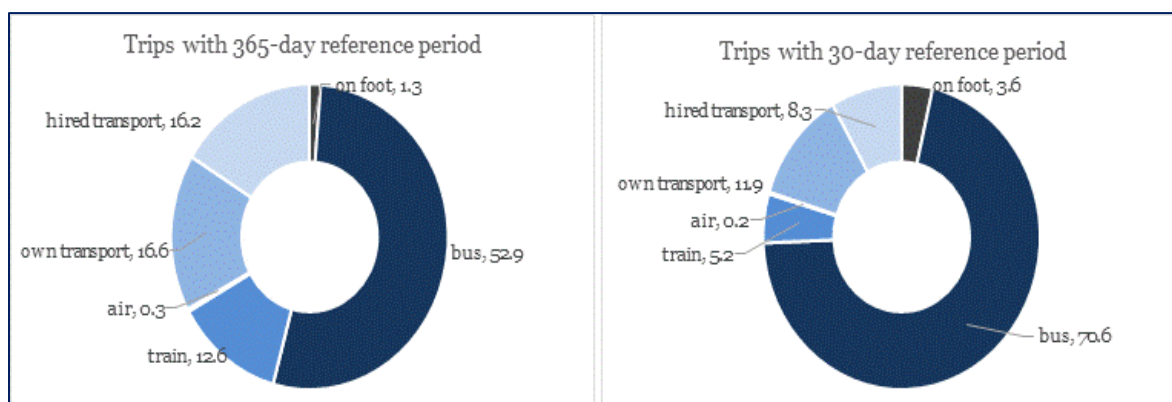
Source: Domestic Tourism Survey (pooled data), 2014-15

➤ Modes of Transport

Travel by bus is the most preferred mode of transport, in the case of both visitor trips with leading purposes of holiday, health, and shopping (with a 365-day reference period) as well as for those undertaking trips for other leading purposes (with a 30-day reference period). These modes of transport account for 52.9 per cent of the total in the case of former and a much higher figure of 70.6 per cent in the case of the latter (Figure III.6).

In the case of trips where the leading purposes are holiday, health, and shopping, both own as well as hired transport are the preferred modes of travel, together accounting for 32.8 per cent of the total visitor trips. Travel by train is reported in 12.6 per cent of the visitor trips. As regards trips made for the rest of the leading purposes, the proportion of own and hired transport stands at 20.2 per cent while that of train is 5.2 per cent.

Figure III.6: Distribution by Modes of Transport



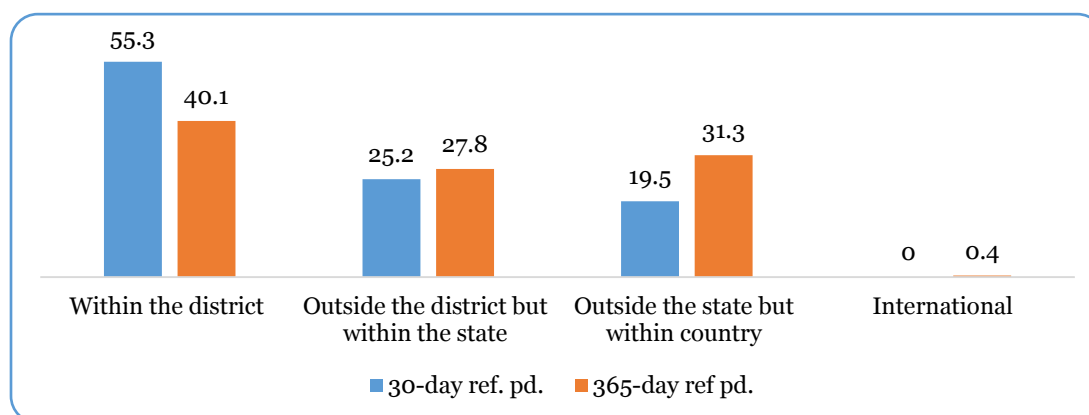
Source: Domestic Tourism Survey (pooled data), 2014-15

➤ Main Destination

The destinations for a majority of the trips originating from the State of Uttarakhand lie within the State. In the case of trips whose leading purposes are holiday, health, and shopping (with a 365-day reference period), 67.9 per cent of the trips are undertaken within the State, with 40.1 per cent being undertaken within the same district as the normal residence of the visitor and 27.8 per cent being undertaken outside the district but within the State (Figure III.7).

In the case of trips undertaken for other leading purposes (with a 30-day reference period), a higher proportion of trips is undertaken within the State, primarily because social trips account for a large proportion of these trips. About 80 per cent of the trips with a 30-day reference period are undertaken within the State.

Figure III.7: Distribution of Trips by Main Destination

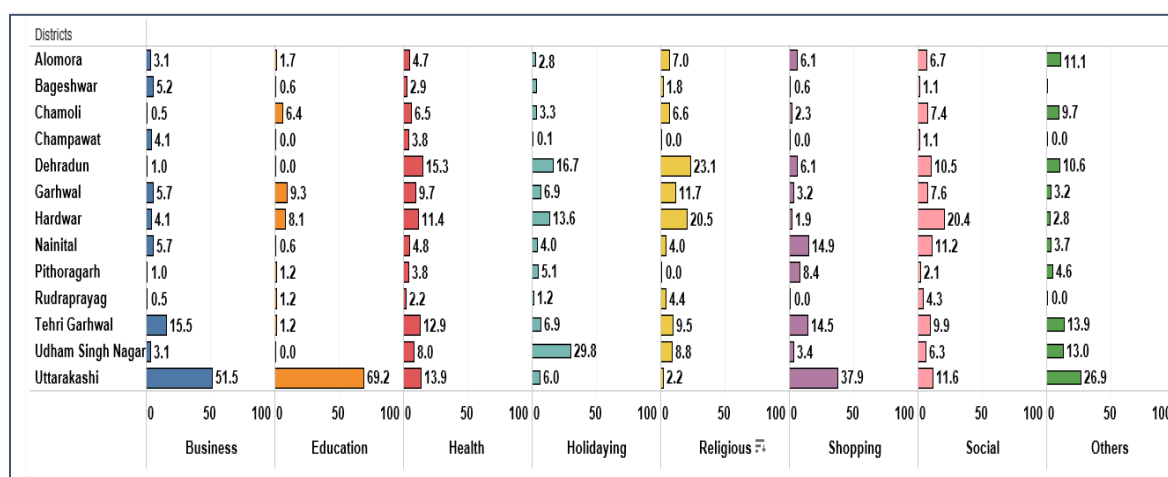


Source: Domestic Tourism Survey (pooled data), 2014-15

➤ Leading Tourism Purposes by Districts

Interesting findings emerge from the survey with regard to the leading purposes and their distribution across the districts. It was found that trips undertaken for purposes of business, education, and shopping are undertaken the most by tourists from Uttarkashi, which accounts for 51.5 per cent of business trips, 69.2 per cent of educational trips, and 37.9 per cent of shopping trips. Udham Singh Nagar, followed by Dehradun and Haridwar, account for the maximum number of holiday trips, with their shares recorded at 29.8 per cent, 16.7 per cent, and 13.6 per cent, respectively. Dehradun and Uttarkashi account for the maximum number of health-related trips, at 15.3 per cent and 13.9 per cent, respectively. Dehradun and Haridwar account for the highest number of religious trips undertaken by tourists (Figure III.8).

Figure III.8: Distribution of Trips with Different Purposes by Districts

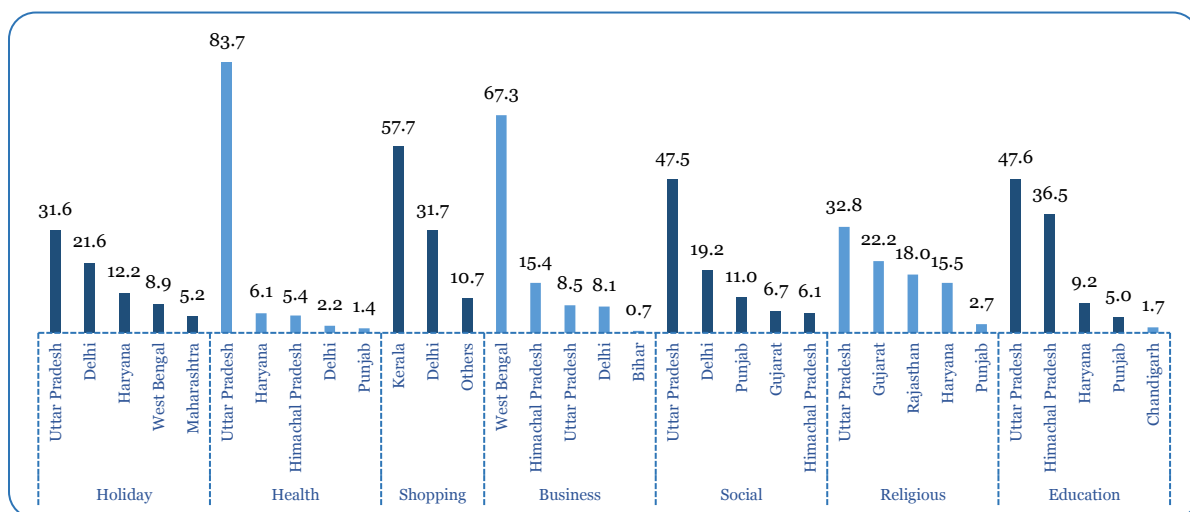


Source: Domestic Tourism Survey (pooled data), 2014-15

➤ Trips from Other States

Most of the trips undertaken to Uttarakhand originate from the northern States of India, like Uttar Pradesh, Delhi, Haryana, and Punjab. However, tourists from distant States like Gujarat, Maharashtra, and West Bengal also visit Uttarakhand for different purposes. Figure III.9 highlights the top five origin States, that is, Uttar Pradesh, Delhi, Haryana, West Bengal, and Maharashtra, which account for the maximum trips undertaken to the State, by different purposes. Of all the health-related trips, 83.7 per cent are undertaken by the tourists from Uttar Pradesh, whereas West Bengal accounts for the highest share of business trips, at 67.3 per cent.

Figure III.9: Top Five States from Where Trips Are Undertaken in Uttarakhand for Different Purposes (percent distribution)



Source: Domestic Tourism Survey (pooled data), 2014-15

IV. Methodology

As mentioned in Chapter 1, two main types of approaches are followed to prepare the regional TSAs—Regionalisation or the Top-bottom Approach and Regional Estimation or the Bottoms-up Approach. For India, based on the availability of data and feasibility of these approaches, the TSA can be prepared at the State-level using the Regionalization Approach and thereafter by refining it further by using the State tourism and other consumption characteristics.

The sets of tables and accounts that make up the standard Tourism Satellite Account are the key for estimating the economic contribution of tourism in the economy, through the compilation of demand-side and supply-side information of tourism-specific goods and services. At the national level, these tables are ten in number and are prepared in a standard format as recommended by the United Nations World Tourism Organization (UNWTO) in the TSA: RMF 2008, with each country having the flexibility to decide on the most adequate format for taking into account the characteristics of its tourism and scope of the available data. These ten tables are described below (Tables IV.1).

Table IV.1: Standard TSA Tables

	TSA Table	Brief Description
1.	Inbound Tourism Expenditure	Expenditure of a non-resident visitor within the economy of reference.
2.	Domestic Tourism Expenditure	Expenditure by resident visitors on tourism-related products within the economy; it is the sum of the household tourism expenditure and business and government tourism expenditure.
3.	Outbound Pre-trip Tourism Expenditure	Expenditure by resident visitors, who plan to travel abroad, on tourism-related products within the economy of reference and incurred before arriving at the international port of exit and after returning to the international port of entry.
4.	Total Internal Tourism Consumption	Sum of inbound, domestic, and outbound pre-trip expenditure, along with the components of imputed tourism consumption like social transfers, and vacations homes, among others.
5.	Production Account of Tourism Industries	Supply-side information in the Supply and Use Table (SUT) framework.
6.	Supply and Internal Tourism Consumption	Confrontation of demand and supply to arrive at the Tourism Product and Tourism Industry Ratios.
7.	Tourism Employment	Number of jobs associated with tourism.
8.	Tourism Gross Fixed Capital Formation	Total value of a producer's acquisitions, less disposals, of fixed assets during the accounting period.
9.	Tourism Collective Consumption	Part of Government Final Consumption Expenditure, which is meant for the community as a whole, for providing services related to tourism.
10.	Non-Monetary Tourism Indicators	All non-monetary tourism-related indicators.

Source: UNWTO, Recommended Methodological Framework, 2008

However, at the State level, it is not possible to compile all the ten tables, due to data limitations. Based on the information that is available at the State level in India, TSA Tables 1 to 5 and 7 can be compiled without much difficulty, though some assumptions need to be made for this. However, Tables 8 and 9 on Tourism Gross Fixed Capital Formation and Tourism Collective Consumption, respectively, cannot be included due to the non-availability of these data at the State level.

At the State level, the recommended framework is adopted to the maximum extent possible. Essentially, preparation of a state TSA requires the following components:

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

The methodology involved in preparing the TSA Tables, for the present study on Uttarakhand, is described in the following sections. However, before presenting the description of the State TSA Tables, it is important to mention that TSA: RMF 2008 recommends certain sets of activities and products to be included while compiling the TSA. Each table presents the desired information for a set of goods and services, identified as tourism-specific products, which are further classified as follows:

Tourism-characteristic Products: These are the products that would cease to exist in meaningful quantity, or for which sales would be significantly reduced, in the absence of tourism. Under the international TSA standards, the core lists of tourism characteristic products, based on the significance of their links to tourism in the worldwide context, are recommended for implementation to facilitate international comparison. The international TSA standards also recommend that country-specific tourism characteristic products should be identified.

Tourism-connected Products: These are the products which are consumed by visitors but are not considered as tourism characteristic products. While some of the activities have been specified distinctly, some are recommended to be country-specific. Accordingly, a comprehensive set of activities and products were identified in the compilation of national as well as State TSAs. Both the recommended and the adopted classifications are shown separately for products and activities in Table IV.2.

Table IV.2: Products Recommended in TSA: RMF 2008 versus Products Included in State TSA, 2018-19

Products Recommended in the TSA: RMF 2008	Products Used for State TSA in India
Accommodation services for visitors	Hotels
Food and beverage serving services	Restaurants
Railway passenger transport services	Railway passenger transport services
Road passenger transport services	Land passenger transport including via pipeline
Water passenger transport services	Water passenger transport
Air passenger transport services	Air passenger transport
Transport equipment rental services	Renting of transport equipment
Travel agencies and other reservation services	Tourism related supporting and auxiliary transport activities
Cultural services	Cultural and religious services
Sports and recreational services	Sporting and recreational services
Country-specific tourism characteristic goods	Medical and health
Country-specific tourism characteristic services	Processed food products
	Beverages
	Tobacco products
	Readymade garments
	Printing and publishing
	Leather footwear
	Travel related consumer goods
	Soaps and cosmetics
	Gems and jewellery

Source: NCAER compilation.

IV.1. Data Sources

The data for the demand-side information were obtained from the latest tourism expenditure surveys commissioned by the Ministry of Tourism, Government of India. These include the Domestic Tourism Survey, conducted by the National Sample Survey Office during 2014-15, and the International Passenger Survey, conducted by the Indian Statistical Institute (ISI), Kolkata during 2015-16. These data were updated for the reference year of 2018-19 for this study, using the retail inflation for each item of tourism expenditure.

Further, the production accounts were obtained from the GSDP statements of the State of Uttarakhand. The State's latest Supply and Use Table (SUT) for 2015-16 was used for the study, as the structure of the economy and its transactions are assumed to remain the same for few years. However, the SUT for 2015-16 was updated to 2018-19 for this study.

The latest data on tourist arrivals in the State for 2018-19, were obtained from the Tourist Statistics, Government of Uttarakhand. Each of these TSA Tables is described in the sections below.

IV.2. Inbound Tourism Expenditure

TSA Table 1 focuses on inbound tourism or tourism activity undertaken by non-resident visitors in the economy of reference. This table presents the tourism expenditure incurred by non-resident visitors within the economy of reference on tourism characteristics and tourism-connected products and services. An inbound tourism trip to a country refers to the travel of a visitor from the time of arriving in the country to the time of leaving that country.

However, at the regional or State level, inbound tourism expenditure comprises expenditure incurred by visitors from other countries as well as by those from other States of the same country. These expenditures are incurred within the State of reference on tourism characteristics and tourism-connected products and services.

The TSA: RMF 2008 recommends that the inbound tourism expenditure should be obtained through surveys conducted at the exit points. However, some of their sub-sets may also be available from the balance of payments statistics and national accounts statistics. In the case of countries where administrative controls do not exist at the borders and where surveys of travellers cannot be implemented at the border, it is recommended that surveys of travellers at places of accommodation be used in parallel with other sources (for example, surveys at the popular tourism sites or other destinations).

In order to prepare this table for TSA for Uttarakhand, the data on Inbound Tourism Expenditure were obtained from the International Passenger Survey (IPS), 2015-16, conducted by ISI, Kolkata (Box IV.1). The survey collected the details of expenditure incurred by an inbound tourist within the geographical territory of India, and it does not identify the States where the expenditures were incurred. But, for the State-level estimates, it is important to capture data on the expenditure incurred in the State of destination by an inbound tourist visiting that State. It may also be noted that the inbound tourist may have travelled to one or more States. The survey data does not separately capture the expenses incurred in each of these States of destination.

Nonetheless, the survey does ask the respondents to provide the names of the last place of night halt (LPNH). The detailed information on item-wise expenses incurred at the LPNH were also collected, besides the expenditure incurred during the entire trip to India. Hence, the inbound tourism expenditure the imputed value obtained from the expenditure incurred by the international tourists at these LPNHs.

Box IV.1: International Passenger Survey

The International Passenger Survey (IPS) was carried out during 2015-16, for the purpose of capturing the inbound tourism expenditure at the country level. The survey targeted the following three categories of International tourists:

- Foreign nationals visiting India,
- Non-Resident Indians visiting India, and
- Indian Residents travelling abroad.

A multi-stage sampling design was adopted to conduct the survey at each of the selected airports and land check posts. During the first stage, six airports, namely Bengaluru, Chennai, Dabolim (Goa), Delhi, Kolkata, and Mumbai were selected purposely keeping in mind the different geographical zones of India. Among the remaining international airports, four airports, namely, Amritsar, Cochin, Hyderabad, and Pune, were selected using the sampling scheme with probability proportional to foreigners' departure as its size measure.

Among the land posts, the survey was conducted at Haridaspur, Changrabandha, and Mahadipur.

The respondents were asked to name these places, which are locations in the various States. These LNPHs were mapped with the States in which they are located. For Uttarakhand, the following locations were identified as LPNHs by the respondents:

- Auli;
- Badrinath;
- Bageshwar;
- Champawat;
- Dehradun;
- Doiwala;
- Gangotri;
- Haldwani;
- Haridwar;
- Kashipur;
- Kedarnath;
- Lansdowne;
- Nandaprayag;
- Rudraprayag;
- Sultanpur;
- Mussoorie;
- Nainital;
- Ranikhet; and
- Rishikesh.

An aggregation of the expenditure incurred, by each item separately and by each type of tourist in all the places located in a particular State was used to obtain the expenditure pattern in that State.

The total number of tourists reporting these expenditures, by the type of tourists, was also obtained.

These expenditure data were adjusted to account for the package component and for the amount reimbursed by the government or others. Since the package and the reimbursed components could not be obtained by the States, the national level factor was used to inflate them. The per-tourist expenditure by the types of tourists obtained from these data were applied on the actual number of tourist arrivals in the State (in 2018-19), to derive the total inbound tourism expenditure incurred by foreign tourists in Uttarakhand.

Besides, the price change between 2015-16 (the reference year for IPS) and 2018-19 is also accounted for. The item-wise values of expenditure were inflated using the State retail inflation of corresponding items (Appendix A1). The imputed State-level Inbound Tourism Expenditure incurred by tourists arriving from other countries has been obtained for Uttarakhand and presented in TSA Table 1A.

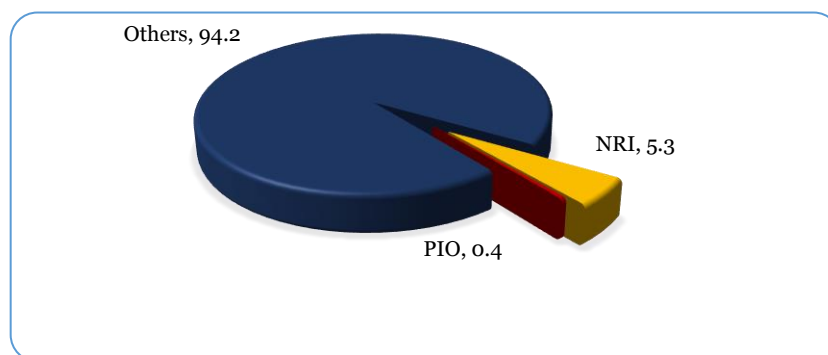
TSA Table 1A: Inbound Tourism Expenditure Incurred by International Tourists

(Rs Lakh)					
Item	NRI	PIO	OCI	Others	Total
A.1 Tourism Characteristic Products/Services					
Accommodation services	780	13	0	15,012	15,805
Food and beverage serving services	504	18	0	7355	7877
Railway passenger transport services	0	0	0	55	55
Road passenger transport services	235	13	0	1296	1543
Water passenger transport services	0	0	0	0	0
Air passenger transport services	818	19	0	9307	10,143
Transport equipment rental services	118	0	0	1614	1732
Travel agencies and other reservation services	0	0	0	27	27
Cultural and religious services	208	22	0	8688	8918
Sports and other recreational services	0	0	0	150	150
Health and medical-related services	61	0	0	4298	4359
A.2 Tourism-connected Products					
Readymade garments	726	40	0	16,333	17,099
Processed food	0	0	0	116	116
Alcohol and tobacco products	233	9	0	1351	1593
Travel-related consumer goods	0	0	0	376	376
Footwear	360	0	0	4669	5030
Soaps, cosmetics, and glycerine	6	0	0	522	528
Gems and jewellery	31	0	0	7789	7820
Books, journals, magazines, stationery, etc.	60	4	0	1499	1564
Total expenditure	4140	138	0	80,458	84,736
Estimated number of tourists 2018-19	4986	403	0	87,861	93,251
Per-tourist expenditure (Rs)	83,019	34,286	0	91,574	90,868

Source: NCAER computation using International Passenger Survey, 2015-16

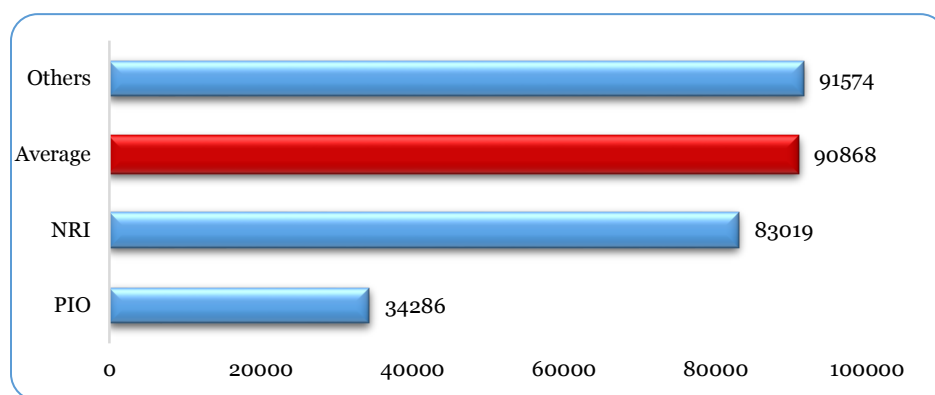
It is estimated that about 93,251 international tourists¹² travelled to Uttarakhand in 2018-19. Of these, 94.2 per cent of the inbound international tourists visiting the State belonged to the “Others” category (Figure IV.1).

Figure IV.1: Percent Distribution of International Inbound Tourists



Source: NCAER computation using International Passenger Survey, 2015-16

Figure IV.2: Average Per-tourist Expenditure (Rs.) Incurred by International Tourists in Uttarakhand



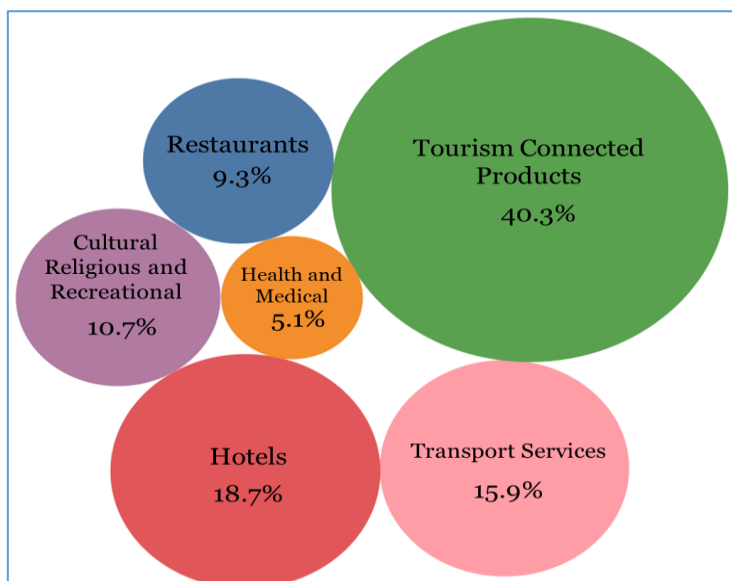
Source: NCAER computation using International Passenger Survey, 2015-16

The average per tourist expenditure incurred by an inbound international tourist visiting the state of Uttarakhand is presented in Figure IV.2. The average per tourist expenditure, taking into account the total expenditure of Non-Resident Indians (NRIs), Persons of Indian Origin (PIOs), Overseas Citizens of India (OCIs), and all other types of residents from other countries, is estimated to be Rs 90,868.

¹² It may be noted that the Tourist Statistics of Uttarakhand provides the number of international tourist visits to various destinations. However, for the purpose of TSA, the number of tourists is required. Using the national ratio of tourist visits to tourist arrivals, the number of tourist arrivals is obtained for the State.

Figure IV.3 shows the percentage distribution of expenditure by major items of consumption which consist of tourism characteristic products and services, and tourism-connected products. An estimated 40.3 per cent of the total expenditure was made on tourism-connected products, followed by 18.7 per cent on hotels for accommodation services and 10 per cent on cultural, sports, religious, and other recreational services.

Figure IV.3: Percentage Distribution of International Inbound Tourism Expenditure (Incurred by International Tourists) by Products and Services



Source: NCAER computation using International Passenger Survey, 2015-16

IV.3. Inbound Tourism Expenditure Incurred by Tourists Arriving from Other States

The inbound tourism at the State level also includes the tourism-related activities of the visitors from other States of the country to the State of reference. These data were collected in the Domestic Tourism Survey (DTS) conducted by the National Sample Survey Office in 2014-15. This survey captured the tourism expenditures made by the domestic tourists (Box IV.2). It also collected comprehensive information on the expenditure incurred by tourists on a detailed set of items which were mapped with the tourism characteristic and tourism-connected (together called tourism-specific) products and services.

The information on the place of destination was also collected and categorised as follows:

- Within the same district;
- Outside district but within the State;
- Outside the State; and
- Outside the country.

Box IV.2: Domestic Tourism Survey

The first Domestic Tourism Survey (DTS) was conducted by NCAER in 2003-04, which was used by NCAER in the preparation of the first National TSA. The National Sample Survey Organisation (NSSO) conducted its first comprehensive survey on domestic tourism in 2008-09. This was an all-India household survey and was carried out as part of NSSO's 65th Round of sample surveys.

NSSO then carried out a similar survey on Domestic Tourism, in its 72nd round of the survey. The purpose of the survey was primarily to provide the requisite tourism-related estimates for preparing the national as well as State-level TSAs.

The focus of DTS was on capturing the details of domestic overnight trips. A stratified multi-stage design was adopted for this survey. A total of 8001 villages in rural India and 6061 urban blocks in urban India were surveyed after selection by Probability Proportional to Size with Replacement (PPSWR). In all, 79,497 households from rural and 60,191 from urban India were surveyed.

The households selected for the survey were ones that met at least one of the following criteria:

- Have at least one member who undertook an overnight trip during last 365 days for the following leading purposes:
 - Health and medical;
 - Holidaying, leisure, and recreation; and
 - Shopping.
- Have at least one member who undertook an overnight trip during the last 30 days for the following leading purposes:
 - Business;
 - Social;
 - Religious and pilgrimage;
 - Education and training; and
 - Others.

It may be noted that information on trips is collected differently for different leading purposes of trips, that is, the reference period for some trips is 365 days while for others, it is 30 days. Hence, the survey captures all the trip characteristics for two sets of trips – one with a 365-day reference period and the other with a 30-day reference period. Even the total number of trips is presented separately for these two sets of trips.

The data on the item-wise expenditure incurred during the overnight trips originating from any State (other than the State of reference) and for which the main destination was the State of reference, were collected to arrive at this component of inbound tourism expenditure. These expenditures were estimated by the leading purpose of the trip, that is, business, leisure, social, religious, educational, medical, shopping, and others. The package component of the expenditure and the amount paid or reimbursed by the government or others was also added.

The item-wise expenditures are adjusted for the under-estimation observed in such data when it is collected through household surveys. The inability to recall the expenses and in some cases, the reluctance to report the actual expenses leads to such under-estimations. The under-estimation is established when the household consumption expenditure collected through the survey is compared with the Private Final Consumption Expenditure (PFCE) given in the National

Accounts Statistics. The factors for adjusting this under-estimation at the State level are assumed to be the same as those at the all-India level.

The item-wise adjustment factors are presented in Table IV.3.

Table IV.3: Consumption Expenditure Adjustment Factors

Tourism-specific Products/Services	Adjustment Factors
A.1 Tourism Characteristic Products/Services	
Accommodation services	3.15
Food and beverage serving services	3.15
Railway passenger transport services	1.00
Road passenger transport services	5.68
Water passenger transport services	11.93
Air passenger transport services	6.81
Transport equipment rental services	1.00
Travel agencies and other reservation services	5.10
Cultural and religious services	0.10
Sports and other recreational services	1.50
Health and medical-related services	1.21
A.2 Tourism-connected Products	
Readymade garments	1.81
Processed food	1.32
Alcohol and tobacco products	3.24
Travel-related consumer goods	1.74
Footwear	2.49
Soaps, cosmetics, and glycerine	0.82
Gems and jewellery	1.45
Books, journals, magazines, stationery, etc.	0.53

Source: NCAER computation.

Further, since the reference period for the TSA Uttarakhand is 2018-19, we have imputed the number of trips by purposes, using the growth seen in the number of domestic tourist visits in 2018-19 over 2014-15.

Also, the item-wise price adjustment is done taking into account the price change over the years. The item-wise inflation factors are presented in Appendix A1.

As mentioned earlier, the survey provides the estimated number of trips and the estimated tourism expenditure for two different reference periods—the last 365 days and the last 30 days. While the NSS does not provide any estimate or methodology to estimate the total number of trips for a uniform reference period, the same has been estimated for the purpose of constructing the TSA.

For this, the purpose-wise ratio of the number of trips with a 30-day reference period to the number of trips with a 365-days reference period was derived, using data from the DTS 2008–

09. These purpose-wise ratios were applied on the corresponding purpose-wise number of trips with a 30-day reference period, as obtained from the DTS 2014–15.

Hence, the estimated number of trips for the 365-day reference period has been taken as it is. For the 30-day reference period, the estimated number of trips has been imputed by applying the ratio of the 365-day to the 30-day trips, as found in DTS-2008-09 on it.

The table on inbound tourism expenditure incurred by tourists from other States to Uttarakhand is presented as TSA Table 1B.

TSA Table 1B: Inbound Tourism Expenditure Incurred by Tourists from Other States by Products and by Leading Purposes

(Rs Lakh)									
Item	Business	Holiday, leisure and recreation	Social	Religious	Education and training	Health and medical	Shopping	Other	Total
A.1 Tourism Characteristic Products/Services									
Accommodation services	14,153	38,998	4710	73831	536	3426	92	824	1,36,569
Food and beverage serving services	16,400	36,141	30,038	1,22,426	7601	4767	175	377	2,17,924
Railway passenger transport services	1183	1095	492	5729	12	19	6	8	8542
Road passenger transport services	399	30,693	90,880	1,34,229	3721	2307	297	526	2,63,052
Water passenger transport services	0	0	0	0	0	0	0	0	0
Air passenger transport services	0	15,836	0	10,902	0	3222	0	0	29,960
Transport equipment rental services	1586	4948	4076	13,748	3	666	1	3	25,032
Travel agencies and other reservation services	0	1864	470	4029	0	230	7	0	6600
Cultural and religious services	0	86	10	645	1	1	3	0	745
Sports and other recreational services	0	1158	79	108	18	18	4	0	1384
Health and medical-related services	2	389	283	934	5	22230	1	1	23,845
A.2 Tourism-connected Products									
Readymade garments	5296	9359	34,553	16402	0	230	28	5	65,872
Processed food	271	1354	6821	2944	4	149	16	0	11,559
Alcohol and tobacco products	639	505	3710	208	0	8	2	40	5112
Travel-related consumer goods	109	790	999	1753	0	35	0	0	3686
Footwear	1593	1115	3314	777	0	1	5	0	6805
Soaps, cosmetics, and glycerine	106	146	163	309	4	35	0	2	765
Gems and jewellery	0	1386	722	1590	0	0	1	0	3700
Books, journals, magazines, stationery, etc.	412	457	265	613	97	6	22	0	1871
Total expenditure	42,148	1,46,319	1,81,584	3,91,178	12,001	37,350	659	1784	8,13,023
Estimated number of trips, 2018-19	4,24,668	3,81,186	19,11,798	24,91,233	62,499	49,946	2250	43,067	53,66,646
Per-trip expenditure	9925	38,385	9498	15,702	19,202	74,781	29,294	4143	15,150

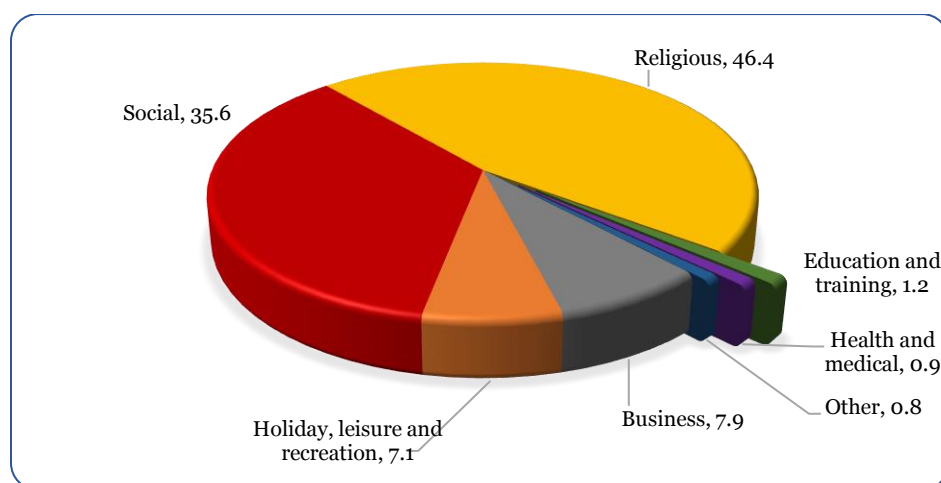
Source: NCAER computation using Domestic Tourism Survey, 2014-15.

It is estimated that during 2018-19, about 53.66 lakh trips were made to the State of Uttarakhand by tourists from the other States of India visiting the State for various purposes indicated in Box IV.2. Of these, 46.4 per cent of the inbound tourist trips from other States were made for religious

purposes, followed by 35.6 per cent of the trips made for social purpose to the State of reference. (Figure IV.4).

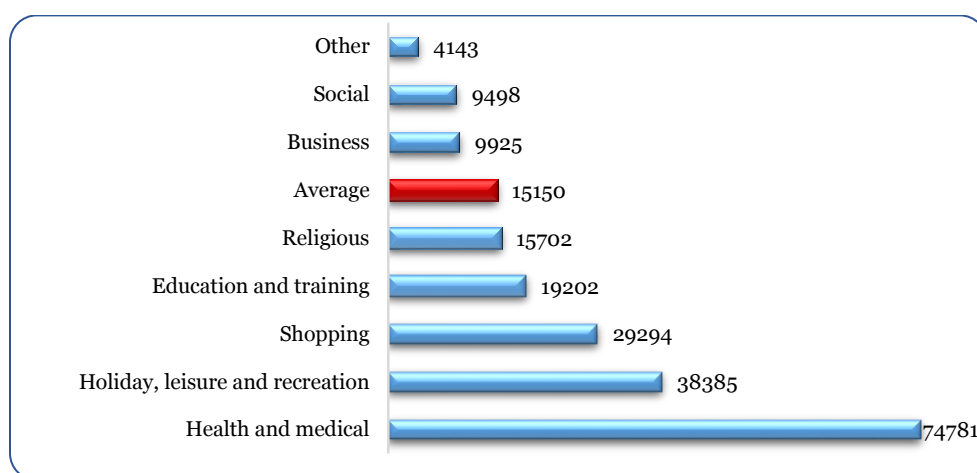
The average per trip expenditure incurred by an inbound tourist from another State visiting the State of Uttarakhand is presented in Figure IV.5. Taking into account the expenditure made for various purposes to visit Uttarakhand, the average per trip expenditure is estimated to be Rs 15,150.

Figure IV.4: Percentage Distribution of Inbound Tourists from Other States to the State of Reference by Leading Purposes of Travel



Source: NCAER computation using Domestic Tourism Survey, 2014-15.

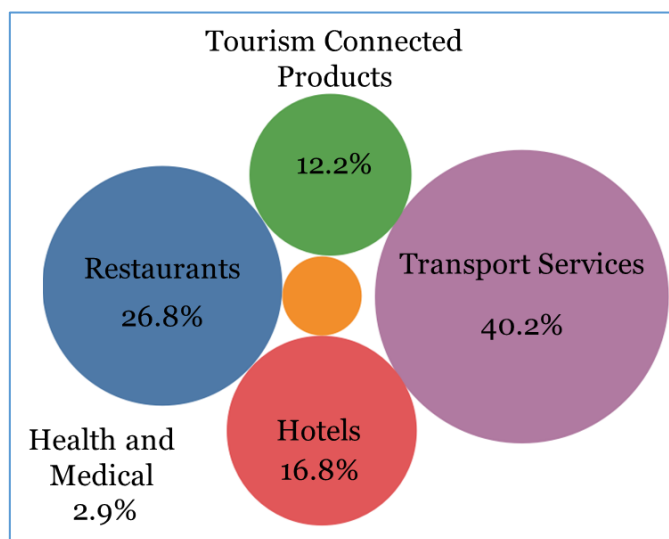
Figure IV.5: Average Per-tourist Expenditure (Rs) Incurred by Tourists from Other States to the State of Reference



Source: NCAER computation using Domestic Tourism Survey, 2014-15.

Figure IV.6 shows the percentage distribution of expenditure by major items of consumption which consist of tourism characteristic products and services, and tourism-connected products. While 40.2 per cent of the total expenditure was incurred on transport services, 26.8 per cent was incurred on food and beverage providing services.

Figure IV.6: Percentage Distribution of Inbound Tourism Expenditure (Incurred by Tourists from Other States) by Products and Services



Source: NCAER computation using Domestic Tourism Survey, 2014-15.

IV.4. Domestic Tourism Expenditure

TSA Table 2 focuses on domestic tourism by products and by purposes of travel. It presents the Domestic Tourism Expenditure, which is the expenditure of a resident visitor from within the economy of reference. At the State level, this table refers to tourists from within the State, that is, tourists living in the State of reference, travelling to another place within the same State of reference.

According to the TSA: RMF 2008 recommendations, household surveys should be conducted to collect information on domestic tourism expenditure. According to IRTS 2008, “Because there are no international borders to cross, the observation of the flows of domestic tourism requires the use of different statistical procedures. As far as overnight tourism is concerned, accommodation statistics are an important statistical source of information on domestic and inbound visitors. Measurement challenges nonetheless arise with these statistics in terms of separating out visitors from other travellers, and domestic from inbound visitors. Information can also be obtained from household surveys by interviewing people about trips undertaken in a specified period”.

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

For State-level TSAs, the domestic tourism expenditure incurred by tourists originating from a State and visiting another place in the same State has been taken under consideration.

The methodology used for estimation of expenditure is the same as that used for estimating the inbound tourism expenditure incurred by tourists from other States to the State of reference.

Details on the domestic tourism expenditure incurred by tourists from within the State of Uttarakhand is presented in TSA Table 2.

TSA Table 2: Domestic Tourism Expenditure Incurred by Tourists from within the State

(Rs Lakh)

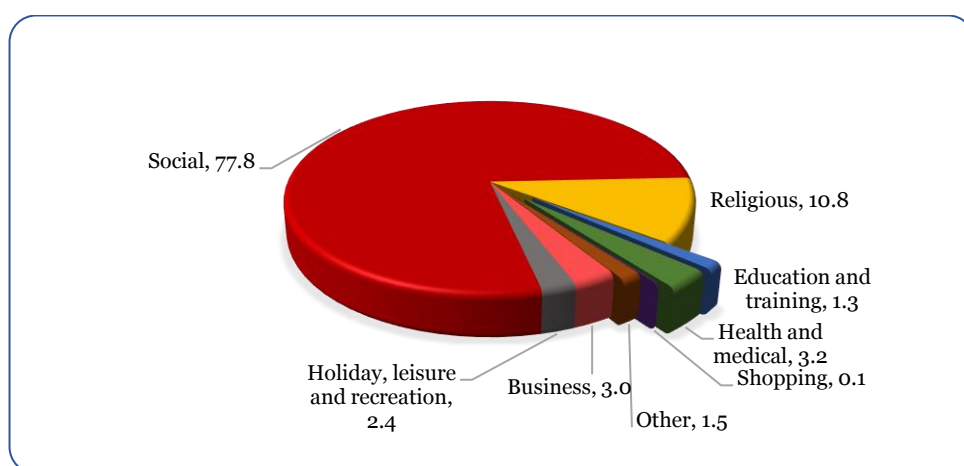
Item	Business	Holiday, leisure and recreation	Social	Religious	Education and training	Health and medical	Shopping	Other	Total
A.1 Tourism-characteristic Products/Services									
Accommodation services	1779	3065	2680	17586	552	4977	5	598	31242
Food and beverage serving services	3823	5530	64275	23080	1005	6242	31	949	104935
Railway passenger transport services	0	134	272	405	0	2	0	0	812
Road passenger transport services	7583	10,096	1,73,956	43,737	3453	8175	164	3313	2,50,475
Water passenger transport services	0	0	0	0	0	0	0	0	0
Air passenger transport services	0	0	0	0	0	0	0	0	0
Transport equipment rental services	53	464	3707	491	144	763	12	21	5654
Travel agencies and other reservation services	0	24	493	0	0	96	0	0	613
Cultural and religious services	0	19	45	354	0	0	0	0	417
Sports and other recreational services	0	272	188	0	7	16	0	0	483
Health and medical-related services	1	134	1322	327	0	25672	0	232	27,689
A.2 Tourism connected products									
Readymade garments	153	4436	98,373	8643	88	684	468	120	1,12,967
Processed food	82	500	12,927	3258	132	416	16	193	17,524
Alcohol and tobacco products	1020	103	3287	5	78	108	28	80	4709
Travel-related consumer goods	0	93	624	407	0	50	4	0	1177
Footwear	0	880	20,123	6528	31	244	101	19	27,927
Soaps, cosmetics, and glycerine	22	105	2055	399	4	93	6	22	2707
Gems and jewellery	0	205	7581	231	0	0	844	0	8862
Books, journals, magazines, stationery, etc.	3	185	507	845	63	3	0	1	1607
Total expenditure	14,521	26,243	3,92,415	1,06,294	5557	47,543	1681	5548	5,99,802
Estimated number of trips 2018-19	2,46,294	2,00,398	54,55,307	3,98,240	1,06,038	2,62,319	6199	1,21,579	32,96,375
Per-trip expenditure	5896	13,095	6079	11834	5241	18,124	27,113	4563	7230

Source: NCAER computation using Domestic Tourism Survey, 2014-15.

It is estimated that during 2018-19, about 82.96 lakh trips were made to the State of Uttarakhand by the domestic tourists from within the State for leading purposes, as indicated in Box IV.2. Of these, 77.8 per cent of the domestic tourist trips from within Uttarakhand were made for social purposes, followed by 10.8 per cent of the trips that were made for religious purposes (Figure IV.7).

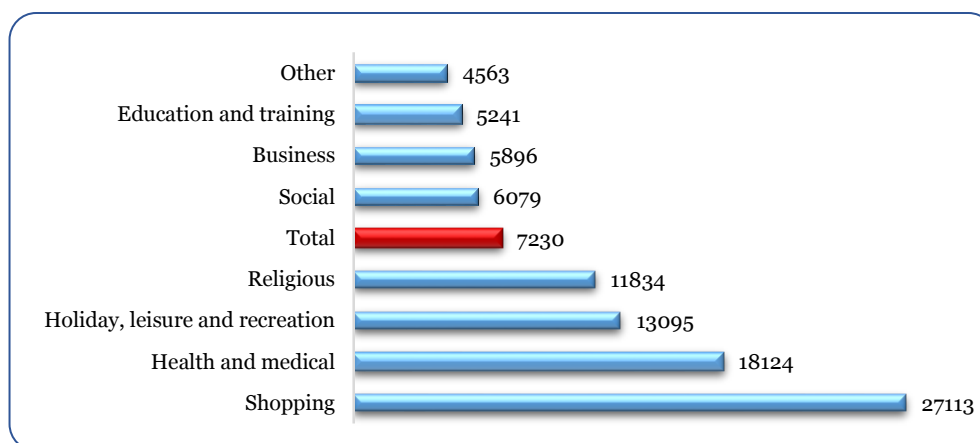
The average per trip expenditure incurred by a domestic tourist from within the State is presented in Figure IV.8. Taking into account the expenditure made for various leading purposes to visit Uttarakhand, the average per trip expenditure is estimated to be Rs 7,230.

Figure IV.7: Percentage Distribution of Domestic Tourists by Leading Purposes of Travel



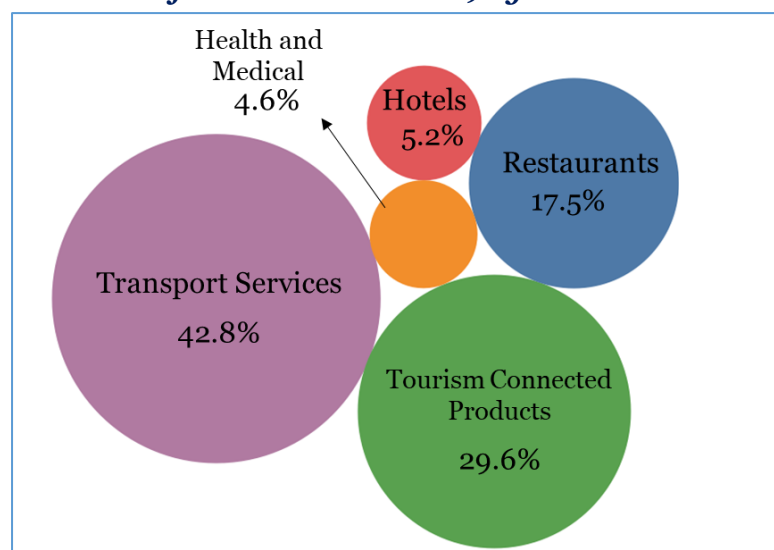
Source: NCAER computation using Domestic Tourism Survey, 2014-15

Figure IV.8: Average Per-tourist Expenditure (Rs) Incurred by Tourists from within the State of Uttarakhand



Source: NCAER computation using Domestic Tourism Survey, 2014-15.

Figure IV.9: Percentage Distribution Of Domestic Tourism Expenditure (Incurred by Tourists from within the State) by Products and Services



Source: NCAER computation using Domestic Tourism Survey, 2014-15.

Figure IV.9 shows the percentage distribution of expenditure by major items of expenditure, which consist of tourism-characteristic products and services, and tourism- connected products. While 42.8 per cent of the total expenditure was incurred on transport services, 29.6 per cent was incurred on tourism-connected products by domestic tourists in Uttarakhand.

IV.5. Outbound Pre-trip Tourism Expenditure

TSA Table 3 focuses on outbound tourism, that is, tourism activity undertaken by a resident visitor outside the country of reference. However, since the TSA covers all the expenditure incurred within the geographical boundary of the country of reference, TSA Table 3 presents only the pre-trip expenditure incurred by outbound tourists, covering the expenses incurred in preparation of the outbound trip. For example, this may include the shopping expenses or travel expenses incurred by the tourist from the place of residence to the final port of departure or any other expenses incurred within the geographical boundary of the country of reference.

At the State level, the outbound trip refers to the trip undertaken by the resident of the State of reference outside the country and also that undertaken in another State of the country. The expenditure, which is taken into account in both the cases, is the pre-trip expenditure, that is, the expenditure undertaken within the State of reference before the actual trip starts.

The data on outbound tourism pre-trip expenditure incurred by residents travelling abroad were collected by administering a separate questionnaire in the survey conducted by ISI, Kolkata,

which was a part of the IPS. However, the data on expenditure incurred by resident visitors travelling to other States of India was beyond the scope of either survey—DTS or IPS.

The pre-trip expenditure incurred by outbound tourists was recorded for a detailed set of items and was mapped with the tourism-characteristic and tourism-connected products and services. The mapping of consumption items with the tourism-specific products and services is the same as that in the case of inbound tourism expenditure (TSA Table 1a). The methodology to derive the estimated outbound pre-trip expenditure is also the same as in the case of TSA Table 1a. The total item-wise expenditure incurred by outbound tourists within the State is presented in TSA Table 3.

TSA Table 3: Pre-trip Outbound Tourism Expenditure Incurred by Tourists Travelling Abroad

(Rs Lakh)								
Item	Business	Holiday	Social	Religious	Education/ training	Medical	Others	Total
A.1 Tourism-characteristic Products/Services								
Accommodation services	50	214	0	0	10	0	48	322
Food and beverage serving services	133	230	26	0	11	0	25	425
Railway passenger transport services	0	40	1	0	0	0	33	73
Road passenger transport services	108	102	13	0	5	0	53	281
Water passenger transport services	0	0	0	0	0	0	0	0
Air passenger transport services	0	0	0	0	0	0	47	47
Transport equipment rental services	0	0	0	0	0	0	0	0
Travel agencies and other reservation services	0	4	0	0	0	0	0	4
Cultural and religious services	0	0	0	0	0	0	0	0
Sports and other recreational services	0	0	0	0	0	0	0	0
Health and medical-related services	26	12	1	0	1	0	0	40
A.2 Tourism-connected Products								
Readymade garments	0	1544	0	0	0	0	0	1544
Processed food	0	13	0	0	0	0	73	87
Alcohol and tobacco products	0	22	0	0	0	0	93	115
Travel-related consumer goods	0	0	0	0	0	0	0	0
Footwear	0	0	0	0	0	0	0	0
Soaps, cosmetics, and glycerine	0	0	0	0	0	0	0	0
Gems and jewellery	0	95	0	0	0	0	0	95
Books, journals, magazines, stationery, etc.	9	150	4	0	0	0	0	164
Total expenditure	327	2424	46	0	27	0	373	3196
Estimated number of tourists - 2015-16	9621	16,653	1404	0	920	0	9234	37,831
Per-tourist expenditure (Rs)	3397	14,553	3244		2935		4045	8449

Source: NCAER computation using International Passenger Survey on Outbound Tourists, 2015-16

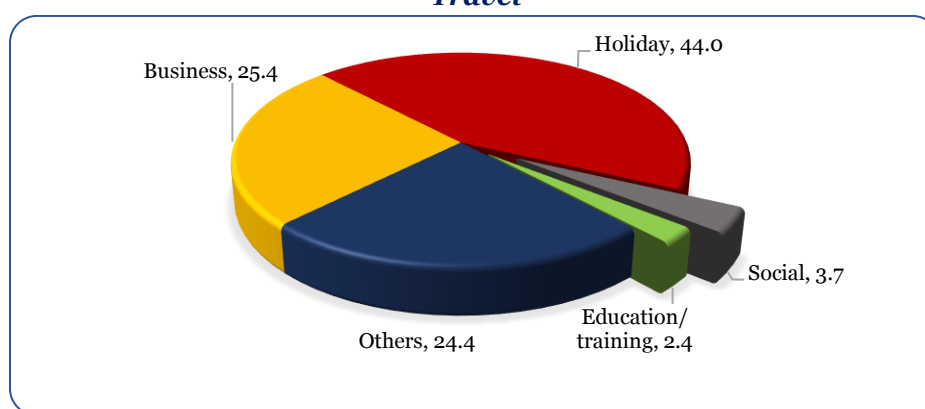
The estimated number of outbound tourists from the state of Uttarakhand, for the year 2018-19, is derived from the estimated corresponding number for 2015-16, as obtained from the IPS. The growth in the number of outbound tourists departing from the nearest airport to Uttarakhand,

that is, Delhi, is used as a proxy to determine the growth in the number of outbound tourists from Uttarakhand between 2015-16 and 2018-19.

A total of 37,831 residents of the State of Uttarakhand have been estimated to have travelled outside the country as outbound tourists during 2018-19. Of these, 44 per cent of the residents travelled abroad for holidaying while about 25 per cent of the residents travelled outside the country with business as their leading purpose of travel (Figure IV.10).

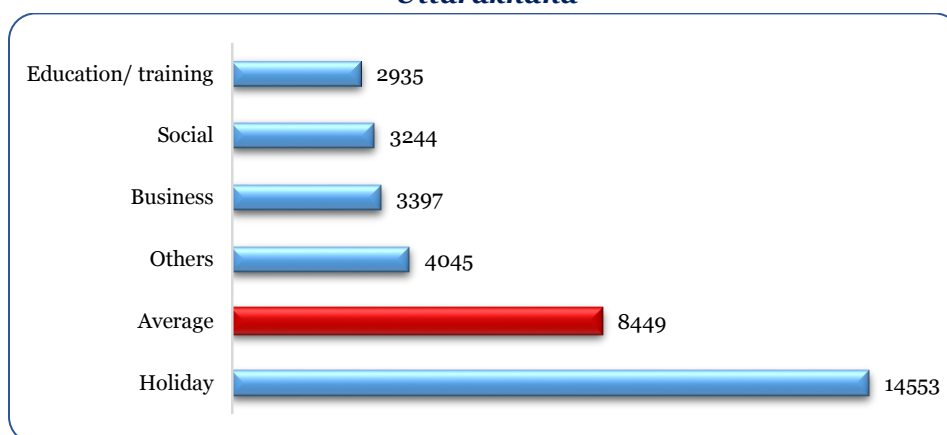
The average per trip expenditure incurred by the outbound tourists originating from Uttarakhand is presented in Figure IV.11. Taking into account the expenditure made for various leading purposes of travel outside the country, the average per trip expenditure is estimated at Rs 8,449.

Figure IV.10: Percentage Distribution of Outbound Tourists by Leading Purposes of Travel



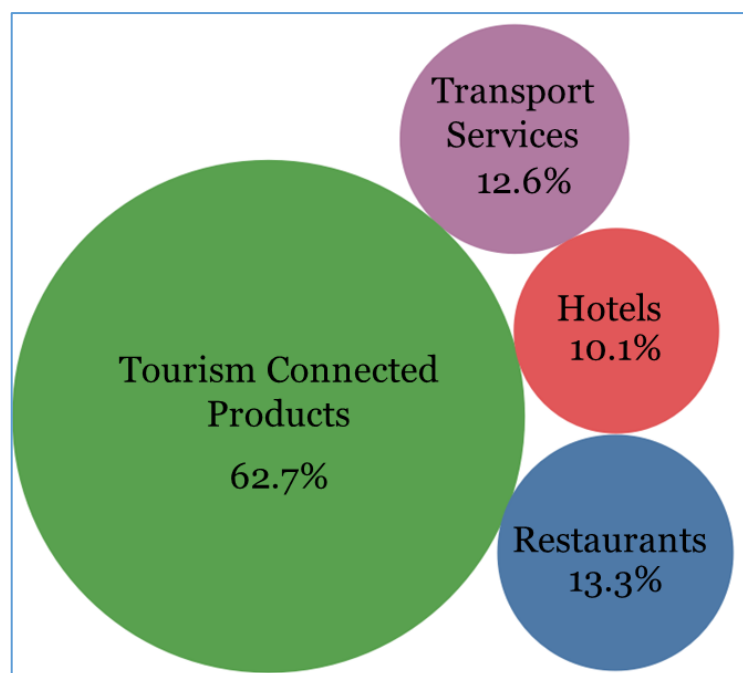
Source: NCAER computation using International Passenger Survey on Outbound Tourists, 2015-16

Figure IV.11: Average Per-tourist Expenditure (Rs.) Incurred by Outbound Tourists in Uttarakhand



Source: NCAER computation using International Passenger Survey on Outbound Tourists, 2015-16

Figure IV.12: Percentage Distribution of Outbound Tourism Expenditure by Products and Services



Source: NCAER computation using International Passenger Survey on Outbound Tourists, 2015-16

Figure IV.12 shows the percentage distribution of the pre-trip expenditure by major items of consumption, which consist of tourism-characteristic products and services, and tourism-connected products. An estimated 62.7 per cent of the total expenditure was incurred on tourism-connected products, which represent the shopping items purchased during preparation of the trip.

IV.6. Total Internal Tourism Consumption

TSA Table 4 presents the total internal tourism consumption, which is the sum of the total internal tourism expenditure and the imputed tourism consumption. The total internal tourism expenditure is the sum total of the total inbound, domestic, and outbound pre-trip tourism expenditure, presented in TSA Tables 1a, 1b, 2, and 3. Hence, it refers to the expenditure incurred by all tourists within the State of reference. In addition, the components of imputed consumption are given in separate rows, to make up the total internal tourism consumption.¹³ Since these components are not directly available from any data source, they are derived using certain plausible assumptions. These items of imputed tourism consumption, along with their descriptions and assumptions to derive their values, are presented below.

¹³ The TSA: RMF 2008 recommends that imputed consumption may be shown against a separate column, but since most of these items fall under non-tourism products, these are shown against supplementary rows under domestic tourism.

In the previous State-level TSAs, prepared for 2009-10 and 2015-16, the assumptions for the States' imputed tourism consumption were the same for all the States and for all-India. However, since the present study is a focused one for Uttarakhand, these assumptions have been modified based on the larger extent of tourism activity in this State and have been finalised after detailed consultation with the State Directorate of Economics and Statistics.

➤ **Imputed consumption on services associated with vacation homes on own account:**

While the expenditure incurred by tourists on vacation homes or homestays is included in the expenditure incurred on accommodation services, the imputed consumption refers to the services associated with these vacation homes. This also includes the imputed expenditure incurred by dwelling owners in hosting their household members who stay away and for whom the household is no longer a usual environment. This is assumed to be 10 per cent of the total owner-occupied dwelling services.

➤ **Imputed consumption towards tourism social transfers in kind (except refunds).**

This is derived from the component of “social transfer in kind” against “Recreation and Culture” in the Classification of Individual Consumption Expenditure of Households (COICOP). Household consumption on any item of consumption comprises the individual consumption expenditure and social transfers in kind (paid by the government). While the individual consumption expenditure is the Private Final Consumption Expenditure (PFCE), the social transfers in kind refers to the value of the non-market services provided by governments and Non-Profit Institutions Serving Households (NPISHs).

The imputed consumption towards social transfers in kind is the component that benefits visitors and exceeds the values paid by the visitors themselves, including the costs of museums, performing arts, short-term education, and health services provided on a short-term basis in special establishments. Since the data on the shares of these transfers that goes to the tourists and to non-tourists are not available, it is assumed to be 75 per cent for tourists, given the higher tourism intensity in the State.

➤ **Imputed value of financial intermediation services (FISIM) availed by visitors**

The value of the Financial Intermediation Services Indirectly Measured (FISIM) on purchases related to tourism trips is obtained by using the share of FISIM in PFCE (at the national level) and applying it to the total internal tourism consumption expenditure of the State. This is based on the assumption that the share of FISIM in household consumption expenditure is the same as the share of FISIM in internal tourism consumption expenditure. Also, since demand-side data

are not available for the State, it is also assumed that these shares at the national level are the same as those at the State level.

➤ **Imputed costs for producers (businesses, governments and NPISHs) on expenditures by employees on business trips**

This refers to the imputed consumption of services rendered by vacation residences provided by producers for the benefit of their employees, and includes the cost borne by the companies (mostly private corporates) on the services that they provide in their guest houses for the benefit of their employees. This is assumed to be about 1 per cent of the total output of the organised private corporate sector. The value of output of the organised private corporate sector for 2018-19 is obtained by assuming that the share of the State's private sector output to the national private sector output for 2018-19 is the same as the value of this share in 2015-16 (as given in Uttarakhand TSA for 2015-16).

➤ **Imputed costs for hosts of receiving visitors in terms of expenditure on food, utilities, invitations, and presents, among others, or the net costs of hosts.**

While the accommodation cost is recommended to be excluded from tourism consumption when the tourists stay at their friends'/relatives' places during a trip, the expense incurred on food is taken as one of the components of imputed tourism consumption. At the national level, this is obtained by multiplying the average per day expenditure of food (obtained from PFCE, NAS) with the number of days spent at the friends'/relatives' places during all the tourist trips undertaken in a reference year. This value is available for 2015-16, as per the previous TSA for the State. The same is escalated using the growth in the number of tourists between 2015-16 and 2018-19, and the value is also inflated because of the price change.

As mentioned earlier, TSA Table 4 is the sum total of TSA Tables 1a, 1b, 2, and 3, and the value of the imputed tourism consumption, as discussed above. The TSA Table 4 obtained hence is given below. This is followed by Table IV.5, which presents the percentage distribution of the imputed tourism consumption for each item of consumption, by different forms of tourism. Further, Table IV.6 presents the column distribution of different forms of tourism consumption by items.

TSA Table 4: Total Internal Tourism Consumption

(Rs Lakh)					
Item	Inbound from other countries	Inbound from other states	Domestic	Outbound	Total
A.1 Tourism-characteristic Products/Services					
Accommodation services	15,805	1,36,569	31,242	322	1,83,939
Food and beverage serving services	7877	2,17,924	1,04,935	425	3,31,161
Railway passenger transport services	55	8542	812	73	9482
Road passenger transport services	1543	2,63,052	2,50,475	281	5,15,351
Water passenger transport services	0	0	0	0	0
Air passenger transport services	10,143	29,960	0	47	40,150
Transport equipment rental services	1732	25,032	5654	0	32,418
Travel agencies and other reservation services	27	6600	613	4	7245
Cultural and religious services	8918	745	417	0	10,080
Sports and other recreational services	150	1384	483	0	2017
Health and medical-related services	4359	23,845	27,689	40	55,933
A.2 Tourism-connected products					
Readymade garments	17,099	65,872	1,12,967	1544	1,97,482
Processed food	116	11,559	17,524	87	29,286
Alcohol and tobacco products	1593	5112	4709	115	11,529
Travel-related consumer goods	376	3686	1177	0	5240
Footwear	5030	6805	27,927	0	39,761
Soaps, cosmetics, and glycerine	528	765	2707	0	4000
Gems and jewellery	7820	3700	8862	95	20,476
Books, journals, magazines, stationery, etc.	1564	1871	1607	164	5206
Total expenditure	84,736	8,13,023	5,99,802	3196	15,00,756
A.3 Other Imputed Connected Products					
21 Vacation homes			71,766		71,766
22 Social transfers in kind			7376		7376
23 FISIM			79,227		79,227
24 Producers' guest houses			2,96,906		2,96,906
25 Imputed expenditures of households on food for tourists staying with them			26,750		26,750
Total (Rs Crore)	84,736	8,13,023	10,81,826	3196	19,82,780

Source: NCAER computation.

The total internal tourism expenditure for Uttarakhand is estimated at Rs 15007.56 crore for 2018-19. Of this, 5.6 per cent or Rs 847.36 crore was incurred by the international tourists visiting the State. The value of imputed tourism consumption is estimated at Rs 4820.24 crore. Taking together the internal tourism expenditure and imputed consumption, the value of internal tourism consumption is arrived at, which stood at Rs 19827.80 crore for 2018-19.

The percentage distribution of total internal tourism consumption by forms of tourism is presented in Table IV.4.

Table IV.4: Total Internal Tourism Consumption by Forms of Tourism (% Distribution)

Item	Inbound from other countries	Inbound from other states	Domestic	Outbound	Total
A.1. Tourism-characteristic Products/Services					
1. Accommodation services/hotels	8.6	74.2	17.0	0.2	100.0
2 Food and beverage serving services/restaurants	2.4	65.8	31.7	0.1	100.0
3 Railway passenger transport services	0.6	90.1	8.6	0.8	100.0
4 Road passenger transport services	0.3	51.0	48.6	0.1	100.0
5 Water passenger transport services	0	0	0	0	0
6 Air passenger transport services	25.3	74.6	0.0	0.1	100.0
7 Transport equipment rental services	5.3	77.2	17.4	0.0	100.0
8 Travel agencies and other reservation services/supporting and auxiliary transport activities	0.4	91.1	8.5	0.0	100.0
9 Cultural and religious services	88.5	7.4	4.1	0.0	100.0
10 Sports and other recreational services	7.5	68.6	23.9	0.0	100.0
11 Health and medical-related services	7.8	42.6	49.5	0.1	100.0
A.2. Tourism-connected products					
12 Readymade garments	8.7	33.4	57.2	0.8	100.0
13 Processed food	0.4	39.5	59.8	0.3	100.0
14 Alcohol and tobacco products	13.8	44.3	40.8	1.0	100.0
15 Travel-related consumer goods	7.2	70.3	22.5	0.0	100.0
16 Footwear	12.6	17.1	70.2	0.0	100.0
17 Soaps, cosmetics, and glycerine	13.2	19.1	67.7	0.0	100.0
18 Gems and jewellery	38.2	18.1	43.3	0.5	100.0
19 Books, journals, magazines, stationery, etc.	30.0	35.9	30.9	3.1	100.0
Total expenditure	5.6	54.2	40.0	0.2	100.0
A.3 Other imputed connected products	0.0	0.0	100.0	0.0	100.0
Total (Rs. Crore)	4.3	41.0	54.6	0.2	100.0

Source: NCAER computation using TSA Table 4.

Table IV.4 shows that the tourism economy in the State is mainly driven by the tourism activities from within the country, whether undertaken in the State itself or from any other State. These account for over 95 per cent of the total internal tourism consumption in the State. The items for which the share of inbound tourism expenditure, incurred by international tourists, is significant are cultural and religious services (88.5 per cent); gems and jewellery (38.2 per cent); books and journals (30.0 per cent); air passenger transport services (25.3 per cent), and alcohol and tobacco products (13.8 per cent). Table IV.5 presents the distribution of tourism expenditure by items of consumption.

Table IV.5: Internal Tourism Consumption by Items of Consumption (% Distribution)

Item	Inbound from other countries	Inbound from other states	Domestic	Outbound	Total
A.1. Tourism-characteristic Products/Services	59.7	87.8	70.4	37.3	79.1
1. Accommodation services/hotels	18.7	16.8	5.2	10.1	12.3
2 Food and beverage serving services/restaurants	9.3	26.8	17.5	13.3	22.1
3 Railway passenger transport services	0.1	1.1	0.1	2.3	0.6
4 Road passenger transport services	1.8	32.4	41.8	8.8	34.3
5 Water passenger transport services	0.0	0.0	0.0	0.0	0.0
6 Air passenger transport services	12.0	3.7	0.0	1.5	2.7
7 Transport equipment rental services	2.0	3.1	0.9	0.0	2.2
8 Travel agencies and other reservation services/supporting and auxiliary transport activities	0.0	0.8	0.1	0.1	0.5
9 Cultural and religious services	10.5	0.1	0.1	0.0	0.7
10 Sports and other recreational services	0.2	0.2	0.1	0.0	0.1
11 Health and medical-related services	5.1	2.9	4.6	1.2	3.7
A.2. Tourism-connected Products	40.3	12.2	29.6	62.7	20.9
12 Readymade garments	20.2	8.1	18.8	48.3	13.2
13 Processed food	0.1	1.4	2.9	2.7	2.0
14 Alcohol and tobacco products	1.9	0.6	0.8	3.6	0.8
15 Travel-related consumer goods	0.4	0.5	0.2	0.0	0.3
16 Footwear	5.9	0.8	4.7	0.0	2.6
17 Soaps, cosmetics, and glycerine	0.6	0.1	0.5	0.0	0.3
18 Gems and jewellery	9.2	0.5	1.5	3.0	1.4
19 Books, journals, magazines, stationery, etc.	1.8	0.2	0.3	5.1	0.3
Total expenditure	100.0	100.0	100.0	100.0	100.0

Source: NCAER computation using TSA Table 4.

Among the tourism products and services, the tourism-characteristic products/services form a large part of the total tourism consumption (79.1 per cent). In the case of inbound tourists from other States, this share is much higher at 87.8 per cent. On the other hand, in the case of outbound tourists, whose pre-trip expenses are taken into account, the share of tourism-connected products is higher, at 62.7 per cent, indicating that major expenses are incurred by them on shopping items.

Among the tourism-characteristic products and services, the major expenses were incurred on passenger transport services, across all the four forms of tourism. Similarly, among the tourism-connected products, readymade garments account for the most popular item of expenditure incurred by all types of tourists.

IV.7. Production Accounts of Tourism Industries

The production accounts of tourism industries and other industries in the economy of reference are presented in TSA Table 5. It conforms to the format established in the Systems of National Accounts (SNA) for production accounts.

The Gross Value Added (GVA) of all the tourism-characteristic and tourism-connected industries put together is referred to as Gross Value Added of Tourism Industries (GVATI). The GVATI, however, has a limited role as being a relevant indicator of tourism's contribution to the economy. This is because not all the gross value added of these industries are on account of tourism activity; part of it is on account of non-tourism too.

TSA Table 5, presented in SUT format, has products shown in rows and industries in columns. The output broken down by the product for each industry is valued at basic prices and occupies a block of rows in the upper part of the table. Then intermediate consumption (also called intermediate inputs) valued at purchasers' prices, if possible, is broken down again by the products for each industry, and presented in the second block of rows. The difference between these two values is the GVA at basic prices for the industries and is presented in the third block of the rows in the table.

In the columns in the table, the production accounts of the tourism-specific industries are presented and grouped according to the proposed classification. For each industry and for the total economy, the GVA at basic prices, that is the difference between the output at basic prices and intermediate consumption at purchasers' prices, has to be equal to the GVA of the economy as it appears in the national accounts.

As recommended, the production account for the TSA of the State has been prepared using the Supply and Use Table (SUT) framework. The latest SUT for tourism industries was prepared in the previous TSA of Uttarakhand for 2015-16.¹⁴ This has been updated for 2018-19 using the GSDP details of the State for 2018-19. These data form the control totals of all the rows and columns of both the Supply Table and Use Tables. The inter-industry transactions are derived using the SUT of 2015-16.

The production account is presented for 24 industries and 24 products. Of these, 19 industries are tourism-specific industries, for which the information on tourism consumption is available and presented in TSA Table 4; and the remaining 5 industries and products are tourism non-specific industries and products, which would, however, have linkages with tourism industries/products. *The 24X24 SUT for Uttarakhand is presented as TSA Table 5.*

¹⁴India: Regional Tourism Satellite Accounts, 2015-16, Uttarakhand, Report 20191202 (35), December 2019, NCAER.

TSA Table 5: Production Account of Tourism Industries - Supply Table - 2018-19

(Rs Lakh)

S. No.	Industry	Agriculture and allied	Mining, other manufacturing, construction, electricity, gas and water supply	Trade	Transport freight services	All non-tourism specific services	Accommodation services/Hotels
		1	2	3	4	5	6
1	Agriculture and allied	2,42,3289	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas, and water supply	26,849	2,66,42,720	0	0	69,19,147	0
3	Trade	0	5,60,429	39,79,748	0	0	0
4	Transport freight services	0	0	0	379597	0	0
5	All non-tourism specific services	0	41,027	40,915	0	72,73,656	0
6	Accommodation services/hotels	0	0	0	0	0	1,44,623
7	Food and beverage serving services/restaurants	0	0	0	0	0	5105
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	20395	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical-related services	0	0	0	0	0	0
17	Readymade garments	0	2707	0	0	0	0
18	Processed food	0	94,385	0	0	0	0
19	Alcohol and tobacco products	0	3679	0	0	0	0
20	Travel-related consumer goods	0	74,376	0	0	0	0
21	Footwear	0	5629	0	0	0	0
22	Soaps, cosmetics, and glycerine	0	5,04,725	0	0	0	0
23	Gems and jewellery	0	17,20,915	0	0	0	0
24	Books, journals, magazines, stationery, etc.	0	74,688	0	0	0	0
	Total value of output (Rs lakh)	24,50,138	2,97,25,280	40,20,663	399992	1,41,92,803	1,49,728

S. No.	Industry	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	Cultural and religious services	Sports and other recreational services	Health and medical related services	Readymade garments	Processed Food
		13	14	15	16	17	18
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas, and water supply	0	0	0	0	36,319	14,864
3	Trade	0	0	0	0	2708	38,849
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	0	0	0	0	12	239
6	Accommodation services/hotels	0	0	0	0	0	0
7	Food and beverage serving services/Restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	5820	0	0	0	0	0
14	Cultural and religious services	0	16,822	0	0	0	0
15	Sports and other recreational services	0	0	10,612	0	0	0
16	Health and medical-related services	0	0	0	3,56,190	0	0
17	Readymade garments	0	0	0	0	2,04,838	0
18	Processed food	0	0	0	0	0	1781066
19	Alcohol and tobacco products	0	0	0	0	0	5733
20	Travel-related consumer goods	0	0	0	0	2625	101
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics, and glycerine	0	0	0	0	0	6990
23	Gems and jewellery	0	0	0	0	0	0
24	Books, journals, magazines, stationery, etc.	0	0	0	0	0	0
	Total value of output (Rs lakh)	5820	16,822	10,612	3,56,190	2,46,501	1847841

Source: NCAER computations.

S. No.	Industry	Alcohol & Tobacco products	Travel related consumer goods	Footwear	Soaps, cosmetics and glycerine	Gems and jewellery	Books, journals, magazines, stationery etc.
		19	20	21	22	23	24
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas, and water supply	2364	65,956	53	4,86,085	46,218	8,85,691
3	Trade	2235	5928	8	10,641	3724	7346
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	352	4871	0	368	5386	362
6	Accommodation services/hotels	0	0	0	0	0	0
7	Food and beverage serving services/restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical-related services	0	0	0	0	0	0
17	Readymade garments	0	0	0	0	0	0
18	Processed food	2296	0	0	11,453	0	0
19	Alcohol and tobacco products	64,433	0	0	446	0	0
20	Travel-related consumer goods	0	46,599	136	474	2649	1194
21	Footwear	0	74,698	230	0	0	0
22	Soaps, cosmetics, and glycerine	2	0	0	59,557	0	0
23	Gems and jewellery	0	2,73,791	0	0	3,03,685	0
24	Books, journals, magazines, stationery, etc.	0	0	0	0	0	41321
	Total value of output (Rs lakh)	71,682	4,71,842	428	5,69,026	3,61,662	9,35,914

Source: NCAER computations.

S. No.	Industry	Total Domestic Supply at BP	Product taxes less Subsidies	Output at Producer price (OP)	Trade and Transport Margins (TTM)	Output at Purchaser's price (OP + TTM)
1	Agriculture and allied	24,23,289	-3,44,206	20,79,083	3,75,859	24,54,942
2	Mining, other manufacturing, construction, electricity, gas, and water supply	3,51,26,266	21,65,982	3,72,92,248	40,05,011	4,12,97,259
3	Trade	46,11,616	4671	46,16,287	-46,16,287	0
4	Transport freight services	4,82,922	31,957	5,14,879	-5,14,879	0
5	All non-tourism specific services	73,67,188	4,55,230	78,22,418	0	78,22,418
6	Accommodation services/hotels	1,81,903	1266	1,83,169	0	1,83,169
7	Food and beverage serving services/restaurants	7,00,058	5943	7,06,000	0	7,06,000
8	Railway passenger transport services	10,873	75	10,949	0	10,949
9	Road passenger transport services	5,51,650	15,674	5,67,325	0	5,67,325
10	Water passenger transport services	0	0	0	0	0
11	Air passenger transport services	38,133	2964	41097	0	41,097
12	Transport equipment rental services	44,714	15	44,729	0	44,729
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	5820	2014	7835	0	7835
14	Cultural and religious services	16,822	-11	16,811	0	16,811
15	Sports and other recreational services	10,612	33,732	44,344	0	44,344
16	Health and medical-related services	3,56,190	-1184	3,55,007	0	3,55,007
17	Readymade garments	2,07,545	26,023	2,33,568	26,197	2,59,765
18	Processed food	18,89,200	93,645	19,82,845	4,84,511	24,67,356
19	Alcohol and tobacco products	74,292	1,61,977	236269	29,687	2,65,957
20	Travel-related consumer goods	1,28,154	9312	137466	21,599	1,59,065
21	Footwear	80,557	6036	86593	11,177	97,770
22	Soaps, cosmetics, and glycerine	5,71,274	35,753	607027	83,778	6,90,804
23	Gems and jewellery	22,98,390	17,391	2315781	76,442	23,92,224
24	Books, journals, magazines, stationery, etc.	1,16,009	843	116851	16,905	1,33,756
	Total value of output (Rs lakh)	5,72,93,478	27,25,102	60018580	0	6,00,18,580

Source: NCAER computations.

TSA Table 5: Production Account of Tourism Industries - Supply Table - 2018-19

(Rs Lakh)

S. No.	Industry	Industry as per the Serial No. given in first column					
		1	2	3	4	5	6
1	Agriculture and allied	2,50,162	5,75,300	0	5713	2,50,291	48,458
2	Mining, other manufacturing, construction, electricity, gas, and water supply	1,21,095	1,98,43,604	6,20,230	1,38,394	45,25,735	9165
3	Trade	0	0	0	0	0	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	36,744	4,62,456	2,51,150	59,839	16,38,207	4530
6	Accommodation services/Hotels	382	175	13,317	759	23,479	15
7	Food and beverage serving services/restaurants	1513	821	62,506	3563	1,10,202	69
8	Railway passenger transport services	0	4011	943	10	3719	1
9	Road passenger transport services	23,091	30,711	65,959	85	58,771	55
10	Water passenger transport services	0	0	1660	3	6603	0
11	Air passenger transport services	0	11,794	8581	126	59,069	14
12	Transport equipment rental services	4	4220	279	35	1197	1
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	0	0	13,596	332	7649	60
14	Cultural and religious services	0	0	0	0	11	0
15	Sports and other recreational services	590	767	1519	148	4016	254
16	Health and medical service	1	0	0	0	448	0
17	Readymade garments	1109	4473	3726	2308	27,618	116
18	Processed food	79,108	36,449	282	0	1,11,228	31,852
19	Alcohol and tobacco products	0	4744	0	0	4107	2983
20	Travel-related consumer goods	717	23,637	2030	309	13,481	13
21	Footwear	0	0	0	0	249	0
22	Soaps, cosmetics, and glycerine	0	27,011	2644	0	418	1044
23	Gems and jewellery	0	9,86,229	0	0	0	0
24	Books, journals, magazines, stationery, etc.	3318	9358	2162	1724	22,454	6
	Total IIUSE at PP	5,17,834	2,20,25,762	10,50,583	2,13,349	68,68,951	98,636
	Output at BP	24,50,138	2,97,25,280	40,20,663	3,99,992	1,41,92,803	1,49,728
	GVA	19,32,304	76,99,519	29,70,079	1,86,642	73,23,851	51,092

Source: NCAER computations.

S. No.	Industry	Industry as per the Serial No. Given in the First Column					
		7	8	9	10	11	12
1	Agriculture and allied	236979	0	10610	0	0	0
2	Mining, other manufacturing, construction, electricity, gas, and water supply	44822	2708	227556	0	18982	7981
3	Trade	0	0	0	0	0	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	22156	599	101870	0	7289	4347
6	Accommodation services/Hotels	71	14	1242	0	115	22
7	Food and beverage serving services/restaurants	336	66	5828	0	541	102
8	Railway passenger transport services	7	0	8	0	3	0
9	Road passenger transport services	267	0	3	0	1	410
10	Water passenger transport services	2	0	2	0	1	0
11	Air passenger transport services	67	1	76	0	30	0
12	Transport equipment rental services	3	0	65	0	2	12
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	293	0	318	0	0	456
14	Cultural and religious services	1	0	0	0	0	0
15	Sports and other recreational services	1243	21	74	0	83	241
16	Health and medical-related services	0	0	0	0	0	0
17	Readymade garments	566	114	2923	0	1214	243
18	Processed food	1,55,769	0	0	0	0	0
19	Alcohol and tobacco products	14,589	0	0	0	0	0
20	Travel-related consumer goods	64	12	442	0	102	110
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics, and glycerine	5106	0	0	0	0	0
23	Gems and jewellery	0	0	0	0	0	0
24	Books, journals, magazines, stationery, etc.	31	134	1818	0	1003	239
	Total IIUSE at PP	4,82,372	3668	3,52,834	0	29,365	14,162
	Output at BP	7,32,233	10,873	6,34,580	0	38,133	44,714
	GVA	2,49,861	7205	2,81,746	0	8768	30,552

Source: NCAER computations.

S. No.	Industry	Industry as per the Serial No. Given in the First Column					
		13	14	15	16	17	18
1	Agriculture and allied	0	0	0	0	0	14,05,419
2	Mining, other manufacturing, construction, electricity, gas, and water supply	1659	4790	852	1,19,924	1,46,703	22,325
3	Trade	0	0	0	0	0	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	993	519	3353	12,569	4568	3738
6	Accommodation services/Hotels	12	16	5	35	0	0
7	Food and beverage serving services/restaurants	57	76	25	165	0	0
8	Railway passenger transport services	3	18	13	0	108	81
9	Road passenger transport services	45	41	113	41	637	400
10	Water passenger transport services	1	4	3	25	0	0
11	Air passenger transport services	43	33	19	917	0	0
12	Transport equipment rental services	0	1	3	0	33	32
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	86	39	24	3	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	8	15	114	188	0	0
16	Health and medical-related services	0	0	1	1160	0	0
17	Readymade garments	82	116	29	550	1909	0
18	Processed food	0	0	0	0	0	80,647
19	Alcohol and tobacco products	0	0	0	0	0	173
20	Travel-related consumer goods	7	63	8	11	11,240	28
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics, and glycerine	0	0	0	0	50	0
23	Gems and jewellery	0	0	0	0	3	0
24	Books, journals, magazines, stationery, etc.	56	28	28	194	251	6
	Total IIUSE at PP	3053	5760	4590	1,35,784	1,65,503	15,12,849
	Output at BP	5820	16,822	10,612	3,56,190	2,46,501	18,47,841
	GVA	2768	11,062	6023	2,20,407	80,998	3,34,993

Source: NCAER Computations.

S. No.	Industry	Industry as per the Serial No. Given in the First Column					
		19	20	21	22	23	24
1	Agriculture and allied	42805	86257	264	13666	8	94454
2	Mining, other manufacturing, construction, electricity, gas, and water supply	2776	83058	24	419384	78825	608764
3	Trade	0	0	0	0	0	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	150	1539	2	5646	813	18428
6	Accommodation services/Hotels	0	0	0	0	0	0
7	Food and beverage serving services/restaurants	0	0	0	0	0	0
8	Railway passenger transport services	3	33	0	69	3	339
9	Road passenger transport services	11	144	0	309	7	1284
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	1	22	0	27	1	108
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	7	0	0
16	Health and medical-related services	0	0	0	0	0	0
17	Readymade garments	0	63	0	0	0	19
18	Processed food	1081	0	0	2587	0	0
19	Alcohol and tobacco products	546	0	0	279	0	0
20	Travel-related consumer goods	1	4204	12	36	398	262
21	Footwear	0	183	1	0	0	0
22	Soaps, cosmetics, and glycerine	0	0	0	3147	0	0
23	Gems and jewellery	0	2,22,200	0	0	2,46,461	0
24	Books, journals, magazines, stationery, etc.	3	5	0	63	0	3283
	Total IIUSE at PP	47377	3,97,708	302	4,45,220	3,26,516	7,26,941
	Output at BP	71,682	4,71,842	428	5,69,026	3,61,662	9,35,914
	GVA	24,305	74,134	125	1,23,806	35,146	2,08,973

Source: NCAER computations.

S. No.	Industry	IIUSE	TFUSE	Total Use
1	Agriculture and allied	30,20,387	-5,65,445	24,54,942
2	Mining, other manufacturing, construction, electricity, gas, and water supply	270,49,353	1,42,47,906	4,12,97,259
3	Trade	0	0	0
4	Transport freight services	0	0	0
5	All non-tourism specific services	26,41,505	51,80,912	78,22,418
6	Accommodation services/hotels	39,659	1,43,510	1,83,169
7	Food and beverage serving services/restaurants	1,85,871	5,20,130	7,06,000
8	Railway passenger transport services	9374	1575	10,949
9	Road passenger transport services	1,82,385	3,84,940	5,67,325
10	Water passenger transport services	8303	-8303	0
11	Air passenger transport services	80,770	-39,673	41,097
12	Transport equipment rental services	6045	38,684	44,729
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	22,856	-15,021	7835
14	Cultural and religious services	14	16,797	16,811
15	Sports and other recreational services	9290	35,055	44,344
16	Health and medical-related services	1611	3,53,396	3,55,007
17	Readymade garments	47,177	2,12,588	2,59,765
18	Processed food	4,99,003	19,68,353	24,67,356
19	Alcohol and tobacco products	27,421	2,38,536	2,65,957
20	Travel-related consumer goods	57,186	1,01,879	1,59,065
21	Footwear	432	97,338	97,770
22	Soaps, cosmetics, and glycerine	39,420	6,51,385	6,90,804
23	Gems and jewellery	14,54,894	9,37,329	23,92,224
24	Books, journals, magazines, stationery, etc.	46,165	87,591	1,33,756
	Total IIUSE at PP	3,54,29,119	2,45,89,460	6,00,18,580
	Output at BP	57,293,478		
	GVA	2,18,64,359		

Source: NCAER computations.

Table IV.6 summarises the production account, as given in TSA Table 5. This table shows that of the total GSVA of the State, at Rs 2,18,644 crore, the GVA accounted for by the tourism industries, that is GVATI, stood at Rs 17,520 crore. This amounts to 8.0 per cent of the total GSVA. The State's industrial sector (excluding tourism-specific manufactured products) accounts for the maximum, at 35.2 per cent. Non-tourism specific services contribute 33.5 per cent to the GSVA. The third highest contributor is trade, accounting for 13.6 per cent of the GSVA.

Table IV.6: Economic Aggregates of Industries

S. No.	Industry	Gross Value of Output (Rs lakh)	GVA (Rs lakh)	Share in Total GVA (%)
1	Agriculture and allied	24,50,138	19,32,304	8.8
2	Mining, other manufacturing, construction, electricity, gas, and water supply	2,97,25,280	76,99,519	35.2
3	Trade	40,20,663	29,70,079	13.6
4	Transport freight services	3,99,992	1,86,642	0.9
5	All non-tourism specific services	1,41,92,803	73,23,851	33.5
6	Accommodation services/hotels	1,49,728	51,092	0.2
7	Food and beverage serving services/restaurants	7,32,233	2,49,861	1.1
8	Railway passenger transport services	10,873	7205	0.0
9	Passenger transport services	6,34,580	2,81,746	1.3
10	Water passenger transport services	0	0	0.0
11	Air passenger transport services	38,133	8768	0.0
12	Transport equipment rental services	44,714	30,552	0.1
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	5820	2768	0.0
14	Cultural and religious services	16,822	11,062	0.1
15	Sports and other recreational services	10,612	6023	0.0
16	Health and medical related services	3,56,190	2,20,407	1.0
17	Readymade garments	2,46,501	80,998	0.4
18	Processed food	18,47,841	3,34,993	1.5
19	Alcohol and tobacco products	71,682	24,305	0.1
20	Travel-related consumer goods	4,71,842	74,134	0.3
21	Footwear	428	125	0.0
22	Soaps, cosmetics, and glycerine	5,69,026	1,23,806	0.6
23	Gems and jewellery	3,61,662	35,146	0.2
24	Books, journals, magazines, stationery, etc.	9,35,914	2,08,973	1.0
	Total – all industries	5,72,93,478	2,18,64,359	100
	Total tourism-specific industries (tourism-characteristic and tourism-connected)	65,04,603	17,51,964	8.0

Source: NCAER computation using TSA Table 5.

IV.8. Tourism Industry Ratios and TDGVA

The most crucial table in a TSA is TSA Table 6, which is the core of the TSA system.

Using the results of TSA Table 6, estimates can be derived regarding the Gross Value Added attributable to tourism for each of the domestic industries that serve visitors. This provides the basic information necessary for the computation of tourism ratios for products and industries, Tourism Direct Gross Value Added (TGDVA) and Tourism Direct Gross Domestic Product (TDGDP) and their components. The table, together with the associated Use Table, provides a basis to compile input-output tables and input-output models that facilitate estimation of the indirect contribution of tourism to the economy.

After comparison of the demand-side and supply-side data, the Tourism Product Ratios (TPRs) are derived for each of the 24 product categories. By definition, the TPR is that proportion of the total supply of a product which is consumed by the tourists or is on account of tourism activity.

These TPRs, when applied to each industry column of the supply table, yield the Tourism Industry Ratios (TIRs) for each of the 24 industry categories. Using these ratios, estimates can be derived regarding the GVA attributable to tourism for each of the domestic industries that serve visitors.

However, due to non-availability of State-level trade data, the state Supply Table presents only domestic supply. In order to derive the total supply (inclusive of imports), the share of State domestic supply in India's domestic supply is applied on India's total supply. This is based on the assumption that the share of a State in India's total supply is the same as its share in India's domestic supply.

In the case of the Use Table, final demand is kept as a single aggregate column vector. By doing this, the TPRs for all products are derived by comparing the total supply of each product with the total tourism consumption of that product. These TPRs are applied on each industry column to derive the TIRs. These ratios bring out the tourism component from each industry's GVA, hence arriving at the Total Tourism Direct GVA (TDGVA). The share of TDGVA to the total State GVA is the contribution of tourism to the State's economy.

TSA Table 6 is presented below.

TSA Table 6: Domestic Supply and Internal Tourism Consumption (Rs Lakh)

S. No.	Industry	Agriculture and allied	TS*	Mining, other manufacturing, construction, electricity, gas and water supply	TS*	Trade	TS*
		1		2		3	
1	Agriculture and allied	2423289	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas, and water supply	26849	0	26642720	0	0	0
3	Trade	0	0	560429	0	3979748	16742
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	0	0	41027	2253	40915	2247
6	Accommodation services/hotels	0	0	0	0	0	0
7	Food and beverage serving services/restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical-related services	0	0	0	0	0	0
17	Readymade garments	0	0	2707	0	0	0
18	Processed food	0	0	94385	0	0	0
19	Alcohol and tobacco products	0	0	3679	0	0	0
20	Travel-related consumer goods	0	0	74376	0	0	0
21	Footwear	0	0	5629	0	0	0
22	Soaps, cosmetics, and glycerine	0	0	5,04,725	0	0	0
23	Gems and jewellery	0	0	17,20,915	0	0	0
24	Books, journals, magazines, stationery, etc.	0	0	74,688	0	0	0
	Total value of output (Rs lakh)	24,50,138	0	2,97,25,280	2253	40,20,663	18,989
	Intermediate consumption (Rs lakh)	517834	0	220,25,762	1670	10,50,583	4962
	GVA (Rs lakh)	1932304	0	76,99,519	584	29,70,079	14,027
	Tourism Industry Ratios (%)		0		0.00758		0.472282

Source: NCAER computations.

Note: S*: Tourism Share.

S. No.	Industry	Transport freight services	TS*	All non-tourism specific services	TS*	Accommodation services/Hotels	TS*
		4		5		6	
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas, and water supply	0	0	69,19,147	0	0	0
3	Trade	0	0	0	0	0	0
4	Transport freight services	3,79,597	0	0	0	0	0
5	All non-tourism specific services	0	0	72,73,656	3,99,473	0	0
6	Accommodation services/hotels	0	0	0	0	1,44,623	1,29,439
7	Food and beverage serving services/restaurants	0	0	0	0	5105	2134
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	20,395	16,512	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical-related services	0	0	0	0	0	0
17	Readymade garments	0	0	0	0	0	0
18	Processed food	0	0	0	0	0	0
19	Alcohol and tobacco products	0	0	0	0	0	0
20	Travel-related consumer goods	0	0	0	0	0	0
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics, and glycerine	0	0	0	0	0	0
23	Gems and jewellery	0	0	0	0	0	0
24	Books, journals, magazines, stationery, etc.	0	0	0	0	0	0
	Total value of output (Rs lakh)	3,99,992	16,512	1,41,92,803	3,99,473	1,49,728	1,31,573
	Intermediate consumption (Rs lakh)	2,13,349	8807	68,68,951	1,93,335	98,636	86,676
	GVA (Rs lakh)	1,86,642	7705	73,23,851	2,06,138	51,092	44,897
	Tourism Industry Ratios (%)		4.13		2.81		87.87

Source: NCAER computations.

Note: TS*: Tourism Share.

S. No.	Industry	Food and beverage serving services/Restaurants	TS*	Railway passenger transport services	TS*	Road passenger transport services	TS*
		7		8		9	
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	0	0	0	0	0	0
3	Trade	0	0	0	0	0	0
4	Transport freight services	0	0	0	0	1,03,325	0
5	All non-tourism specific services	0	0	0	0	0	0
6	Accommodation services/Hotels	37,280	33,366	0	0	0	0
7	Food and beverage serving services/restaurants	6,94,953	2,90,533	0	0	0	0
8	Railway passenger transport services	0	0	10,873	8393	0	0
9	Road passenger transport services	0	0	0	0	5,31,255	4,30,112
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical related services	0	0	0	0	0	0
17	Readymade garments	0	0	0	0	0	0
18	Processed food	0	0	0	0	0	0
19	Alcohol and tobacco products	0	0	0	0	0	0
20	Travel-related consumer goods	0	0	0	0	0	0
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics, and glycerine	0	0	0	0	0	0
23	Gems and jewellery	0	0	0	0	0	0
24	Books, journals, magazines, stationery, etc.	0	0	0	0	0	0
	Total value of output (Rs lakh)	7,32,233	3,23,899	10,873	8393	6,34,580	4,30,112
	Intermediate consumption (Rs lakh)	4,82,372	2,13,375	3668	2832	3,52,834	2,39,147
	GVA (Rs lakh)	2,49,861	1,10,525	7205	5562	2,81,746	1,90,965
	Tourism Industry Ratios (%)		44.2		77.2		67.8

Source: NCAER computations.

Note: TS*: Tourism Share.

S. No.	Industry	Water passenger transport services	TS*	Air passenger transport services	TS*	Transport equipment rental services	TS*
		10		11		12	
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas, and water supply	0	0	0	0	0	0
3	Trade	0	0	0	0	0	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	0	0	0	0	0	0
6	Accommodation services/hotels	0	0	0	0	0	0
7	Food and beverage serving services/restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	38133	33204	0	0
12	Transport equipment rental services	0	0	0	0	44714	28884
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical-related services	0	0	0	0	0	0
17	Readymade garments	0	0	0	0	0	0
18	Processed food	0	0	0	0	0	0
19	Alcohol and tobacco products	0	0	0	0	0	0
20	Travel-related consumer goods	0	0	0	0	0	0
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics, and glycerine	0	0	0	0	0	0
23	Gems and jewellery	0	0	0	0	0	0
24	Books, journals, magazines, stationery, etc.	0	0	0	0	0	0
	Total value of output (Rs lakh)	0	0	38133	33204	44714	28884
	Intermediate consumption (Rs lakh)	0	0	29365	25569	14162	9148
	GVA (Rs lakh)	0	0	8768	7635	30552	19735
	Tourism Industry Ratios (%)		0.0		87.1		64.6

Source: NCAER computations.

Note: TS*: Tourism Share.

S. No.	Industry	Travel agencies and other reservation services/	TS*	Cultural and religious services	TS*	Sports and other recreational services	TS*
		13		14		15	
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas, and water supply	0	0	0	0	0	0
3	Trade	0	0	0	0	0	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	0	0	0	0	0	0
6	Accommodation services/hotels	0	0	0	0	0	0
7	Food and beverage serving services/restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	5820	4797	0	0	0	0
14	Cultural and religious services	0	0	16822	8990	0	0
15	Sports and other recreational services	0	0	0	0	10612	430
16	Health and medical related services	0	0	0	0	0	0
17	Readymade garments	0	0	0	0	0	0
18	Processed food	0	0	0	0	0	0
19	Alcohol and tobacco products	0	0	0	0	0	0
20	Travel related consumer goods	0	0	0	0	0	0
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics, and glycerine	0	0	0	0	0	0
23	Gems and jewellery	0	0	0	0	0	0
24	Books, journals, magazines, stationery, etc.	0	0	0	0	0	0
	Total value of output (Rs lakh)	5820	4797	16822	8990	10612	430
	Intermediate consumption (Rs lakh)	3053	2516	5760	3078	4590	186
	GVA (Rs lakh)	2768	2281	11062	5912	6023	244
	Tourism Industry Ratios (%)		82.41		53.44		4.05

Source: NCAER computations.

Note: TS*: Tourism Share.

S. No.	Industry	Health and medical related services	TS*	Readymade garments	TS*	Processed Food	TS*
		16		17		18	
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas, and water supply	0	0	36,319	0	14,864	0
3	Trade	0	0	2708	0	38,849	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	0	0	12	1	239	13
6	Accommodation services/hotels	0	0	0	0	0	0
7	Food and beverage serving services/restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical-related services	3,56,190	50,017	0	0	0	0
17	Readymade garments	0	0	2,04,838	0	0	0
18	Processed food	0	0	0	0	17,81,066	0
19	Alcohol and tobacco products	0	0	0	0	5733	0
20	Travel-related consumer goods	0	0	2625	0	101	0
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics, and glycerine	0	0	0	0	6990	0
23	Gems and jewellery	0	0	0	0	0	0
24	Books, journals, magazines, stationery, etc.	0	0	0	0	0	0
	Total value of output (Rs lakh)	3,56,190	50,017	2,46,501	1	18,47,841	13
	Intermediate consumption (Rs lakh)	1,35,784	19,067	1,65,503	0	15,12,849	11
	GVA (Rs. Lakh)	2,20,407	30,950	80,998	0	3,34,993	2
	Tourism Industry Ratios (%)		14.0423		0.0003		0.0007

Source: NCAER computations.

Note: TS*: Tourism Share.

S. No.	Industry	Alcohol & Tobacco products	TS*	Travel related consumer goods	TS*	Footwear	TS*
		19		20		21	
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas, and water supply	2364	0	65,956	0	53	0
3	Trade	2235	0	5928	0	8	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	352	19	4871	267	0	0
6	Accommodation services/hotels	0	0	0	0	0	0
7	Food and beverage serving services/restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical-related services	0	0	0	0	0	0
17	Readymade garments	0	0	0	0	0	0
18	Processed food	2296	0	0	0	0	0
19	Alcohol and tobacco products	64,433	0	0	0	0	0
20	Travel-related consumer goods	0	0	46,599	0	136	0
21	Footwear	0	0	74,698	0	230	0
22	Soaps, cosmetics, and glycerine	2	0	0	0	0	0
23	Gems and jewellery	0	0	2,73,791	0	0	0
24	Books, journals, magazines, stationery, etc.	0	0	0	0	0	0
	Total value of output (Rs lakh)	71,682	19	4,71,842	267	428	0
	Intermediate consumption (Rs lakh)	47,377	13	3,97,708	225	302	0
	GVA (Rs lakh)	24,305	6.6	74133.6	42.0	125.2	0.001
	Tourism Industry Ratios (%)		0.03		0.06		0.00

Source: NCAER computations.

Note: TS*: Tourism Share.

S. No.	Industry	Soaps, cosmetics and glycerine	TS*	Gems and jewellery	TS*	Books, journals, magazines, stationery etc.	TS*
		22		23		24	
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas, and water supply	4,86,085	0	46,218	0	8,85,691	0
3	Trade	10,641	0	3724	0	7346	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	368	20	5386	296	362	20
6	Accommodation services/hotels	0	0	0	0	0	0
7	Food and beverage serving services/restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical-related services	0	0	0	0	0	0
17	Readymade garments	0	0	0	0	0	0
18	Processed food	11,453	0	0	0	0	0
19	Alcohol and tobacco products	446	0	0	0	0	0
20	Travel-related consumer goods	474	0	2649	0	1194	0
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics, and glycerine	59,557	0	0	0	0	0
23	Gems and jewellery	0	0	3,03,685	0	0	0
24	Books, journals, magazines, stationery, etc.	0	0	0	0	41,321	0
	Total value of output (Rs lakh)	5,69,026	20	3,61,662	296	9,35,914	20
	Intermediate consumption (Rs lakh)	4,45,220	16	3,26,516	267	7,26,941	15
	GVA (Rs lakh)	1,23,806	4	35,146	29	2,08,973	4
	Tourism Industry Ratios (%)		0.004		0.082		0.002

Source: NCAER computations.

Note: TS*: Tourism Share.

S. No.	Industry	Total Domestic Supply at BP	TS*	Product taxes less Subsidies	TS*	Output at Producer price (OP)	TS*
1	Agriculture and allied	24,23,289	0	-3,44,206	0	20,79,083	0
2	Mining, other manufacturing, construction, electricity, gas, and water supply	3,51,26,266	0	21,65,982	0	3,72,92,248	0
3	Trade	46,11,616	16,742	4671	0	46,16,287	16,742
4	Transport freight services	4,82,922	0	31,957	0	5,14,879	0
5	All non-tourism specific services	73,67,188	4,04,610	4,55,230	25,001	78,22,418	4,29,611
6	Accommodation services/hotels	1,81,903	1,62,805	1266	1133	1,83,169	1,63,938
7	Food and beverage serving services/restau-rants	7,00,058	2,92,668	5943	2484	7,06,000	2,95,152
8	Railway passenger transport services	10,873	8393	75	58	10,949	8451
9	Road passenger transport services	5,51,650	4,46,624	15,674	12,690	5,67,325	4,59,315
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	38,133	33,204	2964	2581	41,097	35,784
12	Transport equipment rental services	44,714	28,884	15	10	44,729	28,893
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	5820	4797	2014	1660	7835	6457
14	Cultural and religious services	16,822	8990	-11	-6	16,811	8984
15	Sports and other recreational services	10,612	430	33,732	1367	44,344	1797
16	Health and medical-related services	356190	50017	-1184	-166	3,55,007	49,851
17	Readymade garments	207545	0	26,023	17,632	2,33,568	17,632
18	Processed food	18,89,200	0	93,645	991	19,,82,845	991
19	Alcohol and tobacco products	74,292	0	1,61,977	6258	2,36,269	6258
20	Travel-related consumer goods	1,28,154	0	9312	273	1,37,466	273
21	Footwear	80,557	0	6036	2188	86,593	2188
22	Soaps, cosmetics, and glycerine	5,71,274	„0	35,753	185	6,07,027	185
23	Gems and jewellery	22,98,390	0	17,391	133	23,15,781	133
24	Books, journals, magazines, stationery, etc.	1,16,009	0	843	29	1,16,851	29
	Total value of output (Rs lakh)	5,72,93,478	14,58,163	27,25,102	74,502	6,00,18,580	15,32,665
	Intermediate consumption (Rs lakh)	3,54,29,119	8,10,916				
	GVA (Rs lakh)	2,18,64,359	6,47,248				
	Tourism Industry Ratios (%)		2.96				

Source: NCAER computations.

Note: TS*: Tourism Share.

S. No.	Industry	Trade and Transport Margins (TTM)	TS*	Output at Purchaser's price (OP + TTM)	TS*
1	Agriculture and allied	3,75,859.27	0	24,54,942.17	0
2	Mining, other manufacturing, construction, electricity, gas, and water supply	40,05,011.3	0	4,12,97,259	0
3	Trade	-46,16,286.8	-16,741.8	0	0
4	Transport freight services	-5,14,879.07	0	0	0
5	All non-tourism specific services	0	0	78,22,417.55	4,29,611.1
6	Accommodation services/hotels	0	0	1,83,168.989	1,63,938
7	Food and beverage serving services/restaurants	0	0	7,06,000.331	2,95,152.1
8	Railway passenger transport services	0	0	10,948.8523	8451.332
9	Road passenger transport services	0	0	5,67,324.67	4,59,314.6
10	Water passenger transport services	0	0	0.001	0
11	Air passenger transport services	0	0	41,096.5361	35,784.4
12	Transport equipment rental services	0	0	44,729.0286	28,893.4
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	0	0	7834.72168	6456.794
14	Cultural and religious services	0	0	16,810.9775	8984.142
15	Sports and other recreational services	0	0	44,344.0687	1797.311
16	Health and medical-related services	0	0	3,55,006.514	49,851.15
17	Readymade garments	26,196.86	3570.709	2,59,764.527	21,202.95
18	Processed food	4,84,511.05	3943.966	24,67,356.25	4934.625
19	Alcohol and tobacco products	29,687.402	1963.877	2,65,956.547	8222.077
20	Travel related consumer goods	21,598.826	681.3188	1,59,064.948	954.7063
21	Footwear	11,176.611	5009.258	97,770.1074	7197.145
22	Soaps, cosmetics, and glycerine	83,777.595	670.93	6,90,804.297	855.4615
23	Gems and jewellery	76,442.367	374.5595	23,92,223.7	507.2327
24	Books, journals, magazines, stationery, etc.	16,904.653	527.2104	1,33,756.005	556.437
	Total value of output (Rs lakh)	-1.251E-09	-1.6E-12	6,00,18,579.8	15,32,665
	Intermediate consumption (Rs lakh)				
	GVA (Rs lakh)				
	Tourism Industry Ratios (%)			6,73,40,892.6	

Source: NCAER computations.

Note: TS*: Tourism Share.

Table IV.7 summarises the TSA Table 6 and presents the share of TDGVA in the State total GVA.

Table IV.7: Total Supply, Tourism Consumption and TDGVA

S. No.	Industry	Total Supply (Rs. Lakh)	Adjusted Tourism Consumption (Rs. Lakh)	Tourism Product Ratio (%)	Tourism Industry Ratio (%)	GVA (Rs. Lakh)	TDGVA (Rs. Lakh)
1	Agriculture and allied	27,54,447	0	0.0	0.00	19,32,304	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	4,63,35,556	0	0.0	0.01	76,99,519	584
3	Trade	0	0	0.0	0.47	29,70,079	14,027
4	Transport freight services	0	0	0.0	4.13	1,86,642	7705
5	All non-tourism specific services	87,76,759	4,82,024	5.5	2.81	73,23,851	2,06,138
6	Accommodation services/hotels	2,05,516	1,83,939	89.5	87.87	51,092	44,897
7	Food and beverage serving services/restaurants	7,92,133	3,31,161	41.8	44.23	2,49,861	1,10,525
8	Railway passenger transport services	12,285	9482	77.2	77.19	7205	5562
9	Road passenger transport services	6,36,539	5,15,351	81.0	67.78	2,81,746	1,90,965
10	Water passenger transport services	0	0	0.0	0.00	0	0
11	Air passenger transport services	46,110	40,150	87.1	87.07	8768	7635
12	Transport equipment rental services	50,186	32,418	64.6	64.60	30,552	19,735
13	Travel agencies and other reservation services/supporting and auxiliary transport activities	8791	7245	82.4	82.41	2768	2281
14	Cultural and religious services	18,862	10,080	53.4	53.44	11,062	5912
15	Sports and other recreational services	49,754	2017	4.1	4.05	6023	244
16	Health and medical-related services	3,98,318	55,933	14.0	14.04	2,20,407	30,950
17	Readymade garments	2,91,456	1,97,482	67.8	0.00	80,998	0
18	Processed food	27,68,376	29,286	1.1	0.00	3,34,993	2
19	Alcohol and tobacco products	2,98,403	11,529	3.9	0.03	24,305	7
20	Travel-related consumer goods	1,78,471	5240	2.9	0.06	74,134	42
21	Footwear	1,09,698	39,761	36.2	0.00	125	0
22	Soaps, cosmetics, and glycerine	7,75,083	4000	0.5	0.00	1,23,806	4
23	Gems and jewellery	26,84,077	20,476	0.8	0.08	35,146	29
24	Books, journals, magazines, stationery, etc.	1,50,074	5206	3.5	0.00	2,08,973	4
	Total	6,73,40,893	19,82,780	2.9	2.96	2,18,64,359	6,47,248

Source: NCAER computation using TSA Table 6.

The key outcome of TSA Table 6 is the tourism ratios. The TPR is the highest for accommodation services, at 89.5 per cent. This means that of the total output of this service, 89.5 per cent is consumed by tourists and is, therefore, on account of tourism activities. Other goods and services

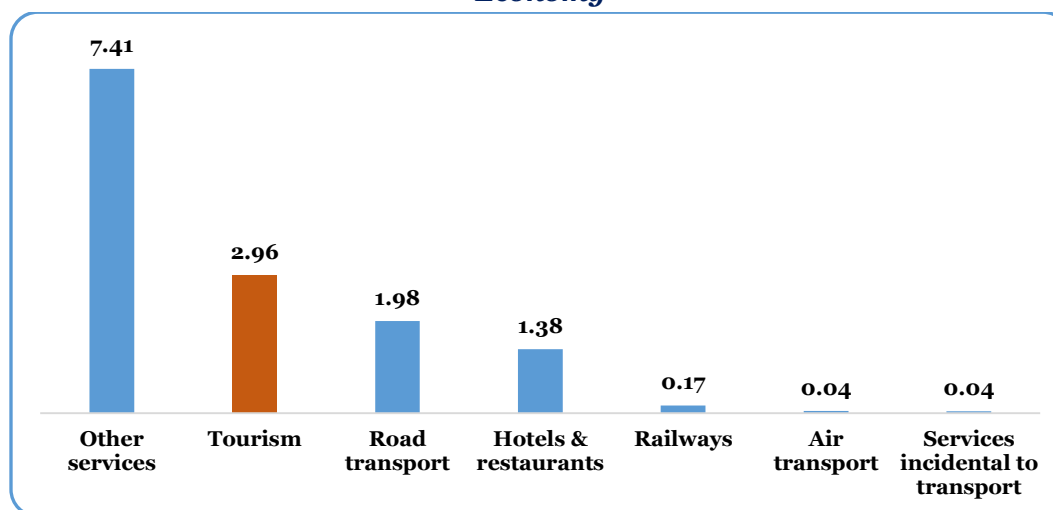
that are highly dependent on tourism activities are air passenger transport services, travel agents and reservation services, and road passenger transport services. This is the reason that all these fall under tourism-characteristic goods and services. Among tourism-connected goods, the TPR, estimated at 67.8 per cent, is notably high for readymade garments.

For these goods and services, the TIRs are also significantly high. However, in the case of tourism-connected industries, only the activity by which they are made available to visitors generates tourism direct value added. Hence, only the associated retail trade margin generates a share. Consequently, in the case of goods, the values of tourism shares are very small, as compared to the total supply. Hence, in such cases, the TIRs are very small and almost equal to zero.

The summation of tourism components extracted from each industry, through TIRs, form the Tourism Direct Gross Value Added (TDGVA). This TDGVA for the Uttarakhand economy is estimated at Rs 6472.5 crore, which translates into 2.96 per cent of the total GSVA. This is the direct share of tourism in the State GVA.

Since tourism is largely a component of service industries like accommodation and passenger transport, it is worth comparing its share with the shares of these industries, as given in the GSVA statement. Figure IV.13 compares these GVA figures.

Figure IV.13: Shares of TDGVA and GVA of Other Service Industries in the Total State Economy



Source: NCAER computation.

IV.9. Tourism Employment

TSA Table 7 presents the employment situation in tourism industries in the economy of reference. According to TSA: RMF 2008, “seasonality, high variability in the working

conditions, flexibility, and the informality of jobs in several small units are the major challenges in collecting data on employment in tourism industries”.

Further, labour is a factor of production and is generally associated with an establishment wherein various products are produced. Therefore, relating employment to a specific product or group of products of a given establishment is a complex issue in measuring tourism direct employment.

For this reason, tourism employment, referring to the employment strictly related to the goods and services (tourism-characteristic, tourism-connected, and other) acquired by visitors and produced by either tourism industries or other industries cannot be assessed directly.

Hence, it is recommended that employment in tourism-characteristic industries should be restricted as the direct tourism employment. For TSAs for India and its States, TSA Table 7 presents the total number of jobs (one employed person can take up more than one job, with the second being of a subsidiary nature). The table also distinguishes jobs in tourism industries by the nature of employment, that is, between the self-employed and employees.

The data on employment for 2018-19 have been sourced from the Periodic Labour Force Survey (PLFS) conducted by the National Sample Survey Office (NSSO). The PLFS is conducted on an annual basis and, so far, two rounds of the PLFS have been conducted. The primary objective of PLFS is to estimate the key employment and unemployment indicators, viz., the Worker Population Ratio, Labour Force Participation Rate, and Unemployment Rate, for rural and urban areas.

Regarding the sample size of the nationally conducted PLFS, out of the total number of 12,800 first-stage units, including 7,024 villages and 5,776 UFS blocks, allotted for the survey at the all-India level during the period July 2018-June 2019, a total of 12,720 FSUs, including 6,983 villages and 5,737 urban blocks, were surveyed for canvassing the PLFS schedule. The total number of households surveyed was 1,01,579, including 55,812 in rural areas and 45,767 in urban areas, whereas the number of persons surveyed was 4,20,757, including 2,39,817 in rural areas and 1,80,940 in urban areas.

In order to estimate the tourism employment for Uttarakhand, the data on the number of jobs by 5-digit NIC codes were extracted from the PLFS unit-level data. These NIC codes were mapped with the tourism-characteristic industries and the corresponding number of jobs was obtained by aggregating the values against each NIC code.

Given the under-estimation of the population and the estimated number of jobs in the NSS surveys, the derived employment was adjusted for the actual projected population for the State. TSA Table 7, so obtained, is presented below.

TSA Table 7: Tourism Direct Employment by Work Status

	Number of Jobs		
	Self-employed	Employees	Total
1. Accommodation services/hotels	7861	21,555	29,415
2 Food and beverage serving services/restaurants	35,179	49,775	84,954
3 Railway passenger transport services	0	5853	5853
4 Road passenger transport services	77,602	33,873	1,11,475
5 Water passenger transport services	2379	0	2379
6 Air passenger transport services	0	0	0
7 Transport equipment rental services	0	28,273	28,273
8 Travel agencies and other reservation services/supporting and auxiliary transport activities	6258	28,975	35,233
9 Cultural and religious services	18,955	2513	21,468
10 Sports and other recreational services	5956	5851	11,807
11 Health and medical-related services	22,446	76,656	99,102
Total jobs in tourism-characteristic industries	1,76,635	2,53,325	4,29,960
Total jobs in the State	20,59,317	15,92,453	36,51,770
Share of tourism in the total	8.58	15.91	11.77

Source: NCAER computation.

The number of jobs in tourism-characteristic industries in the State was estimated at 4.30 lakh in 2018-19. The total number of jobs in the state was 36.52 lakh. Hence, the direct share of tourism employment to the total employment works out to be 11.77 per cent. This share is 8.58 per cent in the case of self-employed status of work and is much higher at 15.91 per cent in the case of employees, which include casual workers and salaried or regular wage-earners.

IV.10. Indirect Contribution of Tourism

The indirect benefits of tourism result from the inter-linkages of tourism-specific industries with other industries of the economy. Besides, these result when the money spent by the tourists in an area is re-circulated and re-spent in the local economy, thereby generating extra income and output. The actual economic benefit to the area is, therefore, greater than the original amount spent by the tourists.

As suggested in the TSA: RMF 2008, the Input–Output (IO) model is used to quantify the indirect benefits. The model generates the output, GVA, and employment multipliers, which are the measures of the indirect benefits of a sector to the economy's output, GVA/GDP, and employment, respectively.

The basic requirement of an IO model is the IO table, which is prepared using the SUT. The SUT for the State is presented in TSA Table 5. This SUT is converted into an IO table for deriving the required multipliers for the tourism sector. However, the SUT of 24 industries and products does not list tourism as a separate sector, which is embedded within the tourism-characteristic and tourism-connected industries and products. Thus, in order to segregate the tourism component from these industries and products, the TIRs and TPRs are applied on each industry column and product row, respectively.

The indirect benefits due to the inter-linkages of the tourism industry with other industries are obtained in the Leontief Inverse matrix, simply called the “inverse” matrix, and subsequently through the multipliers. The multipliers represent a quantitative expression of the extent to which some initial, “exogenous” force or change is expected to generate additional effects through the interdependencies associated with some assumed and/or empirically established “endogenous” linkage system.

To be specific, if a sector increases its output, more inputs are required, including more intermediates from other sectors. Such an interconnection of a particular sector to another sectors is termed as a “backward linkage” and is represented by an “output multiplier”. This is the column sum of the inverse matrix. The higher the multipliers, the larger are the effects on the input–output system of the economy.

The employment multiplier is the ratio of the employment linkage coefficient to the employment direct coefficient. The direct coefficient is the employment to output ratio and the employment linkage coefficient is obtained by multiplying the row vector of the employment direct coefficient with the inverse matrix. It may be noted that employment refers to the number of jobs in an industry, so as to be in conformity with the TSA Table on Employment.

The tourism output multiplier, GVA multiplier, and employment multiplier are presented in Table IV.8.

Table IV.8: Values of Multipliers

	Values
Output Multiplier	2.2484
GVA Multiplier	2.2270
Employment Multiplier	2.2823

Source: NCAER computation

V. Summary of Findings

This report presents the TSA for Uttarakhand for the year 2018-19. The key outcome of the TSA is the quantification of contribution of tourism to the economy's GVA and its employment. While the contribution derived from the TSA tables and accounts represents the direct share of tourism, the model based on the input-output (IO) table is also used to estimate the indirect shares. The indirect contribution results from the inter-linkages of tourism with the other production sectors of the economy and is estimated through the values of multipliers obtained from the IO model.

The key highlights of the Uttarakhand TSA are as follows:

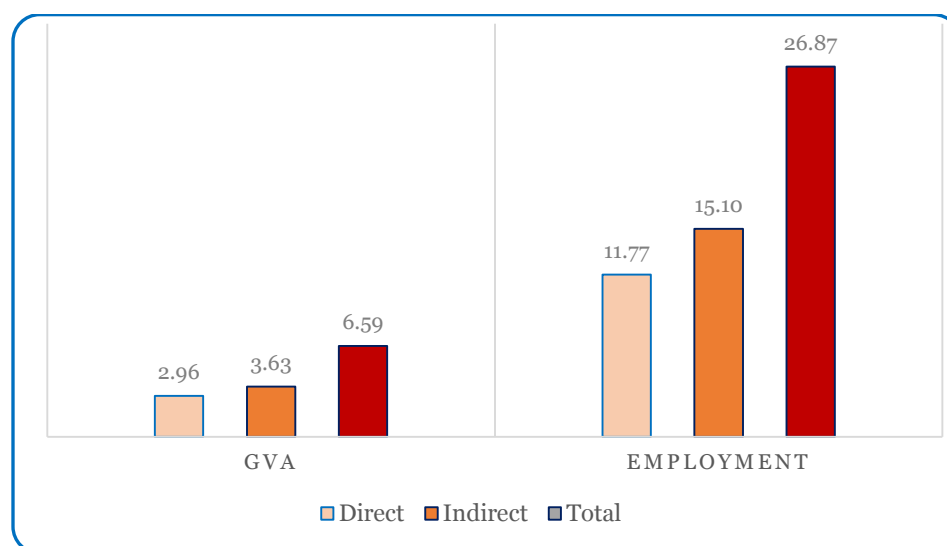
- As per the latest data available for 2018, the number of international tourist visits in the State of Uttarakhand is recorded at 1.54 lakh. On the other hand, the number of domestic tourist visits is much higher at 3.7 crore.
- Since the tourist visits refers to the visits undertaken by the tourists at various destinations, these can be more than one for a particular tourist. For the purpose of the TSA, the number of international and domestic tourists are estimated using the number of tourists recorded in the previous TSA's reference year of 2015-16 and using the growth seen in tourist visits during the years 2015-16 and 2018-19.
- Hence, the derived number of international tourists is 93,251 for 2018-19. These are referred to as inbound tourists from other countries.
- The other component of inbound tourism is derived from the trips undertaken to Uttarakhand from other States of the country. The number of such trips is estimated at 53.66 lakh. Meanwhile, domestic trips undertaken from within the State are estimated at 82.96 lakh.
- The number of outbound tourists or tourists who are the residents of the State and travel abroad is estimated at 37,831.
- The total inbound tourism expenditure incurred by the tourists visiting the State from other countries is estimated at Rs 847.4 crore, with the average per-tourist expenditure being Rs 90,868.
- The total inbound tourism expenditure incurred by tourists from other States is estimated at Rs 8130.23 crore, with the average per-trip expenditure being Rs. 15,150.
- The domestic tourism expenditure incurred by tourists from within the State is estimated at Rs 5998.02 crore, with the average per-trip expenditure being Rs7230.

- The outbound pre-trip tourism expenditure is estimated at Rs 31.96 crore, and on an average, an outbound tourist spends Rs 8449 in preparation for an international trip before leaving the country.
- All these tourism expenditures incurred by all types of tourists within the State, put together, refers to the Total Internal Tourism Expenditure. This works out to be Rs 15,007.56 crore for 2018-19. The shares of the inbound tourism expenditure incurred by tourists from other countries, the expenditure incurred by tourists from other States, the expenditure incurred by tourists from within the State, and the outbound pre-trip expenditure stand at 5.6 per cent, 54.2 per cent, 40.0 per cent, and 0.2 per cent, respectively.
- On adding the values of the imputed tourism consumption, total Internal Tourism Consumption works out to be Rs 19827.80 crore for 2018-19 or approximately Rs 20,000 crore.
- This represents the total demand of goods and services generated by the tourism sector. The total supply of all goods and services in the economy, as presented in the production account in TSA Table 5, is Rs 6,73,409 crore. When the tourism demand is compared with the total supply of all goods and services in the economy, the tourism demand works out to be 2.9 per cent of the total supply.
- This comparison for all the goods and services leads to the TPR. The TPR is the highest for accommodation services, at 89.5 per cent. This means that of the total output of this service, 89.5 per cent is consumed by tourists and is thus the result of tourism activities.
- Other goods and services that are highly dependent on tourism activities are air passenger transport services, travel agents and reservation services, and road passenger transport services. This is the reason that all these fall under tourism characteristic goods and services. Among the tourism-connected goods, the TPR is notably high for readymade garments, and is estimated at 67.8 per cent.
- Further, the TIRs are derived by applying the TPRs on each industry column in the SUT framework. The TIRs are also significantly high for all the above-mentioned goods and services.
- However, in the case of tourism-connected industries, only the activity by which they are made available to visitors generates tourism direct value added. Hence, only the associated retail trade margin generates a share. Consequently, in the case of goods, the values of tourism shares are very small, as compared to the total supply. Hence, in such cases, the TIRs are very small and almost equal to zero.

- The summation of tourism components extracted from each industry, through the TIRs, form the TDGVA. This TDGVA for the Uttarakhand economy is estimated at Rs 6472.5 crore, which translates into 2.96 per cent of the total GSVA. This is the direct share of tourism to the State GVA.
- With regard to employment, tourism employment refers to the number of jobs in tourism-characteristic industries in the State. This is estimated at 4.30 lakh for 2018-19. The total number of jobs in the State is 36.52 lakh. Hence, the direct share of tourism employment to the total employment works out to be 11.77 per cent.
- This share is 8.58 per cent in the case of the self-employed status of work and is much higher at 15.91 per cent in the case of employees, which include casual workers and salaried or regular wage-earners.
- The indirect impact of tourism is also assessed in this study. This is captured through the input-output model, which has generated the output, GVA, and employment multipliers. These multipliers, when multiplied with the direct impact or direct shares, give the total impact or share, including the indirect impact.
- Consequently, the total share of tourism in the State GVA is estimated at 6.59 per cent and the total share in the number of jobs in the State is estimated at 26.87 per cent.

Figure V.1 presents the direct, indirect, and total shares of tourism in the State economy.

Figure V.1: Shares of Tourism in GVA and Employment of the State



Source: Tourism Satellite Account, Uttarakhand, 2018-19

Appendix A1

Table A.1: Item-wise Rate of Inflation (2018-19 over 2015-16)

Tourism-specific Products/Services	Inflation in 2018-19 over 2015-16
A.1 Tourism-characteristic Products/Services	
Accommodation services	11.99
Food and beverage serving services	16.74
Railway passenger transport services	8.63
Road passenger transport services	8.63
Water passenger transport services	8.63
Air passenger transport services	8.63
Transport equipment rental services	8.63
Travel agencies and other reservation services	11.99
Cultural and religious services	10.32
Sports and other recreational services	10.32
Health and medical-related services	13.10
A.2 Tourism-connected Products	
Readymade garments	12.48
Processed food	8.37
Alcohol and tobacco products	8.37
Travel-related consumer goods	14.89
Footwear	11.71
Soaps, cosmetics, and glycerine	14.50
Gems and jewellery	14.50
Books, journals, magazines, stationery, etc.	12.05

Source: NCAER computation.

Glossary

Basic Price

The basic price is the amount receivable by the producer from the purchaser for a unit of a good or service produced as the output minus any tax payable, and plus any subsidy receivable, on that unit as a consequence of its production or sale; it excludes any transport charges invoiced separately by the producer.

Direct Tourism Gross Domestic Product

This is the Direct Tourism Gross Value Added plus net taxes on products that are attributable to the tourism industry (tourism net taxes on products). Direct Tourism GDP will generally have a higher value than Direct Tourism Value Added. Direct Tourism GDP is a satellite account construct to enable a direct comparison with the most widely recognised national accounting aggregate, that is, GDP. While it is useful in this context, the Direct Tourism Gross Value Added measure should be used when making comparisons with other industries or between countries. See also Direct Tourism Gross Value Added and tourism net taxes on products.

Direct Tourism Gross Value Added

This is the value of direct tourism output at basic prices, less the value of the inputs used in producing these tourism products. This measure is directly comparable with the value added of 'conventional' industries, such as mining and manufacturing, and should also be used for comparisons across countries. See also Direct Tourism Output and Direct Tourism GDP.

Direct Tourism Output

This is the value of goods and services, at basic prices, which are consumed by visitors and produced in the economy by industries in a direct relationship with visitors.

Domestic Output

This is the output produced by resident enterprises.

Domestic Tourism

The travel of domestic visitors is called domestic tourism. It comprises the activities of a resident visitor

Domestic Tourism Consumption

within the country of reference as part of either a domestic tourism trip or an outbound tourism trip.

This consists of the tourism consumption by resident visitors on tourism-related products within the economy.

Domestic Travel

Travel within a country by residents is called domestic travel.

Domestic Travellers

Those who undertake domestic travel are domestic travellers.

Domestic Trip

A domestic trip is one with a main destination within the country of residence of the visitor.

Domestic Visitor

A domestic traveller qualifies as a domestic visitor if: (a) he/she is on a tourism trip, and (b) he/she is a resident travelling in the country of reference.

Domestic visitors are those who travel within the country to a place other than their usual place of residence and stay at hotels or other accommodation establishments run on a commercial basis or in *dharamshalas/sarais/musafirkhanas/ agrashalas/choultries*, for a duration of not less than 24 hours or one night and for not more than 12 months at a time.

Economic Activity

Any activity resulting in the production of goods and services that add value to the national product is considered as an economic activity. Such activities include the production of all goods and services for market (market activities), that is, the production for pay or profit, and, among the non-market activities, the production of goods and household services with paid domestic employees and owner-occupied dwellings for own consumption and own account production of fixed assets.

Employed Persons

This is the number of persons usually employed in the principal and subsidiary statuses.

Employed as per Principal Activity Status

This includes those in the labour force pursuing some economic activity for a major time during the reference period of 365 days.

Employed as per Subsidiary Activity Status

This includes those in the labour force pursuing some economic activity for a relatively shorter time or minor time during the reference period of 365 days.

Enterprise

An enterprise is an institutional unit in its capacity as a producer of goods and services; an enterprise may be a corporation, a quasi-corporation, a non-profit institution, or an unincorporated enterprise.

Final Demand

Transactions that involve purchases of produced goods and services for final uses are presented in the final demand table. The “final” use for a good or service is that it is not used up entirely in the reference year as an intermediate input in the production of some other good or service. Transactions for goods and services that are completely used to produce other goods and services are shown in the intermediate input (or use) table of the accounts.

Final Output

This is that part of the total output of each industry sold either for final consumption by households, general government, or for investment (including additions to inventories) and for export. In short, it represents the total output sold to final buyers. For the whole economy, the total final output is equal to the value of the goods and services (both domestically produced and imported) available for consumption, investment, and export.

Final Consumption

Final consumption consists of goods and services used up by individual households or the community to satisfy their individual or collective needs or wants.

Final Consumption Expenditure of Government

Government final consumption expenditure consists of expenditure, including imputed expenditure, incurred by the general government on both individual consumption goods and services, and collective consumption services.

***Final Consumption
Expenditure of Households***

The household final consumption expenditure consists of the expenditure, including imputed expenditure, incurred by resident households on individual consumption goods and services, including those sold at prices that are not economically significant.

Gross Domestic Product

The Gross Domestic Product or GDP is the total market value of goods and services produced in the economy within a given period after deducting the cost of goods and services used up in the process of production but before deducting allowances for the consumption of fixed capital. Thus GDP, as defined here, is 'at market prices'.

***Gross Domestic Product –
Output-based***

Output-based GDP is the sum of the GVAs of all resident producers at basic prices, plus all taxes less subsidies on imports, plus all non-deductible VAT (or similar taxes).

Gross Margin

The gross margin of a provider of reservation services is the difference between the value at which the intermediated service is sold and the value accrued to the provider of reservation services for this intermediated service.

Gross Value Added

Gross Value Added or GVA is the value of output less the value of intermediate consumption; it is a measure of the contribution to GDP made by an individual producer, industry or sector; GVA is the source from which the primary incomes of the SNA are generated and is, therefore, carried forward into the primary distribution of the income account.

***Gross Value Added at Basic
Prices***

GVA at basic prices is the output valued at basic prices less the intermediate consumption valued at purchasers' prices.

***Gross Value Added of The
Tourism Industries (GVATI)***

GVA of the tourism industries is the total GVA of all establishments belonging to tourism industries, regardless of whether all their output is provided to visitors and of the degree of specialisation of their production process.

Household Tourism Consumption

This consists of the tourism consumption by resident households on tourism-related products within the economy.

Imputed Tourism Consumption

This consists of imputations made for consumption by visitors of certain goods and services for which they do not make a payment. Imputation is confined to a small number of cases wherein a reasonably satisfactory basis for the valuation of the implied transaction is available, and where their inclusion is consistent with the production boundary in the core national accounts.

Inbound Travel

Travel to a country by non-residents is called inbound travel.

Inbound Trip

An inbound trip is one with a main destination outside the country of residence of the visitor.

Inbound Tourism

The travel of inbound visitors is called inbound tourism. It comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip.

Inbound Tourism Consumption

This is the tourism consumption of a non-resident visitor within the economy of reference.

Input-Output Model

This model provides a detailed breakdown of economic activity among business industries and a detailed breakdown of their inputs and outputs by commodity associated with some arbitrarily fixed exogenous demand. It also provides supply requirements from other sources such as imports and government production of goods and services. The input-output model is a structural model dealing primarily with resource allocation in the economy corresponding to an exogenously given demand.

Input-Output Tables

Input-output tables are derived from the Supply and Use Tables (SUTs), which show the process of flows of goods and services through the economic system between producers and consumers. Those making transactions in the production process include individuals (persons or households), establishments (production units of businesses and governments), non-business entities

such as non-profit institutions, and governments. An input-output table presents a detailed analysis of the process of production and the use of goods and services (products) and the income generated in that production; they can be in the form of (a) either SUTs; or (b) symmetric input-output tables. These tables include the Imports Use and Domestic Use matrices, industry by industry, and product by product matrices plus the Leontief inverse, multipliers, and other analyses of their structure.

Intermediate Consumption

This consists of the value of the goods and services consumed as inputs by a process of production, excluding fixed assets whose consumption is recorded as the consumption of fixed capital; the goods or services may be either transformed or used up by the production process.

Intermediate Output

This is that part of the total output of each industry consumed by other industries in the production process.

Internal Tourism

This comprises domestic tourism and inbound tourism, that is, the activities of resident and non-resident visitors within the country of reference as part of domestic or international tourism trips.

Internal Tourism Consumption

Internal tourism consumption is the tourism consumption of both the resident and non-resident visitors within the economy of reference. It is the sum of domestic tourism consumption and inbound tourism consumption.

International Tourism

This comprises inbound tourism and outbound tourism, that is, the activities of resident visitors outside the country of reference, as part of either domestic or outbound tourism trips, and the activities of non-resident visitors within the country of reference on inbound tourism trips.

International Tourism Consumption

This is also referred to as internal tourism consumption by international visitors. It consists of the tourism consumption within the economy by non-residents on tourism-related products.

International Travellers

Those who undertake international travel are considered as international travellers.

International Visitor

An international traveller qualifies as an international visitor with respect to the country of reference if: (a) he/she is on a tourism trip, and (b) he/she is a non-resident travelling in the country of reference or a resident travelling outside of it.

Leontief Inverse (Input-Output) Table

The columns of the Leontief inverse (input-output) table show the input requirements, both direct and indirect, on all other producers, generated by one unit of output.

Main Destination

The main destination of a tourism trip is defined as the place visited that is central to the decision to take the trip.

Main Purpose of a Trip

The main purpose of a trip is defined as the purpose in the absence of which the trip would not have taken place. The main purpose of a trip is one of the criteria used to determine whether the trip qualifies as a tourism trip and whether the traveller qualifies as a visitor. If the main purpose of the trip is to be employed and earn income (compensation for the labour input provided), then the trip cannot be a tourism trip, and the individual taking the trip cannot be considered as a visitor (even though it is outside his/her usual environment and may be for less than 12 months), but as an “other traveller”.

Margin

This is the difference between the resale price of a good and the cost to the retailer or wholesaler of the good sold. A transport margin consists of the transport charges invoiced separately by the producer in the delivery of a good.

Margin (Trade)

A trade margin is the difference between the actual or imputed price realised on a good purchased for resale (either wholesale or retail) and the price that would have to be paid by the distributor to replace the good at the time it is sold or otherwise disposed of.

Margin (Transport)

A transport margin consists of those transport charges paid separately by the purchaser in taking delivery of the goods at the required time and place.

Multipliers

An I-O multiplier is a quantitative measure created by a particular I-O-based economic model. It is an analytical answer to a hypothetical question about how a certain expenditure is expected to impact the economy. The multipliers allow users to make estimates of the whole economy impacts of small changes in the economy.

National Tourism

This comprises domestic tourism and outbound tourism, that is, the activities of resident visitors within and outside the country of reference, as part of either domestic or outbound tourism trips.

National Tourism Consumption

National tourism consumption is the tourism consumption of resident visitors within and outside the economy of reference. It is the sum of domestic tourism consumption and outbound tourism consumption.

Net Taxes on Products

These are also referred to as taxes less subsidies on products. A tax or subsidy on a product is payable per unit of a good or service. The tax or subsidy may be a specific amount of money per unit of quantity of a good or service (with the quantity being measured in terms of either discrete units or continuous physical variables such as volume, weight, strength, distance, time, etc.), or it may be calculated *ad valorem* as a specified percentage of the price per unit or value of the goods or services transacted. A tax or subsidy on a product usually becomes payable when the product is produced, sold, or imported, but it may also become payable in other circumstances, such as when a good is exported, leased, transferred, delivered, or used for own consumption or own capital formation. See also 'Other Taxes on Production and 'Taxes Less Subsidies on Production and Imports'.

Other Taxes on Production

These consist of all taxes that enterprises incur as a result of engaging in production, except taxes on products. Other taxes on production include: taxes related to the payroll or workforce numbers excluding

	compulsory social security contributions paid by employers and any taxes paid by the employees themselves out of their wages or salaries; recurrent taxes on land, buildings, or other structures; some business and professional licences where no service is provided by the Government in return; taxes on the use of fixed assets or other activities; stamp duties; taxes on pollution; and taxes on international transactions. See also 'Taxes Less Subsidies on Production and Imports'.
<i>Outbound Tourism</i>	The travel of outbound visitors is called outbound tourism. It comprises the activities of a resident visitor outside the country of reference, either as part of an outbound tourism trip or as part of a domestic tourism trip.
<i>Outbound Tourism Consumption</i>	Outbound tourism consumption is the tourism consumption of a resident visitor outside the economy of reference. It is also referred to as 'tourism imports', and consists of the tourism consumption by resident visitors outside of the economy while on an international trip.
<i>Outbound Trip</i>	An outbound trip is one with a main destination outside the country of residence of the visitor.
<i>Outbound Travel</i>	Travel outside a country by residents is called outbound travel.
<i>Output</i>	Output consists of those goods or services that are produced within an establishment that becomes available for use outside that establishment, plus any goods and services produced for own final use.
<i>Output Multiplier</i>	The output multiplier for a particular industry is defined to be the total of all outputs from each domestic industry required in order to produce one additional unit of output: that is, the column sums (Σ_i) from the Leontief inverse matrix (L_{ij}).
<i>Principal Activity</i>	The principal activity of a producer is the activity whose value added exceeds that of any other activity carried out within the same unit. The output of the principal activity

***Principal Usual Activity
Status of Persons***

must consist of goods or services that are capable of being delivered to other units even though they may be used for own consumption or own capital formation.

The activity status of a person during the reference period of 365 days preceding the date of the survey, which is determined on the basis of a person spending a relatively longer time (that is, the major time criterion). Based on this, a person is categorised as (a) belonging to the labour force, and (b) not belonging to the labour force ('neither working nor available for work'). Within the labour force, the criterion of (i) 'working', and (ii) 'not working but seeking and/or available for work' is again based on the major time criterion. The principal status workers are from (i) whereas the subsidiary status workers can be from either of or both (i) and (ii).

Production

Production is an activity that is carried out under the responsibility, control, and management of an institutional unit that uses inputs of labour, capital, and goods and services to produce outputs of other goods and services.

Production Account

The production account records the activity of producing goods and services as defined within the SNA; its balancing item, that is, GVA, is a measure of the contribution to GDP made by an individual producer, industry, or sector.

Products

Products, also called "goods and services", are the result of production; they are exchanged and used for various purposes: as inputs in the production of other goods and services, as final consumption, or for investment.

Purchaser's Price

This is the amount paid by the purchaser, excluding any deductible VAT or similar deductible tax, in order to take delivery of a unit of a good or service at the time and place required by the purchaser; the purchaser's price of a good includes any transport charges paid separately by the purchaser to take delivery at the required time and place.

Social Transfers in Kind

These consist of social security and social assistance benefits in kind together with goods and services

Subsidies

provided to individual households outside any social insurance scheme by non-market producers owned by government units or non-profit institutions (NPIS).

These are current unrequited payments that government units, including non-resident government units, make to enterprises on the basis of the levels of their production activities or the quantities or values of the goods or services which they produce, sell, or import. They include the financing of deficits on public trading services deliberately run at a loss. There are two types: see 'Subsidies on Production' and 'Subsidies on Products'.

Subsidy on a Product

A subsidy on a product is a subsidy payable per unit of a good or service produced, either as a specific amount of money per unit of quantity of a good or service or as a specified percentage of the price per unit; it may also be calculated as the difference between a specified target price and the market price actually paid by a buyer. These are subsidies based on a quantity or value of goods or services sold.

Supply

The supply of a good or service is the sum of the values of its domestic output (from all sectors), plus imports, c.i.f., when measured at basic prices. At purchasers' prices, trade and transport margins and net taxes on products are also added.

Supply Table

The main body of the Supply Table shows estimates of domestic industries' output by the type of product at basic prices. The columns represent the supplying industries while the rows represent the products supplied. Additional columns covering the imports of goods and services, distributors' trading margins and taxes (less subsidies) on products are added to show the supply of all goods and services at purchasers' prices.

Supply and Use Tables

Supply and use tables are in the form of matrices that record how supplies of different kinds of goods and services originate from domestic industries and imports, and how those supplies are allocated between various intermediate or final uses, including exports.

Tax on a Product

A tax on a product is a tax that is payable per unit of some good or service, either as a specified amount of money per unit of quantity or as a specified percentage of the price per unit or value of the good or service transacted.

Taxes on Production and Imports

Taxes on production and imports consist of taxes payable on goods and services when they are produced, delivered, sold, transferred, or otherwise disposed of by their producers plus taxes and duties on imports that become payable when goods enter the economic territory by crossing the frontier or when services are delivered to resident units by non-resident units; they also include other taxes on production, which consist mainly of taxes on the ownership, or use of land, buildings or other assets used in production, or on the labour employed, or compensation of employees paid.

Total Final Expenditure

This is the sum total of final consumption, gross capital formation, and exports of goods and services. The total final expenditure is the same as the total demand by final buyers and is equal to the total final output.

Total Intermediate Consumption

The total intermediate consumption of each industry is the industry's total purchases of the outputs of other industries as well as purchases of imports of goods and services and intra-industry purchases for use in its production process. This is adjusted for the change in inventories of materials and fuels and excludes primary inputs.

Total Tourism Internal Demand

This is the sum of internal tourism consumption, tourism gross fixed capital formation, and tourism collective consumption. It does not include outbound tourism consumption.

Total Output

The total output of an industry is the aggregate value of the goods and services together with the work-in-progress produced by the industry. It is equal to the value of the industry's sales plus any increase (and less any decrease) in the value of its inventories of finished products and work-in progress. Output is thus measured after deducting the holding gains. The outputs of the

***Taxes Less Subsidies on
Production and Imports***

distribution and service trades industries are measured on a 'gross margin' basis.

These are defined as 'taxes on products' plus 'other taxes on production' less 'subsidies on products' less 'other subsidies on production'. The taxes do not include any taxes on the profits or other income received by an enterprise. They are payable irrespective of the profitability of the production process. They may be payable on the land, fixed assets, or labour employed in the production process, or on certain activities or transactions.

Tourism

This comprises all the activities undertaken by the visitors.

***Tourism-characteristic
Industries***

These are industries that would either cease to exist in their present form, producing their present product(s), or would be significantly affected if tourism were to cease. Under the international TSA standards, the core lists of tourism-characteristic industries, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate an international comparison. Some countries use the criterion that at least 25 per cent of an industry's output must be consumed by visitors for the particular industry to be a country-specific tourism characteristic industry.

***Tourism-characteristic
Products***

These are defined in the international TSA standards as those products which would cease to exist in meaningful quantity, or for which sales would be significantly reduced, in the absence of tourism. Under the international TSA standards, core lists of tourism-characteristic products, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate international comparison. It is also recommended in the international TSA standards that country-specific tourism-characteristic products should be identified.

***Tourism-connected
Industries***

These are industries other than tourism-characteristic industries, for which a tourism-related product is

directly identifiable (primary) to, and where the products are consumed by visitors in volumes which are significant for the visitor and/or the producer. All other industries are classified as non-tourism industries, though some of their products may be consumed by visitors and are included in the calculation of direct tourism gross value added and direct tourism GDP.

Tourism-connected Products

These are products that are consumed by visitors but are not considered as tourism-characteristic products. All other products in the SUT that are not consumed by visitors are classified as 'all other goods and services' in the TSA.

Tourism Consumption

Tourism consumption has the same formal definition as tourism expenditure. Nevertheless, the concept of tourism consumption used in the TSA goes beyond that of tourism expenditure. Actually, besides “the amount paid for the acquisition of consumption goods and services, as well as valuables for own use or to give away, for and during tourism trips” that corresponds to monetary transactions (the focus of tourism expenditure), it also includes services associated with vacation accommodation on own account, tourism social transfers in kind, and other imputed consumption. These transactions need to be estimated by using sources that are different from the information collected directly from the visitors such as reports on home exchanges, estimations of rents associated to vacation homes, and calculations of FISIM, among others.

Tourism Demand

This is the expenditure made by, or on behalf of, the visitor before, during, and after the trip and which expenditure is related to that trip and which trip is undertaken outside the usual environment of the visitor.

Tourism Direct Gross Domestic Product (TDGDP)

This is the sum of the part of the GVA (at basic prices) generated by all industries in response to internal tourism consumption plus the amount of net taxes on products and imports included within the value of this expenditure at purchasers' prices.

<i>Tourism Direct Gross Value Added (TDGVA)</i>	This is the part of the GVA generated by tourism industries and other industries of the economy that directly serve visitors in response to internal tourism consumption.
<i>Tourism Expenditure</i>	This is the amount paid for the acquisition of consumption goods and services as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves as well as expenses that are paid for or reimbursed by others.
<i>Tourism Industry Ratio</i>	This is the proportion of the total value added of an industry which is related to tourism.
<i>Total Tourism Internal Demand</i>	This is computed by adding the tourism internal consumption (domestic and inbound tourism consumption) to the other components of internal demand, such as tourism collective consumption and tourism gross fixed capital formation.
<i>Tourism Product Ratio</i>	This is the proportion of the total supply of a product which is consumed by visitors.
<i>Tourism Share</i>	This is the share of the corresponding fraction of internal tourism consumption to each component of supply. For each industry, the tourism share of output (in value) is the sum of the tourism share corresponding to each product component of its output.
<i>Tourism Single Purpose Consumer Durable Goods</i>	These constitute a specific category of consumer durable goods, including durable goods that are used exclusively, or almost exclusively by individuals while on tourism trips.
<i>Tourism Satellite Account</i>	This is achieved by analysing in detail all the aspects of the demand for goods and services which might be associated with tourism, in establishing the actual interface with the supply of such goods and services within the economy of reference, or outside, and in describing how this supply (from domestic or imported origin) interacts with other economic activities, using the SUT as a reference.

<i>Tourist</i>	A visitor (domestic, inbound, or outbound) is classified as a tourist (or overnight visitor) if his/her trip includes an overnight stay.
<i>Tourism Trip</i>	These are trips which are undertaken by visitors.
<i>Tourism Visit</i>	This term refers to a stay in a place visited during a tourism trip. However, in the discussion of the different forms of tourism (domestic, inbound, and outbound), the term 'visitor' is often used instead of the tourism visit or tourism trip.
<i>Travel</i>	This refers to the activity of travellers.
<i>Trip</i>	A trip refers to the travel undertaken by a person from the time of departure from his/her usual residence until he/she returns to the same place: it thus refers to a round trip. A trip is made up of visits to different places. An inbound trip will correspond to the travel between arriving in a country and leaving, whereas a domestic trip or an outbound trip will correspond to the travel between leaving the place of residence and returning. A domestic trip has a main destination in the country of residence of the traveller, while an outbound trip has a main destination outside this country.
<i>TSA Aggregates</i>	The compilation of the following aggregates, which represent a set of relevant indicators of the size of tourism in an economy, is recommended as the TSA aggregates: • Internal tourism expenditure; • Internal tourism consumption; • Gross Value Added of the tourism industries (GVATI); • Tourism Direct Gross Value Added (TDGVA); and • Tourism Direct Gross Domestic Product (TDGDP).
<i>Uses</i>	This term refers to transactions in the current accounts that reduce the amount of economic value of a unit or sector; for example, wages and salaries are a type of use

for the unit or sector that must pay them. By convention, uses are on the left-hand side of SNA accounts.

Usual Environment

This is the geographical area (though not necessarily a contiguous one) within which an individual conducts his/her regular life routines. This is made up of one or more areas in which a person undertakes their regular activities such as their residence, place of work, place of study, and other places frequently visited. The usual environment criteria has two dimensions: frequency (places that are visited on a routine basis) and distance (locations close from home for overnight trips).

Visitor

A visitor is a traveller taking a trip to a main destination outside his/her usual environment for less than a year and for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited.

