

# Destination Attractiveness of Kerala as an International Tourist Destination: An Importance-Performance Analysis

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## Introduction: Tourism Development in Kerala

Kerala lies on the southwest coast of the Indian Peninsula, stretching 360 miles along what is known as the Malabar Coast and has been noted by many as a paradise of tourism. Kerala is a prime high-end tourism destination in the Indian sub-continent and has been rated as “one of the fifty destinations to be visited in one’s lifetime” by the National Geographic Channel (2004). Moderate climate, rich art, colorful festivals, diverse natural and cultural attractions with a physical quality of life comparable to developed nations are causing tourism industry to flourish in Kerala. Compared to the other states in India, Kerala is unique for its interesting geographical diversity it possesses within the smallest area possible. This diversity offers tourists a range of attractions and experience such as beaches, backwaters, wildlife sanctuaries, evergreen forests and diverse flora and fauna of Kerala. It is often projected as the “Green Gateway” to India (Netto, 2004). The tourism map of Kerala is given below (Figure 1):



Fig. 1.Tourism Map of Kerala

Tourism has emerged as a lead sector of the Kerala economy, with its impact increasing in terms of economic growth and employment generated (GOK, 2002 a&b). The state government views tourism as one of the few alternatives available to develop the economy, especially in the context of limited prospects of the manufacturing sector, problems in the agricultural and traditional sectors, and the uncertainties

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facing the expatriate employment in the Persian Gulf (Pushpangadan, 2003). Kerala is now considered as a tourism model for other states in India to emulate its growth. Tourism industry in Kerala witnessed considerable growth during nineties and beyond and is expected to grow further in the future. Kerala is one of the earliest Indian states to announce industry status for tourism in 1986 and announce various incentives and subsidies to attract investment (Rao and Suresh, 2001).

Kerala's share of international tourists coming to India has increased from 5.54 percent in 1994 to 8.85% percent in 2005 making it a leading state for tourism in the country. Earnings from tourism is also projected to grow at a record level of more than 23.5 percent which is very high than earnings growth projected for India and world average which is 14.3 percent and 6.5 percent. During this same period, tourism receipts from international tourists also grew considerably, from 116 crore in 1994 to 1988.40 crore in 2006 (GOK, 2006). International tourist arrivals to Kerala had reached almost half million in 2006, and is expected to cross 5 lakh by 2007. For the domestic tourism, the arrivals had crossed 60 lakhs in 2006. This almost meets the prediction of world Travel and Tourism Council (WTTC) that with an average annual arrival growth rate of 18% for domestic tourists and 12% for international tourists Kerala is becoming one of the fastest growing destinations in the world (WTTC, 2002). The growth of domestic and international tourism in Kerala and its relative position in the Indian tourism in the recent past is depicted in tables 1.1 and 1.2.

**Table 1.1. International & Domestic Tourists Arrivals (Source: Department of Tourism, Government of Kerala, Tourist Statistics, 1994, 1998, 2002, 2006)**

<b>Year</b>	<b>International tourists</b>	<b>Domestic tourists</b>
1994	104568	1284375
1996	176855	4403002
1998	189941	4481714
2000	209893	5013221
2002	232564	5568256
2004	345546	5972182
2006	428534	6271724

**Table 1.2. Kerala's share of foreign tourists to India (Source: Department of Tourism, Government of Kerala, Tourist Statistics, 1994, 1998, 2002, 2004)**

<b>Year</b>	<b>India</b>	<b>Kerala</b>	<b>% Share</b>
1994	1886433	104568	5.54
1996	2287860	176855	7.73
1998	2358629	189941	7.68
2000	2649378	209893	7.92
2002	2384364	232564	9.75
2004	3367980	345546	10.26

Tourism is also counted as an important alternative to address unemployment which is a major problem facing the state (Kokkranikal and Morrison, 2002). Further reasons making tourism industry attractive for the state includes, its strong linkages with other sectors in the state, and its potential for generating benefits more widespread throughout the state for a given level of capital investment compared to other sectors. A study done shows a strong multiplier effect for tourism industry in the state for both output multiplier and employment multiplier (TCS, 2000). With regard to employment generation in the state, Travel and tourism industry is expected to create 7.5 lakh jobs in the next 10 years and the broader impact of it on economy can create 1.4 million jobs during this period (WTTC, 2002).

Understanding tourists' preferences and their perception of the destination are considered essential inputs in tourism planning and marketing efforts (Kotler et al., 2005). With this idea in mind, the present study employs the Importance-Performance technique to evaluate the destination attractiveness of Kerala, as perceived by the international tourists' visiting Kerala. The implications of the study are discussed in detail. In addition, this paper attempts to provide a broad overview of the salient features of tourism practice in the state of Kerala.

## The State's Tourism Policy Framework

As noted elsewhere, Kerala is one of the earliest states in India to announce industry status for tourism in 1986 and announce various incentives and subsidies to attract investment. These early efforts were aimed at creating the investment friendly atmosphere for tourism in the state needed for the industry to grow. This increased the investment opportunities for potential investors. Main lending institutions like KFC (Kerala Financial Corporation), TFCI (Travel Financial Corporation of India) and KSIDC (Kerala state industrial development corporation) played important role in funding the tourism projects. State also adopted many proactive measures to stimulate investment in tourism industry like a system for fast track clearance of tourism projects, subsidies, technical guidance, marketing assistance and support in availing loans (GOI, 1998).

The shift in emphasis of tourism department to a more proactive role of tourism development and marketing and promotion of the destination started since early nineties (Kokkranikal and Baum, 2002). The first tourism policy that came out in 1995 spells out the major direction for growth in the industry. Priority areas identified were infrastructure development, human resource development for tourism, marketing and product development (GOK, 1995). Thereafter this tourism policy remained the basis for much of the states progress over the last 10 years whether in terms of infrastructure, product development or tourism performance (WTTC, 2002). The key role played by private sector in all these areas was identified in addition to defining the role of state as a facilitator creating the suitable condition for investment by creating the basic infrastructure for tourism to grow.

For the first time the manner of growth needed was also envisioned in the first tourism policy, i.e. promoting destination more as quality destination, attracting high spending tourists than going for mass tourism chasing numbers (GOK, 1995). This conscious strategy of taking the destination Kerala away from mass tourism to a destination with a boutique image attracting tourists of a specific taste required developing new tourism products and new destination regions. Diversifying to new products was also a part of strategy of differentiation especially when other nearby states and nearby regions like Srilanka and Maldives offer same kind of products of superior value. So in addition to beaches, Kerala as a destination started developing and promoting varied tourist products like backwater with house boat attractions and Ayurveda rejuvenation holidays attractions. The first tourism policy also highlighted the need for creating human resources of good quality to serve the growing needs of the industry to promote quality tourism (GOK, 1995).

The stated objective of the state government is to promote Kerala more as quality destination, attracting high spending tourists than going for mass tourism chasing numbers (GOK, 1995). This conscious strategy of taking the destination Kerala away from mass tourism to a destination with a boutique image attracting tourists of a specific taste required developing new tourism products and new destination regions. Varied tourism products like backwater attractions and ayurvedic rejuvenation based attractions have helped to acquire a unique image in the international and domestic markets.

Despite setting the direction for growth in the tourism industry, the initial tourism policy framework of the state was not sound and it lacked in providing a detailed action plan for the destination to grow. The government came out with a new policy document titled “Vision 2020” in the year 2000 which was more comprehensive and stressed the sustainability concerns along with the tourism growth (Kerala Tourism, 2007). Among others, it reflected on the growing concern for environmental conservation, heritage and culture protection, lack of basic infrastructure surrounding major destinations, and the need for proper quality assurance systems and legislations to regulate and bring quality in tourism. It also stressed on the integrated development of infrastructure with special tourism zones based on master plans so that the pristine quality of the environment is preserved for making Kerala an up market high quality destination. The new policy aims to make tourism Kerala’s core competency sector and gives special emphasis on enhancing the employment potential of the sector for alleviating poverty thereby making tourism the most important sector for the socio-economic development and environment protection of the state. Apart from reiterating the role of the Government as a facilitator for the growth of tourism industry, it has also identified the need for the state to come up with regulations for directing the growth of tourism in the right direction (Netto, 2004).

## Product Development and Destination Marketing

From the first tourism policy onwards there was an emphasis on developing new product or new destination every year. This is part of tourism strategy to develop an image of up market high quality

destination for Kerala to attract high spending discerning travelers who seek unique experiences from the destination. Increasing the appeal for ayurvedic rejuvenation holidays and heritage attractions in the international and domestic markets and expanding variety in accommodation provision of boutique resorts and heritage hotels etc are some of the landmarks in successful product development efforts in the tourism industry. It is this aspect of the destination, National Geographic reported regarding the resort architecture as one of the best in the country blending culture and ethos of the land. Initiatives taken by government for converting old buildings of traditional Kerala architecture (traditional nalukettus and tharavadus) to heritage type accommodation properties will add further to this image.

Enhancing the appeal of tourist attractions with suitable product innovation came up in many forms. For instance, Traditional ketuvallams (country boats) converted into improved and uniquely designed house boats with modern facilities offer tourist a unique experience of backwater attractions. Innovations were also seen in developing unique tourism packages with niche attractions: Thekady Tiger Trail developed in collaboration with forest department involving 25-30 km of trek through the wild life sanctuary; and ‘a day with masters’ a tourism package developed enabling tourists to experience intensely traditional art forms like Kathakali, Kodiyattom and Theyyam, spending time with great masters in these art forms (Kerala Tourism, 2007).

Initiatives for creating variety of tourism products offer tourists an enriching experience of Kerala. Such initiatives can be either enhancing the existing tourist attractions or developing new attractions. Tourism packages developed around plantations sector, ‘avian’ tourism to attract bird watchers; and developing tourism packages to promote Kerala as a Meetings Incentives, Conventions and Exhibitions (MICE) destination are few such initiatives. Another emerging tourism form is eco tourism, linking tourism development and environment. This project has come up in Thenmala, in the Western Ghats, where activities such as trekking through rain forest and staying in tree top huts are organized. It is probably the first planned eco tourism destination in the country, implemented with the support of forest department and the local community (Kerala Tourism, 2007).

One area the state performed well is promotion and marketing of the destination. This is achieved through focused marketing efforts during the last 10 years. There were also efforts at branding the destination along with the focused promotional strategies around the theme ‘gods own country’. In a way this has resulted in creating a boutique image for the destination in the various generating markets. These efforts helped to differentiate the destination from the other states of India. In this process, Kerala as a tourist destination has evolved into a brand of its own. Kerala is listed among the top 100 brands of the country, by the globally renowned super brands ltd. This brand equity held by the destination can be effectively exploited in the years to come and can give the destination a head start over other states of India (Netto, 2004).

Over the years the state has adopted consistently a strategic approach to marketing of destination given the limited marketing budget and consequently created the desired impact in building the awareness and appeal for the destination both in the domestic and international markets. During this period, Kerala took the bold initiative of participating with its own pavilion in key international travel fairs in Europe and west Asia, which are the key markets for the destination. Attending independently such important travel fairs enabled marketing the destination directly to the key intermediaries such as international tour operators, airlines and travel media for increased visibility in the clutter of global tourism map (WTTC, 2002).

Another high impact marketing initiative was the launch of Kerala Travel mart (KTM) in 2000 which is now India’s premier international travel mart which gets overwhelming response from the trade. KTM 2002 saw the participation of trade from new markets like USA, Denmark, Greece, Ireland and Sweden. With these efforts, destination Kerala has started getting noticed in the global tourisms map even as a stand alone destination. This is also reflected in release of Kerala exclusive guide book from widely referred travel guide called lonely planet. Wide acclaim from reputed travel magazines like National geographic, Condi Nast traveler and high profile endorsement of destination by celebrities helped greatly to create a favorable image for destination in many of the generating markets.

Promotional initiatives also relied on media like web and direct marketing route. A highly interactive website, road shows in selected international and domestic markets, high quality brochures and CDs as promo materials were some of the additional promotional initiatives which reflect the strategic approach to marketing the state undertook. These promotional efforts combined with the participation in the international travel fairs in key markets created a synergistic effect in attracting both the international and domestic tourists to the state (TCS, 2000).

Private sector participation in all platforms – whether in policy making, promotion and product development was a distinctive feature of tourism development pursued in Kerala (WTTC, 2002). In fact

KTM, the mega marketing event of the state for tourism, is the initiative of the private sector, conducted in partnership with the government, demonstrates the active involvement of private sector in the tourism planning and development activities. Clearly, the many levels of cooperation and partnerships developed between the government and various other stakeholders formed the basis for many tourism development efforts: public- private sector joint venture for infrastructure development; joint marketing efforts with other southern states; committees for coordination between departments, enabling investment climate and tourism related facilities and services improvement; and district tourism promotion councils for decentralization of tourism development (Kerala Tourism, 2007).

Quality assurance and control efforts were also targeted at these major tourism products like house boats and ayurvedic rejuvenation centers and hotels. This include gold star and silver star certification for houseboats based on materials used for their construction, facilities offered by them, the quality of furniture, services, and the safety and security measures. For promoting eco friendly measures among houseboats, green palm certification is launched. For ensuring the quality, safety and service standards of the ayurvedic centers, Green Leaf<sup>®</sup> and ‘Olive Leaf’ Certifications are given based on the evaluation of the authenticity of the treatment provided, the training of the staff, the conveniences and amenities, and the quality of furniture (TCS, 2000).

Another certification scheme launched is to certify hotels as STEP<sup>®</sup> (Safe-To-Eat Places) Certification based on their hygiene and quality standards in the preparation and serving of cuisine. In addition to the improvement quality of the core attractions, the government has taken initiatives to improve the facilitation services which include expanding the network of tourism information centers and convenience facilities such as toilets, communication and related services at all important locations (Kerala Tourism, 2007).

### The Importance-Performance Technique

Systematic approaches to quality measurement with easy to use and reliable measures are important for service firms, especially when there are only fewer objective measures of quality by which to judge their production (Hudson and Sheppard, 1998). In turn, this will help managers to know better what aspects of a service best define its quality and can prepare the organization to take up a competitive position based upon its ability to deliver what customers demand (Cronin and Taylor, 1992).

In response to the growing importance of service quality as a means of gaining competitive advantage, researchers have developed more detailed attribution techniques aimed at measuring customer perceived service quality within the services sector (e.g. Parasuraman, Zeithaml and Berry 1985; Cronin and Taylor, 1992). The majority of these studies have adopted the expectancy - disconfirmation paradigm, which defines quality as a disconfirmation of expectation to performance. The most popular use of the disconfirmation approach is of Parasuraman, Zeithaml and Berry (1985) and the development of their SERVQUAL instrument. Despite its popularity, SERVQUAL instrument has limitations due to its generic dimensions, which are found not consistent across industries. Furthermore, the practical difficulty of assessing expectations and performance separately, and the complexities regarding the nature of how expectations are formed (Brown, Churchill and Peter 1993; Zeithaml, Berry and Parasuraman, 1993) limits its usage. The need to simplify and improve the reliability of the measurement of service quality has lead researchers to develop more direct approach using performance-only based measures of service quality. Principal amongst these has been the work of Cronin and Taylor (1992) and the development of the SERVPERF technique.

Another direct measurement technique is the Importance-Performance analysis (IPA) technique which emerged from the earlier work of Martilla and James (1977). Unlike SERVPERF, the Importance-Performance technique allows simultaneous comparison of direct performance measure of service quality to the importance rating given by customers for the various quality items being evaluated. The inclusion of customer preference rating in IPA gives a better picture of customers' quality assessment of product or service. According to Barsky (1995) such relative assessments pinpoint clearly the quality aspects of product or service which contributes greatly to customer satisfaction. As a result the information derived out of importance-performance analysis (IPA) can aid the development of more focused marketing strategies ((Ford et al., 1999). This view is confirmed by Lovelock, Patterson and Walker (1999) who state that importance-performance analysis is a useful management tool which can help firms to redirect their scarce resources from low impact areas to high impact areas. This technique is also called Key Driver Analysis.

In IPA, customers perception and importance values are plotted on a grid that is divided into 4 quadrants, formed based on the mean scores of the importance perception ratings. The values are then assessed according to its position in the quadrant on the grid. Each quadrant suggests different response from a marketing strategy point of view. Attributes that are rated high in importance and high in performance / perception score suggest that service providers keep up the ‘good’ work and increase resources directed towards these areas. In contrast, attributes having low importance rating and a low performance rating suggest that investing resources to these areas may offer only little advantage. Attributes that are rated high in importance and low in performance are areas that the providers should pay particular attention for improvement. Lastly, attributes rated low in importance and high in performance are areas providers should continue to maintain the level of effort. The beauty of IPA is that it can help a business understand what its customers feel is important to it across a number of relevant variables.

As noted elsewhere, this paper reports the application of the Importance-Performance measurement technique within the tourism sector for an integrated tourism product like destination, and tries to develop implications for destination marketing. Researchers have used IPA framework for service quality research in travel and tourism (Evans and Chon, 1989; Go and Zhang, 1997, O’Neill et al., 2002). Most of these studies assessed service quality assessment for specific tourism products. As an extension of its use, this study attempts to use IPA for evaluating international tourists’ perceived destination attractiveness for Kerala. In this regard, destination attractiveness is represented in terms of various tourist attractions and experience elements identified in the qualitative phase of the study, for its inherent appeal to attract tourists to the destination in the first place. Many destination elements like safety, access, transportation, information provisions were not included in this study, owing to the fact that these elements rarely attracts tourists to a particular destination, even though they can influence the tourists’ holiday satisfaction to an extent.

### Research Method

The research followed a two-stage methodology, comprising qualitative and quantitative stage. The qualitative stage involved analyses of various brochures, interviews with experts from the tourism industry and free response survey with tourists as part of knowing the various relevant destination attraction and experience elements relevant to Kerala holiday experience. This information is used for the subsequent quantitative study carried out using a survey method with a structured questionnaire to get the data from the international tourists visiting Kerala. Around 400 responses were obtained for analysis. Respondents selected were the international tourists departing the state through the two international airports in the State: Cochin and Trivandrum. The Control over the sample was exercised by limiting the number of tourists surveyed in a day and by selecting respondents at different time of the day.

Ideally for a study of this type, destination attribute importance needs to be measured prior to, rather than after, an actual purchase experience. But due to the practical difficulty in meeting tourists prior to the visit, importance ratings are taken at post consumption stage. Performance is then measured using the same set of attributes so that importance and performance of the destination can be directly compared for each attraction via the IPA plot (or grid). The mean values of importance and performance scores are then used as the crossing point in constructing the IPA grid.

Horizontal axis in the IPA grid indicates the tourists’ perception of the destination attraction and provisions measured in a 5 point impression rating scale. The vertical axis indicates the importance for the same destination attraction and provision elements measured in 5 point importance rating scale. Tourists’ perception rating and the importance rating for the fifteen destination attributes and activities used as input for the IPA is presented in Table 2.

The fifteen attributes are taken as a basis for destination attractiveness evaluation. Apart from using general attractions like climate, local culture representing overall destination appeal, tourists’ impression with specific attractions like backwaters, hill stations, and ayurvedic rejuvenation experience offered at the destination are included for assessing the destination attractiveness. As the assessment of destination attractiveness is from the tourist perspective, only tourism specific attractions and activities are included in the IPA.

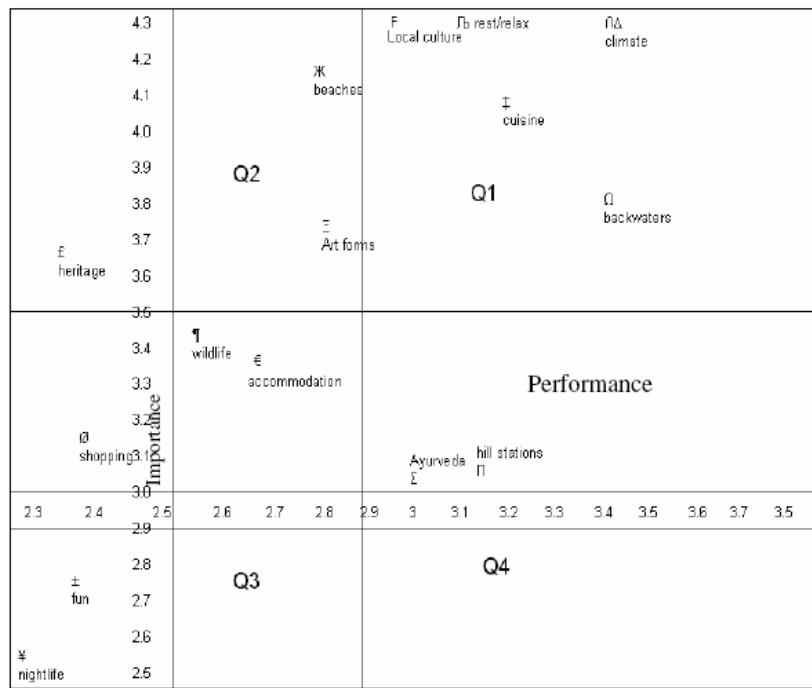
The study included both controllable and uncontrollable destination attributes. This is in contrast to many service strategy formulation studies, using IPA, where the general practice is to include only controllable variables. In such cases, IPA is used as a prescriptive tool for directing or redirecting resources to different service quality areas. In this study, the focus being on assessing destination attractiveness quality of a

destination, both controllable and uncontrollable factors are used. For example, attributes like local culture and many natural attractions like wildlife and hill stations are difficult to improve beyond a level for they are resources given for developing tourism. Such attributes are included in this study because here IPA is used as a descriptive tool to understand the destination attractiveness. As a descriptive tool, here IPA is used both for indicating the need for improvements in some key destination areas, as well as to reveal the less controllable destination attraction elements on which destination promotion and positioning activities can be based. Moreover, another reason for such a choice is that most of the attributes used in this study are assessed at an aggregate level.

**Table 2. Importance-Performance Means**

<b>Destination Attraction</b>	<b>Mean Importance</b>	<b>Mean Performance</b>
beaches	4.11	2.83
wildlife	3.47	2.57
climate	4.34	3.38
ayurveda	3.00	3.09
cuisine	4.04	3.21
heritage sites	3.66	2.34
art/craft forms	3.79	2.86
hill stations	3.02	3.10
backwaters	3.81	3.47
shopping	3.14	2.46
nightlife	2.22	2.07
Adventure & fun activities	2.71	2.44
rest and relax environment	4.5	3.13
Accommodation standards	3.4	2.73
local culture	4.4	2.95

The average level of rating with various attractions of Kerala and the average importance of the attractions for tourists were calculated for the whole sample. As part of assessing destination attractiveness matrix, these mean scores were plotted in an Importance –Performance rating matrix as shown in figure 2. The grand means for impression rating ( $x= 2.95$ ) and importance ( $y = 3.5$ ) determines the placements of axes on the grid. Each attraction is then assessed by locating in the appropriate quadrant. Tourists' perception and importance values are plotted on the grid that is divided into 4 quadrants that are formed based on the mean scores of the importance perception ratings. These values are then assessed according to the quadrant on the grid it is placed. Each quadrant suggests a different response from the destination marketing strategy point of view.



**Fig. 2. Importance-Performance Matrix**

Destination Attractions and provisions that are rated high in importance and perception scores are areas of strength for the destination appeal and consequently the destination marketing activities can be more focused on these elements. Areas having low importance rating and a low perception rating indicate destination attractions which can be regarded as peripheral to the core destination appeal, and therefore require less of destination development and marketing efforts. Attractions and provisions that are rated high in importance and low in perception are areas that destination marketers should pay particular attention for development and repositioning in the destination marketing activities. Lastly, areas rated low in importance and high in perceptions are attractions where destination marketing can continue to maintain the same level of effort because of the less scope for enhancement in the level of tourists' satisfaction through these areas.

### Analysis and Discussion

Plotting destination attractions and experience elements in an Importance – Performance matrix reveals that climate, backwaters, local cuisine, rest and relax environments, and local culture falls in the quadrant 1 (high important and high impression). As destination attractiveness elements, these attributes can be viewed as the strength of the destination appeal for the international tourist market in Kerala, and suggest key areas on which destination marketing activities can be further developed. What is interesting is the representation of local cuisine as an important dimension of destination quality assessment, and furthermore, its significance suggests that this attraction can be further highlighted in the destination promotion activities. Similarly, the presence of backwaters, local culture, rest and relax environments in this quadrant projects certain unique characteristics determining core appeal of the destination, which can be further packaged effectively in the destination positioning exercises.

Destination attraction elements falling in quadrant 2 (high important and low impression) are beaches, art / craft forms and heritage attractions , and therefore these are destination attraction areas where destination development and marketing efforts need more attention to turn them into areas of perceived strengths for the destination. Comparing the relative positions of the attractions in this quadrant, reveal that beach attractions being placed higher in the quadrant offers more potential in improving the destination attractiveness for Kerala. Therefore, beach attractions, one of the important attractions for the destination,

needs more attention in development and marketing for enhancing the quality of beaches and its appeal. Though somewhat less in significance, other attractions like art forms and heritage sites, identified by their position in IPA matrix, too needs further improvement in their development and therefore should form an important part of destination development activities for Kerala to attract international tourists.

Destination attractions and elements which fall in the quadrant three are wildlife attractions, accommodation standards, shopping, nightlife and adventure & fun activities (low importance and low impression). At an aggregate level of assessment, these destination quality elements appear less significant for enhancing the destination appeal for international tourists compared to other attractions in quadrant 1 and quadrant 2. This finding, especially with regard to accommodation, appears contradictory to some of the insights obtained during the initial qualitative stage of study using interviews with tourists and managers where the importance accommodation was repeatedly highlighted by the respondents. It is also possible that true nature of importance of some of these attributes may be masked in this IPA analysis. In fact, some of these attractions and provisions, especially accommodations, can be more of dissatisfier than as a satisfier, that is, a drop in the performance level of these provisions may significantly alter the tourists' satisfaction levels. The lower position of nightlife and adventure/fun activities in this quadrant clearly indicates that these areas are less important as far as Kerala is concerned and therefore needs less effort as part of destination development activities, compared to other areas of attractions. However, using proper segmentation studies, the potential to attract particular segments of tourists with high preference for these attractions needs to be further explored.

Lastly, Destination attractions spotted in the quadrant 4 (low importance, high impression) are ayurvedic rejuvenation attraction and hill stations. The indication is that at an aggregate level of assessment as destination attraction elements, they are perceived better than what is expected. Nevertheless, the possibility of unique segments of tourists who seek high levels of quality from ayurvedic rejuvenation experience and hill station attractions may necessitate the importance of taking initiatives to improve quality in these attractions.

### Conclusion

During the last decade, tourism in Kerala has made a spectacular performance. From 1999 onwards, consecutively for three years, Kerala Tourism has got the Best Performing Indian State award. Some of the main tourism development initiatives taken by Kerala which enabled it to become one of the leading destinations internationally are:

- Focused marketing efforts within a limited budget, developed in active partnership with private sector, leading international travel firms and agencies.
- Early lead in formulating comprehensive tourism policy, guiding and setting long term vision and goals for the tourism sector growth.
- Successful differentiation of the destination using effective positioning strategy, and benchmarking the performance with the neighboring leading international destinations, in the process, developed a distinct image as a stand alone destination from India and the rest of the states.
- Development of an array of tourism products of world class appeal mostly based on resources available locally.

Added to these, the socio-economic context of Kerala defined by the high level of social development and the contrasting industrial backwardness turned out to be a perfect setting for promoting Kerala as an unspoiled destination with exotic characteristics. In most parts of Kerala, the movement from an agrarian society to the present day information society was bypassing the intermediate stage of the industrial society (Govindan, 1996).

With the simultaneous consideration of tourists' assessment of the importance of salient attributes for the destination experience and their level of impression with the destination attributes, we have used the IPA to associate tourists' destination quality perception and their requirements. Being focused on an overall assessment of the total destination experience, destination attractions and provisions are measured at an aggregate level. Nevertheless, as a starting point, this is sufficient to provide the essential insights on destination attractiveness as perceived by the tourists. The analysis has revealed the strengths and weakness of the destination from a demand side perspective. We discovered that most of the attraction elements that are considered as important by the international tourists visiting the state have an above average

performance rating, too. In the light of the above discussion, this is not something strange. In fact, the competitive advantage of Kerala is inimitable to a very great extent: for example, climate, culture, backwaters, etc are rated to be important attraction elements; they are also superior in performance. There are a few items in the fourth quadrant, which essential means that the state should not be committing much of its limited promotional budget upon promoting them. Instead, more attention may be focused up on promoting the beaches and the state's heritage: these are greatly expected, but low in performance. Kerala is a coastal state and beaches are one of its biggest assets. One reason why beaches do not perform up to expectations could be that the state government downplays beach tourism. Kerala wants to be a high end tourism destination and its government is worried that promotion of the beachside will push the state into a low end mass tourist haven. This could be a wrongly placed notion since previous research says that beach tourists visiting Kerala are high spenders; probably they spend more than those who visit in search of heritage and culture (Rajasenan and Kumar, 2002). Or, it may be that only high spending beach tourists visit Kerala due to the government's beach de-marketing efforts.

These are valuable inputs for destination promotion and positioning activities. The analysis indicated the importance of certain destination attraction elements like climate, backwaters, cuisine, and rest and relaxation environments, and local culture as strengths of the destination based on which destination promotional activities can be further reinforced. Areas where destination attractiveness gaps observed includes, beaches, art forms, and heritage attractions, and points to need for further emphasis on area specific development efforts to enhance the tourists experience with these attractions. With an array of attractions and experience elements provided at the destination, it may be useful to view the destination as a composite product, with certain attractions forming the core and the others at the peripheral, augmenting the tourists' experience of core attractions. In this conceptualization, attractions like nightlife, shopping and adventure activities may belong to a peripheral category; these attractions also need improvement efforts, but to a less extent, as compared to some of the core attractions. Overall, findings indicate the need for different strategies for guiding both the product and promotional development activities targeted for different tourism products.

It may be recalled that the destination quality attributes generated through the qualitative phase of the study included both controllable and non-controllable items. This is because, in addition to the purpose of correcting and diagnosing problems for the core destination management activities, the use of non-controllable items (culture, environment, climate etc) included in this study provided better quality assessment of the destination based on tourists' perspective, considered as a useful input for destination marketing programmes.

We do not argue that a democratic state like Kerala should devise its tourism strategy purely based on the whims and fancies of the tourists (Sreekumar and Govindan, 2002). There can be important priorities for the state: for instance, Ayurveda (an alternative medical treatment) is in the fourth quadrant: marketing research may dictate that it be neglected. But, it gives employment to a lot of people and is an important reflection of the state's culture. In such cases, international market segments that do not currently patronize the state but which consider these types of products as important should be identified and cajoled with suitable promotional schemes. This is true in general: an importance-performance analysis is merely the perceptions of the currently patronizing segment. It does not mean that some attractions considered unworthy by these segments will never be sold or that these attractions need not be preserved. There could be a market segment waiting somewhere for every type of product: real success lies in identifying it (Levitt, 2004).

Some noteworthy limitations of the study can not go unmentioned: as this study is done for whole of the destination, detail evaluation of specific quality dimensions of each attraction was not evaluated. Further, as the data from the sample was aggregated, the data may only represent an overall view of destination attractiveness as perceived by the international tourists. International tourist market to Kerala can be segmented on various relevant segmentation variables, and destination attractiveness assessment for specific tourist segments may reveal more information regarding destination attractiveness for Kerala. Therefore, future research should focus on these areas. Future research can also be undertaken, exclusively focusing on various destination quality elements such as safety, hygiene, access, tourist information etc to identify destination service quality gaps.

It may be noted that this study is done purely for international tourists visiting Kerala. Given the volatile international tourism environment, no sensible destination management authority can neglect the importance-performance ratings for the state's attractions given by the domestic tourists. Thus, final tourism policy outcomes should be informed by the collective viewpoint emerging from the IPAs of

domestic and international tourist segments. As the next step, destination attractiveness assessment should be also done for domestic tourists visiting Kerala as well. Most importantly, this helps in identifying areas of overlap: these are areas where you can gain more customers with less spending.

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