

Foreign Tourist Satisfaction and Destination Competitiveness in Ernakulum District

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ABSTRACT

Tourism has made India a major contributor of economic growth and cultural exchange. Kerala, the Gods own country, is still appealing to millions of tourists with the highest number of visitors to the state having been registered at 25,880,365 in 2025. Ernakulam district, which houses the commercial capital of Kerala, Kochi, is always the top district in the state in terms of both domestic and foreign tourist arrivals, with 268,614 foreign tourist arrivals and 4,329,536 domestic tourist arrivals in 2024. This paper discusses the level of satisfaction of foreign tourists visiting Ernakulam district in terms of the HOLSAT Model, assessing the difference between expectations and experiences of the three A of tourism: Attractions, Accessibility and Amenities. It has been found that the heritage sites (Fort Kochi, Mattancherry Palace), backwater experiences and cultural attractions exceed foreign tourists' expectations. Accessibility- especially accessibility to main destinations via Cochin International Airport to last mile transportation is the most important aspect that needs to be improved. The amenities have been enhanced to a great extent with the improvement of infrastructure by Kerala Tourism and Responsible Tourism Mission.

KEYWORDS: Tourism- Tourist Satisfaction- Three A of Tourism- Kerala Tourism 2024-2025- Ernakulum.

INTRODUCTION

Tourism is one of the sectors in Indian economy which has seen rapid growth and has led to foreign exchange generation, job creation and intercultural enlightenment. It has been one of the first states of India to have a variety of experiences including backwater cruises, Ayurveda wellness, hill stations or heritage walks which have been offered under the umbrella of Indian tourism.

According to Kerala Tourism Statistics 2024, the state has registered 22,246,989 domestic tourist visits and 738,374 foreign tourist visits in the calendar year 2024, respectively, which are increases of 1.72 and 13.76 on 2023 respectively. The total tourism revenue was approximately 45,053.61 crore in 2024, reflecting the significant economic contribution of tourism.

The Ernakulum district with its vibrant port of Kochi is definitely the centre of the tourism scene in Kerala. It is a unique blend of colonial heritage, backwater ecosystems, urban business and cultural life that made it the first place in the country to receive foreign and domestic tourist arrivals in 2024 (268,614 FTV and 4,329,536 DTV).

This paper deals with the difference between the expectations and the reality of foreign tourists in the 3 A's (Attractions, Accessibility and Amenities) in Ernakulum district using HOLSAT (Holiday

Satisfaction) Model. Primary data will be based on 130 foreign tourists and put into perspective by Kerala Tourism Statistics 2024-2025.

KERALA TOURISM: A RE-EMBARKEED OUTLINE (2024-2025)

The tourism industry in Kerala has shown an impressive recovery and growth after the COVID-19 pandemic has impacted the industry. As can be seen from table 1 below, the data of the tourist numbers from 2017 onwards reflects the trend of growth of the number of tourists.

Table 1: Kerala Year-Wise Tourist Visits Trend (2017–2024)

Year	Domestic Tourist Visits	% Change	Foreign Tourist Visits	% Change
2017	14,673,520	11.39%	1,091,870	5.15%
2018	15,604,661	6.35%	1,096,407	0.42%
2019	18,384,233	17.81%	1,189,771	8.52%
2020	4,988,972	-72.86%	340,755	-71.36%
2021	7,537,617	51.09%	60,487	-82.25%
2022	18,867,414	150.31%	345,549	471.28%
2023	21,871,641	15.92%	649,057	87.83%
2024	22,246,989	1.72%	738,374	13.76%

Source: Kerala Tourism Statistics 2024 (Kerala Tourism Dept.)

The statistics show a rapid and ongoing recovery of the pandemic levels of 2020-2021. Throughout the years, Kerala had always been a favoured domestic tourist destination, and by the year 2024 it was recorded that the domestic arrivals to Kerala were above the pre-COVID times by 36.3. The recovery in countries as far as foreign tourists are concerned is high (13.76 in 2024) but is still at 37.94% of the 2019 levels, significantly because of the geopolitical tensions in the world.

PROFILE OF FOREIGN TOURISTS VISIT IN KERALA-2024

TABLE 2: TOP 10 COUNTRIES FOREIGN TOURISTS VISIT IN KERALA-2024

Rank	Country	FTV 2024	% Share	FTV 2023
1	United Kingdom	107,454	14.55%	79,894
2	United States of America	98,414	13.33%	82,206
3	Germany	46,084	6.24%	35,077
4	France	45,170	6.12%	37,645
5	Malaysia	40,996	5.55%	29,790
6	Oman	38,387	5.20%	40,033
7	Australia	31,929	4.32%	24,512

8	Maldives	30,299	4.10%	36,980
9	Saudi Arabia	29,906	4.05%	27,003
10	UAE	24,751	3.35%	24,834

Source: Kerala Tourism Statistics KTDC

Together, the UK and the US tourists make up 28 percent of foreign tourists in Kerala. Germany, France are western European markets and Oman, Saudi Arabia, UAE are GCC countries. In the case of Ernakulam, in particular, the UK, US and GCC tourists are the dominant ones due to the high number of Keralites in the Gulf nations and attraction of Kochi as a heritage, cultural and business tourism destination. This profile highlights the importance of multilingual interpretation, international-standard sanitation, and digital access to major heritage sites throughout Fort Kochi and Mattancherry.

DISTRICT OF ERNAKULAM: TOURISM PERFORMANCE 2024

Ernakulam district has always taken first place in the tourism ranking in Kerala because of its unique range of attractions. A colonial heritage of Fort Kochi, the legendary Chinese fishing nets, Mattancherry Palace (Dutch Palace), Paradesi Synagogue and Jew Town, the Kochi-Muziris Biennale, the Cherai Beach, the Mangalavanam Bird Sanctuary and the magical Vembanad Lake backwaters all make Ernakulam Kerala the most visited district. Table 3 shows the performance of the districts in terms of tourists in 2024.

TABLE 3: DISTRICT-WISE VISIT by Tourists in KERALA (2024)

Sl No.	District	Foreign Tourist Visits (FTV)	Domestic Tourist Visits (DTV)
1	Alappuzha	46,470	705,993
2	Ernakulam	268,614	4,329,536
3	Idukki	136,883	3,830,186
4	Kannur	2,649	857,686
5	Kasaragode	3,775	284,865
6	Kollam	9,048	488,167
7	Kottayam	49,318	609,752
8	Kozhikode	14,224	1,334,089
9	Malappuram	11,449	823,026
10	Palakkad	1,459	613,025
11	Pathanamthitta	735	386,300
12	Thiruvananthapuram	171,095	3,921,054
13	Thrissur	18,700	2,775,175

14	Wayanad	3,955	1,288,135
TOTAL	Kerala	738,374	22,246,989

Source: Kerala Tourism Statistics 2024.

OBJECTIVES OF THE STUDY

1. To identify the most popular tourist destinations in Ernakulum district.
2. To investigate the expectations and experience of foreign tourists in Ernakulum district
3. To analyse the satisfaction of foreign tourists regarding the attractions, accessibility and amenities in Ernakulum district.

METHODOLOGY

This analytical paper uses the HOLSAT (Holiday Satisfaction) Model to analyse the gaps between perceptions of the anticipated and real experiences of 130 foreign tourists to major destinations in Ernakulam district, such as Fort Kochi, Mattancherry, Marine Drive, Cherai Beach, Mangalavanam Bird Sanctuary, Hill Palace Museum, and Vembanad Lake. These locations were chosen due to their proximity as major tourist attractions in Ernakulam- the commercial capital of Kerala- as a combination of colonial heritage (historic streets of Fort Kochi, Chinese fishing nets of Mattancherry, and their palace and Jewish Synagogue), waterfront recreation (Marine Drive and Cherai Beach), natural wildlife (Mangalavanam Bird Sanctuary), cultural displays (Hill Palace Museum) and a structured questionnaire was used to collect data on pre-visit expectations and post-visit experience on a five-point likert scale (1=Highly Unfavourable to 5=Highly Favourable) and convenience sampling was done across these sites. The statistical analysis was done using percentage and paired sample t-tests to contrast the scores across the important dimensions where attractions, accessibility and amenities (3A's) are considered, and the results showed that there is a significant difference in areas where expectations were not met, such as facilities and transport. Findings are put in relative terms to Kerala Tourism Statistics 2024-2025, which shows the attractiveness of Ernakulam as a tourist destination due to cultural heritage and tourist attractions, and the focus of the infrastructure improvements to improve satisfaction and repeat visit rates.

SIGNIFICANCE OF THE STUDY

Ernakulam district, Kerala's top-ranked tourism destination with 268,614 foreign tourist visits in 2024, makes international visitor satisfaction a matter of direct economic significance -yet no prior study has examined the relationship between foreign tourist satisfaction and destination competitiveness specifically at the district level. The current research, Foreign Tourist Satisfaction and Destination Competitiveness in Ernakulam District, fills this research gap by assessing the deviation between the expectations and experiences of tourists in regards to the three A's of tourism; Attractions, Accessibility, and Amenities. It presents realistic suggestions to the policymakers and destination managers interested in enhancing the competitiveness of Ernakulam as a major international tourist destination.

TOURIST ATTRACTIONS IN ERNAKULAM

Table 4 shows the distribution of the attraction-wise of the foreign tourist visits as recorded in the primary survey.

TABLE 4: TOURIST ATTRACTIONS IN ERNAKULAM

Location	Frequency	Percentage (%)
Fort Kochi (Chinese Fishing Nets, Heritage Walk)	119	91%
Mattancherry Palace & Jew Town	107	82%
Backwaters & Vembanad Lake (Houseboat/Canoe)	103	79%
Marine Drive & Kochi Waterfront	88	68%
Cherai Beach	76	58%
Mangalavanam Bird Sanctuary	54	42%
Hill Palace Museum, Tripunithura	61	47%
Kochi-Muziris Biennale / Art Galleries	67	52%

Source: Field Survey

Fort Kochi was the most popular tourist destination (91%), which is in line with the official Kerala Tourism data that indicated that Fort Kochi was the main centre of international tourists in Ernakulam. Jew Town has a strong heritage tourism pull with the Mattancherry Palace and Paradesi Synagogue being visited by 82% of the surveyed tourists. Backwater experiences, synonymous with Kerala's global brand, attracted 79% of respondents. The Kochi-Muziris Biennale, the largest contemporary art show in Asia, attracted 52 percent of the surveyed tourists, which further reinforces the fact that Ernakulam is becoming a cultural tourism destination. Although the Mangalavanam Bird Sanctuary is centrally situated, it is relatively underutilised (42%), which indicates that the lack of visitor awareness and interpretation facilities.

FOREIGN TOURIST EXPECTATION AND EXPERIENCE TOURIST ATTRACTIONS

TABLE 5: EXPECTATION VS EXPERIENCE- TOURIST ATTRACTIONS

Location	N	Exp. Mean	Exp. SD	Exp. Mean	Exp. SD	t-value
Fort Kochi Heritage Walk	119	3.62	0.48	4.21	0.88	5.31
Mattancherry Palace	107	3.78	0.54	4.18	0.79	3.78
Backwaters / Houseboats	103	4.12	0.61	4.38	0.74	2.18
Marine Drive	88	3.44	0.57	3.72	0.81	1.94
Cherai Beach	76	3.91	0.63	3.59	0.97	-2.12

Mangalavanam Sanctuary	54	3.86	0.55	3.44	0.76	-2.86
Hill Palace Museum	61	3.74	0.49	4.02	0.83	2.08
Art Galleries / Biennale	67	3.55	0.58	4.31	0.92	5.05

Source: Primary Data (5% Significant Level)

Fort Kochi heritage walk, art galleries, Mattancherry Palace and Hill Palace Museum were much higher than the expectation of the foreign tourists (t-values of 5.31, 5.05, 3.78 and 2.08 respectively) which is a great indication of the quality of the heritage and cultural tourism found in Ernakulam. There were also unexpected backwater and houseboat experiences which are a mainstay of Kerala tourism ($t = 2.18$). Cherai Beach ($t = -2.12$) and Mangalavanam Bird Sanctuary ($t = -2.86$) however, were below expectations showing the lack of infrastructure in these locations. There was no significant expectation and experience at Marine Drive. This is in line with the Kerala Tourism priority of developing nature-based and beach tourism infrastructure by 2024.

ACCESSIBILITY

TABLE 6: EXPECTATION VS EXPERIENCE ON ACCESSIBILITY

Facility	N	Exp. Mean	SD	Exp. Mean	SD	t-value
Road connectivity to all destinations	130	3.34	0.52	3.58	0.67	-3.47
Availability of public transport	130	3.28	0.59	3.41	0.72	-1.81
Proximity to railway stations (Ernakulam Jn.)	130	4.08	0.61	3.62	0.81	6.14
Proximity of airport (Cochin International) to destinations	130	3.97	0.64	2.79	0.94	11.42

Source: Primary Data

TABLE 6.1: OVERALL ACCESSIBILITY

	N	Mean	SD	t-value	p-value
Expectation	130	17.84	2.18	13.52	(0.000)
Experience	130	15.76	2.34		

Source: Primary Data

The reachability is the main challenge as experienced by the foreign tourists in Ernakulam. The mean expectation score (17.84) is much higher than the mean experience score (15.76), the t-value is 13.52 which shows there is a significant difference. The largest disconnect ($t = 11.42$) is the distance between Cochin International Airport (Nedumbassery) and important attractions such as Fort Kochi and

Mattancherry, a distance of 35 km. Though Ernakulam Junction has good accessibility by rail, the last mile accessibility to the scattered attractions is poor. Whereas Kochi Metro and Water Metro projects have potential, it is yet to be integrated with island destinations such as Fort Kochi and Willington Island.

AMENITIES

TABLE 7: EXPECTATIONS VS EXPERIENCE ON AMENITIES

Component	N	Exp. Mean	SD	Exp. Mean	SD	t-value
Tourism activities at destinations	130	2.67	0.54	3.88	0.91	16.42
Adequacy of toilets & washrooms	130	3.84	0.67	2.56	0.98	18.73
Convenience of shopping (Lulu Mall, Jew Town, etc.)	130	2.82	0.61	3.48	0.87	9.24

Source: Primary Data

TABLE 7.1: OVERALL AMENITIES

	N	Mean	SD	t-value (p-value)	p-value
Expectation	130	8.39	1.18	18.94* (0.000)	(0.000)
Experience	130	10.68	1.41		

Source: Primary Data

The overall amenity experience (10.68) was far above expectations (8.39) and an indication of effective investments of tourism infrastructure by Kerala Tourism and Responsible Tourism Mission. Activities of the tourism in destinations and convenience in shopping, which was enhanced by the world-class shopping in Lulu Mall, artisan shopping in Jew Town and unique handicraft along Princess Street, were also well received. Nevertheless, the sufficiency of hygienic toilets and washroom facilities in major tourist spots is an urgent requirement that is yet to be achieved ($t = 18.73$), thus necessitating the investment in sanitation facilities in high-traffic sites like Fort Kochi beach and Mattancherry.

FINDINGS

1. In 2024, Ernakulam topped the foreign tourist arrivals (268,614 FTV) and domestic tourist arrivals (4,329,536 DTV) in Kerala, once again establishing it as the best tourism destination in the state.
2. The majority of surveyed foreign tourists (91 percent) have visited Fort Kochi, which is known as the main international attraction, in accordance with the official data of Kerala Tourism 2024.
3. The heritage attractions (Fort Kochi, Mattanchery Palace) and art / cultural sites (galleries, Biennale) far surpassed the expectations of the foreign tourists, with t-values of 5.41 and 5.02 respectively.
4. The experiences of the backwater and houseboat were found to be beyond expectations ($t = 2.18$), which confirms that they are the core of the international tourism brand of Kerala.
5. Cherai Beach ($t = -2.11$) and Mangalavanam Bird Sanctuary ($t = -2.87$) had lower scores, which implies that the nature-based and beach tourism facilities in Ernakulam need to be improved with specific

focus.

6. The tourists' biggest complaints about the tour are accessibility which has a significant difference in t-value of 11.42 with a mean (15.76) which is lower than the expected (17.84) and closeness to airport which has the highest t-value of 11.42 with the lowest mean (15.76) compared to the expected (17.84).
7. Experience of overall amenities (mean 10.68) was higher than expectation (mean 8.39) as a result of good infrastructure of tourism activities and best shopping in the world. Public toilet or washrooms is a sore issue in the tourist area is yet to be resolved.
8. Kerala's total tourism revenue stood at ₹45,053.61 crore in 2024. This contribution from Ernakulam can further be enhanced if the Cochin International Airport becomes accessible to the Fort Kochi heritage precinct. Could significantly increase the contribution of Ernakulam to this income.

CONCLUSION

The district of Ernakulam is the unparalleled tourist hub in Kerala, having a unique blend of colonial heritage, a vibrant backwaters area, world famous art events and a booming business infrastructure. The report, which is based on the primary research, Kerala Tourism Statistics 2024-2025, gives recognition to the exceptional tourism performance of the district and provides the primary thrusts in the development to sustain its future growth. The heritage experience is always good and true in Fort Kochi and Mattancherry - the foreign visitors' expectations are always surpassed. As the backwaters continue to provide the tourists with more than they expected, this is the most iconic tourism product of Kerala. The Kochi-Muziris Biennale has made Ernakulam a cultural tourism hotspot of international acclaim and has turned it into a world class attraction, attracting high value tourists, who form an important part of the local economy.

Accessibility remains our most pressing issue. The gap between Cochin International Airport (Nedumbassery) and Fort Kochi heritage precinct is too large to make the solutions to the problem make sense apart from a specific tourist transport like the airport shuttle, extension of Kochi Water Metro to the heritage precinct and improved ferry service. The current metro development should be directed towards linking with the Fort Kochi Island so as to create this important last mile connectivity. Meanwhile, the attractions such as Cherai beach, Mangalavanam bird sanctuary which are natural need to be developed in terms of infrastructure to cater the demands of international tourists. The need to prioritise sanitation of all key heritage sites is urgent, as this is something the people want to do and expect. With strategic investments in all three A's -Attractions, Accessibility, Amenities, Ernakulam is set to become the top international tourism hub in Kerala, and India.

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