



Nangia Andersen LLP

A member firm of **ANDERSENGLOBAL** 



**Tourism Investment Potential  
Report 2021**



## Foreword



Tourism sector makes a significant impact on the economy of our country. Asia-Pacific was the fastest growing region in 2019 with Travel & Tourism GDP growing by 7.4%. Prior to the pandemic, Travel & Tourism accounted for 1 in 4 of all new jobs created across the world, and 10.4% of global GDP (US\$9.2 trillion).

According to World Travel & Tourism Council (WTTC), as a result of COVID-19 and the ongoing restrictions to international mobility, the Travel & Tourism sector suffered losses of almost USD 4.5 trillion, with its global contribution to GDP declining by 49.1% compared to 2019 to reach only USD 4.7 trillion in 2020.

The lockdown restrictions due to pandemic has severely been affected the growth of the tourism industry due to the sharp dip in the number of incoming tourists. Apart from declaring short-term relief measures, governments throughout the world must cooperate together

with industry experts from both the private and third sectors to combat the pandemic and reduce its impact on millions of people's livelihoods. A lot of companies in this space have announced lay-offs besides putting their hiring plans on hold.

Tourism is thus a priority area for the Government due to its important contribution to job creation and bring much needed economic stimulus. The Central Government plays an important role in developing a strong visitor economy which is evident from the fact that the outlay for Annual Budget 2021-22 of Ministry of Tourism was revised to Rs. 2026.77 Crore as against the initial outlay (Rs. 1260.00 Crore) approved for the Budget Plan 2020-21.

The Ministry of Tourism has also undertaken a slew of initiatives such as creation of tourism infrastructure at different destinations spread over different States, tourism promotional activities to fuel tourism growth. The remaining allocation of the budget would be used for funding other Schemes like Capacity Building for Service Providers, Champion Service Sector Scheme among others.

India's appeal in the global tourism market is determined by its capacity to offer world class infrastructure facilities. The critical infrastructure required for comfortable experience to tourists includes connectivity, tourists' facilities, maintenance and management of tourist attractions. Government recognizes this need and has introduced series of schemes such as PRASAD, HRIDAY and Swadesh Darshan amongst others to improve linkages between key

tourist locations which shall certainly provide much needed impetus to the tourism infrastructure of the country.

Looking ahead, the challenge lies in building the world class infrastructure, rationalize cost of land procurement and simplify licenses of land towards creating 'Brand India'. In order to achieve this, Government, Industry and Institutions must make collaborative efforts to create a supportive ecosystem for tourism.

I am pleased to present the FICCI - NANGIA ANDERSEN LLP Knowledge Report "*Tourism Investment Potential in India*" which captures the present tourism scenario, potential areas of development and proposes key interventions for India to secure a leading place on the global tourism map. I am confident that this document will facilitate a better understanding of the opportunities both by the government and private sector and will be instrumental in designing their interventions therein.

Sincerely,  
**Dr. Jyotsna Suri**  
Past President, FICCI & Chairperson, FICCI Travel, Tourism and Hospitality Committee & CMD, The Lalit Suri Hospitality Group



## Foreword



The Seven Wonders of the World became tourist sites for the travellers across the globe, tourism has been a global phenomenon from its origins. **Tourism**, across the world is an act & means of spending time away from home in pursuit of recreation, relaxation, and pleasure, in turn using the local services provided by the destination.

India is a colourful land of vibrancy where both traditional and modern spheres meet. The world's seventh largest nation by area and the second largest in terms of population, India possesses a rich heritage of various cultures and religions spread across. We offer the travellers with an opportunity to experience an array of sacred and spiritual sites, white exotic beaches, tropical rain forest, unlimited deserts and snow-clad Himalayas.

Tourism is a steadily growing and economically important sector, globally and locally. Domestic tourism is the backbone of the sector. Steady Tourism provides positive knock-on effects for various sectors and local communities

in tourism destinations, in terms of revenue and jobs. Growth of SME businesses, development of basic infrastructure & enhancing job opportunities are some of the goals that can be attained through a regular flow of tourists.

In the last two years we have seen Covid-19 has challenged human mobility and has put many people in temporary lockdowns. While in the short-term the picture for tourism is mixed, mainly due to an uncertain economic outlook and external shocks such as health crises and extreme weather events, over the long-term tourism is expected to continue to grow.

Government of India is adjusting its policies and putting in place strategies so that local communities, small tourism businesses and less developed destinations can fully share in the benefits of a dynamic tourism economy. Collaborated efforts of the Government, policy makers, industry and institutions are needed to create a conducive ecosystem for investors as well as tourists.

The digital economy is having a profound impact on the tourism sector, transforming the process of communicating with tourists and marketing tourism services, and opening up new and creative ways to deliver tourism services and enhance the visitor experience. The smart wine tourism initiative in the Napa Valley, United States, uses Wi-Fi, the Internet-of-Things, and geolocation software to target nearby tourists in a destination and invite them to enjoy a wine experience during their visit.

I feel that tourism success should not be measured solely by visitor numbers, but rather its ability to contribute to local economies and the net benefits it provides to destinations. Furthermore, sustainable tourism should not be considered a special form of tourism, but rather all forms of tourism should strive to be more sustainable. The New Zealand Tourism Sustainability Commitment is an industry-led initiative established by Tourism Industry Aotearoa, designed to guarantee that every New Zealand tourism business is committed to sustainability by 2025.

Our objective is to invite all the stakeholders to join hands to give a memorable experience to the tourists visiting the iconic sites in India.

I take this opportunity to present the **“The Federation of Indian Chambers of Commerce & Industry with NANGIA ANDERSEN LLP A Knowledge Report on Tourism Investment Potential in India”** which highlights potential areas of development, recent initiatives of the Government and key recommendations for establishing India as the world's most preferred travel destination.

I am sure that the contents of this study will be of significance value to all stakeholders and will support to accelerate the growth of India's tourism sector.  
Thank You.

Sincerely,  
**Suraj Nangia**  
Head- Government and Public Sector Advisory  
Nangia Andersen LLP

Title	Tourism Investment Potential in India
Year	September, 2021
Authors	Government and Public Sector Advisory, Nangia Andersen LLP
Copyrights	No part of this publication may be reproduced in any form by photo, photoprint, microfilm or any other means without the written permission of NANGIA ANDERSEN LLP Ltd. or FICCI
Disclaimer	This report is the publication of Nangia Andersen LLP and FICCI so Nangia Andersen LLP and FICCI have editorial control over the content, including opinions, advice, statements, services, offers etc. that is represented in this report. However, Nangia Andersen LLP, FICCI will not be liable for any loss or damage caused by the reader's reliance on information obtained through this report. This report may contain third party contents and third-party resources. Nangia Andersen LLP and/or FICCI take no responsibility for third party content, advertisements or third party applications that are printed on or through this report, nor does it take any responsibility for the goods or services provided by its advertisers or for any error, omission, deletion, defect, theft or destruction or unauthorized access to, or alteration of, any user communication. Further, Nangia Andersen LLP and FICCI do not assume any responsibility or liability for any loss or damage, including personal injury or death, resulting from use of this report or from any content for communications or materials available on this report. The contents are provided for your reference only. The reader/ buyer understands that except for the information, products and services clearly identified as being supplied by Nangia Andersen LLP and FICCI do not operate, control or endorse any other information, products, or services appearing in the report in any way. All other information, products and services offered through the report are offered by third parties, which are not affiliated in any manner to Nangia Andersen LLP or FICCI. The reader/ buyer hereby disclaims and waives any right and/ or claim, they may have against Nangia Andersen LLP or FICCI with respect to third party products and services. NANGIA ANDERSEN LLP and FICCI make no representation or warranty, express or implied, including, but not limited to, warranties of merchantability, fitness for a particular purpose, title or non – infringement. As to documents, content, graphics published in the report, NANGIA ANDERSEN LLP and FICCI make no representation or warranty that the contents of such documents, articles are free from error or suitable for any purpose; nor that the implementation of such contents will not infringe any third party patents, copyrights, trademarks or other rights. All materials provided in the report are referred from publicly available source. In no event shall NANGIA ANDERSEN LLP and FICCI or its content providers be liable for any damages whatsoever, damages arising from loss of data or information, loss of profits, business interruption, or arising from the access and/or use or inability to access and/or use content and/or any service available in this report, even if NANGIA ANDERSEN LLP and FICCI are advised of the possibility of such loss.

### Nangia Andersen LLP



**Poonam Kaura**  
Partner  
(Government & Public Sector Advisory)  
Mobile : +91 98108 93909  
Email: poonam.kaura@nangia-andersen.com



**Snigdha Jha**  
Lead Tourism  
(Government & Public Sector Advisory)  
Mobile: +91 99996 65475  
Email: snigdha.jha@nangia-andersen.com

**Website: www.nangia-andersen.com**  
**Registered and Head Office**  
**A-109, Sector-136, Noida (Delhi - NCR) – 201304, India**

### FICCI

**Manish Ahuja**  
Director & Head- Tourism  
FICCI  
Email: manish.ahuja@ficci.com

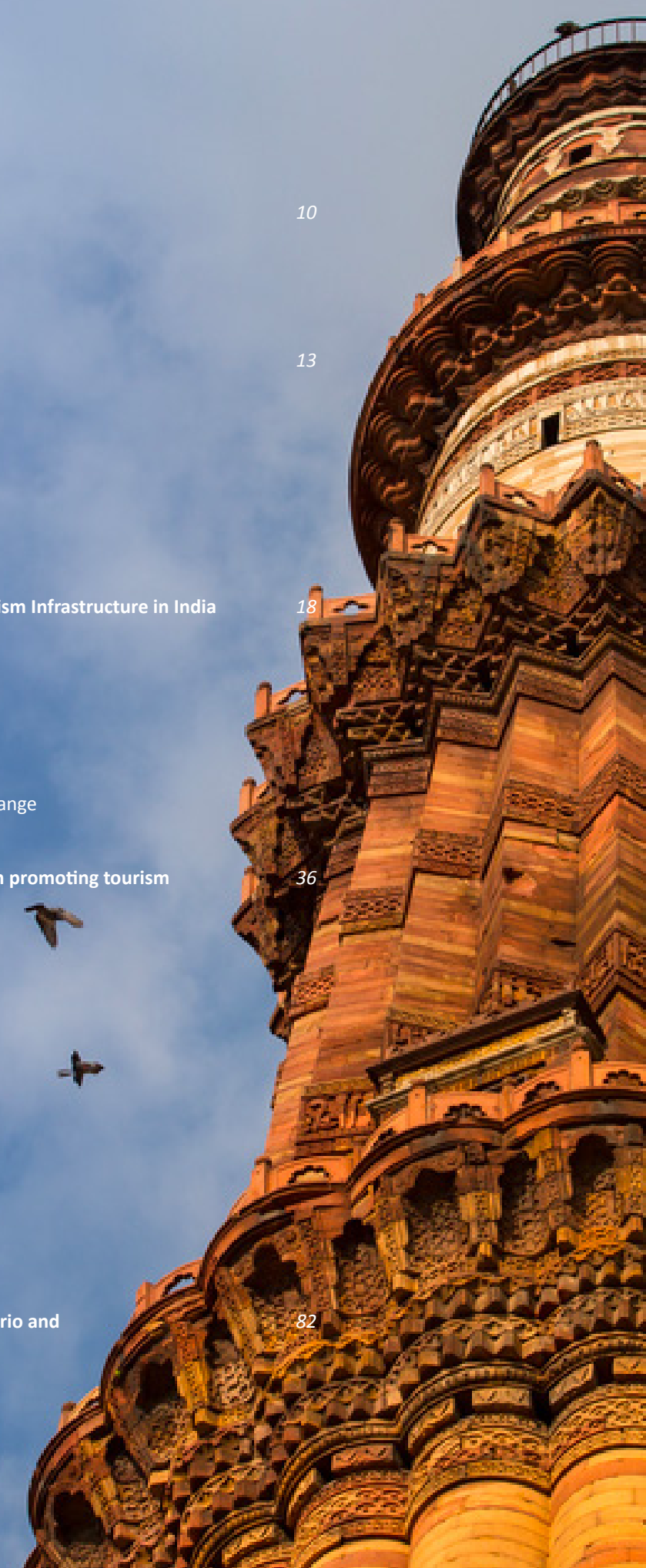
**Anirban Chatterjee**  
Additional Director  
FICCI  
Email: anirban.chatterjee@ficci.com  
Mobile : +919873578778  
**Website: www.ficci.in**  
**Address: Federation House, Tansen Marg, New Delhi – 110 001**  
Tel: +91-11-2331 1720





## Table of Contents

<b>1. Executive Summary</b>	<b>10</b>
<ul style="list-style-type: none"><li>• Background</li><li>• Impact of Tourism on Economy</li></ul>	
<b>2. Travel &amp; Tourism Outlook</b>	<b>13</b>
<ul style="list-style-type: none"><li>• Global Tourism Scenario<ul style="list-style-type: none"><li>- Total Contribution of Tourism to GDP</li><li>- Statistics related to global tourism sector</li></ul></li><li>• Indian Tourism Scenario<ul style="list-style-type: none"><li>- Total Contribution to GDP</li><li>- Key Statistics as per domestic sector</li></ul></li></ul>	
<b>3. Central Government Initiatives to boost Tourism Infrastructure in India</b>	<b>18</b>
<ul style="list-style-type: none"><li>• Ministry of Tourism</li><li>• Ministry of Culture</li><li>• Ministry of Civil Aviation</li><li>• Ministry of Road Transport and Highways</li><li>• Ministry of Railways</li><li>• Ministry of Shipping</li><li>• Ministry of Housing and Urban Affairs</li><li>• Ministry of Environment, Forest &amp; Climate Change</li><li>• Ministry of External Affairs</li></ul>	
<b>4. Key Initiatives taken by some leading States in promoting tourism</b>	<b>36</b>
<ul style="list-style-type: none"><li>• Bihar</li><li>• Gujarat</li><li>• Rajasthan</li><li>• Karnataka</li><li>• Maharashtra</li><li>• Chhattisgarh</li><li>• Jharkhand</li><li>• Odisha</li><li>• Tamil Nadu</li><li>• Madhya Pradesh</li><li>• West Bengal</li><li>• Kerela</li><li>• Haryana</li><li>• Manipur</li><li>• Andhra Pradesh</li><li>• Uttarakhand</li></ul>	
<b>5. Tourism Infrastructure in India: Current Scenario and Opportunities</b>	<b>82</b>



## Infrastructural Development with Emerging Tourism Themes

- Eco Tourism
- Adventure Tourism
- Coastal Tourism
- Film Tourism
- Spiritual Tourism
- Heritage Tourism
- Sports Tourism
- Wellness Tourism
- Agro Tourism
- Rural and Tribal Tourism
- MICE
- Caravan Tourism
- Pro Poor Tourism

## 6. Way Forward: Unleashing Investment Potential of Tourism Infrastructure Development in India through achieving Sustainable Tourism Development

94

## List of Figures

Figure-1: Foreign Tourist Arrival in India during 2010-2019	12
Figure-2: Total Contribution of Travel and Tourism to GDP in 2020	14
Figure-3: Capital investment in the travel and tourism industry in leading countries worldwide in 2019 (in billion U.S. dollars)	16
Figure-4: 7 days moving average of flights	21
Figure-5: Union Budget Allocation for Ministry of Road Transport and Highways	25
Figure-6: Major Road Development Program in North East region	27
Figure-7: Expenditure of Indian Railways from financial year 2001 to 2020 with an estimate for financial year 2021(in billion Indian rupees)	29
Figure-8: Andhra Pradesh Tourism Highlights	76
Figure-9: Ease of doing business and peace of doing business- Uttarakhand	80
Figure-10: Tourist Visits to Odisha in the last five years	41
Figure-11: Tourism Arrival Statistics in Gujrat	44
Figure-12: Tourism Arrival Statistics in Rajasthan	68
Figure-13: Major attractions in Kerela	69
Figure-14: Tourist Arrival in Kerela	69
Figure-15: Investment Opportunities in Kerela	69
Figure-16: Major Tourist Attraction in Chattisgarh	54
Figure-17: Tourism Arrival Statistics in Chhattisgarh	55
Figure-18: Beach Locations in India	86
Figure-19: Blue Flag Beaches of India	87
Figure-20: Famous Indian Sports Leagues	90
Figure-21: Sustainable Development Goals	100

## List of Tables

Table-1: Advantage of Investing in India	15
Table-2 : Types of Roads in India	24
Table-3: Bharatmala Phase-1 Development Plan	26
Table-4: Incentives for infrastructure development in Gujrat	42
Table-5: Road Network in Gujrat	42
Table-6: Some Major key attractions in Rajasthan	44
Table-7: Road Network in Rajasthan	45
Table-8: Road Network in Kerela	55
Table-9: Tourism Potential in Kerela	70
Tabel-10: Road Network in Chattisgarh	56
Table-11: List of major film cities in India	89





## Executive Summary

- Background
- Impact of Tourism on Economy



## Executive Summary

As one of the fastest growing economic sectors in the world, tourism is increasingly recognized as a vital contributor to employment and wealth creation, economic growth, environmental protection, and poverty alleviation. Therefore, a well-designed and managed tourism industry can help preserve the natural and cultural heritage assets upon which it depends, empower host communities, generate trade opportunities, and foster peace and intercultural understanding. Nevertheless, the growing number of people travelling domestically and internationally each year also produce pressures in terms of greenhouse gas emissions, economic leakages, resource management and impact on local communities and cultural assets. Therefore, the harnessing of tourism's positive contribution to sustainable development and the mitigation of the sector's adverse effects calls for strong partnerships and decisive action by all tourism stakeholders.

Tourism also has a great potential to accelerate progress across the Sustainable Development Goals (SDGs). If well managed, the sector can generate quality jobs for durable growth, reduce poverty and offer incentives for environmental conservation – a triple-win to help countries transition towards more inclusive, resilient economies. However, without proper safeguards and investments, expanding the tourism market will increase pressure on biodiversity and the ecosystems on which the livelihoods of so many people and local communities depend.

The COVID-19 pandemic has taken a significant toll on communities across the world and has had a devastating effect on Travel & Tourism. Tourism is a delicate and seasonal sector, and it depends on travellers' personal preferences, motivation and financial conditions. The outbreak of Covid-19 has been considered a watershed moment for economic activities and industrial sectors. World Travel and Tourism Council (WTTC, 2020) predicted 100.8 million job losses in the tourism sector due to the Covid-19 pandemic, which is 31% of the total jobs in this sector. The Indian tourism industry is one of the significant contributors to GDP as well as an employment provider (Annual Report 2019-20). In 2019, the tourism industry contributed 6.9% of India's GDP and 8% of its total employment (WTTC, 2020). This industry has healthy growth and is expected to grow at an annual rate of 3.5% (WTTC, 2020).

For a post COVID 19 revival, the Ministry of Tourism formulated Operational Recommendations in consultations with the State Governments and tourism/ hospitality stakeholders for different segments of Tourism Service Providers in the Travel sector for facilitating smooth and safe resumption of business, keeping in mind the overall guidelines issued by the Ministry of Health time to time.

Ministry of Tourism, India has taken up the initiative of identification, diversification, development and promotion of niche tourism products of the country like Cruise, Adventure, Medical, Wellness, Golf, Polo,

Meetings Incentives Conferences & Exhibitions (MICE), Eco-tourism, Film Tourism, Sustainable Tourism etc. and to overcome 'seasonality' challenge in tourism.

Travel and Tourism is one of the largest service industry in India. The industry has become one of the largest Foreign Exchange Earners in India with earnings of \$29.962 billion over Jan 2019 – Dec 2019 equating a growth of 4.8% over the previous year.



Today, tourism in India has become an important part of the economy contributing substantially to the inclusive and sustainable development of the country. India has succeeded in becoming the most preferred destination amongst domestic and overseas travellers. Tourism exposes international travellers to India's philosophy of unity in diversity. Over years the tourism sector has been instrumental in generating foreign exchange, creating employment opportunities, and generating household income for the citizens, as it has in many other developing economies. It has brought the opportunity of infrastructure development and helped in regional and economic development. Thus, the development of the tourism sector appears to have been as important as the development of other sectors of the Indian economy.

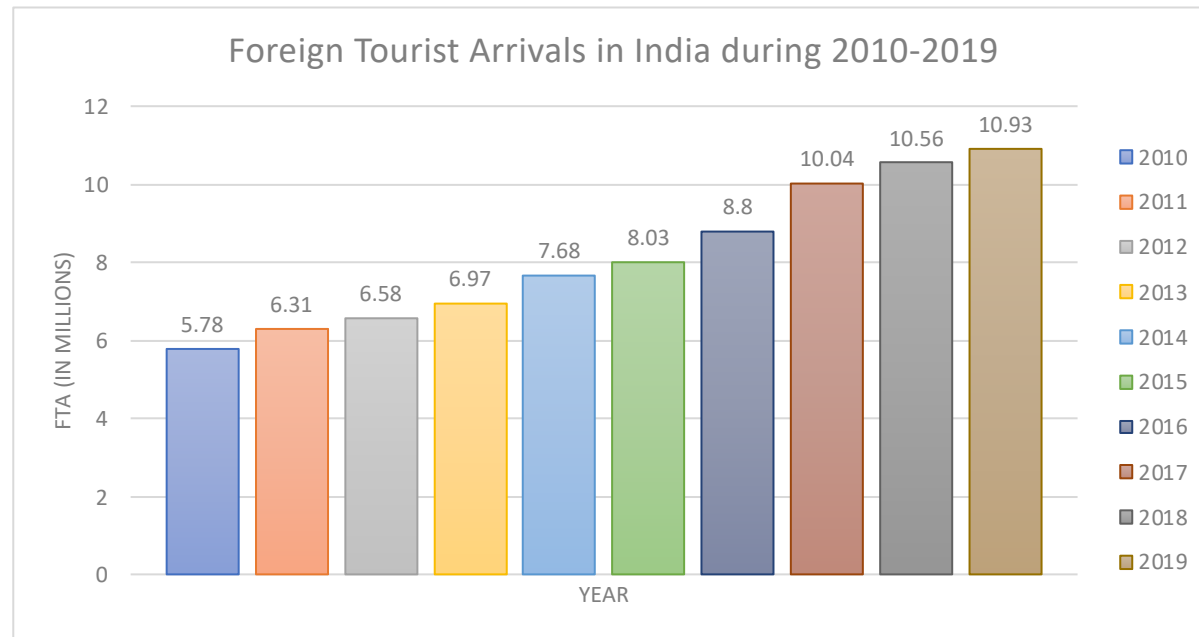
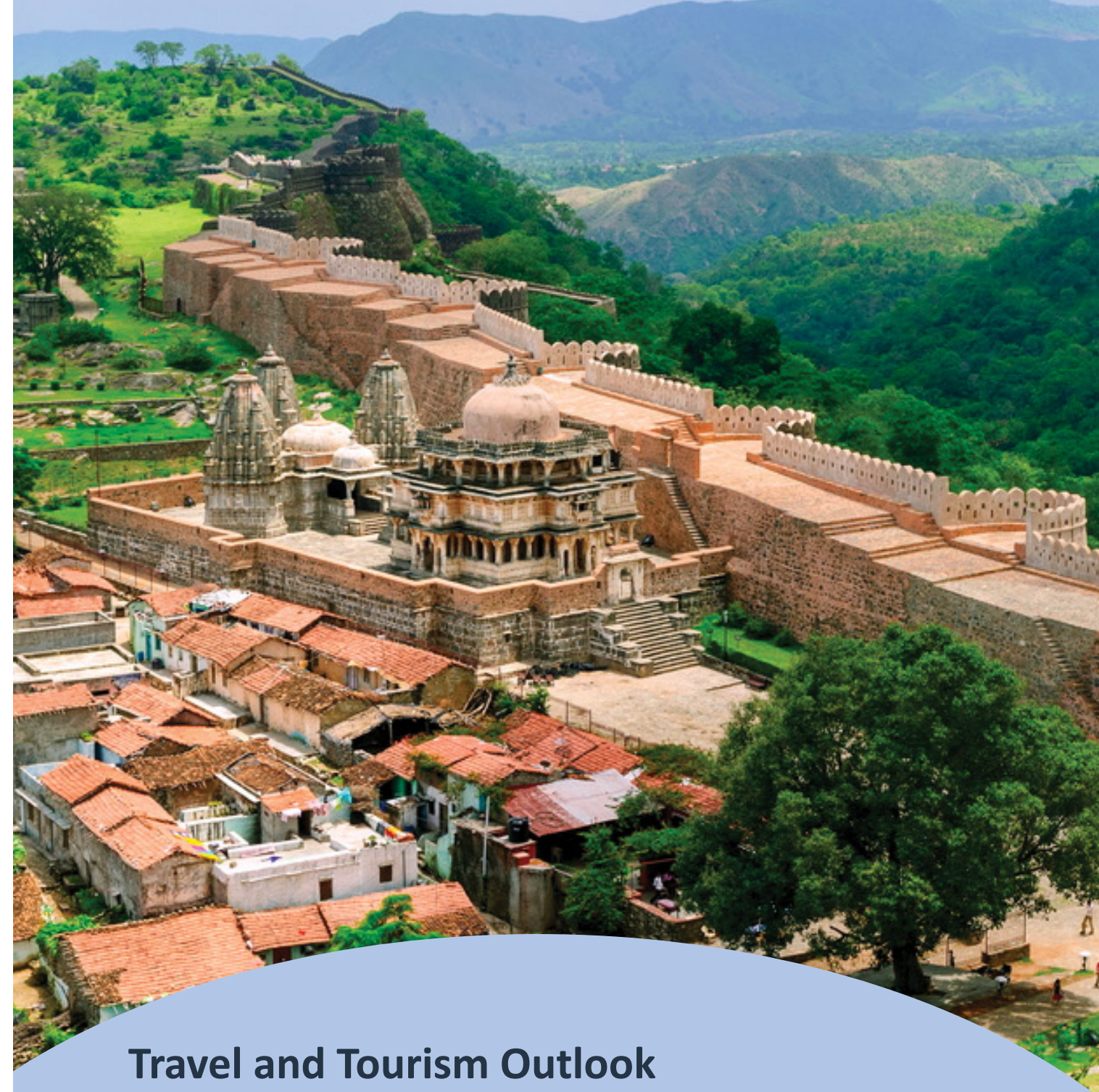


Figure-1: Foreign Tourist Arrival in India during 2010-2019



## Travel and Tourism Outlook

- Global Tourism Scenario
  - Total Contribution of Tourism to GDP
  - Statistics related to global tourism sector
- Indian Tourism Scenario
  - Total Contribution to GDP
  - Key Statistics as per domestic sector



## Global Tourism Scenario

Over the decades, tourism has experienced continued growth and deepening diversification to become one of the fastest growing economic sectors in the world. Modern tourism is closely linked to development and encompasses a growing number of new destinations. These dynamics have turned tourism into a key driver for socio-economic progress.

Tourism has become one of the major players in international commerce, and represents at the same time one of the main income sources for many developing countries. This growth goes hand in hand with an increasing diversification and competition among destinations.

Prior to the pandemic, Travel & Tourism (including its direct, indirect and induced impacts) accounted for 1 in 4 of all new jobs created across the world, 10.6% of all jobs (334 million), and 10.4% of global GDP (US\$9.2 trillion). Meanwhile, international visitor spending amounted to US\$1.7 trillion in 2019 (6.8% of total exports, 27.4% of global services exports).

According to World Travel & Tourism Council (WTTC), as a result of COVID-19 and the ongoing restrictions to international mobility, the Travel & Tourism sector suffered losses of almost USD 4.5 trillion, with its global contribution to GDP declining by 49.1% compared to 2019 to reach only USD 4.7 trillion in 2020; relative to a 3.7% GDP decline of the global economy. Domestic visitor spending decreased by 45%, whilst international visitor spending fell by an unprecedented 69.4%.

Asia-Pacific was the fastest growing region in 2019 with Travel & Tourism GDP growing by 7.4%. This was driven by the continued growth in middle income households, visa facilitation, improved connectivity, investment in infrastructure, and governmental prioritization of the sector. In 2020, however, due to COVID-19 related restrictions, it was the worst performing region, with the sector's contribution to GDP dropping by 53.7%. International spending was particularly affected, falling by 74.4% as many countries closed their borders to

inbound tourists. Meanwhile, domestic spending witnessed a lower decline at 48.1%. Across the region, Travel & Tourism employment fell by 18.4%, equating to 34.1 million jobs. Despite this decline, Asia-Pacific remains the largest region for the sector's employment in 2020, accounting for 55% (151 million) of all global Travel & Tourism jobs.

The Global Tourism industry's recovery is expected to be strong over the five years as the global economy strengthens. Despite some distressed areas due to conflicts or regional economic problems, several factors, such as expanding per capita disposable income and steady increase of global tourist arrivals, point toward strong tourism growth as the global economy puts the COVID-19 (coronavirus) pandemic behind it. Rising travel Global household income is expected to improve strongly over the next five years amid a positive global GDP forecast, as well as a low unemployment rate.

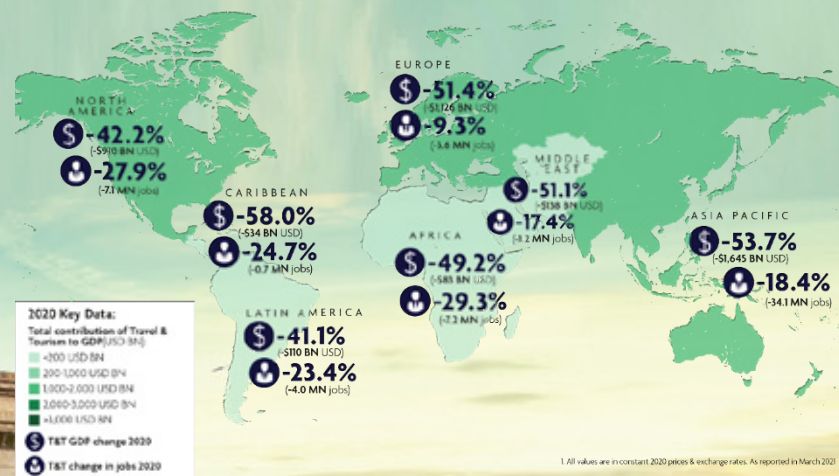


Figure-2: Total Contribution of Travel and Tourism to GDP in 2020

## Indian Tourism Scenario

The Indian tourism and hospitality industry have emerged as one of the key drivers of growth among the services sector in India. Tourism in India has significant potential considering the rich cultural and historical heritage, variety in ecology, terrains and places of natural beauty spread across the country. Tourism is also a potentially large employment generator besides being a significant source of foreign exchange for the country.

According to WTTC, India ranked 7th among 185 countries in terms of travel & tourism's total contribution to GDP in 2020. During 2019, contribution of travel & tourism to GDP was 4.7% of the total economy, ~US\$ 121.9 billion.

During 2019, foreign tourist arrivals (FTAs) in India stood at 10.89 million, achieving a growth rate of 3.20% y-o-y. During 2019, FEEs from tourism increased 4.8% y-o-y to Rs. 1,94,881 crore (US\$ 29.96 billion). In 2019, arrivals through e-Tourist Visa increased by 23.6% y-o-y to 2.9 million. In 2020, FTAs decreased by 75.5% YoY to 2.68 million and arrivals through e-Tourist Visa (Jan-Nov) decreased by 67.2% YoY to 0.84 million.

### Robust Demand

- By 2029, India's Tourism sector is expected to grow 6.7% to reach Rs. 35 trillion (US \$ 488 Billion), and accounting for 9.2% of the total economy.
- International tourist arrival in India is expected to reach 30.5 million by 2028.
- However, Domestic Tourism is expected to drive growth, post pandemic.

### Attractive Opportunities

- Government is providing free loans to MSME to help them deal with the crisis and revive the economy, including the tourism sector.
- Post the pandemic crisis, the government plans to tap into regional tourism by opening doors for South Asian country tourists
- While an air bubble agreement has been made with Sri Lanka, talks with Thailand are also in progress.

### Policy Support

- Campaigns such as Swadesh Darshan, a theme based tourist circuit was launched to harness the tourism industry's potential.
- Another new tourism policy focusing on developing medical religious tourism and adding more destinations to the prevailing ones is also under consideration.

### Diverse Attractions

- India offers geographical diversity, attractive beaches, 27 world heritage sites, 10 bio geographical zones, 80 national parks and 441 sanctuaries.
- The country's big coastline is dotted with several attractive beaches

Table-1: Advantage of Investing in India





India was globally the third largest in terms of investment in travel and tourism with an inflow of US\$ 51.6 billion in 2019.

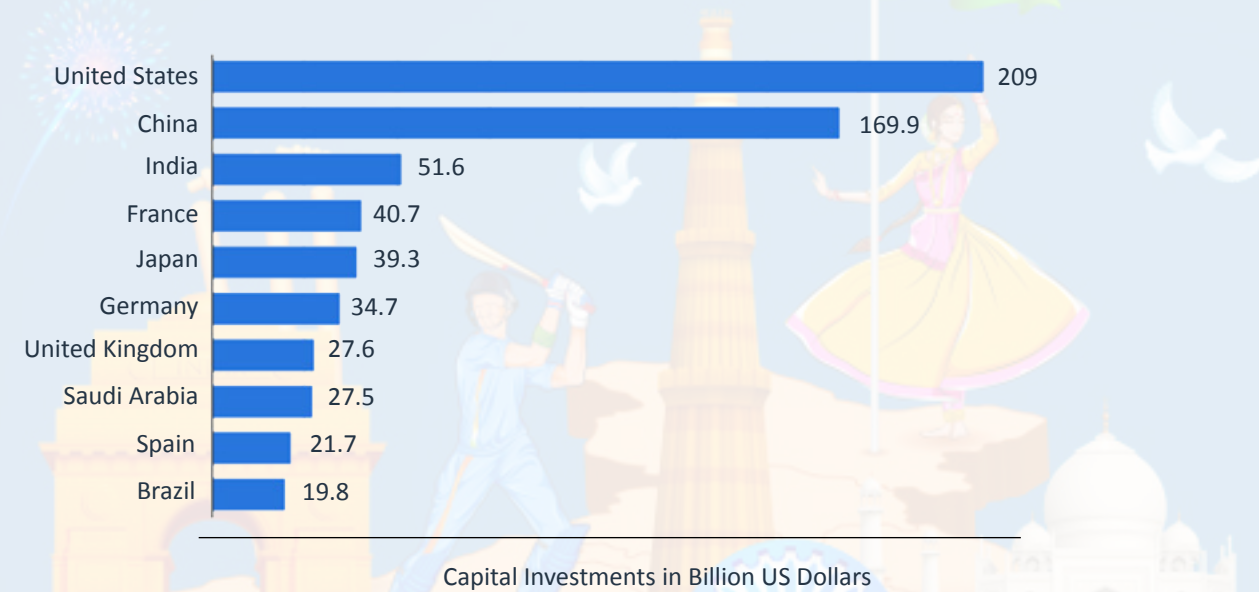


Figure-3: Capital investment in the travel and tourism industry in leading countries worldwide in 2019 (in billion U.S. dollars)  
Source: <https://www.statista.com/statistics/1093456/capital-investment-travel-and-tourism/>

Hotel and Tourism sector received cumulative FDI inflow of US\$ 15.61 billion between April 2000 and December 2020.

Indian government has estimated that India would emerge with a market size of 1.2 million cruise visitors by 2030-31. Dream Hotel Group plans to invest around US\$300 million in the next 3-5 years for the development of the cruise sector in India.

The Government is also making serious efforts to boost investment in the tourism sector. In the hotel and tourism sector, 100% FDI (Foreign Direct Investment) is allowed through the automatic route. A five-year tax holiday has been offered for 2-, 3- and 4-star category hotels located around UNESCO World

Heritage sites (except Delhi and Mumbai).

The launch of several branding and marketing initiatives by the Government of India such as 'Incredible India!' and 'Athiti Devo Bhava' has provided a focused impetus to growth. The Indian Government has also released a fresh category of visa - the medical visa or M-visa, to encourage medical tourism in the country. **The Government is working to achieve 2% share in world's international tourist by 2025.**

Government is planning to boost the tourism in India by leveraging on the lighthouses in the country. 71 lighthouses have been identified in India which will be developed as tourist spots. The Government of

India also announced to develop 17 iconic tourist sites in India into world-class destinations as per Union Budget 2019-20.

**Staycation is seen as an emerging trend** were people stay at luxurious hotels to revive themselves of stress in a peaceful getaway. To cater to such needs, major hotel chains such as Marriott International, IHG Hotels & Resorts and Oberoi hotels are introducing staycation offers where guests can choose from a host of curated experiences, within the hotel.



India's travel and tourism industry has huge growth potential. The industry is also looking forward to the expansion of e-Visa scheme, which is expected to double the tourist inflow in India. India's travel and tourism industry has the potential to expand by 2.5% on the back of higher budgetary allocation and low-cost healthcare facility.

Amid the relaxation provided by the government after the COVID lockdown, the Indian Association of Tour Operators (IATO) has urged the government to finalize a roadmap for resumption of international flights and facilitate e-visas and tourist visas. The Indian Railway Catering and Tourism Corporation (IRCTC) runs a series of Bharat Dar-

shan tourist trains aimed at taking people to various pilgrimages across the country.

Subsequently in November end, India introduced a graded relaxation of its visa and travel restrictions for more categories of foreign nationals and Indian nationals.

**Post the pandemic crisis, the government plans to tap into regional tourism by opening doors for South Asian country tourists.**

All across the world, countries are looking at tourism as the **main driver to revive their economy**. The central government plays an important role in developing a strong visitor economy which is evident

from the fact that the Ministry of Tourism has also undertaken a slew of initiatives, such as the **Incredible India 2.0** campaign focusing on niche tourism products including wellness and adventure tourism, as well as **investment into the industry** through schemes, such as **PRASHAD** and **Swadesh Darshan**, which have proven to be successful in increasing the number of foreign and domestic visitors in India. **The National Tourism Taskforce (NTF)** has been formed by the Ministry of Tourism, Government of India. It will play a major role in the survival and revival of the Indian travel and tourism industry so that it can once again be the torch bearer for the Indian economy.





## Central Government Initiatives to boost Tourism Infrastructure in India

- Ministry of Tourism
- Ministry of Culture
- Ministry of Civil Aviation
- Ministry of Road Transport and Highways
- Ministry of Railways
- Ministry of Shipping
- Ministry of Housing and Urban Affairs
- Ministry of Environment, Forest & Climate Change
- Ministry of External Affairs



### Ministry of Tourism

Ministry of Tourism, Government of India has launched different infrastructure development schemes i.e. **PRASAD** and **Swadesh Darshan** and **Adopt a Heritage** scheme for developing synergy among all partners to effectively promote 'responsible tourism'.

#### Schemes

- I. **Integrated Development of Tourist Circuits around Specific Themes- Swadesh Darshan Scheme:** The Central Sector Scheme "Swadesh Darshan" with a total sanctioned cost of **INR 5531.76 Cr.** (Integrated Development of Theme-Based Tourist Circuits) envisages to develop theme based tourist circuits on the principles of high tourist value, competitiveness and sustainability in an integrated manner by synergizing efforts to focus on needs and concerns of all stakeholders to enrich tourist experience and enhance employment opportunities. This integrated approach includes providing engaging experiences for distinct categories of tourists i.e., national, regional, State and International. Various themes which are unique and specific to the area

can include religion, culture, heritage, etc. Therefore, Under the Central Sector scheme "Swadesh Darshan", 15 thematic circuits have been identified for development namely: Himalayan, Buddhist, North-East, Coastal, Krishna, Spiritual, Ramayana, Desert, Rural, Eco, Tribal, Wildlife, Heritage, Sufi & Tirthankara.

- II. **PRASAD** (National Mission on Pilgrimage Rejuvenation and Spiritual, Heritage Augmentation Drive) aims at developing infrastructural facilities at 25 religious places in the country. The scheme envisages for 37 projects spread across **24 states** with a total sanctioned cost of **1214 Cr.** have been sanctioned so far under the scheme.
- III. **Adopt a Heritage:** The Ministry of Tourism, Government of India has launched the "Adopt

**a Heritage: Apni Dharohar, Apni Pehchaan"** project which is a collaborative effort by the Ministry of Tourism, Ministry of Culture, Archaeological Survey of India and State/ UTs Government for developing tourism amenities at heritage/ natural/ tourist sites spread across India for making them tourist friendly, in a planned and phased manner. The project aims to encourage companies from public sector, private sector, corporate citizens, NGOs, individuals and other stakeholders to become 'Monument Mitras' and take up the responsibility of developing and upgrading the basic and advanced tourist amenities at these sites as per their interest and viability in terms of a sustainable investment model under CSR. They would also look after the Operation & Maintenance of the same.



## Ministry of Culture

India is known for its richest cultural diversity preserved and practiced through the centuries. Culture in India has proven tremendous ability to sustain Tourism industry in all the states specially Rajasthan, Kerela, Tamil Nadu and Uttarakhand. Culture plays very important role in development of promising tourism avenues for the states. The Ministry of Culture has been instrumental in reviving, restoring and promoting the rich culture of India through its various schemes.

### Schemes

With total budget of 2600 Crores in 2021-22, the Ministry of Culture hosts following schemes for development of infrastructure for cultural promotion.

#### i. Scheme of Financial Assistance for Creation of Cultural Infrastructure

The objective of the Scheme is to support voluntary cultural organizations and government-aided cultural organizations in their efforts to create appropriately equipped training, rehearsal and performance spaces for artistes. Grants will be given to projects for creating cultural spaces, which will includes:

- a) Conventional Cultural Spaces for Performing Arts
  - Performance venues, like Auditoria, Open-air Theatres, Concert Halls.
  - Rehearsal halls for Theatre/ Music/ Dance.
  - Training Centres/ Schools for Theatre/ Music/ Dance.
- b) Flexible Spaces, i.e., Studio Theatres, etc.: Non-proscenium rehearsal-cum-performance spaces, referred to as Studio Theatre or Experimental Theatre
- c) A project proposal to create an auditorium, a studio theatre or other cultural space(s) may include an appropriate combination of any of the following components:
  - New construction or purchase of a built-up space
  - Renovation/ upgradation/ modernization/ extension/ alteration of an existing building/ space/ facility.

- Re-modeling of the interiors of an existing built-up space/cultural centre.
- Provision of facilities like electricals, air conditioning, acoustics, light and sound systems and other items of equipment, such as musical instruments, costumes, audio/ video equipment, furniture and stage material that may be required for a studio theatre, auditorium, rehearsal hall, classroom etc.

#### ii. Museum Grant scheme

The scheme provides financial assistance for setting up of new Museums by State Governments and Societies, Autonomous bodies, Local Bodies and Trusts registered under the Societies Act. The grants are provided to strengthen and modernize the existing museums at the regional, state and District level, digitization of art objects in the museums across the country for making their images/catalogues available over the website and for capacity building of Museum professionals.

#### iii. Financial Assistance to Cultural Organizations with National Presence:

The financial grant is available for culture centres to meet their operations and maintenance requirements.

#### iv. Financial Assistance for Preservation and Development of Cultural Heritage of the Himalayas:

The scheme provides assistance for upgradation and preservation of manuscripts, literature, art & crafts at cultural centres in Himalayan states.



## Ministry of Civil Aviation

Air connectivity plays instrumental role in development of tourism economy. Economies which are majorly dependent on Tourism as source of economic growth have more impact of good air connectivity. The Directorate General of Civil Aviation is the regulatory body governing the safety aspects of civil aviation in India. It is responsible for regulation of air transport services to/from/within India and for enforcement of civil air regulations, air safety and airworthiness standards. It also interfaces with all the regulatory functions of International Civil Aviation Organization.

This Ministry deals with administrative control over allied and autonomous organizations such as Directorate General of Civil Aviation, Civil Aviation Security Bureau and Indira Gandhi National Flying Academy and related public sector

undertakings, National Aviation Company of India Limited, Airports Authority of India and Pawan Hans Helicopter Limited. The Railway Safety Commission, which is liable for the security of operation under the provisions of Rail Travel and Railway Act, 1989, also falls under the administrative control of this Ministry.

While air traffic increases with improvement in economy including tourism, the improving economy and tourism are also essential for growth of air traffic. Before onset of Covid19 pandemic, the Civil Aviation industry in India emerged as one of the fastest growing industries in the country. As per International Air Transport Association (IATA) forecasts, India is expected to overtake UK to become the third largest air passenger in International and Domestic market by 2024.

India is the third largest domestic civil aviation market in the world behind the USA and China. Although the situation of Air traffic has declined from 2019 to 2020 due to Covid-19 and then it has improved in mid of 2021. In the year 2019 close to 11 million foreign tourist visited India along with 7 million non-resident Indians. Majority of foreign tourist come by Air and Delhi shares 28.1 % (maximum) of total load of international tourist entry in India, followed by Mumbai at 13.6% and inland port of Haridaspur in West Bengal sees the third highest arrival point for foreign visitors from Bangladesh.

Effect of covid19 on the air traffic: Number of flights tracked by flight radar24 during 2019, 2020 & 2021

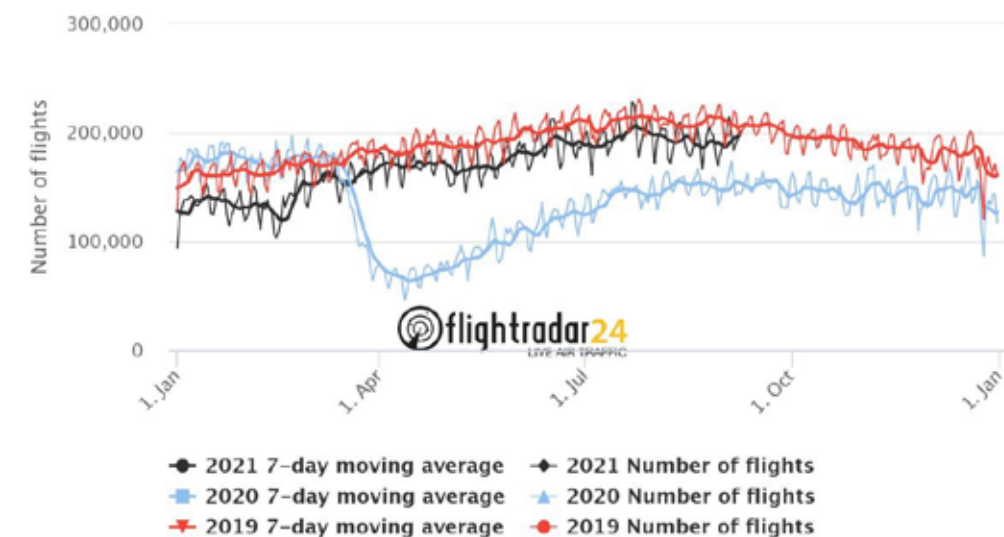


Figure-4: 7 days moving average of flights



Aerospace and Aviation Sector Skill Council (AASSC) seeks to make available skilled manpower for the aviation sector. Various Qualification Packs National Occupational Standards (QP-NOS) have been developed by AASSC for 72 Job roles for the five sub-sectors of Aerospace & Aviation viz., Airlines, Airports, MRO, Design & Development and Manufacturing & Assembly which are utilised for short-term skilling certification. Major initiatives taken by the AASSC are as follows

- Multi-skill Development Centre (MSDC) for Aviation Skilling has been set up at Chandigarh under the Corporate Social Responsibility (CSR) scheme funded by Airports Authority of India (AAI).
- Aviation Skill Development Center has been set up at Mumbai by LearnNet Skills as training implementation partner for CSR project of AAI.
- Participated in all the editions of the AeroIndia shows held from 2017 till date and in the Def Expo 2019 held in Lucknow for the promotion of aerospace and aviation skilling.
- Launched Centre of Excellence for Aerospace Manufacturing, Assembly and Design in the CSIR-NAL premises, Bengaluru in Jun 2019.
- Conducted interactive discussions on apprenticeship in collaboration with National Skill Development Corporation (NSDC) and Bangalore International Airport Limited (BIAL).
- Assessed and certified 3589 candidates/ employees of AI-SATS, Hindustan Aeronautics Ltd., (HAL) and Indian Navy for various AASSC Job Roles

### Achievements AASSC (till Sep 2021)

17122 candidates certified

72 Job roles identified

86 Training centres accredited



### Schemes and campaigns promoting infrastructure

#### i. National Infrastructure Pipeline

National Infrastructure Pipeline envisages investment of 111 lakh crores rupees over 2010-2025. The report highlights that the airport one of the fastest growing sector. During the fiscals 2013 to 2017, the share of airports sector investment in the overall infrastructure investment has been ~1% and has increased at a CAGR of ~16%. The report highlights the infrastructure deficit at airports. In 2019, the capacity utilisation across the six key airports remained high.

#### ii. Vision 2040

During Global Aviation Summit 2019, in Mumbai, Civil Aviation Ministry released Vision 2040 which estimates by 2040 India would require around 200 airports for handling 1.1 billion passengers and 40-50 billion dollars of investment. The scheduled airline fleet would have to be increased to 2400 by 2040. The Ministry projected that the number of airports in India would rise from 101 in January 2019 to around 190-200 by March 2040 and an estimated 150,000 acres of land and US\$ 40-50 billion of capital would be required for construction. The government proposed creating a \$2 billion fund to help support low-traffic airports. The report also targets establishing an aircraft manufacturing base in India by 2040.

#### iii. UDAN

Regional Connectivity Scheme (RCS), popularly known as Ude Desh ka Aam Naagarik (UDAN), to extend flight connection to Tier 3 and Tier 4 towns, has received significant interest from leading domestic carriers and start-up airlines, due to the various monetary incentives and the three-year exclusivity rights to operate on the allotted RCS routes. The Central government has planned to facilitate 1000 new air routes and establish 100 new airports by 2025 under UDAN scheme. Over 30 unserved and underserved airports added through UDAN, transforming connectivity in these communities, over 40 lakh seat capacity created for UDAN flights. Maximum airfare for 50% of seats on UDAN flights capped ₹2,500 for one hour of flying. INR 4,500 crore earmarked for revival and upgradation of UDAN airports, corpus of ₹300 crore raised to subsidise UDAN flights. UDAN scheme has sparked massive increase in helicopter services in hilly areas and islands through use of 31 heliports. The UDAN scheme will now be extended to provide connectivity for underserved tourist destinations and international routes.

#### iv. NABH Nirman

NABH (Next-gen airports for Bharat) Nirman programme formulated to prepare sector for a billion passenger trips. Regulations for greenfield and brownfield airports being revamped to attract necessary private sector investors. Over 1 lakh crore of investment lined up in airports in the next five years; AAI will invest over INR 20,000 crore.



## Ministry of Road Transport and Highways

Road transport is a critical infrastructure for economic development of the country. It influences the pace, structure and pattern of development. The development of tourism depends heavily on augmentation of essential tourism infrastructure based on carrying capacity and sustainability concepts by assessing infrastructure gaps and framing systematic strategic to eliminate the voids and pitfalls.

In India, roads are used to transport over 60 percent of the total goods and 85 percent of passenger traffic. Ministry of Road Transport and Highways (MoRTH) is an apex body for formulation and administration of the rules, regulations and laws related to road transport, transport research and also works to increase the mobility and efficiency of the road transport system in India. The National Highways Authority of

India (NHAI) is the flagship central sector entity responsible for development, maintenance and management of National Highways entrusted to it. The MoRTH reported an annual NH construction of over 13,327 km during FY 2021, translating to an average of ~35 km/day.



## Infrastructure

India has the 2nd largest road network in the world covering a total of 6.21 million kilometres. Thus roads and highways play an important role in attracting the domestic and international tourists. The relationship between road transport and tourism is primarily influenced by two elements viz. convenient access to tourist destinations and the quality of transport services which must meet tourists' expectations.

Roads (Total Length : 6.21 million Kms)			
Category	Managing Authority	Length (km)	Length share
National Highways	Ministry of Road Transport and Highways	151000	2.19%
State Highways	PWD of State/ Union Territory	186528	3.00%
District Roads	PWD of State/ Union Territory	632154	10.17%
Rural Roads	Panchayats and PMGSY	4535511	72.97%
Urban Roads	Municipal Corporations and Municipalities	544683	8.76%
Project Roads	Various govt dept of state/ union territories	354921	5.70%

Table-2 : Types of Roads in India

## Budget Allocation:

The Ministry of Road Transport and Highways has been allocated Rs 1.18 trillion for the financial yr. 2021-22.

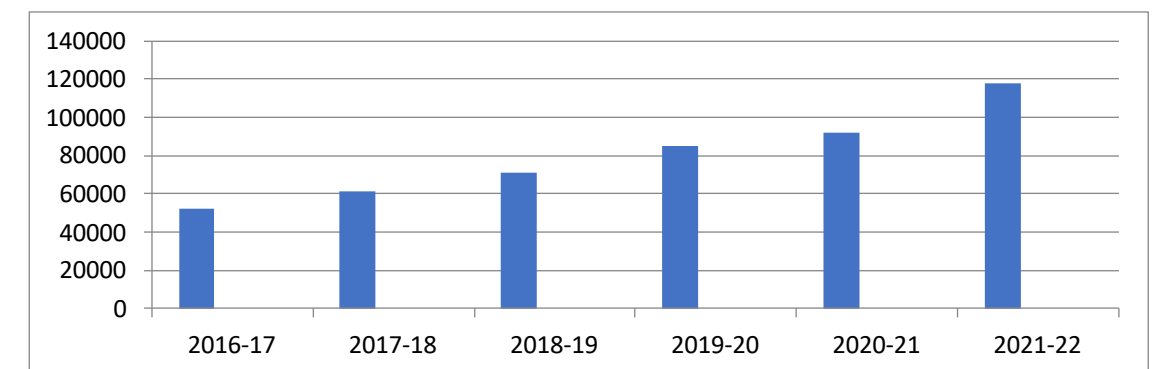


Figure-5: Union Budget Allocation for Ministry of Road Transport and Highways

## Policy Support

As evident from the budget surge over the years, transport infrastructure has been the priority of the government. Government of India is permitting 100% FDI in the road sector which has resulted in forming partnership with foreign companies.

### MoRTH Attempt at Promoting Tourism:

- I. **Pan-India Permit for Tourist Passenger Vehicle.** To facilitate the smooth and seamless move of tourist passenger vehicles pan India, a new scheme is being formulated by the MoRTH. In the scheme, any tourist vehicle operator can apply online for an all-India tourist authorization permit.
- II. Travel and tourism are complimentary, and this has been well understood and envisioned by both the ministries.
- III. **Provision of Wayside Amenities:** MoRTH has come up with the approach of providing the Wayside amenities along National Highways and Expressways which would provide much needed fillip, safety and convenience to the tourists.



## Schemes

Presently works relating to National Highways are being undertaken under different central government schemes:

### i. Bharatmala Pariyojana

An umbrella program for the highways sector that focuses on optimizing efficiency of freight and passenger movement across the country by bridging critical infrastructure gaps through effective interventions like development of Economic Corridors, Inter Corridors and Feeder Routes, National Corridor Efficiency Improvement, Border and International connectivity roads, Coastal and Port connectivity roads and Green-field expressways.

**Bharatmala Phase I** - is to be implemented over a five years period of i.e. 2017-18 to 2021-22. Phase-I of Bharatmala Pariyojana includes development of following roads:

Sno	Scheme	Length (km)	Cost (Rs. crore)
1.	Economic Corridors	9,000	120,000
2.	Inter-Corridors & feeder roads	6,000	80,000
3.	National Corridor Efficiency improvement	5,000	1,00,000
4.	Border & International connectivity roads	2,000	25,000
5.	Coastal & port connectivity roads	2,000	20,000
6.	Expressways	800	40,000
	<b>Sub Total</b>	<b>24,800</b>	<b>3,85,000</b>
7.	Ongoing Projects, including NHDP*	10,000	1,50,000
	<b>Total</b>	<b>34,800</b>	<b>5,35,000</b>

Table-3: Bharatmala Phase-1 Development Plan

### ii. Special Accelerated Road Development for North-Eastern Region, (SARDP)

The Ministry of Road Transport & Highways has initiated mega road development programme in North East with name "Special Accelerated Road Development Programme in North East (SARDP-NE)".

The scheme has been envisaged to be taken up under three parts as under:

**Phase 'A' of SARDP-NE** approved by the Government envisages improvement of about 4,099 km length of roads (3,014 km of NH and 1,085 km of State roads). Out of these, 3,213 km roads has been approved for execution and balance 886 km has been approved 'In-Principle'. 3,333 km of length has been awarded and 2,101 km of roads have been completed till March, 2019. The SARDP-NE Phase 'A' is expected to be completed by 2023-24.

**Phase 'B' of SARDP-NE**, covers 3,723 km (2,210 km NHs and 1,513 km of State roads) of road. Phase 'B' SARDP-NE shall be taken up after completion of Phase 'A'.



### iii. Char Dham Pariyojana (dedicated to development of Chardham Tourism Circuit)

The Ministry has taken up separate programme for connectivity Improvement for Char-Dham (Kedarnath, Badrinath, Yamunothri & Gangotri) in Uttarakhand. Out of total 53 civil works covering the entire length of 889 km under Chardham project, 40 civil works of total project cost amounting to Rs. 9474 crore (including cost of pre-construction works amounting to Rs. 491 cr.) in a length of 673 km have been sanctioned. 34 works in a length of 604 km amounting to Rs. 7923 cr. have been awarded out of which 30 works amounting to Rs. 7679 cr. in length of 589 km are ongoing and 78 km length has been completed till March 2019 and 2 works amounting to Rs. 141 cr. in a length of 1.1 km have completed. This will accelerate the tourism activity in the region.



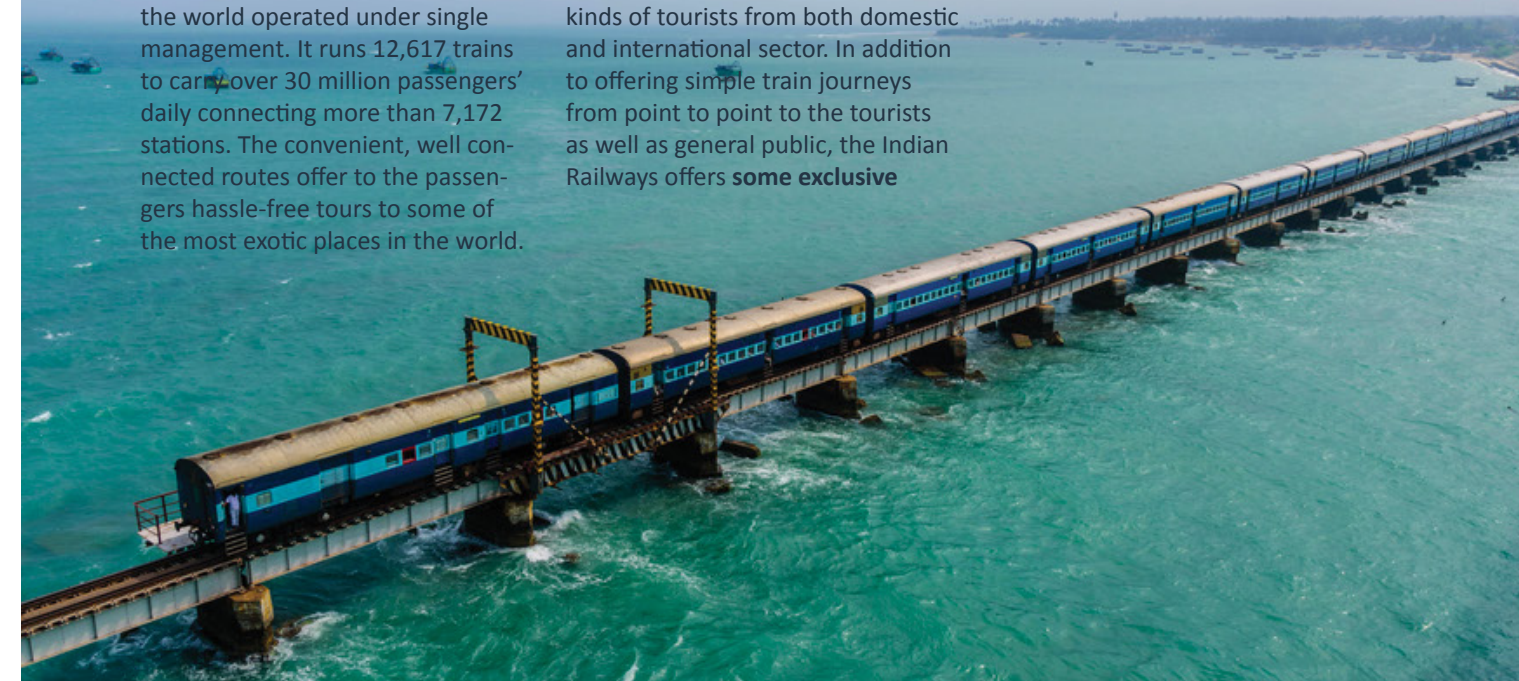
Figure-6: Major Road Development Program in North East region

## Ministry of Railways

Spanning over 115,000 km, Indian Railways is the largest rail network in Asia and the second largest in the world operated under single management. It runs 12,617 trains to carry over 30 million passengers daily connecting more than 7,172 stations. The convenient, well-connected routes offer to the passengers hassle-free tours to some of the most exotic places in the world.

The Railways contribute tremendously towards tourism as the **prime mode of transport** for all kinds of tourists from both domestic and international sector. In addition to offering simple train journeys from point to point to the tourists as well as general public, the Indian Railways offers **some exclusive**

**tourist trains like Mahaparinirvan Express, Bharat Darshan Trains, Punj Takht Train, Steam train.**





The Indian Railways **operate luxury tourist trains** in association with Indian Railway tourism Catering Corporation or State Tourism Corporations. Presently, the following trains are in operation Palace on Wheels, Deccan Odyssey, Golden Chariot, Royal Rajasthan on Wheels, Maharajas' Express

In addition, Indian Railway Catering and Tourism Corporation, a Public Sector Undertaking under the Ministry of Railways, provides a large number of specialized tourism products and also facilitate specific tourism requirements. Some **IRTCTC Tourism offers special packages** for music, dance and other cultural festivals as well like the Odisha-Konark

Dance and International Sand Art Festival Special. Other than this, the IRTC offers packages like Diwali Teerth Yatra, Ramayan Yatra, Bharat Darshan, **Dakshin Bharat Yatra, Shiv Shani Sai Darshan, Shirdi Special.**

Transport is a vital component of tourism industry. Though there are various modes of transport in India to view the beautiful tourism resources of the country, railways is one of the cheapest and comfortable mode of transport for the people always. The Indian Railways is taking effective steps to attract the tourists. **Thus it can be stated that the Indian Railways play a major role in promoting tourism in the country.**

The Ministry of Railways has been allocated **INR 1,10,055 crore for FY 21-22 rising by almost 57% over previous year in the Union Budget.** This budget allocation will be mostly spend on strengthening the national rail infrastructure, doubling tracks, improving traffic facilities, electrification of lines and better passenger safety.

The Ministry of Railways has undertaken a wide range of initiatives designed to encourage investments. Key initiatives that will be instrumental in spurring tourism growth are as follows:

### Growth Initiatives

- I. Railways is now undertaking a partnership approach for passenger train operations. To enhance overall service quality and operational efficiency, IR is now pro-actively engaging with stakeholders and initiating dialogue with private players. This aims at improving the passenger experience and bringing modern technologies and private investments.
- II. In the first phase, it is planned to introduce 151 modern passenger trains operated through PPP over 109 Origin Desti-

- III. In a visionary plan, to further enhance safety of train operations it is planned to install **indigenous Train Collision Avoidance System (TCAS)** over Railways. System is already functional over 250 route km and will be proliferated over the entire network in a phased manner. The work is in progress

- IV. **“MeriSaheli” initiative taken for focused action on security of women travelling in trains**
- V. IR is encouraging manufacturing and promotes production of goods and services in India, with Increase of local content through Partnerships, cooperation with local companies, establishing production units in India and Joint venture with Indian suppliers. Proactive Reciprocity principle in Make in India policy has been enabled.



### Technology Upgradation

1. 100% coaches fitted with Bio Toilets
2. Pilot phase for feeding solar power to traction power commissioned
3. Integrated Mechanized Cleaning now provided at 953 Stations
4. Better train information display coach guidance system is in place at 673 stations while train indication boards are now commissioned at 1208 stations.
5. 5885 Stations provided with Wi-Fi.
6. Artificial Intelligence based PNR confirmation predictor has been integrated with Indian Railway Catering and Tourism Corporation (IRCTC) website which predicts the probability of waitlisted ticket getting confirmed at the time of booking and eliminates last minute uncertainties faced by the rail passengers.

### High Speed Train Network

1. On November 26, 2020, National High-Speed Rail Corporation Limited (NHSRCL) signed an agreement with L&T to design and construct 47% alignment works for Mumbai-Ahmedabad bullet train project.
2. In November 2020, Indian Railways' Rail Coach Factory (RCF), in Kapurthala, rolled out a semi high-speed double-decker coach. Equipped with the modern amenities and design, the coach can run at a top speed of up to 160 km/h.

Railways continues to work steadfastly to become the engine for the nation's vikasyatra. Over the past 6 years, Railways has strived for modernisation of systems, processes and infrastructure. Railways is committed to become an **efficient, self-sustainable, cost effective, punctual and a modern carrier of passengers and freight services provider of highest standards in order to serve the growing needs of New India.**

Expenditure of Indian Railways from financial year 2001 to 2020 with an estimate for financial year 2021 (in billion Indian rupees)

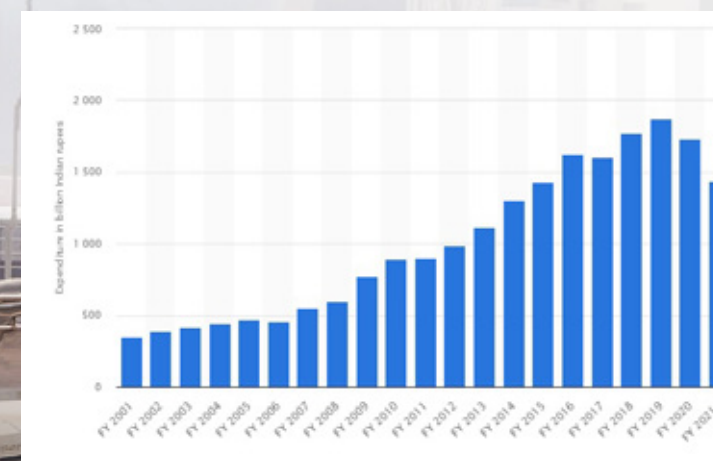


Figure-7: Expenditure of Indian Railways from financial year 2001 to 2020 with an estimate for financial year 2021(in billion Indian rupees)

Source: <https://www.statista.com/statistics/623476/railway-expenditure-india/>

## Ministry of Shipping

The cruise and coastal tourism is one of the most dynamic and fastest growing industries world-wide. India with its vast coastline, virgin forests, islands, rich history and culture have immense potential for attracting cruise tourists. Cruise Tourism, as a 'Niche' tourism product, has been recognized in order to promote India as a 365 days' destination and attract tourists with specific interest

The Cruise Shipping Policy of the Ministry of Shipping was approved by the Government of India with the objective to make India as an attractive cruise tourism destination with state-of-the-art infrastructural and other facilities. India has many destinations which are connected by beautiful rivers outlined by the Bay of Bengal, Arabian Sea and Indian Ocean. Thus, Ministry of Shipping plays a pivotal role to unlock

the immense potential of cruise tourism and thereby strongly position India's tourist destinations. The steps taken to promote Cruise Tourism include developing appropriate infrastructure at ports for handling cruise vessels and facilitating ease of movement of passengers.

### The Ministry of Shipping has undertaken following key initiatives to boost tourism promotion in the country:

#### I. Sagarmala Programme

Development of coastal communities through Marine sector related activities like fisheries, maritime tourism and corresponding skill development is an essential objective of the Sagarmala Programme. Development of cruise tourism and lighthouse tourism are other activities which are being actively considered under Sagarmala Programme.

Development of Coastal Circuits under Swadesh Darshan Scheme of Ministry of Tourism worth Rs INR 674 Cr spread across 8 States like Goa, Andhra Pradesh, Puducherry, Tamil Nadu, Odisha, Maharashtra, Andaman & Nicobar and Maharashtra.

Development of infrastructure for promoting Cruise tourism, Development of lighthouses, National Maritime Heritage Museum Complex at Lothal, Underwater viewing gallery and restaurant at Beyt Dwarka

#### II. Cruise Shipping

Cruise shipping in India is at a nascent stage and Ministry of Ports, Shipping and Waterways and Ministry of Tourism are actively promoting cruise tourism for its vast economic impact, potential for job creation and earning foreign exchange. A national roadmap for development of cruise tourism has been made and various steps have been taken to promote cruise tourism in India, these include extension of relaxation of cabotage for foreign cruise vessels calling Ports of India for a further period of 5 years beyond Feb, 2024 i.e., up to February, 2029, e-visa facilities for cruise passengers arriving in India, and concessional tariff rates for cruise ships.

#### III. Ghogha - Hazira RoPAX Ferry

Prime Minister Shri Narendra Modi inaugurated the Ro-Pax terminal at Hazira and flagged off the Ro-Pax ferry service between Hazira and Ghogha in Gujarat through video conferencing, on 8th November, 2020. A new maritime connectivity has been established between Bhavnagar and Surat of Gujarat. The service between Hazira and Ghogha will shorten the journey from 10-12 hours to 3-4 hours. This will save time and cost will also be reduced. and the quality of transport services which must meet tourists' expectations.



#### IV. First Seaplane of India started its operation from Statue of Unity, Kevadiya to Sabarmati River in Gujarat

India's first Seaplane Service operation inaugurated by Prime Minister Shri Narendra Modi on 31st October, 2020, between Kevadia and Sabarmati River front in Ahmedabad. The innovative floating jetties made of concrete is installed by the Inland Water Authority of India to support the seaplane operations. Ministry intends to gauge the interest of airline operators who is interested in the operation of the Seaplane services on the select routes. The key focus is to ensure faster and hassle-free travel of passengers, tourists and pilgrims through seaplanes to destinations which are currently accessible through long and tortuous road journeys.

#### V. Ramayan Cruise

Ramayan Cruise Tour on the Saryu river in Ayodhya will be launched soon. Shri Mansukh Mandaviya, Minister of Ports, Shipping and Waterways chaired a review meeting for the implementation of cruise service. It will be the first-ever luxury Cruise service on the Saryu river (Ghagra/National Waterways-40) in Ayodhya, Uttar Pradesh. It aims to give mesmerizing experience to dev-

otees with one-of-its-kind spiritual journeys while cruising through the famous ghats of the holy river Saryu.

#### VI. Lighthouses as Tourism Attraction

A high level meeting was held for developing around 194 existing lighthouses across India as Major tourist attractions. It will boost the tourism activities in lighthouses surrounding areas and give an opportunity to know about the enriched history of lighthouses.

#### VII. National Maritime Heritage Complex

A world class National Maritime Heritage Complex will be developed at Lothal, Gujarat Memorandum of Understanding (MoU) signed between the Ministry of Shipping of Government of Indian and Ministry of National Defence, Republic of Portugal.

India Maritime's short-term prospects remains bleak due to the pandemic affect, global developments, and low domestic demand. However, the long-term outlook looks promising backed by a series of government reforms and recovery of trade globally.





## Ministry of Housing and Urban Affairs

The Ministry of Housing and Urban Affairs (MoHUA) is the apex authority of Government of India at the national level to formulate policies, sponsor, and support programme, coordinate the activities of various Central Ministries, State Governments and other nodal authorities and monitor the programmes concerning all the issues of housing and urban affairs in the country. The percentage of urban population to the total population of the country stands at 31.6. There has been an increase 3.35 percentage points in the proportion of urban population in the country during 2001-2011. As per the estimation of the World Urban Prospects (WUP), 2018 the urban population in India at 34% of total population which is likely to be 40% by 2030 and 50% by 2050. Urbanisation is considered as one of the engines of economic growth in India. Thus, continuous growth of urban population has further added challenges like Housing, poverty, unemployment, development of health, sanitation, education, and infrastructure etc. In this context the role of the Government and the Ministry of Housing and Urban Affairs (MoHUA) is of utmost importance in the implementation of various programmes and schemes

to address these basic issues.

The Government of India is committed to the vision of developing new India where towns and cities would function as a supporting element for economic growth. Promotion of ease of living, responsive governance, clean and sustainable environment, rapid economic growth, and livelihood opportunities for the citizens are pathways identified for a vibrant urban India. The Ministry is committed to building cities of the future following a comprehensive, inclusive, participatory, and data driven approach. It aims to scale up urban transformation with our learning in smart cities and all other missions in the nations journey towards US\$5 trillion economy and a New India.

In February 2021, the MoHUA launched the National Urban Digital Mission (NUDM) along with other digital initiatives to realize the Prime Minister's vision of Digital India and AtmaNirbhar Bharat, by making cities more self-reliant. These initiatives certainly aiming to promote inclusive development fulfilling the promise of the Government "Sabka Saath, Sabka Vikas, Sabka Vishwaas". The MoHUA has aligned

all the programmes and schemes to fulfill the commitment of the Government to achieve the Sustainable Development Goals (SDGs) by 2030.

### HRIDAY

The National Heritage City Development and Augmentation Yojana (HRIDAY) is a central sector scheme of the Government of India aligned with the tourism industry to boost the tourism infrastructure of the country and with the aim of bringing together urban planning, economic growth and heritage conservation in an inclusive manner & with the objective of preserving the heritage character of the city. The Scheme has supported development of core heritage linked civic infrastructure projects which includes revitalization of urban infrastructure for areas around heritage, religious, cultural and tourism assets of the cities. These initiatives include development of water supply, sanitation, drainage, waste management, approach roads, footpaths, streetlights, tourist conveniences, electricity wiring, landscaping, and such citizen services.

## Swachh Bharat Mission (SBM)

To accelerate the efforts to achieve a Swachh Bharat, Swachh Prayatan and bring focus on hygiene & sanitation, Ministry of Tourism in 2015 had setup a Project Monitoring Unit for Swachh Bharat Mission. The mission aims to achieve neat and clean tourist places which attract more Foreign and Domestic Tourists. The SBM Division includes the following functions:

- To serve as the secretariat for the Swachh Bharat Mission.
- Assistance in formulation of strategies related to Swachh Bharat Mission.
- Monitoring of projects taken up in partnership with various divisions of the MoT
- Inspection of Projects being implemented; Interaction with the other Ministries, States/UTs and the stakeholders through appropriate means including meetings, conferences, and workshops to take the initiative forward through State agencies.
- Attend parliamentary matters.
- To update Swachh Bharat Abhiyan / Swachhta Samiksha / Swachhta Action plan (SAP) /

e-Samiksha / CPGRAMS website / portal.

## Ministry of Environment, Forest & Climate Change

The Ministry of Environment & Forest and Climate Change (MoEF&CC) is the nodal agency in the Central Government for overseeing the implementation of India's environment and forest policies and programmes relating to conservation of the country's natural resources including lakes and rivers, its biodiversity, forests and wildlife, ensuring the welfare of animals and prevention and abatement of pollution. **While implementing these policies and programmes, the Ministry is guided by the principle of sustainable development the same way Sustainable Tourism aims to increase the positive impacts and reduce the negative impacts of tourism development.**

According to United Nations World Tourism Organization (UNWTO), tourism contributes to 5% of global carbon dioxide emissions and 4.6%

of global warming by radioactive forcing. The transport accounts for 75% of the total CO2 emissions by the sector, with aviation and road transport accounting for 40% and 32% respectively and the accommodation stands at 21% of the total tourism sector emissions. Sustainability has emerged as an important issue for some of the fast-growing tourism destinations around the world, especially in developing countries which already support large native populations. One parameter highlighting this fact is the number of international visitors compared to the local population, which provides an indication of the impact tourism may have on the destination.

The gap in the tourism sector brought by COVID-19 is seen as providing a chance to rethink and reset the direction of tourism and the values on which its success is judged. The COVID-19 crisis is a watershed moment to align the efforts of sustaining livelihoods dependent on tourism to the Sustainable Development Goals and ensuring a more resilient, inclusive, carbon neutral and resource efficient future.



## Initiation of Project Lion and Project Dolphin

Hon'ble Prime Minister of India, during his Independence Day speech to the nation on 15th August 2020, had announced initiation of "Project Lion" and "Project Dolphin" (both riverine and marine) for better conservation of the species and their habitats in lines of 'Project Tiger'.

### a. Project Lion

The **Project Lion** will entail habitat development, engage modern technologies in Lion management and address the issues of disease in Lion and its associated species through advanced world class research and veterinary care. The project will also address the human-wildlife conflict and will be inclusively involving local communities living in the vicinity of Lion landscape and provide them livelihood opportunities through activities such as eco-tourism, promotion of local art and handicrafts, home stays etc.

### b. Project Dolphin

The **Project Dolphin** will involve conservation of Dolphins (both riverine and marine) and the aquatic habitat through use of modern technology specially in enumeration and anti-poaching activities. The project will engage the fishermen and other river/ ocean dependent population and strive for improving the livelihood of the local communities through additional economic in-

centives. Under this project, awareness on conservation of dolphins and enhancement of livelihood opportunities will be made through promoting 'Dolphin Tourism'. The conservation of Dolphin will also envisage activities which will also help in the mitigation of pollution in rivers and in the oceans.

## Beach Environment & Aesthetic Management Services (BEAMS)

Implementation of Beach Environment & Aesthetic Management Services [BEAMS] in all 13 coastal States/UTs to conserve and protect the marine and coastal environment by installing infrastructures such as solid waste management system, grey water treatment plant, bio toilets, changing room and showers, security and surveillance systems and daily beach cleaning activity to achieve the Blue Flag Certification for the identified beaches.

## Initiatives by Regional Centres to promote Tourism

### a. Garhwal Regional Centre

The Garhwal Regional Centre has reinvented pilgrimage potential for tourism in Garhwal Himalaya, Uttarakhand and identified some of the sites which may have the tourism potential. Towards developing it as an ecotourism hub, various biological and social aspects

were taken into consideration. Solid waste along the route of Kedarnath was quantified. Annual fuel wood consumption in lodges in the different towns of the valley was estimated. Various livelihood options were also identified and demonstrated through training and capacity building programmes.

### b. Sikkim Regional Centre

This centre focuses on promotion of community based sustainable tourism in Khangchendzonga Landscape and linking livelihood with nature conservation, and (iii) establishment of nature learning centre at the Pangthang area. The centre is also implementing a transboundary project on Khangchendzonga Landscape where technical support to more than 163 beneficiaries for different livelihood improvement and conservation activities were provided.

### c. North-East Regional Centre (NERC)

The Centre focuses on enhancing ecocultural livelihoods in biodiversity rich areas of Arunachal Himalaya and explored alternative livelihood options for the local communities to reduce natural resource dependency and conserve biodiversity. The centre has taken up various initiatives like the development of eco-cultural tourism sector, agro-diversity products, strengthening access and benefit sharing through BMCs and PBRs at village level as well as other policy interventions.

## Ministry of External Affairs

The Ministry of Tourism has been working very closely with the Ministry of External Affairs for easing of the Visa Regime in the country. The Ministry supported the initiative regarding the implementation of Tourist Visa on Arrival enabled with Electronic Travel Authorization (ETA) (renamed as e - Visa) and committed all support to Ministry of Home Affairs, Ministry of External Affairs and Ministry of Civil Aviation for implementing this Programme. The Government of India launched the e - Visa in 2014 and subsequently e-Tourist Visa was initially introduced for 46 countries.

The Government of India has further liberalized the e-Tourist Visa Scheme pursuant to the Cabinet approval in 2016 and the e-Tourist Visa (eTV) scheme was renamed to eVisa scheme with five sub-categories:

- I. e-Tourist Visa
- II. e-Business Visa
- III. e-Medical Visa
- IV. e-Conference Visa
- V. e-Medical Attendant Visa

At present, the E-VISA scheme is available to the nationals of 171 countries. e-Visa is valid for entry through 28 designated Airports (i.e. Ahmedabad, Amritsar, Bagdogra, Bengaluru, Calicut, Chennai, Chandigarh, Cochin, Coimbatore, Delhi, Gaya, Goa, Guwahati, Hyderabad, Jaipur, Kolkata, Lucknow, Mangalore, Mumbai, Nagpur, Pune, Tiruchirapalli, Trivandrum, Varanasi, Vishakhapatnam, Madurai, Bhubaneswar and Port Blair) and 5 designated seaports (i.e. Mumbai, Cochin, Mormugao, Chennai and New Mangalore).

Recently, the government has made a series of amendments in the e-visa regime, liberalizing it further and making it more tourist-friendly. Key modifications have been made to the e-visa category as under:

- I. A new category of e-Tourist Visa for 5 years with multiple entry has been introduced in addition to the existing e-Tourist Visa for one year.
- II. The duration of stay for e-tourist visa is 90 days in case of nationals of all countries who are eligible for grant of evisa except nationals of USA, UK, Canada and Japan. In the case of e-Medical Visa and for e-Medical Attendant Visa, triple entry is permitted, and extension may be granted up to 6 months on case to case basis on merits of each case by the Foreigners Regional Registration Officer (FRRO)/ Foreigners Registration Officer (FRO) concerned.
- III. A new category of e-Tourist visa has been introduced which is valid for a duration of a month known as Double Entry.
- IV. In addition to the above, the visa fee has also been rationalized and has been fairly reduced.
- V. Government has now exempted the cruise tourists arriving with e-visa from the requirement of bio-metric enrolment. However, the foreigner can take exit from any of the authorized Immigration Check Posts (ICPs) in India.





## Key Initiatives taken by some leading States in promoting tourism



## Bihar



### Tourism Potential of the State with some major key attractions

The Ministry of Tourism, Bihar Government is responsible for promoting and incentivising the tourism opportunities in the state. The key activities of the department include developing the conditions and infrastructure to make the state conducive to travel and tourism. In addition, Bihar Tourism is also focussed on helping tourists find destinations, routes and experiences that are to their liking. Whether it is in the form of circuits that cover a specific set of spiritual, natural, or historical places, or different types of food and festivals, Bihar Tourism offers something for everyone. From helping tourists plan and book their travel and stay to ensuring they experience the beauty and culture of Bihar without missing anything from their itinerary, Bihar is home to some of the major tourist destinations. Patna, the capital of Bihar, is quite famous while other places as Bodhgaya, Nalanda, Vaishali, Rajgir, Pawanpuri, and Kesaria are amongst the top listed destinations in Bihar that witness tourists from across the country and abroad

as well.

### Policy Initiatives

The Bihar State Tourism Development Corporation (BSTDC), under the State Tourism Department has developed various tourist infrastructure like Tourist Bungalow, Cafeteria, Restaurant, Transportation facilities and Ropeway at various tourists spots to boost the tourism sector of the State.

BSTDC has taken up major initiatives to show the potential of tourist places of Bihar to the World. It aims to provide information related to important tourist places in the State. The State via their website provided details of available facilities such as Accommodation, Transport, Tour Packages, Tourist Information Centres for providing a seamless experience to the tourists.

### Infrastructure Assessment

The State Tourism Policy proposes to concentrate on addressing the current threats and harnessing the opportunities by adopting and implementing appropriate plans to handle the threats and overcome

our weaknesses with the objective of increasing the tourist inflow into the state significantly. The main objectives of their Tourism Policy are:

- a. Position tourism as state priority
- b. Focus on domestic tourism as a major driver of tourism growth.
- c. Promote Bihar for cultural, religious and wellness tourism.
- d. Improve the efficiency of the industry, for enhanced social and economic benefit, and consequential increased economic benefits, including increased employment generation.
- e. Ensure the participation of all the stake holders in society, including the travel trade and tourism industry.
- f. Create world class infrastructure
- g. Plan and implement a professionally managed integrated communications strategy to be called the Tourism Awareness and Promotion Campaign
- h. Provide quality services to all domestic & international consumers and stake holders.
- i. Improving connectivity of important tourist sites.



## Tourism Infrastructures Development

The Ministry of Tourism has sanctioned projects in Bihar for the development of rural circuits in the country. The Swadesh Darshan Scheme is planned for the integrated development of theme-based tourist circuits for the development of tourism infrastructure in the country. Recognising the potential of rural tourism in the country, the ministry has identified rural circuit as one of the thematic circuits for development under this scheme and is aimed at leveraging tourism as a force multiplier for revitalising the rural economy and for giving both domestic and international tourist glimpse of the rural aspects of the country.

## Development of Tourism Circuits

India is an important Buddhist pilgrimage destination where the Lord Buddha grew up and attained enlightenment. To attract more tourist, The Ministry of Tourism has identified Buddhist Circuit wherein three of the places are in the State of Bihar, namely, Bodh Gaya, Rajgir and Vaishali. Introduction of Eco Tourism also known as ecological tourism is travelling to pristine and protected areas. The Eco circuit covering the Valmiki Tiger Reserve, Barabar Caves, Bhimbandh Sanctuary, Telhar Kund, and the Ghora Katora benefits not only the local communities but also allow people to enjoy and learn more about the natural characteristics. The State of Bihar also has some of the most fascinating circuits across a variety of genres namely the Ramayan Circuit, Jain Circuit, Sufi Circuit and Sikh Circuit.

## Product Development

The Bihar Tourism Department aims at developing a strategical framework for the development of the State Tourism:

### a. Establishment of Tourist Security Force

The State Government shall recruit security personnel to provide security services to the tourists to instill in them a sense of security while visiting to any tourist spot and also to offer a helping hand to co-operate with them. For this purpose, competent and skilled force shall be identified or through outsourcing qualified and smart security personnel from private sector will be posted at different important identified tourist spots.

### b. Preparing and Implementing Master Plans for Integrated Development and Marketing of Identified Circuits

- The tourism projects implemented under Central assistance and the State plans have not been able to create an impact in terms of creation of international standard tourism infrastructure. A Master Plan with a time frame of 10 years giving year-wise phasing of investment both by the government and the private sector would be developed and implemented. Such a plan would clearly state the short term and long-term plans, targets and ground realities.
- Efforts will be made to dovetail external assistance, central assistance, and state plan resources with private investments to attain the set goals as

under the Master Plan.

### c. Upgrading and Augmenting of Accommodation, Catering and Recreational Facilities

- The hotel accommodation in Bihar is grossly inadequate and there is need to not only increase the number of average beds per thousand by building budget hotels, but also build star category hotels at all the important tourist destinations to provide quality services to the high end international and national tourists. Land Banks will be developed to offer land identified for construction of star hotels to private sector at market price/lease/joint venture within the identified circuits.

- Way side facility is an important part of tourism. In this vein, comfortable rest houses fitted with basic amenities on high-ways flanks, alongside the fuel filling stations (petrol pumps), would be created with public and private investments.

- The state government would also encourage establishment of Heritage Hotels in Bihar by identifying heritage buildings and mansions to convert them to Heritage Hotels in order to provide quality accommodation to tourists.

- The state government will explore and develop the possibilities for launching Paying Guest Scheme by identifying and registering the houses, house owners and families interested in this stream of tourism development.

- Light and Sound shows, Laser shows, Multi-media museums etc. would be developed in partnership with private sector for entertaining tourists at important tourist sites including the historical sites.
- The state government would encourage private sector to set up world class Amusement Parks, Golf Courses, Casinos, Floating restaurants etc. to attract more tourists.

### d. Augmenting Connectivity and Transport Facilities by

- Connecting tourist spots with world class roads.
- Introducing more specialized vehicles
- Introducing special Tourist Trains with a preset itinerary.
- Introducing Air Taxi service and helicopter services in identified circuits with Hub-Airport concept

### e. Improving and Expanding Tourism Products to meet new market requirements

- Improve infrastructure in identified circuits like Buddhist, Jain and Sikh circuits by converging all resources and expertise for development of these circuits as international standard destinations.
- Develop and promote new circuits like Ramayan, Sufi and Gandhi circuits.
- Bihar has a unique cultural heritage. It has a vast array of

protected monuments and one world heritage site. There are several other sites like the ruins of Nalanda, the oldest University in the world, that have the potential of being a world heritage site. Scope of cultural tourism shall be expanded by conservation, preservation and integrated development of the area around historical monuments.

- Promote and develop Rural Tourism around art and crafts of Bihar to spread the socio-economic benefits of tourism to rural areas. Select villages engaged in Madhubani painting, Patharkatti, Handloom and Tussar weaving in districts of Madhubani, Gaya, Nalanda and Bhagalpur shall be taken up for development of tourism facilities to promote rural tourism. With a view to promote handloom and handicrafts of Bihar, Shilp Grams (Craft villages) and handicrafts market shall be established near the tourist place.

- Promote Wellness Tourism based on yoga and aqua therapy using sulphur water from hot water springs in Rajgir and Munger. Bihar is home to an internationally known Yoga University and has several sulphur water springs having therapeutic quality. This can be Bihar's most unique tourism product offering holistic healing and rejuvenation of the individual from every dimension- physical, mental and spiritual. Knowledge of „yoga“ is something which they can take back with them and practice in their daily lives to distress and keep phys-

ically fit.

- Promote Eco-Tourism by integrating Wildlife Sanctuaries and Valmiki National Park into tourism product. The state would endeavour to develop tourist facilities near its Wildlife Sanctuaries and National Park and develop special packages to attract tourists to these sites. - Promote Ganga as a unique tourism product by introducing cruise along the river connecting historical sites near its banks. Riverfront development will be undertaken at identified places like Patna, Bhagalpur to promote tourism. Aqua Tourism shall also be promoted by developing water sports like river rafting, para sailing etc.

### f. Establishing and Strengthening Institutions for the Development of Human Resources

- Set up Hotel Management Institutes, Food Craft Institutes and Travel and Trade Institutes to create a pool of trained manpower in the hospitality and travel and trade sector.
- Training of Guides, especially foreign language speaking guides shall be undertaken to fulfill the need for well-informed guides speaking different languages at all tourist sites.
- Short term training would be organized for all the stakeholders in tourism like Immigration officers, Customs officers, Police officers, Taxi drivers etc. under the Capacity Building Programme of Government of India.



**g. Effective Marketing of Destinations both in the Domestic and International Market**

- Shift its current traditional marketing to one that is more aggressive and competitive
- Differentiate itself from competing destinations, including developing a unique market position, image and brand
- Establish an effective and on-going market representation presence with the travel trade in each source market
- Participate in important national and international tourism fairs to showcase tourist destinations in Bihar.
- Organize familiarization trips for leading national and international tour operators and media persons to give them first-hand information about tourist sites in Bihar.
- Strengthen Tourist Information Centres of the state by equipping them with modern information and communication technology (ICT) - computer, fax, internet, email etc. This would help in providing information to the tourists regarding tourist places, hotel bookings, transport facilities etc.
- Establish an Internet portal in various languages to service the information, product description, and product sales requirements of the target market segments in each source market.

**h. Focus on Domestic Tourism and Regional Tourism/Cooperation**

While developing tourism to attract foreign tourists the importance of promoting domestic and regional tourism has also to be kept in mind. Domestic tourism market is mostly local or regional and efforts shall be made to attract the domestic tourists, especially religious tourists, to Bihar by facilitating their arrivals, augmenting accommodation facilities and developing tour packages. Also, packages in coordination with Tourism Development Corporations of the neighbouring states shall be promoted to tap the unlimited potential of tourism within the region.

**i. Promotion of Arts, Crafts, Festivals and Cuisine of the State**

- Bihar has unique events, fairs and festivals like Sonepur fair, Chath festival, Saurat Sabha, Rajgir festival and Boudh festival that need to be promoted as tourism products. These unique events would be integrated with tourism and special tourist packages shall be developed and promoted to attract more international and domestic tourists during these events. A Calendar of Events shall be drawn up every year and promoted in all the source countries and states.
- The unique cuisine of the state like Khaja, Lai, Belgrami, Tilkut, Litti-chokha, Sattu and Makhana preparations will be promoted by holding Food Festivals and ensuring their sale at tourism fairs and through restaurants.



**Gujarat**

**Tourism Potential of the State with some major key attractions.**

Gujarat is the 5th largest state in India, occupying 6% area. Gujarat Tourism is driven by its rich heritage and vibrant culture. The state is blessed with multiple tourist attractions across the state. From barren white salt desert of Rann of Kuchh to Kathiyawad culture of Bhuj, from rich cultural heritage of Vadodara to diamond and cotton works of Surat, ruins of Indus Valley civilisation, Gujarat amasses tourist attractions which present lifetime of experience to the visitors. The vibrant festivals of Gujarat like Navratra-Garbha, Makar Sankranti Kite festival & flying lamp festivals combined with exquisite cuisines and warmth and simplicity of Gujarati people added with class infrastructure and safety makes it one of the most eligible tourist destination.

Some front runner of Gujarat Tourism developments are:

- World's tallest statue: Statue of Unity
- World's only home for Asiatic Lions: Gir Forest
- Asia's longest ropeway: Girnar ropeway
- India's First World Heritage City : Ahemdabad
- Home to Blue Flag certification beaches in India, Shivrajpur Beach
- First seaplane service Sabarmati Riverfront
- Sabarmati river is the first river which got rejuvenated and transformed by efforts of government

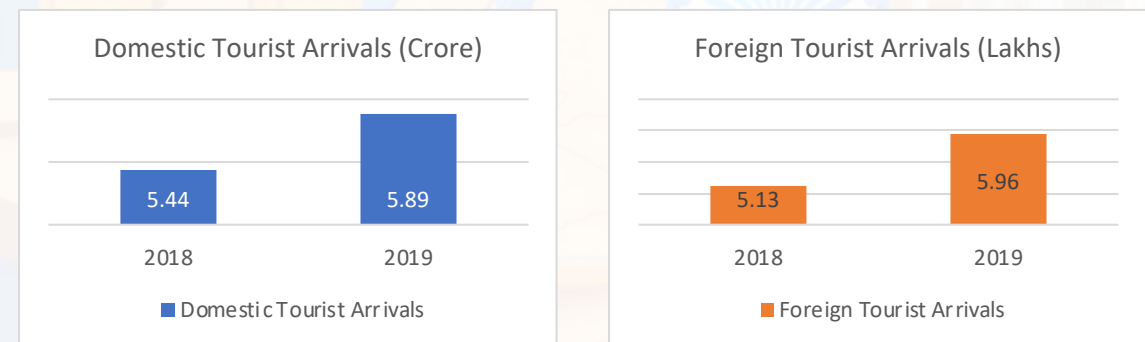
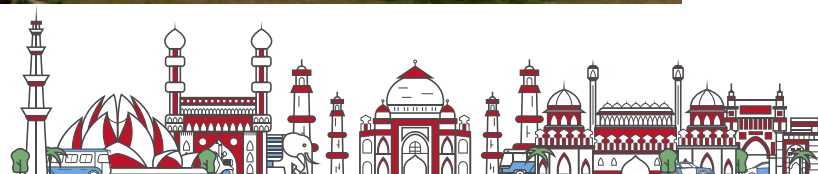
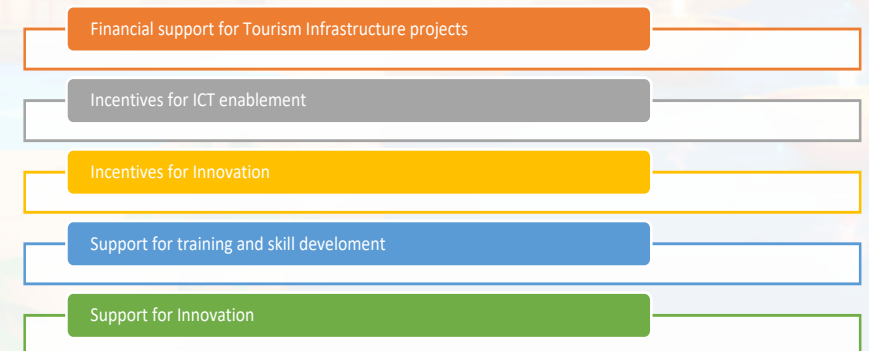


Figure-11: Tourism Arrival Statistics in Gujarat

**Tourism Policy & Policy Initiatives**

The state released Tourism Policy for the years 2021-25. The Tourism Policy 2021-25 envisage support in following areas:



## Incentives for Infrastructure development

S no.	Incentives for	Description
1	Hotels	Capital subsidy of 20 % on eligible capital investment, for setting up project at high priority tourism centre in Gujarat with minimum capital investment of 1 Crore Rupees.
2	Theme Parks and amusement Parks:	Capital subsidy of 15 % on eligible capital investment, for setting up Theme Parks and amusement Parks with capital investment ranging from 50 Crore Rupees to 500 Crore rupees 1 Crore Rupees.
3	Convention centre (2500 seating capacity)	Capital subsidy of 15% and land on lease by state government
4	NABH accredited Wellness resorts	Capital subsidy of 15 % on eligible capital investment for setting up projects

Table-4: Incentives for infrastructure development in Gujarat

## Infrastructure Assessment

### Connectivity

Airports: There are 19 airports in Gujarat State, wherein the Dholera green-field airport is to be constructed. Of these airports, nine (in Ahmedabad, Vadodara, Bhavnagar, Rajkot, Deesa, Surat, Kandla, Porbandar, and Keshod) are managed by the Airports Authority of India (AAI); however, the two airports in Deesa and Porbandar are not operational. In addition, the India Air Force (IAF) manages Bhuj, Nalia, Jamnagar airports, and the Gujarat State government manages Mehsana, Amreli, and Mandvi airports. A private company manages Mithapur (Tata), Mundra (Adani), Diu, and Daman airports

### Roads network in Gujarat

Sr. No.	Road Type	Length (in km)
1	National Highway	3229
2	State Highway	18556
3	Major District Road	20641
4	Other District Road	10493
5	Village Road	21119
<b>Total Length</b>		<b>74038</b>
<b>Length of Non Plan Roads</b>		<b>28463</b>

Table-5: Road Network in Gujarat



## Inland Water Transport

At least five rivers of Gujarat — including Mahi, Narmada, Sabarmati and Tapi that flow into the Gulf of Khambhat — are being explored for Inland Water Transport under the National Waterway Act 2016, that proposes to develop 111 waterways across the country for the purpose of shipping and navigation

## Accommodation

There are close to 87430 hotel rooms available in Gujarat and 86299 rooms have been verified.

## Development of Tourism Circuits

- Development of Tourism circuit by Public Private Partnerships: Gandhi circuit, Buddhist Circuit, Krishna Circuit etc.

- Conservation and infrastructure upgradation of Archaeological monuments at Lothal, Dholavira, Champaner, Rani-ki-Vav, etc.

## Encouraging Investments

Vibrant Gujarat Summit has been promoting all major economic sectors of Gujarat including tourism for investment. The state is one of the pioneers of reforms for Ease of doing business in India and is continuously reforming policies to attract investments in the state.

## Marketing & Branding

Gujarat tourism runs prominent marketing campaigns, the most special being the Khushboo Gujarat Ki, that enhanced the tourism activity in the state. The ads are placed on prominent flight routes, trade

fairs, coffee table books, magazines etc.

## Post Covid Revival Strategy

Gujarat Chamber of commerce and Industry has sought for relief package for Travel & tourism industry in Gujarat. The relief has been sought in the form of a waiver on electricity duty, property tax and subsidy for employee wages.

The state is focusing more on sustainable tourism post covid to make tourism industry practices sustainable during pandemic situations.



## Rajasthan

Rajasthan is located in the north-western part of the subcontinent. It is bounded on the west and northwest by Pakistan, on the north and north-east by the states of Punjab, Haryana, and Uttar Pradesh, on the east and southeast by the states of Uttar Pradesh and Madhya Pradesh, and on the southwest by the state of Gujarat. The Tropic of Cancer passes through its southern tip in the Banswara district. It is the largest state in India by area covering an area of 132,140 square miles (342,239 square kilometres). Jaipur is the capital city. The prominence of Rajasthan tourism can be understood as 2.6% of total tourist arrivals in India are happening in state of Rajasthan

Rajasthan is a vibrant state richly endowed with tourism resources. The state not only has the most beautiful desert in the world but the entire landscape is dotted with diverse tourist attractions, experiences and products. The built heritage, reflecting the State's royal past has a unique appeal and attraction, as seen through its grand forts, palaces, temples and other heritage properties. With all its natural advantages, Rajasthan has been a pioneer in evolving unique tourism products, be it the launch of the Palace on Wheels luxury train in 1982 or creation of the festival experience like Pushkar Fair or adaptive reuse of heritage properties as tourist destinations.

### Tourism statistics

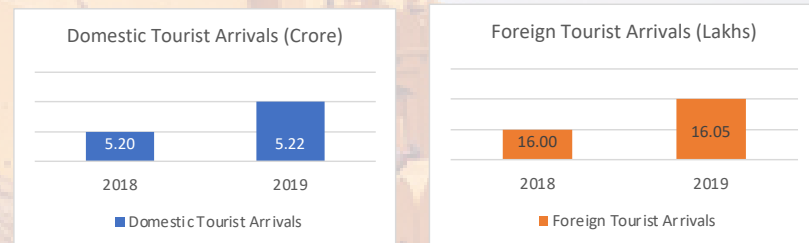
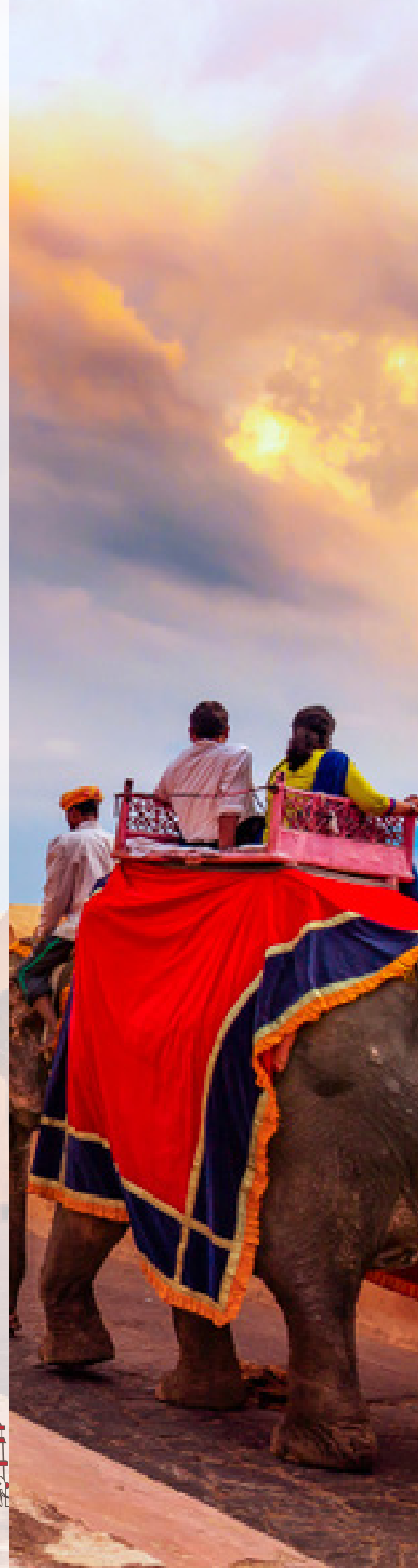


Figure-12: Tourism Arrival Statistics in Rajasthan

SNo	Category	Examples
1	Fairs	Pushkar fair, Gogaji Fair, camel Bikaner Fair, Shilp-gram crats mela, Desert Fair of Jaisalmer, Jaipur Book Festival.
2	Heritage	Chittorgarh Fort, Kumbhalgarh Fort, Ranthambhor Fort, Jaisalmer Fort , Jantar Mantar, Bhangarh Fort, Maharaja Express the heritage train,
3	Nature	Sariska Tiger Reserve, Neemrana,

Table-6: Some Major key attractions in Rajasthan



## Tourism Policy and Policy Initiatives

The state has released Rajasthan tourism policy 2020. The vision of the Tourism policy 2020 is to reposition Rajasthan as a preferred tourism destination for both domestic as well as international tourists by offering tourists a high quality experience, and through responsible and sustainable policies ensuring conservation of natural, historical and cultural heritage of the State while simultaneously accelerating socio-economic development by improving livelihood opportunities for the local population.

The state has also released Ecotourism policy 2021 operational for 10 years, aiming to develop sustainable tourism at potential eco-tourism spots in the state. The state has 3 National Parks, 3 Tiger reserves, 27 wildlife sanctuaries, 2 Ramsar site, 14 conservation reserves.

The objectives for Rajasthan Tourism Policy are:

- Promote Rajasthan as a leading tourism brand in national and international market.
- Strengthen and diversify existing tourism products
- Improve the connectivity of tourist destination through road, rail and air
- Facilitate tourism specific skills development to create gainful self-employment
- Market research and developing statistics grid development framework for better policy making and forecasting.
- Create suitable mechanism to promote effective inter-departmental coordination.
- Expand tourist accommodation infrastructure.

### Infrastructure Assessment Connectivity

**Airports:** There are 11 airports in Rajasthan

- Jaipur International Airport
- Maharana Pratap Airport, Udaipur
- Jodhpur Airport
- Jaisalmer Airport
- Nal Airport Station (Bikaner Airport)
- Kota Airport
- Kishangarh Airport
- Kolana Airport
- Lalgarh Airport
- Phalodi Air Force Station
- Suratgarh Air Force Station



**Road transport (as on 30.03.2019)**

Rajasthan has 3rd highest length of National Highways

SNo.	Classification	Length (Km)
1	National Highways	10599
2	State Highways	15517
3	Major District Roads	8757
4	Other District Roads	53431
5	Village Roads	175937
	<b>Total</b>	<b>264244</b>

Table-7: Road Network in Rajasthan





### Accommodation

In Rajasthan there are close to 3500 hotels/lodges providing 72025 rooms as of August 2021.

### Post Covid Revival Strategy

Following a steep decline in the number of active COVID-19 cases, attempts are being made in Rajasthan to attract domestic tourists to popular destinations in the State.

As restrictions continue for international travellers, the government and the private agencies are focussing on domestic tourists. The Federation of Hospitality and Tourism of Rajasthan (FHTR) has launched the first digital campaign to promote tourist destinations and connect tourism activities with the State’s rich heritage of arts and

crafts. The campaign has started with the focus on eco-tourism in forest areas with the participation of local communities.

## Karnataka

### Tourism Potential of the State with some major key attractions

The Government of Karnataka understands the importance of the tourism sector and has identified it as a priority sector of the State. Karnataka has seen an immense growth in domestic tourist visits, from 36.7 million in 2006 to 215.03 million in 2018. The State is responsible for nearly 12% of overall domestic tourist visits in India, placing it third among Indian states.

Karnataka also saw over 5.4 lakh foreign tourist arrivals in the year, 2018, ranking the State 11th for FTAs in India. Karnataka’s tourism sector contributed 14.8% of the State’s GSDP in 2019 and catered for over 30 lakhs jobs through direct and indirect employment.

**The State offers a multitude of tourism opportunities, living up to the promise of its brand “One State, Many Worlds”.** The state’s pleasant climate, cosmopolitan culture and highly responsive administration makes Karnataka an excellent destination setting up business and flourishing. The State’s tourism destinations offer a variety of themes including heritage, culture, ecotourism, spiritual, adventure, coastal, wellness, rural, and urban.



The Government of Karnataka is proud to host 3 UNESCO World Heritage Sites – Hampi, Pattadakal and the Western Ghats of Karnataka. In addition to that, four other sites, namely, Aihole-Badami Pattadakal, Kalaburagi-Bidar-Vijayapura (Deccan Sultanate), Srirangapatna, and Belur-Halebidu are on the tentative list of World Heritage Sites. The State is home to over 600 ASI-protected monuments and over 840 State-protected monuments as well as several devotional sites of spiritual and cultural importance. Karnataka also has an abundance of flora and fauna with 5 National Parks –and more than 30 Wildlife Sanctuaries and Tiger Reserves. Karnataka is home to more than 550 species of birds and over 100 species of mammals. Karnataka’s 320 km long natural coastline covering Uttara Kannada, Udupi and Dakshina Kannada districts has some of the best beaches in the India and the State has immense potential for development of coastal tourism. The natural beauty of the state extends to about 17 scenic hill stations and 40 beautiful waterfalls, making it one of the best Eco Tourism destinations in the country.

### Policy Initiatives

To ensure beneficial outcomes for all stakeholders of Karnataka Tourism, the Government of Karnataka shall endeavour to ensure the following –

- Promote Karnataka as an attractive tourism destination and place it prominently on the

domestic and global tourism map

- Develop tourism as a significant driver of inclusive socio-economic development for Karnataka
- Create a tourist-centric ecosystem that promises a safe and memorable visit for all visitors to Karnataka
- Augment the development of robust tourism infrastructure across Karnataka
- Tap the tourism potential of Karnataka to offer world-class experience to visitors through a diverse array of high quality products and services
- Support digital initiatives to improve destinations, tourist services, process efficiencies and the overall visitor experience
- Ensure coordinated and active involvement of all stakeholders for the improvement of tourism in Karnataka
- Encourage entrepreneurship and provide skill development for gainful employment in the tourism sector

### Infrastructure Assessment

Facilitating development and maintenance of essential tourism infrastructure at all destinations in a phased manner and ensuring a quality experience for all tourists is the key objective of the state. The Department of Tourism has undertaken the development of world-class tourism infrastructure at identified key destinations in Karnataka with special emphasis given to the

experiential aspects of tourism.

#### a. Connectivity and Hospitality Infrastructure

Karnataka has some of the best infrastructure facilities in India when it comes to travel and tourism. It is home to 2 international Airports and 8 airports with domestic connectivity as well as 3973 Kms of National Highways and 9829 kms of State Highways. The state is extensively working on the development and maintenance of tourism infrastructure facilities such as clean toilets, waste management systems, rest areas, parking facility, road signages, information kiosks, last mile connectivity and other public services and amenities that are crucial for ensuring a seamless experience for tourists.

#### b. Karnataka Tourism Policy 2020-25

The State Tourism Policy envisages to position Karnataka as a global tourism brand for visitors as well as for investors. This Policy not only encourages the development of relevant infrastructure through partnerships between private sector, government and the community but also aims at strategic interventions identified with a view to support local entrepreneurship and assist in creating livelihood opportunities for all sections of the society. Further, Karnataka Tourism shall seek to collaborate with other Government departments and agencies for development of potential tourism opportunities and for effective interdepartmental coordination.





## Tourism Infrastructural Development

In Rajasthan there are close to 3500 hotels/lodges proKarnataka offers a diverse range of tourism offerings with the aim to create a memorable experience for their tourists. The Department, during the Policy period intends to focus development of the following types of tourism offerings, which may also be referred to as the Tourism Themes. The State Tourism Infrastructure Development focuses on the following key areas:

- Destination Development
- Tourism Circuit Development
- Tourism Development Fund
- Hospitality Infrastructure
- Utilization of Tourism Land Bank
- Leveraging Existing Infrastructure for Remote Areas
- Adoption and Management of Destinations and Tourism Assets
- Wayside Amenities
- Complementary Infrastructure Assistance

## Development of Tourism Circuits

The state in its Tourism Policy 2020-2025 has envisaged the creation of

spiritual tourism circuits considering the various religious and spiritual institutions of Karnataka. Karnataka Tourism shall seek to increase the availability and quality of accommodation facilities and tourism amenities at all their spiritual tourism destinations. Caravan Tourism has also been seen as a potential product offering to be added as a new dimension to tourism in the State by providing flexibility with respect to itineraries and accommodations. Support has been extended for the development of caravan parks in important tourism circuits of the State in alignment with the guidelines issued by Ministry of Tourism.

## Community Engagement & Skill Development

To support the expected growth towards sustainable development of the tourism sector, Karnataka needs to develop the right human capital base. The Karnataka Tourism Policy 2020-25 envisions the creation of an ecosystem that is capable of providing skilled workforce to meet the needs of the tourism industry of the state. A Skill Development Committee shall be constituted under the Karnataka Tourism Task Force with representatives from the industry,

academia, and reputed skill development agencies to provide guidance and monitor the progress.

The Department of Tourism in collaboration with National level institutes like Institute of Hotel Management (IHM), Indian Institute of Travel and Tourism Management (IITTM), National Institute of Water Sports, Goa (NIWS), Kerala Institute of Tourism and Travel Studies (KITTS), Indian Institutes of Management (IIMs), and Indian Institute of Forestry Management (IIFM) amongst others has been extensively working towards providing courses for skill upgradation, re-skilling and short-term training for travel, tourism, and hospitality industries. Special emphasis has been given for skilling of tour guides registered with Department of Tourism. The Department shall also collaborate with industry players and academic institutions to leverage resources for the delivery of these programs with special emphasis rendered to programs for key tourism themes of Karnataka such as Agri Tourism, Cultural Tourism, Eco Tourism, Heritage Tourism and Coastal Tourism.

## Employment Generation & Livelihood Creation

The Department of Tourism and its undertakings have collaborated with Skill Development, Entrepreneurship and Livelihood Department (SDEL) to undertake skill development initiatives in the sector of tourism and hospitality by engaging with vocational training institutes for rolling out sector-specific skill development programs. Appropriate mechanisms have been developed for the skilling of local community to enable their participation in the tourism sector. In addition to skilling for tourism-specific soft and hard skills, such programs also enable households and individuals to produce and supply products that are demanded by the tourism industry.

## Product Development

### As per the Tourism Policy

2020-25, a wide range of incentives, subsidies and concessions have been sanctioned for the purpose of product development for Tourism Projects and Tourism Service Providers.

#### a. Incentives

- Registration of Tourism Projects and Tourism Service Providers
- Facilitation Support
- Marketing Support for Tourism
- Special Recognition for Sustainability Measures
- Assistance for Sustainability Initiatives
- Collaboration with Tourism Aggregators and Online Travel Agents
- Facilitate Inter-State Travel for Tourist Vehicles
- Marketing Development Assistance

- Tourism Excellence Awards
- Support for Homestays

#### b. Subsidies

- Capital Investment Subsidy for Adventure Tourism Project, Caravan Park Project, Hotel Project (Budget and Premium), Houseboat Project, Wayside Amenities and Wellness Centre
- Interest Subsidy for Agri Tourism Project, Cultural Tourism Project, Heritage Tourism Project, Safety and Hygiene Tourism Project.

#### c. Concessions

- Exemptions on Stamp Duty
- Concessional Registration Charges
- Reimbursement of Land Conversion Fee
- Exemption on Motor Vehicle Tax
- Complementary Infrastructure Assistance

## Encouraging Investments

The Government of Karnataka is fully committed to facilitate a favourable environment for the establishment and operation of Tourism Projects in the Karnataka. The Department of Tourism gives the highest priority to improving ease of doing business in the State. Karnataka envisages that most of the new projects in the tourism sector shall be driven by private sector investment with a relatively smaller proportion of the projects through public-private partnerships (PPP) or direct government investment. For encouraging investments in the State, a Global Tourism Investors Meet shall be organized by the Department to showcase the invest-

ment potential of Karnataka tourism amongst investors for encouraging increased participation from the private sector. A nodal agency under the Department of Tourism namely the Tourism Investment Facilitation Cell has been set up for enabling investment, its facilitation and monitoring.

## Marketing & Branding

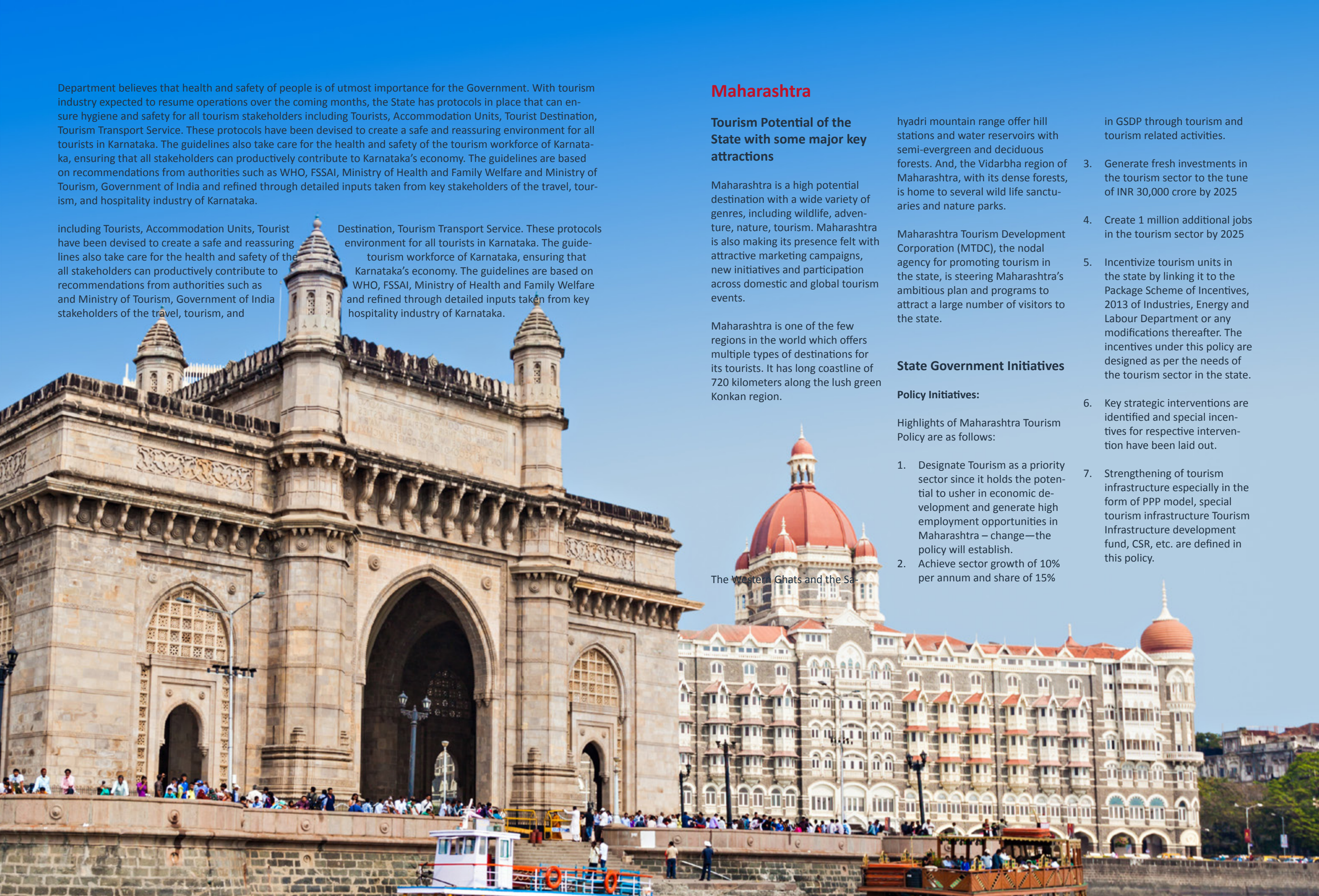
The State has adopted a 360° marketing strategy to promote Karnataka in domestic and key international markets and leverage Karnataka's brand of "One State, Many Worlds" to attract higher tourist footfalls to position Karnataka as a most preferred destination through theme campaigns, social media, roadshows, domestic and international travel fairs and trade fairs, investor meets, festivals, events, and advertising. Various market specific strategies to optimally leverage the potential of existing markets and increase its visibility in new and emerging markets have been taken up by the State:

- Targeted Campaigns for Karnataka Tourism
- Annual Promotional Calendar
- Exploring touchpoints for Karnataka Tourism through a website/app
- Strategic Partnerships
- Karnataka International Travel Expo
- Regular familiarization trips (FAM trips)

## Post Covid Revival Strategy

The COVID-19 pandemic has presented unprecedented challenges for the tourism sector across the world. With this, the State Tourism





Department believes that health and safety of people is of utmost importance for the Government. With tourism industry expected to resume operations over the coming months, the State has protocols in place that can ensure hygiene and safety for all tourism stakeholders including Tourists, Accommodation Units, Tourist Destination, Tourism Transport Service. These protocols have been devised to create a safe and reassuring environment for all tourists in Karnataka. The guidelines also take care for the health and safety of the tourism workforce of Karnataka, ensuring that all stakeholders can productively contribute to Karnataka’s economy. The guidelines are based on recommendations from authorities such as WHO, FSSAI, Ministry of Health and Family Welfare and Ministry of Tourism, Government of India and refined through detailed inputs taken from key stakeholders of the travel, tourism, and hospitality industry of Karnataka.

including Tourists, Accommodation Units, Tourist Destination, Tourism Transport Service. These protocols have been devised to create a safe and reassuring environment for all tourists in Karnataka. The guidelines also take care for the health and safety of the tourism workforce of Karnataka, ensuring that all stakeholders can productively contribute to Karnataka’s economy. The guidelines are based on recommendations from authorities such as WHO, FSSAI, Ministry of Health and Family Welfare and Ministry of Tourism, Government of India and refined through detailed inputs taken from key stakeholders of the travel, tourism, and

Destination, Tourism Transport Service. These protocols environment for all tourists in Karnataka. The guidelines also take care for the health and safety of the tourism workforce of Karnataka, ensuring that Karnataka’s economy. The guidelines are based on WHO, FSSAI, Ministry of Health and Family Welfare and refined through detailed inputs taken from key stakeholders of the travel, tourism, and

## Maharashtra

### Tourism Potential of the State with some major key attractions

Maharashtra is a high potential destination with a wide variety of genres, including wildlife, adventure, nature, tourism. Maharashtra is also making its presence felt with attractive marketing campaigns, new initiatives and participation across domestic and global tourism events.

Maharashtra is one of the few regions in the world which offers multiple types of destinations for its tourists. It has long coastline of 720 kilometers along the lush green Konkan region.

hyadri mountain range offer hill stations and water reservoirs with semi-evergreen and deciduous forests. And, the Vidarbha region of Maharashtra, with its dense forests, is home to several wild life sanctuaries and nature parks.

Maharashtra Tourism Development Corporation (MTDC), the nodal agency for promoting tourism in the state, is steering Maharashtra’s ambitious plan and programs to attract a large number of visitors to the state.

### State Government Initiatives

#### Policy Initiatives:

Highlights of Maharashtra Tourism Policy are as follows:

1. Designate Tourism as a priority sector since it holds the potential to usher in economic development and generate high employment opportunities in Maharashtra – change—the policy will establish.
2. Achieve sector growth of 10% per annum and share of 15%

in GSDP through tourism and tourism related activities.

3. Generate fresh investments in the tourism sector to the tune of INR 30,000 crore by 2025
4. Create 1 million additional jobs in the tourism sector by 2025
5. Incentivize tourism units in the state by linking it to the Package Scheme of Incentives, 2013 of Industries, Energy and Labour Department or any modifications thereafter. The incentives under this policy are designed as per the needs of the tourism sector in the state.
6. Key strategic interventions are identified and special incentives for respective intervention have been laid out.
7. Strengthening of tourism infrastructure especially in the form of PPP model, special tourism infrastructure Tourism Infrastructure development fund, CSR, etc. are defined in this policy.

The Western Ghats and the Sa-

## Infrastructure Assessment

It is well-connected by roadways, railways, waterways and airways. The power supply in the State is one of the most stable and reliable in the country. The State has also an excellent telecommunication network. All these services helps to link the State effectively with the rest of the country and with the world-cities. As a result, the Government of Maharashtra has been undertaking several infrastructural projects, from time to time, in order to attract large investments into the State.

Maharashtra has the largest **road network** in the country with a total road length of over 235,595 km consisting of 4,367 km of National Highways; 33,406 km of State Highways and 48,824 km of major district roads. Five national highways connect the State with Delhi, Calcutta, Allahabad, Hyderabad, and Bangalore.

Most cities in Maharashtra are well connected through an efficient railway network. Maharashtra has 5527 km of railway routes of, which 78.6 percent is broad gauge, 7.8 percent is meter gauge and 13.6 percent is narrow gauge. The Western, Central and Harbour railway lines connect the Mumbai city to distant suburbs and destinations across India. The Central Railways, one of the zones of the Indian Railways, has its headquarters in Mumbai, at the Chhatrapati Shivaji Terminus. Maharashtra also has an intra-city network of railways. The suburban railways is responsible for carrying 6.1 million passengers every day. The State has a total of 24 airfields/airports. Of these, 17 are under the control of the State Government; four are managed and controlled by the International Airport Authority/

Airport Authority of India, and three by the Ministry of Defence. Maharashtra has air connectivity with 10 cities, the main airports being Mumbai, Pune, Nagpur and Nashik. Mumbai is India's busiest airport.

### Product Development Initiative:

- Develop at least 10 plots in next five years in the regions of Vidarbha, Ratnagiri, Sindhudurg and Aurangabad etc.
- Infrastructure development for the Elephanta island
- Integrated infrastructure development of Sindhudurg and Ratnagiri under the coastal tourism project announced by Ministry of Tourism, Government of India
- Development of sea fort circuit along with the existing fort circuits
- Ajanta and Ellora conservation project
- Sea world project on the Konkan coast
- Lonar project as mega tourism destination
- Development of the Lake Tourism circuit – Nagpur, Chandrapur and Wardha
- Development of wayside amenities along the major National and state highways in Maharashtra
- Development of the new Ashtavinayak mega circuit
- Development of wildlife tourism estates around Tadoba
- Development of Caravan Tourism. The state is a perfect destination for such kind of tourism, since MTDC possesses land parcels which are in proximity to key tourist destinations. MTDC in collaboration with private players in the form of PPP/ JV mode will undertake ventures to caravan tourism parks.

- The state offers a unique tourism proposition through its rural landscape (approx. 55% of the state area). This strategy aims to promote rural tourism as the primary tourism product to spread tourism and its socio-economic benefits to rural and the surrounding regions
- Development of MICE structures. The state is a leader in receiving foreign tourist footfall in India. It aims to become a major player in this segment wherein, it provides suitable infrastructure - an impressive combination of accommodation and other conference support facilities to hold successful meetings, incentives, conferences and exhibitions.
- Introducing Smart Ticketing System. This is one of the most ambitious projects the state government plans to undertake which will provide tourists, a seamless travel ticket to major tourist destinations, hotel stays, air and surface travel within Maharashtra



## Ease of Doing Business

Maharashtra is the most favoured destination for industries owing to its well-developed infrastructure, skilled workforce, strategic location with good transportation network, progressive sectorial policies, one of the best incentive policies and much more. Maharashtra ranks 13th in India for Ease of Doing Business.

The Ease of Doing Business (EoDB) initiative by Government of Maharashtra is intended to foster further conducive business environment for the new as well as existing businesses/ industries/ commercial establishments etc. in the state of Maharashtra and also to be recognized as one of the leading states in India in terms of smooth business facilitation and support paraphernalia.

Being the State with maximum investment, domestic as well as FDI,

Ease of Doing Business is an important initiative for Maharashtra. The State has been actively participating in 'World Bank Doing Business' and 'Ease of Doing Business' activities of DPIIT. To facilitate businesses 103 government services are integrated with single window portal – MAITRI (Maharashtra Industry, Trade and Investor Facilitation Cell). Taking this initiative further, Government of Maharashtra is now committed towards Reducing Regulatory Compliance Burden in the state. The entire exercise is divided in two phases viz, Phase 1 and Phase 2.

### Marketing

The government has planned to undertake the following steps to promote tourism in the state:

- Develop an integrated 360 degree marketing plan.

- Participation in international roadshows/ fairs/ G2B meetings etc.
- Develop a world class website for Maharashtra tourism.
- Develop brand equity of the state through theme based tourism.
- Special incentives to media which promote Maharashtra tourism.
- Develop short films/AVs on Maharashtra tourism.
- Improve online presence
- TV/internet ads
- Develop marketing collaterals for the Maharashtra tourism website.

## Chhattisgarh

Chhattisgarh was carved out of Madhya Pradesh in the year 2000. It covers an area of 1,35,192 sq km, which is 4.11% of the geographical area of the country. The State is bordered by the Madhya Pradesh in the northwest, Uttar Pradesh in the north, Jharkhand in the northeast, Maharashtra in the southwest, Telangana in the south and Odisha in the southeast. The state is home to Three National Parks and 11 Wildlife Sanctuaries constitute the Protected Area network of the State covering 4.93% of its geographical area. The state is home of 78 lakh Scheduled Tribe population & 44% of the state is forest area that offers potential of developing Ecotourism, Nature tourism, Wellness Tourism and Tribal tourism.

The Chhattisgarh Tourism Board is responsible for infrastructural and institutional development, investment in facilities & hotels, wayside amenities and above all aggressive marketing & promotion for the comprehensive development.

### Tourism key attractions

#### Jagdalpur

Jagdalpur is a beautiful and naturally bountiful city in the Bastar district of Chhattisgarh and is one of the most popular tourist destinations in the state after Raipur and Bhilai. It is well connected to the state capital and to other nearby cities and is relatively unknown among tourists outside

#### Barnawapara Wildlife Sanctuary

The Barnawapara Wildlife Sanctuary is home to the Bar and Nawapura forest villages. It was established in the year of 1976 and is spread over a vast area of 245 sq. Km. The rich and lush vegetation caters to a broad spectrum of wildlife

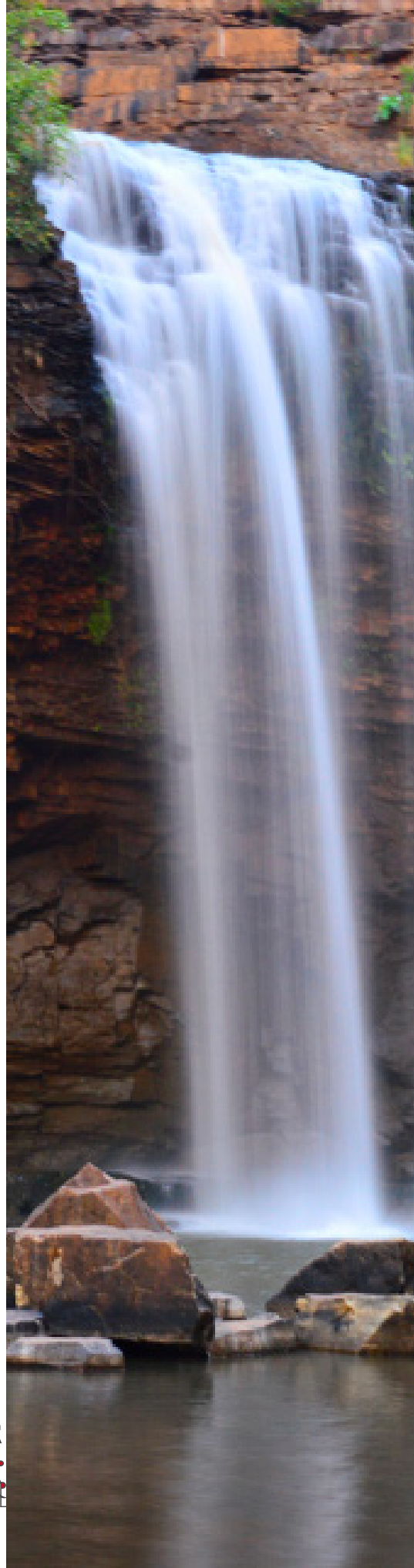
#### Chitrakote Falls

The broadest waterfall in India, Chitrakote is popularly known as the Niagara of India, because of its width. Situated in the west side of Jagdalpur in the Bastar District of Chhattisgarh, this waterfall originates from the Indravati river. Chitrakote Falls is at the height of about 30

#### Mainpat

Mainpat is an underrated hill station with green pastures, deep valleys, breathtaking waterfalls, dense forests and untouched rivulets. The hill station hasn't been completely commercialised yet and receives a relatively smaller influx of tourists compared to its counterparts.

Figure-16: Major Tourist Attraction in Chattisgarh



### Tourism potential

Ecotourism	Wellness Tourism	Ethnic Tourism	Adventure Tourism	Water Tourism	Heritage Tourism	Religious Tourism	MICE Tourism
------------	------------------	----------------	-------------------	---------------	------------------	-------------------	--------------

Type	Potential
Ecotourism	44% forest cover, Three National Parks and 11 Wildlife Sanctuaries
Wellness Tourism	Home to more than 1525 medicinal plants & 312 commercial medicinal plants forms 17% of total medicinal plant export of India
Tribal Tourism	Home to 78 lakh tribal population
Adventure tourism	Forest based Adventure sports and adventure tourism
Water tourism	Home to Mahanadi and 3-4 other rivers
Heritage tourism	Home to ASI conserved 47 heritage spots
Religious Tourism	ASI maintained 6 forts and 29 temples
MICE tourism	Smart City Raipur and Bhilai are prominent business tourism points for Chhattisgarh

Table-9: Tourism Potential in Kerala

### Tourism statistics

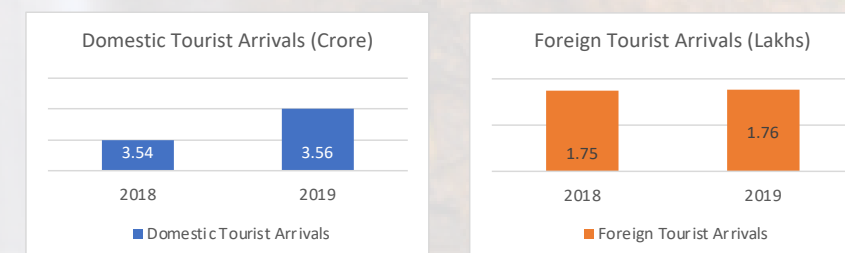


Figure-17: Tourism Arrival Statistics in Chhattisgarh

### Policy Initiatives

Chhattisgarh released Tourism Policy 2020 on the theme of Tribal tourism, Environment and wildlife tourism and Health and wellness tourism. The incentives and offerings have been planned for Hotel industry, travel and tours, land bank creation, training and capacity development.





## Infrastructure Assessment

### Connectivity

#### Airports

There are 4 airports in Chhattisgarh. Swami Vivekananda International Airport (IATA: RPR, ICAO: VARP) (formerly known as Mana Airport) is the primary airport serving the state of Chhattisgarh, India. The airport is centrally located at Mana, 15 km south of Raipur between the old city and the new seat of the state government Naya Raipur. The Airport is one of the 35 non-metro airports recently modernized by the Airports Authority of India (AAI). The other airports are at Bilaspur, Jagdalpur, Nawapara and Raigarh.

#### Road Network

Sr. No.	Road Type	Length (in km)
1	National Highway	3508
2	State Highway	6000+
3	Major District Road	10539+
4	Other District & Rural Road	20000+

Tabel-10: Road Network in Chattisgarh

#### Accommodation

In Chhattisgarh 4690 tourist rooms are being provided by 173 hotels and resorts. Chhattisgarh offers niche tourism hence it will require to build more eco-resorts closer to tribal tourism locations

## Jharkhand

### Tourism Potential of the State with some major key attractions

Jharkhand, famously known as “The Land of Forests”, is not just the ultimate destination for nature lovers and wildlife enthusiasts, but has increasingly emerged as a golden pasture for strategic investments in the tourism sector. The state’s potential can be gauged from the fact that during the “Momentum Jharkhand 2017” summit held in Ranchi on 16-17 February, the state attracted investment proposals worth Rs 2,273 crore for the tourism sector alone.

Blessed with unparalleled beauty including hills, mountains, forests, and waterfalls, this naturally rich state makes for a perfect holiday destination, especially for people looking for a rendezvous with nature. The abundant natural beauty of Jharkhand along with its several attractions such as holy shrines, museums, and wildlife sanctuaries, together contribute towards Jharkhand tourism.

Tourism in Jharkhand has grown considerably in recent years on account of more infrastructural facilities, improvement in existing tourist locations, development of new tourist destination and growth of hotels and restaurant facilities in the state.

### State Government Initiatives

#### Policy Initiatives:

Jharkhand has drafted a new tourism policy focusing more on private investment, employment, tourism promotion and education. In a bid to attract investment to develop tourism, the policy has proposed a 30% subsidy on total capital investment for developing any tourism facilities in Jharkhand. The policy also aims to generate employment for around one lakh people in the sector through short-term and long-term planning.

### Infrastructure Assessment

With the intent to promote tourism for all-round development of the state and providing greater choice

of destinations to tourists, the state government proposes to take up the development of the proposed projects on a Public Private Partnership mode. The government has accorded tourism the status of “Industry” in the state. It is also proposed to have Single Window Clearances for Tourism Development projects. It is also proposed to develop Private Tourism Zones with the extent of land not less than 20 acres, wherein the state government shall strive to provide required supporting infrastructural facilities.

World-class tourist infrastructure, such as amenities centers, information centers, transport facilities and exhibition halls for events are all on the anvil. The government has roped in private sector partners to improve travel infrastructure, such as roads, air connectivity and rail networks that will include a category of “super luxury trains.” Private sector involvement will also make road travel between tourist spots a convenient experience by providing petrol pumps, motor garages, snacks centers, toilet facilities, medical facilities, parking and more.



## Product Development Initiative

Jharkhand has enough potential for growth in cultural tourism, eco-tourism, medical tourism and mineral tourism and the government has been making all possible effort to establish the state on the tourism map of the country.

### Ropeway

The Jharkhand government plans to set up a ropeway at Pahari Mandir and develop Ram Rekha Dham (Simdega), Anjan Dham (Gumla) and Baba Baidyanath Dham (Deoghar) under the Swadesh Darshan and Prasad schemes. The government would also focus on showcasing rural and travel heritage and will introduce the Rajrappa Festival.

### Mice Tourism

Hatia dam is located in Ranchi district. It is proposed to develop a Convention Center and a Resort with amusement and recreational part park on the identified site of 8.0 acres.

Presently, the park has an exhibition space, eateries, space for cultural programme, entrance gate, toilets etc. The land is encumbrance free and within boundary wall. The site has an immense potential to be developed as a weekend destination for extended stay.

### Eco-Tourism

Chandil dam is one of these identified sites which have great potential for tourism. The dam is located in Saraikela Kharsawan district and

approximately 100 km away from Ranchi (via NH 33), the capital of the state Jharkhand.

The Jharkhand government proposes to develop Eco-Tourism Infrastructure at Chandil dam for creating unique tourism experience in the state, providing options and opportunities to the travelers for recreation. This dam would also be developed as a Camping and adventure tourism destination with suitable tourism infrastructure to provide varied and fulfilling experience to the tourists.

Other than this, the state has also proposed to develop water sports centers, Aero Sports Centers, New amusement park at notified tourist centers, Health resorts at places like hot springs, etc.

### Ease of Doing Business:

In India, Jharkhand ranks 5th in the DIPP ranking on Ease of Doing Business (EODB) among States in India.  
4.7.5 Marketing:

The government is focusing on marketing and promotion of the state as a tourism hub by using tools like:

- Strengthen the existing Tourist Information Centers (TIC's) and set up new Tourist Information Centers at a desired locations with adequate publicity aids.
- Organize familiarization tours and conventions of eminent and renowned travel writers, tour operators and travel agencies.
- Production of high quality informative audio-visuals and tourist literatures in English and other

foreign Indian languages.

- Use of electronic, print and cyber media for aggressive marketing of Jharkhand as a premier tourist destination.
- Organizing publicity campaigns through print media and the audiovisual media. The private sector would also be motivated to partner with the government to achieve these objectives.

### Community Engagement & Skill Development

- The government has taken initiative to actively involve the local communities in order to enhance their economic conditions through ecotourism activities. The type and scale of ecotourism activities shall be compatible with environmental and socio-cultural characteristics of the local communities leading to sustainable development of the area.

- Where feasible, local community members will be encouraged to provide lodging and boarding facilities to the tourists, subject to fulfilment of prescribed quality standards.

- The government is also taking steps towards capacity building of local communities in areas like hospitality, showcasing culture and natural heritage, interpretation and communication skills.

## Odisha

### Tourism Potential of the State with some major key attractions

The tourism sector is gearing towards a very exciting time in Odisha. The scenic beauty, temples, monuments, craftsmanship, wildlife sanctuaries, natural landscapes and pristine beaches make the state an ultimate tourism destination.

Apart from the integrated master planning of beach destinations like The Puri-Konark Beachfront masterplan, Balasore's Talsari-Udaypur Beachfront, Odisha has been scaling leaps and bounds in upgrading other beaches of the State following the **Blue Flag certification by FEE Denmark** of Puri's Golden Beach as one among eight certified beaches in India. Department of Tourism has identified five beaches to be upgraded for the coveted certification, viz. Pir Jahania, Niladri and Muhan Beaches in Puri District and Haripur and Pati Sonapur Beaches in Ganjam District.

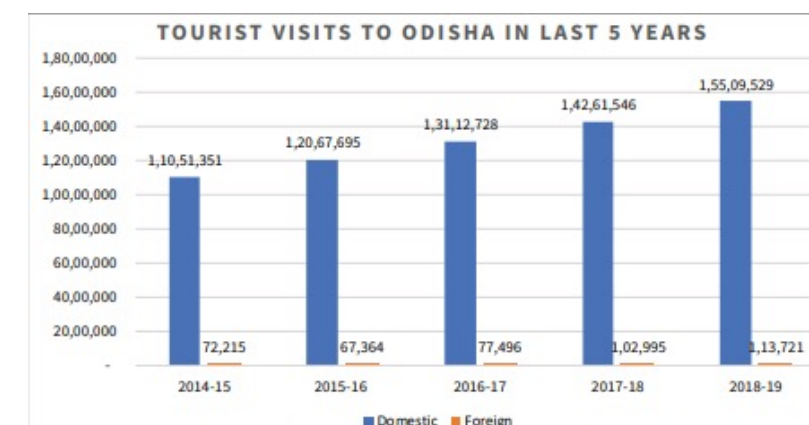
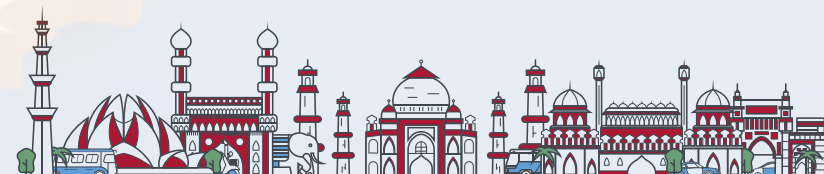
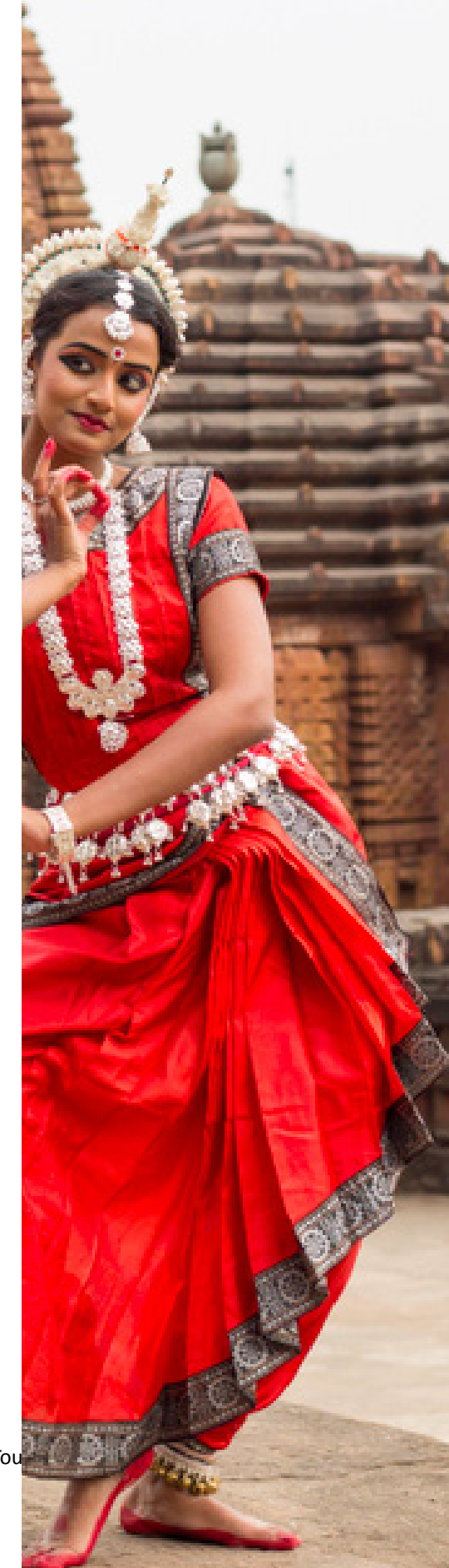


Figure-10: Tourist Visits to Odisha in the last five years

There has been a steady increase in the arrival rate of tourists in the state. During 2018-19, the tourist arrivals in Odisha was around 15.6 million as compared to 14.3 million in 2017-18, indicating a growth rate of 8.76%. The tourism intensity in Odisha is 29 percent higher than the national-level tourism intensity (National Council of Applied Economic Research, 2015). Despite the numerous offerings in the state, the opportunities within the tourism industry are yet to be captured. The untapped potential of tourism in Odisha will require committed and sustained support from all stakeholders, especially the government and the private sector, for the state to give a boost to the tourism sector.



## State Government Initiatives

### Policy Initiatives

The current Odisha Tourism Policy, launched in the year 2016, aims to create an atmosphere which will attract more investment through liberalized incentives and benefits.

- To promote Sustainable & Green Tourism with a view to create employment opportunities and to bring about socio-economic benefits to the community.
- To preserve, enrich and promote Odisha's unique cultural heritage, natural resources and environment with a view to achieve inclusive development; addressing the regulatory & tourism promotion/ development functions in Private Public Partnership (PPP) mode at all levels in an effective & well-coordinated manner.
- To promote Odisha as one stop destination to experience its great history, culture society and natural beauty so as to boost foreign & domestic tourist arrival in the State.
- To promote circuit tourism in association with other States of the Eastern Zone of the country to facilitate easy arrival and movement of the tourist.
- To upgrade skill & professionalism and promote employment opportunities in tourism sector.
- To promote digital tourism.
- To promote responsible tourism and develop tourism products in an environment friendly

manner.

- To promote barrier-free tourism.
- To promote (1) Beach Tourism, (2) Eco Tourism, (3) Buddhist Tourism, (4) Heritage Tourism, (5) Religious Tourism, (6) Knowledge Tourism, (7) Medical Tourism, (8) Travel Tourism, (9) Caravan Tourism, (10) Wellness Tourism, (11) Cruise Tourism, (12) Sand Art Tourism, (13) Adventure Tourism, in a mission mode.

### Infrastructure Assessment

The infrastructure of tourism development falls into two categories, basic infrastructure and tourist infrastructure. The basic facilities are provided by the government which include road, electricity, water, transport, postal & tele-communication, and medical care. The touristic facilities invite investments from the private sector which include accommodation, restaurant, public convenience, tours, and recreation services. Therefore, facilitated by the public sector, the private sector should play a lead in the development of the tourism industry.

Department of Tourism shall identify important state highways, roads connecting important tourist destination and recommend the appropriate department for widening, beautification & high-quality maintenance of these roads.

Efforts have been made to encourage private sector investors to cre-

ate Star category hotels, convention centers, heritage hotels, eco camps by granting different fiscal incentives, single window clearances facilities, marketing supports, media campaign etc.

### Product Development Initiative

There have been recent efforts made by the state that have the potential to transform the face of tourism in Odisha. The state has launched the country's first glamping festival, the Marine Drive Eco Retreat near the Konark Sun Temple. The state government has also introduced 'Eco-trails Odisha', a trekking and hiking program, to promote eco-tourism and educate tourists on flora and fauna of these destinations. The program has been launched by the Forest and Environment department at different eco-tourism destinations in 20 districts covering forest areas, valleys, meadows, hills, rivers and streams.

To promote water-based recreation in river Mahanadi, Odisha Tourism through Odisha Tourism Development Corporation (OTDC) has upgraded the existing infrastructure at the Silver City Boat Club, Cuttack which had been adversely impacted during Cyclone Fani. The new boat club includes a floating Jetty, Booking Counter and complex for lifeguards, toilet complex, a restaurant & bar, adequate parking space and a park with children's play area. The infrastructure will be further augmented in phases to add an ad-

### Further the following initiatives can be undertaken

**Wayside Amenities:** The Government has taken a policy decision to establish modern wayside amenities to provide quality services to the highway and roadside tourists. More wayside amenities shall be developed by synchronizing the activities of various Government Department such as Works, Transport, Forest and other concerned Departments.

**Buddhist & Heritage Tourism:** The State of Odisha is known for its rich heritage. The State Government shall promote heritage tourism to propagate its rich culture and heritage among the people of the world. State Government shall promote Buddhist tourism in view of the historical significance of Buddhism in the State. Special Buddhist Circuit will be developed by linking all the Buddhist sites.

**Cruise Tourism:** Considering the vast coastline, Chilika lake, long stretch of water bodies, lakes, there is vast scope for cruise tourism in the State. The State Government shall promote cruise tourism by bringing in modern cruises and technology.

**Religious Tourism:** Religious tourism has vast potential in the State in view of the presence of historic temples and monuments which shall be developed in a big way in the State.

**MICE Tourism:** The State houses major IT and ITES companies. The State shall promote meeting incen-

tive conference and events tourism, to cater the need of multinational companies and NGOs.

### Ease of Doing Business

The Government of Odisha has undertaken many historic reforms in all sectors of its economy for Ease of Doing Business in the State. It has implemented the momentous Right to Act 2012, the progressive Industrial Policy Resolution (IPR) 2015. These important steps have boosted the economy of the State and placed tourism in the forefront as a major factor in accelerating the progress of the State.

For speedy clearance of Tourism Projects single window clearance authority has been created which will issue deemed approvals as provided in Odisha Industries Facilitation Act, (OIFA) 2004. The Single Window Clearance Authority shall be made more effective, robust and more investor friendly. Right to service has been implemented in the state and the Department of Tourism shall rigorously implement the Right to Service Act for quick clearance of the projects.

### Marketing

Department of Tourism shall organize various tourism promotion events to attract tourists to the state.

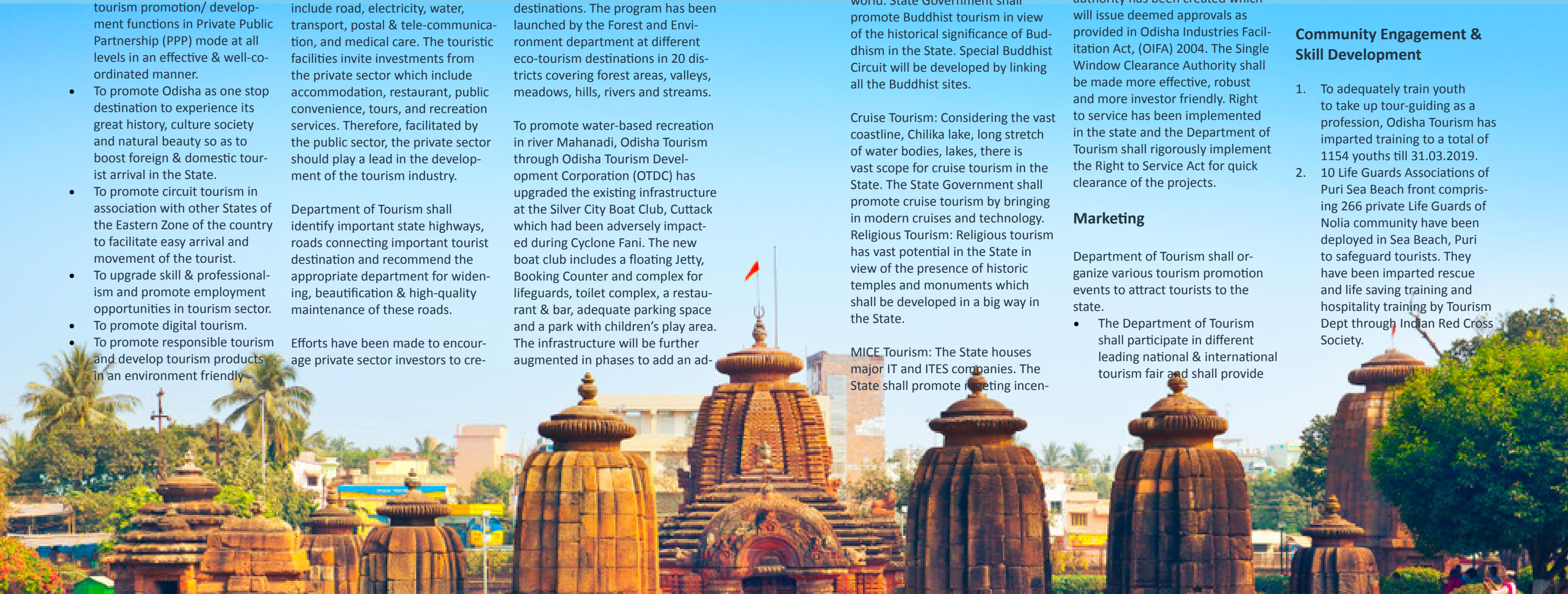
- The Department of Tourism shall participate in different leading national & international tourism fair and shall provide

incentives to the tourism stakeholders to participate in international tourism events to increase tourists arrival in state.

- Organize familiarization tours for leading tour operators, travel writers of the country and abroad to attract more foreign & domestic tourists.
- Extensive outdoor marketing within the country & abroad which include signages in airports, branding of trains, hoardings in strategic locations etc.
- Media campaign both in print & electronics within the country & abroad shall be done by the Government to attract more tourists to the State.
- Brand ambassador will be appointed for strengthening the brand name of Odisha Tourism.

### Community Engagement & Skill Development

1. To adequately train youth to take up tour-guiding as a profession, Odisha Tourism has imparted training to a total of 1154 youths till 31.03.2019.
2. 10 Life Guards Associations of Puri Sea Beach front comprising 266 private Life Guards of Nolia community have been deployed in Sea Beach, Puri to safeguard tourists. They have been imparted rescue and life saving training and hospitality training by Tourism Dept through Indian Red Cross Society.



## Tamil Nadu

### Tourism Potential of the State with some major key attractions

Tamil Nadu is a State with several prominent tourism genre, from mountains to beaches, massive monuments to timeless temples, wonderful wildlife and luscious vegetation. There are astonishing hill stations like Ooty, Kodaikanal, Yercaud, Elagiri, Javvadhu Hills, Kolli Hills, Sirumalai Hills, Valparai, Topslip, Parvathamalai Hills and Pachamalai Hills, and has excellent National Parks like Guindy National Park and Anamalai National Park. The wildlife sanctuaries in Mudumalai, Kodiakarai, Kalakkad, Mundanthurai and Berijam, and the Botanical Gardens in Ooty, Kodaikanal and Coimbatore are some of the most breath-taking tourist destinations. The State is also home to some of the UNESCO declared monuments like living Chola temples at Thanjavur, Darasuram and Gangaikondacholapuram, monuments at Mamallapuram and Nilgiris Heritage Train. The vast coastline of Tamil Nadu has many tourist beaches like the Marina, Elliots, Thiruvanimiyur, Tiruchendur, Rameswaram and Kanniyakumari. The temples of Tamil Nadu like the Madurai, Rameswaram, Kumbakonam, Chidambaram, Thanjavur resonate deeply with spirituality and music.

Tamil Nadu with its unique culture and abundant tourism potential attracts tourists from all across the world throughout the year. As the spots get over-crowded during the seasons, Tamil Nadu Tourism has been taking prevailing efforts to promote tourist places by providing

basic infrastructure like public convenience, rest shed, drinking water, road improvement, car parking, etc., for better and seamless tourist facilitation.

### Policy Initiatives

The Tamil Nadu Government is undertaking few measures to boost tourism, including a master plan to improve infrastructure at 300 tourist sites along with a tourism policy. The Tourism Destination Development Scheme would be formulated for the development of various sites along with adventure and eco-camping sites. Helipads would be established to encourage helicopter services between Rameswaram, Madurai and Kodaikanal to promote Heli-tourism.

To highlight the hospitality services offered by the Tamil Nadu Tourism Development Corporation (TTDC) on websites such as MakeMyTrip, Yatra and Goibibo, various steps will be taken for marketing and branding of Tamil Nadu as a tourism destination. Feasibility study of operating cable-cars to hill stations, ship and boat services between tourist towns and spiritual destinations will also be given key consideration to boost the tourism in the State. The Department of Tourism in collaboration with the Tamil Nadu Skill Development Corporation, would introduce a tourism hospitality skill development and certification programme. A proper regulatory framework with we prepared for the caravan operators and those leading trekkers and hikers to campsites to introduce caravan tourism and boost adventure tourism in the State. Rural and Plantation

tourism would also be encouraged at Udthagamandalam, Kodaikkanal, Megamalai and Kanniyakumari. A Tourism Award would be inaugurated for hoteliers, tour operators, forex companies, travel agents and restaurant owners to encourage the tourism stakeholders.

### Infrastructure Assessment

Tamil Nadu Tourism Development Corporation (TTDC) aims at promoting tourism in Tamil Nadu by building tourism related infrastructure on commercial basis. TTDC made a modest beginning by taking over 5 Government bungalows and operated 2 coaches. It has made rapid developments since then and presently it has earned the proud distinction of owning the longest chain of hotels in South India numbering 53. The fleet of coaches has increased to 12. TTDC is providing the following facilities covering all the major tourists destinations in the state for the benefit of tourists.

- Hotels
- Youth Hostels
- Restaurants
- Boat Houses
- Telescope Houses
- Lake park
- Petrol Bunk
- Coaches for operation of Tours
- Exhibition site at Island Ground for conduct of exhibitions.

The agency is operating Youth Hostels, wherein dormitory style accommodation is provided to the budget tourists. This has helped the tourists to avail low-cost accommodation even during the peak season in Ooty, Kodaikanal and Yercaud.

### To promote Tamil Nadu as a priority tourist destination at both the national and international level, The Tourism Department has formulated the following strategies

- Integrated development of high-priority tourism infrastructure in high potential tourism circuits.
- Encouragement of private sector and community participation in tourism.
- Participation in Domestic and International Marketing meets, Publicity Campaigns, Exhibitions and conduct of Road shows.
- Development of Coastal Tourism.
- Improved co-ordination efforts of multiple agencies.
- Enhanced connectivity, utilities and tourist services.
- Development of Meetings, Incentives, Conventions, Exhibitions (MICE) Tourism, Niche Tourism, etc.
- Promotion of environmentally and culturally sustainable and socially inclusive tourism development.
- Development of Eco-Tourism holistically without causing damage to environment and wildlife.
- Capacity building and human resources development for sustainable tourism and destination management through employment generation, poverty alleviation, environmental regeneration, advancement of woman and disadvantaged groups.

### Community Engagement & Skill Development

Guides training is a pivotal role in Tourism promotion and are responsible for entertaining the image of the State and the Country, giving factual information, caring for the safety of tourists and ensuring their comfortable stay. Guide Training programme is being conducted regularly in the state to inculcate knowledge, skills and competence to all tourism stakeholders to render quality service to the tourists.

### Product Development

TTDC has launched the Online Realtime Reservation System for all TTDC hotels across Tamil Nadu for booking of rooms in any hotels on real time basis as well as for booking of any tours conducted by TTDC. There has been a hike in revenue through these E-booking facilities every year. The revenue generated through Online Bookings alone was INR 14 Crores during 2018–19 as compared to revenue of INR12.80 Crores earned during the previous year. Virtual Tours have also been hosted on the website covering 46 Tourist spots in Tamil Nadu. Tourists visiting the site will have the experience of “virtually” visiting these places with a 360-degree vision of these places through digital technology.

The “Centralised Reservation System” implemented in all sales counters across Tamil Nadu enables tourists to book rooms in any of TTDC hotels or book any TTDC Tours in any sales counters across Tamil Nadu.

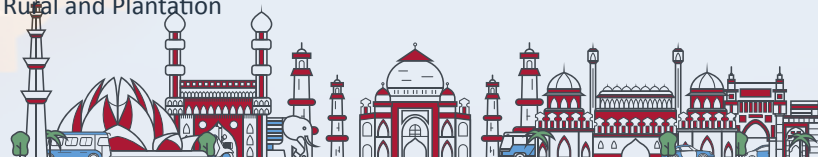
The “Hotel Management System” implemented in all TTDC hotels across Tamil Nadu enables the tourists to check-in, check-out etc.,

in any of these TTDC hotels at any time.

TTDC has implemented New Boat House Management software with salient feature of capturing the boat riding timings at Boat Houses of TTDC viz., Ooty, Pitchavaram, Yercaud, Kodaikanal-I and Kodaikanal-II to avoid pilferage in the billing of tickets and to monitor availability of boats.

### Marketing & Branding

- Tie-up arrangements have been made with Air India, under credit scheme for providing holiday home facilities at TTDC Hotels. TTDC has earned a revenue of INR 12.13 Lakhs during the period from April 2018 to March 2019.
- Tie-up arrangement also have been made with the following departments under deposit accommodation scheme for providing holiday home facilities at TTDC hotels and TTDC has earned a deposit of INR 180 lakhs.
- Promotional Initiatives were taken up by encouraging leading companies for holding Conferences / Workshops at Beach Resort Complex, Mamallapuram
- TTDC has implemented Wi-fi facility in eight TTDC hotels viz., Hotel Tamilnadu – Kanniyakumari, Trichy, Thanjavur, Thiruchendur, Yercaud, Hogenakkal, Kancheepuram and Rameswaram in the year 2018-19 for the benefit of tourists who are staying in TTDC hotels.
- The Agency has introduced online ticketing system for Industrial & Trade Fair, Chennai for visitors to book their







entrance tickets and mini train ride tickets during the year 2018-2019.

- Digital Marketing has been created through Social Media Platforms like Facebook, Twitter, You Tube, Instagram etc., to interact and share current information with tourists. Through this campaign in Facebook, the events of tourism have reached to more than 1.30 crores of people in the year 2018-19.

## Madhya Pradesh

### Tourism Potential of the State with some major key attractions

From heritage sites to national parks, Madhya Pradesh has among the most attractive destinations in India. Home to three UNESCO world heritage site namely- Sanchi, Bhimbetka & Khajuraho, Madhya Pradesh attracts tourists from across the globe. The state also boasts of 11 national parks, 24 wildlife sanctuaries and 6 tiger reserves. Madhya Pradesh is blessed

with some beautiful landscape and is a paradise for nature lovers. With plentiful of places to satisfy your love for landscape and beauty, the state certainly captures a piece of your heart for all the beauties that lie there.

### Policy Initiatives

The tourism policy is based on the following guiding principles:

- Set up such institutional mechanism which will promote private investment as directed by the State Government.
- Set up an effective regulatory mechanism for sustainable tourism.
- Undertake measures to provide reception, assistance, information, amenities and ensure hygiene, security and infrastructure for the tourists.
- Conservation of heritage and making them places of tourist attraction.
- Eco-tourism to be the tool to sensitize masses about environmental conservation.
- Establish active and coordinat-

ed participation of Government departments, voluntary organizations, the local community and other stakeholders of tourism sector.

- Appropriate development of tourism based projects through Public Private Partnership (PPP)
- Designation of 25 tourist circuits for commercial tax exemption for tourist vehicles

### Infrastructure Assessment

Madhya Pradesh has two full-fledged domestic airports at Bhopal and Indore, it has smaller airports in Gwalior and Khajuraho - key tourist destinations, and 25 airstrips at a number of locations with regular services.

The total length of the railway network in Madhya Pradesh is 5992 km. Of this, almost 1,880 km is electrified track.

The Madhya Pradesh government has accorded high priority to improve the road infrastructure in the state and has been successful in attracting private sector partic-

ipation (PSP) in the development of highways. It has constructed 17 bridges and bypasses to four of its cities through PSP.

The total length of roads in Madhya Pradesh stands at over 160,000 km. Road density stands at 52.2 km per 100 sq. km. The state has 18 national highways - a length of 4,664 km passing through it.

### Community Engagement & Skill Development

- Youth shall be educated and trained in trades relevant to the tourism industry, through State Institute of Hospitality Management (SIHM), Madhya Pradesh Institute of Hospitality Training (MPIHT) and Food Craft Institute (FCI) to ensure

employment oriented skill development education in the tourism sector.

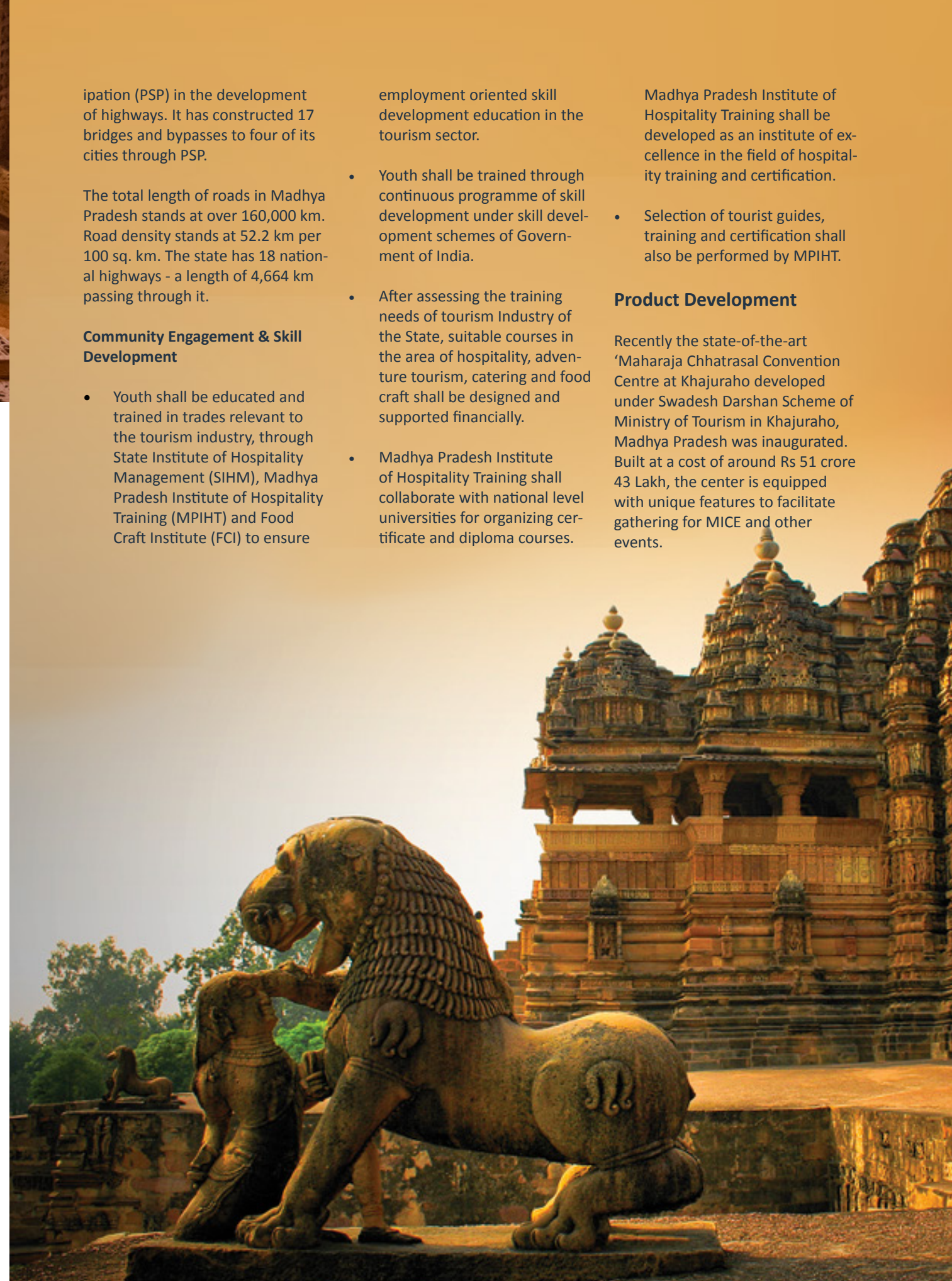
- Youth shall be trained through continuous programme of skill development under skill development schemes of Government of India.
- After assessing the training needs of tourism Industry of the State, suitable courses in the area of hospitality, adventure tourism, catering and food craft shall be designed and supported financially.
- Madhya Pradesh Institute of Hospitality Training shall collaborate with national level universities for organizing certificate and diploma courses.

Madhya Pradesh Institute of Hospitality Training shall be developed as an institute of excellence in the field of hospitality training and certification.

- Selection of tourist guides, training and certification shall also be performed by MPIHT.

### Product Development

Recently the state-of-the-art 'Maharaja Chhatrasal Convention Centre at Khajuraho developed under Swadesh Darshan Scheme of Ministry of Tourism in Khajuraho, Madhya Pradesh was inaugurated. Built at a cost of around Rs 51 crore 43 Lakh, the center is equipped with unique features to facilitate gathering for MICE and other events.



## West Bengal

### Tourism Potential of the State with some major key attractions

Between 2001 and 2017, the total tourist footfall in the State has increased from 5.2 million to a staggering 81.2 million at a CAGR of 18.74%. During the same period, the number of foreign tourists in the State has grown from 2.8 lacs to 15.7 lacs at a CAGR of 11.37%.

The beautiful state of West Bengal attracts a significant number of tourists every year as the state is jewelled with mesmerising landscapes, snow-clad mountains, gushing sea, blossoming tea gardens, enormous deltas, lush green forests, plentiful wildlife, ancient temples and magnificent British monuments. The Tiger Hill, the Howrah Bridge, the Tea Gardens are some of the famous tourist spots which offer an insight into the vast culture and history of the West Bengal. The culture of the state is adorned by colourful fairs and fes-

tivals every month. A vast number of famous pilgrimages also attract a large number of tourists of all faiths and beliefs.

**West Bengal is home to two heritage sites viz. Darjeeling Himalyan Railways and Sunderbans National Park**

### State Government Initiatives

#### Policy Initiatives:

- To strengthen and develop tourism infrastructure in terms of road connectivity, wayside amenities, power connectivity till last mile, waste disposal system, TRC/TFCs etc.
- To be positioned among the leading tourist destination in the country in terms of number of footfalls, as well as quality of tourism services provided by FY 2021.
- 3. To promote theme based tourism projects under eco-tourism, religious, cultural

heritage. MICE, rural and homestays, and medical tourism.

- To ensure standardized tourism services by grading and accreditation of hotels, resorts, wayside amenities, homestays, tour and travel operators and other tourism services in the state.
- To offer world class experience to visitors while offering unique and diverse tourism products and service.

#### Infrastructure Assessment:

West Bengal has a total road length of around 316,730 km. The national highways running through the state cover approximately 3,664 km. West Bengal is well connected through the railway network. The length of railways was around 4,135 km as of March 2019. Howrah, Asansol, Sealdah, Bandel, Bardhaman, Kharagpur and New Jalpaiguri are the main junctions in West Bengal.

### Product Development Initiative

Recognising the immense opportunities of the emerging tourism segment of the state towards revenue generation and employment creation, the State Government intends to devise focused promotional framework for each segment and link them with other various prominent aspects of the state's economy such as culture, heritage, industries, food, tea etc.

In 2019-20, 22 new tourist projects were undertaken including beautification of Jagannath Temple at Digha and Riverside beautification of Ganga at Diamond Harbour in South 24 Parganas.

The state is also promoting MICE tourism in Digha, Mandarmoni, Bagdogra, Siliguri, Durgapur, Bhrmaputra with necessary augmentation of physical and support infrastructure.

Introduction of customized travel experience, luxury spa sessions, visit to wildlife sanctuaries, culinary tours, religious pilgrimage tours etc. will be integrated with MICE industry.

The state is encouraging tea and jute tourism by linking them to other tourism products.

### Ease of Doing Business

- Single Window: Setup a single window (Shilpa Sathi) for large industries and MSME Facilitation Centre (MFC) for MSMEs. As part of Shilpa Sathi, Department representatives physically come to the single window on defined days to monitor progress and expedite clearances
- Infrastructure: Defined clear timelines for electricity, water and sewer connections. The state has also implemented an online application for electricity connections
- Land: Implemented an online application for property registration and payment
- Environment: Exempted 49 industries/activities from pollution control board clearances as a prerequisite to start business

### Marketing

The State Government intends to reinforce the brand of Bengal

Tourism as one of the most preferred tourist destination of choice through effective marketing and promotional campaigns.

- The state government will adopt a 360 degree media campaigns for the promotion of the tourism sector of the state. Aggressive campaigns will be launched on social media platforms like Facebook, Twitter, Youtube, etc. for promoting the sector of the state.
- Separate bespoke branding and promotional campaigns shall be prepared targeting domestic and foreign tourist markets via both online and physical channel.
- Travel bloggers and film makers around the world will be invited to promote local destination of West Bengal.
- Department of Tourism in association with industry chambers and associations will organize annual events exclusively on promoting the tourism sector of the state. The platform will be used to honor individuals/organisations doing exemplary work in the field of tourism in the state.





## Kerala

Kerala has made admirable progress in tourism development in recent years. God's own Country has become a well-recognised tourism brand and the State has achieved impressive growth in foreign tourist arrivals in particular.

The State's Tourism Vision 2025 envisages sustainable development of tourism with focus on backwaters, ayurveda and eco-tourism. Also, a fairly detailed road map has been set out by way of:

Kerala's principal tourism products fall into six categories:

- Heritage/cultural/religious sites & events,
- Backwaters,
- Beaches,
- Hill stations,
- Wildlife sanctuaries and
- Ayurveda,

With the common cord of green environs harmonising them all together to form a Green Symphony Tourist Potential of the State with some major key attractions. Kerala experience high foreign tourist arrivals as it is one of the advanced centre for Ayurveda and wellness facilities.

Some of the prominent tourist destination in Kerala:

### Kasaragod

World renowned for its coir and handloom industries, this land of gods, forts, rivers, hills and beautiful beaches is a potential hub for tourism investment projects.

### Kozhikode

Lush green country sides, serene beaches, historic sites, wildlife sanctuaries, rivers, hills, a unique culture and warm ambience make this place ideal for tourism investments.

### Wayanad

Known for its picturesque mist-clad hill stations, sprawling spice plantations, luxuriant forests and rich cultural traditions, this region close to Mysore, Bangalore and Ooty investment is attractive place for investments

### Malapurram

Bounded by the Nilgiri Hills in the east and the Arabian Sea in the west, Malappuram is a land of rich cultural heritage and diverse natural attractions. This region as yet fully unexplored presents investors with varied and wonderful investment opportunities

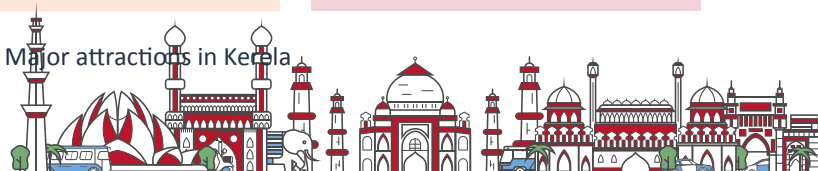
### Ernakulam

The commercial capital and the most cosmopolitan city of Kerala, Kochi in Ernakulam, with its natural harbour and distinctive culture offers tremendous investment opportunities in the tourism sector.

### Alappuzha

Referred to as the Venice of the East, this backwater country is also home to diverse animal and birdlife and has many opportunities for tourism developmental investments.

Figure-13: Major attractions in Kerala



## Tourism statistics

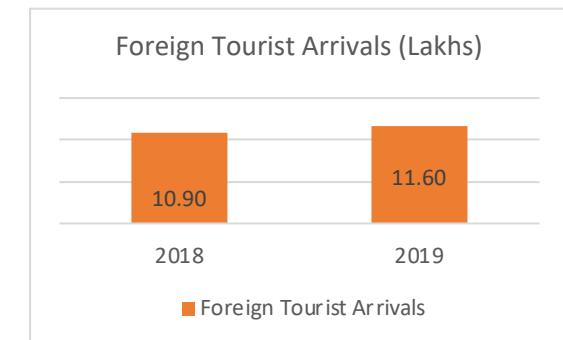
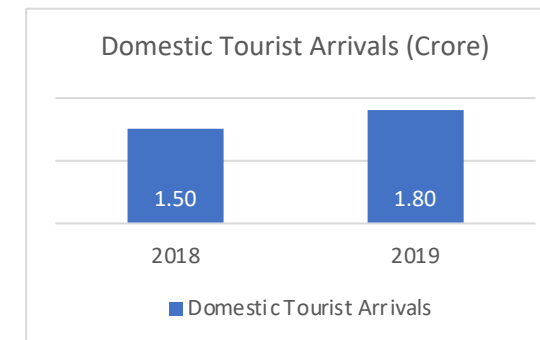


Figure-14: Tourist Arrival in Kerala

## Policy Initiatives

Kerala's Tourism Vision 2025 envisages a growth rate of 7% per annum in foreign tourist arrivals and 9% annual growth in domestic tourist arrivals. With the incredible sights and sounds of God's Own Country Kerala is one of the most popular destinations of the millennium. This has opened a whole new world of investment opportunities in the state. To tap this vast potential the Government of Kerala has come up with various schemes and projects for the investors.

The schemes include subsidies, technical guidance, marketing assistance, publicity through government publications, help in availing loans etc. Apart from these,

approved tourism related projects are also eligible for incentives from the Government of India.

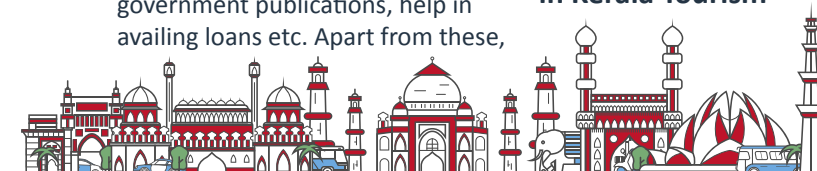
Kerala Tourism Infrastructure Limited is established under the Govt. of Kerala, is the agency for tourism investment promotion and infrastructure development in Kerala. It was incorporated in August 1989.

KTIL pioneered the Public Private Partnership (PPP) model in tourism infrastructure development in Kerala. KTIL is engaged in building up fully government owned projects.

## Opportunities of Investment in Kerala Tourism

- Ayurveda Centres
- Houseboats
- Hotels/Resorts
- Restaurants
- Vazhiyoram
- Green Farms
- Amusement Parks & Recreation Centres
- Souvenirs
- Homestays
- Grihasthali

Figure-15: Investment Opportunities in Kerala Tourism Investment Potential in India



## Incentives

Apart from Concession in electricity charges & Guidance and publicity support from the State Government, the state government provides following incentives:

### Ayurveda centres

Ayurveda centres which have been classified/approved by the Government of Kerala, will be eligible for financial concessions/incentives Investment subsidy up to 10% subject to a maximum of Rs. 10 lakhs Support to avail loans from state financial corporations.

### Houseboats

approved by the Department of Tourism under this scheme will be eligible for claiming 10% state investment subsidy subject to a maximum of Rs. 10 lakhs Support to avail loans from state financial corporations

### Amusement Parks

Amusement Parks and Recreation Centres approved by the Kerala State Department of Tourism are eligible for investment subsidy up to 10% subject to a ceiling of Rs. 10 lakhs

### Hotels / Resorts

Hotels classified by Ministry of Tourism, Government of India will be eligible for claiming 10% state investment subsidy subject to a

maximum of Rs. 10 lakhs. Additional incentive of 15% of the investment subject to a maximum of Rs. 5 lakhs for pollution control measures

## Infrastructure Assessment

### Airports

There are 4 operational international airports in Kerala at Trivandrum, Cochin, Calicut and Kannur. These are well connected with the rest of the country and the world.

### Roads Network

Kerala added 500 km of National Highway during 2014-18. Roads in Kerala include 1,812 kilometres of national highway; 1.6% of the nation's total, 4,342 kilometres of state highway; 2.5% of the nation's total, 27,470 kilometres of district roads; 4.7% of the nation's total,

Sr. No.	Road Type	Length (in km)
1	National Highway	1812
2	State Highway	4342
3	Major District Road	27470
4	Other District Road	33201
5	Village Road	158,775

Types and length of Roads in Kerala

Table-8: Road Network in Kerala

33,201 kilometres of urban (municipal) roads; 6.3% of the nation's total, and 158,775 kilometres of rural roads; 3.8% of the nation's total.

### Accommodation

There are over 800 hotels/ resorts in Kerala offering 15,478 rooms for tourists.

## Haryana

### Tourism Potential of the State with some major key attractions

The State of Haryana represents the modern side of India. With keeping their roots and culture strong and progressing with the fast-moving world, Haryana has positioned among one of the wealthiest and most economically developed regions in South Asia. The State has a diverse range of landscapes, showcasing the beautiful archaeology and celebrating the art and culture. The major key attractions of the state are the flourishing art and culture of the State and the major achievements in agriculture and industrialization.

### Policy Initiatives

In the effort to boost the tourism sector of the State, the Government of Haryana has unveiled its Tourism Policy, which aims at promoting tourism as a major engine of economic growth and capitalize potential of sustainable tourism. It aims at promoting sustainable tourism by encouraging a constructive and mutually beneficial partnership between public and private sector for economic development and employment generation. The policy seeks the state government to seek the earning form the tourism inflow at the rate of 10% annually.

The Tourism Policy aims to broaden and diversify the concept of tourism from Highway Tourism to Eco Tourism, Adventure Tourism, Pilgrim Tourism, Farm Tourism, Golf Tourism, Medical Tourism, and Heritage Tourism to meet the new market requirements and boost the tourism sector of the State. The State Government will enhance the infrastructure particularly in the NCR region besides enhancing professional excellence in training human resources and providing infrastructure for human resource development. To attract domestic and foreign investment, a strategical framework for the development of tourism for strengthening tourism related infrastructure in the state has been developed.

### Infrastructure Assessment

Tourism offers several benefits to economy, employment, traditional craft/skill etc. But traditional accommodation offered in hotels or resorts lack in decentralization of these benefits. With this, the State of Haryana introduced the Haryana Home Stay Scheme 2020. The aim of this home stay scheme is to enlarge the market by making more accommodation rooms on offer as well as reducing the price-point of offering such accommodation rooms. The scheme will also boost decentralization of benefits of tourism to large number of people who have properties available for use and such property requires little investment to offer it as tourist accommodation. The scheme also aims to provide proprietors common advertising or marketing platform as well as basic training in hospitality.



From tourist point of view, the scheme will provide lot of options of accommodation rooms at various locations at competitive price-points. Customers who want longer stays, will also benefit from such scheme. The proprietor/owner is supposed to provide home cooked food, stay facilities, and show the visitor the agricultural practices such as floriculture, harvesting, bee keeping, dairying etc. and introduce to him the village way of life through various participatory activities, giving an exposure of the local community life.

#### Community Engagement & Skill Development

Community participation is a very important part of this concept as the scheme envisaged visit to the village, interaction with local people and attending village functions etc. Tourists gets an exposure of local community life which means experiencing an exposure of local songs, local walk, trek, paragliding, potteries, food, dances, art & craft, and local drink etc. The tour of village includes visiting the local artisans like the carpenter, blacksmith etc. The visitors can experience festival occasion such as marriage and local melas. They can also participate or witness village games such as camel cart ride, bullock ride, artisans display, mehndi, folk music and dance, village safari, wrestling, gulidanda, kite flying, ride on tractor etc. 12 hours training of the eligible selected home-stay proprietors will be provided by concerned, IHM on payment of prescribed fees. IHM shall include booking aggregator also in the training. The training shall include skills in bed-making,

cleanliness & hygiene, serving, etiquettes, courtesy etc.

#### Marketing & Branding

Haryana Tourism is currently concentrating more on indirect medium like Television, Newspaper, and social media via two schemes, namely, Domestic Promotion and Publicity, and Foreign Promotion and Publicity. With the help of their official tourism website, the Haryana Tourism Corporation also promotes different types of tourism and festivals. Event-base campaigns, promoting the brand "Haryana Tourism" and the tagline, "Come, Holiday with us!" during various events and activities, like the Haryana Travel Mart, Surajkund International Crafts Mela (Faridabad), Dance and Music Festival, World Travel Mart London, and international road shows. Mass-media campaigns to build the brand via print and media sources. In addition to that, installation of Bluetooth kiosks and hotspot in major malls, airport, bus stations, railway stations, etc, has been done.

The Department has launched aggressive campaigns on social media platforms like Facebook, Twitter, Youtube, etc. for promoting Home Stays in the State. Haryana State has strong flair for cultural fairs and festivals which have immense potential

to attract tourists. Home Stay based tourism activities will be promoted as packages in major fairs and festivals of the State to ensure economic benefit to the local community.

The Department will also be facilitating tie ups with Home Stay Service Providers to provide market linkage to Home Stay Proprietors for attracting wide range of market segments including young people, families, and international tourists. Department of Tourism, in association with industry chambers and associations, have organized an annual event exclusively on promoting Home Stays. The platform will be used to felicitate proprietor individual/organizations doing exemplary work in the field of Home Stay tourism in Haryana.

## Manipur

### Tourism Potential of the State with some major key attractions

The State of Manipur is located in the North-eastern corner of India. The state serves as a corridor for India to the Southeast Asian countries and offers immense possibilities for growth of tourism and regional business. Least touched and least discovered, Manipur is a promising tourist destination for adventure and nature lovers alike.

The state has a rich cultural past and is the birthplace of a renowned form of classical dance- Raas Lila, which was created by Maharaja Bhagyachandra. It is a land of festivals and almost every month the people of Manipur get together to celebrate various festivals which reflects its rich culture, traditions and religious practices.

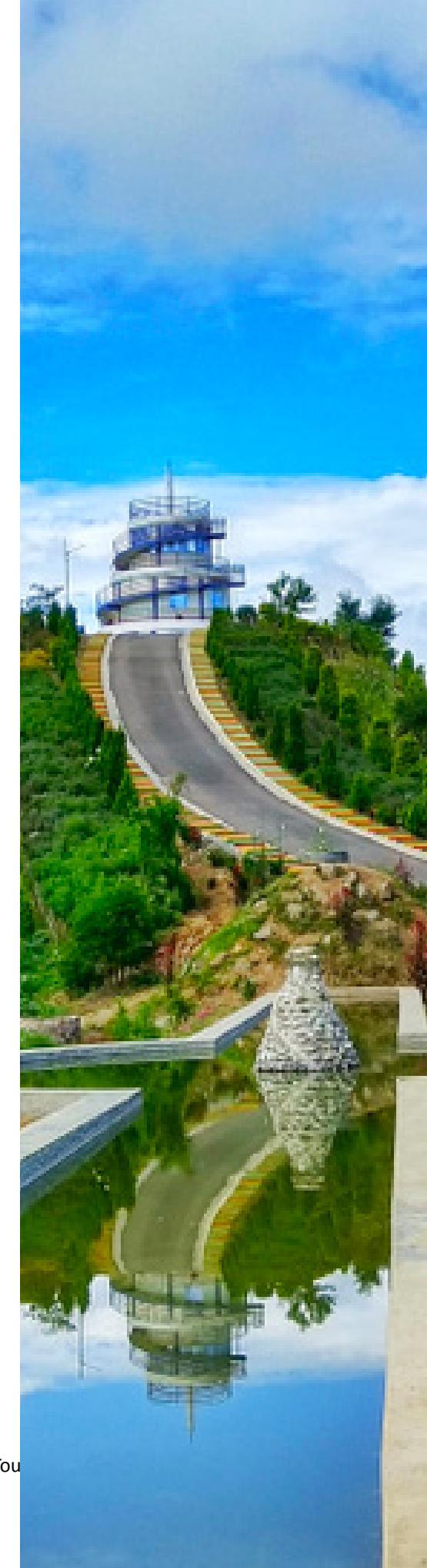
The state has a travel friendly climate that makes anytime of the year favourable for visitors. The state experiences an amiable climate throughout the year though winters can be sometimes very cold. The maximum temperature in the summer months is 32 °C (90 °F). In winter the temperature often falls below 0 °C (32 °F), bringing frost.

### Policy Initiatives

A small remote land-locked State like Manipur where there is less scope of industrial development, the rich cultural heritage and sublime natural beauty of the State promises to emerge as the main avenue for creating employment opportunities, income generation and alleviating poverty through tourism. Accordingly, the State policies propose a framework to facilitate incentives/subsidies for development and promotion of the tourism industry in the State.

The tourism industry promises to provide significant direct and indirect employment as employment creation potential for investments made in tourism sector promises to be higher than in manufacturing and agricultural sectors. Tourism development would also help significantly in the development of cottage industries and handloom & handicrafts, and thereby promote overall area development and development of weaker sections of the society.

The immediate priority of the State Tourism Department is on creating world class accommodation & infrastructure, identification, improvement and up-gradation of destinations and other tourism assets and making these operational under Public-Private Partnership. Promotion, publicity and marketing are the core of State Tourism Development and need to be undertaken in conformity with the tourist profiles and product characteristics.



The State believes in the necessity of developing sustainable and responsible tourism to ensure preservation and protection of tourist destinations and treats the same as the foremost priority of the State Tourism Department. It will not only secure long-term gains but also help mitigate the adverse impacts of tourism development.

### Tourism Infrastructures Development

Homestays are an important aspect of sustainable tourism and provide a means of sustainable income for the homeowners. Locals get to benefit directly leading to a larger benefit of the local community, and Manipur being a state with unique culture and traditions and a varied landscape offering has a great potential to develop and benefit from homestays. The State Tourism Department has released common standards and guidelines for Establishment/Classification of Bed & Breakfast Establishments, Homestay Establishments in the State of Manipur to empower the locals to generate a sustainable source of livelihood and in return provide tourists an insight into the rich and diverse cultural heritage of the state.

### Development of Tourism Circuits

Manipur with vast cultural and religious heritage and varied natural attractions has immense potential for growth in the tourism sector. Travel circuits and destinations have been developed through joint efforts of the Central Government, the State Government and the Private Sector. Loktak Lake and its vicinity has been

declared as Special Tourism Area for integrated development. Intensive steps have been taken to work towards the integrated development of all the tourist circuits with the involvement of all the infrastructure departments and the private sector, for the development of Tourist Circuit in Manipur : (Imphal – Khongjom) under Swadesh Darshan Scheme (I) and the development of the Spiritual Circuit in Manipur under Swadesh Darshan Scheme (II): Shree Bijoy Govinda Temple, Shree Govindajee Temple, Kaina Temple, Shree Bungshibudon Temple Khangabok, and Shree Gopinath Temple.

### Product Development

- Giving guidance and financial assistance for preparing tourism Master Plans and perspective plans identifying tourism resources, prioritising development circuits and projects and specifying the most suitable forms of tourism.
- Implementing integrated/intensive development of tourist destinations after assessing the carrying capacity, local aspirations and the benefits likely to accrue to the community.
- Involving the Town and Planning Department and integration of spatial-economic development plans with tourism development.
- Focusing on the development of Eco-tourism.
- Developing the places of pilgrimage by providing the requisite infrastructural facilities with a view to promote domestic and international pilgrim tourism.
- Develop a clear identity/theme around some important existing attractions and package them

to offer an attractive product.

- Expand ‘Events Tourism’ through organization of events such as sports, conferences etc.; also market existing cultural and religious festivals as tourist attractions.
- Expand ‘Shopping Tourism’ through good value for money with the exquisite range of handcrafted products made in the State.
- Develop ‘Lake Cruise Tourism’ at Loktak Lake.
- Developing heritage and village tourism as a package by identifying and developing villages around heritage properties, which have already been restored.
- Diversifying the tourism product to make Manipur an unique multi-attraction tourism destination which can meet the needs of all forms of tourism particularly rural tourism, ecotourism, adventure tourism, incentive tourism, conference and convention tourism, etc.
- Developing natural health resorts.
- Developing seamless inter-modal transfers by improving linkages.
- Amusement parks promote tourism by attracting both international and domestic tourists, generate demand in the transport, accommodation and service sectors and create employment opportunities. The State Government will prepare appropriate guidelines to encourage private sector to invest in development of amusement parks

### Marketing & Branding

- Achieving effective co-ordination and synergy with other Departments, agencies and the private sector in tourism promotion and marketing.
- Fully utilising the Indian Missions abroad for tourism promotion and related activities.
- Identifying potential tourism markets and segments and adopting focused marketing strategies based on research to make promotional and marketing efforts cost effective.
- Enhancing the image of Manipur as a fascinating multi-attraction and multi-activity destination with rich cultural heritage and a vibrant society.
- Organizing photo exhibitions and creation of a photo library.
- Launching of a multi-media CD-ROM and creating an integrated website on Manipur tourism.
- Developing a clear identity of Manipur Tourism product by promoting selected theme based tourist attractions

### Post Covid Revival Strategy

To promote tourism, post the Covid-19 pandemic, Manipur is planning to set up eco-tourism facilities at all the 60 assembly constituencies in the state. Presently homestay is available in the state capital besides Moirang in Bishnupur district and Ukhrul in Ukhrul district, and promotion of the same has been encouraged for the other parts of the state. The Government is keen to take advantage of the ongoing developments and therefore, seeks to create a unique brand to market Manipur Tourism as the ‘Gateway to South-East Asia’ in conformity with its modern outlook, relevance, competitiveness, strategic location and commercial aspects. The Mission of the ‘Policy’ is to promote sustainable tourism as a means of economic growth, social integration and to promote the image of Manipur as a State with a glorious past, a vibrant present and a bright future. Policies to achieve this will be evolved around six broad areas such as Welcome,

Information, Facilitation, Safety, Cooperation and Infrastructure Development. Conservation of heritage, natural environment and development and promotion of tourism products would also be given importance.





## Andhra Pradesh

### Tourism Potential of the State with some major key attractions

Andhra Pradesh is a land of abundant Tourism potential. With the second longest coastline in the country – 974 kilometers, a rich spiritual and cultural heritage, ancient and historical religious places, serene valleys and hills, forts, national parks, bird sanctuaries, caves, airports, seaports etc., the State of Andhra Pradesh holds vast tourism potential.

The Government intends to build world-class luxury resorts and other tourism infrastructure, attract large scale investments, develop unique products, and position the State as a preferred tourism destination. The state has adopted the Hub & Spoke model of tourism destination development, for key regions in the state. These destinations can be developed as Hub locations and all the smaller tourism attractions in the region around the hub locations can be combined to form a Hub-Spoke Circuit. While this model is convenient for tourists to plan their tours, it shall also ensure tourist footfalls across all important tourist destinations in a specific hub-spoke, thereby increasing the average duration of tourist stay in the circuit & the average spend per tourist, directly augmenting the overall economic contribution to the region/ state. The following five tourism hubs are proposed for development by Andhra Pradesh state.

- Visakhapatnam,
- Konaseema -Rajahmundry – Kakinada,
- Amaravati – Vijayawada
- Tirupati – Nellore &
- Ananthapuramu – Kurnool - Kadapa.



Figure-8: Andhra Pradesh Tourism Highlights

Andhra Pradesh Tourism has several exclusive attractions that are unique strengths of the state and provide amazing experiences to tourists. While the state contains innumerable temples that have very strong mythological, religious and spiritual importance, AP is also known for virgin beaches, backwaters, green belt along the coast, Buddhist & Heritage sites and most importantly its rich and varied collection of specialized Arts and Crafts that are practiced by groups of specially skilled Artisans over several generations. The various key attractions/ destinations across the 13 districts of the state are enlisted below in four broad categories.

### State Government Initiatives

#### Policy Initiatives

- Theme-based development: It will focus on developing tourism projects under themes of beach & water-based, eco-tourism, Buddhist, religious, heritage, MICE & infrastructure development, recreation/adventure, spiritual/wellness and medical.
- Destination-based development through Hub & Spoke model: It will focus on de-

veloping tourism circuits on a hub & spoke model. The emphasis will be on developing five important tourism hubs (Visakhapatnam, Vijayawada, Tirupati, RajahmundryKakinada and Srisailem-Nagarjuna Sagar) by 2020, and all other district headquarters as tourism hubs by 2029. Through this policy, GoAP endeavors to make the state more conducive and attractive for potential investors and provide an impetus to the tourism sector

#### Various policy instruments have been detailed in this policy document to facilitate achievement of the policy targets:

- To develop high-end luxury resorts at prominent tourist destinations in the State.
- To attract and facilitate private investments and entrepreneurship in tourism sector in the State
- To position the State as a preferred tourism destination nationally and globally.
- To create a conducive environment for co-creation of diverse tourism products and experi-

ences

- To foster skill development and build institutional capacity for skill development in tourism sector
- To provide best quality experience at all touch points to the tourists visiting the State G. To promote responsible tourism practices among all tourism stakeholders

#### Infrastructure Assessment:

The prominent tourist locations in the State have well developed infrastructure and have attained the threshold to be able to attract private investments. The upcoming and focus destinations need development of robust infrastructure to supplement the product development and promotion efforts.

#### 1. Infrastructure development in Hospitality Sector

Hospitality infrastructure is a well evolved ecosystem in the State. The Government run AP Tourism Development Corporation owns and operates hotels and resorts at multiple locations in the State. The government can further analyse the tourist footfall data to determine most popular and upcoming sites



for development hotel and resorts to further promote these area and convert them into major tourist hubs.

## 2. Connectivity to all major and upcoming tourist spots

Majority of the tourist locations in the State are well connected through a network of roadways and railways. However, certain locations – especially those in hills and forests – need better last mile connectivity. The transport ecosystem is also underdeveloped in certain locations. Public transportation ecosystem can be improved for major areas along with introduction of smart travel cards to promote ease for travelling as well as encourage visits to upcoming attractions.

## Basic Amenities at all tourist locations

Basic amenities like washrooms, changing rooms, drinking water, etc. shall be developed in those areas that are major tourist hotspots to promote tourist satisfaction. Amenity blocks can be created at each of these destinations with provisions for washrooms, changing rooms, air-conditioned lounges, cafeteria, etc. Other than these, Wayside Amenities on major State Highways and National Highways connecting tourist locations in the State can be developed.

## Product Development Initiative

The state is focused to develop themes based tourism products such as: Rural Tourism, Heritage Walks and Tours, Buddhist Tourism, Eco Tourism, Beach and Water based tourism, Adventure & Recreation Tourism, Religious Tourism, Cuisine Tourism, Wellness Tourism, MICE Tourism.

In an effort to boost tourism in

Andhra Pradesh, the state government has proposed a plan to develop premium tourism infrastructure on the Beach Corridor – Visakhapatnam – Bheemli – Bhogapuram Beach Road. The tourism infrastructure on the state's agenda will include world-class resorts, adventure tourism facilities, golf courses, seaplane terminals, and more. The Tunnel Aquarium project at Thotlakonda Beach is also being prepared on the PPP model at an estimated cost of Rs 163 crore under the Tourism Policy 2020-25. The department is looking to convert a stranded Bangladeshi cargo ship on the Visakhapatnam coast, MV MAA, into a floating restaurant with a banquet and other facilities.

## Ease of Doing Business:

Andhra Pradesh has always been at the forefront of economic growth in India. Andhra Pradesh is currently ranked No.1 in the DIPP ranking on Ease of Doing Business (EODB) among States in India. With visionary leadership at the helm, Andhra Pradesh aspires to be the most sought after investment destination in India. Andhra Pradesh has taken various steps to promote ease of doing business like:

- The Single Desk Portal has been integrated with online applications of APIIC, Factories, Fire, etc. This will enable information sharing and minimize the duplicity of information shared by investors.
- Industry services related to Registration under Legal Metrology, Licenses for setting up of drug retail/wholesale, Permission for tree-cutting & transportation from Forests, Road cutting permissions, Building Permits, Trade licenses, Factory Plan approval, Fire No-objection certificates have

been made completely online

- The documentation requirement for availing various services has been reduced considerably. In many cases no more than two documents are required along with application.

## Marketing

The government should focus on marketing and promotion of the state as a tourism hub by using tools like:

- Digital Marketing: The state should utilize its repository of digital assets such as photos, creatives, short clips, how to videos, 360 tours, etc. to develop customised digital marketing and media campaigns across multiple platforms.
- Brand Campaigns: The state should promote iconic tourist places destination by conducting mass media and on-ground campaigns at key places.
- Strategic Partnership

## Community Engagement & Skill Development

Skills and service are key factors that will drive superior tourist experience in Andhra Pradesh. To ensure sustainable growth of the tourist sector, presence of a skilled and experienced workforce is essential. It is pertinent to undertake initiatives to cater to the demand for skilled manpower in the tourism sector and raise awareness of tourism and importance of good customer service in local communities. To generate the adequate quantity and quality of manpower for the industry as also to up-skill the existing workforce employed in the State Tourism sector, the capacity of the education & skill development infrastructure in the State must be increased.



## Uttarakhand

### Tourism Potential of the State with some major key attractions

**Uttarakhand, ranks 12th for tourism in India, essentially represents a significant window to improve the ranking. It also indicates that there is the likelihood to cultivate well-planned and managed tourism, in which environmental factors and socio-cultural aspects can be well integrated.**

The tourism sector is accepted as a growth driver for inclusive social economic progress through its forward and backward linkages and the ability to create employment in the economy. The state is considering development of spiritual and religious theme-based circuits for tourism. Under the Swadesh Darshan scheme of the central government, Uttarakhand is a site for eco-tourism. Other themes may involve treks/hikes/tours to view famous Himalayan peaks or treks along the course of the Ganga river, places of culinary interest, or villages where communities maintain traditional lifestyles that tourists may find interesting.

The advent of modern mass tourism necessitates a more inclusive engagement of social and economic factors. Under the headings of economic, sociocultural, and environmental impacts, it considers a number of tourism effects. While it is normal to classify these impacts in any given situation into a variety of categories, the impacts are most likely to be multi-faceted and not that easily separable.

The fact that tourism impacts are multi-faceted means that they must be carefully engineered, prepared for, and controlled. In tourism planning and management, a variety of different organisations, associations, and individuals play an important role. These main players include visitors, members of the host community, business professionals, government departments, and, to some degree, media & voluntary organizations.

### STATE GOVERNMENT INITIATIVES

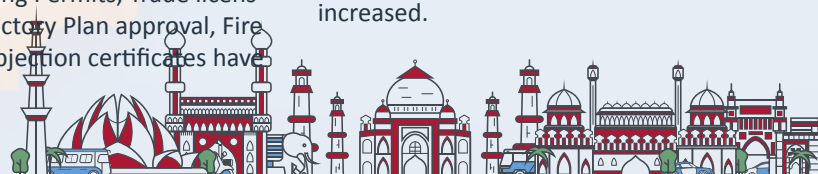
#### Policy Initiatives:

Following policy initiative have been undertaken by the Uttarakhand Government to promote tourism in the state:

- To establish Uttarakhand as a “safe tourist destination”
- To create and develop new tourism destinations and

unique tourism products to offer unmatched experience catering to various tourist segments.

- To ensure necessary basic amenities at all tourist destinations like- Parking, Toilets, Signage at strategic locations, ATMs, dispensaries, ticketing counters, internet and telecom facilities etc.
- To promote Uttarakhand State as a wellness hub and promoting medical tourism based packages
- To promote and develop Uttarakhand as winter tourism and Alpine Tourism destination which will solve the short tourist season of the state. These destination will be specially promoted after Char Dham Yatra
- Promote inclusive tourism strategies through community based tourism ensuring equitable distribution of benefits to the local communities.
- Making disaster resilient tourism infrastructure and establish SOPs to reduce adverse effects of disaster in tourists.
- To promote balanced regional development through Hub and Spoke model and to resolve the carrying capacity issues of prominent tourists destination.
- To promote and support entre-





preneurship through tourism incubator, startup and skills center.

### Infrastructure Assessment

Uttarakhand has a robust social and industrial infrastructure, virtual connectivity with over 39,000 km of road network, two domestic airports, 345.23 km of rail routes. As of April 2021, the state had total installed power generation capacity of 3,731.34 MW. Of this, hydro (renewable) power contributed 1,975.89 MW, followed by thermal power at 1,011.26 MW and renewable sources at 712.95 MW. With the establishment of the Software Technology Parks of India (STPI) earth station at Dehradun, Uttarakhand now offers high-speed connectivity. Information Technology is an enabling sector that provides underpinning of smooth connectivity throughout the state in various departments, businesses, and homes, thereby improving productivity and efficiency across sectors.

### Product Development Initiative

Uttarakhand is the most suitable place for water sports and adventure activities in the country. Activities such as Trekking, Rock Climbing, Paragliding, Scuba Diving, Para Motor, All-Terrain Bike, Kayaking, Canoeing, Skiing, etc can be developed further to promote tourism.

Few of the identified tourism products that can be developed to diversify the tourism opportunities are as follow:

- Wellness and Health
- Eco Tourism and Wildlife Tour-

- Adventure Tourism
- Film Tourism
- Golf Tourism
- Health, Rejuvenation and Medical Tourism
- Ropeways

### Ease of Doing Business

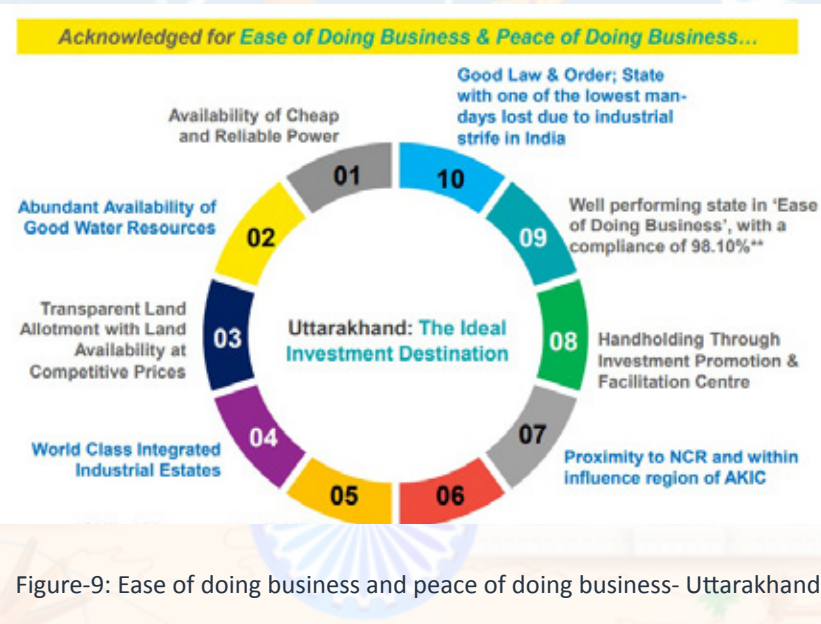


Figure-9: Ease of doing business and peace of doing business- Uttarakhand

Uttarakhand Government has embarked on reforms aimed at improving the business environment. Uttarakhand tourism development board has undertaken various steps to improve ease of doing business in the tourism sector in Uttarakhand for private investors/developers. Currently Uttarakhand ranks 11th across all states in India for Ease of Doing Business.

The state government has undertaken various reforms in the following area:

- Access to Information and Transparency Enablers: The

state has done a comprehensive compilation of 329 investors related services across 55 departments on its single window portal. Further the government has also introduced a help line to address the investor related queries.

- Availability of land: List of land banks with area infrastructure and distance is given on GIS based portal where GIS data is integrated with Google maps, and is available on SIIDCUL GIS System. The first-come-first serve principle is followed for land allotment and procedure needs to be completed within 30 days of application

- Construction Permit Enablers: The government has introduced comprehensive formal building bye laws. An automatic building plan Approval

Management System has been established by the government to facilitate quick processing, standardization, effective monitoring and disposal of building plans permissions

- Single window: The single window clearance system provides all the requisite clearances/licenses/permit etc. required to establish/operate tourism units.

### Marketing

- Aggressive Branding and Marketing exercises shall be undertaken by the Department and State will launch its new marketing campaigns to boost tourist inflow and better outreach.
- UTBD shall appoint reputed marketing and branding consultants/agencies/firms for promoting tourism.

Presence of State Tourism in international and national tourism events/marts, roadshows, expo's etc. shall be ensured.

- To provide information to tourists, tourism information Centers shall be established at prominent tourism spots.
- State's image shall be improved through strategic advertising campaigns through print, electronics and outdoor media.

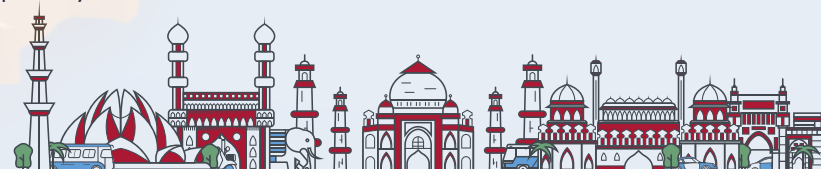
### Community Engagement & Skill Development

Uttarakhand has taken various initiatives to promote skill development and community engagement in the tourism sector such as-

- Conducting capacity building training programs jointly with Uttarakhand Skill Development Mission to cater the needs of

various tourism service providers like drivers, cooks, guides, cleaners, front office executives etc.

- All efforts shall be made to develop skills required for the tourism sectors with the help of apex institutes like IITTM, IIFM, Culinary Inst. Noida, IHMs, NSDC etc.
- Uttarakhand Skill Development Board shall periodically identify youth, operators, students, entrepreneurs to provide capacity building and trainings in the hospitality sector.
- Convergence with central government schemes like Hunar se Rozgar Yojna of Ministry of Tourism.





## Infrastructural Development with Emerging Tourism Themes



### Eco Tourism

According to the International Ecotourism Society, ecotourism is “responsible travel to natural areas that conserves the environment and improves the well-being of local people.” By limiting the number of visitors, hotels and other tourist infrastructure, ecotourism minimizes human impact on the environment and builds environmental and cultural awareness and respect.

Ministry of Tourism has recognized the immense potential of sustainable tourism in becoming a source of sustainable livelihoods in a high population scenario, and has given a special focus on promoting ‘Incredible India’ brand to attract tourists, not only to major cities and heritage attractions, but also to rural India where through correctly aligned policy mechanisms, the problems of disguised unemployment in agriculture as well as migration to urban areas can be mitigated through community based tourism models mentored by the industry.

With the institutionalization of Global Sustainable Tourism Council in 2010, the Ministry undertook to adapt the GSTC criteria for sustainable tourism in the Indian context, specifically taking cognizance of India’s attainments in sustainability, while also considering criteria generated by other sources, including GSTC. In this global backdrop, sustainable tourism and its various branches were integrated proactively into the policy framework in the 12th Five Year Plan.

The Ministry has also prescribed that the architecture of the hotel buildings in hilly and ecologically fragile areas should be sustainable

and energy efficient and as far as possible be in conformity with the local ethos and make use of local designs and material.

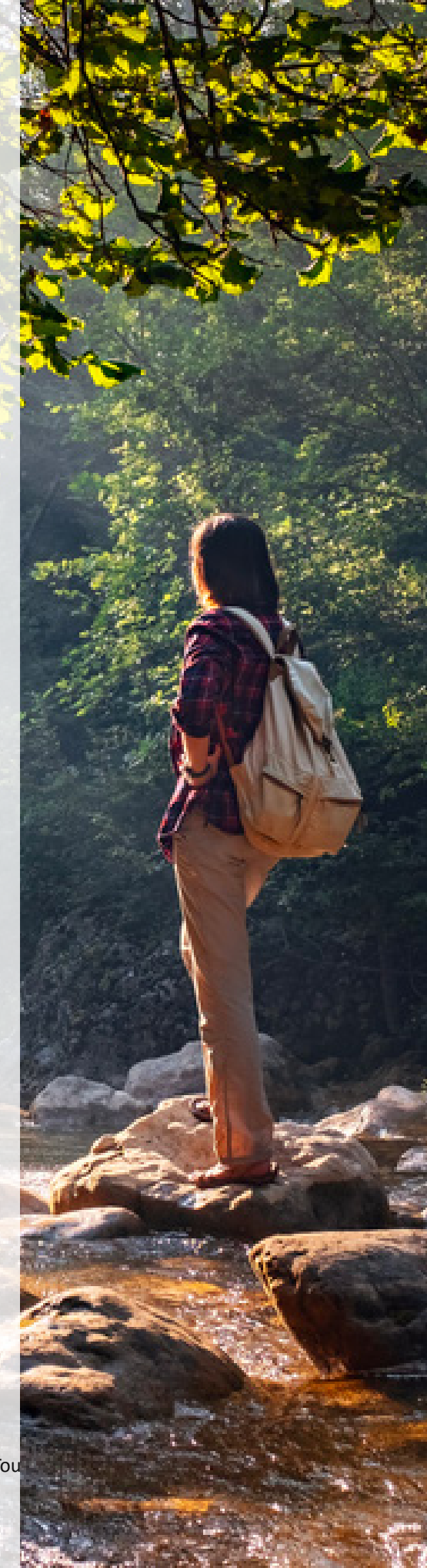
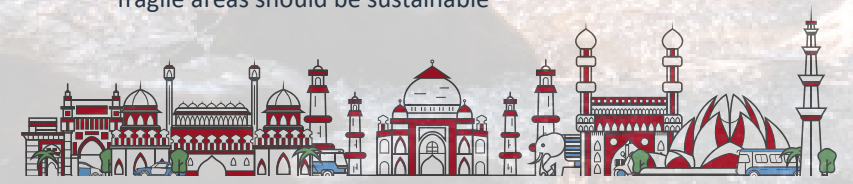
The government has prepared **National Strategy and Roadmap for Sustainable tourism** with focus on adventure and ecotourism has been prepared to mainstream sustainability in Indian tourism sector. The focus areas of the same are :

- Setting Sustainable Tourism Criteria of India (STCI)
- Finalization of Scheme for Certification as per STCI
- Certification for Adventure Tourism and Ecotourism
- Digitalization and branding of Certification Schemes
- Triggering State Support for Implementation of the Scheme
- Standardization of Safety standards and Regulatory System for Adventure tourism
- State Assessment and Ranking for Eco tourism and adventure tourism
- Improving India’s Rank in Eco-tourism and adventure ranking

### Ecotourism Development

Ecotourism may be developed in wildlife conservation areas designated as Protected Areas – Wildlife Sanctuaries, National Parks, Conservation Reserves and Community Reserves – and in areas outside designated protected Areas, which may include, forests, mangroves, Sacred Groves, mud flats, wetlands, rivers, etc.

Different types of ecotourism projects



- Ecotourism
- Community Development
- Eco Treks
- Eco-tourism parks

### Ecotourism in India

India has significant geographical advantage owing to its rich natural & eco-tourism resources:

- Himalayas, Vindhya, Western ghats, Eastern Ghats
- 7,000 kms of coastline
- Ranks 10th in total area under forest cover
- Among the one of the three countries in the world with both hot and cold deserts
- Ranks 6th in terms of number of recognized UNESCO Natural Heritage sites

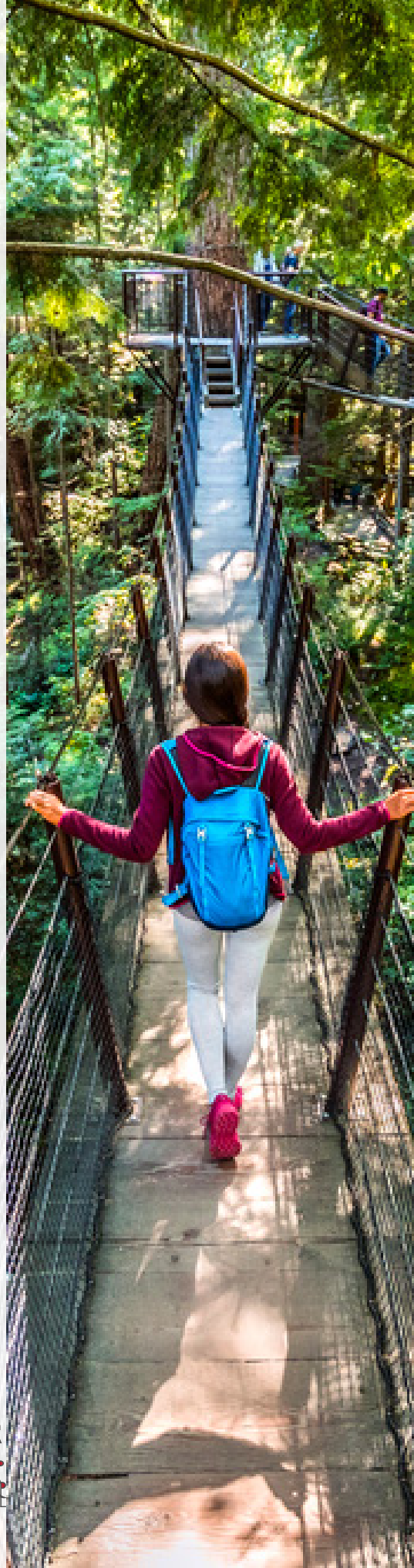
Covid-19 and lockdown have had a catastrophic impact on the country's tourism sector. While the world is on its way adapting to a new normal, there's still uncertainty regarding international travel; however, the search volumes for domestic travel indicate an appetite for going on vacations. After months of lockdown, people want to be amid greenery and nature to get some fresh air and enjoy good weather. Several niche offerings such as medical tourism, ecotourism and domestic leisure, wherein people can travel in their own cars to remote untouched areas, are expected to fuel demand.

Covid-19 has had a massive impact on the mode of transport opted by tourists. They are more interested in responsible and sustainable travel. Current travel trend shows that the classic road trip is ready to make a comeback, as most tourists are looking for nearby offbeat destinations, away from the crowd

and close to nature, which can be comfortably reached by car rather than travel by flight or train.

### Some major government initiatives to boost tourism and ecotourism are as follows:

- In October 2020, Prime Minister Mr. Narendra Modi inaugurated four new tourist attractions in Gujarat—Arogya Van, Ekta Mall, Children's Nutrition Park and Sardar Patel Zoological Park/Jungle Safari (near the Statue of Unity at Kevadiya in Narmada district).
- The initiative is part of the 17 new planned projects. Additionally, the government will also launch a seaplane service from Ahmedabad to the Statue of Unity, lending a major push to India's tourism.
- The Ministry of Tourism developed an initiative called SAATHI (System for Assessment, Awareness & Training for Hospitality Industry) by partnering with the Quality Council of India (QCI) in October 2020. The initiative will effectively implement Covid-19 guidelines/SOPs for safe operations of hotels, restaurants, B&Bs and other units.
- The Ministry of Tourism launched the Dekho Apna Desh webinar series to educate viewers on various destinations and showcase the sheer depth and expanse of the Indian culture and heritage.
- The Prime Minister has urged people to visit 15 domestic tourist destinations by 2022.
- The government is working to gain 1% of the global international tourist arrivals pie by 2020 and 2% by 2025.



The government has designated ecotourism as a 'thrust industry' in states such as Jammu & Kashmir, Sikkim, Himachal Pradesh and Uttarakhand. A range of incentives are available for ecotourism projects such as hotels, resorts, spas, entertainment/amusement parks and ropeways.

### Projects Initiated for Ecotourism Development in India

- Development of Horsely Hill in the Chittoor district of Andhra Pradesh has been sanctioned.
- Development of Satkosi in Orissa (Rs. 4.25 crore) has been approved. The following are proposed under the project: building an interpretation centre; landscaping; elephant camps; trekking park; watch towers; parking facility; etc.

- The Ministry of Tourism (MOT) has sanctioned Rs. 2.63 crore for an ecotourism project in Morni-Pinjore Hills and Sultanpur National Park in Haryana.
- The project on integrated development of tribal circuit, with focus on ecotourism in Himachal Pradesh, has been approved for Rs. 6.98 crore.
- Expansion of Wayanad in Kerala for Rs. 2.01 crore.
- Development of Tourist Circuit (Western Assam Circuit) Dhubari Mahamaya-Barpeta-Hajo has been sanctioned for Rs. 4.97 crore.
- Expansion of Mechuka destination (Rs. 4.41 crore in Arunachal Pradesh).
- Development of tourist destination in Khensa for Rs. 4.58 crore in Nagaland Circuit Udhyaman-dalam-Madumalai-Anaimalai,

- Tamil Nadu.
- Jungle Lodges and Resorts, Karnataka (provides experience of living in the wilderness).
- Private initiative in Kerala-Casino Group of Hotels, Tours India Ltd. (adopted 2 tribal villages in Periyar Tiger Reserve for growing indigenous pepper to help local communities realise financial gains).
- GEF Project-Gulf of Mannar, Tamilnadu (ecotourism as an alternative method of livelihood and preservation of biodiversity in the region).
- Sikkim Biodiversity and Ecotourism Project (developing collaboration between TAAS, local orgs., and communities for biodiversity, conservation, and income generation).
- Periyar Tiger Reserve, Kerala-India Ecodevelopment Proj-





## Coastal Tourism

Coastal areas are transitional areas between the land and sea characterized by a very high biodiversity and they include some of the richest and most fragile ecosystems on earth, like mangroves and coral reefs. At the same time, coasts are under very high population pressure due to rapid urbanization processes. More than half of today's world population live in coastal areas (within 60 km from the sea) and this number is on the rise. Globally coastal tourism is one of the most prominent avenue. In India with 7000 km long coastline, Coastal tourism has immense potential. Already Goa, Kerala, Karnataka, Andamans have well established coastal tourism.



### Development in coastal tourism

In order to boost tourism in these areas the government should have proper planning and development strategies. The main focus should be on developing the infrastructure. These include road and rail networks, sanitation and sewer disposal system, storm water drainage systems, slum improvement and housing repairs and retrofitting programmes. The de-

pendent lifelines of Mumbai which include water supply, electric supply, telecom services, fuel, health, food supply etc, depend very much upon the effective functioning of these infrastructural facilities. The coastal tourism needs to maintain below infrastructure at beaches/coasts

- Power stations/Electrical installations (receiving station)
- Transport infrastructure The requirements of projected

passenger traffic rise in vehicular density, and the increase in number of vehicles, both private and public, will put tremendous pressure on the existing transport infrastructure and road network. For reduction of road accidents, reducing disruptions resulting from floods and increasing the response time of the emergency services, a comprehensive mitigation strategy to improve the transport infrastructure becomes imperative.



- Sanitation facilities

Following types of attractions are required to be installed at prominent beaches:

- Beach shacks
- Exclusively beach hotels cum resort
- Tempting cuisines from all over the world (specializing in sea food)
- Spas
- Aquatic wild life attraction
- Health therapies and massages
- Water sports
- Most happening discos & clubs
- Gyms
- Beauty saloons
- Beautiful landscapes and gardens with laser shows
- Private transport facilities
- Attractive packages

### Quality certifications of Beaches

#### Blue flag beaches

Blue Flag beaches are considered the cleanest beaches of the world. The Blue Flag is one of the world's most recognised voluntary eco-labels awarded to beaches, marinas, and sustainable boating tourism operators. There are around 33 criteria that are to be met to qualify for a Blue Flag certification.

#### BEAMS

On the lines of Blue Flag certification, India has also launched its own eco-label BEAMS (Beach Environment & Aesthetics Management Services). Beach Environment & Aesthetics Management Services that comes under ICZM (Integrated Coastal Zone Management) project. This was launched by the Society of Integrated Coastal Management

(SICOM) and the Union Ministry of Environment, Forest and Climate Change (MoEFCC).

The objectives of BEAMS program is to:

- Abate pollution in coastal waters,
- Promote sustainable development of beach facilities,
- Protect & conserve coastal ecosystems & natural resources,
- Strive and maintain high standards of cleanliness,
- Hygiene & safety for beachgoers in accordance with coastal environment & regulations.

There are eight beaches in India which have received Blue Flag Certification:

- Shivrajpur in Gujarat,
- Ghoghla in Daman & Diu,
- Kasarkod in Karnataka and,
- Padubidri beach in Karnataka,
- Kappad in Kerala,
- Rushikonda in Andhra Pradesh,
- Golden beach of Odisha,
- Radhanagar beach in Andaman and Nicobar.

### Wellness Tourism & Medical Tourism

Wellness Tourism: The country is giving lot of emphasis to health wellness and Indian System of medi-

cine. The government has allocated budget of 2970 crore rupee for 2021-22 for Ayush Ministry. The Ministry of Ayush has vision of reviving the profound knowledge of our ancient systems of medicine and ensuring the optimal development and propagation of the Ayush systems of healthcare. Many domestic tourists travel to avail the wellness and spa benefits from the established wellness tourism hubs.

#### Ayush sector 2021 status

3986 Ayush centres  
13 Lakh Ayush Practitioners  
8954 Ayush Drug manufacturing units

The Department of Ayurveda, Yoga, and Naturopathy, Unani, Siddha and Homoeopathy (Ayush) focused attention towards education and research in Ayurveda, Yoga and Naturopathy, Unani, Siddha, and Homoeopathy. There are various centrally sponsored schemes and grants under this Ministry for states to develop Ayush in public health space.



Figure-19: Blue Flag Beaches of India



## Medical Tourism

In 2019 close to 6% foreign tourist arrivals were for medical tourism. In 2017 most of the medical tourist came from Southeast Asia, Middle East and Africa and SAARC region. India ranks 10th out of 46 Medical Tourism destination ranked by Medical tourism index in 2020-21. With the advancement in infrastructure and evolving modern economy India is opening huge potential for medical tourism.

India is attaining advantage for growth of medical tourism because of following factors:

- Availability of world class doctors and hospitals
- The cost of the treatment is a fraction of cost in the source markets
- Very low or no waiting period for various medical processes
- Increasing popularity of India as a tourist destination in the west
- Eastern Healthcare Wisdom along with the expertise of Western Medicine.
- English Speaking health care workers

The Ministry of Tourism has taken several steps to promote India as a Medical and Health Tourism Destination, which are as follows:

- The Confederation of Indian Industry, on advice by Government, has prepared a guide on select Indian hospitals of the country for health tourism purpose. It has been placed on the Website of the Ministry of Tourism for wider publicity.
- Indian Healthcare Federation, a Non-Governmental organisation affiliated to Medical and health tourism has been specifically promoted at various international platforms such as World Travel Mart, London, ITP Berlin. Similarly, Website on

tourism have been produced by the Ministry of Tourism and have been widely circulated for publicity in target markets.

- A new category of 'Medical Visa' has been introduced, which can be given for specific purpose to foreign tourist coming to India for medical treatment. The government of India issues medical visa to every medical tourist and this visa can also be extended for over a year. This extended time of visa enable the patients to visit three times in a year and these patients can also be accompanied by a relative or friend at the time of medical tour to India.
- Guidelines for accreditation of Ayurvedic and Panchkarma Centres have been circulated to all State Governments for implementation. These have been placed on the website of Ministry of Tourism for wider publicity.
- Yoga/Ayurveda/Wellness has been promoted over the last two years in the print, electronic, internet and outdoor medium under the Ministry of Tourism's "Incredible India Campaign".
- Brochures & CDs on Body, Mind and Soul covering the traditional system of medicine have been produced and circulated extensively by the Ministry of Tourism.
- Market Development Assistance (MDA) Scheme in the Sector: The Ministry of Tourism has included the promotion of Medical Tourism as new initiatives. The Marketing Development Assistance Scheme (MDA), administered by the Ministry of Tourism, Government of India, provides financial support to approved tourism service providers.



## Film Tourism

According to a report published by EY and PHD Chamber of Commerce and Industry in 2019, film tourism has a scope to generate USD3 billion by 2022 in India as there is potential for up to 1 million film tourists to visit different parts of the country by 2022. Almost all states have issued guidelines for shooting of films in the state

India has list of Film Cities which are providing production of majority of films in India and they are visited by tourist for site seeing also.

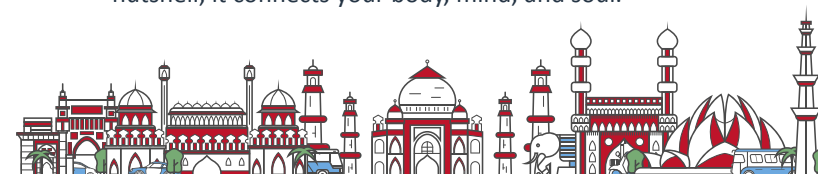
### List of major film cities in India

SNo.	Name	Description
1	Ramoji Film City, Hyderabad	Integrated film city spread over 1666 acres of land.
2	Mumbai Film City, Mumbai	It is an integrated film studio complex situated near Sanjay Gandhi National Park and is also known as Dadasaheb Phalke Chitra Nagari.
3	Innovative Film City, Bengaluru	It is located on the outskirts of the city of Bengaluru. It has several shooting locations such as Cartoon City, Aqua Kingdom, Dino Park, Mini Golf, Petting Zoo, Haunted Mansion, Innovative Talkies and Mirror Maze. The film city also has a number of museums like Fossil Museum, Wax Museum, Tribal Museum and Oddities Museum.
4	Noida Film City, Noida	Noida Film City has AAFT and Marwah Films & Video Studios along with India's prominent news channels. It is located in Sector 16-A Noida, India and spread across 100 acres of land

Table-11: List of major film cities in India

## Spiritual Tourism

With a growing number of tourists globally, there is an increased emphasis on spiritual tourism than ever before. Spiritual tourism is to travel to find purpose and meaning to life. It elevates physical, mental, and emotional energies. It develops, maintains, and improves body, mind, and spirit. In a nutshell, it connects your body, mind, and soul.



To enhance the spiritual tourism in India, the government has taken following measures

21 June : International Yoga Day: Yoga is at the centre of Spiritual tourism in India. Many foreign and domestic tourists visit Spiritual cities like Rishikesh and Haridwar for experiencing Yoga.

Ayurveda: Ministry of Ayush, Government of India is promoting structural development of Ayush in the whole country.

## Heritage Tourism

The plurality and multiplicity of the Indian Culture is evident to the whole World as India has one of the world's largest collections of songs, music, dance, theatre, folk traditions, performing arts, rites and rituals, languages, dialects, paintings and writings that are known, as the 'Intangible Cultural Heritage' (ICH) of humanity. Thus, on this premise was born the philosophy and the concept of having academies of national importance. India has very rich heritage and is home to 38 World Heritage Sites. Heritage tourism is one of the premium tourism sectors. Many heritage tourism site have been used for Film tourism industry in India.

Heritage Tourism requires following activities:

- Restoration and maintenance of Heritage sites
- Development of connecting roads connecting to potential heritage sites
- Involvement of scholars, Historian, Anthropologists in structuring the story of the heritage sites
- Public utilities for visitors like last mile connectivity, stay, safety, tourist engagement in the heritage sites
- Integration of AI based visualisation for enhancing tourist experience

## Sports Tourism

Sports tourism refers to travel made either for viewing sport event or participating and in sports event. Formation of multiple sports leagues coupled with sports infrastructure strengthening and great performance of sports persons have accelerated the sports tourism in India.

Famous Indian Sports Leagues



Figure-20: Famous Indian Sports Leagues

## Agro Tourism

Agritourism can be defined as a form of commercial enterprise that links agricultural production and/or processing with tourism in order to attract visitors onto a farm, ranch, or other agricultural business for the purposes of entertaining and/or educating the visitors and generating income for the farm, ranch, or business owner.

It is more meaningful form of Eco tourism and connecting with nature. Many states in India are home to fruits and vegetable clusters. Agritourism can be organised around these agri clusters present in different state.

- Apple cluster of Himachal and Jammu Kashmir
- Rhododendron, Mandarin and Litchi cluster of Uttarakhand
- Mango cluster of UP
- Grapes, Orange, strawberries and Mango cluster of Maharashtra
- Mango cluster of Gujarat
- Pineapple cluster of North East

## Rural and Tribal Tourism

### Rural Tourism

One of the latest trends in tourism sector is Rural Tourism. The tourist experiences wide range of products and services in non-urban areas. It is one the means to improve the income in rural households. During covid19 pandemic many corporate workers preferred working from home and working from villages having good internet connectivity, popularly known as Staycation. Every state has issued guidelines for homestays both for owners and for tourists also.

### Tribal Tourism

Tribal tourism is the thriving on showcasing the unique tribal culture, traditions, arts and cuisine to the non-tribal population. Tribal population have very limited exposure to the outer world and tribal culture is one of the most sustainable practices of culture existing today. A journey to tribal areas not only enhances local income but also improves exposure of communities. The tribal tourism needs to be aligned with below policies and department:

- Forest Rights Acts 2006
- State department of Forest
- Tribal welfare departments
- Ministry of Tribal Affairs
- Trifed : Tribal Cooperative Marketing Development Federation of India Limited

## MICE

Meeting Incentives Conference and Exhibitions (MICE) centres are multipurpose , multi utility tourism centres that promote business tourism (Business travellers). The main purpose of MICE events is to create a networking platform for business, industry, government and Academic Community and engage in meaningful conversations. Generally, they bring large groups together for a specific purpose. MICE is also known as 'Meetings industry' or 'Events industry'. MICE is a sub-segment of business travel, but it can also involve a leisure component.

As per ICCA Country and City Rankings 2019, USA remained as number 1 country with 934 meetings out of total 13,254 meetings. India with 158 meetings was at 28th rank as per 2019 International Congress and Convention Association (ICCA) rankings.



**Following are the industries that contribute to the growth of global MICE events:**

- Government and Development agencies such UN, WHO etc.
- Environment & other SDG Goals
- Food security
- Healthcare & Medical
- Information Technology (AI, Big Data, Cloud, IoT)
- Engineering & Modern Manufacturing (4.0. etc.)
- Urban Mobility & Transportation
- Cyber security & Homeland security
- Defence
- Textiles & Fabrics
- Energy, Power & Electricity
- Chemicals, Plastics & Rubber
- Engineering & Electronics
- Travel & Tourism

STEM subjects remain most popular meeting topics. Medical Science (17%), Technology (15%) and Science (13%) are the three most popular international association meeting topics, which is unsurprising as global society embraces technology.

Indian MICE has less than 1% share in the estimated global MICE business despite the natural & cultural advantages of India and being one of the highest growing economies. India has great potential to improve MICE tourism as reflected by rankings of ICAA:

- 75th Rank – New Delhi (37)
- 159th Rank – Hyderabad (19)
- 203th Rank – Bengaluru(14)
- 203th Rank – Mumbai(14)

**MICE infrastructure**

MICE Infrastructure broadly covers Hotels, Resorts, Exhibitions and Convention Centres, which play an important role in promoting a city/region as MICE destination. Currently Infrastructure status has been accorded to the construction of 3 star and above Hotels located outside the cities with population of one million and above. Ministry of Tourism will pursue to expand the list of cities for grant of infrastructure to MICE infrastructure projects such as Hotels and Resorts, Exhibition and Convention Centres etc. Granting Industry status to MICE will help them to get the required Fiscal incentives and allotment of land parcels. The States can make suitable land available under Public Private Partnership to the Private Sector for setting up and operating the MICE facilities. The States may encourage long term lease of land or revenue sharing model, which doesn't require heavy upfront payment, which often makes PPP model a non-starter.

**Caravan Tourism**

The Caravan tourism is another form of luxury-cum-adventure travel. The Luxury Caravans are equipped like a mini apartment with designated and fully furnished lounge-cum-bedroom, kitchenette, and restroom. For running caravan tourism successfully there is requirement of camping sites that are safe, routes are equipped with roadside amenities, restroom waste disposal areas, fuel stations and collaboration with highway restaurants and facilities.





## Way Forward: Unleashing Investment Potential of Tourism Infrastructure Development in India through achieving Sustainable Tourism Development



- Tourism is a key sector for economic development: it is a fast-growing and labour-intensive industry that involves many economic activities. Investment promotion agencies (IPAs) can play an important role in the development of a country's tourism industry as growing international competition between tourism destinations and higher contestability of foreign direct investment (FDI) projects make effective promotion crucial to attract investors in the sector.
- Tourist destinations do not only aim to attract financial capital from abroad, but also human capital, such as entrepreneurs, hospitality and travel managers, and international franchisees to market and develop local attractions. Tourism includes a wide range of activities, such as transportation, accommodation and catering, tour operation and travel agency businesses, tour guiding, the sale of souvenirs, and financial services. A successful tourist destination may also attract other industries that recognize the benefits to be gained from a large inflow of consumers. The institutional design of tourism planning should facilitate the participation of diverse groups and interests within the community. This will not only discourage undemocratic, top-down decision-making, but will also provide opportunities for communities to use their own resources and creativity to find appropriate methods for tourism development.
- Despite the setback due to the

COVID-19 pandemic, India's travel and tourism industry has huge growth potential for the upcoming years. Though the infrastructure is still a constraint, it sustains current growth. The Government should invest in infrastructure like transport, accommodation, better roads, health and hygiene as well as new technologies like CRM tools and state of the art security to meet the growth potential of this industry.

- The strong growth in this industry stems from the middle-class population of India and high spending foreign tourists as well as coordinated government campaigns to promote 'Incredible India'.
  - There are number of initiatives being taken in this direction but at the same time concerted efforts need to be made to accelerate the growth of the sector. There is an abundance and variety of tourist attractions in our diversified nation. Indeed, time is now right to identify, package and market newer destinations, experiences thereby ensuring adequacy of carrying capacity and exponential growth in tourism.
- Developing an investment promotion strategy for a shared vision of tourism development is essential for reviving tourism Post Covid 19.**
- The growth in international tourism and the increasing competition between destinations require policies and strategies to highlight and strengthen a country's comparative advantages. Regional

cooperation can include joint tourism-marketing activities, harmonizing trade and investment policies, information-exchange, joint management of tourist assets, and provisions enabling tourists to move freely between countries.

**The focus of Nangia Andersen LLP (NAL) is to recommend States and adopt seven key steps in order to position their agencies and locations more competitively for new tourism investment:**

- Develop more strategic, focused, and relevant approaches for tourism investmentpromotions.
- Improve overall capacity and skills to deliver effective investment promotion with an emphasis on developing better tourism-specific knowledge in-house, especially regarding the market and the product.
- Present tourism information succinctly, using up-to-date facts and data as well as testimonials from successful tourism companies.
- Disseminate information to investors more effectively through a mixture of existing and customized instruments (such as websites, detailed sector profiles, and tailored presentations).
- Leverage partnerships to maximize results
- Promote MICE tourism across states as it makes up a big part of global business travel since every industry has regular





events of some kind. This can induce a spurt of growth for the state in terms of revenue as well as employment generation.

- Involve journalists as well as tourism critic to effectively improve the state's image as tourist place which will subsequently lead to increased tourist arrivals. The state can also leverage the use of social media as well as participate in events such as road shows to highlight the experience that the state offers.

**A few steps that can be taken to support the growth potential of the Tourism Sector are:**

- **Revive and develop declining urban infrastructure:** Addressing the major and multi-faceted challenges faced by the tourism industry demands an integrated approach to policy development across many Central Ministries and State Government departments. Coherence and consistency are essential in the design and application of policies between all levels of government to ensure that tourism policies are effective.
- Promoting more Wayside Schemes for Wayside Amenities development and Promoting Health, Sanitation and Safety by promoting amenities like Public Conveniences or Toilets, Solid Waste Management, First Aid Centres etc.
- **Organizing Capacity Building Workshops and Sensitization trainings:** The specialized

capacity-building sessions will focus on frameworks and practical digital tools to improve your competitiveness in regards the attraction and promotion of foreign direct investment (FDI) to your region and country as we recover from the COVID-19 pandemic.

- **Promotion of Wellness Industry:** The Indian wellness industry flourished by banking on the demand for alternative healing practices like the Ayurveda, yoga, naturopathy, etc., and then slowly expanded to include nutrition, fitness, preventive healthcare, and health tourism. The state can further expand this sector by reviving such wellness centres. The improving Indian economy has given the lower-and middle-class consumers to spend more on their health and well-being. And the Indian government's role in inviting key players to invest in wellness under the flagship "Make in India" scheme and its move to establish the Ministry of AYUSH is also indicative of boosting the health and wellness market in the country. During the next three years, it is estimated that the Indian wellness industry will grow at a CAGR of 20% to reach INR 875 bn. Consumers and their needs will continue to evolve, driving the transition from remedial care to a more holistic view on preventive care. This augurs well for the wellness industry in India.
- **Encouraging Pro-Poor Tourism:** The development objective of Pro-Poor Tourism Development

Project for India is to increase tourism-related benefits for local communities in targeted destinations. The project comprises of four components. The first component, destination planning and governance aims to test new approaches and establish the institutional structures, policies, and coordination mechanisms necessary for bringing together the public and private sectors and local communities for effective destination-level tourism planning and governance. The second component, tourist products development and management aims to enhance the tourist experience while simultaneously contributing to improving local living conditions and livelihood opportunities by transforming existing tourist attractions into tourist products that incorporate local communities both physically and economically. The third component, support to local economic development aims to improve the linkages of those involved in the productive and creative economies with the tourism value chain



in the project target areas by providing advisory, technical assistance, and financing. The fourth component, project management aims to provide the necessary technical, advisory, and financial support for the adequate implementation, management, and coordination of the project using country system.

- **Investing on Caravan Tourism:** The concept of Caravan tourism has gained immense popularity across the globe owing to the freedom and flexibility it provides, while holidaying vis-à-vis itineraries and accommodation. Considering the immense land area and the multitude of landscapes in India, Caravans and Caravan Parks are sure to add an exciting new facet to tourism in Incredible India. The initial demand in this niche segment is expected to come from domestic tourists and then from the inbound tourists.
- **Policy Considerations on Tourism Investment:** Provides insights for policymaking based on data driven evidence collected from Members States alongside contributions from other key relevant partners. Efforts to ensure tourism is a driver of the Sustainable Development Goals (SDGs) has to be taken care off. A significant level of investment will be required to support increasing traveller volumes and changing consumer behaviours and needs. This might present several investment opportunities, opening up new investments flows from traditional hard investments

like accommodation infrastructure to soft infrastructure like digital solutions and support services around experiences and sustainability in a post COVID-19 reality.

- **Increasing the resource efficiency for Tourism:** Advancing sustainable consumption and production (SCP) patterns is essential if the sector is to contribute effectively to sustainable development. This will aim to inspire stakeholders and encourage them to advance the implementation of the SDGs through sustainable tourism by recommending five strategic approaches such as:
  - Using the SDGs as a guiding framework and prioritize SDG12 for multiplier effect.
  - Outline SCP policy instruments to pave the way towards implementation of policies.
  - Support the regular and timely measurement of SCP for effective implementation
  - Incorporate geospatial data to visualize the interactions of tourism with the environment.
  - Embrace other innovative approaches – circularity as an SCP enabler.
  - **Development of Tourism Research Wing:** Development of dedicated wing to analyze tourist data can prove to be quite substantial for understanding the trends and patterns of tourists which can help in planning for infrastructural development, identifying issues as well as forecasting tourists.

- **Leverage private-public partnerships (PPP) by encouraging participation:** Make an assessment of the various state-owned Tourism Units and identify the units which can be operated on suitable PPP models and hereby promoting the various target opportunities. In the right circumstances, public-private partnerships (PPPs) can allow governments to lead the development of tourism assets in accordance with government priorities and high environmental and social standards, while harnessing the efficiency and creativity of the private sector. In order to promote investment in Tourism and Hospitality Sector, it is suggested that 'Infrastructure' status for hotel projects provided as per current cost-based criteria of `200 Cr. may be amended to `20-25 Cr. to enable inclusion of 2-3 star hotel category of hotels. Hence, reducing the cost of borrowing for potential investors and encourage creation of required tourism infrastructure.
- **Conducting Environmental Assessment:** The assessment needs to be done for different States on various circuits, sectors, forests, water bodies etc. The assessment should be based on detailed ecological survey, providing details of flora and fauna. The analysis should specifically predict the effect of development on their existence and shall also propose possible mitigation strategies in order to help in their conservation. Overall environmental impact assessment of all the sectors to



be provided.

- Development of Standard Operating Procedures and Operation & Maintenance Plan for Tourism Core products like Tourist Facilitation Centre, Tourist Information Centre, Multipurpose Halls, Log Huts. / Log Huts/ Tents/ Craft Haat/ Souvenir Shops/ Rain shelter/ Gazebos etc.
- **Benchmarking the Identified Tourist Destinations & Improving Infrastructure and Connectivity to tourist destinations:** Improvement on existing infrastructures like Last mile connectivity, Terminals, Helipads, Convention Centres, Parking facilities etc. There is a need and focus for low-carbon mobility and create a low impact physical development for different regions of India.
- **Identification and Mapping of the tourism assets:** Identify and list of all Tourist destination/ sites and map all the proposed tourism circuits on using software's and computer simulation like CAD or GIS as relevant, with all layers superimposed as required.
- **Identifying the Carrying capacity of States for Infrastructural Development:** Carry out the demand supply analysis of the available infrastructure for tourists, both physical and social and identify gaps in the future infrastructure requirements based on the projected population and tourist inflow and assess the existing situation and tourism potential of the circuit.
- **Conducting proper Land Bank and Land Suitability Assessment for Promoting Investments:** Geo-technical assessment of Land suitability for construction and delineate all environmental sensitive areas and to provide a development suitability map of the tourism destinations. The land suitability assessment shall be based on the analysis of land use, and formations The output of land suitability assessment shall be GIS based map detailing all areas with low, medium and highly developmental suitability.
- **Implementing an institutional framework in order to manage rural tourism development in an efficient and sustainable way:** Encouraging skills development and training to improve service skills and creating employment. This will foster for creation and development of different products with varied tourism experiences associated with the potential of all selected destinations/ sites.
- **Increasing Travel Facilitation:** Travel facilitation of tourist travel which is closely inter-linked with tourism development can be a tool to foster increased demand and generate economic development, job creation and international understanding. This requires updated sectoral strategies as well as business opportunities to grow in the tourism sector. States may collaborate for core infrastructure development like Road, Railways and other Public Transportation across various identified integrated circuits. To promote ease of travel initiatives such as smart travel cards,



rail pass, tourist card etc can be introduced.

- **Promoting India as a 'Safe Tourist Destination':** States may undertake various initiatives like setting up surveillance cameras, tourist police, 24\*7 help lines, compulsory registration of tourist guides operators etc. to ensure safety of the tourists. These initiatives may be highlighted by the states/ Central Government in various promotional campaigns to project India as a safe and secure tourist destination.
- **Project Design Development for Destinations:** Successful interventions in tourism development will promote local products, improve livelihood of the traditional communities, create environmental awareness and nature appreciation. Hence project design and development of investment ready projects across all spectrums of tourism will be possible by adopting the state-of-the-art sustainable tourism practices.
- **Conceptualization Support –** From initial market research through financial feasibility analysis and assisting with the development of reformulated and enhanced business plans and prospectus documents to make investing opportunities as competitive as possible.
- **Creating Branding and Online Presence:** Development of conducive implementation framework in improving visibility and promotion of experiential offerings through these

niche aggregators should form one of the critical strategies for promoting tourism in the country.

- The positioning of a destination therefore involves categorizing the place in essence to the kind of experience it offers to the visitors - it is all unique and distinct for all the destinations. The destination image contains components that are holistic and based on attributes that help tourists identify them under segregated niches to plan accordingly. This not only makes it easier for the tourist to find the right kind of place for them but also the destination to create a unique image for itself that attracts all the relevant visitors.

#### ACHIEVING SUSTAINABLE DEVELOPMENT IN TOURISM

- Tourism appears to be largely recognized as a high-impact sector with potential to advance all SDGs. Moreover, tourism industry demonstrates that the sector has the potential to contribute to all 17 SDGs. SDGs 8, 12 and 17, on 'Decent Work and Economic Growth', 'Responsible Consumption and Production', and 'Partnerships for the Goals', respectively, appear as having the strongest link with tourism. Several countries use tourism to implement additional SDGs, or perceive the sector to be an important instrument to achieving these.
- Tourism is in a very special position to benefit local communities, economically and socially,

and to raise Awareness and support for conservation of the environment. Within the tourism sector, economic development and environmental protection should not be seen as opposing forces—they should be pursued hand in hand as aspirations that can and should be mutually reinforcing, and practices that commensurate with these values can provide long term benefits to the industry as well as the community.

- One of the most appealing aspects of tourism is the potential for local economic activity, particularly for women and young people - The industry employs more women and young people than the global workforce as a whole. While tourism cannot directly reduce poverty, it can nonetheless help, given the low skill requirements for entry-level jobs and the prospects it offers for small-scale entrepreneurs to pursue new activities or formalize existing micro ventures.





Figure-21: Sustainable Development Goals

The tourism value chain's multi-sectoral and complex character provides enormous opportunity for developing backward and forward connections that can engage local micro, small, and medium-sized businesses (MSMEs).

From an economic point of view, Indian tourism sector is a significant source of foreign exchange and jobs. India can take the advantage of its unmatched tourism potential by providing policy tools and mechanisms to channelize investments in the right direction.

With increased demand for mainstream and unconventional tourism products, numerous new destinations have emerged that are fiercely vying for more visitors, and many businesses within destinations are also competing. Tourism expansion

brings with it additional circumstances that might have a significant impact on a destination's competitive edge, such as traffic congestion, ecological quality, and socio-cultural fabric. The problem is to coordinate the magnitude, pace, and form of investments and advancements in such a way that they enhance rather than detract from competitive advantage.

Each aspect of sustainable tourism demands strong collaboration between the public, private, and community sectors. From an economic standpoint, recreational landscapes are common assets sustained by multifunctional ecosystems, which is why collaboration among various stakeholders is critical. The following areas can aid in the creation of a favourable environment for sustainable tourism models to grow

and achieve anticipated community benefits.

### 1. Promote Smart and Frugal Infrastructure

As we want sustainable tourist models to enhance rural communities, we should promote smart and frugal infrastructure. Communities, as well as the development of modern infrastructure, will be critical in drawing tourists to off-the-beaten-path destinations. Currently, the minimum project cost to qualify for infrastructure classification for tourism projects is INR 200 crore. is being considered for a reduction to INR 50 crore. However, if this access barrier can be further lowered, or if a new entry barrier can be created, Smaller projects might have their own incentive scheme, which would attract private investors to invest.



### 2. Technology and Digitalization:

The advancement of technology has given us clear insights and easy to use tools to advance sustainable and inclusive growth, and go far beyond cashless transactions and reservations. Small businesses can use data analytics to establish credit and gain insights into consumer purchasing patterns, which can help municipalities with crowd management and urban planning. Creating a cashless ecosystem for tourists, creating value added goods such as the Incredible India Travel Card, using GIS, and new technologies such as Artificial Intelligence (AI) are just a few examples of sectors where India has knowledge expertise and manpower advantage.

projects like community homestays, tour operators, RO-RO and boat operators.

### 5. Reduce GST on Room Tariffs:

Currently, hotel rooms attract a GST between 12-28%. Prior to GST, a service tax of 8% was levied. This has resulted in financial burden on small homestay owners, and hence needs to be rationalized.

### 3. Skill Development and Community Entrepreneurship:

While infrastructure is one part of the puzzle, training communities at the same time is the other essential aspect. This would involve a wide range of skills ranging from soft skills to technical aspects pertaining to sustainable utilization of resources, waste management, and business management skills including financial management, marketing and promotion.

### 4. Incentivize Private Sector Participation:

Government/(s) should incentivize private players to invest in unserved/ under-served tourism projects. The incentive pattern can be friendlier for attracting more innovative tourism projects vis-à-vis run-of-the-mill projects. For instance, interest subvention scheme can be introduced for small tourism







Nangia Andersen LLP

A member firm of **ANDERSEN GLOBAL**

