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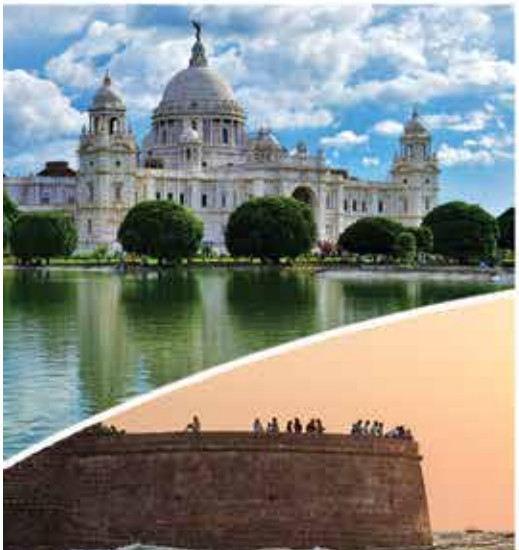
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INBOUND TOURISM

Decoding Strategies for Next Stage of Growth

— APRIL 2018 —

TITLE	**INBOUND TOURISM – Decoding Strategies for Next Stage of Growth**
YEAR	April, 2018
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FOREWORD

India's Tourism sector has bucked global economic headwinds to remain on a steady growth trajectory for over a decade. After the historic jump to the 40th position in the WEF Travel and Tourism Competitiveness Index 2017, India crossed the 10 million mark in Foreign Tourist Arrivals (FTA) for the first time in 2017. Latest reports by the World Travel & Tourism Council rank India's Travel & Tourism sector 7th in the world in terms of its total contribution to the country's GDP, generating USD 234.0 billion and 41.6 million jobs in 2017.

The Tourism sector has enormous potential to lead the socio-economic transformation of 'New India'. Primarily driven by remarkable natural beauty, rich cultural heritage and unique traditional values, the sector has witnessed exponential growth in niche sub sectors such as MICE, medical and wellness, adventure, sports, amongst others. India's price-competitive offerings, simplified e-Visa and immigration procedures and increasing disposable income will further contribute significantly towards boosting inbound tourism in India.

The Government has also taken several progressive measures towards focused development of the sector. The decision to develop 10 prominent sites as 'Iconic Destinations' is a commendable effort which will serve as pilot projects and a replicable model for other major tourism destinations. Further, impetus on strengthening infrastructure and rural development will have a multiplier impact on Tourism. Capital intensive infra projects, like ropeways, will provide a boost to the tourism sector, especially in the hilly regions of the North and North East.

However, connectivity has been an area of concern which has restricted existing tourist inflows only to a handful of destinations. Multi-modal focus on air, road and rail will significantly improve last mile connectivity. Boost to regional air connectivity through UDAN and NABH Nirman schemes and upgradation of smaller airports and helipads will bring remote and hinterland destinations into the mainstream. Additionally, implementation of Bharatmala project and proposed Seaplanes will also open up avenues to leverage Coastal and Maritime Tourism. Such models will not only diversify tourist footfalls, but also boost the associated revenue receipts.

A robust digital ecosystem built on IoT, AI, Machine Learning and rural broadband connectivity will also transform India into a 'Smart Tourism' destination. These technologies will facilitate ease of information access, hassle-free payment mechanisms, improved safety and security as well as provide unique insights on behavior and preferences of tourists.

I am pleased to present the YES BANK - FICCI Knowledge Report '**Inbound Tourism: Decoding Strategies for Next Stage of Growth**' which highlights the sector's huge potential and provides key recommendations. I am confident that this publication will promote meaningful dialogue between all stakeholders towards achieving the mission of doubling FTAs to 20 million by 2020.

Thank You.

Sincerely,

Rana Kapoor
Managing Director & CEO YES BANK
Chairman YES Global Institute

FOREWORD



Over the past two decades, tourism has emerged as one of the sunrise sectors of our economy, demonstrating the potential to be a strong socio-economic enabler, fostering models for sustainable, inclusive growth. As per WTTC 2018 report, travel and tourism contributed 9.4% to the country's GDP and accounted for 8.0% of the total jobs in 2017. Further, Travel & Tourism investment in 2017 stood at USD 41.6 bn, 6.3% of total investments. It is projected to rise by 6.7% in 2018, and rise by 6.7% pa over the next ten years to USD 85.2 bn in 2028, 6.1% of total.

Tourism is the most promising industry globally which possesses tremendous capacity for growth and revenue generation. The challenges in this sector lie in successfully preserving these in their original form, and making them accessible to domestic and international travelers, together with safeguarding the economic interest and heritage of local communities.

The Union Government of India realizes the potential of tourism industry in India which is evident from the fact that the Ministry of Tourism has undertaken a slew of initiatives such as extending e-tourist Visas to 163 countries, releasing M-Visa, launch of marketing initiatives like Incredible India 2.0, Swachh Paryatan Mobile app, 24*7 Multi-lingual Tourist Helpline among others that have fuelled impressive tourism growth.

Schemes such as PRASAD, HRIDAY, Swadesh Darshan and PIDDC envisage development of seamless infrastructure through theme-based circuits and improvement of linkages between major tourist destinations, and the industry needs to join hands with the government to deliberate on effective enablers to such policies across ministries and state governments.

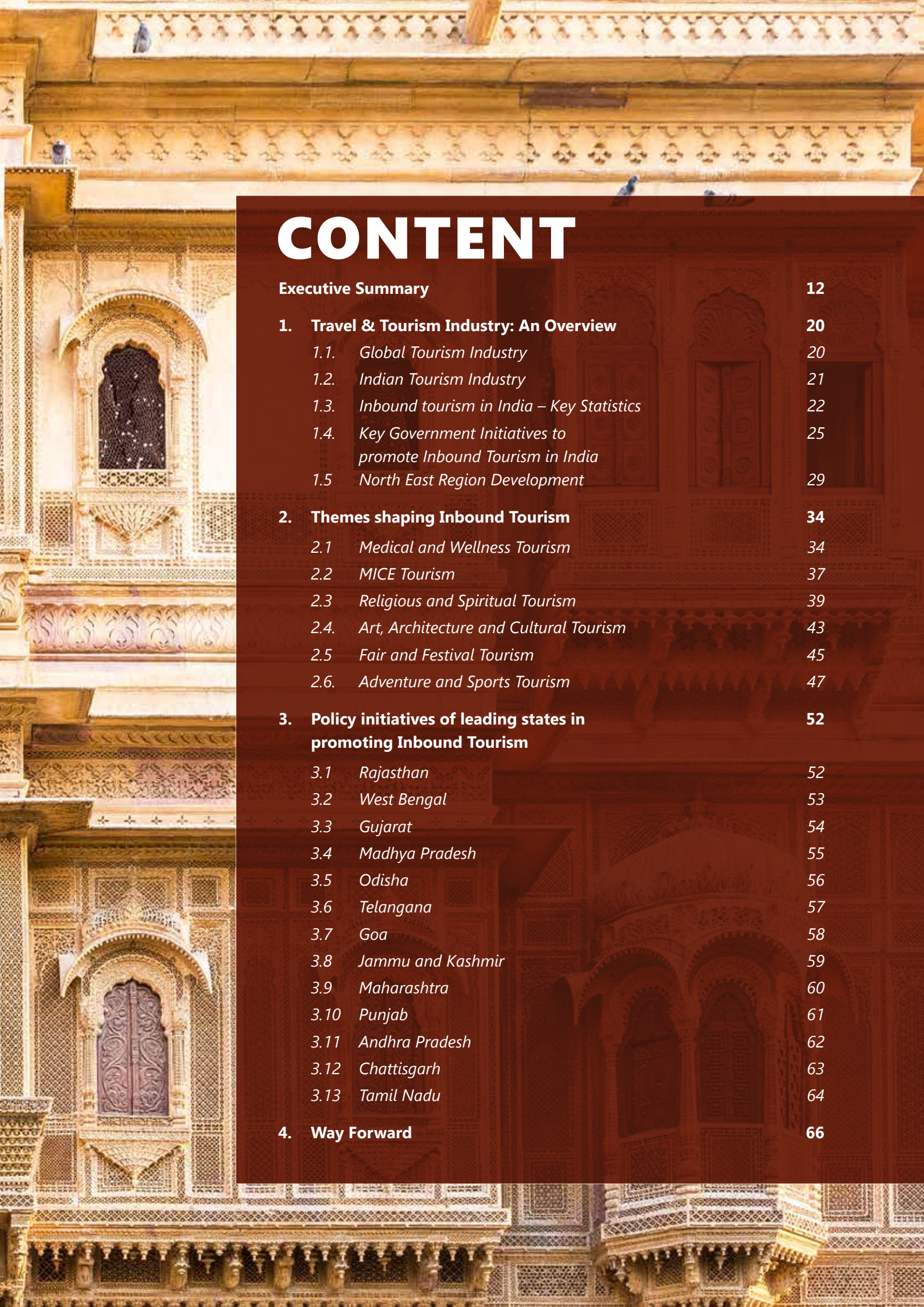
I am pleased to present the FICCI - YES BANK Knowledge Report 'Inbound Tourism: Decoding Strategies for Next Stage of Growth' which highlights the current tourism landscape, potential areas of development and key initiatives for India to rise on the global tourism map.

Sincerely,



Dr. Jyotsna Suri,
Past President, FICCI;
Chairperson, FICCI Tourism Committee & CMD, The Lalit Suri Hospitality Group





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Executive Summary



Executive Summary

Travel & Tourism has evolved as one of the key enablers of socio-economic growth globally as it stimulates engagement & collaboration of different stakeholders including tourists, community, governments and businesses across the tourism value chain. Acting as an umbrella industry, tourism have spillover impacts on multiple sectors and offers enormous economic growth prospects for any country. Total employment contribution of tourism sector accounts for 9.9% of global employment in 2017, supporting twice as many jobs as financial sector. Also sector's contribution to global GDP (10.4% in 2017) is higher than many other sectors

The report *India Inbound Tourism: Decoding Strategies for Next Stage of Growth* focuses upon Global tourism perspective and India's potential for further attracting inbound tourism followed by key initiatives taken by union & state governments to promote Indian tourism industry. It aims to showcase a knowledge based factual account of the potential of inbound tourism in India, the general tourism trends, various themes shaping inbound tourism in India by providing niche experiences and luxury tourism to international tourists, through the means of Medical and Wellness, MICE travel, Religious & Spiritual tourism and most latest through promotion of India as prime adventure destination.

Further the report lays emphasis on creating holistic ecosystem and need for involvement of state governments in policy making and highlighting key initiatives undertaken by major states to bring in investments in tourism sector.

Present Scenario of Tourism in India

India offers a wide range of tourism wealth to inbound tourists and is well positioned to take the advantage of its tourism sector which possesses some of the greatest wealth. Since the launch of the Incredible India campaign in 2003, the government has laid special focus on inviting foreign visitors

to India. Through the recent impetus to promote tourism with Incredible India 2.0 and significant increase in annual budget expenditure for Ministry of Tourism, the focus of the Government of India is to promote the brand "India".

From an economic point of view, Indian tourism sector is a significant source of foreign exchange and an important source of employment, especially as it helps local and host communities. India's diverse product offerings attracted nearly 10.17 mn foreign tourists in 2017 against 8.80 mn in 2016, a growth of 15.6%. Travel & Tourism investment in 2017 stood at USD 41.6 bn, 6.3% of total investment. It is projected to rise by 6.7% in 2018, and by 6.7% pa over the next ten years to USD 85.2 bn in 2028, 6.1% of total.



A snapshot of following key stats indicates rising trend of tourism in India:

Higher Investments	Tourism's contribution to capital investment is projected to grow 6.7% p.a. during 2018–28, higher than the global average of 4.5%.
Visitor Exports	Visitor exports generated USD 27.3 bn, 5.8% of total exports in 2017 and is projected to grow by 5.5% pa, from 2018-2028, to USD 50.9 bn in 2028, 5.1% of total.
Contribution to GDP above world average	The total contribution of Travel & Tourism to GDP was USD 234.0 bn, 9.4% of GDP in 2017 and expected to rise by 6.9% pa to USD 492.2 bn, 9.9% of GDP in 2028.
Employment Generation	In 2017, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry was 8.0% of total employment (41,622,500 jobs).
Domestic Tourism	Domestic travel spending generated 87.2% of direct Travel & Tourism GDP in 2017 compared with 12.8% for visitor exports. Domestic travel spending is expected to grow by 7.4% pa to USD 405.81 bn in 2028.

Major Contributors to Inbound Tourism

Inbound Tourism in India has evolved in the last decade and initiatives have been taken to make the country a popular choice amongst global travelers. The major factors contributing to the rising trend of inbound tourism in India are –

a) Dedicate focus on Promotion & Publicity through initiatives such as Market Development Assistance (MDA); Launch of Incredible India 2.0 campaign; 24*7 Tourist Helpline number, The Great India Blog Train; Launch of documentary series – "Go North East",

b) Major government reforms such as increased budget allocation; introduction of e-Visa; creation of Five Special Tourism Zones and thrust upon tourism infrastructure through schemes like HRIDAY, PRASAD, Swadesh Darshan amongst others,

c) Focus on emerging themes like Adventure Tourism, MICE and Medical Tourism and other niche segments,

d) Special emphasis on North East Region Development,

e) Technological reforms and digital adaptation to attract global visitors,

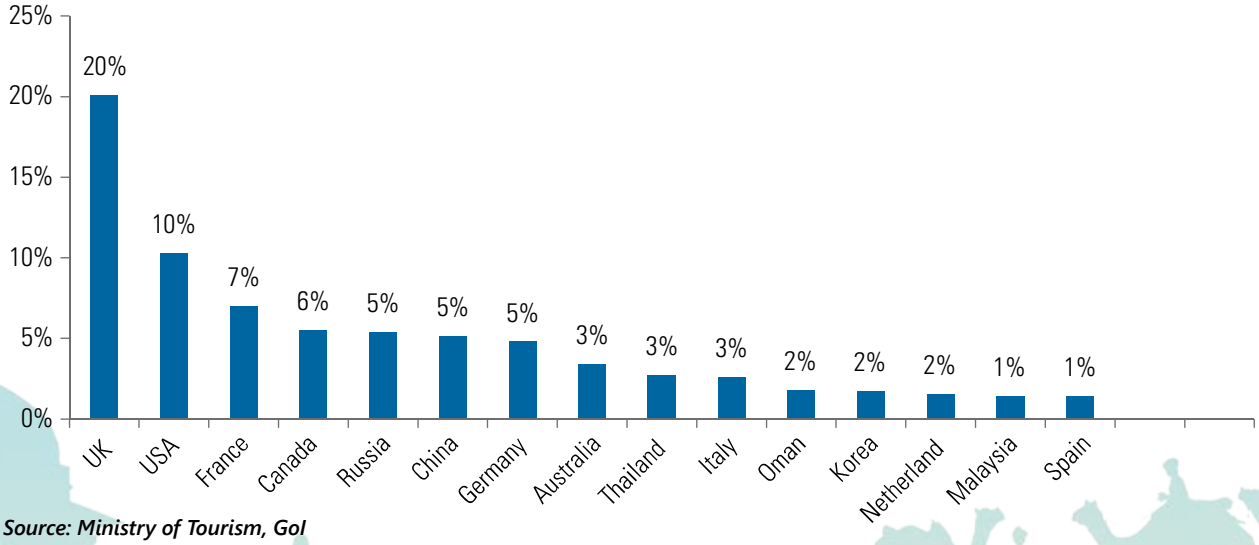
f) Increasing penetration of Foreign Direct Investment in Indian economy,

g) Competitive product offerings coupled with strategic marketing.

Inbound Tourism Trends

The top 10 source countries accounted for 61% of the total inbound tourist flows in the year 2017, according to data from Bureau of Immigration, Government of India. Bangladesh, USA & UK were the top 3 countries in terms of FTAs in India during February 2018. The introduction of e-Visa has led to a strong surge in Foreign Tourist Arrival resulting in a Y-o-Y growth of 62% in February 2018 compared to February 2017. UK, USA and France were the top 3 source countries availing e-Tourist Visa facilities during February 2018 as shown below in the percentage shares of top 15 source countries availing e-Visa facilities.

Figure 1: Top 15 source countries availing e-Tourist Visa during February 2018 (in %)



Source: Ministry of Tourism, GoI

Tourism themes shaping Inbound Tourism in India

Being one of the oldest civilizations with a composite culture in the world, India encompasses numerous tourist themes with the core motive of showcasing the country's rich culture and heritage.

The maximum numbers of FTAs are interested to dwell in the country's Medical, Spiritual, Cultural, MICE and Adventure & Recreational Tourism offerings. With the sheer breadth and depth of the variety of tourism in India, a large number of foreign travellers also come to explore the flora, fauna and wildlife of the country.

Key Initiatives by Government

India has been constantly attracting a plethora of foreign visitors from various countries around the world. Tourism has also been an integral part of the country's five-year plan, with the draft National Tourism Policy giving it a momentous push. Further other campaigns like Make in India, Skill India and Digital India will up-skill Indian human resources to global standards of best practices and work excellence.

Various initiatives being taken up by Government of India which in future may be very beneficial for growth of tourism industry in India are:

Ministry of Civil Aviation	• New Civil Aviation Policy 2016 • Regional Connectivity Scheme introduced for enhancing regional connectivity • Encouragement to Foreign Direct Investment • Six airports across major cities are being developed under PPP model • Encouragement to Seaplanes operations for tourism in conjunction with Helicopter services • Launch of dedicated Airline Service to North-East states
Ministry of Railways	• Railways proposes to run tourist trains in various Pilgrim Circuits • 100% FDI in the railway infrastructure • Launched mobile ticketing services, introduction of e-catering • Launched India's first semi high speed train Gatimaan Express • High speed Wi-Fi launched at various stations with a target of 400 stations by 2018 • Introducing toll free 24 X 7 All India Helpline number • Plans to preserve few of its 5 metre-gauge tracks built during the early British era and run them as heritage lines to promote it as heritage tourism

Ministry of Shipping	• Preparing action plan and detailed road map for the development of cruise tourism in India • Development of 78 lighthouses in the country as centers of tourism under Public Private Partnership (PPP) • Sagar Mala project to modernize India's Ports • Development of mega cruise terminal at Mumbai
Ministry of Road Transport & Highways	• 100% FDI in the road sector is allowed under the automatic route in the road and highways sector • Formulated a 7 phase programme, 'National Highway Development Project' for boosting transport infrastructure of the country • Special Accelerated Road Development Programme for the NE Region • Launched infrastructure developmental programmes like 'Bharat Nirman', 'Bharat Mala', 'Setu Bharatam' development of way side amenities at 33 identified locations
Ministry of Environment, Forest & Climate Change	• MoEFCC plays a pivotal role in development of Ecotourism through various policies and developmental initiatives like Integrated Ecotourism Plan for Districts • Introduced online submission of applicants for Environment, CRZ and Forest approval to ensure transparency • Launch of Green India Mission with the vision of enhancing India's tree cover to 33% by 2022
Ministry of External Affairs	• Pravasi Bhartiya Divas at different parts of India • All embassies across the world promote different tourist destinations of the Country • Ministry of External Affairs shall organize events like BRICS/ SAARC Tourism Summits to promote tourism in the region. • Flagship publication "India Perspective" provides an insight into India's culture and tradition along with elements of contemporary India
Ministry of Culture	• Launched "Adopt a Heritage Project" to provide world class tourist facilities at the various natural/cultural heritage sites, monuments and other tourist sites. The project envisages to entrust heritage sites to the private/public sector companies, and individuals for development of tourist amenities. They would become 'Monument Mitra' and adopt the sites essentially under their Corporate Social Responsibility (CSR) activity

Ministry of Home Affairs	• Launched the web-based application 'e-FRRO' (e-Foreigners Regional Registration Office) to make visa processes easier for foreigners. The online portal will facilitate 27 Visa and Immigration related services to foreigners visiting India. Further, travelers and foreign students in India staying for more than 180 days won't have to go through the inconvenience of going in to their local Foreigners Regional Registration Office (FRRO) any more.

Source: http://indiainbusiness.nic.in/newdesign/upload/FICCI-YES-BANK-Tourism-Report.pdf

Furthermore, various leading state governments have taken aggressive steps to attract inbound tourists like signing of agreements with private investors, participation in international tourism fairs, investment in product development and rigorous marketing and promotion amongst other initiatives to attract inbound tourism.

Way Forward

While crossing 10 million foreign tourist arrivals is a momentous occasion for the tourism industry, it is important to acknowledge the fact that this is just the tip of the iceberg, and while the initial growth surge has been fast, continuing this momentum will require a greater degree of policy dynamism as well as heightened synergy between multiple layers of the industry.

Destination infrastructure, connectivity and technology are the key pillars that will drive the next stage of growth in the tourism sector. The following recommendations can spur investor interest, accelerate development of infrastructure to augment existing and create new destinations, and foster equitable growth though skill development and employment generation.

1. Attract 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 projects like community homestays, tour operators and boat operators.

2. Services Exports from India Scheme (SEIS): Tourism in India accounts for 7.5% of the GDP and is the third largest foreign exchange earner for the country. FEEs during the period January-May 2017 were US$ 11.19 billion with a growth of 21.3%. Given that the forex generated is at par with other industries, Tourism sector should be placed under the Service Exports from India Scheme (SEIS).

3. Review of Coastal Regulatory Zone (CRZ): The Coastal Regulatory Zone Regime while preventing commercialization of the waterfront has also been a limiting factor for coastal tourism despite India's long coastline (>7500kms). Local communities in collaboration with the tourism industry can be encouraged to invest and maintain the attractiveness of coastal ecosystems, which will require review of Coastal Regulatory Zone regime to identify and permit eco-friendly activities along waterfronts that can generate new or complement existing economic activities.

4. Ease of Doing Business (EoDB) in Tourism/ Tourism Competitiveness Index: "EoDB Tourism State Rankings" can be introduced by MoT & NITI Aayog, where each State (in consultation with Ministry of Tourism) clearly defines and publishes the list of all approvals required by various agencies (including local bodies) for various types of tourism projects. "Single Window" approval facility for tourism projects should be put in place by all states, in coordination with Ministry of Tourism to permit standardization to the extent possible. Ministry of Tourism should also institute standardized format for collection and publishing of tourism data and statistics across states and districts. This will permit easier decision making by investors as also measurement of impact of initiatives taken by various states and other stakeholders.

5. Land Bank Repository & Investor Facilitation: Availability of suitable land is one of the main concerns for investing in tourism projects. One way to tackle this can be developing more tourism specific land banks, made accessible over an interactive web platform like Google Earth. This will enable the investor to assess the preliminary viability of their projects basis the nature of land parcel without physically visiting the site in the initial stages. This needs to further bolstered by appointing a nodal officer/ land officer to facilitate investor site visits and address queries from 'Inception to Commissioning'.

6. Travel Tech Startups: Tourism today is all about adopting technological advancements to enhance service and information delivery. Companies like Uber and TripAdvisor have shown how modern technology can completely transform the industry landscape. We need to support emergence of Indian Startups in this space.

7. PPP to Revitalize Government Infrastructure: State Tourism Departments can make an assessment of various state Owned Tourism Units that are not being utilized and identify the units which can be operated on suitable PPP models.



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Travel & Tourism Industry: An Overview



Travel & Tourism Industry: An Overview

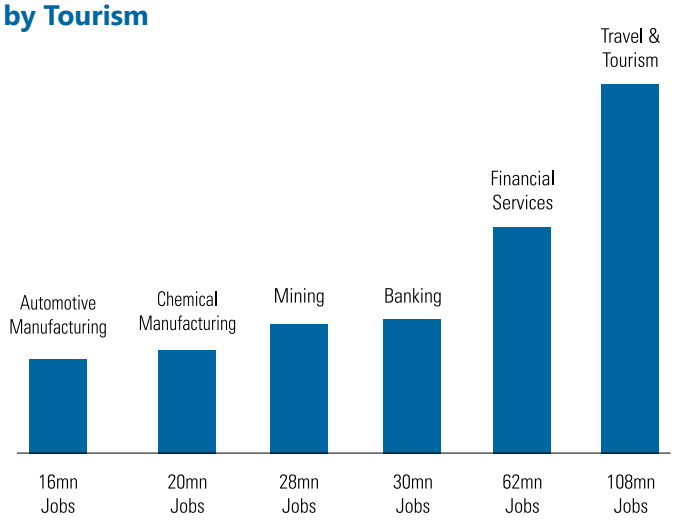
1.1. Global Tourism Industry

Tourism has evolved as one of the key enablers of socio-economic growth globally. An umbrella industry with spillover effects generating economic activity in multiple sectors, tourism offers enormous growth prospects for any country.

As one of the world's largest economic sectors, Travel & Tourism creates employment, pushes exports, and fosters cultural harmony. This is evident from several key indicators highlighted below:

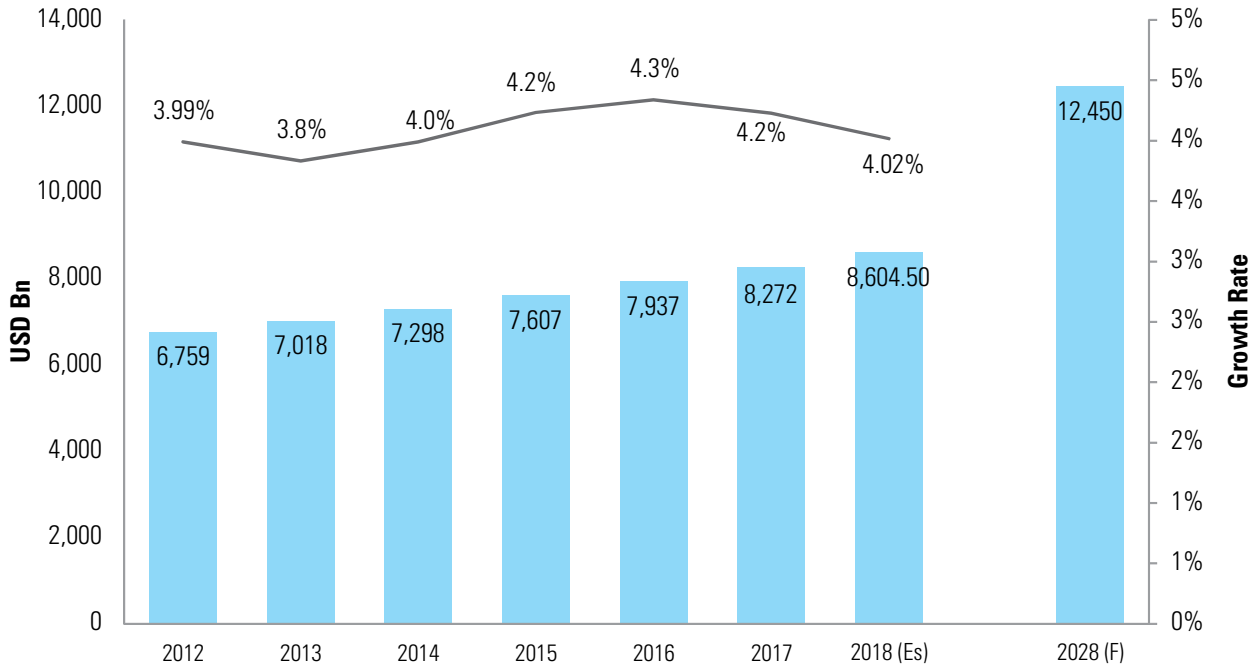
- Total employment contribution of Tourism sector accounts for 9.9% of global employment in 2017, supporting twice as many jobs as financial sector.
- Tourism contribution to global GDP (10.4% in 2017) is higher than many other sectors.
- As projected by World Travel & Tourism Council (WTTC), total contribution of tourism to global GDP grow to USD 12,450.1 bn (11.7% of GDP) by 2028
- Travel & Tourism investment in 2017 was USD 882.4 bn, or 4.5% of total investment. It is projected to rise by 4.3% pa over the next ten years to USD 1,408.3 bn in 2028 (5.1% of total).

Figure 3: Direct Employment supported by Tourism



Source: WTTC

Figure 4: Total Contribution of Tourism to Global GDP (USD Bn) at real 2017 prices



Source: WTTC; Es-Estimated, F-Forecast

1.2. Indian Tourism Industry

Given its diverse socio-cultural precincts and rich heritage, India offers wide range of tourism wealth to foreign travelers from around the world and poised to grow its inbound tourism by taking advantage of its rich resource of tourist attractions and attracting a wealth of tourists from across the globe.

From an economic point of view, Indian tourism sector is a significant source of foreign exchange and an important source of employment, especially as it helps local and host communities. India's diverse product offerings attracted nearly 10.17 mn foreign tourists in 2017 against 8.80 mn in 2016, a growth of 15.6%. Travel & Tourism investment in 2017 stood at USD 41.6 bn, 6.3% of total investments. It is projected to rise by 6.7% in 2018, and rise by 6.7% pa over the next ten years to USD 85.2 bn in 2028, 6.1% of total.

The Indian tourism and hospitality industry has emerged as one of the key drivers of growth among the services sector in India. Tourism's role as a major contributor to Foreign Exchange Earnings (FEEs) provides the incentive to give thrust on boosting inbound tourism.

Key Statistics

Higher Investments	Tourism's contribution to capital investment is projected to grow 6.7% p.a. during 2018–28, higher than the global average of 4.5%.
Visitor Exports	Visitor exports generated USD 27.3 bn, 5.8% of total exports in 2017 and is projected to grow by 5.5% pa, from 2018-2028, to USD 50.9 bn in 2028, 5.1% of total.
Contribution to GDP above world average	The total contribution of Travel & Tourism to GDP was USD 234.0 bn, 9.4% of GDP in 2017 and expected to rise by 6.9% pa to USD 492.2 bn, 9.9% of GDP in 2028.
Employment Generation	In 2017, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry was 8.0% of total employment (41,622,500 jobs).
Domestic Tourism	Domestic travel spending generated 87.2% of direct Travel & Tourism GDP in 2017 compared with 12.8% for visitor exports. Domestic travel spending is expected to grow by 7.4% pa to USD 405.81 bn in 2028.

Source: WTTC - Travel & Tourism Economic Impact 2018, India)



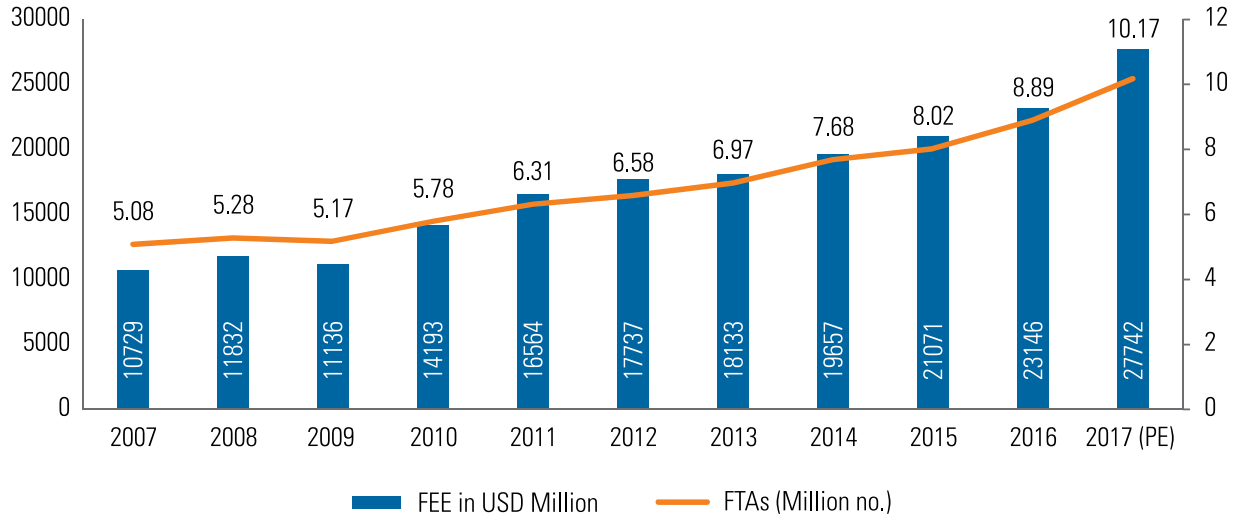
1.3. Inbound tourism in India – Key Statistics

Inbound tourism covers all international tourist traffic entering a country. It is also known as 'export tourism', as tourists enjoy their travel experience within India while paying for it using foreign currency. Inbound tourism gives ability and incentive to diversify product offerings and access new areas of business while also keeping a balance with domestic tourism patterns, which are high in footfalls but relatively low in remunerative ability. Foreign tourists tend to spend more in India than almost any other country worldwide due to its size as well as diversity of culture and geography. These are positive signs for the industry, and indicate significant potential going forward.

Rising Foreign Tourist Arrivals (FTAs)/ Foreign Exchange Earnings (FEEs)

The rising flow of Foreign Tourist Arrivals (FTAs) is clearly a function of the stellar growth performance of emerging tourism trends like MICE along with Spiritual travel and Medical tourism. Furthermore, it goes without saying that FTAs have been able to garner considerable resources for the country and started contributing significantly to the economy. Foreign Exchange Earnings (FEEs) during 2017 were USD 27,742 mn with a growth of 17.0% over 2016. This growth trend is dependent on many external factors including exchange rate and socio–political scenario, however, despite global undulations, FEEs have consistently contributed a significant share to the Tourism GDP of India.

Figure 5: Year wise contribution in terms of FEEs



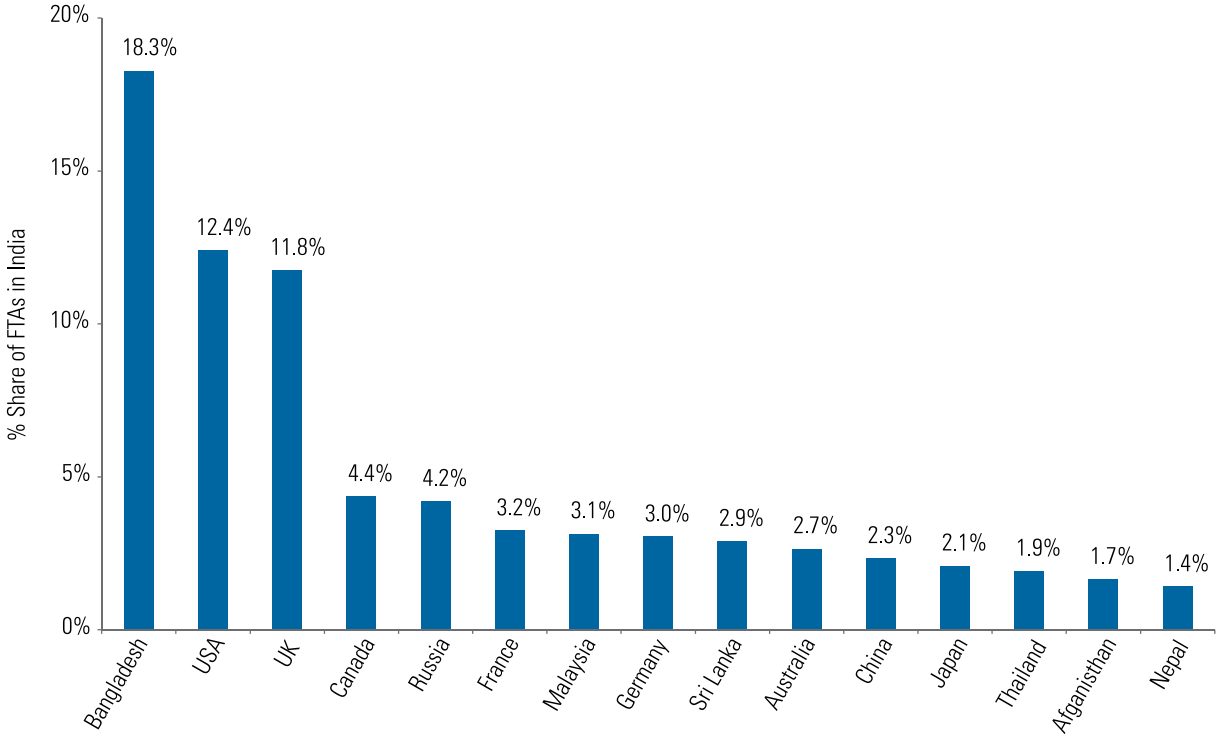
Growth of MICE Tourism

MICE Tourism, the future of business tourism, is the next big growth engine of global as well as Indian tourism industry. The entire world has witnessed the immense potential of MICE Tourism and the indelible impact it delivers on the economy either directly or indirectly. In India, business travel spending accounts for USD 11.61 bn and is expected to grow by 6.7% in 2018 to USD 12.38 bn, and rise by 7.0% pa to USD 24.42 bn in 2028.

India Inbound Tourism: Source Countries

The top 10 source countries accounted for 61% of the total inbound tourist flows in the year 2017, according to data from Bureau of Immigration, Government of India. Bangladesh, USA & UK were the top 3 countries in terms of FTAs in India during February 2018.

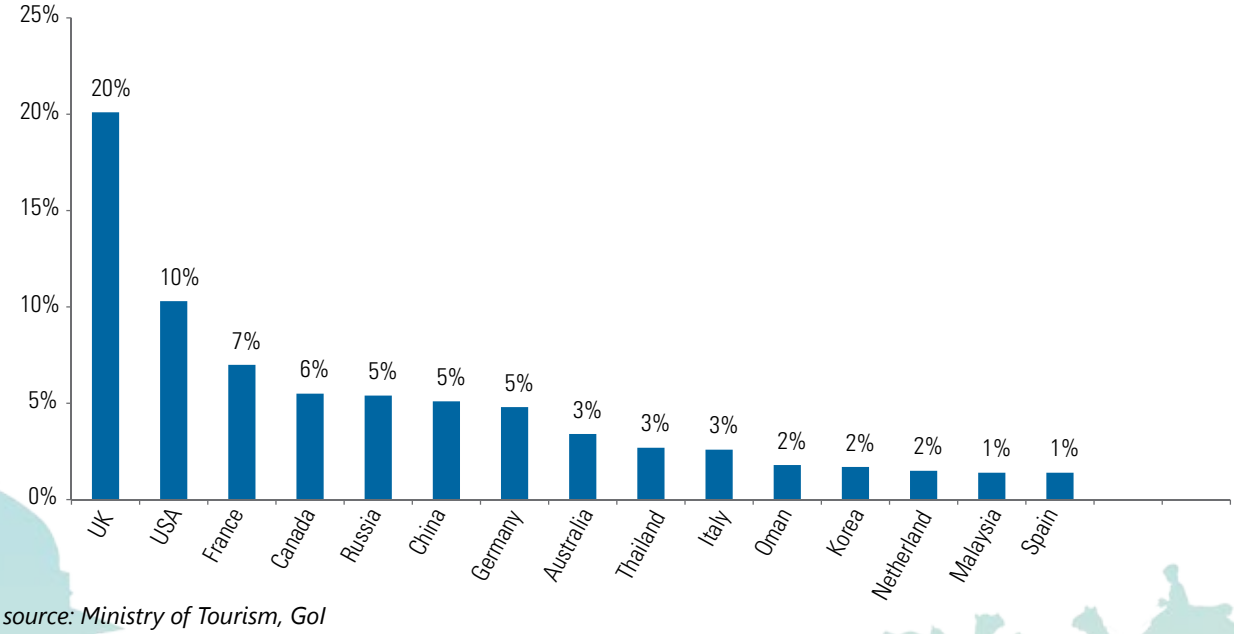
Figure 6: Top 15 source countries of India Inbound Tourism during February 2018 (in %)



Source: Ministry of Tourism, GoI

The introduction of e-Visa has led to a strong surge in Foreign Tourist Arrival resulting in a Y-o-Y growth of 62% in February 2018 compared to February 2017. UK, USA and France were the top 3 source countries availing e- Tourist Visa facilities during February 2018 as shown below in the percentage shares of top 15 source countries availing e-Visa facilities.

Figure 7: Top 15 source countries availing e-Tourist Visa during February 2018 (in %)

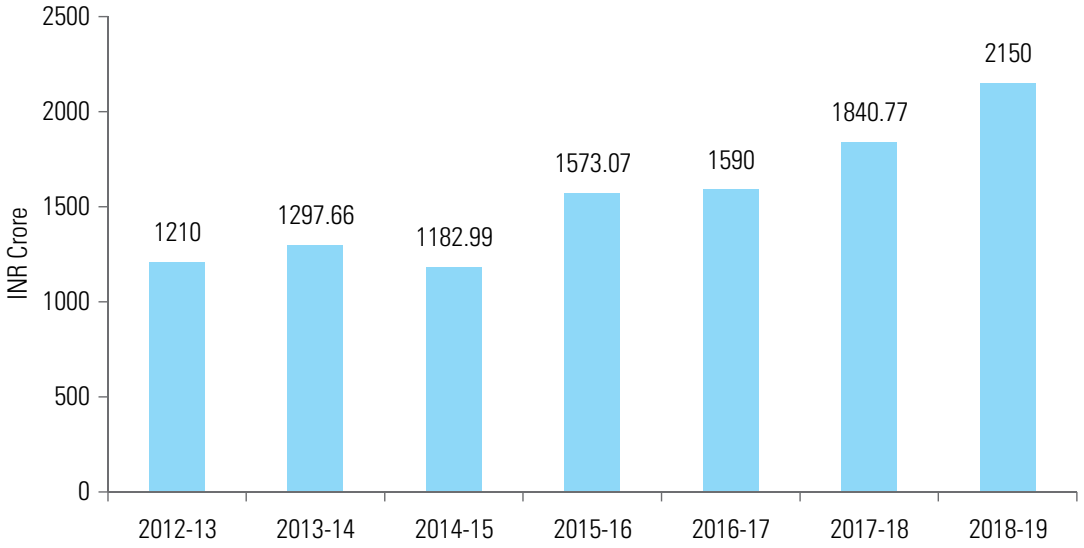


source: Ministry of Tourism, GoI

1.4. Key Government Initiatives to promote Inbound Tourism in India

a. Financial Support: Inclusive growth and ensuring a future with quality jobs is a key aim of the government. Travel & Tourism, which already supports one in every ten jobs on the planet, is a dynamic engine of employment opportunity. Government efforts are now focused upon fast track infrastructure development and promoting tourism digitally. The Union budget has seen a sustained growth in allocation to tourism sector over the past decade.

Figure 8: Budget Allocation to Tourism Sector under Union Budget



Source: www.indiabudget.nic.in

b. Marketing & Promotion: Government of India has taken various steps at international level to boost tourism in the country, which inter-alia include the following:

- Launch of Incredible India 2.0 campaign with market specific content and advertising,
- Restructured Scheme of Overseas Promotion & Publicity Including Market Development Assistance (MDA) to subsidize participation in international travel and tourism expositions. The expenditure incurred for promotion of India Tourism in the overseas markets under MDA in the last 3 years was ₹529.34 crores,
- India Tourism Offices abroad undertake various promotional activities in important and potential overseas markets with the objective of showcasing India's tourism potential. These include participation in travel fairs and exhibitions; organizing road shows, 'Know India' seminars & workshops; organizing

Documentary series "Go North East" launched

The Great India Blog Train

"Swacch Paryatan Mobile app"

and supporting Indian food and cultural festivals; etc. Promotions are also undertaken through the Social Media accounts of the Ministry.

c. Skill development: India is poised to be the youngest nation by 2022 and to tap attract youth towards the sector, Ministry of Tourism has introduced following key schemes to improve capacity building and skill development among youth:

"Huner se Rogar Tak" (HSRT) – special program to impart tourism and hospitality specific skills

- Increasing number of Institute of Hotel Management, Food Craft Institutes, Indian institute of Tourism and Travel Mangement
- Capacity Building for Service Providers.

d. Infrastructure: India's appeal in the global tourism market depends a lot on its capacity to offer world class infrastructure facilities. Government recognizes this need and has introduced following schemes to improve linkages between key tourist locations which shall certainly provide much needed impetus to the tourism infrastructure development in the country.

10 Prominent 'Iconic Destinations'

- Integrated Development of Theme Based Tourist Circuits – Swadesh Darshan
- **Objective:** The scheme was launched in January 2015 with an objective to develop theme based tourist circuits in the country to enrich tourist experience and enhance employment opportunities.
- **Identified Circuits:** 15 Thematic Circuits have been identified for development, namely North East Circuit, Buddhist Circuit, Himalayan Circuit, Coastal Circuit, Krishna Circuit, Desert Circuit, Tribal Circuit, Eco Circuit, Wildlife Circuit, Rural circuit, Spiritual Circuit, Ramayana Circuit, Heritage Circuit, Sufi Circuit and Tirthankar Circuit.
- **Current Status:** Ministry of Tourism has sanctioned 67 projects under the Swadesh Darshan scheme worth ₹ 5638.87 crore so far since its launch in January 2015. For North Eastern region development, the Ministry has sanctioned 14 projects worth ₹ 1267.43 crore covering all the 8 states. For development of Buddhist Circuit, the Ministry has sanctioned 5 projects worth ₹ 361.97 crore to the State Governments of Uttar Pradesh, Andhra Pradesh, Gujarat, Bihar and Madhya Pradesh.

National Mission on Pilgrimage Rejuvenation and Spiritual, Heritage Augmentation Drive (PRASAD)

- **Objective:** Integrated development and beautification of pilgrimage destinations in a planned, prioritized and sustainable manner to provide complete religious tourism experience so as to harness pilgrimage tourism for its direct and multiplier effects on employment generation and economic development.

- **Identified Projects:** 25 religious sites have been identified for development including Amritsar, Kedarnath, Ajmer, Mathura, Varanasi, Gaya, Puri, Dwarka, Amaravati, Kanchipuram, Vellankanni, Kamakhya and Patna have been identified for development under PRASAD Scheme. 23 projects worth ₹ 687.92 crore have been sanctioned so far under the scheme.

e: Tourism 'Themes': To attract foreign tourists, adventure tourism is regularly highlighted for promotion as part of the Incredible India Campaign. A Task Force on Adventure Tourism was been set up in October 2016 to act as a forum for resolving issues related to development and promotion of Adventure Tourism in the country. Government decided to promote 2018 as the 'Year of Adventure Tourism'. Apart from the above, Government is focused on promotion of Niche products like Cruise, Medical, Wellness, Golf, Polo, Eco, Film and Meeting Incentives Conference and Exhibition (MICE).

2018 - 'Year of Adventure Tourism'

f. Electronic-Visa: Boost to FTAs is being provided through the e-Visa on Arrival initiative, an online Indian tourist visa granted to citizens of certain eligible countries upon arrival in India. E- Visa facility is now extended to citizens of 163 countries which has resulted in increase in number of tourist visa issued in the country.

e-visa extended to 163 countries

There has been growth of 62% YoY in the tourist arrival on e-Visa during February 2018 registering a figure of 2.76 Lakhs. During January- February 2018, a total of 5.16 lakh tourist arrived on e-Visa as compared to 3.22 lakh during January-February 2017, registering a growth of 60.3%. This clearly outlines the steady success of e-Visa facility in quantifiable terms.

A 'Welcome Card' has been launched for distribution at immigration counters to tourists arriving at international airports. Additionally from February 2017 free SIM Cards with pre-loaded talk time and data has been made available for all tourists arriving in India on e-Visa at the ITDC counter at IGI Airport.

24x7 Toll Free multilingual Helpline - 1800-11-1363 or code: 1363

g. Incredible India Tourist Helpline: A 24x7 Toll Free multilingual Incredible India Tourist Helpline was launched in February 2016. The helpline provides assistance and information to tourists in 12 major International languages including Hindi, English, Arabic, French, German, Italian, Japanese, Korean, Chinese, Portuguese, Russian and Spanish.

9 Islands as growth zones &

5 Special Tourism zones

h. Special Tourism Zones: For the development and promotion of tourism in the country, the Government has proposed the creation of Five Special Tourism Zones, anchored on SPVs in partnership with the States. Creation of Special Tourism Zones would lead to overall development of the areas and offer diverse tourism experiences which would help in creating livelihood and improve standards of local communities living in those areas. Also 9 islands has been identified to be developed as tourism growth zones.

h. Initiatives by Government

Ministry of Civil Aviation	• New Civil Aviation Policy 2016 • Regional Connectivity Scheme introduced for enhancing regional connectivity • Encouragement to Foreign Direct Investment • Six airports across major cities are being developed under PPP model • Encouragement to Seaplanes operations for tourism in conjunction with Helicopter services • Launch of dedicated Airline Service to North-East states
Ministry of Railways	• Railways proposes to run tourist trains in various Pilgrim Circuits • 100% FDI in the railway infrastructure • Launched mobile ticketing services, introduction of e-catering • Launched India's first semi high speed train Gatimaan Express • High speed Wi-Fi launched at various stations with a target of 400 stations by 2018 • Introducing toll free 24 X 7 All India Helpline number • Plans to preserve few of its 5 metre-gauge tracks built during the early British era and run them as heritage lines to promote it as heritage tourism
Ministry of Shipping	• Preparing action plan and detailed road map for the development of cruise tourism in India. • Development of 78 lighthouses in the country as centers of tourism under Public Private Partnership (PPP) • Sagar Mala project to modernize India's Ports • Development of mega cruise terminal at Mumbai
Ministry of Road Transport & Highways	• 100% FDI in the road sector is allowed under the automatic route in the road and highways sector • Formulated a 7 phase programme, 'National Highway Development Project' for boosting transport infrastructure of the country • Special Accelerated Road Development Programme for the NE Region • Launched infrastructure developmental programmes like 'Bharat Nirman', 'Bharat Mala', 'Setu Bharatam' development of way side amenities at 33 identified locations

Ministry of Environment, Forest & Climate Change	• MoEFCC plays a pivotal role in development of Ecotourism through various policies and developmental initiatives like Integrated Ecotourism Plan for Districts • Introduced online submission of applicants for Environment, CRZ and Forest approval to ensure transparency • Launch of Green India Mission with the vision of enhancing India's tree cover to 33% by 2022
Ministry of External Affairs	• Pravasi Bhartiya Divas at different parts of India • All embassies across the world promote different tourist destinations of the Country • Ministry of External Affairs shall organize events like BRICS/ SAARC Tourism Summits to promote tourism in the region • Flagship publication "India Perspective" provides an insight into India's culture and tradition along with elements of contemporary India
Ministry of Culture	• Launched "Adopt a Heritage Project" to provide world class tourist facilities at the various natural/cultural heritage sites, monuments and other tourist sites. The project envisages to entrust heritage sites to the private/public sector companies, and individuals for development of tourist amenities. They would become 'Monument Mitra' and adopt the sites essentially under their Corporate Social Responsibility (CSR) activity
Ministry of Home Affairs	• Launched the web-based application 'e-FRRO' (e-Foreigners Regional Registration Office) to make visa processes easier for foreigners. The online portal will facilitate 27 Visa and Immigration related services to foreigners visiting India. Further, travelers and foreign students in India staying for more than 180 days won't have to go through the inconvenience of going in to their local Foreigners Regional Registration Office (FRRO) any more.

Source: http://indiainbusiness.nic.in/newdesign/upload/FICCI-YES-BANK-Tourism-Report.pdf

1.5 North East Region Development

The Ministry promotes India as a holistic destination including North Eastern Region as part of its on-going activities, releases print, electronic, online and outdoor media campaigns in the domestic and international markets, under the Incredible India brand-line, to promote tourism products and destinations of the country. MoT also promotes the tourism destinations and products through its websites and publicity and promotional material produced by it from time to time. Initiatives undertaken for development of tourism in north east region are :

- 12 Institutes of Hospitality Management sanctioned in north-east states in August 2016.

- **Marketing and Promotional Campaigns:**
    - To promote India's "Act East Policy", 6th International Tourism Mart (ITM) was organized in association with the North Eastern States and with active participation of Ministry of DoNER from 5-7 December, 2017 in Guwahati, Assam.
    - CII organised Northeast Tourism Conclave 2017 Unveiling Opportunities in Tourism in September, 2017.
    - Domestic Television Campaigns to promote tourism in the North-East Region released on Doordarshan in October, 2017 during Paryatan Parv.
    - North East Calling – A two day festival organized by Ministry of DoNER at India Gate, New Delhi from 9th – 10th, September 2017.
    - North East Travel Conclave, Shillong organized by Indian Chamber of Commerce.
    - Familiarization (FAM) Tours to the North Eastern Region are arranged for Travel and Media Representatives from Overseas to the States in the regions on a regular basis under the Hospitality Scheme of this Ministry.
    - Protected Area Permit (PAP):- On steady persuasion of Ministry of Tourism, the entire area of the states of Manipur, Mizoram and Nagaland have been excluded from the Protected Areas regime for a further period of five years beyond 31.12.2017 i.e. till 31.12.2022
    - Financial aid extended for events like Namami Brahmaputra and Brahmaputra Film Festival, Guwahati.
- NER provides a wonderful opportunity for '***Experiential Tourism***' and is gradually witnessing an increase in tourist arrivals and emerging as a destination for film makers. To realize the true potential of NER as a film-tourism destination, NETDC is determined to create an conducive environment for ease of film shooting.
- Infrastructure development: Various projects are sanctioned under central schemes in North Eastern Region such as:

PRASAD Scheme

State	Project	Amount Sanctioned (₹ Cr)
Assam	Development of Kamakhya Temple and Pilgrimage Destination in and around Guwahati.	33.98

Swadesh Darshan Scheme

State	State	Project	Amount Sanctioned (₹ Cr)
North East	**Arunachal Pradesh**	Development of Mega Circuit Bhalukpong-Bomdila-Tawang	49.76
		Integrated Development of New Adventure Tourism in Arunachal Pradesh	97.13
	Manipur	Development of Tourist Circuit in Manipur-Imphal-Moirang-Khongjom-Moreh.	89.66
	Meghalaya	Integrated Development of Umiam Lake view-Ulum Sohpetbneng- Mawdiangdiang orchid lake resort in Meghalaya.	99.13
	Mizoram	Integrated Development of New Eco Tourism North East Circuit at Thenzawl & South Zote, District Serchhip and Reiek.	94.91
	Sikkim	Development of Tourist Circuit linking Rangpo (entry) – Rorathang-Aritar-Phadamchen-Nathang-Sherathang-Tsongmo- Gangtok-Phodong-Mangan- Lachung-Yumthang-Lachen.	98.04
		Development of Tourism Circuit in Sikkim- Singtam-Makha-Lingmoo-Yangang-Ravangla-Temi-Bermoik Tokal-Phongla-Namchi-Jorethang-Budang-Okharey-Sombaria-Daramdin.	95.32
	Tripura	Development of North East Circuit : Agartala - Sipahijala - Melaghar - Udaipur - Amarpur - Tirthamukh - Mandirghat – Dumboor-NarikelKunja - Gandachara – Ambassa.	99.58
Wildlife	**Assam**	Development of Manas – Probitora – Nameri – Kaziranga – Dibru – Saikhowa as Wildlife Circuit in Assam.	95.67
Heritage	**Assam**	Development of Tezpur-Majuli-Sibsagar under Heritage Circuit.	98.35
Spiritual	**Manipur**	Development of Spiritual Circuit in Manipur-Shri. Govindajee Temple-Shri. Bijoy Govindajee Temple- Shri Gopinatha Temple- Shri Bungshibodon Temple-Kaina Temple.	53.79

State	State	Project	Amount Sanctioned (₹ Cr)
Eco	**Mizoram**	Development of Eco-Adventure Circuit Aizawl - Rawpuichhip – Khawhphawp – Lengpui – Durtlang – Sakawrhmuituaitlang - Muthee – Chitelui - Beratlawng -Tuirial Airfield – Hmuifang.	99.07
Tribal	**Nagaland**	Development of Tribal Circuit Peren- Kohima-Wokha, Nagaland Development of Tribal Circuit Mokokchung-Tuensang-Mon in Nagaland.	97.36 99.66
Total			1267.43



2

Themes shaping Inbound Tourism



Themes shaping Inbound Tourism

2.1 Medical and Wellness Tourism

- India is fast developing into a Medical & Wellness tourism hub of Asia owing to its superior quality healthcare services offered at affordable prices coupled with dedicated policy framework of Government to promote medical tourism.
- Globally medical tourism market is estimated to touch a market value of USD 40 bn by 2020 and Indian medical tourism industry is expected to touch USD 09 billion by 2020.
- Rising disposable incomes, self-awareness on personal wellbeing and increased air connectivity has encouraged market for wellness services, tourists seeking specialized medical treatments, mainly ayurvedic, spa & other therapies look forward to India as preferred destination.
- With India being the second largest exporter of alternative Medicines (AYUSH- Ayurveda, Unani, Siddha & Homeopathy), there is no doubt that India can emerge as a hotspot for Wellness Tourism due to its availability of facilities in health-restorative cum alternative treatments through a combination of ayurveda, yoga, acupuncture, herbal massages, nature therapies, and other ancient Indian healthcare therapies.

SWOT Analysis

Strengths	Weaknesses
• Presence of world-class hospitals & skilled medical professionals offering high quality yet affordable treatment facilities • Strong presence of advanced healthcare and world class medical technologies, • Inherent knowledge of ancient medical and wellness practices • Among top exporter of alternative medicines.	• Need for international accreditation standards • Need for greater co-ordination between various service providers such as airline, hotels, travel agents and hospitals • Need for skilled manpower in the Medical tourism segment and in core medical support staff except doctors

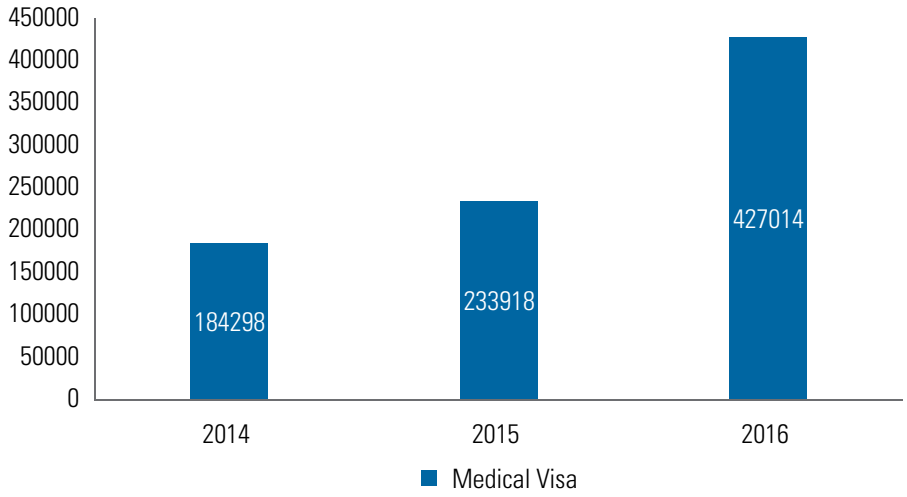
Opportunities	Threats
• Medical hubs through PPP mode can be created to boost medical tourism. • Rising disposable incomes and health consciousness has encouraged market for wellness tourism • Increasing demand for healthcare services from developed countries like US & UK	• Competition from neighboring countries like Thailand & Singapore

Key Government Initiatives

- Establishment of National Medical and Wellness Tourism Promotion Board for promotion of medical & wellness tourism in India. Further, to promote wellness tourism government has set up a dedicated Ministry of AYUSH with an aim of promoting India as the Global Capital of AYUSH.
- Medical and Medical attendant visa has been introduced to streamline and ease the travel process for Medical Tourists. The e-tourist visa regime has also been expanded to include medical visits as well.
- Government is in process to set up facilitation counters at the major airports of Delhi, Mumbai, Chennai, Kolkata, Hyderabad and Bengaluru for tourists arriving on Medical Visas.

Triple entry for those availing e-medical visa

Figure 10: Number of FTAs in India on Medical Visa



- The Ministry offers financial assistance in form of Marketing Development Assistance for Publicity and organizing Wellness & Medical Tourism Promotional events/workshops/ seminars to accredited Medical and Wellness Tourism Service Providers and Chambers of Commerce, etc.
- A film on Medical Tourism has been produced in association with BBC and is used at various platforms for promotional purposes.

- The Department of Commerce and Services Export Promotion Council (SEPC) has launched a Healthcare Portal www.indiahealthcaretourism.com in English, Arabic, Russian and French languages as a single source platform providing comprehensive information to medical travellers on the top healthcare institutions in the country.

Key Destinations

- **Uttarakhand** – Known as the **'Devbhumi'**, it has the presence of hot springs which have the potential to be developed into wellness tourism destinations, complete with high-end spa facilities and yoga and meditation retreats.
- **Kerala** – Known as **God's Own Country**, it is highly regarded as the birthplace of Ayurveda and the rich biodiversity in the Western Ghats.
- **Chennai** – The gateway of South India has already established itself with the availability of the quality and affordable hospitals and the availability of the various treatment facilities.
- **Hyderabad** – With the announcement of launching Medical Tourism Hub (MT-Hub) on the lines of T-Hub by the Telangana Government, Hyderabad is soon to experience the increase in the arrival of the medical tourists.
- **Mumbai** – The financial capital of India is also one of the leading destination of the medical tourism due to the well-connected infrastructure, state-of-the-art health care facilities, well-trained medical professionals and low cost of delivery.
- **North East** – With increase in connectivity, states like Sikkim, Meghalya and Arunanchal Pradesh which are home to natural hot springs, lush green forests and blissful waterfalls has potential to emerge as leading destinations for world class wellness centers.
- Other emerging wellness tourism destinations include **Karnataka, Himachal Pradesh, Uttar Pradesh and Haryana.**

Suggestive Recommendations

- Aggressively branding wellness program in places like North East Region, Uttarakhand and Kerala on 'International Yoga Day' under Incredible India 2.0 campaign will increase chance of inbound tourists,
- Development of medi-cities and centres of excellence on PPP mode,
- Framework to standardize accreditations of hospitals and other medical & wellness service providers to ensure the service standards and quality,
- Focused thrust on making India a brand in medical tourism or MVT (Medical Value Travel) through road shows and branding efforts through all Indian embassies,
- Stakeholder consortium including Ministry of AYUSH, Ministry of Tourism and other national & international tourism organizations for promoting India as a global medical and wellness tourism destination by showcasing the strengths of AYUSH systems,

- Provision of special incentives for setting up AYUSH based wellness centers across all major tourism destinations in India.

2.2 MICE Tourism

- The global MICE industry generated revenue of USD 752 bn in 2016, and is expected to grow at a CAGR of 7.5% to reach USD 1,245 bn by 2023.
- Globally MICE contributes 54% to the global travel market with North America having the largest market share followed by Europe and Asia Pacific. Asia-Pacific is expected to be the fastest growing segment with highest CAGR of 8.6% during 2017-23, owing to the rapid growth in the business travel sector in recent decades.
- Furthermore, economic growth, regional cooperation, intellectual development, and high penetration of internet & technology in the developing countries like India are expected to boost the market growth in the region. Penetration of IoT supports both travelers and travel operators in managing different operations related to business travel such as planning, booking, and being updated with the current status of their travel program.
- India is in the process of upgrading its MICE (Meetings, Incentives, Conferences & Exhibitions) facilities. A large number of world class Convention Centres are now available in India. According to the International Congress & Convention Association (ICCA) Statistics Report 2016, India ranked 31st in the Worldwide Rankings and 7th in Asia Pacific & Middle East Rankings with 143 major meetings being conducted in the country.
- The MICE industry contributes 0.22% to the GDP of the country while it contributes 3.26% to the tourism industry in India. India is estimated to generate 6.5 Million outbound luxury and MICE tourists annually by 2020, reinforcing the country's influence as a key source market for MICE and luxury travel.

SWOT Analysis

Strengths	Weaknesses
• India's strategic location and round the year destination • Variety of destinations & varied products to enhance MICE product • Well-connected infrastructure with 31 international airports & 5 cruise ports and presence of 08 major metro cities & 99 smart cities. • Known for consumer spending towards leisure weddings.	• Late starters and not evenly spread state of art MICE facilities, • Non-compliance to International Standards • Need for large conventional facilities such as Davos • Need for quality accommodations at wedding destinations

Opportunities	Threats
• India being a land of diverse tourist attractions have the potential to become leading destination for MICE Tourism and prime wedding tourism destination. • Can earn large revenue and generate new employment opportunities • India can offer state of art facilities at very price competitive	• Competition from the South East, Middle East and East Asian Nations. • Competitors have first mover advantage and can price the product effectively

Key Government Initiatives

- The Ministry of Tourism extends Central Financial Assistance (CFA) to the State Governments and Union Territory Administrations for developing tourism and tourism related infrastructure including Convention centres, cultural centres etc., under relevant schemes for projects submitted by them including funding for PPP projects under Large Revenue Generating (LRG) Projects.
- India Convention Promotion Bureau at the National Level is formed for promotion of MICE Tourism while convention Promotion Boards being set up at state levels.
- The Ministry of Tourism proposes to provide a single window clearance for organizing meetings and conventions in India.
- Under MDA scheme, Ministry of Tourism provides financial assistance towards bidding for International Conferences / Conventions, and provides financial support on winning the bid.
- The Government also proposes to promote MICE facilities across all the major regions of India and encourage it under "Smart Cities".
- VISA facilitation in terms of ETA.

Key Destinations

- New Delhi — The country capital is also the leader on the country's MICE map. The city has 26 renowned locations which are capable of hosting MICE events. The locations include Pragati Maidan, Indian Habitat Centre, The Lalit, and Taj Hotel amongst others.
- Agra — The city which is home to the 7th wonder of the world also has 7 grand hotels which are ideal MICE destinations.
- Hyderabad — The city of pearls is also home to International Convention Centre famous for hosting various MICE events of International repute.
- Mumbai — The financial capital of the country also has 38 locations which are preferred MICE destinations apart from the stunning tourist locations.
- Jaipur — The Royal Pink City of India has 11 exquisite locations which are capable of holding mega MICE events.

- Small scale or specific theme based MICE events are now gaining importance in the tier-2 cities due to the presence of the international airports and its inherent tourism offerings like Amristar (Golden Temple), Gaya (Buddhist pilgrimage), Madurai (presence of religious importance), Varanasi (pilgrim spot) and Port Blair (presence of island).
- India by its virtue of unexplored lush green forests and fields as well as picturesque beaches has the potential to emerge as hot spot for theme weddings in destinations like Goa, Puducherry, Kerala, Mussoorie, Udaiper, Vizag, Hyderabad and Jaipur.

Suggestive Recommendations

- Construct new convention and exhibition centers and spread MICE facilities evenly.
- Develop a 360 degree approach to promote MICE Tourism - Improve air and road connectivity further.
- Promote India as prime MICE Destination through aggressive marketing like road shows and participation at the International Events.
- Inviting International Convention Organizers for FAM Tours in order to acquaint them with the facilities and amenities available in India.
- Provide facilities to stakeholders in the form of Marketing Development Assistance for effective marketing.

2.3 Religious and Spiritual Tourism

- Religious tourism is one of the earliest forms of tourism. The idea of the religious pilgrimage begins almost since the dawn of history when human beings have traveled to holy sites. Globally, cities such as Jerusalem, Rome and Mecca continue to attract millions of visitors on a yearly basis.
- India, being the birthplace of four major religions viz Hinduism, Sikhism, Buddhism and Jainism has been in connect with almost all the major religions of the world. Further, with presence of major religious centres like, Tirupati, Amarnath, golden temple, Char-Dham, Bodh gaya, Jama Mazjid amongst others, religious tourism in India is also on upswing and majorly contributing towards inbound tourism in India.
- Nowdays, religious travel & tourism has developed into a much larger and more segmented market. Today's religious travel includes multiple sub-niches that range from the luxury pilgrimage market to backpacking and from religious institutional travel to volunteer-oriented experiences meant to help those in some form of need.

SWOT Analysis

Strength	Weakness
• Religious travel is less prone to economic undulations • Even smaller tourism locations ought to consider for development of spiritual tourism, leading to holistic development of overall region. • Presence of more than 50 very important religious destinations of international repute in India. Most of these temples celebrate Indian festivals on large scale, that in itself are a must-visit.	• Need for standardization: not every destination has standard infrastructure facilities to cater to international tourists, • Religious destinations need to be featured more in marketing and promotional activities
Opportunity	**Threat**
• Religious travel cuts across all demographies, • Product diversification: Most of these destinations have strong potential of developing other tourism offerings around the temples prolonging tourists stay, • Providing direct connectivity from foreign locations to key religious destinations.	• Few of the locations falls under ecologically sensitive zones, hence need caution in development, • Mass pilgrimage events such as kumbh melas if not managed properly can lead to large scale pollution and depletion of natural resources, • Neighboring countries such as Nepal, Cambodia, Sri Lanka have launched targeted promotional campaigns to promote religious tourism.

Key Government Initiatives

- Ministry of Tourism, Government of India has launched two infrastructure development schemes i.e. PRASAD and Swadesh Darshan.
    - o PRASAD (National Mission on Pilgrimage Rejuvenation and Spiritual, Heritage Augmentation Drive), aims at developing infrastructural facilities at 25 religious places in the country. 23 projects worth ₹ 687.92 crore have been sanctioned so far under the scheme.
    - o Integrated Development of Tourist Circuits around Specific Themes - SWADESH DARSHAN: For the development of tourism infrastructure in the country, the Ministry of Tourism has launched the Swadesh Darshan – Integrated Development of Theme Based Tourist Circuits Scheme. Spiritual Circuit, Buddhist Circuit, Ramayana Circuit and Krishna Circuit are part of the 15 thematic Circuits identified for development in the country.
- Assistance to central Agencies : The objective of the scheme is to ensure development of tourism infrastructure by the concerned central agencies like Archaeological Survey of India, Port Trust of India, ITDC, Ministry of Railways, etc. who own the assets, through Central Financial Assistance provided by the Ministry of Tourism, Govt. of India.

- Government of India has started Ganga Rejuvenation project - The Mega Project for development of Varanasi Ghats in September 2014.
- Government of India has started Aastha Circuit trains covering various religious places on February 2017. It offers all inclusive tour packages on different itineraries of varying duration, decided by Indian Railway Catering and Tourism Corporation Ltd. (IRCTC).

Key Destinations:

- Already there are world famous religious sites in India attracting inbound tourists and contributing to regional economy. Some of prime destinations are Golden Temple (Amritsar), Bodh Gaya (Bihar), Venkateshwar Temple (Tirupati Balaji), Jama Masjid (Delhi) and many more.
- Visualizing importance of religious and spiritual tourism, Ministry of Tourism started Swadesh Darshan scheme for integrated development of Theme Based Tourist Circuits under which Spiritual Circuit (₹ 678 Cr), Buddhist Circuit (₹ 361.97 Cr), Ramayana Circuit (₹ 202.76 Cr) and Krishna Circuit (₹ 188.8 Cr) are identified for development of religious tourism in the country. Key destinations identified under these circuits are:

Circuit	State	Project
SPIRITUAL CIRCUIT	Kerala	Development of Sabarimala - Erumeli-Pampa-Sannidhanam, Development of Sree Padmanabha Arnamula-Sabrimala.
	Manipur	Development of Shri Govindajee Temple, Shri Bijoy Govindajee Temple – Shri Gopinath Temple – Shri Bungshibodon Temple – Shri Kaina Temple, Manipur.
	Bihar	Integrated Development of Kanwaria Route: Sultanganj – Dharmshala- Deoghar. Development of Jain Circuit: Vaishali-Arrah-Masad-Patna-Rajgir-Pawapuri-Champapuri Development of Mandar Development Hill & Ang Pradesh under Spiritual Circuit theme of Swadesh Darshan Scheme.
	Uttar Pradesh	Development of Spiritual Circuit (Shahjahanpur-Allahabad-Basti-Ahar-Aligharh-Kasgunj-Sarosi-Pratapgarh-Unnao-Kaushambi- Mirzapur-Gorakpur- Kairana- Doamriyagunj-Bagpat-Barabanki- Azamgarh) Development of Spiritual Circuit –II (Bijnor- Meerut- Kanpur-Kanpur Dehat- Banda- Ghazipur- Salempur- Ghosi- Balia-Ambedkar Nagar- Aligarh- Fatehpur- Deoria- Mahoba-Sonbhadra- Chandauli- Mishrikh- Bhadohi)

Circuit	State	Project
SPIRITUAL CIRCUIT	Rajasthan	Development of Spiritual Circuit– Churu (Salasar Balaji)– Jaipur (Shri Samode Balaji, Ghatke Balaji, Bandheke Balaji)- Alwar (Pandupole Hanumanji, Bharathari)- Viratnagar (Bijak, Jainnasiya, Ambika Temple)- Bharatpur (Kaman Region)- Dholpur (Muchkund) – Mehandipur Balaji- Chittorgarh (Sanwaliyaji)
	Puducherry	Development of Spiritual Circuit in Puducherry under Swadesh Darshan Scheme
BUDDHIST CIRCUIT	Madhya Pradesh	Development of Buddhist Circuit in Sanchi-Satna-Rewa-Mandsaur-Dhar
	Gujarat	Development of Buddhist circuit: Junagadh- Gir-Somnath-Bharuch-Kutch- Bhavnagar- Rajkot- Mehsana in Gujarat
	Bihar	Construction of Cultural Centre adjacent to Maya Sarovar on the western side at Bodhgaya, Bihar
	Uttar Pradesh	"Development of Buddhist Circuit – Srawasti, Kushinagar, & Kapilvastu.
	Andhra Pradesh	Development of Buddhist Circuit: Shalihundam-Thotlakonda- Bavikonda- Bojjanakonda- Amravati- Anupu in Andhra Pradesh
KRISHNA CIRCUIT	Haryana	Development of Tourism Infrastructures at places related to Mahabharata in Kurukshetra, Haryana.
	Rajasthan	Development of Govind Dev ji temple (Jaipur), Khatu Shyam Ji (Sikar) and Nathdwara (Rajsamand) in Rajasthan.
RAMAYANA CIRCUIT	Uttar Pradesh	Development of Chitrakoot and Shringverpur Development of Ayodhya under Ramayana Circuit

Suggestive Recommendations

1. Develop spiritual tour packages coupled with diversified product offerings and adopt spiritual marketing strategies for enhancing brand value among religiously-targeted global population.

2. While most of religious destinations have large arrivals on a daily basis, however the numbers of tourism avenues around these are largely limited. Regions around key religious destinations could be developed with other tourist attraction (Eg: MICE, Wellness, Amusement Park etc.) that can improve the socio-economic development of the region with increased tourist spending.

3. Convergence of schemes like UDAN and PRASAD for strengthening tourist infrastructure such as providing last mile connectivity from major cities across globe.

2.4. Art, Architecture and Cultural Tourism

- Cultural tourism relates to a city's majestic art, fascinating architecture, age-old customs, authentic cuisines, and many more facets. These compelling aspects make up the culture of a place that plays an influential role in developing and boosting the tourism of a particular destination. Cultural tourism differs from recreational tourism in that it seeks to gain an understanding or appreciation of the nature of the place being visited.
- There are various types of Cultural tourism such as Heritage tourism, Cultural thematic tours, Cultural city tourism, Culinary tourism, Traditional & Ethnic tourism and more.
- Cultural tourism in India is the predominant factor behind India's meteoric rise in the tourism segment in recent years, because from time immemorial, India has been considered the land of ancient history, heritage and culture. Its rich culture is reflected in the forms of its philosophy, religion, rites-rituals, festivals, languages, literature, art-architecture, music, dance etc. It is due to the influence of all these various cultures that the heritage and culture of India turns out to be exhaustive and vibrant.

SWOT Analysis

Strength	Weakness
• Culture, Arts and architecture plays holistic role in tourism and economic development as it creates positive image and are catalyst to attract investments and stimulate urban renewal. • India's rich culture and history has resulted in occurrence of several important heritage spots across the country and most of the sites are accessible with last mile connectivity • Arts and cultural groups are strongly networked in order to influence tourism strategy, marketing and development. Increasingly, people want and will travel for unique experiences.	• Lack of skilled manpower in the heritage segment, esp. art & culture interpretors etc. • The upkeep and maintenance of most heritage sites, including WHS is limited.
Opportunity	**Threat**
• A consortium of arts and cultural institutions to market arts and cultural 'products' as tourist attractions • To strengthen the restoration & maintenance activities of all major heritage location in India with effective inter-departmental & ministerial coordination, • Strengthen the tourism amenities and tourism infrastructure around key heritage locations, esp. to cater international tourists.	• Unplanned tourist activity at heritage sites may lead to more damage to these sites. Hence tourism augmentation in these sites also needs to be well planned. • Most of the heritage location need special attention and care in restoration and maintenance.

Key Government Initiatives:

- The Ministry of Tourism in recent years has launched the 'Incredible India' campaign and this has led to the growth of cultural tourism in India.
- Ministry of Urban Development, launched the Heritage City Development and Augmentation Yojana (HRIDAY) scheme, with a focus on holistic development of heritage cities. HRIDAY scheme with budget of ₹ 500 cr is being implemented in 12 identified cities namely, Ajmer, Amaravati, Amritsar, Badami, Dwarka, Gaya, Kanchipuram, Mathura, Puri, Varanasi, Velankanni and Warangal. The Scheme supports development of core heritage infrastructure projects which shall include revitalization of urban infrastructure for areas around heritage assets identified.
- The Government of India has set up seven Zonal Cultural Centres (ZCCs) with headquarters at Patiala, Nagpur, Udaipur, Allahabad, Kolkata, Dimapur and Thanjavur to protect, preserve and promote various forms of Performing Arts namely Music, Dance, Folk art and culture throughout the country.
- Government of India has nominated 44 new places to be included in UNESCO's list of 'World Heritage Sites'.
- Government of India has initiated National Mission on Cultural Mapping and Roadmap with an objective of preserving Indian Art and Cultural Heritage and to create strong "Cultural Vibrancy" throughout nation . Apart from this, Government has launched various missions such as Gandhi Heritage Sites Mission, National Mission on Monuments and Antiques, National Mission on Libraries, National mission on Manuscripts and scheme on Buddhist and Tibetan Culture Art.
- To safe Tribal culture, Ministry of Tribal affairs has undertaken various initiatives such as proposal for construction of a state-of-the-art Tribal Museum of national importance at Garudeshwar, Rajpipla in Gujarat State for tribal freedom fighters has been sanctioned during 2017-18.

Key Destinations:

- Among the various states for cultural tourism in India, Rajasthan is the most popular. The state is renowned for many magnificent palaces and forts which showcase the rich cultural heritage of Rajasthan. The various folksongs and music also reflect the cultural heritage of the State.
- Tamil Nadu is also famous for cultural tourism in India, for it shows the Dravidian tradition and culture. It has many temples which mirror the rich cultural heritage of India.
- Uttar Pradesh, too, has a lot of tourist places which also testify to the rich culture of the country. Cities like Varanasi, Agra, Allahabad, Vrindavan and Ayodhya in UP attract large number of tourists for they encapsulate beautiful vignettes of India. Varanasi, a major pilgrimage city in India, is also one of the most visited cultural travel destinations of the country. Situated on the banks of the divine Ganges river, Varanasi is one of the oldest civilized city of the world with major attractions like Kashi Vishwanath Temple, Panchganga Ghat, Dashashwamedh Ghat, Ramnagar Fort, Chaukhandi Stupa, and more.

- Similarly there are various specific cities famous for cultural tourism such as Amritsar, Goa, Delhi and many more.

Suggestive Recommendations:

- Need of synergetic cultural tourism strategies at local, regional and national levels. Arts and culture need to evolve from being static products and passive experiences to being participatory and creative experiences. A consortium of arts and cultural institutions will increase tourist attractions.
- Extend HRIDAY scheme of Government of India may extend the scheme to include other heritage cities in the next phase and also, should be extended for supporting maintenance of previously constructed structures under this scheme.
- Strengthen the tourism amenities and tourism infrastructure around key heritage locations, esp. to cater international tourists.

2.5 Fair and Festival Tourism

- India is worldly known as a land of vibrant celebrations. One can see rich culture and heritage of India during the celebrations of various fairs and festivals, being celebrated with high spirit and zeal in each and every corner of the country.
- All Indian fairs and festivals have lots of diversity according to the culture, lifestyle, and religion of respective region and hence forms true window for inbound tourists to experience the deep roots of art and traditions of India.

Strength	Weakness
• Community engagement – preservation of culture and heritage • Round the year tourism • Culture and Heritage of India is in itself a major brand to attract tourists.	• Brand building of fairs and festivals take long time to attract inbound tourists compare to other products. • Lack of dedicated festive tour packages. • Lack of other engagement activities in most of the festivals. • Mass gatherings – mostly unplanned activities.
Opportunity	**Threat**
• Development of infrastructure such as budget hotels as locations of famous fairs and festivals are mostly tier 2/3 less known cities/towns.	• Most of the location need special attention and management for catering such huge gatherings. • Lack of security and safety as per international standards

Key Government Initiatives:

- The Ministry of Tourism provides financial assistance to State Governments/Union Territory (UT) Administrations for organising fairs, festivals and events for the promotion of Tourism under its Domestic Promotion and Publicity including Hospitality (DPPH) - Fairs, Festivals and Tourism Related Events Scheme Guidelines. A total amount of ₹ 1082.22 Lakhs has been sanctioned to 28 states as total financial assistance provided for organising Fairs, Festivals and Tourism Related Events during 2016-17 and 2017-18.
- Ministry of Culture operates Scheme for promotion of International Cultural Relations under which Festivals of India are organized showcasing folk art and other cultural events as exhibitions, dance, music, theater, food fest, literary fest, film fest, yoga etc. Under this scheme, Ministry of Culture also gives grant in aid to Indo-Foreign Friendship Cultural Societies for organizing programmes & activities including folk art &other cultural activities for their promotion abroad. Organizing festivals of India and supporting Indo foreign friendship cultural societies abroad is a regular activity of Ministry of Culture.
- A large number of festivals and fairs are held in Rajasthan such as the Camel festival, Marwar festival and Pushkar festival. All these attract many tourists to Rajasthan for they get to see the rich culture of the state.

Key destinations: Various key festivals across India which attracts large inbound tourists are:

- Surajkund Crafts Mela (Haryana) - A delightful handloom and handicrafts fair held annually at Surajkund, Faridabad. Skilled artisans from all over the country display the rich crafts tradition of India in the typical setting of a rural Indian marketplace. Cultural programmes and rural cuisine are also a part of this colourful fair.
- Desert Festival (Rajasthan) - A three day long extravaganza of colour, music and festivity at the golden city of Jaisalmer. Fair and fire dancers swaying to traditional tunes, Camel rides and folk dances at the sand dunes are prime attraction of the occasion for inbound tourists.
- Taj Mahotsav (Agra) - A ten day event that starts on 18th February each year in Shilpgram, displaying India's extensive arts, crafts and culture. Folk music, shayari and classical dance performances along with elephant and camel rides, add to the excitement of the occasion.
- Goa Carnival (Goa) - Goa's 100 km coastline has some of the world's most beautiful beaches. The exuberant week long Goa Carnival is an annual feature here held in mid-February.
- Holi (Mathura and any other places) - The festival of colours is celebrated all over North India during spring. People smear each other with coloured powder, singing and dancing add to the gaiety of the occasion. The Rang Gulal Festival is celebrated for over a week with exuberant processions, songs and music. Especially famous is the Lathmaar Holi of Barsana and Nandgaon.

- Pushkar Mela (Rajasthan) - Tranquil Pushkar is transformed into a spectacular fair ground for twelve days in the month of Kartik. Trading of cattle, camel races and dazzling displays of bangles, brassware, clothes, camel saddles and halters are the major attractions of this colourful event. Devotees come in their thousands to take a ritual dip in the lake on the day of the Kartik Purnima and to worship at the Brahma temple.

Suggestive Recommendations:

- Dedicated image building strategies for fairs and festivals branding specifically targeting inbound tourists.
- Aggressive social media marketing and engaging bloggers and photographers through competitions.
- Increase other engagement activities in most of the festivals.
- Strengthen the tourism amenities and tourism infrastructure around key heritage locations, esp. to cater international tourists.

2.6. Adventure and Sports Tourism

- Adventure Tourism is one of the emerging segments of travel in India as country's varied geographical and climatic conditions offers excellent opportunity for adventure sports. The Ministry of Tourism extends Central Financial Assistance to State Governments/Union Territory Administrations for the development of tourism projects including Adventure Tourism.
- The immense scope of adventure tourism in India is largely because of its diverse topography and climate. In recent times, the popularity of adventure tourism has increased profoundly. Adventure sports such as river rafting, rock climbing, mountaineering, trekking, skiing, snow climbing, scuba diving and angling can be undertaken at multiple location in India. The trans Himalayan region, the Garhwali and Kumaon mountains, the Western Ghats, deserts of Rajasthan, Andaman and Lakshadweep islands are some of the most popular destination for adventure tourism.

SWOT analysis:

Strength	Weakness
• India is a land of rich geographical diversity that offers special adventure zones across the country. • India is round-the-year adventure destination due diverse topography and climatic zones • India's diverse cultures are also home to various forms of Art, Craft, Cuisines, Dance forms, Festivals etc. • Presence of important mountaineering & adventure institutions and the Indian Mountaineering Foundation.	• Not every adventure destination has adequate infrastructure and basic amenities including safety amenities • Adventure destinations are yet to be effectively integrated in standard tourism marketing & promotional activities • Non availability of adequate authorized/ accredited adventure tour operator to cater to the requirements of inbound tourists.

Opportunity	Threat
• To develop basic connectivity infrastructure and tourism amenities in the Adventure tourism segment of India • To aggressively market & position India as an Adventure destination of global repute • To augment the Adventure eco-system in India with increased dedicated service providers • India is yet to attract any flagship global scale theme park.	• Most of the adventure zones are in ecologically sensitive zones & pristine environment, hence need cautious sustainable development • Safety is a top concern in Adventure tourism and the destinations need to be adequately equipped with safety and emergency response mechanisms

Key Government Initiatives

- The Ministry of Tourism has recognized 'Adventure Tourism' as a 'Niche Tourism' product to promote India as a 365 days' destination and attract tourists with specific interest. A Task Force on Adventure Tourism has been set up in October 2016 to act as a forum for resolving issues related to development and promotion of Adventure Tourism in the country.
- The Ministry of Tourism has decided to promote 2018 as the 'Year of Adventure in India'. Apart from the above, Adventure Tourism is regularly highlighted for promotion as part of the Incredible India Campaign in the print, electronic, online and outdoor media in India and abroad as well as at the various travel trade exhibitions overseas.
- To infuse sports culture and achieve sporting excellence in the country and to encourage sports all over the country, Khelo India Scheme has been revamped and launched with specific verticals for development of sports at community, school and University.
- Ministry of Tourism has formulated a set of guidelines on Safety and Quality Norms on Adventure Tourism as "Basic Minimum Standards For Adventure Tourism Activities".
- Central Financial Assistance is being extended to various State Governments/ Union Territory Administration for development of Tourism Infrastructure in destinations including Adventure Tourism destinations.
- The Government of India has given security clearance for opening of 104 additional peaks in Jammu and Kashmir (Leh Area) subject to stipulations and clearances form State Govt., Home Ministry and other concerned agencies. The opening of the additional peaks will help in positioning the Indian Himalayas as Adventure tourism destination.
- The Ministry of Tourism has launched the Swadesh Darshan Scheme for Integrated Development of Theme-Based Tourist Circuits for development of tourism infrastructure in the country including for the Wildlife Circuit under which following two projects worth ₹ 187.89 Crore has been allotted:

Circuit	State	Project Name
WILDLIFE CIRCUIT	Madhya Pradesh	Development of Wildlife Circuit at Panna- Mukundpur- Sanjay- Dubri-Bandhavgarh- Kanha- Mukki- Pench in Madhya Pradesh.
	Assam	Development of Manas– Probitora– Nameri– Kaziranga– Dibru– Saikhowa as Wildlife Circuit in Assam.

Key Destinations

State	Destination
Jammu & Kashmir	Leh, Sangam, Zanskar, Chilling, Spituk, Nimo, Lamayuru, Markha, Stok Kangri, Nubra, Sam, Tsomoriri, Sonamarg, Pahalgam, Srinagar, Kargil, Gulmarg, Yusmarg, Doodhpathri, Veriag, Kokerag, Manasbal, Lolab, Gurez, Pangong, Hemis National park.
Himachal Pradesh	Kullu, Manali, Solang Valley, Bir Billing, Dharamshala, and LahaulSpiti, Chamba, Kangra, Kufri, Narkanda, Hanuman Tibba, Rohtang Pass, DeoTibba and Chandrakhani Pass, Chil&Dalhousi
Uttarakhand	Rishikesh, Mussoorie, Pithoragarh, Nainital, Dhanaulti, Naukuchiatal, BedniBugyal, Auli, Mundali, Munsiyari, DayaraBugyal, Jim Corbett National Park, Raja ji National park, HarKi-Doon& Kana Tal.
Maharashtra	Chandrapur, Alibag (Kashid), Kolad, Tarkarli, Ganpatiphule, Kamshet, Punchgani, MalshegGhat, Karjat, Mahableshwar, Matheran, Panhala Fort, Chikhaldhara, Rajmachi
Madhya Pradesh	Bandhavgarh, Panchmarhi, Kanha National park, Shivpuri, Pench, Panna, Satpura, Kerwa lake, Orchha, Pipariya, Bargi dam, Jabalpur, Betwa, Narmada river side, Bhopal &Tikamgarh
Goa	Calangute, Mogore, Candolin, Palolim, Novem, Arpora, Divar island, Bagha, Grande island, Sao George island, Arambol, Benaulim, Chapora river, Valpoi river, Choraopomburpa, Dudhsagar fall Mullem national park, Cotigaon wildlife, Monkey beach, Britona & Bhagmalo
Kerala	Kochi, Thiruvananthapuram, Munnar,Varkala Beach, Payyambalam Beach and Alappuzha Beach, Agasthyakoodam, Eruthavoor, Thenmala,Periyar wildlife sanctuary, Wayanad wildlife sanctuary, KovalamVagamon, Varkala, Idukki, Kozhikode, Ponmudi & Kasargod.
Karnataka	Bangalore, Mysore, Mangalore, Ramanagara, Dandeli, Coorg, Gokarna, Karwar, Anthrange, Bheemeshwari, Devarayanadurga, Madhugiri, Nandi hills, Shivaganga, Mullayanagiri, Brahmagiri, Tadiyadamol, Dubare, Murudeshwara, Malpe & Murudeshwar

Arunachal Pradesh	Nam-da-pa, Bomdila,-Tawang, Kameng, Sepa, Bhalukpung, Subansiri, Sing, Dibang, Along, Daporijo, Pasighat&Mechhuka
Assam	Bhalupung, Kaziranga National Park, Nameri, Manas National Park, Samuri, Dibrugarh, Tezpur, Bhoroli, Kapili, Ninging, Dhubri, Hajo, Saulkuchi, Barpeta, Guwahati, JiaBhoroli, Cachar Hills, Karbi Hills, Kamakhya Hills, Orang National Park, Sonai Rupai Wildlife Sanctuary, Milroy Sanctuary, Laokhowa Wildlife Sanctuary, Pobitora Wildlife Sanctuary, Namber Wildlife Sanctuary &Pani Dihing Wildlife Sanctuary.
Sikkim	Dzongory, Lavataru in North Sikkim, Green Lake, Banjari Waterfalls, Rangpumali, Sleep Junky, RangpoMalli, FambongLho, Kanchendzonga, Pemayangtse, Khechopalri, Yuksum, Tsokha, Dzongri, hangshing, Zemathang, Chaurigang, Tashiding, Varsey, Yangang, Rabongla, Sang & Sikip, Makha, Sirwani, Bardang & Goechala

Suggestive Recommendations:

- Safety and security is a major concern area that needs to be ensured for any adventure destination. Towards this all Adventure destinations need to be equipped with adequate safety measures including availability of emergency response teams for prompt action, air services for evacuation etc.
- Capacity building and training of locals and stakeholders for disaster management.
- A dedicated help line needs to be setup for handling emergencies that ensured confidence of adventure enthusiasts.
- Most of the adventure destinations are in remote locations hence it is imperative to involve the community for developing various support systems, such as Home Stays.



3

Policy initiatives of leading states in promoting Inbound Tourism



Policy initiatives of leading states in promoting Inbound Tourism

3.1 Rajasthan

Tourism Potential	• Rajasthan lies on elementary location of the Golden Triangle and has presence of 3 UNESCO World Heritage Sites - Keoladeo National Park, Jantar Mantar, Hill Forts of Rajasthan. • 09 prominently identified Tourism circuits - Desert Circuit; Mewar Circuit; Vagad Circuit; Dhundhar Circuit; Godwar Circuit; Merwara-Marwar Circuit; Brij-Mewat Circuit; Shekhawati Circuit and Hadoti Circuit.
Policy Highlights	• Exemption from land conversion charges and development charges • Land Allotment in Urban and Rural areas at DLC Rates • 25% additional exemption from payment of stamp duty chargeable on the instrument of purchase or lease of more than 100 years old heritage property in the state • B2B and B2C marketing strategy • 50% exemption on Conversion Charges • Film Shooting Regulation Simplified - Grant of Permission in 15 days with waiver of all fees • All registered Tourism Units will directly become training partners under the Employment Linked Skill Training Program
Key Recent Initiatives	• A single window clearance system (SWCS) for investment approvals is operational in the state and the Bureau of Investment Promotion (BIP) set up to focus on investments above ₹ 13 Cr. • Development of Eco-tourism in Hanumangarh, Udaipur, Chittor, Pali, Jaipur, Kota and Dholpur in PPP mode. • Launch of new tourism marketing campaign 'Jane kya Dikh Jaye' revamping the brand image of Rajasthan Tourism • The State operates famous luxury tourist trains such as Royal Rajasthan on Wheels and Palace on Wheels, which connect some of Rajasthan's key tourist destinations to other states. • Various projects sanctioned under Swadesh Darshan scheme are Desert Circuit (₹63.96 Cr); Krishna Circuit (₹ 91.45 Cr); Spiritual Circuit (₹ 93.90 Cr) and Heritage circuit (₹99.60 Cr) and project approved under PRASAD scheme is Integrated development of Pushkar/Ajmer (₹ 40.44 Cr)

3.2 West Bengal

Tourism Potential	• West Bengal is the only State in the country to have the icy snow bound Himalayas in the north, Bay of Bengal at its south and temperate plains and plateaus covering the remaining region • UNESCO World Heritage Sites: Darjeeling Himalayan Railway, Sundarbans National Park • Visva-Bharati founded by Asia's first Nobel Laureate Rabindranath Tagore is a pilgrimage for education and culture
Policy Highlights	Strategies will be adopted for optimal use of existing resources to achieve a responsible and beneficial balance in the long term New destinations are to be identified with backward and forward linkages and develop these into proper tourism products Increase the availability of branded hotel accommodation room in the State to 10000 by 2020 State Capital Investment Subsidy ranging from 7.5%-25% subject to a limit of ₹175 lakhs 50%-70% reimbursement of Stamp Duty and Registration fee Waiver of electricity duty for a period of 5 years 50%-75% of the annual interest liability on term loan borrowed from Financial Institution subject to a max limit of ₹30 lakhs for 7 years.
Key Recent Initiatives	• Preparation of a comprehensive database of all tourism facilities within the State including hotels, resorts, tour operators amongst others to facilitate certification and standardization • Launched 'Atithi Bondhu' initiative where 200 young people from Hospitality Schools are endorsed on web following to guide tourists • Planned to set up around 49 helpdesks or kiosks at different locations, right from the prominent tourist destinations to important transit points • Released Homestay Tourism Policy 2017 to offer alternative livelihood option for local communities • Intensive promotional campaign ranged from commercials in TV FM, Social Media to participation in almost all major trade fairs and festivals at National and International level

3.3 Gujarat

Tourism Potential	• Gujarat is renowned for its beaches, temple towns, Sculptures, handicrafts, festivals and historic capitals. Also wildlife sanctuaries, hill resorts and natural grandeur are state's major attractions including the only habitat of the Asiatic Lions in India (Gir Forests), The colorful tribal villages of Kutch and religious place and Gandhi Circuit has been developed which includes ashrams, statues, museums, etc.
Policy Highlights	• Tourism Policy for the state of Gujarat (2015-2020) - Attract more tourist through MICE tourism and leverage innovative forms of tourism such as adventure, cruise, event-based, inland waterways, medical etc. o 100% Reimbursement of Registration Fee/Stamp Duty o Capital Subsidy 15% (subject to a ceiling of Rs. 20 Crore) o Additional 5% Capital Subsidy for women entrepreneurs, SC/ST category & differently abled o Interest subsidy 5% Municipal Corporation areas for eligible tourism units and 7% for Heritage Hotels o Luxury Tax, Entertainment Tax & Electricity Duty Exemption for a period of 7 years • **Gujarat Eco-Tourism Policy** - Department of Forest & Environment, Government of Gujarat has developed an Ecotourism policy which was approved by the Government in 2007 • **Gujarat Film Policy** - A separate single window clearance desk to assist filmmakers scout locations and extend logistic support • **Home-Stay Policy 2014** - The Gujarat Government unveiled 'Home-Stay' policy aimed at providing extra income to locals by allowing them to rent their rooms to tourists • **Regulation for Hotel and Mixed Use Development 2016** - Policy is aimed at encouraging building more taller hotels to create world class facilities for tourists and business travelers coming to Gujarat.
Key Recent Initiatives	• Promotion of quality and popular Gujarati films through financial assistance to Gujarati film producers and Prize Money for Gujarati Films that win national award or gain international acclaim • Development of Greenfield Properties - Tithal, Chorwad, Kutch Mandvi, Shivrajpur, Bhavnagar, Jamnagar, etc. • Organises various fairs and festivals such as International Kite Festival, Rann Utsav Festival, Travel Trade Journal Jury Choice Awards 2016, • Received Readers' Travel Awards 2015 by Conde Nast Traveller India Magazine – 2nd Prize for Favorite Emerging Indian Destinations • Redevelopment of Nalsarovar Area and Ajawa Theme Park

3.4 Madhya Pradesh

Tourism Potential	• Presence of 3 UNESCO World Heritage Sites – Khajuraho Group of Monuments, Rock Shelters of Bhimbetka; Buddhist Monuments at Sanchi and has rich natural heritage with 10 national parks, 25 sanctuaries, 6 project tiger reserves, 2 Shiva Jyotirlingas • Dedicated Tourist Circuits – o Gwalior - Shivpuri - Orchha - Khajuraho o Indore - Ujjain - Maheshwar - Omkareshware - Mandu o Jabalpur - Bhedaghat - Mandla - Kanha - Bandhavgarh o Bhopal -Sanchi - Bhojpur - Bhimbetka – Panchmarhi
Policy Highlights	• Subsidy for Heritage Hotels: 35 % capital subsidy subject to maximum ceiling limit of ₹ 1.5 crore will be provided for renovation of the property. • Existing properties like Garhi, Forts, and palaces/buildings etc. which come under the heritage category which had been used at least in part as heritage hotels earlier with a minimum investment of ₹ 50 lakh shall also be exempted from Luxury Tax for a period of 10 years for the extended portion only. • Budget hotels on land provided by MPSTDC from their land bank will be entitled to 10% capital subsidy subject to a maximum ceiling of ₹ 50 lakh. • Budget hotels on privately owned land, will be entitled to 20% capital subsidy subject to a maximum ceiling of ₹ 50 lakh. • 100% Exemption from Motor Vehicle Tax for 5 years. • MPTDC has identified 16 tourism zones to attract investors to tourism sector in Madhya Pradesh. Additional subsidy and exemptions are being given in these zones.
Key Recent Initiatives	• Various projects sanctioned under Swadesh Darshan scheme are Eco- Circuit (₹99.62 Cr), Wildlife Circuit (₹ 92.22 Cr), Buddhist Circuit (₹ 74.94 Cr) and Heritage circuit (₹ 99.77 Cr) and project approved under PRASAD scheme is development of Omkareshwar (₹ 40.67 Cr) • District Tourism Promotion Council has been constituted in 22 districts and MP Institute of Hospitality and Training set up by the Department of Tourism at Bhopal organizes vocational trainings • Many innovative initiatives have been taken to provide attractive facilities to tourists including rail-coach restaurant, caravan tourism, suspension bridge (Sair-Sapata), QR Code Facility etc.

3.5 Odisha

Tourism Potential	• UNESCO World Heritage Site: Sun Temple, Konark • Heritage and Culture: Shree Jagannath temple, Udayagiri, Pushpagiri Vihara, Ratnagiri • Nature & Wildlife: Chilika Lake, Bhitarkanika, Gahirmatha, Nandankanan • Beaches: Puri, Gopalpur, Chandipur, Ramachandi, Balighai, Baliharachandi.
Policy Highlights	• Encourage domestic & foreign private investment to participate in joint venture or in Public Private Partnership (PPP) mode for development of long term infrastructure in the tourism sector • Identification of suitable land parcels in important tourist locations for development of tourism projects • Highest priorities shall be accorded to ensure healthy & sanitary conditions in all important pilgrim centres & tourist locations beaches • For speedy clearance of tourism projects single window clearance authority has been created which will issue deemed approvals • Interest Subsidy of 5% per annum subject to maximum of ₹ 1 crore for 5 years • Capital Investment Subsidy ranging from 20%-30% subject to a limit of ₹ 15 Crore • 100% exemption in Stamp Duty on purchase of land • 100% reimbursement of the land conversion charges • 100% reimbursement of entry tax on acquisition of plant & machinery till the date of commercial operation • 75% of the actual expenditure incurred on accommodation in hotels of Odisha during film shooting shall be reimbursed subject to a ceiling of ₹ 10 Lakh
Key Recent Initiatives	• Agreement with Air-Asia to commence direct international flights to Malaysia, to promote in bound tourism in Southeast Asia • Introduction of new tour packages such as Coastal Trek, Jagannath Trail, Weekend Gateways, Cycle Tours, Coastal Cruise, amongst others • Promotion of cruise tourism by introducing modern cruises ships and holiday packages to harness the potential of vast coastline • Participation at world's leading travel trade show ITB Berlin 2018 • Identification of 35 destinations close to nature for promoting nature tourism.

3.6 Telangana

Tourism Potential	• Heritage: Charminar, Qutub Shahi Tombs, Paigah Tombs, Falaknama Palace, Chowmahalla Palace, Golconka Fort, Khammam Fort, Warangal Fort and Bhongir fort • Religious: Ramappa Temple, Bhadrachalam, Alampur Jogulamba Temple, Medak Church, Keesara Temple, Basara, Thousand Pillar Temple and Yadigirigutta Temple • Forest and Recreation: Nehru Zoological Park, Etunagarm wildlife sanctuary, Nagarjuna – Srisailam Tiger Reserve and Pocharam sanctuary • Nature: Kuntala waterfalls, Pochera waterfalls, Laknavaram, Bogatha waterfalls, Mallela Thertham waterfall and Ananthagiri hills
Policy Highlights	• The State Government is coming up with the New Tourism Policy to encourage investments in the Tourism and Hospitality Sector.
Key Recent Initiatives	Government of Telangana is planning the following circuits for overall tourism development: • Hyderabad Heritage Circuit: The Qutb Shahi Heritage Park, located close to famous Golkonda Fort in Hyderabad shall be developed as Hyderabad Heritage Circuit. The park contains tombs and mosques constructed by various rulers of Qutb Shahi dynasty during 16th – 17th centuries making it a unique necropolis in India. • Tribal circuit in Jayashankar Bhoopalapally district: This circuit covers the major Tirbal belts. The region is blessed with a soothing river, beautiful lakes, dense forests, a wildlife sanctuary, tribal culture, pilgrimage, heritage structures and architectural monuments, a fi ne blend of new and old. The tribal circuit includes the following places- Mulugu (Tribal), Laknavaram (Tribal), Medaram (Tribal), Tadvi (Tribal & Wildlife), Damarvi (Tribal & Eco Tourism) • Eco-tourism circuit at Nagarkurnool District: This circuit includes the following destinations- Somasila riverside (Religious), Akkamahdevi caves (Eco tourism), Uma Maheshwaram Temple (Religious), Mannur (Eco Tourism), Farahbad (Eco tourism), Mallela Theertham waterfalls (Eco tourism) and Srisailam (Religious) • Tribal & Eco-tourism Circuit in Adilabad, Nirmal and Kumarambheem-Asifabad Districts: This circuit includes the following places – Dichpally (Heritage), Shyamgadh fort (Heritage), Koratikal waterfall (ecotourism), Kuntala waterfall (Eco Tourism), Mysterious caves (religious & ecotourism)

3.7 Goa

Tourism Potential	• Famous for its beaches, places of worship and casinos with wide range of offerings easily reachable due to short distances • The Churches and Convents of Goa have been declared a World Heritage Site by UNESCO
Policy Highlights	• Draft Goa Tourism Policy, 2016 prepared , • Tourism has been declared as an industry in the state • Has separate water sports Policy and Boat Rides & water sports activities guidelines also has policy for Erection of Beach Shacks, Temporary seasonal structures, huts and others • GTDC focus on developing and promoting Goa's tourism sector with a thrust on privatization and outsourcing of its assets. • Ensure that the local community is involved and the benefits of tourism accrue to them.
Key Recent Initiatives	• Introduction of e-commerce portal and mobile app to sell hotel rooms and other pioneering activities and giving boost to cashless transactions and first Govt. organization to go completely cashless. • Launched motorized paragliding at Mandrem beach to boost adventure tourism • Plan to launch other adventure activities like new activities like duck boats, seaplanes, segway tours, hop on hop off tours, horse riding trails, bungee jumping, scuba diving, rope way, etc. • Focusing on introducing activities and initiatives to promote tourism for families through watersports activities, hot air balloons and helicopter joy rides • Constructing a state of the art convention centre to facilitate conventions and corporate events to promote MICE tourism. • Goa Tourism also organises events and festivals throughout the year like Grape Escapade, Carnaval, Shigmo, Food and Cultural Festival, the International Film Festival India – Goa, Tripurari Purnima, Ganesh Chaturti, Diwali, Christmas, NYE, Monsoon festivals

3.8 Jammu and Kashmir

Tourism Potential	• 6 Mughal gardens under tentative list of UNESCO World Heritage Sites, also are Cold Desert Cultural Landscape of Ladhakh region and The Neolithic Settlement of Burzahom. • Most prominent tourist places are Kashmir, Srinagar, the Mughal Gardens, Gulmarg, Pahalgam, Jammu, and Ladakh. • Based on the religious diversity of the state the identified circuits are Sufi circuit, Buddhist Circuit and Shiva circuit.
Policy Highlights	• The state government is in process to formulate new tourism policy for the state and has adopted a multipronged strategy to position Jammu and Kashmir as the leading global destination. • As per draft policy, all the destinations would be classified into three categories based on the development of the destination. "A" - (developed), "B" - (developing) and "C" - (underdeveloped). o Projects / activities/ units classified as Category C (most backward) will be given priority in incentives. o New tourism units would be eligible for incentive schemes. • Incentives and technical assistance will be provided to SMEs in the tourism sector, notably unemployed professional youths and local artisans producing high quality local handicrafts. • Feasibility studies for establishing demand for various tourism facilities, such as rural tourism, MICE Tourism, Adventure tourism etc will be undertaken • Three year Event Calendar will be developed which would be synchronized with other themes and Business Events to attract tourists and extend duration of stay of visitors. • Separate Eco-Tourism Policy to protect the aesthetic landscapes in the state.
Key Recent Initiatives	• 06 projects sanctioned under Himalayan Circuit of Swadesh Darshan scheme worth ₹ 569.73 Cr) and project approved under PRASAD scheme is development of Hazratbal (₹ 42.02 Cr) • In an effort to boost tourism in three regions, J&K's Government is planning to construct several ropeways in the state. • Several new projects, such as cable car projects from Peerkho to Mahamaya, Mahamaya to Shahabad in Bahu Fort and one at Patnitop, are in the pipeline. • Planning to develop around 14 new tourist destinations across the state, also launched aero ballooning to boost the influx of tourists.

3.9 Maharashtra

Tourism Potential	• UNESCO World Heritage Sites – Ajanta, Ellora and Elephanta Caves, Western Ghats of Maharashtra and Chhatrapati Shivaji Terminus • Mumbai - home to Bollywood, one of the biggest film industries in the World. • Encompasses beaches, caves, forts, wildlife, heritage sites, hill stations and religious destinations.
Policy Highlights	• Single-window clearance mechanism for the Hospitality industry & Live Events backed by an empowered committee. • Facilitation cell which will act as a converging body to monitor the sector progress. • 3 tier Institutional set up to promote Tourism investments: Steering Committee for facilitating investments in the state; High Powered Committee for approving Mega Projects; A District Tourism Promotion Committee (DTPC) • FSI for Mega/Ultra Mega projects: 1.0 – 80% for tourism, 20% for support infra. Additional FSI of up to 50 % will be given to all MSME projects. • No increase in water charges for a period of 10 years except urban area • Lodging house license, eating house license, Police permissions, license under the Shops & Establishment Act, and license under the Food & Drug Admin. - renewal every 5 years • Concessions on Luxury Tax, Entertainment Tax, Electricity Duty, Stamp duty and registration charges. • Increased focus on Mega and MSME tourism units. Offer additional incentives to employment-intensive Mega units. • Agro & Rural, Adventure sports, events based tourism activities etc. identified as thrust sector • Leverage state and central skill development scheme • Mahabhraman Scheme to promote Experiential Tourism

3.10 Punjab

Tourism Potential	• Presence of 3 RAMSAR Wetlands – Harike Wetlands, Kanjli Wetlands and the Roopnagar Wetlands and 2 National Wetlands - Ranjit Sagar and Nangal • Circuit Touring – Heritage Circuit, Mughal Circuit; Maharajah Circuit; Sufi circuit; Amritsar Circuit; the Patiala Trail, the Ludhiana Circuit; the Chandigarh Circuit; the Nature Circuit; the Ferozepur Circuit (comprising the Indo-Pak frontier trail).
Policy Highlights	• Collaboration with multilateral agencies such as UNWTO, ADB for technical assistance • Single window clearance for film shootings • Separate State Culture policy to promote heritage and culture of the state. • The policy deals with various aspects of tourism, including human resource development, marketing and promotion, rural tourism and infrastructure development, medical tourism, heritage tourism and film tourism. • The policy envisages investment promotion in the field of tourism through an investment portfolio for the information and motivation of potential investors. The state government's investment portfolio would include projects pertaining to accommodation, transport, organization of conducted tours, conferences and conventions, and related fields. • Focus on Infrastructure and Superstructure Development • Marketing and promotion campaigns would be primarily thematic in nature and based on themes such as "Trace your Roots", "Punjab Retreat", "Taste Punjab", "Punjab in Style", "Festive Punjab", and "Punjab Agritours", Out of India road shows. • The State would continue to provide fiscal and monetary incentives to the investors such as treating tourism at par with other industries (tourism as an industry).

3.11 Andhra Pradesh

Tourism Potential	• Religious: Tirupati, Srisailam, Annavaram, Srikalahasti • Hills and Valley: Aaraku, Horsley hills, Gandikota, Lambasingi • Rivers & Backwater: Papikondalu, Dindi backwaters, Coringa • Beaches: Rushikonda, Bheemili, Manginapudi, Suryalanka, Chirala • Sanctuary & wildlife: Srisailam, Pulicat, Kolleru and Nellapatu • Caves: Belum caves, Borra caves, Undavalli caves, Yaganti
Policy Highlights	• Fiscal incentives: o Automatic land conversion, 100% reimbursement of registration and stamp duty, Reduce rate of energy tariff, Investment subsidy based on investment size. • Non fiscal incentives: o Complimentary / linkage infrastructure for eligible projects, Single desk approvals, marketing supports, special incentives for all incentives over USD 33 Million • Land lease policy: o Land Lease Policy is applicable for tourism projects where land requirement is less than 10 Acres o Lease period – 33 years+ 33 years ; o Upset price- 2% of basic market value o Conditional land lease agreement
Key Recent Initiatives	Government of Andhra Pradesh has planned many tourism initiatives by envisaging following tourism projects • **INS Viraat:** The project is envisaged to be developed in PPP mode. The project will be developed to have 5 star hotel, convention center, gaming zone and museum. • **Havelock Bridge:** Havelock bridge is located in Rajahmundy. It is one of the biggest bridges with length of 2.7 km that connects east and west Godavari districts. The project is envisaged to be developed with project components such as walkway, shopping zone and view point. • **Development of Bhavani Island and its neighboring island:** The seven island group has 700 acres earmarked for development of entertainment zone, eco zone, wellness resort and retreat zone. It is proposed to have amphitheater, botanical gardens, retail node and wellness and eco resort. The project shall be developed through PPP mode. • **Tourism Development at Madhurwada, Vishakhapatnam:** Government of Andhra Pradesh is planning to develop Madhurwada, Vishakhapatnam in to a tourist destination with 5 star hotel, amusement park, resort and hotels, international convention center and family entertainment center. • **State owned India Tourism Development Corporation (ITDC)** is developing a Mega Tourism Destination project at Bhairav Lanka in Kakinada, East Godavari District of Andhra Pradesh at an estimated cost of ₹ 550 crores

3.12 Chattisgarh

Tourism Potential	• Waterfall: Chitrakote Waterfall, Tirathgarh Waterfall, Rani Dah Waterfall, Ghatarani Waterfalls • Nature & Wildlife: Indravati National Park, Achanakmar Wildlife Sanctuary, Barnawapara Wildlife Sanctuary, Sitanadi Wildlife Sanctuary, Kanger Valley National Park • Pilgrimage and Heritage: Buddha Viharas in Sirpur, Rajim, Mainpat, Champaranya, Bhoramdeo Temple, Danteshwari Temple
Policy Highlights	• To develop communal and social harmony through tourism • To promote holistic tourism in the State from the economic, cultural and environmental perspectives • Promote new ideas in tourism like time shares, eco-tourism, adventure tourism and rural tourism • The policy has outlined that the key focus areas of the state Government are going to be: o Infrastructure and institutional development o Tourism Product Development o Marketing • Boost infrastructure development through public-private partnerships and encouraging private investment • The Government will provide a grant of up to 15%, not exceeding 20 laks for the tourism projects in STAs • The Government will promote and market the state's rich biodiversity like medicinal plants by setting up 'herbal gardens' and promoting ayurvedic resorts and yoga. • The policy will identify specific areas that have natural attractions and develop them into ecotourism attractions that will include wildlife areas, camping and trekking facilities. • The policy also promotes rural arts, crafts and handloom. • The proper and scientific upkeep of historical and archaeological monuments will also be undertaken.
Key Recent Initiatives	• Agreement with Ministry of Civil Aviation to boost regional air connectivity within the state. • Introduction of Tribal Tourism Circuit and Ramayana Circuits will provide an opportunity to the tourists to witness and experience tribal culture and heritage of Chhattisgarh. • Chhattisgarh Tourism Board is also planning to take a series of initiatives for developing 'Highway Tourism' in the State. • Promotion of ecotourism in tribal-dominated areas to put Chhattisgarh as India's biggest eco-tourism hub. • Intensive promotional campaign ranged digital and social media platforms to engage with domestic and international tourists

3.13 Tamil Nadu

Tourism Potential	• Achieved the hat-trick of being the top tourist destination states as per Ministry of Tourism statistics • 5 UNESCO recognized World Heritage Sites - Great Living Chola Temples – Brihadeeswaram Temple (Gangaikonda), Airavateshwarar Temple (Darasuram) and Brihadeeswarar Temple (Thanjavur), Group of Monuments at Mammallapuram and Nilgiri Mountain Railway at Ooty • Chennai has been recently included in the UNESCO Creative Cities Network for its rich musical tradition • Various cities has been selected as the Smart Cities under Smart Cities Mission which opens the opportunity for the tourism development
Policy Highlights	• Soft Loan at the rate of interest of 0.1% p.a. for first five years to pay Sales Tax by the investors of Tourism Projects • Capital Subsidy of 10% for Tourism Projects like Amusement Park, Golf Course, Rope Car and Boat House subject to the max of Rs 01 crore • Capital Subsidy of 10% for Construction of Hotels subject to the max of Rs 25 lakhs (for 1 star), Rs 50 lakhs (for 2 star) and Rs 01 crore (for 3 star and above) • Identifying and developing lesser known tourist centres to decongest the popular destinations • Encouraging private investment in tourism • Setting up of Tourist Security Organization
Key Recent Initiatives	• Eight beaches in five districts of Tamil Nadu have been identified for integrated development of coastal theme tourists circuits, • Mahabalipuram has been identified as one of the iconic tourist destinations among 10 prominent tourists sites in the country, • Conducting Hot Air Balloon Festival (January), Sail & Surf Festival (January, Pongal Tourist Festival (January), Summer Festival (at all important hill stations in May), World Tourism Day (September), Tea & Tourism Festival (November – December), Indian Dance Festival (at Mamallapuram from Decemebr to January), etc. every year to attract inbound tourists. • Publicity through advertisements in international magazines, international and domestic in-flight magazines • Tie-up arrangements have been made with makemytrip.com, yathra.com and travelguru.com for online booking of TTDC Hotels and Tours • Setting up of Tourist Information Centres at Airports, Railway Stations, Bus Stands and outside places like Bengalluru Railway Junction, Hyderabad, Thiruvananthapuram, Ahmedabad and Bhubaneshwar • Operation of helicopter services at important tourist destinations and launch of sea-plane service are few of the innovative projects under anvil



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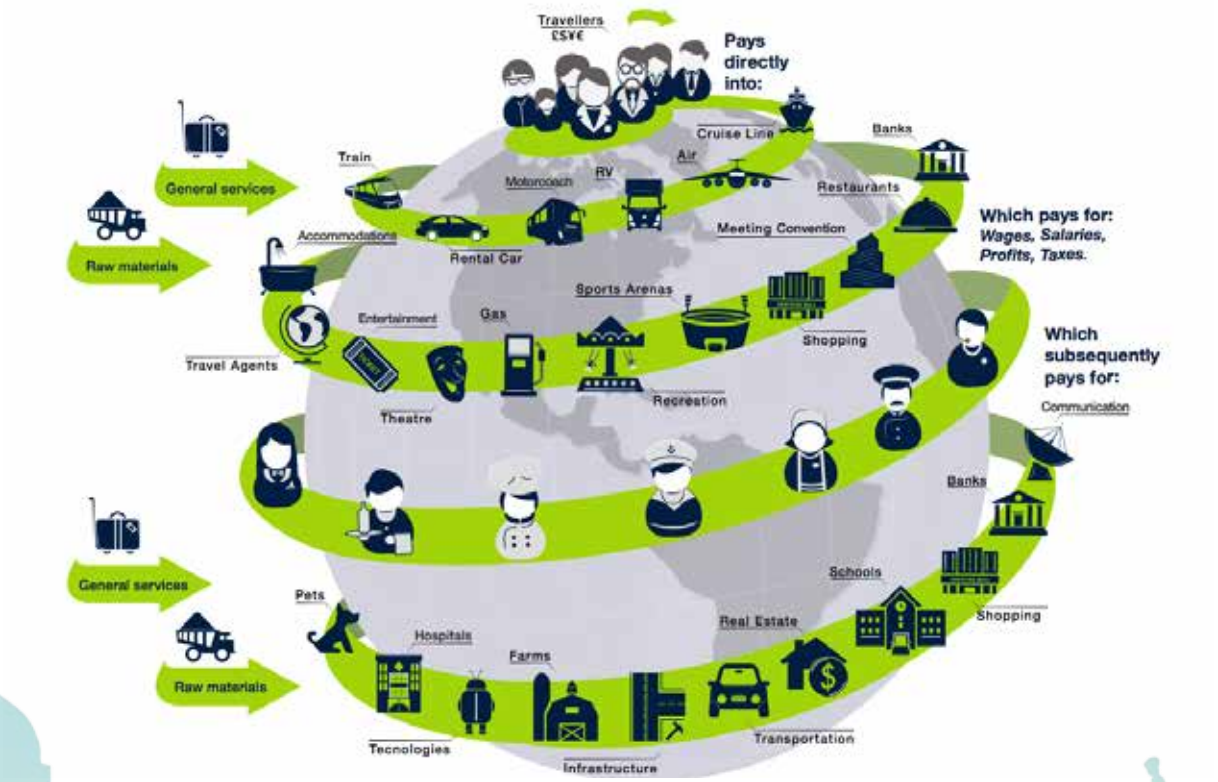
Way Forward



Way Forward

While crossing 10 million foreign tourist arrivals is a momentous occasion for the tourism industry, it is important to acknowledge the fact that this is just the tip of the iceberg, and while the initial growth surge has been fast, continuing this momentum will require a greater degree of policy dynamism as well as heightened synergy between multiple layers of the industry.

Figure 11: Tourism, being an 'umbrella' sector, has significant 'knock-down' effects on almost all aspects of local, sub-regional and national economies



Source: WTTC

Destination infrastructure, connectivity and technology are the key pillars that will drive the next stage of growth in the tourism sector. The following recommendations can spur investor interest, accelerate development of infrastructure to augment existing and create new destinations, and foster equitable growth though skill development and employment generation.

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

2. **Services Exports from India Scheme (SEIS):** Tourism in India accounts for 7.5% of the GDP and is the third largest foreign exchange earner for the country. FEEs during the period January-May 2017 were US$ 11.19 billion with a growth of 21.3%. Given that the forex generated is at par with other industries, Tourism sector should be placed under the Service Exports from India Scheme (SEIS).

3. **Review of Coastal Regulatory Zone (CRZ):** The Coastal Regulatory Zone Regime while preventing commercialization of the waterfront has also been a limiting factor for coastal tourism despite India's long coastline (>7500kms). Local communities in collaboration with the tourism industry can be encouraged to invest and maintain the attractiveness of coastal ecosystems, which will require review of Coastal Regulatory Zone regime to identify and permit eco-friendly activities along waterfronts that can generate new or complement existing economic activities.

4. **Ease of Doing Business (EoDB) in Tourism/ Tourism Competitiveness Index:** "EoDB Tourism State Rankings" can be introduced by MoT & NITI Aayog, where each State (in consultation with Ministry of Tourism) clearly defines and publishes the list of all approvals required by various agencies (including local bodies) for various types of tourism projects. "Single Window" approval facility for tourism projects should be put in place by all states, in coordination with Ministry of Tourism to permit standardization to the extent possible. Ministry of Tourism should also institute standardized format for collection and publishing of tourism data and statistics across states and districts. This will permit easier decision making by investors as also measurement of impact of initiatives taken by various states and other stakeholders.

5. **Land Bank Repository & Investor Facilitation:** Availability of suitable land is one of the main concerns for investing in tourism projects. One way to tackle this can be developing more tourism specific land banks, made accessible over an interactive web platform like Google Earth. This will enable the investor to assess the preliminary viability of their projects basis the nature of land parcel without physically visiting the site in the initial stages. This needs to further bolstered by appointing a nodal officer/ land officer to facilitate investor site visits and address queries from 'Inception to Commissioning'.

6. **Travel Tech Startups:** Tourism today is all about adopting technological advancements to enhance service and information delivery. Companies like Uber and TripAdvisor have shown how modern technology can completely transform the industry landscape. We need to support emergence of Indian Startups in this space.

7. **PPP to Revitalize Government Infrastructure:** State Tourism Departments can make an assessment of various state Owned Tourism Units that are not being utilized and identify the units which can be operated on suitable PPP models.

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