FICCI

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Inbound Tourism in India

Unlocking the Potential







Foreword

As the world becomes increasingly connected, the tourism industry has become a major driver of economic growth and cultural exchange. India, with its rich history, diverse cultures, and stunning natural beauty, has emerged as one of the most sought-after destinations for travellers from around the world.

The COVID-19 pandemic has had a severe impact on the tourism industry, including inbound tourism in India. However, the Government has been actively working towards facilitation as well as strengthening of tourism sector. The tourism industry has undergone a significant transformation, with the government's focus on improving infrastructure, promoting sustainable tourism, and showcasing the country's unique attractions to the world. This has resulted in a surge of inbound tourism, with millions of travellers from across the globe choosing to visit India each year.

Recently the government has taken several initiatives to increase the inflow of tourists, such as revamped its Swadesh Darshan Scheme as Swadesh Darshan 2.0 (SD2.0), launched National Mission on Pilgrimage Rejuvenation and Spiritual, Heritage Augmentation Drive (PRASHAD) Scheme, enabled 24x7 toll free Multi-Lingual Tourist Helpline, providing facility of e-Visa, developing, and promoting 'Niche Tourism' products, promoting through social media handles and website etc. With India's G-20 Presidency, the tourism sector is providing an unparalleled opportunity to highlight India's tourism offerings and share India's success stories on the global stage. The five prioritized areas, Green Tourism, Digitalization, Empowering youth with skills, Tourism MSMEs, and Destination Management are the building blocks for accelerating growth of tourism sector.

The Great Indian Travel Bazaar (GITB) is cherry on the top, as it plays a vital role in promoting India as a premier tourism destination. The 12th edition of GITB'23 is once again providing an opportunity for Buyer-Seller Meet, promoting India's diverse tourism offerings and strengthening business relationships within the industry.

Our objective is to invite all who are passionate about India's tourism potential, to come together and unlock the opportunities that lie ahead. By working together, we can create a tourism industry that not only showcases the best of India to the world but also enriches the lives of the local communities and preserves the country's cultural and natural heritage for generations to come.

I am pleased to present the FICCI – Nangia Andersen LLP Knowledge Report 'Inbound Tourism in India- Unlocking the potential'. I am sure the content of this report will be very insightful for all the players of tourism industry. The report highlights the present scenario of Inbound tourism in India, the initiatives being undertaken by the Central & various State Governments to boost the sector, various niche tourism products introduced by Government of India, India's G20 Tourism priorities and Vision 2047 with respect to tourism sector.

Sincerely,

Mr. Dipak Deva
Chairman, FICCI Tourism & Art, and Culture Committee
Managing Director, Sita, TCI & Distant Frontier



Foreword

India is a land of diverse cultures, traditions, and landscapes which makes it one of the most coveted tourist destinations in the world. It is one of the few countries in the Asia Pacific for inbound tourism to recover faster in 2023. After the COVID-19 pandemic, many reforms are underway in India to promote tourism; these reforms have significantly boosted the sector. Total Foreign Tourist Arrivals in India surged by 305.4 per cent in 2022 compared to the previous year and the total contribution of travel and tourism to India's economy, including both direct and indirect impacts, was estimated to be USD 426.2 billion as compared to USD 178.0 billion in 2021.

The good news is that the whole world is experiencing a recovery in Tourism. As per a recent study by WTTC, the prediction is that the global tourism economy will grow at 5.2 per cent while the economy will grow at 2.5 per cent till 2030. India's G20 presidency provides a fantastic opportunity to highlight the country's tourism offerings on a global stage and the plans are on to unlock this global campaign, by inspiring citizens into being India's ambassadors.

Through the GITB'23 platform, we are pleased to present this report "Inbound Tourism in India – unlocking the potential ". The report aims to provide insights into the current scenario of Inbound tourism in India. The report can help in planning and implementing policies and initiatives that attract more visitors to India and improve their experience while they are here. The report also facilitates the investors, and developers to identify opportunities for growth and investment in the tourism industry.

As Malala Yousafzai, very truly said at the India Today Conclave 2021, "India's potential as a tourism hub is limitless, with its diverse culture, rich history, and stunning natural beauty. It is time for the world to discover the treasures that India has to offer." A concerted effort of various stakeholders, including the government, the private sector, and local communities are required to unlock the potentials of India's Tourism industry and accelerate the sector's growth.

Let us embrace the potential of India's inbound tourism industry and unlock the opportunities that lie ahead.

Thank you!

Sincerely,

Suraj Nangia
Head (Government and Public Sector Advisory)
Nangia Andersen LLP



Foreword

Our Country has evolved as a preferred tourism location for global tourists and travellers for years. Travellers have been coming all through the year for trade & commerce, enticing Himalayas, Sea shores, & rich Hindu culture. Travel agenda has seen a radical change in the new era. Indian Owing to alluring tourist destinations & historic rich heritage, has always been on the world map for multicultural tourists & travellers contributing to our GDP.

With Our honourable prime minister Shri Narendra Modi taking up the Presidency of the G20 in 2023, it has provided another important opportunity for the country to showcase its leadership on the global stage. As part of its G20 Presidency, India is expected to focus on several key priority areas, including sustainable development, digitalization, and the promotion of inclusive growth. In addition, India is expected to prioritize the promotion of tourism, particularly inbound tourism.

"According to the Indian Tourism Statistics 2022 report, 677.63 million domestic tourists visited India in 2021", Our major focus was to be in business for the tourism industry, Government of India launched "Dekho Apna Desh" for encouraging domestic tourism & for global travellers Government of India Started e-Tourist visa online which in turn increased foreign travellers. Lot of initiatives were taken by states like Kerala, Karnataka & Tamil Naidu to attract both Indian as well as foreign tourists.

I take this opportunity to present a Knowledge Report with The Federation of Indian Chambers of Commerce & Industry & Nangia Andersen LLP on "Inbound Tourism in India – Unlocking the Potential" highlighting the G20 Tourism expo which strives to address five key priority areas for Tourism including Green Tourism, Digitization, Skill development, Nurturing Tourism MSME's & Destination Management at a Global level on April 23, the first day of the Great Indian Travel Bazaar 2023. The report also presents Nation's Vision 2047 with respect to tourism and how would it shape with advancement of Technology and Digital Platforms.

Sincerely,

Poonam Kaura
Partner (Government and Public Sector Advisory)
Nangia Andersen LLP



Inbound Tourism in India – Unlocking the Potential

Year	April 2023	
Authors	Government and Public Sector Advisory, Nangia Andersen LLP	
Acknowledgement	The views expressed are those of the author and do not necessarily represent the views of the affiliated institutions. The report is prepared using the information of a general nature and is not intended to address the circumstances of any individual or entity. The report has been prepared from various public sources such as UNWTO, WTTC, Ministry of Tourism Statistics, and various ministries Statistics and the information received from these sources is believed to be reliable. The information available in the report is selective and subject to updation, revision, and amendment. While the information provided herein is believed to be accurate and reliable, FICCI and Nangia Andersen LLP do not make any representations or warranties, expresses or implied, as to the accuracy or completeness of such information and data available in the public domain. While due care has been taken while preparing the report, Nangia Andersen LLP and FICCI do not accept any liability whatsoever, for any direct consequential loss arising from this document or content.	
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Great Indian Travel Bazaar

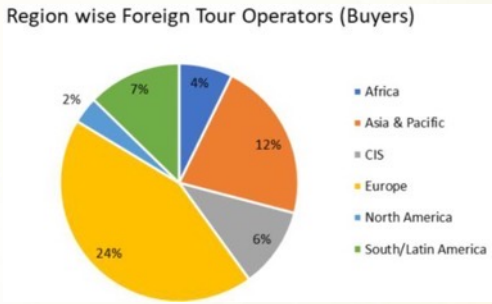


The Great Indian Travel Bazaar (GITB) is an annual event that plays a vital role in promoting India as a premier tourism destination. The event is organized by the Rajasthan Tourism Department and Federation of Indian Chambers of Commerce and Industry (FICCI). It provides a platform for travel and tourism professionals to come together and showcase the best that India has to offer. From the majestic forts and palaces of Rajasthan to the serene backwaters of Kerala, the event brings to life the rich tapestry of experiences that India has to offer. GITB not only highlights the diverse tourism offerings of India, but also provides a platform for networking and business opportunities for travel & tourism industry stakeholders.

As we continue to navigate the challenges posed by the COVID-19 pandemic, events like GITB are more important than ever. By bringing together the travel industry and promoting India as a destination, GITB is helping to lay the foundation for a brighter future for Inbound tourism in India.

GITB provides a platform to more than 280 foreign tour operators from all over the world and more than 290 Indian Exhibitors to showcase their products and services to potential buyers from around the world. All areas of tourism including leisure, cultural, adventure, luxury, MICE, wildlife, safaris, ayurveda are discussed in the event. The event includes pre-

Scheduled business-to-business meetings, exhibitions, seminars, and cultural programs. Over the period of two days more than 11,000 pre- scheduled structured face to face business meetings take place between foreign buyers and Indian sellers. The event results in significant transacting and capitalizing of business opportunities for the travel industry in India and contributes to the growth of the country's tourism sector.



India Exhibitors (Sellers)

1. Indian State tourism Boards
2. Luxury & Heritage Hotels
3. Luxury & MICE Tour Operators
4. Destination Management Compaigns
5. Luxury Resorts
6. Ayurveda & Wellness Centres
7. Travel Agencies
8. Adventure & Wildlife Tourism
9. Travel Technology Companies

The Great Indian Travel Bazaar (GITB) receives participation from leading Indian Exhibitors from across the country.

Executive Summary





India is one of the world's top tourist destinations, with a rich cultural heritage and diverse natural landscapes. The Inbound tourism in India has experienced significant growth in the recent years, with the country emerging as a popular destination for international traveller. Despite the challenges posed by the pandemic, India has received 6.2 million foreign tourist arrivals in 2022, with a growth rate of 307.9% as compared to 1.52 million in 2021. Moreover, the travel and tourism sector in India contributed 9.2% to the country's GDP in 2022. In terms of employment, the sector generated 44.6 million jobs, which is approximately 8.5% of the total employment in India and the total contribution of travel and tourism to India's economy, including both direct and indirect impacts, was estimated to be USD 426.2 billion in 2022 as compared to USD 178 billion in 2021. Tourism tends to encourage the development of multiple-use infrastructure including hotels, resorts & restaurants, transport infrastructure and healthcare facilities. India is among the top 10 Largest Travel & Tourism Economies of the world and ranks 6th in 2021 as per WTTC Travel & Tourism Economic Impact Report 2022. India is currently ranked 54th in World Economic Forum's Travel & Tourism Development Index (2021). By 2030, India is expected to be among the top five business travel market.

The top 10 source countries accounted for 56.46% of the total inbound tourist flows in 2022, which includes United States, Bangladesh, United Kingdom, Australia, and Canada. Foreign tourist arrivals from most of the top source countries grew during the last few years. The introduction of E-Visa has led to a strong surge in Foreign Tourist Arrivals since its launch in September 2014. Talking about the seasonality in Foreign Tourist Arrivals, for India the 4th quarter of a calendar year constitute the peak quarters. In 2022, December has been the peak month for FTAs in India followed by November, October, July, and September. It is also found that travel by 'air' has been the most preferred mode of transport. The Delhi Airport had registered maximum number of FTAs (31.21%) in India followed by Mumbai airport (14.70%), Haridaspur land check post (9.47%) and Chennai airport (9.24%). As per India Tourism Statistics, 2022 Report, 39.4% of foreign tourist arrivals was for the purpose "Indian Diaspora" followed by, Medical (21.2%), Business and Professionals (12.1%) and other purpose (9.4%). The top 5 States with highest FTAs in 2021 were Punjab (0.3 million), Maharashtra (0.18 million) and Delhi (0.1 million) with their respective shares being 29.22%, 17.60% and 9.50%.

The Indian government has been making concerted efforts to promote inbound tourism, recognizing its potential as a key driver of economic growth and employment generation. The Ministry of Tourism has taken several steps/initiatives to increase the inflow of tourists. Few of them are:

- Launched Swadesh Darshan Scheme for the development of tourism related infrastructure in the country. The Ministry of Tourism has revamped its Swadesh Darshan Scheme as Swadesh Darshan 2.0 (SD2.0) with the objective to develop sustainable and responsible destinations following a tourist & destination centric approach.
- Lunched National Mission on Pilgrimage Rejuvenation and Spiritual, Heritage Augmentation Drive (PRASHAD) Scheme for integrated development of identified pilgrimage destinations.
- 24x7 toll free Multi-Lingual Tourist Helpline.
- Providing facility of e-Visa for 5 sub-categories i.e., e-Tourist visa, e-Business visa, e-Medical visa, e-Medical Attendant visa and e-Conference visa for nationals of 165 countries.
- E-Visa has been further liberalized and the visa fee has been substantially reduced.
- Development and promotion of 'Niche Tourism' products to attract tourist with specific interest and
- to ensure repeat visits for the unique products in which India has a comparative advantage.
- Promoting India as a holistic tourism destination including its various tourism sites and products
- through Ministry's social media handles and website.
- Conducting Programmes under the 'Capacity Building for Service Providers' (CBSP) Scheme to train
- and up-grade manpower to provide better service standards.
- New mountain peaks have been opened for Mountaineering/ Trekking to give boost to adventure tourism in the country.
- Lowering of GST on hotels rooms with tariffs of ₹1,001 to ₹7,500/night to 12%, those above ₹7,501 to 18% to increase India's competitiveness as a tourism destination.
- On the recommendation of the Ministry of Tourism, 59 tourism routes have been awarded to the identified airlines by the Ministry of Civil Aviation under the RCS UDAN Scheme, for which Ministry of Tourism extends financial support in form of VGF (Viability Gap Funding). 51 of these routes have been operationalized till date.

During India's G-20 Presidency, more than 200 meetings is going to be held at more than 50 locations across the countries. The Ministry of Tourism has declared 2023 as Visit India Year to generate strong interest in the world in visiting India. India's G20 priorities revolve around inclusive, equitable and sustainable growth; LiFE; women's empowerment; digital public infrastructure and tech-enabled development in various important areas. The G20 Tourism Working Group during India's G-20 Presidency has identified five inter-connected priority areas: greening of tourism sector, power of digitisation, empowering youth with skills, nurturing tourism MSMEs/ startups and strategic management of destinations.

The government is contemplating setting up a new advisory board to promote India as a major tourism destination. As part of a proposed policy, there will be renewed focus on enhancing the contribution of tourism to India's economy by increasing visitation, stay and spending, and making India a year-around tourist destination. The Nation's vision 2047 with respect to tourism is to become a USD 1 trillion industry. To achieve this goal India has formulated a draft national tourism policy and is diversifying tourism offerings by exploring new and unique tourism products such as cultural and heritage tourism, adventure tourism, eco-tourism, and wellness tourism. It has also developed four-pronged development strategy that focuses on Improving the connectivity - air, rail, and roads, enhancing the tourism infrastructure and dependent services, streamlining branding and promotion and showcasing the culture and heritage.

The industry must also be adaptable and responsive to changing trends and consumer preferences to remain competitive and sustainable in the long run.

Travel & Tourism Overview



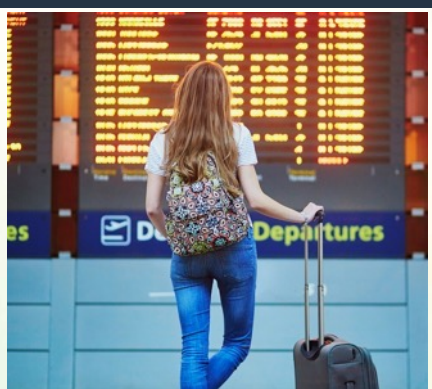


Tourism and travel refer to the activities of people traveling to and staying in places outside of their usual environment for leisure, business, or other purposes. It involves a wide range of activities, including transportation, accommodation, dining, sightseeing, shopping, and other recreational activities.

Tourism and travel are significant contributors to the global economy, generating billions of dollars in revenue and creating millions of jobs. It is also a major source of foreign exchange earnings for many countries, particularly in developing regions.

There are various types of tourism and travel. They are:

Table 1: Types of Tourism

		
Domestic tourism (traveling within one's own country)	**Inbound tourism** (traveling to a country from another country)	**Outbound tourism** (traveling from one's own country to another country)

contributing significantly to the global economy, and creating millions of jobs. However, due to travel restrictions, lockdowns, and border closures, the industry suffered a severe setback in 2020.

Following a loss of almost USD 4.9 trillion in 2020 (-50.4% decline), Travel & Tourism's contribution to GDP increased by USD 1 trillion (+21.7% rise) in 2021. In 2019, the Travel & Tourism sector contributed 10.3% to global GDP; a share which decreased to 5.3% in 2020 due to ongoing restrictions to mobility. 2021 saw the share increasing to 6.1%[1] and for 2022 it was 6.47% (estimated). Prior to the COVID-19 pandemic, the growth rate of the global Travel & Tourism sector outpaced the growth of the global economy for nine consecutive years.

Travel & Tourism's contribution to the global economy is expected to grow at an average annual rate of 5.8% which is more than double the 2.7% average annual growth rate estimated for the global economy between 2022 and 2032. In that same period, the sector is forecasted to generate 126 million additional jobs.[2]

Total Contribution of travel & Tourism to Global GDP (in USD Trillion)



Figure 1: Tourism Contribution to Global GDP
Source: WTTC

Table 2: Tourism Contribution to Global GDP and jobs

Global Data 2019 - 2022		
	Total GDP Contribution	Total Travel & Tourism Jobs
2019	**10.3%** **USD 9630 BN**	**333 MN**
2020	**5.3%** **USD 4775 BN**	**271 MN**
2021	**6.1%** **USD 5812 BN**	**289 MN**
2022	**6.47%** **USD 6149 BN** (estimated)	**299 MN** (estimated)

Source: WTTC Report 2022

1 https://wttc.org/research/economic-impact
2 WTTC Travel & Tourism Economic Impact 2022

In 2019, Travel & Tourism supported 333 million jobs around the world, representing 1 in 10 of all jobs globally. Despite government retention schemes such as furloughs and others which supported employment, 62 million jobs were lost in 2020, a decline of 18.6%. As the contribution of the sector to the global economy increased in 2021, it was accompanied by a rise in the number of Travel & Tourism jobs from 271.3 million in 2020 to 289.5 million in 2021, an increase of 18.2 million jobs (6.7% rise). Consequently, the sector supported 1 in 11 jobs across the entire economy in 2021. For the year 2022, it is estimated to be 299 million, a rise of 3.4% from previous year. The change in Travel & Tourism's contribution to jobs is slower than the change in contribution to GDP because jobs are less elastic and hence, are less volatile. This is because the process of laying off existing staff and onboarding new personnel takes time.

Top 10 Largest Travel & Tourism Forecasted Economies by 2032

Table 3: Top 10 largest Travel & Tourism forecasted Economies in 2032

Ranking	Country	Travel & Tourism Contribution to GDP (USD bn)
1	China	3915.0
2	United States	2663.7
3	India	457.1
4	Germany	434.2
5	Japan	425.3
6	United Kingdom	343.4
7	France	290.2
8	Mexico	260.2
9	Italy	249.5
10	Spain	245.8

Source: WTTC Travel & Tourism Economic Impact Report 2022

India is expected to be at 3rd position in the list of top largest travel and tourism economies by 2032. According to Economics Trends Report by the World Travel & Tourism Council (WTTC) 2022, India has been ranked sixth in terms of travel and tourism's contribution towards GDP. India has improved its rank from 10th in 2019. India contributed USD 178 billion towards GDP in 2021. The first position was secured by the United States with USD 1271.2 billion dollars contribution of travel and tourism in 2021.

International Tourists Arrivals

International Tourist Arrivals (million)



Figure 2: International tourist arrival
Source: https://www.unwto.org/tourism-data/global-and-regional-tourism-performance

3 https://www.unwto.org/taxonomy/term/347



Figure 3: International tourist arrival by region 2022
Source: https://www.unwto.org/tourism-data/global-and-regional-tourism-performance

Europe is the world's largest destination region, recorded 585 million arrivals in 2022 to reach nearly 80% of pre-pandemic levels (-21% over 2019). The Middle East enjoyed the strongest relative increase across regions in 2022 with arrivals climbing to 83% of pre-pandemic numbers (-17% versus 2019). Africa and the Americas both recovered about 65% of its pre-pandemic visitors, while Asia and the Pacific reached only 23%, due to stronger pandemic-related restrictions. By subregions, Western Europe (87%) and the Caribbean (84%) came closest to their pre-pandemic levels.

Most visited countries in the world in 2022



Figure 4: Most visited countries in the world in 2022
Source: https://globalconnect.uz/top-10-most-visited-countries-in-the-world

For the year 2022, France, USA and Spain were the top three most visited countries in the world recording 82.6, 75.6 and 75.6 million visitors respectively.

Travel and Tourism in India

Travel and tourism are the largest service industry in India. It provides heritage, cultural, medical, business and sports tourism etc. India being one the most popular travel destinations across the globe has resulted in the Indian tourism and hospitality industry to emerge as one of the key drivers of growth among the service sector in India. Tourism industry in India has significant potential considering the tourism is an important source of foreign exchange in India like many other countries. According to the World Travel and Tourism Council (WTTC), the travel and tourism sector in India contributed 9.2% to the country's GDP in 2022. In terms of employment, the sector generated 44.6 million jobs, which is approximately 8.5% of the total employment in India.

Contribution of Indian Tourism to GDP and Employment

Table 4: Contribution of Indian Tourism to GDP and Employment

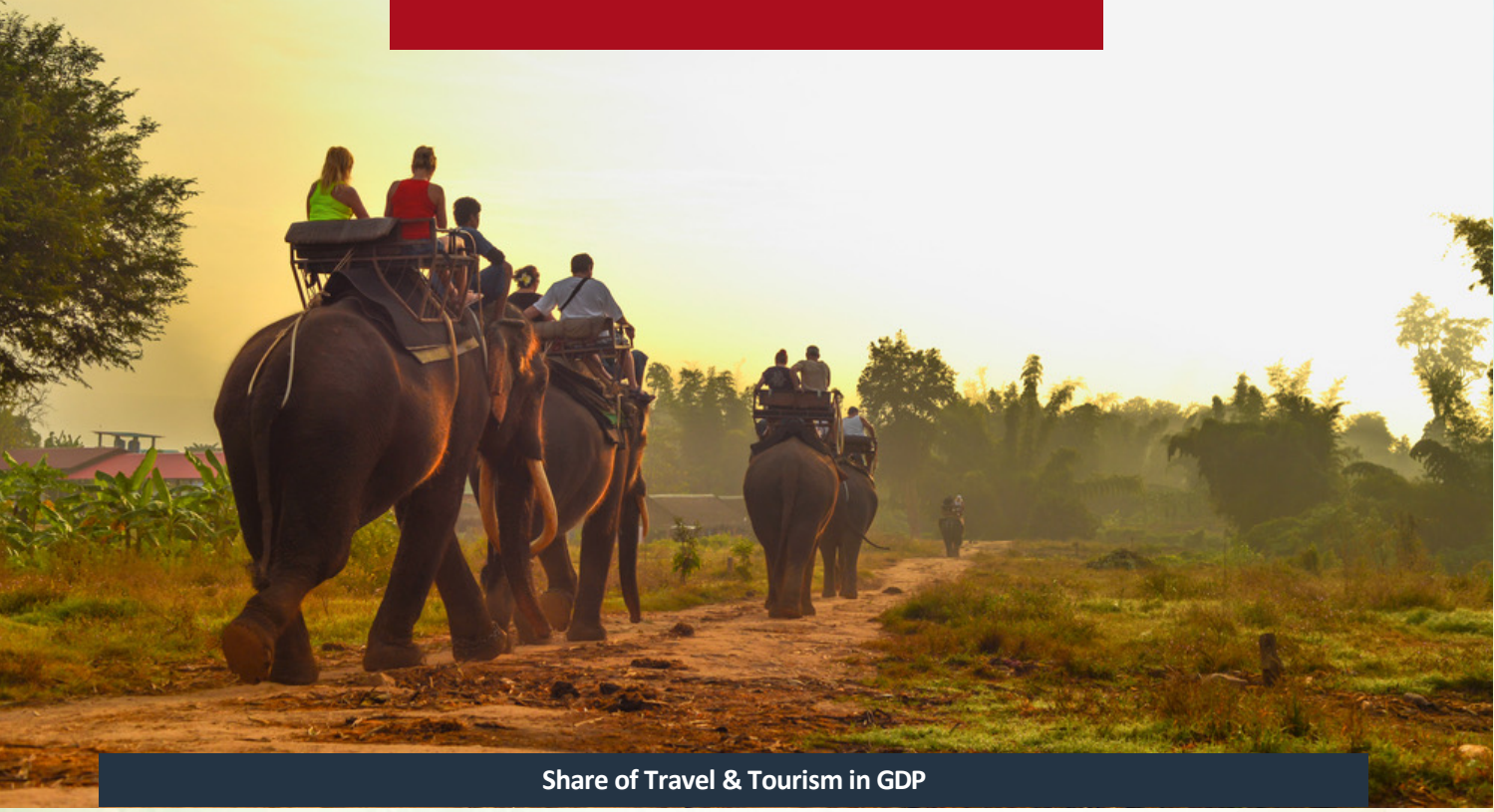
2019	2020	2021	2022
Total contribution of Travel & Tourism to GDP			
7.0% of total Economy INR15729.3 BN (USD 212.8 BN)	**4.3% of total Economy INR 9164.9 BN (USD 124.0 BN)**	**5.8% of total economy INR13161.1 BN (USD 178.0 BN)**	**9.2% of total economy INR 32026.9 BN (USD 426.2 BN)**
Total contribution of Travel & Tourism to Employment			
40.10 MN	**29.14 MN**	**32.10 MN**	**44.6 MN**
Visitor Spend			
International			
INR2532.6 BN	**INR 1072.6 BN**	**INR 2532.6 BN**	**INR 1718.1 BN**
Domestic			
INR 11515.6 BN	**INR 7170.7 BN**	**INR 11166.6 BN**	**INR 11736.3 BN**

Source: WTTC Report 2022

As for visitors' spending, the WTTC estimated the international visitors spent of INR 1,718.1 billion (USD 22.9 billion) in 2022, while domestic visitors spent INR 11,736.3 billion (USD 156.3 billion). The total contribution of travel and tourism to India's economy, including both direct and indirect impacts, was estimated to be INR 32,026.9 billion (USD 426.2 billion) in 2022.

There is immense benefit flow into the economy of the country through the growth of tourism. From the below figures it can be inferred that travel & tourism is positively contributing to the GDP and Employment of the country in the successive years.





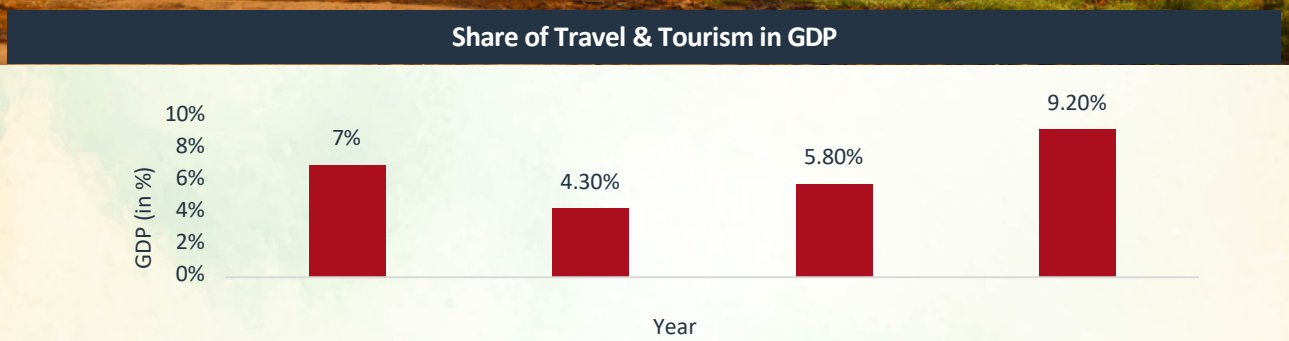


Figure 5: Contribution of tourism in GDP
Source: WTTC Report 2022



Figure 6: share of tourism in Employment
Source: WTTC Report 2022

India is estimated to contribute 250 billion USD GDP from Tourism, 137 million jobs in the Tourism sector, USD 56 billion in Foreign Exchange Earnings by 2030. By 2028, Indian tourism and hospitality is expected to earn USD 50.9 billion as visitor exports compared with USD 28.9 billion in 2018. The travel market in India is projected to reach USD125 billion by FY27 from an estimated USD 75 billion in FY20.[4]

[4] https://www.investindia.gov.in/sector/tourism-hospitality#:~:text=India%20is%20estimated%20to%20contribute,to%20be%20achieved%20by%202030.&text=The%20travel%20market%20in%20India,estimated%20%2475%20Bn%20in%20FY20.



India Accounts

1.6%
Share in World Tourist Arrivals (2021)

1.5%
Share in International Tourism Receipts (2021)

$8.8 Bn
Foreign Exchange Earnings (FEEs) (2021)

20th
Visitor exports, WTTC (2021)

Figure 7: Share of Indian Tourism at Global Level

India Ranks

4th in terms of Domestic visitor spending, WTTC (2021)

6th in terms of Travel & Tourism total contribution to GDP, WTTC (2021)

54th on the World Economic Forum Travel & Tourism Development Index (2021)

Figure 8: India's world rank in tourism industry

India's Rank in World Economic Forum Travel & Tourism Competitiveness Index

The country has seen significant jump in the Travel & Tourism Competitiveness ranking by the World Economic Forum, rising from 65th position in 2013 to 54th in 2021 making India one the most improved nations. India excels on parameters such as natural resources (6th), Air transport Infrastructure (20th), Safety and security (91st), Environmental sustainability (113th) and Prioritization of travel and Tourism (81st).

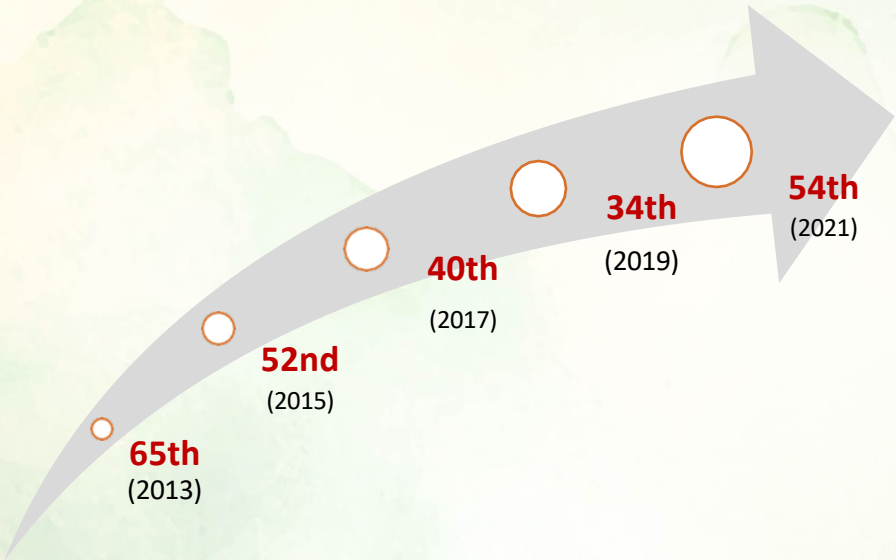


Figure 9: India's Rank in World Economic Forum Travel & Tourism Competitiveness Index
Source: India Tourism Statistics, 2022

Inbound Tourism in India

India's inbound tourism industry has been steadily growing in recent years. India has always been one of the top tourist destinations in Asia as well as in the world. Before COVID India saw over 9.7 million international tourist Arrivals from around the world. The number has dropped to 5.7 million in 2022. The average for Asia in the same period was -75% drop, so India is performing better when compared to rest of the continent. By 2030, India is expected to be among the top five business travel market.[5]

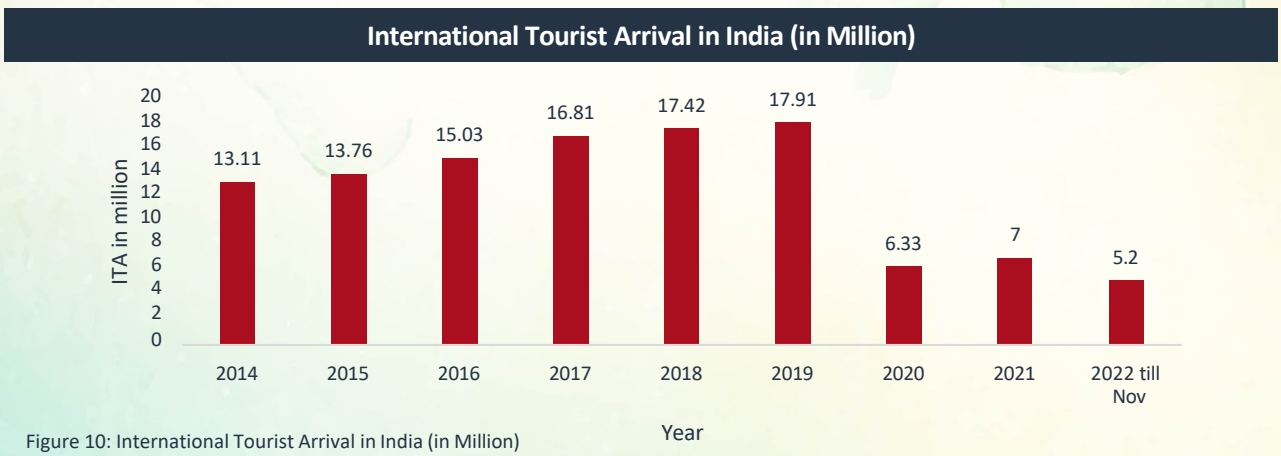


Figure 10: International Tourist Arrival in India (in Million)
Source: Bureau of Immigration

[5] https://www.investindia.gov.in/sector/tourism hospitality#:~:text=India%20is%20estimated%20to%20contribute,to%20be%20achieved%20by%202030.&text=The%20travel%20market%20in%20India,estimated%20%2475%20Bn%20in%20FY20.



Analysis of Foreign Tourist Arrivals (FTAs)

According to the Ministry of Tourism, India has received 6.2 million foreign tourist arrivals in 2022, with a growth rate of 307.9% as compared to 1.52 million in 2021. It is expected that India will achieve 25 million foreign arrivals by 2030.

Foreign Tourist Arrivals (FTAs) in India (in Million)

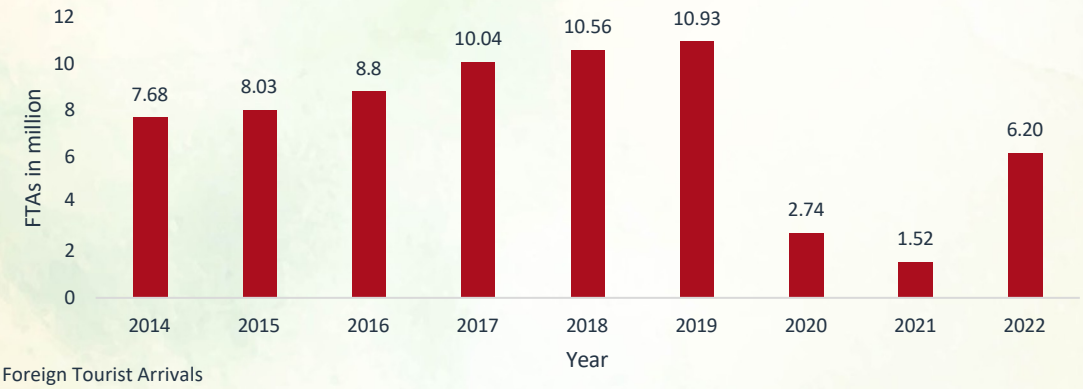


Figure 11: Foreign Tourist Arrivals
Source: Bureau of Immigration

Source Countries of Foreign Tourist Arrivals

The top 10 source countries accounted for 56.46% of the total foreign tourist arrival in 2022 according to Bureau of Immigration, Government of India. The top three source countries were USA, Bangladesh, and UK accounting for 22.19%, 20.29% and 9.98% respectively.

Percentage share of top 10 countries to FTAs in India 2022



Figure 12: Percentage share of top 10 countries to FTAs in India
Source: Bureau of Immigration

Foreign Tourist Arrivals (FTAs) in India from different regions

From the below figure, it can be observed clearly that the FTAs in India have decreased because of the pandemic from all regions. The percentage share in FTAs in India during 2021 was the highest for North America (33.42%), followed by South Asia (26.11%), Western Europe (21.93%), Africa (4.51%), West Asia (3.42%), Eastern Europe (2.82%), Australasia (2.54%), Southeast Asia (2.52%), East Asia (2.21%), Center and South America (0.45%).

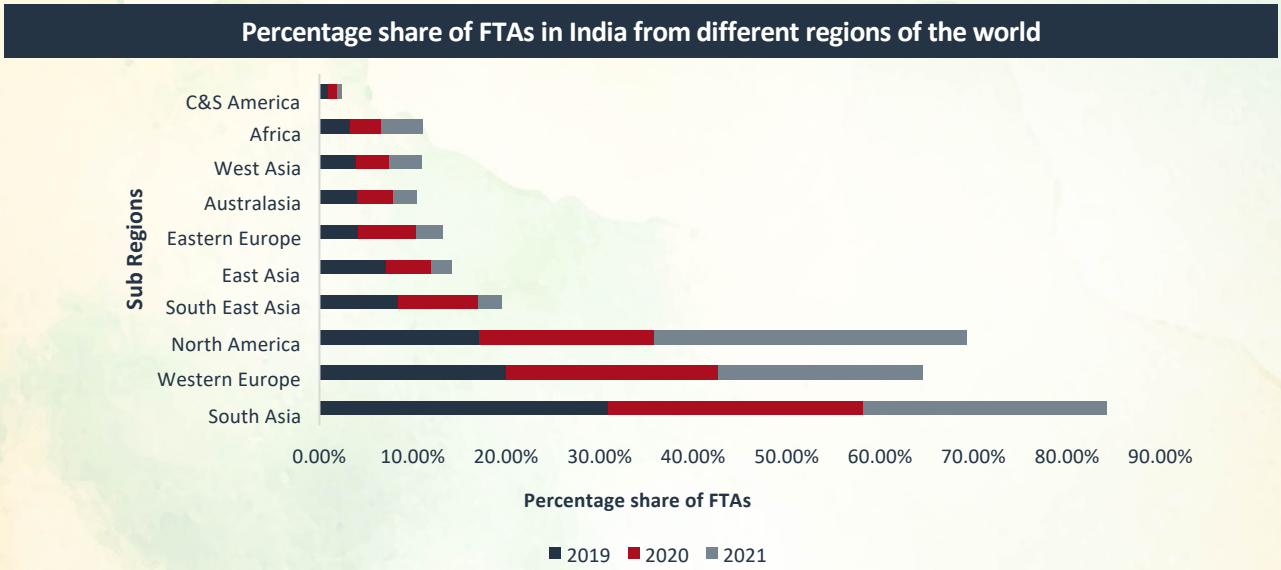


Figure 13: Percentage share of FTAs in India from different regions of the world
Source: India Tourism Statistics, 2022

Seasonality in Foreign Tourist arrivals in India

Weather condition at different tourist destinations is one of the important determinants of tourist arrivals. In the past, seasonal variations have been observed in FTAs to India. For India the 4th quarter of a calendar year constitute the peak quarters. The below figure shows the month-wise FTAs in India from 2019 to 2023. In 2022, December has been the peak month for FTAs in India followed by November, October, July, and September.

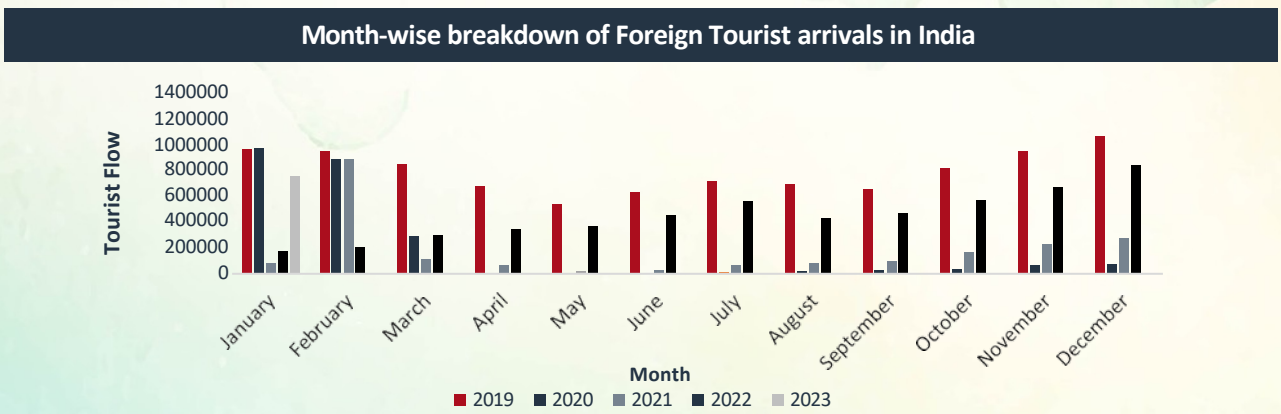


Figure 14: Month-wise breakdown of Foreign Tourist Arrivals in India
Source: Bureau of Immigration (BOI)

Top Ports with Foreign Tourist Arrivals (FTAs) in India

During 2022, the Delhi Airport had registered maximum number of FTAs with 31.21 per cent in India followed by Mumbai airport (14.70%), Haridaspur land check post (9.475), Chennai airport (9.24%) and Bengaluru (6.36%). The below figure shows the top 15 ports with foreign tourist arrivals in India for the year 2022.

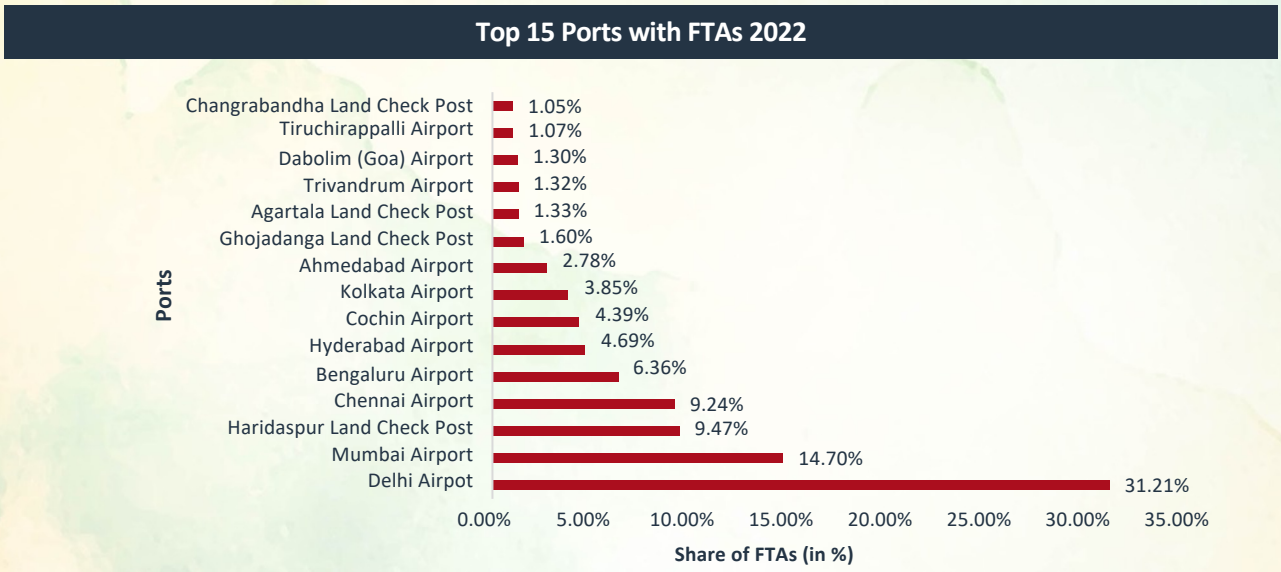


Figure 15: Month-wise breakdown of Foreign Tourist Arrivals in India
Source: Bureau of Immigration (BOI)

Purpose of Foreign Tourist Arrivals (FTAs) in India

As per India Tourism Statistics 2022 Report, 39.4% of foreign tourist arrivals was for the purpose "Indian Diaspora" followed by Medical (21.2%), Business and Professionals (12.1%) and other purpose (9.4%). The FTAs for the purpose of Leisure Holiday and Recreation and Student is the lowest with 5.8% and 2% respectively. 64.6% of tourists from Australia came under the category, "Indian Diaspora" followed by North America (62.0%) and Western Europe (52.9%). 68.4% of arrivals from South Asia was under the category Medical followed by West Asia (61.1%) and Africa (40.0%). 88.1% arrivals from East Asia were for 'Business professionals' followed by Central & South America (46.5%).[6]

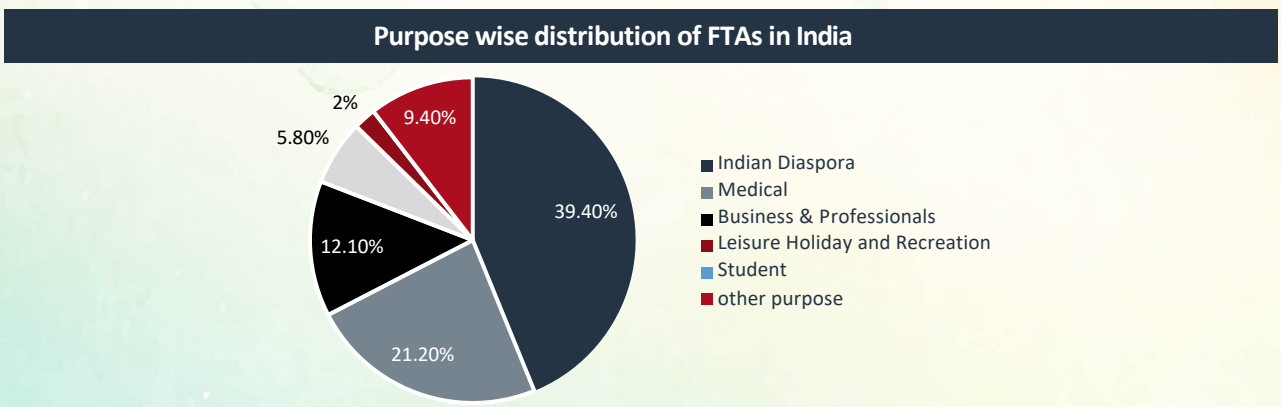


Figure 16: Purpose wise distribution of FTAs in India
Source: India Tourism Statistics, 2022

[6] India Tourism Statistics, 2022

Top states in number of Foreign Tourist Visits (FTAs)

As per India Tourism Statistics 2022 Report, the top 5 States/UTs with maximum foreign tourist arrivals were Punjab (0.3 million), Maharashtra (0.18 million), Delhi (0.1 million), Karnataka (0.072 million) and Kerala (0.06 million) with their respective shares being 29.22%, 17.60%, 9.50%, 6.87% and 5.74%. These 5 States/UTs accounted for about 68.95% of the total foreign tourist visits to the States/UTs in the country.

Top 10 States with Foreign Tourist Arrival (FTA)

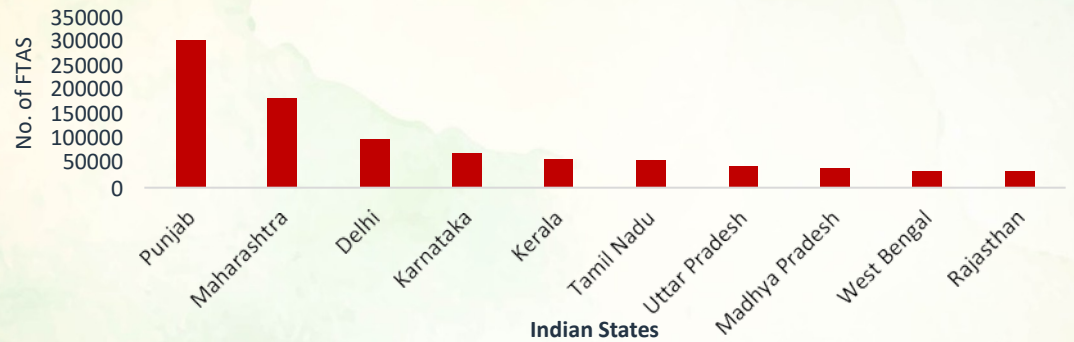


Figure 17: Top Indian states with FTAs
Source: India Tourism Statistics, 2022

Foreign exchange earnings from tourism

Tourism is an essential source of foreign exchange earnings. Increased foreign exchange results in an increased interest in tourists to venture aboard, increase their expenditure, and positively affect the length of their stay and vice versa. This loop creates a significant impact on the economy.

Foreign exchange earnings during the period January - December 2022 were USD 16.926 billion as compared to USD 8.797 billion in January – December 2021. The growth rate in foreign exchange earnings in USD billion in January - December 2022 over January – December 2021 was 92.41%. In 2021, foreign exchange earnings from tourism industry across India amounted to nearly nine billion U.S. dollars. This was a rise of over 26 percent compared to the previous year. In 2019, tourism was the third largest foreign exchange earner for the country.

Foreign exchange earnings in billion U.S dollars



Figure 18: Foreign exchange earnings in billion U.S dollars
Source: Ministry of Tourism



Share of key Markets in E-Visa

In 2020, before covid, India had issued over 836,000 visas in just 2.5 months, in 2021 it was 72870 and in 2022, since the restart of India e-visa services, 574000 e-visa has been applied by foreign tourists for the first 6 months. Citizens of USA have applied for the most e-VISAs with almost 40% of the visas followed by Russians. Europeans have a special interest in visiting India to see its spiritual side. Not to mention that India has a vast diaspora all throughout the world, and many of them desire to return home.

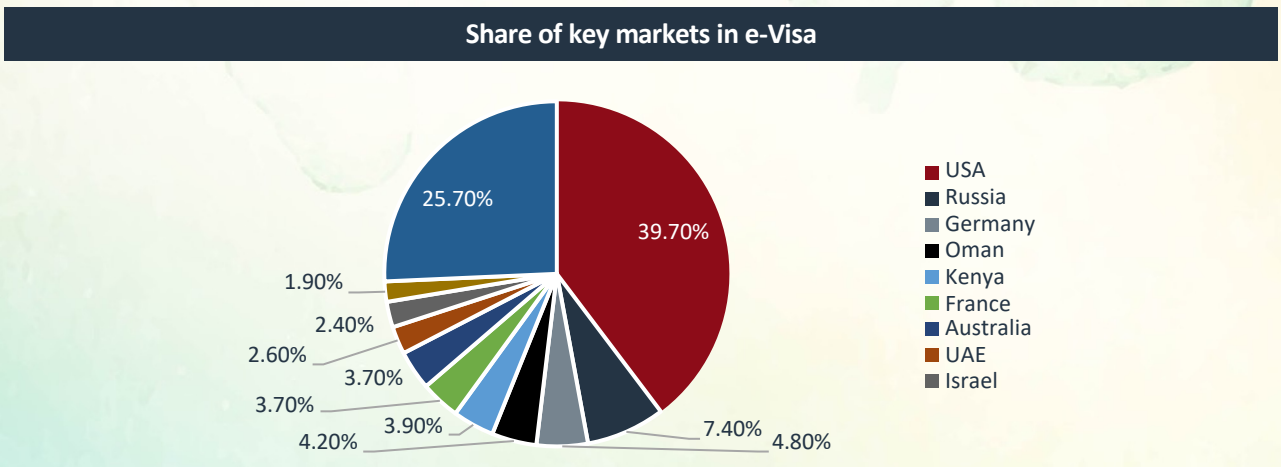
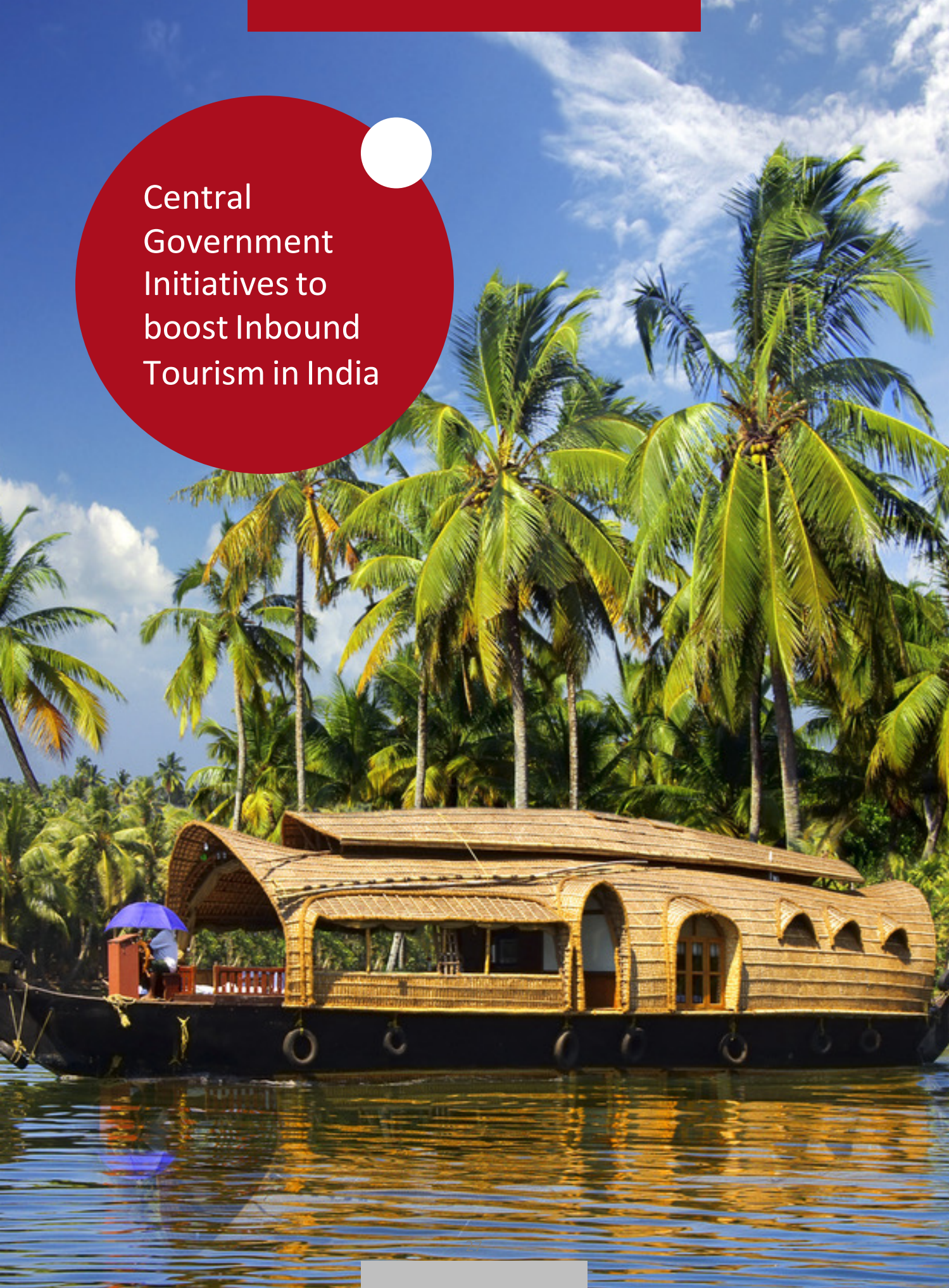


Figure 19: Share of key markets in e-visa
Source: Bureau of Immigration (BOI)

Central Government Initiatives to boost Inbound Tourism in India



The Government of India has taken several steps over the years to provide a better experience for tourists to make India a top tourist destination in the world. The various initiatives/steps taken by various ministries to boost the tourism sector are as described below:



Ministry of Tourism

- **National Tourism Policy 2022:** The Ministry of Tourism has formulated National Tourism Policy 2022.

National Tourism Policy 2022



The vision of the Policy is "to transform our tourist destinations to provide world class visitor experience making India one of the topmost destinations for sustainable and responsible tourism."



The mission of the Policy is "to create an enabling policy framework and strategic plan in partnership with Central, State and Local Governments and Industry Stakeholders to improve framework conditions for tourism in the Country, support tourism industries, strengthen tourism support functions and develop tourism sub sectors."

- **Swadesh Darshan Scheme:** Ministry of Tourism launched Swadesh Darshan Scheme in January 2015 for development of theme-based tourist circuits. Ministry of Tourism has identified 15 themes for development of tourist circuits under the Swadesh Darshan Scheme. A total of 76 projects have been sanctioned for a total amount of Rs.5315.59 Crore under the scheme. 59 projects have been completed. The Ministry of Tourism has revamped its Swadesh Darshan Scheme as Swadesh Darshan 2.0 (SD2.0) with the objective to develop sustainable and responsible destinations following a tourist & destination centric approach.

- **PRASAD Scheme:** Ministry of Tourism launched National Mission on Pilgrimage Rejuvenation and Spiritual, Heritage Augmentation Drive (PRASHAD) Scheme in January 2015 for integrated development of the selected pilgrimage destinations in the country. As on date a total number of 73 sites in 30 States/UTs have been identified for development under the scheme. A total of 45 projects for an amount of Rs.1586.10 Crore have been sanctioned under the scheme. 20 projects have been completed. Under the category of smaller/mini projects also 33 places have been identified in 10 States.

- **Adopt a Heritage Scheme:** The Ministry of Tourism has launched the Adopt a Heritage Scheme to promote heritage tourism in India. The scheme invites private and public sector companies to adopt heritage sites and develop them into tourist destinations.

- **Incredible India 2.0 Campaign:** The Ministry of Tourism launched Incredible India 2.0 campaign during 2017-18. The 2.0 Campaign marked a shift from generic promotions across the world to market specific promotional plans and content creation. Thematic creatives on different Niche products including Yoga, Wellness, Wildlife, Cuisine, Luxury, Buddhist Sites, Golf, Medical Tourism, River Cruises, etc. were produced and showcased on Global Television Channels and online/social media across the world.

- **Dekho Apna Desh:** The Ministry of Tourism launched the Dekho Apna Desh initiative in January 2020. Under this initiative Ministry has been organizing webinars, quiz, pledge, discussions to keep connected with the stakeholders and to encourage citizens to travel within the country. Dekho Apna Desh is promoted extensively on social media accounts and website of the Ministry and by Domestic India Tourism offices. More than 175 webinars have been conducted so far.

- **Hospitality Development and Promotion Board:** The Ministry of Tourism has set up the Hospitality Development and Promotion Board to promote tourism infrastructure and investment in the country. The board works with various stakeholders to develop and promote tourism infrastructure and facilities in India.

- **India Tourism Mart:** The Ministry of Tourism has launched the India Tourism Mart to showcase India's tourism potential to international buyers. The event brings together various stakeholders in the tourism industry, such as tour operators, hoteliers, and travel agents, to showcase India's tourism products and services.

- **E-Visa:** The Ministry of Tourism has launched e-visa, which allows foreign tourists to apply for a visa online and receive it within 72 hours. This has made it easier and faster for tourists to visit India. At present, the e-Tourist visa facility is available for the nationals of 165 countries. Post pandemic, the Government also announced 500,000 free visas to the tourists. The Ministry of Tourism, in association with the Ministry of External Affairs, has appointed Tourism Officers in 20 countries in 2021, who will promote Indian tourism in those countries.

- **Swachh Paryatan Mobile App:** This is a 24x7 Tourist Helpline in 12 international languages app. The Swachh Paryatan Mobile App allows tourists to give feedback on the cleanliness and hygiene of tourist destinations they visit. Tourists can take pictures of unclean areas, litter, or garbage and upload them on the app. The app then forwards the complaint to the concerned authorities for action. The app also provides information on the nearest public toilet facilities, garbage bins, and other facilities at tourist destinations. This information helps tourists plan their trip better and promotes responsible tourism.

Ministry of Home Affairs

- **E-Visa:** The Ministry of Home Affairs has made significant efforts to simplify the visa process for foreign tourists. In 2014, the government launched the e-Visa facility, which allows foreign tourists to apply for a visa online and receive it electronically. It has relaxed the restriction for all foreign nationals intended to visit India for Tourism purposes subject to the COVID related guidelines of the Ministry of Health and Family Welfare. It has further relaxed and restored the long-term tourist visa [e-tourist visa and regular (paper) tourist visa] as well with effect from 15.03.2022.

- **E-FRRO:** The Ministry of Home Affairs has launched the e-FRRO (e-Foreigners Regional Registration Office) scheme to facilitate the registration and visa-related services for foreign tourists. The scheme allows foreign tourists to submit their visa-related documents and register with the FRRO online, which saves time and effort.

- **Tourist Visa on Arrival:** The Ministry of Home Affairs has also introduced the Tourist Visa on Arrival (TVOA) scheme for foreign tourists from several countries. Under this scheme, tourists can obtain a visa on arrival at selected airports in India, which has simplified the visa process and encouraged more foreign tourists to visit India.

- **Simplification of the visa regime:** The Ministry of Home Affairs has made efforts to simplify the visa regime for foreign tourists by reducing the number of categories and streamlining the application process.

- **Security measures:** The Ministry of Home Affairs has also taken several measures to ensure the safety and security of foreign tourists in India. These measures include the deployment of tourist police, installation of CCTV cameras at tourist spots, and the creation of a 24x7 tourist helpline.

Ministry of Civil Aviation



- **UDAN (Ude Desh ka Aam Naagrik) Scheme:** The UDAN scheme was launched in 2017 to improve air connectivity to underserved and unserved airports in the country. Under RCS UDAN-3 Tourism, Ministry of Tourism approached Ministry of Civil Aviation, with the purpose of further improving connectivity and got 59 tourism routes included for better connectivity of important tourist places including Iconic sites. Currently 51 tourism routes have been operationalized.

- **Visa on Arrival for selected countries:** The Ministry of Civil Aviation has facilitated the Visa on Arrival facility for tourists from selected countries arriving at 16 Indian airports.

- **Promotion of regional connectivity:** The Ministry of Civil Aviation has also encouraged the promotion of regional connectivity by promoting the development of regional airports and airfields. This has opened new tourist destinations for both domestic and foreign tourists and has helped in promoting tourism in lesser-known destinations.

Ministry of Railways

- **Bharat Gaurav Trains (BGT) Policy:** Indian Railways have introduced theme-based Tourist Circuit trains under the Bharat Gaurav Trains (BGT) Policy which was formulated with the purpose to showcase India's rich cultural heritage and magnificent historical places to the people of India and the world through professionals of the tourism sector and other potential service providers.

- **Luxury trains:** The Ministry of Railways also operates luxury trains, such as the Palace on Wheels and the Maharajas' Express, that offer tourists a luxurious and comfortable way to explore the country's rich cultural heritage and history.

- **Tourist-friendly stations:** The Ministry of Railways has developed several tourist-friendly facilities at railway stations, including waiting rooms, tourist information centers, and luggage storage facilities.
- This has made it easier for tourists to navigate and use the railway system in the country.

- **Tourist packages:** The Ministry of Railways offers several tourist packages in collaboration with state tourism departments and travel agencies. These packages include train tickets, accommodation, and sightseeing tours, making it easier for tourists to plan and book their trip to India.

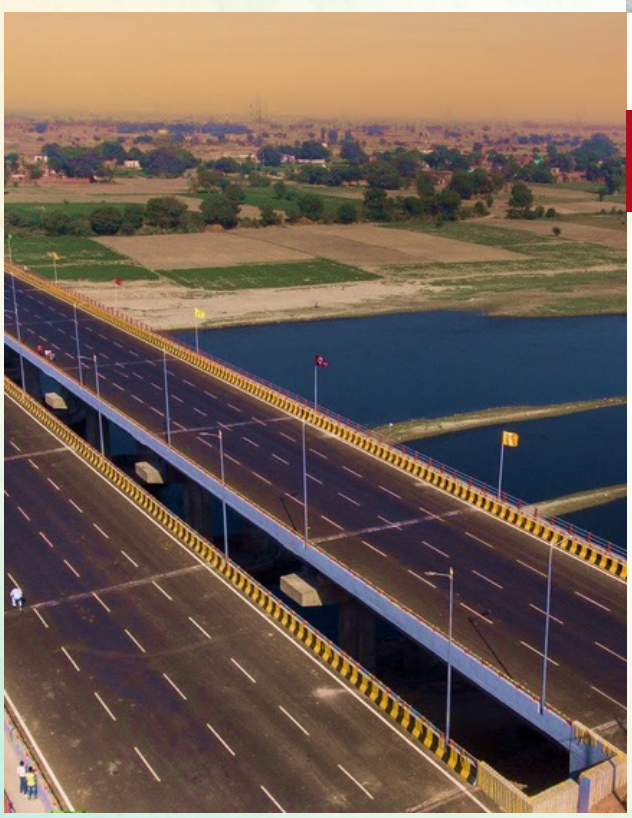


Ministry of Shipping

- **Cruise Tourism:** The Ministry of Shipping has taken several steps to promote cruise tourism in India. It has developed several new cruise terminals across the country, including the state of Maharashtra, Goa, Kerala, and Tamil Nadu. Additionally, the government has also taken several steps to ease visa regulations for cruise tourists.

- **Sagarmala Project:** The Ministry of Shipping has launched the Sagarmala Project, which aims to develop India's ports and waterways. As part of Sagarmala, more than 400 projects, at an estimated infrastructure investment of more than Rs. 8 Lac Crore have been identified across the areas of port modernization & new port development, port connectivity enhancement, port-linked industrialization, and coastal community development. This project will help to increase the efficiency of cargo movement and make India's ports more attractive to tourists.





Ministry of Road Transport and Highways

- **Development of Tourist Circuits:** The ministry is developing tourist circuits that cover several tourist destinations in a region. Out of the 50 tourist destinations to be developed under Swadesh Darshan Scheme, 23 destinations fall under the purview of Ministry of Road Transport and Highways/NHAI where the work is going on.[7] This initiative is aimed at promoting tourism in lesser-known destinations and providing employment opportunities to the locals.

[7] Report no. 338, Rajya Sabha Secretariat, New Delhi

Ministry of Environment, Forest & Climate Change (MoEFCC)



- **Green Skill Development Programme:** The MoEFCC has launched the Green Skill Development Programme to train people in various aspects of environmental conservation and management. The programme aims to create a skilled workforce in the field of environment and biodiversity conservation, which can cater to the needs of the tourism sector.
- The ministry is encouraging online submission of applications for Environment and CRZ clearance to ensure faster approvals and transparency.
- The ministry is working on Integrated Islands Management Plans for the 10 islands of Lakshadweed
- It has identified 275 Eco-Sensitive zones around National and Wildlife Sanctuaries
- It has launched Green India Mission with the vision of enhancing India's tree cover to 33%.



Ministry of Culture

- The ministry has launched Project Mausam to establish cross cultural linkages to revive historic maritime cultural and economic ties with 39 Indian Ocean countries.
- The ministry has facilitated E-Ticketing platform for ASI ticketed monuments.



Budget Allocation for Tourism Sector

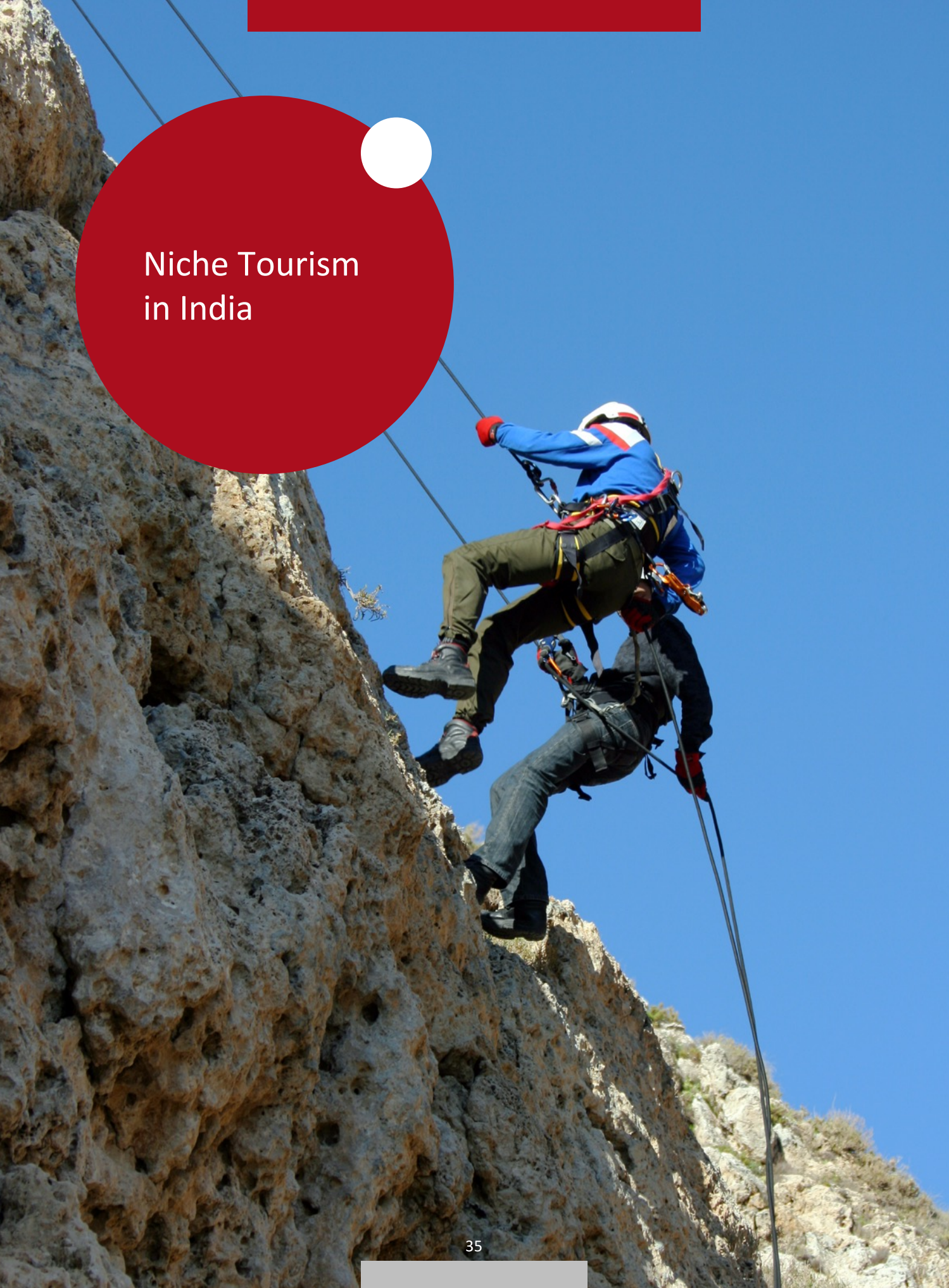
The Ministry of Tourism, Government of India has allocated a substantial outlay for 2023-2024 to promote tourism and make India one of the top destinations in Asia and the world. The below outlay is for both the domestic and international travel markets.

Table 5: Budget allocation for Tourism Sector (2023-24)

Sn	Particulars	Budget Estimate (in crore)
(A)	**Establishment Expenditure**	**108.51**
(B)	**Central Sector Schemes/Projects**	
	Tourism Infrastructure	
1	SWADESH DARSHAN	1412
2	PRASHAD: Pilgrimage Rejuvenation and Spiritual Heritage Augmentation Drive	250
3	Assistance to Central Agencies for Tourism Infrastructure Development	80.00
4	Champion Services Sector Scheme	196.22
5	Loan Guarantee Scheme for Covid affected tourism sector (LGSCATSS)	1
	Publicity and Promotion	
6	Overseas Promotion and Publicity including Market Development Assistance	167.00
7	Domestic Promotion and Publicity including Market Development Assistance	75.00
	Training and Skill Development	
8	Assistance to IHMs/FCIs/IITTM/NIWS	70.00
9	Capacity Building for Service Providers	35.00
	Total	**2286.22**
(C)	**Centrally Sponsored Schemes**	
10	Safe Tourist Destination for women	5.27
	Total	**5.27**
(B+C)	**Total Scheme (CS+CSS)**	**2291.49**
(A+B+C)	**Grand Total (Scheme + Non-Scheme)**	**2400.00**

www.indiabudget.gov.in

Niche Tourism in India





Niche tourism is the umbrella term covering a range of types of tourism. Introduction of Niche Tourism Products in India is a national development strategy. Identification, diversification, development, and promotion of niche tourism products in the country is the initiative of the Ministry to overcome the aspect of 'seasonality' and to promote India as a 365 days' destination, to attract tourists with specific interest, and to ensure repeat visits for the unique products in which India has a comparative advantage. The following Niche Tourism categories have been identified by the Ministry of Tourism and has constituted Board/ Task Forces/ Committees for development and promotion. They are:

Table 6: Niche tourism

Cruise Tourism	**Adventure Tourism**
Medical & Wellness Tourism	**MICE Tourism**
Golf Tourism	**Polo Tourism**
Eco Tourism	**Film Tourism**
Sustainable Tourism	**Rural Tourism**



Cruise Tourism

Cruise Tourism is one of the most dynamic and fastest growing components of the leisure industry worldwide. It is fast emerging as a new marketable product. India with its vast and beautiful coastline, virgin forests and undisturbed idyllic islands, rich historical and cultural heritage, can be a fabulous tourist destination for cruise tourists. With the Indian economy developing at a steady pace, middle class growing in number and increasingly possessing disposal incomes which could be spent on leisure activities, Indians could also take on cruise shipping in a big way.[8] Indian cruise market has the potential to grow 10 folds over the next decade, driven by rising demand and disposable incomes. Several attractions of India along its 7,500 km long coastline and vast river systems are yet to be unveiled to the world. India aims to increase cruise passenger traffic from 0.4 million at present to 4 million. Economic potential of Cruise tourism is expected to go up from USD 110 MN to USD 5.5 bn in the years to come.[9]

Top destinations: Trips to and from Mumbai, Goa, Lakshadweep, backwaters of Kerala, Sunderbans, Andaman, Kochi, Maldives, Ganges River, and Brahmaputra River

Government Initiatives

- A Task Force has been constituted with Secretary (Tourism) as the Chairman and Secretary (Shipping) as the Co-chairman.
- Upgradation and modernisation are being carried out at seven major ports in the country including the flagship New International Cruise terminal coming up in Mumbai with a total cost about Rs 495 crores.
- The iconic sea cruise terminal coming up at BPX-Indira Dock, is expected to be commissioned by July 2024. The terminal will have a capacity of handling 200 ships and 1 million passengers per annum.
- Similar infrastructure upgradation is taking place in Goa, New Mangalore, Kochi, Chennai, Visakhapatnam, and Kolkata.

[8] https://tourism.gov.in/

[9] https://pib.gov.in/PressReleaseIframePage.aspx?PRID=1825354

Adventure Tourism

Adventure tourism involves exploration or travel to remote and exotic areas. Any constructive activity which tests the endurance of both a person and his equipment to its extreme limit is termed as Adventure. Adventure tourism is rapidly growing in popularity as a tourist seeks different kinds of vacations. It encompasses Land based, Air based, and Water based adventurous activities.



Land based Adventure Tourism: All-Terrain Vehicle Tours (ATV), Bungee Jumping, Cycling Tours, Camel Safaris, Horse Safaris, Jeep Safaris, Motorcycle Tours, Mountaineering, Nature Walks / Bird Watching, Rock Climbing / Artificial Wall Climbing & Abseiling, Personal Light Electric Vehicle Tours, Skiing / Snow Boarding, Trekking, Wildlife Safaris, Zip Wires and High Ropes Courses.



Air Based Adventure Tourism: Hot Air Ballooning, Paragliding / Hand Gliding, Para Motoring, Parasailing, Ski Diving, Air Safaris, Kite Boarding



Water Based Adventure Tourism: Kayaking / Sea Kayaking, Rafting, River Cruising, Scuba Diving, Snorkelling, Water Sports Centres, Essentials

Top destinations: Rishikesh, Ladakh, Kovalam, Auli, Manali, Spiti Valley, Andaman, Goa, and Sikkim etc.

Government Initiatives

- Ministry of Tourism has formulated a National Strategy for development of sustainable tourism, adventure tourism and ecotourism
- A National Board for Adventure Tourism has been constituted
- The Ministry of Tourism has issued Guidelines for the Approval of Adventure Tour Operators, which is a voluntary scheme, open to all bona-fide Adventure Tour Operators



Medical and Wellness Tourism

Medical Tourism (also called medical travel, health tourism or global healthcare) is a term used to describe the rapidly growing practice of travelling across international borders to obtain healthcare Services typically sought by travellers include elective procedures as well as complex specialized surgeries such as joint replacement (knee/ hip), cardiac surgery, dental surgery, and cosmetic surgeries. However, virtually every type of healthcare, including psychiatry, alternative treatments, and convalescent care is available in India.

Top destinations:

- Ananda, Rishikesh, Uttarakhand
- Ayurvedagram Heritage Wellness Center, Karnataka
- The Leela, Kovalam, Kerala
- Shreyas Yoga Retreat, Karnataka
- Vana, Dehradun, Uttarakhand
- Devaaya, Goa
- Sarovaram Ayurvedic Health Center, Ashtamudi
- Atmantan, Pune, Maharashtra
- Indus Valley Ayurvedic Center, Mysore, Karnataka
- Nimba Nature Cure, Mehsana, Gujarat



Government Initiatives

- Ministry of Tourism has formulated a National Strategy and Roadmap for Medical and Wellness
- Ministry of Tourism, releases global print, electronic and online media campaigns and Digital promotions are also regularly undertaken through the Social Media accounts of the Ministry on different themes including the theme of Medical Tourism.
- 'Medical Visa' has been introduced, which can be given for specific purpose to foreign travellers coming to India for medical treatment. 'E- Medical Visa' and 'E-Medical Attendant Visa' have also been introduced.
- Ministry of Tourism provides financial Assistance under Market Development Assistance Scheme to Medical Tourism Service Providers accredited by NABH for participation in Medical/ Tourism Fairs, Medical Conferences, Wellness Conferences, Wellness Fairs, and allied Road Shows.
- In order to provide dedicated institutional framework to take forward the cause of promotion of Medical Tourism, Ministry of Tourism has constituted a National Medical and Wellness Tourism Board with the Hon'ble Minister (Tourism) as its chairman.

Golf Tourism

In India golf as a sport begun once it was introduced by the British. After Great Britain, India was the second golf playing nation in the world and the 'Royal Calcutta Golf Club' was the oldest golf club outside Britain which was founded in 1829. Post this, 'Bangalore Golf Club' (1876) and 'Shillong Golf Club' (1886) were also constructed during British rule. Golf as a sport has grown a lot in India since then. From around ten to twelve golf clubs in 19th century, the Country now has about 160 golf courses. India now hosts 'Hero Indian Cup' which is one of the leading golf tournaments in whole Asia. Golf competition was included in Asian games for the first time in 1982 and it was India (Delhi) that hosted the competition.

Top destinations: Royal Calcutta Golf Club, Delhi Golf Club, Bangalore Golf Club, Shillong Golf Club, Gulmarg, Bombay, Gurugram, Ranikhet

Government Initiatives:

- The Ministry of Tourism has framed guidelines for extending financial support for promotion of golf tourism.

- The Ministry invites Expressions of Interest (EOI) from the Golf Clubs, Golf Event Managers, State Governments/ UT Administrations, Approved Tour Operators/ Approved Travel Agents and Corporate Houses seeking financial support from the Ministry of Tourism for Golf Events, Golf Shows, Golf Promotional Workshops/ Events/ Annual Meetings/ Seminars eligible for financial support, with a view to promote Golf Tourism to and/or within India under Incredible India brand as well as to provide an opportunity for these events to use the association with the Incredible India brand to achieve international standards. Applications received through EOI are evaluated by the India Golf Tourism Committee (IGTC) headed by Secretary (T) in its meetings held from time to time.





Meeting Incentives Conferences and Exhibitions (MICE)

MICE is business tourism at its finest, aimed at bringing together top professionals from every sector in an enhanced, tailor-made hospitality setting. MICE have emerged as a new phenomenon to aid to the thriving Tourism Industry of emerging Tourism Destinations. India is one such. MICE Tourism works in various fields like planning and managing corporate meetings, as convention department of hotels, conference centres or cruise ships, organizing international seminars and conferences of government and corporates, food and beverage management, private tour operations; incentive meetings; for professional trade organizations; tourism boards, tourism trade associations and much more.

Top destinations: Delhi, Varanasi, Goa, Hyderabad, Lucknow, Chennai, Agra, Jaipur, Srinagar, Mumbai, Kolkata, Bhubaneshwar, and Kochi

Government Initiatives:

- Ministry of Tourism has formulated a National Strategy and Roadmap for MICE Industry to promote the growth of MICE industry in the country and India as a MICE destination.
- An India MICE Board has been constituted.
- The Ministry of Tourism has developed guidelines for extending financial support under Market
- Development Assistance (MDA) scheme to 'Active Members' of India Convention Promotion
- Bureau (ICPB) towards bidding for International Conferences/ Conventions, thereby bringing more MICE business to the country.
- Under the scheme, associations/societies are given financial support on winning the bid or obtaining second and third positions in the bidding process, subject to the terms and conditions.
- Ministry of Tourism in association with ICPB organised the MICE Roadshow at Khajuraho in March 2021 to bring the domestic buyers and suppliers of the industry on this platform to reiterate India's strengths as a MICE destination.
- 'Meet in India', a distinct sub-brand under 'Incredible India' to promote the country as a MICE destination was launched during the Khajuraho MICE Roadshow.
- The sub brand will sharpen promotional campaigns to position India as an attractive MICE destination with all prerequisites - excellent connectivity, world class infrastructure, a knowledge hub and unique tourist attractions.



Eco Tourism

Ecotourism is a preserving travel to natural areas to appreciate the cultural and natural history of the environment, taking care not to disturb the integrity of the ecosystem, while creating economic opportunities that make conservation and protection of natural resources advantageous to the local people. India has a significant geographical advantage owing to its rich natural & Eco-tourism resources:

- 70 percent of the Himalayas
- 7,000 km of coastline
- Among the one of the three countries in the world with both hot and cold deserts
- Ranks 10th in total area under forest cover.
- Ranks 6th in terms of the number of recognized UNESCO Natural Heritage sites.

Top destinations: Jammu & Kashmir, Sikkim, Himachal Pradesh, Uttaranchal, Coorg, Himalayas, Garhwal, Goa, Kerala, Kodaikanal, Bandhavgarh National Park, Kanha National Park, Corbett National Park, Ranthambore Wildlife Sanctuary, Periyar National Park, Kaziranga National Park

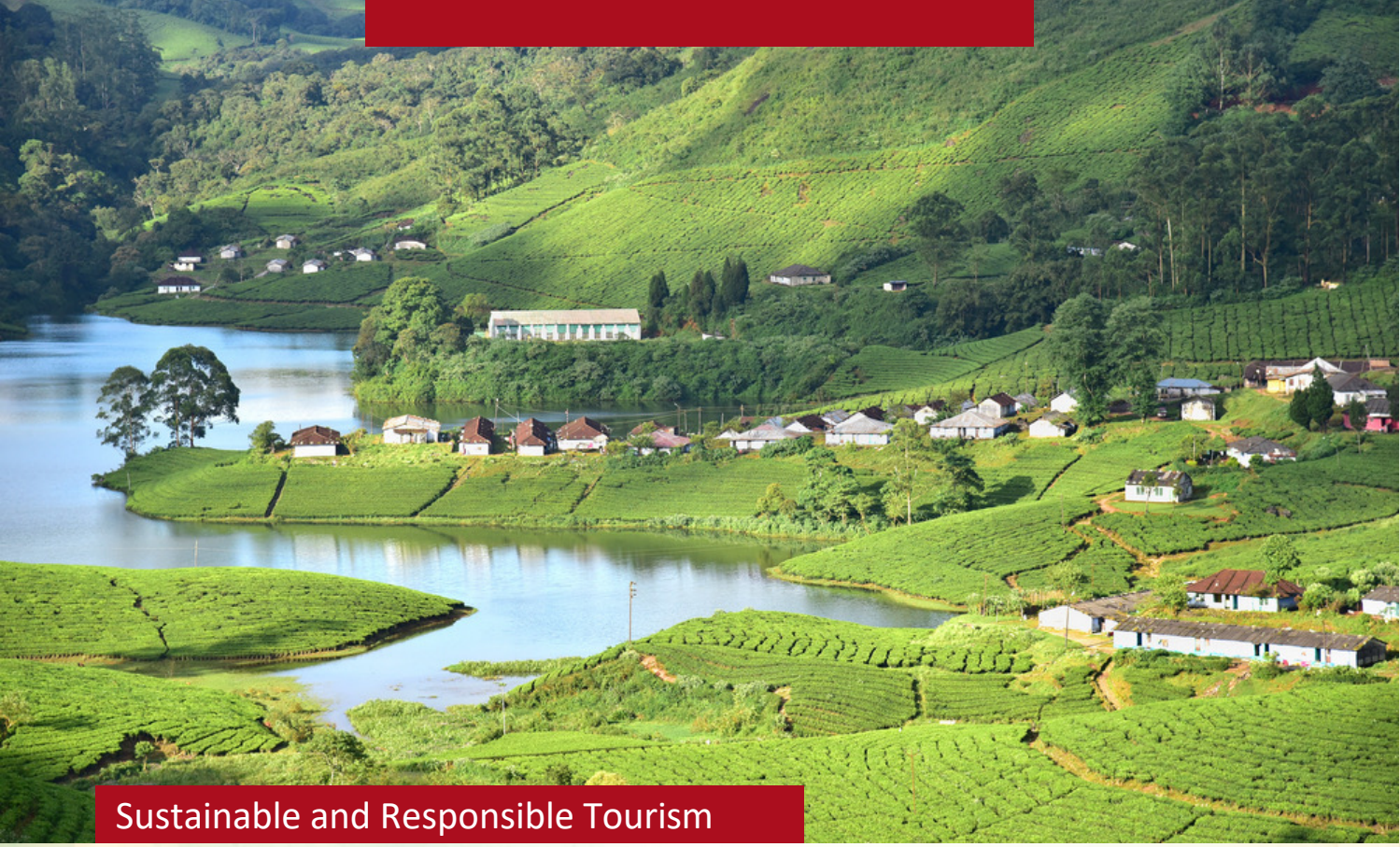
Government Initiatives

- Ministry of Tourism has formulated a National Strategy for Ecotourism.
- A National Board for Sustainable Tourism has been constituted to guide the operationalisation and implementation of various strategic initiatives for development of sustainable tourism and Eco- tourism in the Country.
- The government has designated ecotourism as a 'thrust industry' in states such as Jammu & Kashmir, Sikkim, Himachal Pradesh, and Uttaranchal.
- A range of incentives are available for ecotourism projects such as hotels, resorts, spas, entertainment/amusement parks and ropeways.

Projects Initiated for Ecotourism Development in India

- Development of Horsely Hill in the Chittor district of Andhra Pradesh has been sanctioned.
- Development of Satkosi in Orissa (Rs. 4.25 crore) has been approved. The following are proposed under the project: building an interpretation centre; landscaping; elephant camps; trekking park; watch towers; parking facility; etc.
- The Ministry of Tourism (MOT) has sanctioned Rs. 2.63 crore for an ecotourism project in Morni- Pinjore Hills and Sultanpur National Park in Haryana.
- The project on integrated development of tribal circuit, with focus on ecotourism in Himachal Pradesh, has been approved for Rs. 6.98 crore.
- Expansion of Wayanad in Kerala for Rs. 2.01 crore.
- Development of Tourist Circuit (Western Assam Circuit) Dhubari Mahamaya-Barpeta-Hajo has been sanctioned for Rs. 4.97 crore.
- Expansion of Mechuka destination (Rs. 4.41 crore in Arunachal Pradesh).
- Development of tourist destination in Khensa for Rs. 4.58 crore in Nagaland Circuit Udhyamandalam-Madumalai-Anaimalai, Tamil Nadu.
- Jungle Lodges and Resorts, Karnataka (provides experience of living in the wilderness).
- Private initiative in Kerala-Casino Group of Hotels, Tours India Ltd. (adopted 2 tribal villages in Periyar Tiger Reserve for growing indigenous pepper to help local communities realise financial gains).
- GEF Project-Gulf of Mannar, Tamilnadu (ecotourism as an alternative method of livelihood and preservation of biodiversity in the region).
- Sikkim Biodiversity and Ecotourism Project (developing collaboration between TAAS, local orgs., and communities for biodiversity, conservation, and income generation).
- Periyar Tiger Reserve, Kerala–India Ecodevelopment Project, Corbett–Binsar–Nainital Ecotourism Initiative (Uttarakhand), and Great Himalayan National Park, HP – Eco Development Project (promoting participation of local communities in biodiversity conservation through incentive-based mechanisms)[10]

[10] https://www.ibef.org/blogs/ecotourism-a-model-to-reboot-tourism



Sustainable and Responsible Tourism

Sustainable tourism is defined by UNWTO (United Nations World Tourism Organization) as "Tourism which benefits its current economics, future economic, social impacts and environmental impacts, and also addresses the needs of tourists, tourism industry, the environment and host communities". The need for Sustainable-Tourism increased due to the impact of increased human activity on the climate and environment. It helps to increase the positive impact of tourism activities.

Top destinations: Sikkim, Meghalaya, Kerala, Nagaland, Assam, Maharashtra, Karnataka, Delhi

Government Initiatives

- Ministry of Tourism has formulated National Strategy document for Sustainable Tourism.
- A National Board for Sustainable Tourism has been constituted to guide the operationalization and implementation of various strategic initiatives for development of sustainable tourism in the Country.
- The Ministry has signed a Memorandum of Understanding (MoU) with the United Nations Environment Programme (UNEP) and Responsible Tourism Society of India (RTSOI) on 27th September 2021 on World Tourism Day. The purpose of the MoU is to undertake measures to actively promote and support 'sustainability initiatives' in the tourism sector of each other and work in a collaborative manner wherever possible.
- The Ministry of Tourism also organised a national summit for developing Sustainable and Responsible tourism Destination and Responsible Traveller Campaign in association with RTSOI and UNEP on 4th June 2022 at New Delhi on eve of World Environment Day.
- To create mass awareness Ministry in collaboration with IITTM (Central Nodal Agency- Sustainable Tourism) has launched Travel for LiFE Pledge on MyGov.in and monthly e –newsletters are also being sent to State Governments / UT Administrations and Industry stakeholders.

- Ministry of Tourism has launched Pilot STCI certification on NIDHI+ portal for Accommodation Units. The Certification for Tour Operator and Destinations will be launched soon.

- Swadesh-Darshan plan was initiated by the Govt for making theme related tourism.

- The Prasad project launched by Govt for the development of pilgrimage/spiritual sites.

- The Ministry has developed a mobile application known as Swachh- Paryatan in February 2016, which allows people to report any hygiene issues at various tourist places.

- The Ministry of Tourism gave a 24×7 Toll Free Tourist Helpline in many languages in February 2016. It doesn't only include Hindi and English languages, but it also has 10 other international languages.

- To promote the North-eastern states an International Tourism Mart is organized every year with the objective to highlight the tourism potential in these regions.

- Adarsh Smarak: ASI has identified several monuments to develop them like a Model Monument. Govt will provide all the basic facilities like Wi-Fi, security, invasion free areas, showing films to give knowledge about the importance of these monuments and aware them about the importance of movements like Swachh Bharat Abhiyaan.





Film Tourism

Film Tourism' is when a viewer gets induced to visit a particular location after seeing it in a movie. It refers to the growing interest among public for the places which became popular owing to their presence in certain scenes of movies. India is the largest producer of films in the world. Generally called as the Bollywood, the tinsel town of India is counted only after the Hollywood. With diversity in culture, India produces movies in a wide range of languages. The Indian movies leave a huge impact on the minds of viewers, may it be in the form of techniques used, angles shot or locations.

Top destinations: Goa, Rajasthan, Jammu and Kashmir, Delhi, Maharashtra, Gujarat, Karnataka, Hyderabad, Madhya Pradesh

Government Initiatives

- The Ministry of Tourism has issued guidelines for extending financial support to State Governments/ Union Territory Administrations, for promotion of 'Film Tourism'. The financial assistance is provided up to Rs.2.00 Lakh per film for components such as Space Hiring/Filming charges, Facilitation Fee etc.

- In an endeavour to establish India as a filming destination, the Ministry of Tourism is making all efforts to promote Cinema of India as a sub-brand of "Incredible India" at various International Film Festivals like IFFI Goa, European Film Market, Cannes Film festival and markets abroad, to develop synergy between Tourism and the film industry and to provide a platform for enabling partnerships between the Indian and global film industry.

- Ministry has supported Global Film Festival Sikkim held from 28th February to 1st March 2020 to showcase Film Tourism.

- The Ministry of Tourism and Ministry of I&B hold Film Tourism Symposium in Mumbai on 8th November 2021 to promote domestic locations as preferred filming destinations.



Rural Tourism

Rural Tourism is an activity that takes place in non-urban areas that showcases the art, culture, heritage, and native life at the rural locations. Activities in which the visitors experience a wide range of products and services linked to nature and agriculture like farming, fishery, craft, and various aspects of rural lifestyle. India's large part is rural, and a large population resides in rural areas. The village life in India is where you meet the real India. So, the Rural tourism has a high potential to stimulate rural India's economic growth and social change, because of its complementarity with other activities like, creation and retention of jobs, creation of new business opportunities, revitalization of local art and crafts being aligned with the vision of "Atmanirbhar Bharat" and with the mantra of "Vocal for Local".

Top destinations: Chusul, Karzok, Mana, Niti, Malari, Gunji, Lachen, Lachung, Gnathang, Zemithang, Chayangtajo, Taksing, Tuting, Kibithoo

Government Initiatives

- Ministry of Tourism has notified National Strategy for Rural Tourism and Rural Homestays dated 29th April 2022, based on overarching theme of sustainable and responsible tourism.
- The Ministry has designated Indian Institute of Tourism and Travel Management (IITTM) as Central Nodal Agency (CNA-RT) for assisting the Ministry in the implementation of the Strategy.
- A Task Force for development of Rural Tourism and Rural Homestays has been set up in June 2022 with Secretary (Tourism) as Chairman to act as a forum for resolving issues related to development and promotion of Rural Tourism and Rural Homestays in the country.
- CNA-RT conducted workshop for States to build technical skills to upload Rural Tourism and Rural Homestays on NIDHI+ to build central database for Rural Tourism and Rural Homestays.
- Ministry of Tourism, in collaboration with CNA-ST, conducted Stakeholder Consultation Meeting for Rural Homestay Development.

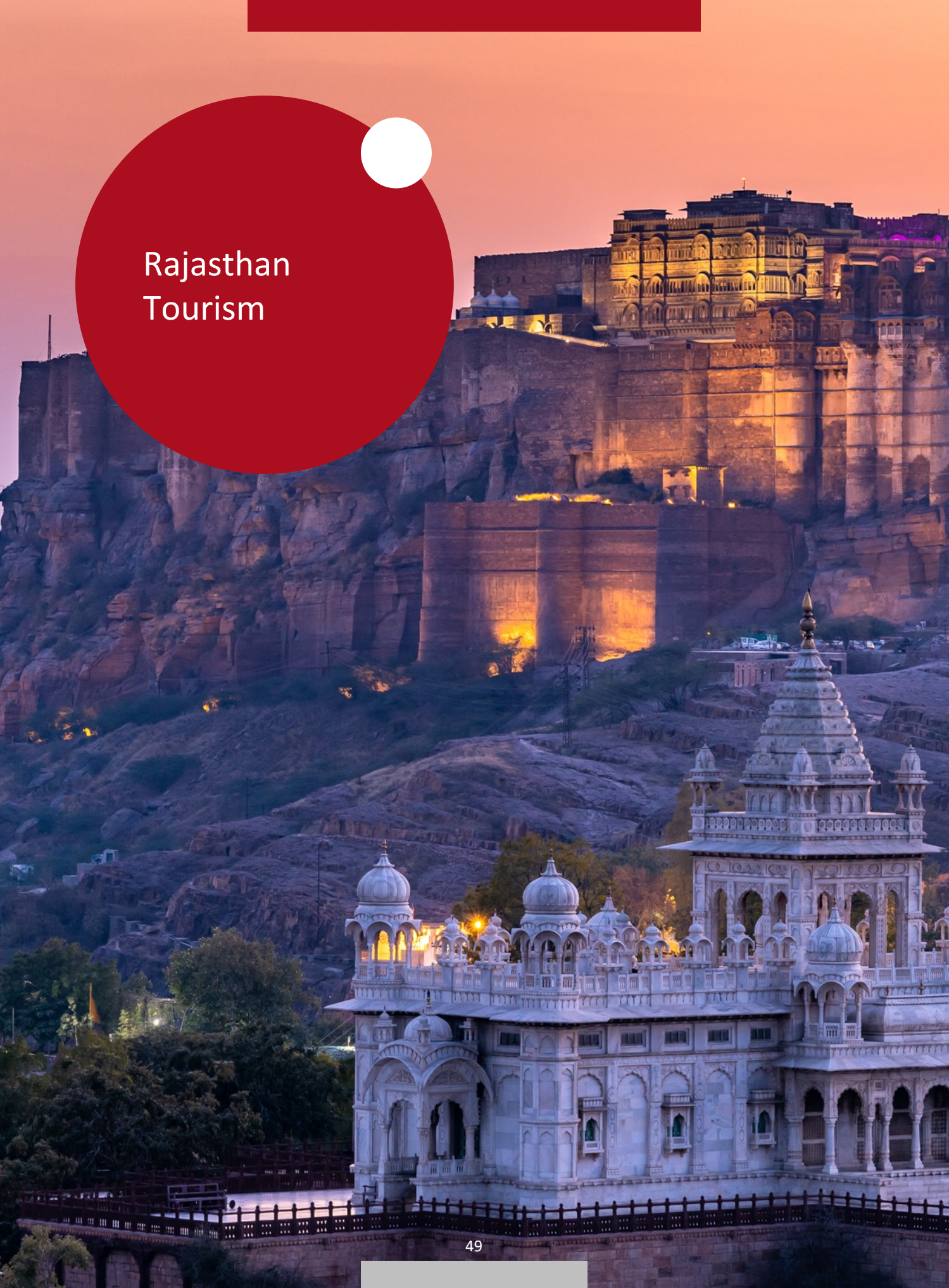
Major Industrial Initiatives:

- Agricultural Development Trust of Baramati: It focuses on farming community's growth using cutting- edge agricultural technologies combined with extension, demonstration, teaching, and upcoming research. And utilizing innovation and knowledge exchange between India and other nations, to address local and international requirements and difficulties in the agriculture industry.

- WWOOF Global Village (WGV)– Surajpur, (Near Khajuraho) Madya Pradesh: The objective of WGV is to promote the rural tourism and introduce place of tourist interest and to introduce Indian historical and cultural heritage to low budget tourists. It closely works with the farmers in various clusters of villages in development of organic agriculture, education for children, local handicrafts, and other village developmental activities.

- Culture Aanagn: Culture Aangan is committed to grassroots development projects in the fields of Rural Agri-community tourism, the revival of traditional art and culture, and education. There efforts are focused on sustaining economic development while maintaining the culture, history, and traditions of the local population and their environment. The mission is to promote Agri - Rural Tourism, if developed in a sustainable manner it will create new job opportunities, controls the migration of youth from rural India to urban India in search of livelihood. One such Village Diaries of Culture Aangan is Chitari.

- Village Ways: Village Ways is a unique kind of tourism that works in partnership with villages to create a local tourism enterprise. With the help of funding from Village Ways, villagers can own and manage their own tourism businesses. This type of tourism helps preserve local culture, traditions, and environment while providing economic benefits to the village.


Rajasthan
Tourism

The state of Rajasthan is known for its diversity in terms of natural resources, cultural heritage, historical as well as archaeological wonders and rare wildlife. The forts and palaces, heritage hotels, colourful fairs and festivals, local art, and handicrafts, etc. have been a unique selling proposition for tourists coming to the state. The desert landscape in the western parts of the state, known as the Thar Desert, is also a major attraction for visitors, particularly foreign tourists.

Four decades ago, Rajasthan's tourism industry catered primarily to elite foreign tourists and domestic pilgrims, on a smaller scale compared to today. Tourist arrivals were restricted to a few thousand tourists annually and were primarily recorded in select places such as Jaipur, the state capital, Udaipur, and Jodhpur (for foreign tourists) and the pilgrim centres of Ajmer, Pushkar and Nathdwara (for domestic tourists). The employment in the sector and the sector's contribution to the state economy, as well as employment potential, were limited.

However, over the last few decades, due to the focused efforts of Rajasthan Tourism, various State Government agencies and select entrepreneurs/individuals, tourism has grown from an elite and pilgrim phenomenon to a mass phenomenon putting Rajasthan firmly on the foreign and domestic tourist map.

Compared to the past, when tourism in the state consisted of desert tourism, heritage tourism (forts, palaces, etc.) and pilgrim tourism, today’s tourists, in Rajasthan, have a wide canvas of places, attractions and activities to choose from, which enriches their overall tourism experience.



Types of Tourism in Rajasthan

Table 7: Types of Tourism in Rajasthan			
Heritage Tourism	Wildlife and Eco-Tourism	MICE Tourism	Wellness Tourism
Experiential Tourism	Tribal Tourism	Weekend Getaway Tourism	Roots Tourism
Desert Tourism	Cultural Tourism	Religious Tourism	Rural Tourism
Adventure Tourism	Crafts & Cuisine Tourism	Wedding Tourism	Film Tourism

Major Tourist Destinations in Rajasthan

Tourism in Rajasthan extends almost through the entire state, though tourist activity is concentrated around six main cities, which serve as 'tourist hubs' for places of tourist attraction in and around these 'hubs. These tourist 'hub' cities are Jaipur, Jodhpur, Jaisalmer, Bikaner, Udaipur, and Mount Abu.

Table 8: Tourist hubs in Rajasthan



Jaipur is a part of the popular 'Golden Triangle' circuit (Delhi-Agra-Jaipur) that is very popular with the foreign tourists



Jodhpur, Bikaner and Jaisalmer form the popular 'Desert Circuit' of Rajasthan



Udaipur is the entry point into south Rajasthan and forms the hub for tourist activity in the Mewar region of the state.



Mount Abu, the only hill station in Rajasthan, is largely a standalone tourist destination for domestic tourists (especially from Gujarat but also Western India)

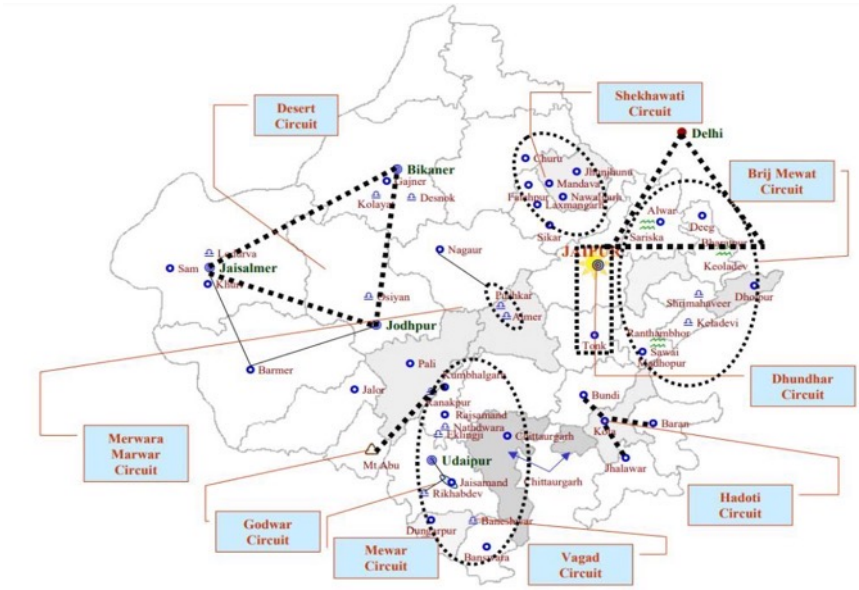


Figure 30: Tourism map of Rajasthan - Major Tourist Circuits
Source: https://tourism.gov.in/rajasthan

Table 9: Major Tourist circuits in Rajasthan

Circuit	Season	Main Tourist Location	Main Attractions/Tourism Experience	Other places of Tourist Interest
Desert Circuit	Oct-Mar	Jodhpur, Jaisalmer, Bikaner	Sand dunes and desert experience, Two unique forts Palaces and carved Havelis	Osiyan (near Jodhpur), Sam and Khuri dunes, Lodurva Jain temples (near Jaisalmer), Gajner Palace and WLS, Deshnok Karni Mata temple (near Bikaner) Barmer
Mewar Circuit	Sept-Mar	Udaipur, Chittaurgarh, Nathdwara, Kumbhalgarh	Leisure, history and pilgrim Lakes, few forts, and palaces Pilgrim centres	Jaisamand Lake, Jagat and Nagda temple ruins, Rana Pratap memorials (near Udaipur), Wildlife sanctuary (near Kumbhalgarh)
Vagad Circuit	Sept-Mar	Dungarpur, Banswara	Tribal culture, fairs and festivals, forts and palaces and nature	Baneshwar, Galiyakot (near Dungarpur), Mahi Dam, Arthuna (near Banswara)
Godwar Circuit	Feb-June Sept-Dec	Mount Abu Ranakpur	Leisure: Mount Abu, the only hill station in Rajasthan Pilgrim: Ranakpur, one of the five holy Jain places Delwara temples, Nakki lake	Gaumukh temple, Arbuda temple (near Mount Abu)

Circuit	Season	Main Tourist Location	Main Attractions/Tourism Experience	Other places of Tourist Interest
Dhundhar Circuit	Sept-Mar	Jaipur	Forts, palaces, havelis, gardens Jantar Mantar Observatory	Samode Palace and gardens, Abhaneri step-well, Sambhar Lake, Ramgarh Lake (near Jaipur)
Brij Mewat Circuit	Oct-Feb	Bharatpur, SMadhopur, Alwar, Sariska	Nature/ Wildlife tourism, Few forts, palaces, and lakes	Siliserh Lake Palace (near Sariska and Alwar, Deeg (near Bharatpur)
Merwara Marwar	Domestic: Throughout the year Foreign: Nov	Ajmer, Pushkar	Pilgrimage (Dargah Sharif and Pushkar Lake)	Lakes (in and around Ajmer), Kishangarh (on Ajmer-Jaipur route), Roopangarh (near Kishangarh), Nagaur Fort, Merta City (Nagaur district)
Shekhawat i Circuit	Sept-Mar	Sikar, Jhunjhunun	Frescos and painted havelis	-
Hadoti Circuit	Sept-Mar	Kota, Bundi, Jhalawar	Natural beauty Few forts, palaces, and temples	-

Of these circuits, the Jaipur (Dhundhar) Circuit, Desert Circuit and Mewar Circuit are well developed, whereas in other circuits, tourism is limited to cover of only 1-2 destinations rather than the circuit as a whole.

Rajasthan Tourist Traffic Trends

Domestic tourist inflow into Rajasthan has surged by 102% in the year 2022 compared to 2019, the last year before covid hit the country.

Cities such as Jaipur, Udaipur, Jodhpur and Jaisalmer are experiencing the highest number of tourists visiting historical sites and monuments. The popular Golden Triangle circuit (Delhi-Agra-Jaipur) has put Jaipur on the world tourism map with the city receiving the highest number of foreign tourists visiting the state.

Based on India Tourism Statistics Report 2022, Rajasthan's percentage share of Domestic Tourist Visit and Foreign Tourist Visit is 3.24% and 3.30% respectively. In terms of ranking, Rajasthan holds rank 11 for domestic tourist visit while for foreign tourist visit it is at 10th position in India.





Rajasthan Government Plans and Incentives for Tourism

Rajasthan Tourism Policy

The state has released Rajasthan tourism policy 2020 with a vision to reposition Rajasthan as a preferred tourism destination for both domestic as well as international tourists by offering tourists a high-quality experience, and through responsible and sustainable policies ensuring conservation of natural, historical, and cultural heritage of the State while simultaneously accelerating socio-economic development by improving livelihood opportunities for the local population. This shall be operational for the next 5 years. The objectives for Rajasthan Tourism Policy are:

- Promote Rajasthan as a leading tourism brand in national and international markets
- Strengthen and diversify existing tourism products
- Provide innovative tourism products and services with focus on lesser-known destinations especially in rural areas
- Improve the connectivity of tourist destination through road, rail and air
- Expand tourist accommodation infrastructure.
- Broad based promotion and marketing of tourism products.
- Facilitate tourism specific skills development to create gainful self-employment
- Create suitable mechanisms to promote effective interdepartmental coordination.
- Take steps to encourage private sector investment in the State.
- To provide a safe and secure environment for tourists and in particular women travellers and also improve tourist grievance redressal systems
- To empower the department with suitable administrative structure for extending approvals for establishment of tourism units.
- Market research and developing statistics grid development framework for better policy making and forecasting.



Additionally, the state has released Ecotourism policy 2021 operational for 10 years, aiming to develop sustainable tourism at potential eco-tourism spots in the state. The state has 3 National Parks, 3 Tiger reserves, 27 wildlife sanctuaries, 2 Ramsar site, 14 conservation reserves. And Rajasthan has released Rajasthan Film Tourism Promotion Policy 2022 which will be operational for 5 years with the objectives:

- To establish Rajasthan as a most film friendly state and an important destination for film shooting
- To increase cultural benefits such as screen tourism and branding of the state
- To generate employment opportunities and enhance skill development in the state.
- To promote production of quality films in Rajasthan language

Rajasthan State Government Tourism Initiatives

- In October 2019 Tourism department has signed an agreement with UNESCO for the project promoting Intangible Cultural Heritage and Developing Cultural Tourism in Jodhpur, Barmer, Jaisalmer and Bikaner districts in Rajasthan. Under this project 10 cultural spots will be developed.

- Tourism department is advertising its activities at national & international levels through various media for effective marketing of the state tourism.

- A project for development of Ecology Park is also under advance stage of completion with sanctioned cost of Rs. 13.59 crore in Laxmangarh (Sikar).

- To disseminate the knowledge of historic places to tourists, Sound and Light show/ laser water show projects has been developed at 9 historic places, namely Jai Niwas Garden (Jaipur), Machkund (Dholpur), Sanwaliya Seth (Chittorgarh), Kumbhalgarh Fort (Rajsamand), Chittorgarh Fort, Meera Bai Smarak (Merta), Pratap Gaurav Kendra (Udaipur), Gadisar Talab (Jaisalmer) and Ajit Vivek Museum, Khetri (Jhunjhunu).

- Sound & Light Show at Lohagarh Fort, Bharatpur with sanctioned cost of Rs. 250.00 Lakhs is under advance stage of completion. Light & Sound Show at Ajit Vivek Museum Khetri (Jhunjhunu) has already been commissioned.

- Under centrally sponsored scheme PRASAD ‘Swadesh Darshan 1.0’, Department of Tourism has developed tourism infrastructure across the State with capital expenditure of more than Rs. 300.00 Crore under Spiritual Circuit, Heritage Circuit, Krishna Circuit and Desert Circuit.

- Recently, Ministry of Tourism has sanctioned two more destinations under Swadesh Darshan 2.0 Scheme, namely Keshoraipatan (Bundi) and Jodhpur for which capital expenditure of approx. Rs. 140.00 Crore.

- Tourism Development Fund of Rs 1500 Crores has been created for development, Branding & Marketing of Rajasthan.

Rajasthan State Government Incentives to Tourism Units

Industry Status to Tourism & Hospitality Sector:

- Electricity Tariff on industrial rates - reduction in bills upto 30%
- Urban Development Tax on industrial rates - reduction in charges upto 80%
- Reserve price of RIICO plots for tourism units at par with Industrial plots
- Rate of land for stamp duty calculation for Tourism Units at par or below the industrial rates
- Building Plan Approval charges on industrial rates - reduction in charges upto 40%

Rajasthan Investment Promotion Scheme (RIPS) 2022

- MSME and Service Thrust Sector Benefits to Tourism Industry
- Investment Subsidy: 75% of SGST paid & deposited for 7 years
- 100% exemption for 7 Years – Electricity Duty, Land Tax, Stamp Duty, Conversion Charges
- Reimbursement of 50% of employer's contribution towards EPF and ESI for 7 years
- Interest Subsidy upto 6%
- Other incentives for water conservation, waste management, quality certification, etc.

Rajasthan Tourism Unit Policy 2015:

- No land conversion and development charges
- Double FAR/BAR
- Heritage certification to hotels entitling subsidized bar license fee
- Duration of licenses to operate the tourism unit extended to 10 years

Rajasthan Rural Tourism Units:

- Land use change & building plan approval not required
- 100% exemption in stamp duty (75% upfront + 25% reimbursement)
- Reimbursement for 100% SGST paid for 10 years
- 9% Interest subsidy on loans upto Rs. 25 Lakhs

Rajasthan Film Tourism Promotion Policy 2022:

- Subsidy (upto Rs. 2.00 Cr.) for film shooting in the State
- Special incentive for Rajasthani Language films
- Exemption from all fee & charges at Govt. monuments, locations & properties
- Single Window Clearance for shooting permission

Mukhyamantri Laghu Udhyog Protsahan Yojana (MLUPY):

- Interest subsidy:
- 8% - for Loan upto Rs. 25 Lakhs
- 6% - for Loan (Rs. 25 Lakh to Rs. 5 Cr)
- 5% - for Loan (Rs. 5 to 10 Cr)

Institutional Framework for Tourism Development

The State Government through its various departments and with assistance from the Central Government agencies is engaged in the task of creating tourism assets, managing them, and promoting tourism in Rajasthan. The existing institutional framework for tourism development and promotion in Rajasthan can be presented as:

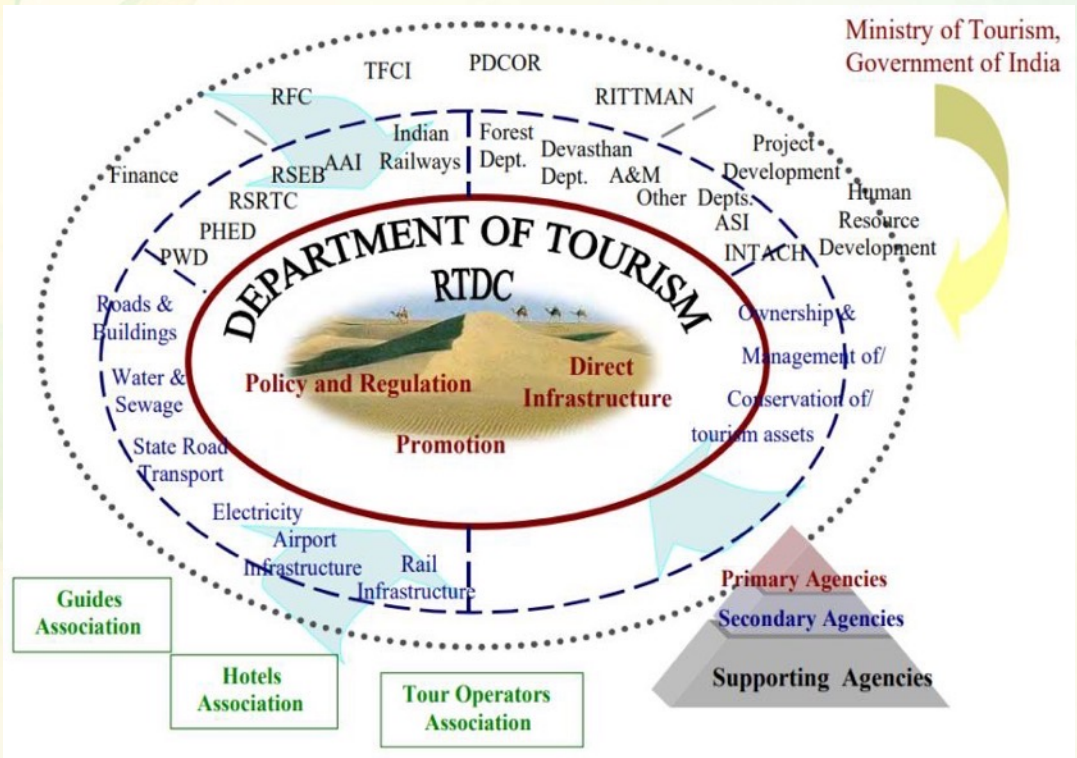


Figure 32: Institutional framework for Tourism in Rajasthan
Source: Final Report on Perspective Plan for Tourism in Rajasthan (MoTAC-Department of Tourism)

There are agencies at three levels engaged in activities related to tourism development and promotion. These three levels and the agencies therein are described as:

The Primary Agencies (State Level): Primary agencies involved directly in development and promotion of tourism are Department of Tourism, Art, and Culture (DoT), Rajasthan, Rajasthan Tourism Development Corporation Ltd - RTDC and Rajasthan State Hotels Corporation Limited - RSHCL (DoT undertakings) and Rajasthan Institute of Tourism and Travel Management - RITTMAN (Autonomous body).

The secondary agencies: They include the agencies that provide infrastructure/ support for tourism in the state, centre etc., and

The Support Agencies: They accelerate the growth of the tourism industry in India by providing financial assistance for tourism activities or implementing infrastructure projects in the state on a commercial format. Few of them are Tourism Finance Corporation of India (TFCI), Project Development Corporation Limited (PDCOR) and Rajasthan Financial Corporation (RFC) etc.



Rajasthan Film Tourism Promotion Policy 2022

This Policy is in two parts:

Part-1: covers promotion of production of films e.g. Bollywood, Hollywood, etc. (primarily the films in language other than Rajasthan language)

Part:-2: covers promotion of Rajasthani languages films

Part - 1

Objective:

- To establish Rajasthan as a most Film friendly State
- To generate employment opportunities in film sector in Rajasthan

Administrative Department:

- Department of Tourism, Government of Rajasthan

Incentives under Policy:

- Subsidy of Rs. 2.00 crore or 15% of total Qualified Cost of Production (QCOP) whichever is lower.
- Exemption from all fees and charges applicable for film shooting at all monuments, locations and properties of Govt. of Rajasthan
- Accommodation to Film crew @ 50% discount (subject to maximum Rs. 10.00 Lakhs) at Govt of Rajasthan owned guest houses, circuit houses, hotel corporations (RTDC/RSHC)

Eligibility Criteria for availing Financial Incentives:

- Film means feature films /T.V. serials/ T.V. shows, Web series, reality show/ documentaries certified by CBFC (in U or U/A category)
- At least 15% crew should be hired from Rajasthan
- More than Rs. 2.00 Crore of the Qualified Cost of Project (QCOP) should be incurred in Rajasthan.
- Due credit to State Government and Department of Tourism is mandatory

Part – 2
(Rajasthani Language Film Tourism Promotion & Subsidy Policy – 2022)

Objective:

- To promote production of quality films in Rajasthani language
- To Promote Rajasthan's art & culture

Administrative Department:

- Department of Art & Culture, Government of Rajasthan

Financial Incentives under Policy:

- Rajasthan language films to ranked/ categories (from A+ to C ranks) by Film Screening Committee on various parameters such as story, direction, acting, music, cinematography, choreography, etc.

Film Rank	Subsidy
A+	Rs. 25.00 Lakhs OR 25% of Direct Cost of Film Production whichever is lesser
A	Rs. 15.00 Lakhs OR 25% of Direct Cost of Film Production whichever is lesser
B	Rs. 10.00 Lakhs OR 25% of Direct Cost of Film Production whichever is lesser
C	Rs. 05.00 Lakhs OR 25% of Direct Cost of Film Production whichever is lesser

- Single Window Clearance
- 100/% Refund of SGST
- Rs. 1.00 Crore financial assistance to the Films which is awarded "Sawran Kamal" award by GoI OR international award to Film
- Rs. 50.00 Lakhs financial assistance to the Films which is awarded "Rajat Kamal" award by GoI

Eligibility Criteria for availing Financial Incentives:

- At least 30% of the total in the films should be local actors/technicians (from Rajasthan), i.e., those born in Rajasthan or who are native to Rajasthan.
- At least 80% of the outdoor shooting schedule of the concerned Rajasthani film will be required in Rajasthan
- At lease 30% of the direct production cost of the film concerned must have been spent in Rajasthan

Rajasthan Rural Tourism Scheme 2022

Commendable Step by Government of Rajasthan to Promote Rural Tourism and Employment

(Approved by Cabinet)

Main Highlights

The Government of Rajasthan has taken up several concrete steps to promote tourism in rural areas which will attract tourists to come to the State as well as create employment opportunities at large scale.

- To promote tourism in the State, Honorable Chief Minister has taken-up several steps. In the budget for the year 2022-23 **'Rajasthan Rural Tourism Scheme 2022'** was one of the major important announcement**.**

- This Scheme covers the tourism units in the rural areas such as guest houses, agro-tourism units, paying guests (home stay), camping sites, caravan parks. Under this Scheme rural tourism units will be promoted, which will enable domestic and foreign tourists to experience rural culture of Rajasthan as well as encouraging employment opportunities in rural areas.

Salient Features of the Scheme are given below:

- Rural tourism units will be permissible in the area outside the municipal area where the Gram Panchayat is functioning.

- Scheme covers setting-up of rural tourism units such as guest houses, agro-tourism units, paying guests (home stay), camping sites and caravan parks.

- Under this scheme rural guest house, agri tourism units, caravan park and camping sites projects will be approved and registered.

- Project approval of agro tourism units, caravan parks, camping sites will be done in 45 days. Project construction must be completed within 3 years of project approval. Post completion of project, tourism unit will be registered.

- On receipt of the registration application, the temporary registration will be issued by the Tourist Reception Center within 07 working days, if not the unit will be deemed approved. On the basis of this application, the applicant will be able to operate the unit for 6 months.

- After the temporary registration, the concerned officer will inspect the rural tourism unit within 03 months and inform the applicant to fulfill the remaining qualifications/requirements, which will be completed by the applicant in a maximum of 3 months. After completion of all the qualifications/requirements registration will be issued by the Tourist Reception Centre.

- The applicant will have to give self-certification that all the documents given for the application are correct. If any kind of wrong information is given or hidden, then the Department will have full right to cancel the application.

- Registration and renewal of tourism units will be for two years.

- The facility of online application and payment will be started by the Tourism Department till then offline applications will be accepted.

Benefits of Rural Tourism Units:

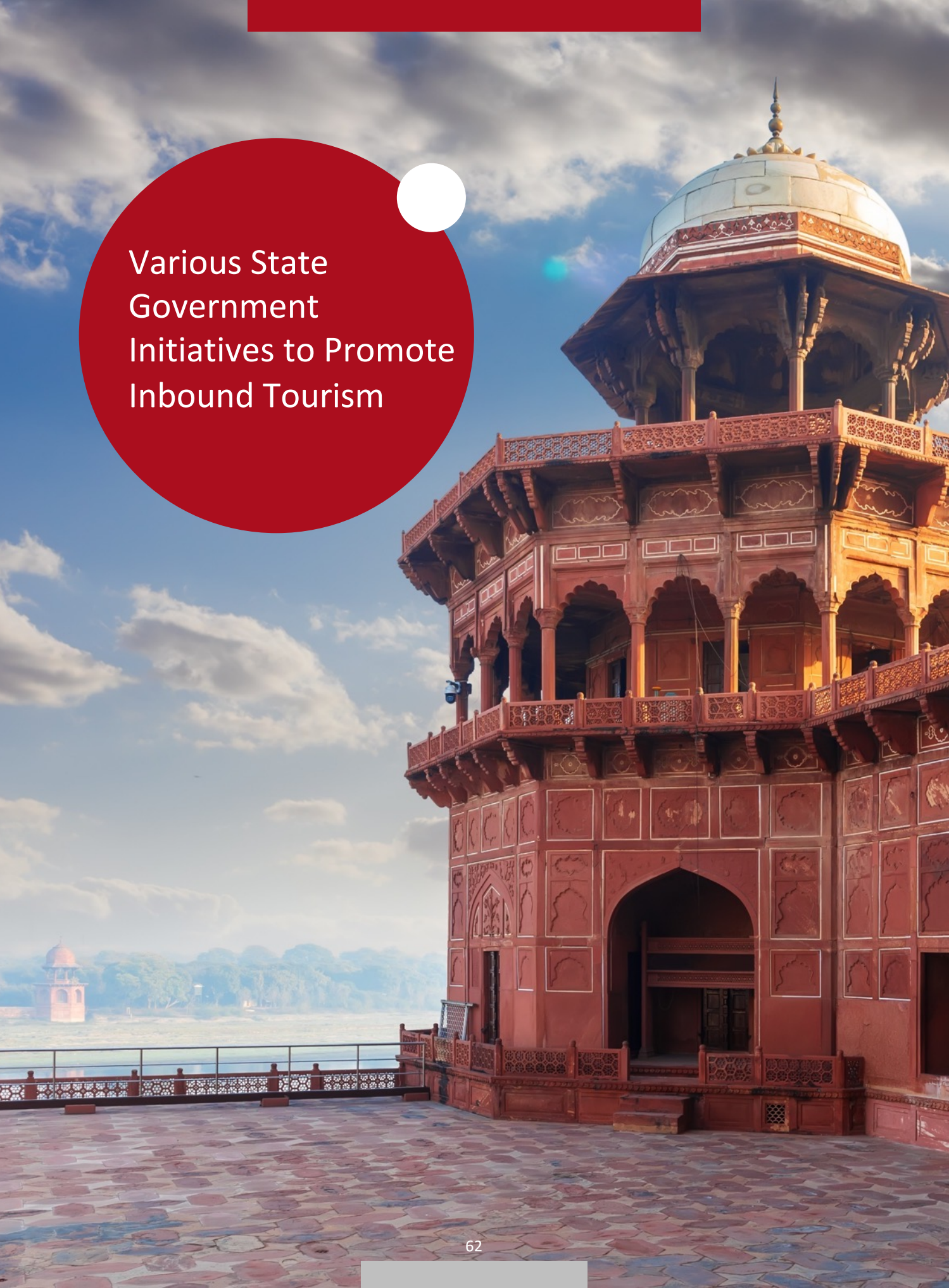
- 100% exemption of stamp duty will be provided. Initially 25 percent stamp duty shall be payable; On submission of certificate of the tourism unit stamp duty will be refunded.
- 100 percent reimbursement of the payable and deposited SGST will be done for 10 years.
- Under "Mukhya Mantri Laghu Udhyog Protsahan Yojana" in place of 8% interest now 9% interest subsidy will be given upon loan up to 25 lakhs.
- The need for land conversion and building plan approval for rural tourism units is not required.
- Promotion of rural tourism in the area under the Forest Department will be done as per the provisions of Rajasthan Eco-Tourism Policy, 2021.
- Projects established by local folk artists and artisans and rural start-ups will be given priority in approval and benefits payable.

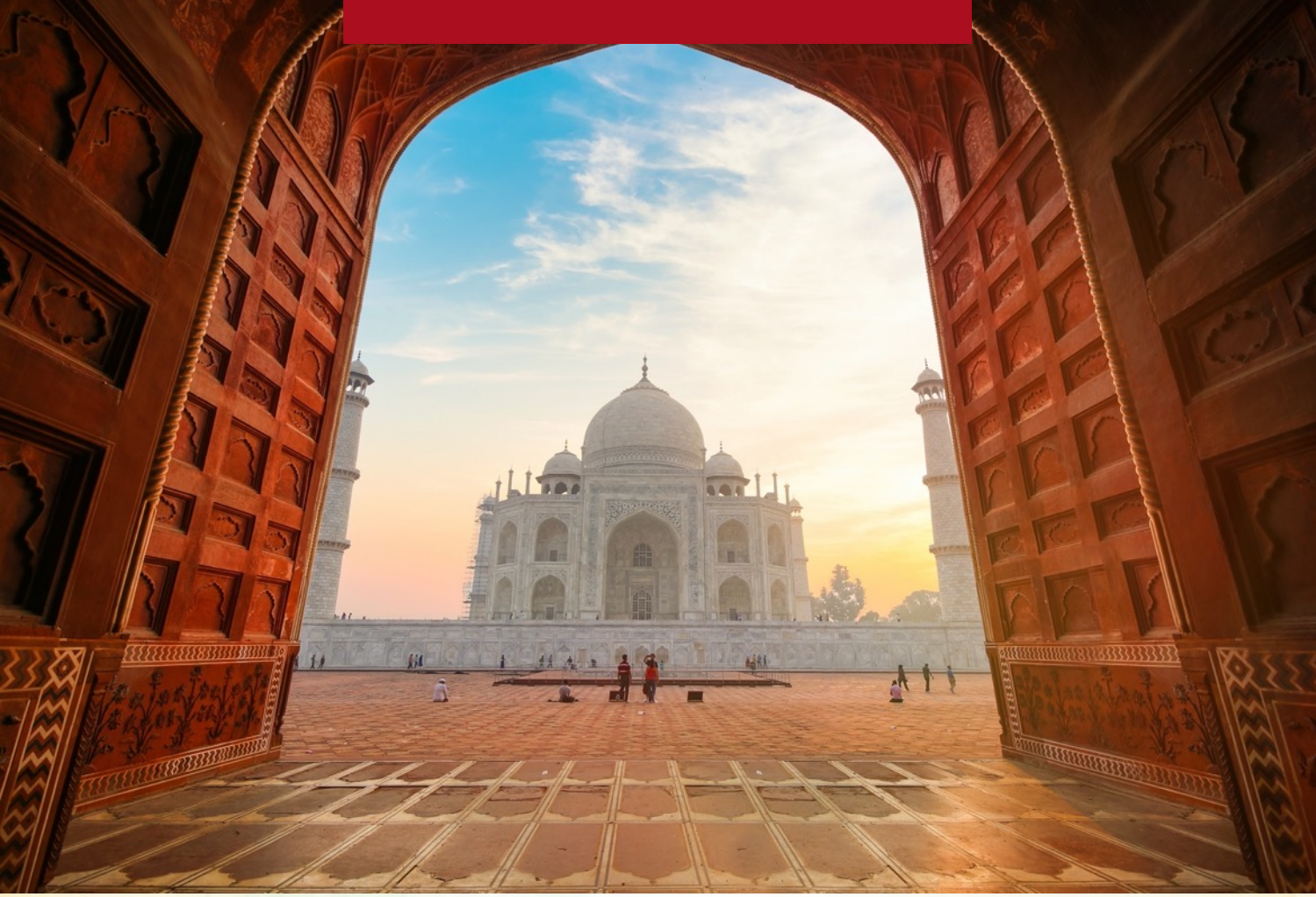
Provision for Establishment and Operation of Rural Tourism Units:

- Under the Scheme, agro tourist units will be permissible on minimum 2000 square meters and maximum 2 hectares agriculture land, camping units and caravan parks will be permissible on minimum 1000 square meters and maximum of 1-hectare agricultural land will be allowed. However, minimum and maximum plot area has not been fixed for rural guest house in populated/residential areas.
- Rural tourism units will be allowed on 15 feet wide road.
- Rural tourism units will not require land conversion and building plan approval.
- Registration and project approval from respective Tourist Reception Center must be done for establishing and operation of this rural tourism units.
- FSSAI license will be essential for the operation of the rural tourism units.

The scheme has been made keeping in mind the beneficiaries who will avail grant and facilities as well as the special facilities provided to tourists so that they take away a pleasant experience from the state. Department of Tourism, GoR will be the nodal agency for implementing the scheme. For any more information, the applicant can visit the website of the department or the concerned tourist reception center.

Various State Government Initiatives to Promote Inbound Tourism





Promotion of Tourism is primarily the responsibility of the concerned State Government/ UT Administration. There are several initiatives taken by various state governments in India to promote inbound tourism. Some of them are:

- The government of Kerala has launched the 'Tourist Police' initiative to ensure the safety and security of tourists. They have also introduced the 'Responsible Tourism' campaign to promote sustainable tourism practices.
- The Rajasthan government has launched the 'Palace on Wheels' luxury train service, which takes tourists on a week-long tour of Rajasthan's major tourist destinations. They have also launched the 'Rajasthan Heritage Week' to promote the state's rich cultural heritage.
- The Goa government has launched the 'Goa Miles' taxi service to provide safe and reliable transport to tourists. They have also launched the 'Bird Festival' to promote birdwatching tourism in the state.
- The Tamil Nadu government has launched the 'Namakkal Kavingar Maaligai' tourist complex, which provides facilities for tourists to explore the state's cultural heritage. They have also launched the 'Tamil Nadu Tourism Awards' to recognize excellence in the tourism industry.
- The Himachal Pradesh government has launched the 'Heli-Taxi' service to provide tourists with an aerial view of the state's scenic beauty. They have also launched the 'Tourism Infrastructure Development Fund' to encourage the private sector to invest in tourism infrastructure.
- The Uttar Pradesh government has launched the 'Kumbh Mela' festival, which attracts millions of tourists from around the world. They have also launched the 'Heritage Arc' project to promote tourism in the state's heritage cities.

The following section explains about the tourism scenario of few of the states in detail.

Punjab

Located on the north-western edge of India, Punjab is one of the smaller albeit prosperous states of the nation, and home to a lively, hospitable, and dynamic people. Historically, Punjab has played host to several ethnicities, including the Aryans, Persians, Greeks, Afghans and Mongols, thus bestowed with a rich tangible heritage. Reflecting this history are the countless sites that dot the state: impressive forts & palaces, ancient monuments, architectural marvels and many a battlefield.

Tourism Outlook

The state has now emerged as one of the fastest growing states in tourism. Based on India Tourism Statistics Report 2022, it has ranked 7th in the domestic tourist visits category while it stands at top position in foreign tourist visits. It shares 3.93% of India's total domestic tourist visits and 29.22% of India's total foreign tourist visits in 2021.

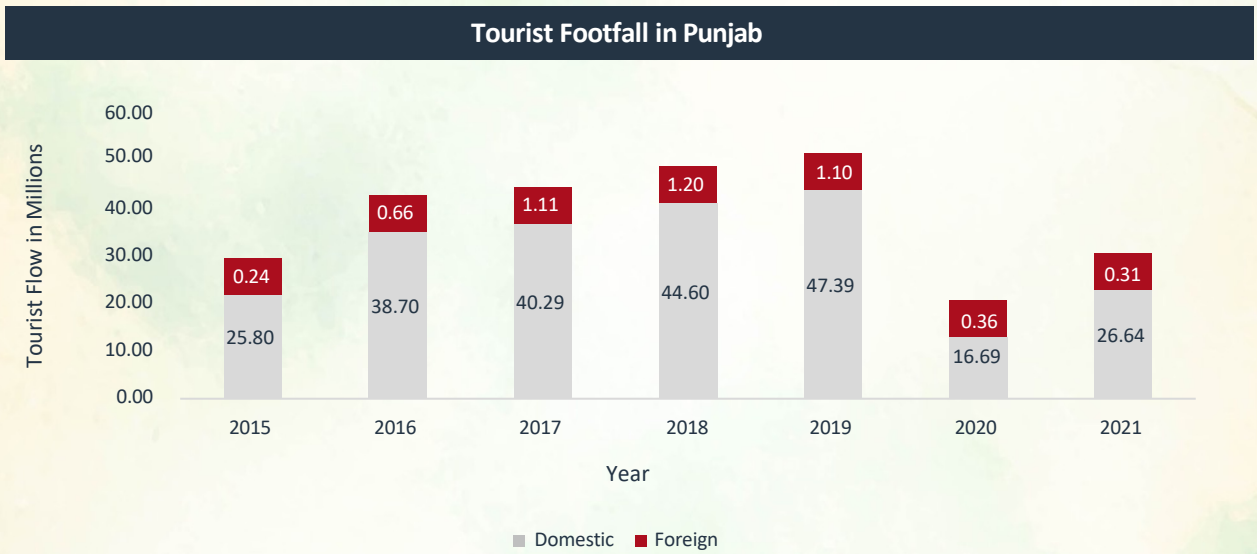


Figure 33: Tourist Footfall in Punjab
Source: https://punjabtourism.punjab.gov.in/statistics-surveys.php

Major Tourism Themes Attracting Tourists

Themes	Key Tourist Destinations
Religious Shrines	Sri Harmandir Sahib (Golden Temple), Sri Anandpur Sahib, Moorish Mosque – Kapurthala, Ram Tirath, Sri Durgiana Temple, Takht Sri Damdama Sahib Bathinda, Rauza Sharif – Fatehgarh Sahib
Freedom Trails	Jallianwala Bagh – Amritsar, Jang-e- Azadi Memorial – Kartarpur, Partition Museum – Amritsar, Khatkar Kalan – SBS Nagar, The National Martyrs Memorial – Firozepur, Kuka Memorial – Sangrur, Chhota Ghallughara – Gurdaspur, Wadda Ghallughara – Sangrur, Baba Banda Singh Bahadur Memorial – Chhappar Chirri, War Memorial - Amritsar

Heritage Sites	Sanghol – Sri Fatehgarh Sahib, Archeological Site – Rupnagar, Bahadurgarh Fort – Patiala, Anandgarh Fort – Sri Anandpur Sahib, Phillaur Fort – Jalandhar, Gobindgarh Fort – Amritsar, Sheesh Mahal – Patiala, Qila Mubarak – Patiala, Jagjit Palace – Kapurthala, Bathinda Fort,
Ecological Hotspots	Harike Wetland, Ropar Wetland, Kanjili wetland, Nangal Wetland, Keshopur wetland,
Cultural Landmarks	Kila Raipur Games, Harivallabh Sangeet Sammelan, Hola Mohalla, Sufi Darbar, Baba Sheikh Farid Aagman
Border Tourism	Wagah Border – Amritsar, Hussainwala Border – Ferozepur District

Key Initiatives[11]

01	Amritsar: Establishment of hotel city and tourism facilities - Heritage Street, Entrance Plaza and Interpretation Centre at Golden Temple, Partition Museum, Sadda Pind, War Memorial, Ram Tirath Complex & Fort Gobindgarh, Amritsar
02	Developing Patiala as Heritage City-Qila Mubarak, Sheesh Mahal, Medal Gallery, Bahadurgarh Fort, Bir Moti Bagh Wildlife Sanctury, Old Moti Bagh Palace, Gurdwara Dukh Niwaran, Qila Mubarak, Nabha, Bir Bhadson, Wildlife Sanctury, Hira Mahal, Darbar hall (Museum), Mughal Sara
03	The State plans to develop Patiala and the areas around Sirhind-Patiala-Nabha-Sangrur as heritage zone/arch

Key Incentives/Policy Support/Schemes[12]

Fiscal Incentives
MSME – 100% Reimbursement of net SGST, Exemption in ED, SD
MSME – 5% Interest Subsidy for Border and Kandi Area
MSME – Assistance for Finance, Technology, Marketing & Exports
Large – 75% of net SGST, 100% Exemption in ED, SD & 50% Property Tax
Thrust Sector – 100% of net SGST, 100% Exemption in ED, SD & 50% PTax
Early Bird Units in New Industrial Parks – 100% of net SGST up to 125% FCI
100% exemption from entertainment tax to all new investments in special theme parks/ amusement parks/ water parks/ adventure parks/ cinematic tourism like film institute/ film city/ film studio/ theatres/ mini theatres etc

[11] pbindustries.gov.in
[12] pbindustries.gov.in



100% Reimbursement of net SGST for 15 years up to 200% of FCI
100% Exemption from CLU/EDC
Employment Generation Incentive @Rs.30,000/employee/year
CLU in Agriculture Zone for minimum land area of 50 Acres
Non-Fiscal Incentives
Exemption from PAPRA and Grant of CLU for Anchor Projects
365 days operation without any weekly offs
Exemption from Consent Management for Green Category Units
Heritage hotels situated on narrow roads in urban areas which arrange for a dedicated alternative parking on a 40/60 feet wide road and provide for the park and ride system from hotel to parking place, shall be permitted to operate
Hotel constructions which are of 20 years or above shall be exempted from parking places. The State will provide dedicated alternative parking and park and ride system from hotel to parking place and a congestion charge can be levied on all such hotels.

Maharashtra

The state known for its sheer size and diversity is located on the western part of the country. It has a varied landscape bounded by the Western Ghats that stretch out into the mists as far as the eye can see. The in numerous forts, that adorn the State, stands proud and strong, depicting its historic past. Additionally scores of temples sculpted into and out of basalt rock, throng the atmosphere. Its diverse and colorful cultures are all woven into one gigantic quilt that represents the true nature of the State. The colorful festivals of the State galvanise the sleepy thousands into fervent motion. And her miles of silver, white beaches, stretched taut and inviting over the entire coast.

Tourism Outlook

With the gradual easing of COVID-19 restrictions and the increasing number of people getting vaccinated, the tourism industry in Maharashtra is recovering steadily. Based on India Tourism Statistics Report 2022, it has ranked 5th in the domestic tourist visits category while it stands at 2nd position in foreign tourist visits category. It shares 6.43% of India's total domestic tourist visits and 17.60% of India's total foreign tourist visits in 2021.

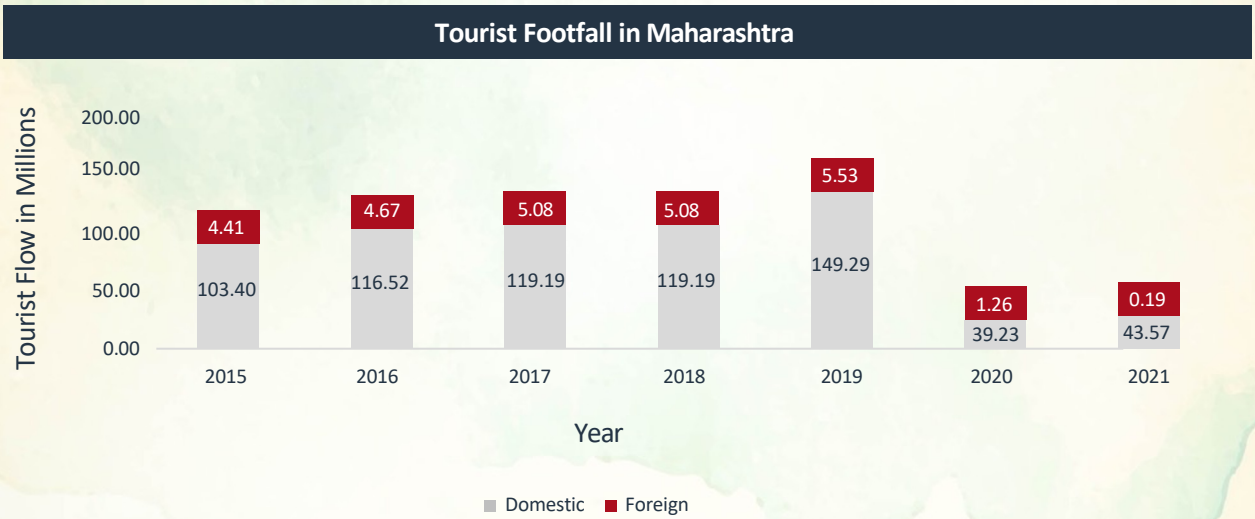


Figure 34: Tourist Footfall in Maharashtra
Source: India Tourism Statistics

Major Tourism Themes Attracting Tourists

Themes	Key Tourist Destinations
Bollywood Tourism	Film City, Juhu, Colaba
MICE Tourism	Mumbai – MMRDA ground, NESCO exhibition ground, Pune- Pune Trade Center, Pune International Exhibition and Convention Center, Auto cluster exhibition Center, Nashik – SulaFest, Thakkar Ground Dome, Nagpur – Reshimbagh ground, Growmiles Consumer Exhibitions, aurangabad

Culinary Tourism	Mumbai, Pune, Konkan, Nashik
Agro Tourism	Baramati, Satara, Pune, Nashik, Nagpur, Kolhapur (Baramati Agri Tourism Center, Drum stick agri-tourism Center)
Eco Tourism	Tadoba Wildlife Sanctuary, Pench Tiger Reserve, Melghat Tiger Reserve, Umred-Karhandla Sanctuary, Navegaon Tiger Reserve, Bor Wildlife Sanctuary, Bhimashankar Wildlife Sanctuary, Igatpuri, Tapola, Kolad
Social Tourism	Ralegan Siddhi, Hiware Bazar, Anandvan
Wellness Tourism	Atmantan Welness resort – Mulshi, Viveda – Trimbakeshwar, Govardhan Eco Village – Hamrapur, Lonavala, Matheran, Bhimashankar, Malshej Ghat, Igatpuri, Akkalkot, Dhamma Pattana, Osho Meditation,
Sustainable Tourism	Saguna Baug, Turtle Festival – Velas, Murud janjira Festival, mango Festival, Katha Shilp Mahotsav
Heritage Tourism	Forts – Raigad, Shivneri, Pratapgarh, Sindhudurg, Cave – Ajanta, Aurangabad caves, Bedse Caves, Karle caves, Ellora caves, Kuda caves, Pandavleni caves, Pitalkhora caves, Mumbai, Pune, Shirdi, Ashtavinayak

Key Initiatives

01	Development of Sindhudurg Coastal Circuit - Sagareshwar, Tarkarli, Vijaydurg (Beach & Creek), Mitbhav under Swadesh Darshan scheme
02	Development of Spiritual Circuit Waki- Adasa-Dhapewada-Paradsingha-Telankhandi- Girad under Swadesh Darshan scheme
03	Development of Trimbakeshwar under PRASHAD Scheme
04	Central Financial Assistance to Mumbai Port Trust for Development Mumbai Port trust 15.0015.00 of KanojiAngre Lighthouse as a tourist Destination
05	Up-gradation/ modernization to International Cruise terminal at Indira Dock, Mumbai.
06	Upgradation/ Modernization to International Cruise Terminal at Indira Dock, Mumbai Port Trust
07	The Beach Shack Policy - Special permits for the temporary construction of shacks, portable cabins, deck-beds, umbrellas etc will be issued The construction has to be compliant with environmental regulations. The policy will be implemented in Ratnagiri (Guhagar, Arevare), Sindhudurga (Kunkeshwar, Tarkali), Raigad (Varsoli, Diveagar), Palghar (Kelava and Bordi) and only ten beach shacks will be permitted to be built on each beach. 80 percent of the jobs created in the beach shacks will be reserved for locals and the license period is three years.

08	Agro Tourism policy: Agro tourism centers will receive registration certificates from the tourism department and the owners of such centers will also get loans on the basis of these certificates. According to the new policy the state aims to generate an annual 10% income from the tourism sector and contribute 15% income share of the tourism sector in the state's gross income and the government is striving to tap into the potential of agro-tourism for meeting this target.
09	Caravan Tourism: Caravan operators will be given incentives such as exemption in stamp duty and electricity duty, refund in GST. The 'Caravan Tourism' policy has provisions for the tourism department to formulate strategies and boost caravan-related activities in the public and private sectors and on PPP basis. Caravan operators will be given incentives such as exemption in stamp duty and electricity duty, refund in GST
10	Single window clearance policy: Department of tourism has introduced a common online application portal that will streamline the process of seeking licenses, permissions for setting up a hospitality unit in the state

Key Incentives/Policy Support/Schemes

Incentives for Sustainable tourism units
For all units which have successfully classified under the sustainable tourism practices, there will be extension in the eligible time period of incentives. The extent of time period will be approved by the HPC
100% re-imbursement on achieving the certifications and standards from the Eco-tourism society of India up to an amount of INR 1 lakh.
Incentives for MICE units
For all units which are successfully classified under the MICE tourism practices, there will be extension in the eligible time period of incentives. The extent of time period will be approved by the HPC
Incentives for women entrepreneurs
New Tourism Units owned and managed by women entrepreneurs (with minimum equity participation of 51% in the entity) and the differently abled will be entitled to an additional time period of incentives. The extent of time period will be approved by the HPC.
Incentives for skill development programs
Industry bodies / chambers of commerce / recognized tourism and hospitality institutions etc. are encouraged to utilize their CSR funds for the development of tourism human resources for the state
Special tourism development courses and modules will be imparted in association with the hoteliers, tour operators, etc. Reimbursement of 100% of Course Fees, up to a maximum of INR 12,500 /- per person for course duration of a fortnight or more.
Monthly stipend of INR 7,500 /- to be given to tourist guides from the local areas who are registered under MTDC. This will be given for a period of three months.

Delhi

Delhi is the capital city of India and is a popular tourist destination for both domestic and international travelers. The city offers a mix of modern and traditional experiences, with a rich history, vibrant culture, and diverse cuisine. Delhi has an attractive real estate market and is a preferred tourist destination. Owing to its location, connectivity and rich cultural history, Delhi has always been a prime tourist attraction of the country. Delhi Metro is the seventh busiest metro rail network in the world.

Tourism Outlook

The percentage share of Foreign Tourist Arrivals in India during March 2022 at Delhi Airport stood at 41.58%, which was the highest among the top 15 ports in India. Based on India Tourism Statistics Report 2022, Delhi has ranked 14th in the domestic tourist visits category while it stands at 3rd position in foreign tourist visit. It shares 1.57% of India's total domestic tourists and 9.50% of India's total foreign tourists in 2021.

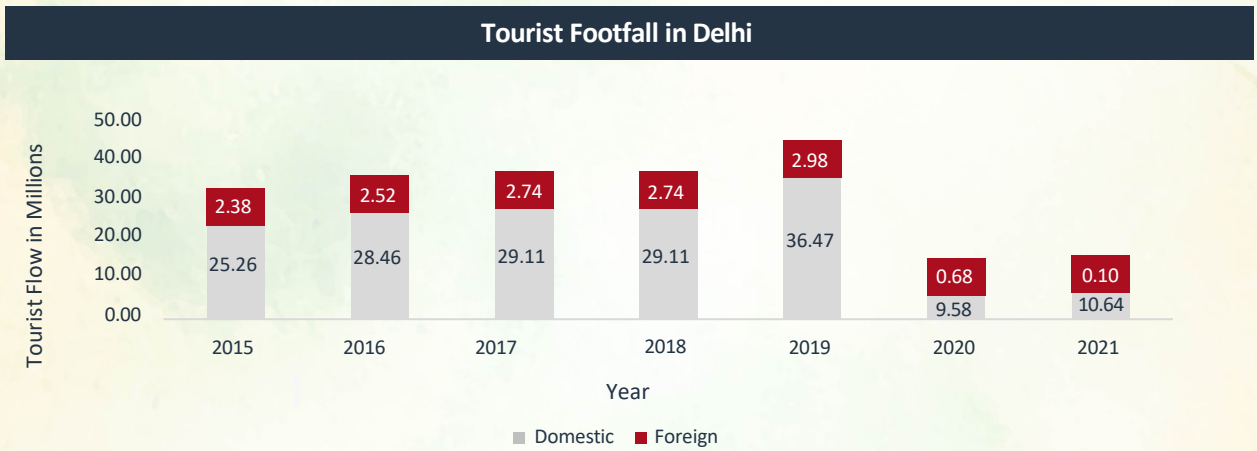


Figure 35: Tourist Footfall in Delhi
Source: Source: India Tourism Statistics

Major Tourism Themes Attracting Tourists

Themes	Key Tourist Destinations
Pilgrimage	Ahimsa Sthal, Akshardam Mandir, Chhatarpur Temple, Gurudwara Bangla Shahib, Gurudwara Rakab Ganj, Gurudwara Sis Ganj, Hazrat Nizam-ud-din Shrine, ISKCON Temple, Jama Masjid, Laxmi Narain Temple (Birla Mandir), Yog Maya Mandir
Museum	Air Force Museum, Craft Museum, Indira Gandhi Smriti, Shankar's International Dolls Museum, National Gallery of Modern Art, National Museum, National Museum of Natural History, National Rail Museum, National Science Centre Museum, Nehru Museum, Nehru Planetarium, Sanskriti Museum
Zoo	Delhi Zoo
Handicraft Market/Market	Dilli Haat – INA, Dilli Haat – Pitampura, Palika Bazaar, Pragati Maidan

Monument	Tadoba Jantar Mantar, Kotla Feroz Shah, Lodhi Tomb, Purana Qila & Old Fort Museum, Qutab Minar, Rahim-Khane-Khanam Tomb, Red Fort, Safdarjung Tomb, Sultan Ghari's Tomb, The Bahai Temple (Lotus Temple), Tughluqabad Fort & Ghiyassuddin Tuglag Tomb, Humayuns Tomb
Garden	The Garden of Five Senses, Mughal Garden, Lodhi Garden, Rose Garden
Memorial	War Memorial, Raj Ghat, Indira Gandhi Smriti, Buddha Memorial

Key Initiatives

01

Tourism Infrastructure

- Renovation & up-gradation of Azad Hind Gram
- Construction of Boundary wall for the protection of 2 Parking Lots at the Unit of Nature Bazaar, Andheria Morh
- Construction of Boundary wall at Kala Gram, near Garden of Five Senses, Said-ul-Ajaib, Saket, New Delhi
- Up-gradation and renovation of Civil and Electrical Infrastructure in Dilli Haat Janak Puri
- Renovation and upgradation of Coffee home at Cannaught Place
- Up-gradation of food courts etc at Dilli Haat, INA

02 Development of River Front Yamuna as a World Class Tourist Destination for International and Domestic Tourists particularly developing area around the Signature Bridge

03 Promotion of Tourism Delhi as a Destination in National and International Fairs/ Conferences/ Marts/ Exhibitions, organisation of Fairs and Festivals

04 Bed & Breakfast Scheme to provide budget accommodation to tourists coming to Delhi and enjoy the traditional Indian Home & Culture and also have the confidence of the families support and protection and go back with pleasant memories

05 Beautification of Entry Points of Delhi

06 Bed & Breakfast Scheme to provide budget accommodation to tourists coming to Delhi and enjoy the traditional Indian Home & Culture and also have the confidence of the families support and protection and go back with pleasant memories

07 Construction of State Guest House (Delhi) i.e. Delhi Sadan at Sector-19, Dwarka, New Delhi on land measuring 3899.42 Sqm under new scheme Delhi Sadan

08	Development of Bharat Darshan Park at Punjabi Bagh under Waste to art concept under new scheme Development of Bharat Darshan Park
09	Running of Tourist Information Centers at all the main embarkation points in Delhi besides information offices in Kolkata and Chennai
10	Development of 7 Heritage Routes with special focus on Mehrauli Node along with construction of elevated walkways connecting Qutub Metro Station to Qutub Minar
11	Inauguration of a three-day Delhi Tourism Food Festival 2023' at Major Dhyan Chand National Stadium

Key Incentives/Policy Support/Schemes

Grant-in-Aid to Delhi Institute of Hotel Management & Catering Technology (DIHM & CT)
Grant-in-Aid to Delhi Tourism and Transportation Development Corporation (DTTDC) for Swadesh Darshan (CSS): Project is of development of 7 Heritage Routes with special focus on Mehrauli Node along with construction of elevated walkways connecting Qutub Metro Station to Qutub Minar
Providing free Wi-Fi hotspots in popular tourist areas
Exemption of entertainment tax on cultural shows and performances to encourage cultural tourism
Delhi Film Policy: Delhi Tourism will release the subsidy amount to the film producer within 90 days, after the film release
Delhi Film Policy 2022 subsidies to Indian films including all regional films and foreign films, will be based on the points scored in the scoring system
The state government, under Budget 2022-23, has allocated Rs. 8,616 crore (US$ 1.24 billion) towards transport
An amount of Rs. 100 crore (USD 14.56 million) has also been allocated for a new scheme, CM Mohalla Suraksha Yojana, to ensure safety and security of citizens
All tourism projects with capital outlay of over Rs. 50 lakhs are made eligible for a 20 per cent investment subsidy, not exceeding Rs 30 lakhs
Custom Duty on specified items has been reduced to the level of 25 % for project import provided the goods imported are required for initial setting up of the hotel or for substantial expansion of the hotel
Recreational bodies can import goods considered to be essential for their own use upto 10% of foreign exchange earned during the preceding licencing year

Karnataka

Karnataka is a state located in the southwest region of India and is known for its rich cultural heritage, stunning landscapes, and diverse wildlife. Apart from that, it is also famous for its magical hill stations, spectacular waterfalls, pilgrimage centres and a 320km long coastline dotted with un-spoilt beaches. There are 319 major tourist destinations in the state of Karnataka, the highest in India. Tourism is an important industry in Karnataka and the state attracts both domestic and international tourists throughout the year.

Tourism Outlook

Based on India Tourism Statistics Report 2022, Karnataka has ranked 4th in the domestic as well as foreign tourist visits category. It shares 12% of India's total domestic tourist visits and 6.87% of India's total foreign tourist visits in 2021.

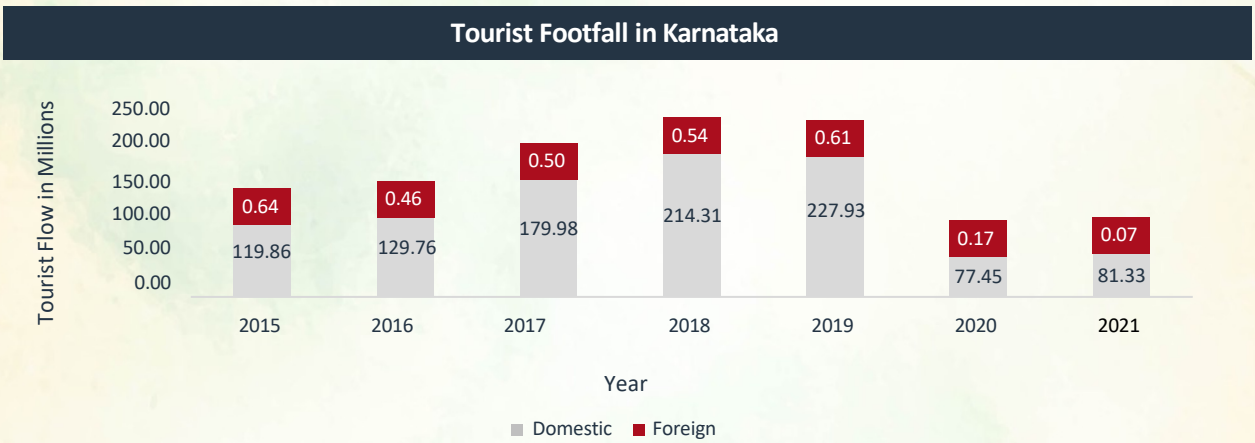


Figure 36: Tourist Footfall in Karnataka
Source: Source: India Tourism Statistics

Major Tourism Themes Attracting Tourists

Themes	Key Tourist Destinations
Eco Tourism	Bannerghata National Park, Bhimeshwari Fishing Camp, Bandipur Wildlife Sanctuary, Kabini Jungle Lodge, Ranganathittu Bird Sanctuary, Badra Wildlife Sanctuary, Mandagadde Bird Sanctuary, Dandeli Jungle Lodges, Nagar hole National Park, Bison River Resort, Kudremukh, Kemmannugundi, Devbagh Beach Resort, Koodachadri, Jog Falls and Karwar.
Religious Tourism	Srirangapatna, Mysore, Chamraj Nagar, Tala Cauvery, Sringeri, Udipi, Dharmasthala, Mangalore, Kukke Subramanya, Kollur, Murudeshwar, Gokarna, Sahasralinga Sirsi, Saravanabelogola, Chickmagalur, Belur/Halebid, Bhadravathi, Harihar, Shravanabelagola, Yellamma Temple, Jumma Masjid, Infant Jesus Church, Sringeri

Heritage & Cultural Tourism	Hampi, Pattadakal and the Western Ghats of Karnataka
Coastal & Cruise Tourism	Dharmasthala, Chickmagalur, Udupi, Kollur, Agumbe, Sringeri, Kudremukh, St. Mary's Island, Jog Falls, Banavasi and Dandeli Resort

Key Initiatives

01	Under the ambit of Sagarmala, Ministry has provided in-principle approval to 4 additional projects, taking the total to 11 floating jetty projects in Karnataka. This will enhance tourism, create employment, and generate wealth in a ripple effect across industries throughout the entire geographical region
02	Under swadesh darshan 2.0, the ministry has identified 'hampi' and 'mysuru' as Destinations for development
03	Under PRASHAD scheme, the Ministry has identified the following projects in Karnataka:- (i) Development of Maa Chamundeshwari Devi Temple, Mysuru, Karnataka (ii) Sri Madhwa Vana, Kunjarugiri, Udupi District (iii) Papnash Temple, Bidar District (iv) Sri Renuka Yallamma Temple, Saudatti, Belagavi District.
04	Karnataka Tourism Policy 2020-26, is providing incentives and subsidies that encourage investors and facilitate investments in the tourism.
05	Annual event 'Connect' to help the hospitality, leisure and tourism industry in Karnataka to come under one initiative and add immense value to the stakeholder's efforts to market their product and create a networking opportunity with various other marketing organizations and professionals
06	Karnataka Tourism Policy 2020-25 that envisages greater participation of local communities in tourism activities. The core theme is agri and rural tourism with the objective of promoting not just agricultural activities, but also all aspects of rural life, including local cuisine, culture, tradition, and arts.



07	Karnataka Film Tourism Policy 2018: Financial incentives up to INR 2.5 Cr. to filmmakers showcasing tourist destinations of Karnataka Fiscal incentives: Category 1- 3 movies up to INR 2.5 Cr. Category 2- 5 movies up to INR 1 Cr.
08	Karnataka Film Tourism Policy 2018: Financial incentives up to INR 2.5 Cr. to filmmakers showcasing tourist destinations of Karnataka Fiscal incentives: Category 1- 3 movies up to INR 2.5 Cr. Category 2- 5 movies up to INR 1 Cr.

Key Incentives/Policy Support/Schemes

For participation in international roadshows, the participants will get 75% of the air fare, with a maximum ceiling of INR 1 lakh as MDA from the Tourism department.

The Tourism policy 2020 -2026 also guarantees 15% capital subsidy to all tourism related projects with maximum project cost of Rs 5 crore

Additional floating jetty projects in Karnataka been granted 100% funding of Rs. 26 Crore by the Ministry under the Sagarmala Program.

Kerala

Kerala, located on the south-western tip of India, enjoys unique geographical features that have made it one of the most sought-after tourist destinations in Asia. Fondly referred to as 'God's Own Country', Kerala was selected by the National Geographic Traveller as one of the 50 destinations of a lifetime and one of the thirteen paradises in the world.[13]

Tourism Outlook

Based on India Tourism Statistics Report 2022, Kerala has ranked 15th in the domestic tourist visit category while it stands at 5th position in foreign tourist visit states. It shares 1.11% of India's total domestic tourist visit and 5.74% of India's total foreign tourist visits in 2021.

Tourist Footfall in Kerala

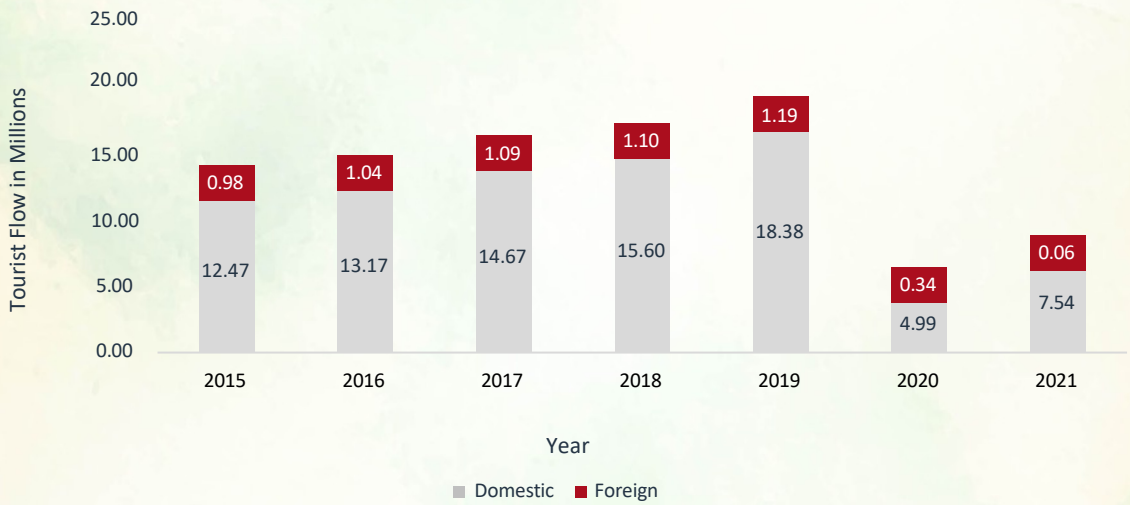


Figure 37: Tourist Footfall in Kerala
Source: Source: India Tourism Statistics

Major Tourism Themes Attracting Tourists

Themes	Key Tourist Destinations
Coastal & Cruise Tourism	Alapuzzha, Kovalam Beach, Varkala Beach, Cherai Beach, Beypore Beach, Kappad Beach, Kozhikode Beach, Bekal Fort Beach, Ashtamudi Lake, Alumkadavu, Sasthamkotta Lakes, Kumarakom Backwaters, Vembanad Village, Kumbalangi Village, Kavvayi Backwaters, Chithari Island, Kanhangad Backwaters, Valliyaparamba Backwaters
Heritage & Cultural Tourism	Thrissur Pooram in Vadakunathan Temple, Bekal Fort in d Kasaragode,

[13] http://www.keralatourism.gov.in/

Medical & Wellness Tourism	Kovalam, Kollam, Thrissur and Alapuzzha, Kerala Ayurveda named as Panchakarma,
Nature based and Ecotourism	Hill Stations of Munnar, Vagamon, Thekkady, Kalvary Mount, Peermade (all in Idukki district), Ponmudi in Thiruvananthapuram, Paithamala in Kannur, Wayanad in Wayanad Idukki Wildlife Sanctuary, Periyar Tiger Reserves and Eravikulam National Park in Idukki, Neyyar Wildlife Sanctuary in Thiruvananthapuram, Kumarakom Bird Sanctuary in Kottayam, Chimmini Wildlife Sanctuary and Peechi-Vazhani Wildlife Sanctuary in Thrissur District, Parambikulam Tiger Reserve in Palakkad, Kadalundi Bird Sanctuary in Kozhikode, Muthanga Wildlife Sanctuary in Wayanad and Aralam Wildlife Sanctuary in Kannur
Religious Tourism	Sree Padmanabhaswamy Temple, Sabarimala, Guruvayoor, Mattancherry Synagogue, Kaladi (Birth place of Sri Sankarachary), Thiruvambady Temple, Vadakunathan Temple and the Holy Cross Church in Trichur
Sports Tourism	Champakulam Boat Race, Nehru Trophy Boat Race and Aranmula Boat Race

Key Initiatives

01 Kerala revises Responsible Tourism Policy to make it a People's Movement with "The focus is on making Kerala a better place with better people."

02 Kerala inks pact with UN body to empower Women in Tourism which will boost women-friendly activities in the state's tourism sector by training stakeholders who include young representatives and civil organisations.

03 Kerala Tourism host international online painting competition for children. This helps shed light on the tourism department's efforts in the rural sector.

04 Kerala Tourism organized a series of roadshows in the well-known cities of New York, Los Angeles and San Francisco to significantly boost its efforts to entice tourists from the USA.

05 State's Caravan Tourism offers a safe, customized, and closest-to-nature travel experience to tourists. The caravan tourism policy, implemented with the cooperation of various other departments, has helped in the post-pandemic revival of Kerala's tourism sector by attracting more foreign tourists to the State.

06 The Rs 93-crore Kovalam tourism development project, approved by the State Cabinet, will facilitate a grand make-over of the iconic global tourist destination

07 The State Budget 2023 has allocated Rs 362.15 crore to the tourism sector in Kerala, under this eight Tourist Destinations to be developed to World-Class Standards

08	The famed 'Car and Country' OTT show, which is popular in Europe, is coming to Kerala and will be hosted in collaboration with Kerala Tourism.
09	Kerala Tourism has announced invited reels or shorts related to Kerala from people across the world showcasing subjects such as Kerala's history, art forms, cuisine, festivals and celebrations
10	The virtual summit of Kerala Travel Mart (KTM), to attract both domestic and foreign tourists in record numbers by positioning the state as an all-season experiential destination of diverse attractions

Key Incentives/Policy Support/Schemes

Tourism Working Capital Support Scheme

Tourism entrepreneurs/establishments can apply for working capital loan upto Rs. 25 lakhs at a rate of interest as per the approved policy of respective banks.

Small loans ranging from Rs. 1 lakh to 3 lakhs for Small Hotels, Resorts, Home stays, Serviced Villas, Grihasthali units, Tour Operator, Travel Agents, Tourist Motorboat Operators etc.

Loans ranging from Rs. 5 lakhs to 25 lakhs for Hotels, Resorts, Ayurveda Centres, Tour operators, Travel agents, Houseboats, Classified Restaurants etc.

Subsidy Scheme

For tourism projects hotels with star classification, motels recognised by the State Government, restaurants recognised by the Central Government, tour operators recognised by the Central Government, amusement parks recognised by the State Government, institutions giving training in the traditional art forms of Kerala, handicrafts units recognised by the Central Government, Ayurveda centres approved by the department of Tourism and houseboats.

Investment Policy

Various attractive financial incentives will be given to the approved Ayurveda centres.

The financial incentives for approved projects include investment subsidy upto 10 per cent subject to a ceiling of one million rupees. Such projects will also get support to avail funds from state financial corporations, concession in electricity charges and guidance and publicity support from the State Government.

Eco-certification scheme

Certificate holders will be offered several incentives by the Department and will be included in the brochures, leaflets, and other promotional materials of Kerala Tourism.

Tamil Nadu

Tamil Nadu is having a beautiful landscape, sacred temples, and imposing wildlife. There is an essence of spirituality through plethora of scenic temples, a touch of serenity through its soothing beaches and hill stations, an aura of wilderness and vitality through its amazing Wildlife Sanctuaries and National Parks, a sense of joy through its various festivals and art forms, a spirit of authenticity through its delectable cuisines and liveliness in its colorful markets.[14]

Tourism Outlook

Six out of top ten popular Indian monuments visited by foreign tourists in FY22 were from Tamil Nadu, according to a report 'India Tourism Statistics 2022'. The group of monuments in the coastal town of Mamallapuram had the highest number of foreign visitors in FY22. The UNESCO World Heritage site, located close to Chennai, had 1.45 lakh foreign visitors in the previous fiscal year, accounting for 46% of the total foreign visitors to the top ten most popular centrally protected ticketed monuments. Based on India Tourism Statistics Report 2022, Tamil Nadu has topped in the domestic tourist visit category while it stands at 6th position in foreign tourist visits. It shares 17.02% of India's total domestic tourist visit and 5.46% of India's total foreign tourist visits in 2021.

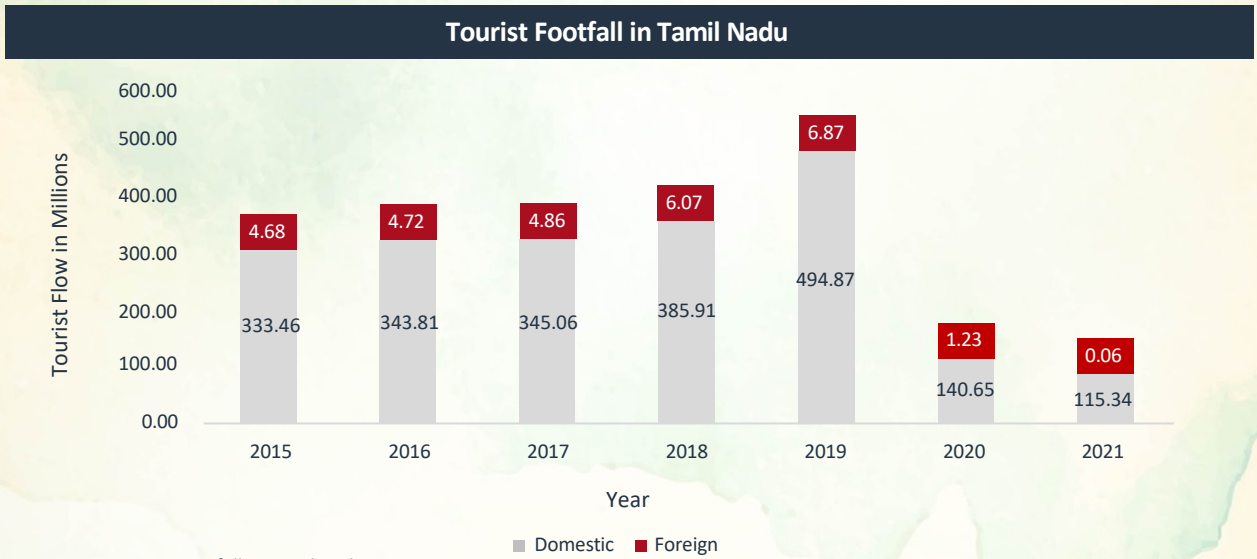


Figure 38: Tourist Footfall in Tamil Nadu
Source: Source: India Tourism Statistics

Major Tourism Themes Attracting Tourists

Themes	Key Tourist Destinations
Religious Tourism	Madurai Meenakshi temple, Nataraja Temple in Chidambaram, Kancheepuram Kamakshi temple, Kumbakonam temple clusters, Kanniyakumari Shore temple, Palani hill temple, Rameshwaram Sea Shore temple and Velankani Shrine

[14] https://www.tourmyindia.com/states/tamilnadu/

Heritage & Cultural Tourism	5 UNESCO recognized World Heritage Sites Great Living Chola Temples, Group of Monuments at Mahabalipuram and Nilgiri Mountain Railway at Ooty. Chola temple, Shore temples in Mamallapuram, Fort St. George and Santhome Church in Chennai, Gingee Fort, Vellore Fort, Thanjavur Palace and Trichy Rock Fort and Heritage Towns like Chidambaram, Kanchipuram, Mahabalipuram, Madurai, Thanjavur
Nature based / Ecotourism	Ooty, Kodaikannal, Yercaud, Rameshwaram and Coonoor Udhagamandalam, Annamalai Hills, Kodaikanal, Yelagiri Hills and Koli Hills
Coastal & Cruise Tourism	Chennai, Cuddlore and Nagapattinam Marina Beach, Besant Nagar Beach, Mamallapuram, Dhanushkodi, Rameswaram and Kanniyakumar Muthukadu, Mudaliarkuppam, Pitchavaram, Ooty, Kodaikanal and Yercaud
Medical Tourism	Apollo Hospital, Fortis Malar Hospital, Sankara Nethralaya (all in Chennai), Aravind Eye Clinic (in Coimbatore) & Vaidyagrama Ayurvedic Healing Village

Key Initiatives

01

Tourism Development Destination Scheme

- Development of Kolli Hills with various tourist facilities
- Development of Jawwadhu Hills with various tourist facilities
- Development of Mudaliarkuppam with various beachfront facilities
- Illumination of Ayyan Thiruvalluvar Statue in Kanniyakumari with laser 3D Mapping technology
- Development of Adventure and Eco Camping Sites at Hill Stations, Forests, Coastal Areas and Dam sites
- Development of Yelagiri with various tourist facilities
- Periodical Maintenance of Ayyan Thiruvalluvar Statue

02

Infrastructure Facilities Scheme

- Development of Basic facilities at Gunderipallam Dam site, Gobichettipalayam, Erode District
- Tourism Development works at Kalugumalai, Thoothukudi District
- Renovation work at Courtallam Kalaivanar Arangam and Basic Facilities at Main Falls, Tenkasi District.
- Kumaragiri Arulmigu Dhandayuthapani Temple Rest House and Toilet Facilities Salem District.
- Sound and Light Show at Mamallapuram.
- Basic Facilities at Arulmigu Thittamalai Kuzhanthai Kumarasamy Kovil Erode District

03

Development of Roads

- Development of Approach Road facilities at Gunderipallam Dam site, Gobichettipalayam, Erode District
- Tourism Development works at Kalugumalai, Thoothukudi District
- Formation of Ghat Road and Basic Facility work at Nainamalai, Namakkal District.
- Kumaragiri Arulmigu Dhandayuthapani Temple formation of Ghat Road at Hill temple

04

Others

- New Mobile App and Website for Tourism Department
- Development of Mamallapuram as an Iconic Site
- Development of Rameswaram under 'PRASHAD' Scheme
- Upgradation of Tamil Nadu Tourism Development Corporation (TTDC) Hotels
- Skill Upgradation and Certification Programmes for Boat House Staff
- Holiday Home-Deposit Accommodation Scheme
- Represented India at the International Balloon Festival, held in Leon, Mexico from 12.11.2021 to 15.11.2021
- Participated in Expo 2020 Dubai in the last week of March 2022

Key Incentives/Policy Support/Schemes

The Ministry of Tourism has sanctioned ₹73.13 crore for the project Development of (Chennai-Mamamallapuram – Rameshwaram – Manpadu – Kanyakumari) in the year 2016-17 under Coastal Circuit theme of its Swadesh Darshan scheme. ₹69.48 crore has been released and the project is complete.

The Ministry of Tourism under its scheme of 'National Mission on Pilgrimage Rejuvenation and Spiritual, Heritage Augmentation Drive (PRASHAD)' has sanctioned two projects in the State of Tamil Nadu, Development of Kanchipuram, and Development of Vellankani with release amount of 13.99 and 4.86 crores

Ministry of Tourism has also provided financial assistance to the State of Tamil Nadu for organizing fairs/festivals & tourism related events under Domestic Promotion & Publicity including Hospitality (DPPH) Scheme.

Ministry of Tourism as part of its Domestic Promotion and Publicity including Hospitality (DPPH) scheme promotes various tourism destinations and products including those related to Eco-Tourism in the country.

Madhya Pradesh

Madhya Pradesh, referred to as the Heart of Incredible India, is a popular tourist destination with unparalleled tourism offerings through its rich culture & heritage; innumerable monuments, large plateau with mountain ranges, rivers, and dense forests cover. The state is home to three UNESCO World Heritage Sites namely Sanchi, Bhimbetka and Khajuraho. Accessibility is its best part. It is equally close to major tourist destinations from all over the country, being the 'Heart of India'.

Tourism Outlook

There has been an unprecedented rise in the arrival of tourists to major tourist spots of the state in the year 2022 as compared to previous year. Following the development of "Mahakal Lok" at Mahakaleshwar temple in Ujjain, there has been a maximum increase of 1796% in the number of tourists visiting Ujjain. There has also been more than 100% increase in the tourists' footfall in Sanchi, Udayagiri, Pachmarhi, Khajuraho and Shivpuri. In 2021, foreign tourist arrivals and domestic tourist visits in the state stood at 0.41 million and 255.54 million, respectively. Based on India Tourism Statistics Report 2022, Madhya Pradesh ranks 8th in the domestic as well as foreign tourist visits category. It shares 3.77% of India's total domestic tourist visits and 3.94% of India's total foreign tourist visits in 2021.

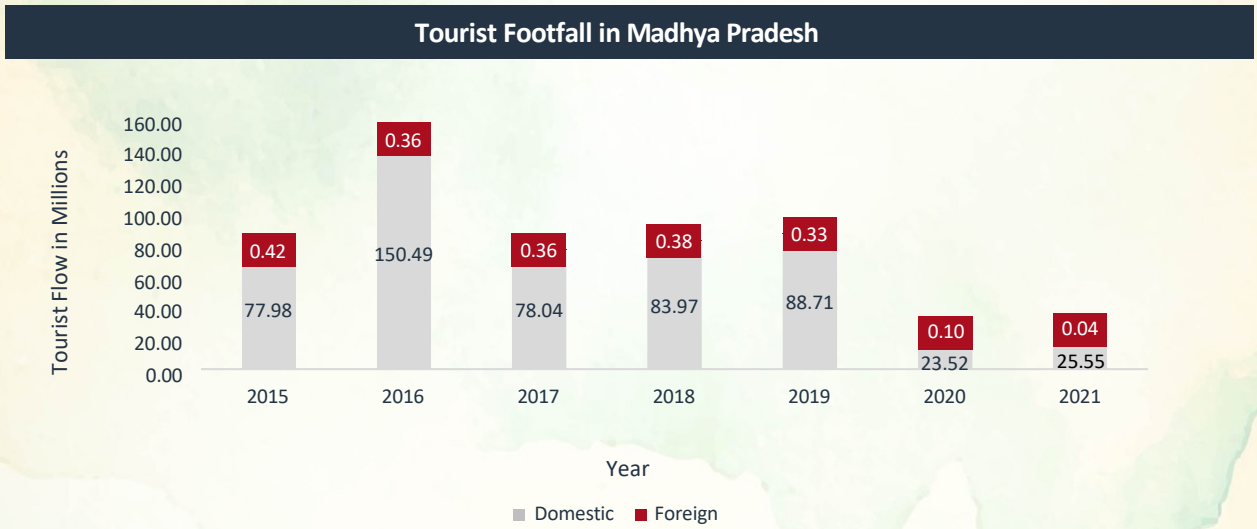


Figure 39: Tourist Footfall in Madhya Pradesh
Source: Source: India Tourism Statistics

Major Tourism Themes Attracting Tourists

Themes	Key Tourist Destinations
Heritage & Cultural Tourism	Gwalior fort, historic town of Orchha, Datia Palace and Chanderi Fort, Rock Shelters of Bhimbetka,
Religious Tourism	Simhastha Kumbh Mela, Mahakaleshwar Jyotirlinga, Omkareshwar jyotirlinga, Orchha, Amarkantak and Chitrakoot, Temples of Khajuraho, e Stupas of Sanchi, Taj-Ul-Masjid, Jama Masjid, and Moti Masjid

Nature-based and Eco-Tourism	25 wildlife sanctuaries, 10 national parks and 6 Tiger Reserves Nauradehi Wildlife Sanctuary, Bagdara Sanctuary, Ghatigaon Sanctuary, Bandhavgarh, Pench and Kanha National Park are few of them. Panchmarhi, Parsili, Tamia, Sailani Island and Madhya Dweep
Wedding & MICE Tourism	Brilliant Convention Centre at Indore Bhopal, Gwalior, Jabalpur and Khajuraho
Adventure Tourism	Kewra dam and Bhopal Lake, Orchha, Pachmarhi

Key Initiatives

01

Project sanctioned under Swadesh Darshan Scheme and PRASHAD Scheme

- Development of Wildlife Circuit at Panna- Mukundpur - Sanjay- Dubri - Bandhavgarh- Kanha - Mukki- Pench
- Development of Buddhist Circuit Sanchi-Satna-Rewa- Mandsaur-Dhar
- Development of Heritage circuit Gwalior – Orchha – Khajuraho – Chanderi – Bhimbetka – Mandu
- Development of Eco Circuit Gandhisagar Dam-Mandleshwar Dam-Omkareshwar Dam-Indira
- Sagar Dam-Tawa Dam- Bargi Dam- BhedaGhat-Bansagar Dam- Ken River

02

Projects sanctioned under PRASHAD Scheme

- Development of Omkareshwar
- Development of Amarkantak

03

National Highway projects of 119 kms worth Rs. 2,300 crore (US$ 279.18 million) in Indore

04

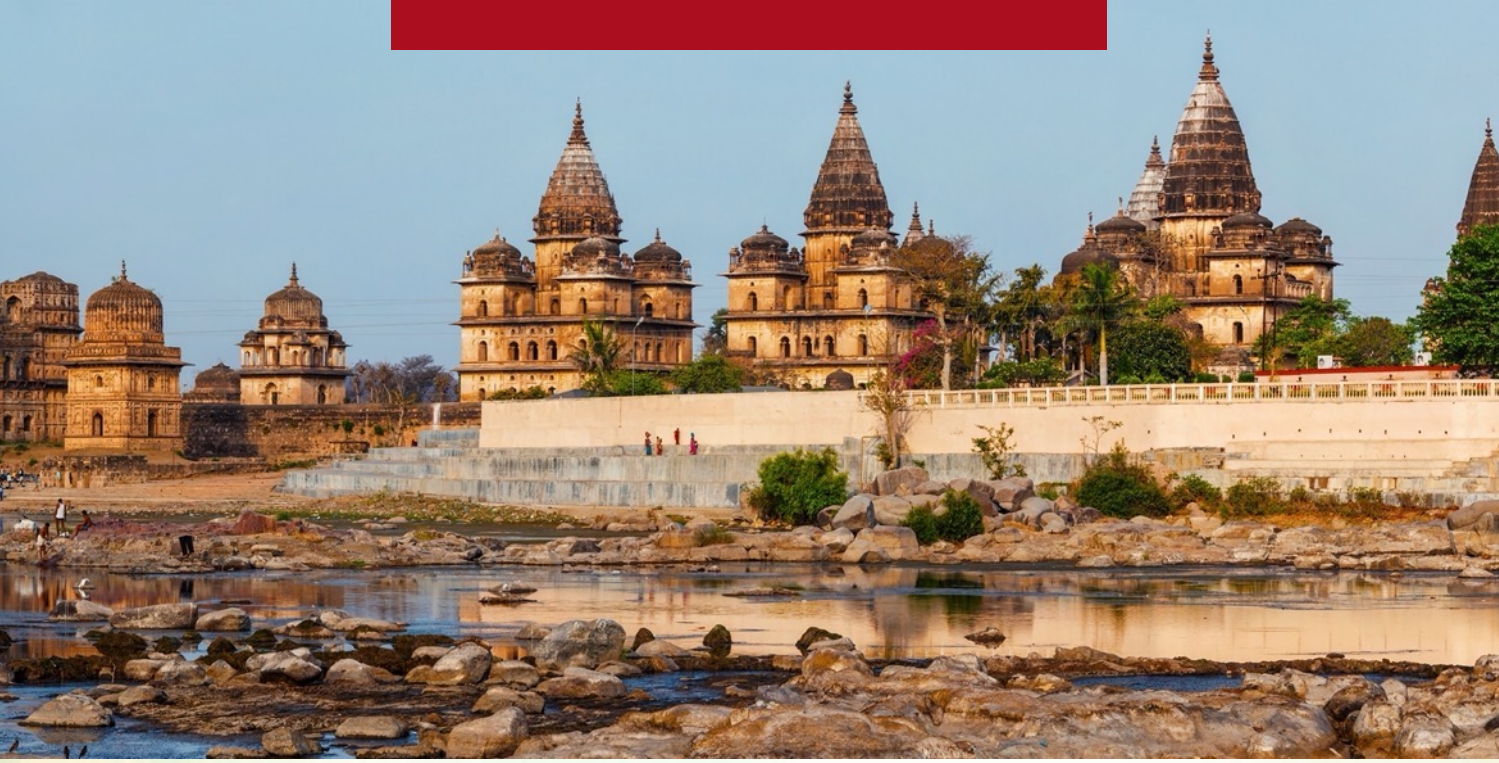
Madhya Pradesh Film Tourism Policy 2020 - To facilitate shootings of feature film, web series, tv series & reality show, documentary and to promote private investment in film tourism in the state

05

Madhya Pradesh ensures the benefits of locals while making the tourists aware of their heritage, culture, and customs through Responsible Tourism Mission

06

Tourism Policy 2012 - promote balanced and sustainable tourism which enables socio-economic development and to establish Madhya Pradesh as a destination that provides a complete tourism experience



Key Incentives/Policy Support/Schemes

In Bhopal & Indore large convention centres of more than 1000 capacity and in Gwalior and Jabalpur medium sized convention centres with capacity of more than 500 persons are to be constructed. International standard convention centres with a capacity of more than 500 persons shall be entitled to 25% capital subsidy (excluding the land cost) with a maximum ceiling of Rs. 10.00 Cr

Exemption in Luxury Tax during “off-seasons”: There shall be complete exemption from Luxury Tax during off-seasons. The period shall be for 3 months.

All new hotels in Bhopal and Indore shall be exempted from Luxury Tax for 5 years and for 8 years if located in rest of the State

All new heritage hotels set up after 01/04/2006 shall be exempted from Luxury Tax for a period of 10 years subject to an investment of Rs. 1.00 Crore.

Transport Department's notification No. F-22-45-2005-8 dated 22/11/2005 provides exemption to Tourist Vehicles from Motor Vehicle Tax for 2 years on designated tourist routes

Exemption from Registration Fee and Stamp Duty for tourism projects in Special Tourism Zones

25 % capital subsidy subject to a maximum ceiling limit of Rs. 1.5 Cr. (not including the cost of the land) will be provided for renovation of the property (Heritage Hotels)

Subsidies will be provided to promote construction of Budget Hotels at places of religious and tourist importance that are declared by the State Government

If any Tourism Project or Heritage Hotel sets up a captive power plant, it shall be exempted from Electricity Duty & Cess

Uttar Pradesh

Uttar Pradesh is a state in northern India that has a rich cultural and historical heritage and is home to many iconic landmarks and tourist destinations. The state is known for its vibrant art and craft, music and dance, festivals, cuisine, and religious diversity. Taj Mahal, Varanasi, Lucknow, Ayodhya, Mathura and Vrindavan are some of its major tourist attractions in Uttar Pradesh.

Tourism Outlook

Domestic tourism grew by 27% in Uttar Pradesh in the financial year 2021-2022 compared to the previous fiscal according to an assessment undertaken by the Union ministry of tourism. In terms of overall domestic tourism activity in the country UP emerged as the second biggest contributor – after Tamil Nadu – with over 16% share in the national pie. Against 8.6 crore tourists in 2020-21, UP was visited by 10.9 crore persons in 2021-22. The state also made it to the top ten states witnessing foreign tourist visits in 2021. UP ranked seventh in the category and accounted for over 4% share of the total foreign tourists' share.

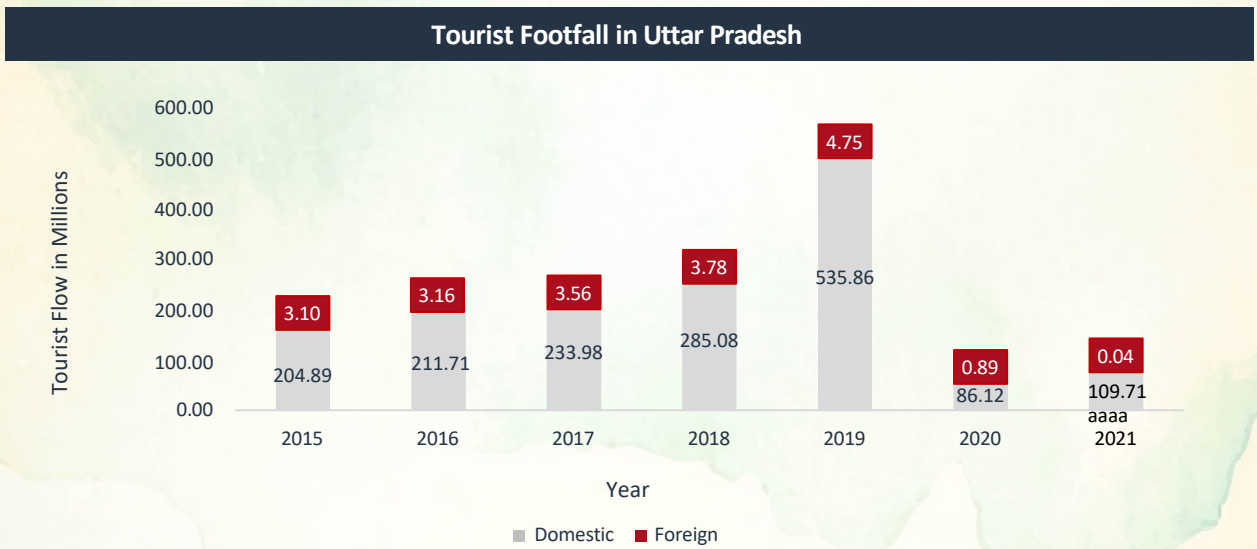


Figure 40: Tourist footfall in Uttar Pradesh
Source: Source: India Tourism Statistics

Major Tourism Themes Attracting Tourists

Themes	Key Tourist Destinations
Heritage Tourism	Taj Mahal, Agra Fort, Fatehpur Sikri and Varanasi Ghats
Religious Tourism	Varanasi, Prayagraj (Allahabad), Mathura, Ayodhya and Vrindavan
Wildlife Tourism	Dudhwa National Park, Chandra Prabha Wildlife Sanctuary, and Kaimoor Wildlife Sanctuary etc.

Adventure Tourism	trekking, mountaineering, river rafting, and skiing in the Himalayan region
Cultural Tourism	Lucknow, Varanasi, and Agra

Key Initiatives

01

Project sanctioned under PRASHAD Scheme

- Development of MathuraVrindavan as Mega Tourist Circuit (Ph-II)
- Construction of Tourist Facilitation Centre at Vrindavan, Distt. Mathura
- Development of Varanasi – Phase –I Cruise Tourism in River Ganga, Varanasi
- Development of Varanasi Under Prashad Scheme – Phase II Development of Infrastructure facilities at Govardhan, Mathura, UP

02

Projects sanctioned under Swadesh Darshan Scheme

- Development of Buddhist Circuit in Srawasti, Kushinagar & Kapilwastu Development of Chitrakoot and Shringverpur under Ramayana Circuit
- Development of Spiritual Circuit in Shahjahanpur-Basti- Ahar-Aligarh-Kasganj-Sarosi-Pratapgarh-Unnao-Kaushambi-Mirzapur-Gorakhpur- Kairana-Domaryaganj- Baghpat-Barabanki- Azamgarh in Uttar Pradesh
- Development of Spiritual Circuit in Bijnor- Meerut- Kanpur-Kanpur Dehat- Banda-Ghazipur-Salempur- Ghosi- Balia-Ambedkar Nagar- Aligarh-Fatehpur- Deoria- Mahoba-Sonbhadra- Chandauli- Mishrikh-Bhadohi in Uttar Pradesh
- Development of Heritage Circuit in Kalinjar Fort (Banda)- Maghar Dham (Sant Kabir Nagar)- Chauri Chaura, Shaheed Sthal (Fatehpur)- Mauhar Sthal (Ghosi)- Shaheed Smarak (Meerut)
- Development of Ayodhya under Ramayana Circuit
- Development of Spiritual Circuit in Jewar-Dadri-Sikandrabad-Noida-Khurja-Banda
- Development of Spiritual Circuit in Gorakhnath Temple (Gorakhpur), Devipattan Temple (Balrampur) and Vatvashni Temple (Domariyagunj)

03

Sanctioned Project under Assistance to Central Agencies scheme for Tourism Infrastructure Development

- Illumination of monuments in Varanasi/Sarnath (Dhamekh Stupa in SarnathChaukhandi
- Stupa in Sarnath, Tomb of Lalkan in Sarnath and Man Mahal in Banaras).
- Illumination of three monuments in Varanasi, Uttar Pradesh: 1. Dashashwamedh Ghat to Darbanga Ghat (stretch of 300 m) 2. Tulsi Manas Mandir 3. Sarnath Museum.
- CFA for Development of Jetties at nine (09) main points of embarkation/ disembarkation of River Cruise on National Water ways No. 1& 2 (Varanasi & Allahabad-I, Allahabad-II), Bihar (Bhagalpur), West Bengal (Kolkata) & Assam (Neamati, Pandu, Jogighopa & Biswanathghat)

Key Incentives/Policy Support/Schemes

Capital funding subsidy of 25% or INR 5 Crore, whichever is less, will be given for the conservation/ expansion/renovation/retrofitting of heritage hotels without altering the basic architectural façade and structure of the heritage building.

The Tourism Department will provide a 50% reimbursement of the excise license fee paid during the first year from date of first issuance of excise license for heritage hotels located in rural areas.

100% of the capital investment subsidy amount shall be granted post the successful start of commercial operations of the eligible tourism unit.

Eligible Tourism Units will qualify for 100% exemption of stamp duty and registration fee on sale/ lease/ transfer of land for the first transaction during the operative period of Uttar Pradesh tourism Policy 2022.

One time grant upto INR 5 Lakh will be granted to individual/ group who support in reviving scarce Art, Culture and Cuisine of the state within a range of 50 kms from famous tourist destinations.

Eligible tourism units would be reimbursed up to 75% of the cost of carrying out energy audit on water harvesting/ conservation and environment-friendly practices and will be eligible for reimbursement of 20% of the capital cost of setting up sewage treatment plant.

Reimbursement of 50% of the certification fee paid on obtaining Green Building Certificate from accredited agencies.

Specific incentives of upto INR. 10 lakhs for ICT (Information and Communications Technology) enablement organization of national and international tour & travel marts, seminars, exhibitions, and other events which employ digital platforms and new Information Technology.

Tour and travel operators will be eligible to receive a onetime financial incentive of INR. 10 lakhs or 25% of production cost of audio/video guide, digital publicity material (digital platform/ mobile application/website/metaverse), artificial intelligence, robotics, virtual reality whichever is lower.

A one-time incentive upto INR. 50,000 would be provided to eligible tourism units for new and innovative projects.

Financial incentive upto 50% of the space rent actually paid subject to a maximum of INR 30,000 per national event or INR 1,00,000 per international event to eligible Tourism Service Providers.

Financial assistance up to the maximum limit of INR 10 Lakh will be provided to recognized organisations & institutes to carry out market research studies on travel and tourism/hospitality sector in Uttar Pradesh.

A onetime grant of INR 10,000 for one year will be provided to youth clubs constituted within government educational institutions.

Goa

Goa is a small state located on the western coast of India, known for its pristine beaches, vibrant nightlife, and unique culture. The Churches and Convents of Goa have been declared a World Heritage Site by UNESCO. Goa is a popular tourist destination in India, attracting both domestic and international tourists throughout the year. Goa has a rich history and culture, influenced by the Portuguese who ruled the state for over 450 years. The state's architecture, food, and music bear witness to this cultural fusion.

Tourism Outlook

Goa has been seeing a steady growth in tourist footfall after the Covid-19 pandemic. In 2021, approximately 3.31 million domestic and 0.02 million foreign tourists prefer Goa as their tourist destination and in 2022 (till September), approximately 49.55 lakh domestic and 0.95 lakh foreign tourists visited the state.



Figure 41: Tourist Footfall in Goa
Source: Source: India Tourism Statistics

Major Tourism Themes Attracting Tourists

Themes	Key Tourist Destinations
Coastal, Cruise Tourism & Adventure Tourism	Ashwem, Galgigbaga Beach, Patnem Beach, Bambolim Beach, Calangute beach, Baga North beach, Vagator North beach, Anjuna north beach, Miramar Beach etc
Nature-based, Wildlife & Ecotourism	Bondla Wildlife Sanctuary, Bhagwan Mahaveer National Park, Cotigao Wildlife Sanctuary, Carambolim Lake, Soccorro Plateau, Morjim Beach, Curtorim Wetland Complex
Heritage Tourism	Basilica of Bom Jesus, Fort Aguada, and the Se Cathedral etc

Key Initiatives

01	Goa Tourism put up an impressive show at India's largest tourism fair, South Asia's Travel & Tourism Exchange (SATTE) at Greater Noida.
02	To make Goa an experience and sustainable tourism destination, the tourism department is largely promoting sustainable tourism activities right from e-bike tours, spice plantation tours, Konkan explorers, regeneration of beaches, eco-resorts to bungee jumping, kayaking and much more.
03	The officials of Goa Tourism has also promoted festivals such as- the Goa Carnaval, Shigmotsav Festival, and Chikal-kalo, encouraging the visitors to participate and enjoy the festival.
04	Goa Chief Minister has launched 3 helicopter services to boost tourism. Heli Tourism will let us explore the hinterlands of Goa like never before.
05	A second greenfield international airport is being developed in Mopa, Goa with an annual capacity to handle 30 million passengers by phase IV.
06	A new export policy for the state is also being prepared to promote exports for manufactured goods and surplus agriculture produce.
07	Union Ministry of Home Affairs (MHA) has identified five islands in Goa, namely St George Island, Grande Island, Pequeno Island, Conco Island and Bhindo Island to carry out holistic development.
08	Introduction of Cruise connectivity between Goa—Mumbai with food, music and party on board.
09	Introduction of 8 hour excursion ride on a boat – Flying Fish. This has facility for scuba diving and snorkelling.
10	Goa tourism has started sea rafting at Arambol beach. The season of operation is from September to May
11	Launched motorized paragliding at Mandrem beach to boost adventure tourism
12	The Goa Tourism Master Plan, 2016 has been developed. Goa Tourism Policy 2019 and 2020 provides the enabling framework for implementation of the GTMP 2016.



Key Incentives/Policy Support/Schemes

The government provides a capital investment subsidy of up to 25% of the investment in the tourism sector. This subsidy is applicable to new and existing tourism units that undertake expansion or modernization projects.

The government provides an interest subsidy of 4% to the tourism units for a period of five years. This subsidy is applicable to loans taken for the development of tourism infrastructure and facilities.

The government provides a power tariff subsidy of 25% to the tourism units for a period of five years. This subsidy is applicable to new and existing tourism units that undertake energy conservation measures.

The government provides a sales tax exemption on goods and services purchased by the tourism units for a period of five years. This exemption is applicable to new and existing tourism units that undertake expansion or modernization projects.

The government waives off the luxury tax on hotel accommodation for a period of five years. This exemption is applicable to new and existing tourism units that undertake expansion or modernization projects.

The government provides financial assistance for training and capacity building of the employees in the tourism sector. This assistance is provided through various schemes and programs.

Chhattisgarh

Chhattisgarh is a state located in central India and is known for its rich cultural heritage, natural beauty, and unique tribal culture. The state has several natural attractions such as waterfalls, wildlife sanctuaries, and national parks that attract tourists from all over the world. Chhattisgarh is also known for its ancient temples, rock paintings, and other historical monuments that are a testimony to the state's rich cultural heritage.

Tourism Outlook

According to the India Tourism Statistical Report 2022, the total number of domestic tourists visiting Chhattisgarh in 2021 was 4.75 million, which is a significant increase of 68.93% compared 2020. The state has seen a steady growth in domestic tourist footfall over the last decade. In terms of foreign tourist footfall, Chhattisgarh is still in the early stages of development as a tourism destination.

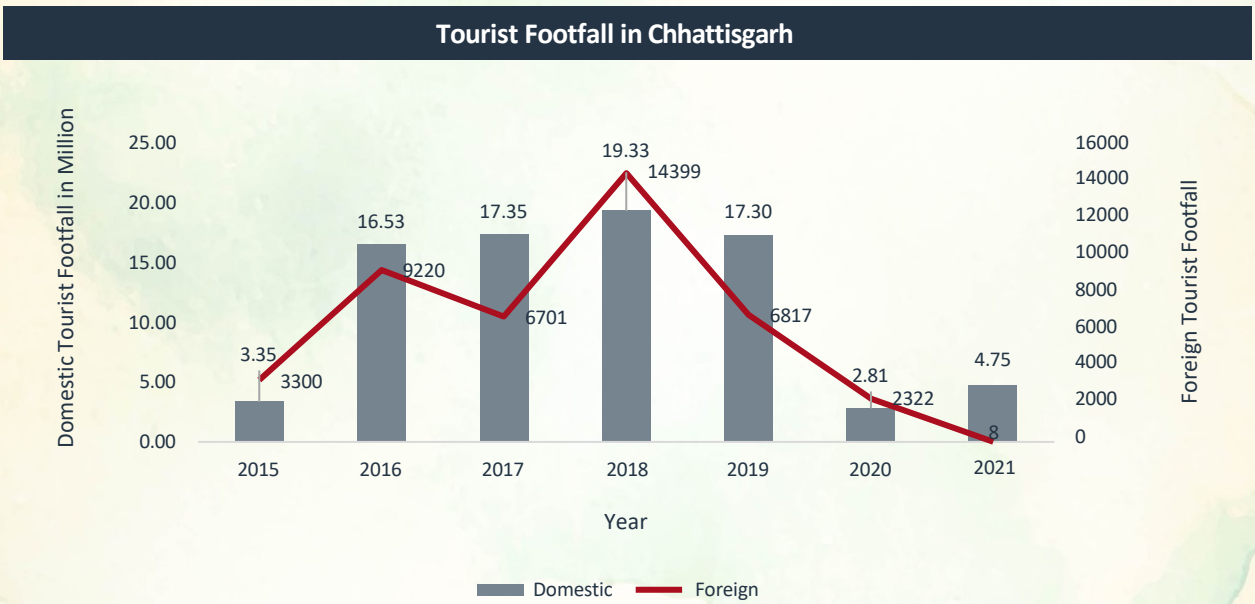


Figure 42: Tourist Footfall in Chhattisgarh
Source: Source: India Tourism Statistics

Major Tourism Themes Attracting Tourists

Themes	Key Tourist Destinations
Cultural Tourism	The state is home to several tribes, each with its own unique traditions and customs. Tourists can explore the cultural richness of Chhattisgarh by visiting the various tribal villages, attending local festivals and fairs, and sampling the delicious local cuisine.
Wildlife Tourism	Kanger Valley National Park, Barnawapara Wildlife Sanctuary, and Indravati National Park etc. Wildlife safaris and nature walks are popular activities among tourists in Chhattisgarh

Adventure Tourism	The state has several scenic trekking routes, including the Chitrakote Falls Trek, the Kanger Valley Trek, and the Bori Wildlife Sanctuary Trek. Tourists can also enjoy river rafting on the Mahanadi and Indravati rivers.
Religious Tourism	Chhattisgarh has several important religious sites, including the Bhoramdeo Temple, the Dudhadhari Math Temple, and the Champaran Temple.
Eco-Tourism	Tourists can explore the state's natural beauty by taking nature walks, bird watching, and camping. The state also has several eco-tourism destinations, including the Tamor Pingla Wildlife Sanctuary and the Achanakmar Wildlife Sanctuary.

Key Initiatives

01

The state government has launched ambitious Ram Van Gaman Path Tourist Circuit project on the auspicious occasion of Navaratri on October 7, 2021.

In the first phase of this project, the plan is to develop the nine spots that fall on the forested route that Shri Ram traversed. These sites include Sitamarhi- Harchowka, Ramgarh, Shivrinarayan, Turturiya, Chandkhuri, Rajim, Sihawa, Jagdalpur and Ramaram.

The projects will restore and develop all the places linked to Lord Ram starting from Koriya district in North Chhattisgarh to Sukma district in South Chhattisgarh.

02

To boost tourism in the Bastar district, the administration has launched a campaign called 'Amcho Bastar' (My Bastar), under which, several activities related to tourism were initiated, such as camping, trekking, boating, heritage walk, stargazing, jungle exploration, river crossing, local cuisine, and village visit for understanding the crafts and tribal culture.

The administration has involved and providing training to locals who could act as guides for the tourists and provide them with appropriate hospitality.

03

Various programs in the B2B segment as well as a new 360 degree marketing campaign are going on.

The marketing campaigns focuses on exploring new destinations that enrich holiday experiences in Chhattisgarh and the training program for travel agents to boost their storehouse of information on the tourist attractions of the State.

04

Chhattisgarh Tourism Board is also working towards offering customized packages to attract tourists from India and across the globe.

05	The government has also been organizing various events and festivals to attract tourists to the state, such as the Chakradhar Samaroh, Rajim Kumbh Mela, and Bastar Dussehra.
06	To encourage and attract private sector investment, Chhattisgarh Tourism's 16 properties have been given on lease for Operation and refurbishment. RFP for 10 more operational properties has also been floated
07	Tribal tourism circuit has been created in the state under the Swadesh Darshan Yojana of the Ministry of Tourism, Govt

Key Incentives/Policy Support/Schemes

The government of Chhattisgarh provides a capital investment subsidy of up to 15% for tourism projects. This subsidy is provided to encourage private investment in the development of tourism infrastructure such as hotels, resorts, and theme parks.

The government also provides an interest subsidy of up to 5% on loans taken by tourism projects for the construction of tourism infrastructure. This subsidy is provided to reduce the financial burden on tourism stakeholders and to encourage investment in the sector.

The government of Chhattisgarh has exempted various taxes for tourism-related businesses. These include luxury tax exemptions for hotels and resorts, entertainment tax exemptions for tourism- related events, and stamp duty exemptions for tourism-related land acquisition.

The government of Chhattisgarh provides subsidies for tourism-related training and skill development programs. This subsidy is provided to encourage the development of a skilled workforce in the tourism sector.

The government provides subsidies for the development of tourism infrastructure such as tourist centers, restrooms, and parking facilities. This subsidy is aimed at improving the overall tourism experience for visitors.

The government of Chhattisgarh provides marketing assistance to tourism stakeholders to promote their products and services. This assistance includes the provision of promotional materials, trade fair participation, and market research.

Uttarakhand

Uttarakhand, a state in northern India crossed by the Himalayas, is known for its Hindu pilgrimage sites. Rishikesh, a major centre for yoga study, was made famous by the Beatles' 1968 visit. The city hosts the evening Ganga Aarti, a spiritual gathering on the sacred Ganges River. The state's forested Jim Corbett National Park shelters Bengal tigers and other native wildlife

Tourism Outlook

The state has now emerged as one of the fastest growing states in tourism. Based on India Tourism Statistics Report 2022, it has ranked 12th in the domestic tourist visits category while it stands at 15th position in foreign tourist visits. It shares 2.87% of India's total domestic tourist visits and 0.81% of India's total foreign tourist visits in 2021.

Tourist Footfall in Uttarakhand

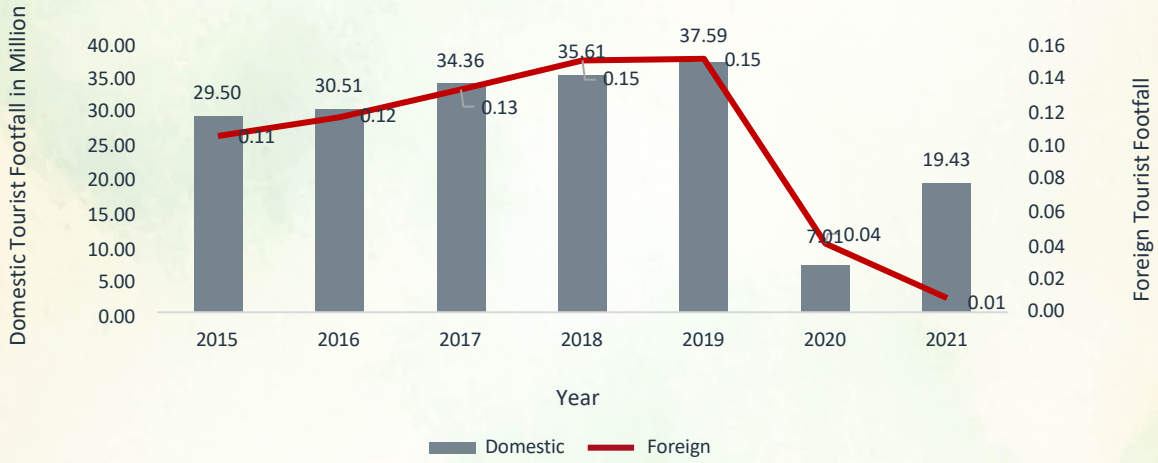


Figure 43: Tourist Footfall in Uttarakhand
Source: Source: India Tourism Statistics

Major Tourism Themes Attracting Tourists

Themes	Key Tourist Destinations
Spiritual Tourism	Uttarakhand, also known as Devbhoomi or the Land of Gods, is home to numerous temple towns, Char Dhams (Gangotri, Yamunotri, Badrinath, Kedarnath), and welcomes devotees all year round, with Rishikesh and Haridwar being the key gateway hubs.

Adventure Tourism	Uttarakhand is the ultimate adventure destination and houses multiple thrill-seeking activities. Bestowed with snow-carpeted slopes ideal for high-altitude skiing, the Himalayan ranges for trekking, mountaineering and rock climbing, gurgling rivers for white water rafting, pristine lakes for canoeing and kayaking, and mountain paths best suited for biking challenges - there is no dearth of adventure sports here. Key Tourist Destinations for Adventure tourism are: Auli, Rishikesh, New Tehri, Nainital, Sattal, Chopta, Mussoorie
Nature Tourism	Untouched nature in all its splendour is what Uttarakhand offers visitors. The mighty Himalayas, a rich variety of flora and fauna, a pleasant climate, and a peaceful and serene environment. From Uttarakhand's glaciers spring some of the major rivers of India, including the Ganga and the Yamuna. Snow- covered mountain peaks, like Nanda Devi, Badrinath, and Kamet, offer stunning views, while oak, rhododendron, deodar, and pine forests leave one in awe.
Wildlife Tourism	A haven for nature and wildlife enthusiasts, ornithologists, botanists, and tourists and adventurers in general - Uttarakhand's rich and varied wildlife never ceases to amaze. The state boasts as many as 6 national parks - including the popular Jim Corbett National Park, Nanda Devi National Park, Rajaji National Park, Gangotri National Park, Binsar Wildlife sanctuary, Asan barrage

Key Initiatives

01 New Tehri: A modern town has been developed for promoting the tourism, New Tehri is an adventure tourism hub. Overlooking the massive Tehri Lake and dam, the well-planned town draws tourists, who come here for its natural beauty and the opportunity to enjoy innumerable water sports in the lake. The dam is the highest of its kind in India and is regarded among the world's largest hydroelectric projects. It stands on the Bhagirathi river.

02 Uttarakhand Tourism has taken the initiative in sports tourism as they are conducting the 1st National Open Paragliding Accuracy Championship in Kapkot, Bageshwar from 12-14 April. Top Pilots from all over India will Participate and captivating showcase of skill & precision

03 Kartik Swami Temple is another initiative for promoting spritual and religious tourism in Uttarakhand. Tourists can do trekking, can enjoy Village tourism, photography with clear view of the surrounding mountain peaks from the Kartik Swami Temple is awe-inspiring and Bird Watching as it is is a perfect site for bird-watching. Lookout for eagles, especially the golden eagle, and the monal.



Key Incentives/Policy Support/Schemes

50 percent subsidy will be given by the government for investing in unexplored places from the point of view of tourism.

Under the new policy, the government will give subsidies on capital investment based on category. In this, 25 percent subsidy will be given in category-A areas, 35 percent in selected areas in category-B and up to 50 percent subsidy will be given for investment in the tourism sector of category-C areas

100 percent subsidy will be given on investment in Heli tourism, Caravan tourism, Adventure, Cab operator

100% exemption in stamp duty will be given on investment in the tourism sector.

Financial incentive will be given for investment in Helium, Hot Air Balloon, Billips, Cab Operator, Helicopter, Water Plane, Caravan, Motor House, Cruise Boat, House Boat, Yacht, Adventure Trekking, Rock Climbing, Water Sports, Vote Race, Skating, Fishing, Aero Sports, Ropeway, Hotel and Resort with at least 15 rooms, Floating resort, Heritage hotel, Hotel and Motel, Spa health resort, Wellness resort, Tourist resort, Art gallery, Amusement park, etc.

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Jharkhand

Jharkhand, located in eastern India, boasts of abundant natural resources including lush forests, lofty hills, and sparkling waterfalls. It is also home to numerous wildlife sanctuaries and places of worship, making it a popular destination for both tourists and pilgrims. The region has a rich history dating back to the Stone Age, with evidence of human habitation found in ancient cave paintings and tools.

Tourism Outlook

Based on the India Tourism Statistics report for 2022, Jharkhand has shown an improvement in its national ranking with regards to the inflow of tourists. The domestic tourist count for the year 2021 was 3.38 million while the foreign tourist count was 1637. The number of domestic tourists has increased by 31.51% while the foreign tourist count rose by 70.06% from 2020 to 2021.

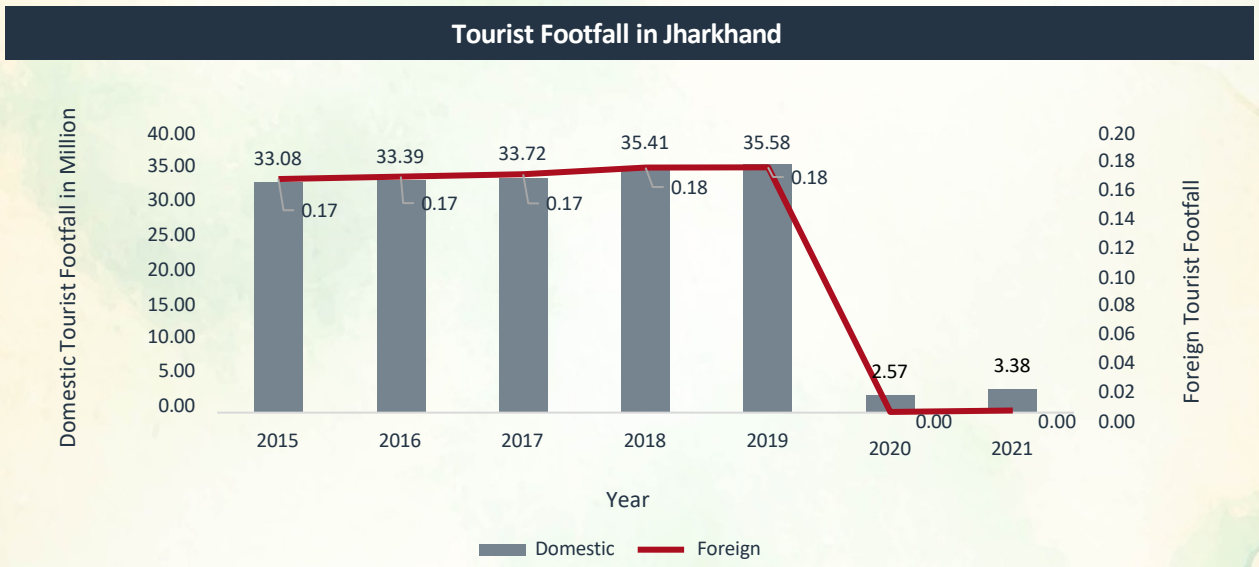


Figure 44: Tourist footfall in Jharkhand
Source: Source: India Tourism Statistics

Major Tourism Themes Attracting Tourists

Themes	Key Tourist Destinations
Eco Tourism	Jharkhand with a huge forest cover of 33% has a immense scope for eco-tourism. The lush green jungles, the perennial waterfalls, the terrain, the moderate climate, the rich wildlife makes it an ideal destination for developing eco-tourism activities like forest trails, nature walks, jungle safaris, trekking, rock climbing etc. Destinations are: West Singhbhum Jubilee Park, Nakshtra Van, Birsa Deer Park, Kalamati, Nandan Pahar, tatapani Hot Water Spring

Adventure tourism	The Tourism department of Jharkhand is committed to promote adventure tourism activities at many water bodies in the region. Adventure sports were held at the Getalsud dam in Ranchi, Chandil dam in Saraikela Kharsawa, Patratu in Ramgarh, Maithon dam situated in Dhanbad, Tilaiya dam in Koderma, and Massanjore dam in Dumka.
Art and Cultural Tourism	Most of the folk dance around Jharkhand is accompanied by traditional music played by the musicians using some traditional musical equipment. Some of the very famous Jharkhand dances are: Paika, Chhau, Santhal, Karma etc. Each sub-caste and tribal grouping Jharkhand has a unique tradition to uphold: Oraon comb-cut paintings, Ganju, Prajapati, Rana &Teli, Kurmi and Mundas, etc.
Religious Tourism	Religious tourism is one of the most popular forms of tourism in Jharkhand, as crores of pilgrims visit number of shrines throughout the year. The pilgrimage sites of Jharkhand are: The Baba Baidyanath Dham in Deoghar, The Sun Temple in Ranchi, The Jagannath Temple in Deoghar and the Angrabadi Temple in Khunti
Heritage Tourism	Jharkhand is famous for its rich heritage and ancient tribal culture. Jharkhand's glorious past and cultural diversity make a potent blend that attracts tourists each year to its heritage tourist attractions. Some of the Heritage attractions are: Megaliths of Hazaribagh, Tanginath, Navratangarh fort, Dalma Hill top, Dumka Jama etc

Key Initiatives

01	Deoghar Airport: A new airport has been built in Deoghar to improve air connectivity and promote tourism in the region. The airport is expected to boost religious tourism in Deoghar, which is home to the Baidyanath Dham temple.
02	Palamu Tiger Reserve: The state government is working to develop Palamu Tiger Reserve as a major eco-tourism destination.
03	Mukhyamantri Swabhiman Yojana: This scheme aims to promote tourism in rural areas by providing financial assistance to local households for the development of homestays. This will help tourists experience the local culture and traditions of Jharkhand.
04	Jharkhand has identified tourism circuits such as the Tribal, Buddhist, and Heritage Circuits, and is developing them to promote tourism. The government is also developing Ranchi Lake and Palamu Fort circuits to attract more tourists.



05	The state government is promoting local festivals and events such as the Sarhul Festival, the Karma Festival, and the Tusu Festival to attract tourists and showcase the cultural diversity of Jharkhand.
06	The state government is promoting homestays to promote rural tourism and provide tourists with an authentic experience of local culture and traditions
07	The state government is organizing skill development programs for tourism stakeholders, such as guides, drivers, and homestay owners, to improve the quality of services offered to tourists.

Key Incentives/Policy Support/Schemes

The state government provides a subsidy on capital investment made in the tourism sector. The subsidy ranges from 15% to 25% of the total investment, depending on the location and the category of the tourism project.
The state government provides an interest subsidy on loans taken for tourism projects. The subsidy ranges from 5% to 7% of the interest payable, depending on the location and category of the tourism project.
The state government provides exemption from land conversion fees for tourism projects in approved tourism zones.
The state government provides exemption from electricity duty for tourism projects for a period of five years from the date of commencement of commercial operations.
The state government provides exemption from stamp duty for lease or transfer of land for tourism projects.

India's Presidency for G20 – 2023





India holds the Presidency of the G20 from first December 2022, to November 30, 2023. The 43 Heads of Delegations- the largest ever in G20-will be participating in the final New Delhi Summit in September. India's G20 Presidency is working to promote the universal sense of one-ness. Hence the theme of India's G20 Presidency is - "Vasudhaiva Kutumbakam" or "One Earth · One Family · One Future".

For India, the G20 Presidency also marks the beginning of "Amritkaal", the 25-year period beginning from the 75th anniversary of its independence on 15 August 2022, leading up to the centenary of its independence, towards a futuristic, prosperous, inclusive, and developed society, distinguished by a human-centric approach at its core.

India's G20 Priorities:



Focused Sectors



G20 – A premier forum for economic cooperation[15]

Collectively, the G20 accounts for 85% of global GDP, 75% of international trade and two-thirds of the world population, making it the premier forum for international economic cooperation. The G20 plays an important role in shaping and strengthening global architecture and governance on all major international economic issues, reflecting a recognition that global prosperity is interdependent, and our economic opportunities and challenges are interlinked.

India's overarching G-20 priorities[16]

India's G20 priorities revolve around inclusive, equitable and sustainable growth; LiFE; women's empowerment; digital public infrastructure and tech-enabled development in various important areas. India will be able to identify, highlight, develop and strengthen international support for priorities of vital importance to developing countries in diverse social and economic sectors, including in focus areas that impact the most vulnerable and disadvantaged.

[15] Ministry of Tourism, International Cooperation Division
[16] Ministry of Tourism, International Cooperation Division

India's G20 Presidency – An unparalleled opportunity for Tourism[17]

To revive international tourism post-pandemic and to ensure India is promoted as a holistic destination in the tourism generating markets to increase the country's share in the global tourism market, the Government of India declared Incredible India! Visit India Year 2023 as its campaign tagline. It was over two decades back, in 2002, that the Incredible India initiative was officially branded to promote the country as a destination of choice for the discerning international traveller. Now, using the backdrop of India's G20 Presidency, efforts are on to resuscitate the industry which went through a rough patch during the period of the pandemic.

During India's G-20 Presidency, more than 200 meetings will be held at more than 50 locations across the countries. These will include working group meetings, ministerial meetings and finally culminating in the Summit which will be held at New Delhi. All these destinations will draw global attention which will be an unparalleled opportunity to highlight India's tourism offerings and share India's success stories on the global stage. This would also result in economic opportunities.

India's G-20 Tourism priorities

There are the shared vision of Central Government, State Governments and Private Sector to position tourism sector, post pandemic, at the centre of accelerating economic growth and achieving 2030 sustainable development goals. The priorities are also duly enshrined in the draft National Tourism Policy.

Building on the policy action areas identified by the Tourism Working Group in the past, the G20 Tourism Working Group during India's G-20 Presidency is working on five inter-connected priority areas identified by India. They are as follows:



[17] Ministry of Tourism, International Cooperation Division

Green Tourism - Greening of tourism sector for a sustainable, responsible, and resilient tourism sector

Prior to the Covid-19 pandemic, the sector accounted for over 10% of global GDP and 10% of jobs worldwide with international tourist arrivals predicted to rise from 1.1 billion in 2014 to 1.8 billion in 2030. Due to this, in a 'business-as-usual' scenario, by 2050 tourism sector (globally) is set for an increase of 154% in energy consumption, 131% in greenhouse gas emissions, 152% in water consumption and 251% in solid waste disposal.[18]

Travel & Tourism sector is known to leave significant environmental and carbon footprints. Additionally, the growing plastics production and use, needs special attention of the tourism sector to ensure reduction of plastic and enhance circularity in its use.

Looking into these all, the three important initiatives on sustainable Tourism, has been signed by the Ministry of Tourism, the United Nations Environment Program (UNEP) and Responsible Tourism Society of India, with an objective to accelerate sustainable consumption and production (SCP) in tourism policies and practices for addressing the triple planetary crisis and accelerate low carbon, climate resilient and green economic transformation of tourism sector[19]

Travel for LiFE Pledge	Responsible Traveller Campaign	Global Tourism Plastics Initiative

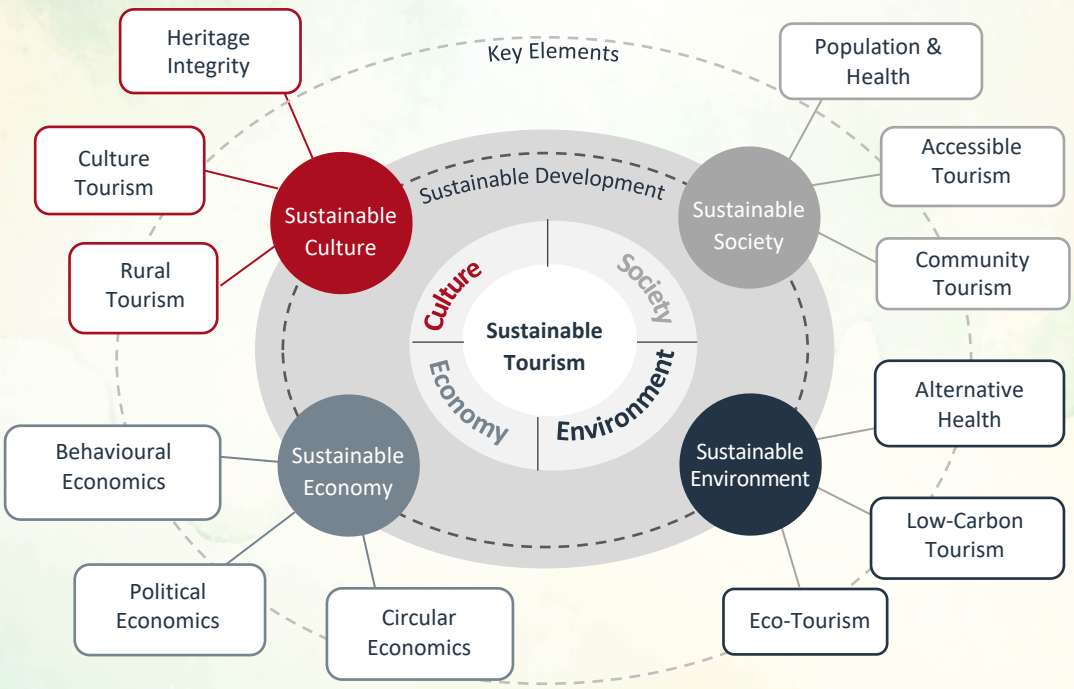


Figure 45: Elements of Green Tourism
Source: https://www.sciencedirect.com/science/article/abs/pii/S004896971831194X

[18] https://pib.gov.in/PressReleasePage.aspx?PRID=1878911#_ftn1
[19] https://pib.gov.in/PressReleasePage.aspx?PRID=1878911

Digitalization – Harnessing the power of digitalization to promote competitiveness in tourism sector

Digitalization has the potential to transform the tourism industry by enhancing the competitiveness of tourism destinations, improving the efficiency of tourism businesses, and providing travellers with personalized and immersive experiences. Here are some ways in which digitalization can be harnessed to promote competitiveness in the tourism sector:

Digital marketing and promotion: Digital platforms such as social media, search engines, and online travel agencies can be used to market and promote tourism destinations and businesses. By leveraging the power of digital marketing, tourism businesses can reach a wider audience and target specific segments based on their interests and preferences.

Big data analytics: Tourism businesses can use big data analytics to gain insights into consumer behavior, preferences, and trends. This can help them to develop targeted marketing campaigns and optimize pricing strategies to attract and retain customers.

Mobile apps and websites: Mobile apps and websites can be used to provide travellers with real-time information about destinations, attractions, and events. This can enhance the overall travel experience and help travelers make informed decisions about their itinerary.

Virtual and augmented reality: Virtual and augmented reality technologies can be used to provide travellers with immersive and interactive experiences. For example, virtual tours of attractions, museums, and historical sites can be created to give travellers a taste of what they can expect to see and do.

Smart tourism destinations: The concept of smart tourism destinations involves the integration of digital technologies into all aspects of tourism, from planning and booking to transportation and accommodation. This can enhance the sustainability, efficiency, and competitiveness of tourism destinations.



The National Digital Tourism Mission (NDTM) is being formulated to ensure the digitalization of the Tourism sector in Mission Mode and India has built many large scales Digital Public Infrastructure such as Aadhar for Identity and UPI for real-time payments.

Skills – Empowering youth with skills for jobs and entrepreneurship in tourism sector

Tourism has the potential for generating maximum number of jobs with least investment and therefore tourism can be a positive force for economic transformation, rural development, and community wellbeing. Showcasing the villages, country's way of life, country's spiritual and cultural heritage and country's natural beauty, roadmap for the development of Rural Tourism in line with the vision of "Self-Reliant India'' or 'Aatmanirbhar Bharat' is to be promoted. Tourism provides a channel for Enabling the sale of local products and services, Empowering the youth to become entrepreneurs; Employing women, and disadvantaged communities such as tribals and thus leading to community empowerment and Poverty alleviation.

To succeed in this field, it is essential to have the necessary skills and knowledge. Here are some ways to empower youth with skills for jobs and entrepreneurship in the tourism sector:



Vocational training programs: Offer vocational training programs that teach specific skills related to the tourism industry, such as hospitality, culinary arts, tour guiding, customer service, and event planning. These programs can be conducted in collaboration with local tourism businesses and associations.



Internships and apprenticeships: Provide opportunities for young people to gain hands-on experience in the tourism industry through internships and apprenticeships. This allows them to apply the skills they have learned in a real-world setting and make valuable industry connections.



Business and entrepreneurship training: Offer training programs that focus on developing entrepreneurial skills, such as marketing, finance, and business management. This can help young people start their own tourism-related businesses, such as tour operators, travel agencies, or accommodation providers.



Mentorship programs: Pair young people with experienced mentors in the tourism industry who can provide guidance and advice on career and business development.



Digital skills training: In today's digital age, it is essential for young people to have digital skills such as social media management, website development, and online marketing. Offer training programs that focus on developing these skills.



Soft skills training: Soft skills such as communication, teamwork, and problem-solving are essential in any industry, including tourism. Offer training programs that focus on developing these skills, as they can greatly enhance a young person's employability and entrepreneurial potential.

Tourism MSMEs – Nurturing tourism MSMEs / Startups/ private sector to unleash innovation and dynamism in tourism sector

Tourism MSMEs (micro, small and medium-sized enterprises) play a vital role in the tourism sector, as they are often the backbone of local tourism ecosystems. Nurturing these enterprises can unlock significant innovation and dynamism in the tourism industry. Here are some ways to support and foster tourism MSMEs:



Access to finance: Tourism MSMEs often struggle to secure financing due to their size and lack of collateral. Governments can support tourism MSMEs by providing access to finance, either through loans or grants, or by supporting the development of alternative financing mechanisms such as crowdfunding platforms.



Business development services: Tourism MSMEs often lack the necessary skills and knowledge to grow their businesses. Governments can provide business development services such as training, mentoring, and coaching to help these enterprises overcome their challenges.



Market access: Tourism MSMEs often face barriers to entering new markets. Governments can help these enterprises expand their reach by providing access to market information, facilitating networking opportunities, and supporting their participation in trade shows and other events.



Innovation support: Tourism MSMEs can benefit from support to foster innovation and creativity. Governments can provide funding for research and development, as well as innovation hubs and incubators, to help these enterprises bring new products and services to the market.



Policy support: Governments can create an enabling environment for tourism MSMEs by developing policies that support their growth and sustainability. This can include regulatory frameworks that promote entrepreneurship, tax incentives for small businesses, and initiatives to support local supply chains.



Collaboration and partnerships: Tourism MSMEs can benefit from collaborations and partnerships with other enterprises, as well as with government agencies, academic institutions, and civil society organizations. Governments can facilitate these collaborations by creating platforms for information sharing, networking, and collaboration.

Destination Management – Strategic management of destinations towards overall competitiveness of destination

Destination management refers to the strategic management of a destination to enhance its overall competitiveness. It involves a range of activities that are aimed at creating an environment which is attractive to visitors, while also ensuring that the local community benefits from tourism.

Effective destination management involves several key steps, including:

Developing a strategic plan: This involves identifying the strengths and weaknesses of the destination and developing a plan to address these issues.

Stakeholder engagement: Effective destination management requires collaboration between a range of stakeholders, including local authorities, tourism businesses, community groups, and visitors.

Destination branding: Creating a strong brand for the destination can help to differentiate it from competitors and attract more visitors.

Marketing and promotion: Effective marketing and promotion is essential for raising awareness of the destination and encouraging visitors to choose it over other options.

Infrastructure development: Ensuring that the destination has adequate infrastructure, including transport links, accommodation, and attractions, is crucial for attracting and retaining visitors.

Sustainability: Sustainable tourism practices are becoming increasingly important, and destinations that can demonstrate a commitment to sustainability are likely to be more attractive to visitors.

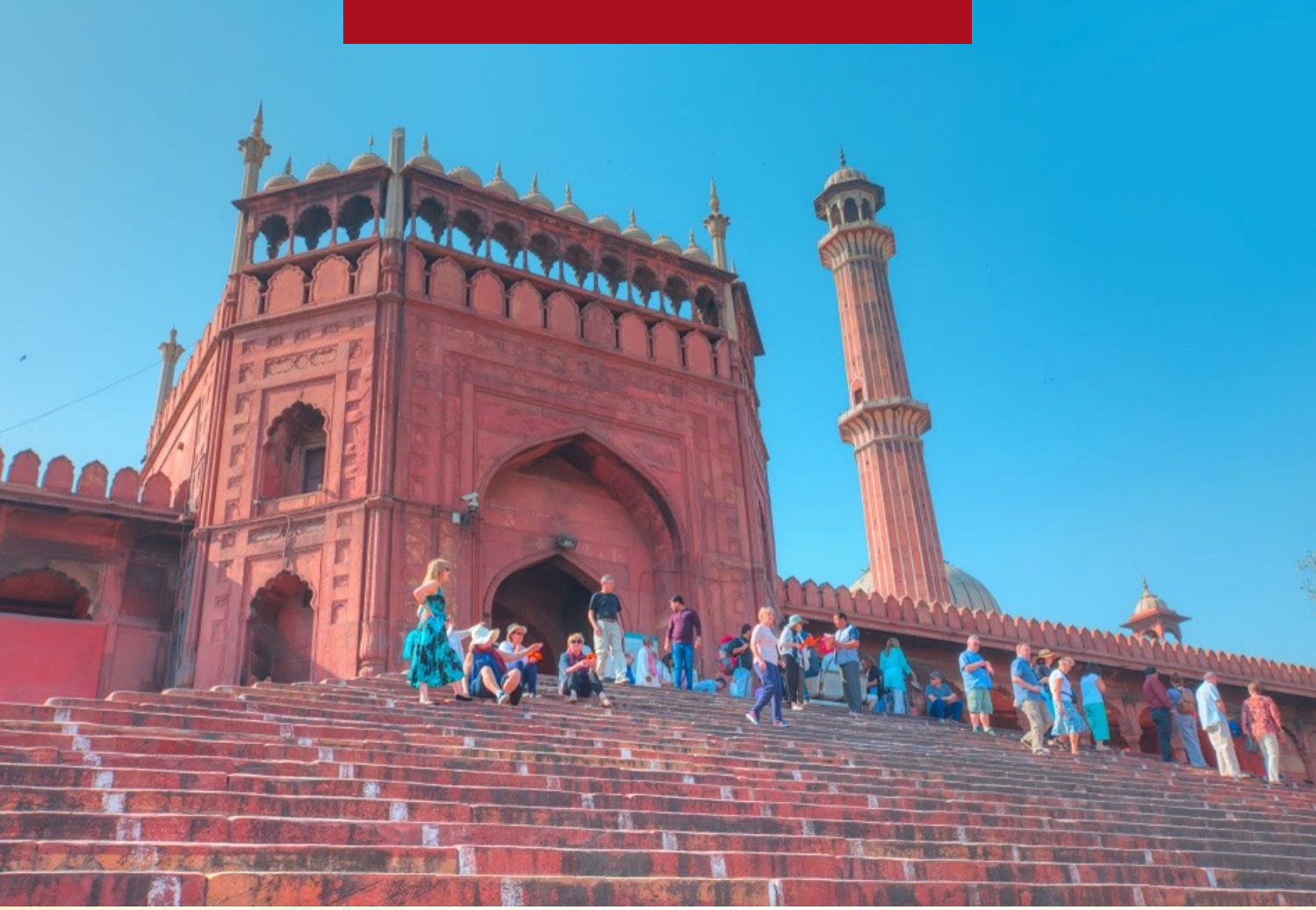


Overall, effective destination management is critical for the long-term competitiveness of a destination. By taking a strategic approach and engaging with stakeholders, destinations can create an environment that is attractive to visitors while also benefiting the local community.



Nation@2047: Tourism Perspective





"Vision India@2047 aims to make India a preferred tourism destination, loved by both global and domestic tourists. The vision envisages to increase tourist arrivals, create employment opportunities, and expand revenue generation from the tourism sector. The Ministry of Tourism has prepared a draft National Tourism Policy 2022 and plans to achieve this vision through formulation of new schemes and policies, institutional and structural reforms, improvement in ranking for benchmarking standards, creation of human resources, leveraging technology for promotion and delivery of tourism-related services. The guiding principles include promoting sustainable, responsible, and inclusive tourism in line with our civilizational ethos.

Table 10: Targets for tourism sector in India as per National Tourism Policy 2022

	2023	2030	2040	2047
International Tourist Arrival (in Mn)	13	25	56	100
Domestic Tourist Visits (in Bn)	2	4	10	15
Foreign Exchange Earnings (in USD Bn)	30	56	175	400
Employment (in Mn)	88	137	257	400
Tourism GDP (in USD Bn)	143	248	550	1000

Key Strategic Objectives of National Tourism policy

- To enhance the contribution of tourism to the Indian economy by increasing visitation, stay, and spending and making India a year-round tourist destination.
- To create jobs and entrepreneurial opportunities in the tourism sector and ensure the supply of skilled workforce.
- To enhance the competitiveness of the tourism sector and attract private sector investment,
- To preserve and enhance the cultural and natural resources of the country.
- To ensure sustainable, responsible, and inclusive development of tourism in the country
- It also aims to give impetus to digitalization, innovation, and technology through the National Digital Tourism Mission and skilling through the Tourism and Hospitality Sector Skill Mission.

The whole Government Approach

The Policy follows a whole Government approach to address the major and multifaceted challenges faced by the tourism industry and to develop the tourism sector in the country. Due to its cross-cutting and fragmented nature, tourism policy development is an increasingly complex process, with longer time scales and a wider scope than in the past. The whole of Government approach not only amongst the line Ministries of Central Government but also between Central and State Governments as both are involved in tourism in a variety of capacities including:

- marketing and promotion;
- border security;
- the regulation of markets such as aviation;
- planning regulations;
- controlling or managing tourism attractions such as national parks;
- skills development; and
- funding the development of roads and other infrastructure.



India's take on: Tourism to be USD1 Trillion Sector by 2047

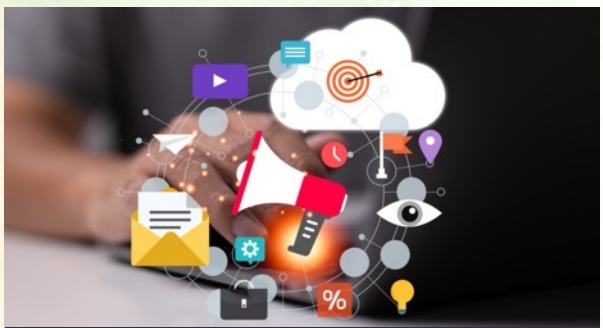
The ministry of tourism has formulated a draft National Tourism Policy 2022 and has launched a number of initiatives and implementing a four-pronged development strategy that focuses on:



Improving the connectivity - air, rail, and roads



Enhancing the tourism infrastructure and dependent services



Streamlining branding and promotion



Showcasing the culture and heritage

It has also launched a number of schemes that includes Bharat Gaurav Scheme, SWADESH Darshan Scheme, PRASHAD Scheme, Buddhist Enclave and Dekho Apna Desh initiative etc. It has started identifying, diversifying, development and promotion of niche tourism products to promote India as a 365 days destination. The Centre announced that several visa reforms will be undertaken, while immigration will also be made more visitor friendly.

The Future of Tourism Industry with advancement of Technology and Digital Platforms

On July 23, 2021, the Ministry of Tourism constituted an inter-ministerial task force for the National Digital Tourism Mission. The mission is intended to connect stakeholders in the tourism eco-system digitally in the same lines of the National Health Mission. Digitalization is key to bring tourism activities under a unified system and thereby enhance the competitiveness of the Hospitality & Tourism sector.

The National Digital Tourism Mission (NDTM) proposes the creation of a Unified Tourism Interface (UTI) to enable the exchange of data among the various stakeholders of the tourism ecosystem such as tourists, travel agents, accommodation providers, transport providers, food and beverage providers, and entertainment providers through digital highways. Such a Unified Tourism Interface would enable an open and interoperable network for search, discovery, information exchange and digital transactions which can herald the next generation tourism services. This interface is envisaged to enable both private and public solutions and applications to become a part of the tourism eco-system.

The NDTM is envisaged to bring the following benefits to the various stakeholders of the tourism ecosystem.

Ministry

- Planning & decisions backed by trusted information
- Better resource utilization
- Simplified service delivery
- Identification Enforcement of Regulations
- Improved coordination with sister Ministries

Tourists

- Connected Ecosystem Experience
- Personalized Tour Plans
- Trusted information regarding tourism services & providers
- Access to aggregate information
- Easy regulatory compliance

Tour Services

- Greater connectedness with hospitality service providers
- Real time feedback and flexibility in terms of time and action
- New platforms for collaboration

Start-Ups, Industry

- Reliable access to service providers
- Cost savings and reduced time to market
- Access to Research Data
- Ability to create multiple aggregate platforms

Accommodation Providers

- On-boarding with multiple aggregator platforms
- Fair price mix
- Resource Sharing

Mobility Providers

- On-boarding with multiple aggregator platforms
- Fair price mix
- Greater flexibility

Figure 46: Potential Benefits of NDTM
Source: https://www.medianama.com/2022/03/223-summary-national-digital-tourism-mission-report/

By 2047, the tourism industry in India will have hopefully undergone significant changes and advancements, thanks to the widespread adoption of technology and digital platforms. Here is a vision of what the industry may look like in 2047:

Personalized Travel Planning

With the help of Artificial Intelligence (AI), tourists will be able to plan their trips in a much more personalized manner. AI will analyze a traveler's interests, preferences, and previous travel patterns to create custom itineraries that cater to their individual needs.

Seamless Booking Experience

The booking process will be seamless, with travelers being able to book flights, hotels, and activities through a single platform. Payment processes will be quick and secure, with the option to pay in various currencies.

Virtual Reality (VR) Tours

Virtual reality tours will become the norm, allowing tourists to experience destinations before they even arrive. This will enhance the traveler's experience and help them make better-informed decisions about their travel plans.

Smart Destinations

With the advent of the Internet of Things (IoT), destinations will become smarter, with everything from traffic management to waste management being automated. This will result in more efficient and sustainable tourism.

Digital Guides

Tourists will have access to digital guides that provide them with information about the destinations they are visiting. These guides will offer recommendations for places to visit, things to do, and where to eat.

Augmented Reality (AR) Experiences

AR experiences will become more prevalent, allowing tourists to interact with their surroundings in new and exciting ways. This will help them learn more about the culture and history of the places they are visiting.

Social Media Integration

Social media platforms will play a crucial role in tourism, with travelers being able to share their experiences with their friends and family in real-time. This will help promote tourism in India and attract more visitors to the country.

Sustainable Tourism

With the increasing focus on sustainability, tourism in India will become more environmentally friendly. Tourists will be encouraged to participate in eco-friendly activities and support local businesses that prioritize sustainability

Smart Transportation

Transportation in India will become smarter, with the integration of AI and IoT. This will result in more efficient and cost-effective transportation options for tourists.

E-Visa and Contactless Check-In

E-visas and contactless check-in will become the norm, making the entry process into India much smoother and faster for tourists.



Way forward



The growing influence of the tourism sector as an economic powerhouse and its potential as a tool for development are irrefutable. Not only does the tourism sector spearhead growth, it also improves the quality of people's lives with its capacity to create large scale employment of diverse kind. It supports environmental protection, champions diverse cultural heritage and strengthens peace in the world. Currently, of the total tourist traffic in India, in volume terms, only 7.1% is inbound travel. According to the Federation of Associations in Indian Tourism & Hospitality (FAITH), this would increase to 15.9% by 2035. This could drive revenues from inbound tourists up from 9.9% in 2019 to 13.2% by 2035. In year 2022, India recorded Foreign Tourist Arrivals (FTAs) of 6.19 million (Provisional) with a growth of 305.4% over previous year. The World Economic Forum's (WEF) ranked India 54th position (down from 46th in 2019) with a score of 4.1 in its Travel and Tourism Development Index 2021. But still, India remains the top performer in South Asia.

The future of inbound tourism in India looks promising, provided that the country continues to make efforts on multiple fronts to fully unlock the potential. Following are some of the majors which can help in accelerating the growth of Indian tourism industry:

Streamline visa processes: The visa process for foreign tourists can be a significant deterrent for those who are interested in visiting India. The government can work on simplifying the visa process by making it more accessible, user-friendly, and efficient.

Address safety concerns: Safety concerns, particularly for female travelers, continue to be a significant issue in India. The government can work on improving the safety of tourists by increasing the number of tourist police and introducing measures to prevent harassment and crimes against tourists.

Improve infrastructure: India needs to improve its infrastructure, including airports, roads, public transport, and accommodation, to make it easier for tourists to travel around the country. The government can work on improving infrastructure by investing in new facilities and upgrading existing ones.

Promote sustainable tourism: Sustainable tourism practices, such as eco-tourism and responsible tourism, can help attract more tourists to India while also benefiting local communities and preserving the environment. The government can work on promoting sustainable tourism practices by developing eco-tourism destinations, encouraging local communities to participate in tourism activities and adopting sustainable tourism practices.

Develop niche tourism offerings: India has a wealth of unique cultural and natural attractions that can be developed as niche tourism offerings, such as heritage tourism, adventure tourism, and wellness tourism. The government can work on developing these niche tourism offerings by investing in the necessary infrastructure, promoting them through marketing campaigns and collaborating with private sector stakeholders.

Foster partnerships with private sector: The government can foster partnerships with the private sector to promote tourism and develop infrastructure. This can include providing incentives to private sector stakeholders to invest in tourism infrastructure and facilitating public-private partnerships for tourism development.

Leverage technology: Technology can play a significant role in promoting tourism, improving visitor experiences, and managing tourism resources. The government can leverage technology to develop tourism portals, mobile applications, and other digital tools that can help tourists plan their visits and navigate the country.

Collaborate with state governments: Tourism is a state subject in India, and state governments play a significant role in promoting tourism. The central government can collaborate with state governments to develop regional tourism products, improve infrastructure and services, and coordinate marketing and promotional activities.

we can unlock the full potential of India's inbound tourism industry, creating opportunities for growth, employment, and sustainable development. Let us come together to build a brighter future for India's tourism industry.

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