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# HOW TO GROW INBOUND TOURISM IN INDIA:

## UNLOCKING LONG-HAUL OPPORTUNITIES

To unlock its full tourism potential, India must reimagine its image, simplify entry, elevate infrastructure, and craft compelling narratives that captivate long-haul travelers.

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## DISCLAIMER

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## About Rajasthan

Rajasthan stands as one of India's most iconic and culturally vibrant states, attracting millions of travelers from across the globe. It is widely recognized as a leading destination for inbound tourism, thanks to its rich history, architectural grandeur, and unparalleled hospitality. From the pink-hued city of Jaipur and the romantic lakes of Udaipur to the golden dunes of Jaisalmer and the majestic forts of Jodhpur, Rajasthan offers an unforgettable journey through the legacy of India's royal past.

What sets Rajasthan apart is its seamless blend of tradition and luxury. The state is home to some of the most opulent heritage hotels and palace resorts in the world, many of which were once royal residences. These properties offer guests a chance to experience regal living, complete with traditional Rajasthani décor, fine dining, cultural performances, and world-class service. This emphasis on luxury tourism has made Rajasthan a preferred choice for high-end travelers, destination weddings, and heritage lovers seeking authenticity with comfort.

In addition to its architectural wonders and luxury experiences, Rajasthan captivates visitors with its vibrant festivals, folk music and dance, colorful textiles, and intricate handicrafts. Events such as the Pushkar Camel Fair, Desert Festival in Jaisalmer, and the Jaipur Literature Festival provide unique cultural touchpoints that showcase the state's diverse heritage. Adventure seekers can enjoy camel safaris, hot air balloon rides, and wildlife safaris in reserves like Ranthambhore and Sariska.
Whether it's for a deep dive into history, a taste of royal luxury, or an immersive cultural encounter,
Rajasthan offers a travel experience that is as rich and diverse as its landscape.

## About FICCI

Established in 1927, FICCI is the largest and oldest apex business organisation in India. Its history is closely interwoven with India's struggle for independence, its industrialization, and its emergence as one of the most rapidly growing global economies.

A non-government, not-for-profit organisation, FICCI is the voice of India's business and industry. From influencing policy to encouraging debate, engaging with policy makers and civil society, FICCI articulates the views and concerns of industry. It serves its members from the Indian private and public corporate sectors and multinational companies, drawing its strength from diverse regional chambers of commerce and industry across states, reaching out to over 2,50,000 companies.

FICCI provides a platform for networking and consensus building within and across sectors and is the first port of call for Indian industry, policy makers and the international business community.

## About **The Great Indian Travel Bazaar** (GITB)

The Great Indian Travel Bazaar (GITB) is a significant annual event dedicated to positioning India as a leading global tourism destination. Jointly organized by the Rajasthan Tourism Department and the Federation of Indian Chambers of Commerce and Industry (FICCI), GITB serves as a dynamic platform where travel and tourism professionals gather to highlight the diverse attractions of India. From Rajasthan's grand forts and palaces to the tranquil backwaters of Kerala, the event captures the essence of India's rich cultural and natural heritage.

GITB has been held for 13 yrs at Jaipur, Rajasthan since its inception in 2008. GITB not only showcases the country's varied tourism offerings but also fosters valuable networking and business opportunities for stakeholders across the travel and tourism industry. It plays a pivotal role in strengthening inbound tourism by connecting international tour operators with State Tourism boards and exhibitors from across the tourism industry. The event covers a wide range of tourism segments including leisure, cultural, adventure, luxury, MICE (Meetings, Incentives, Conferences, and Exhibitions), wildlife, safaris, and Ayurveda.

Featuring pre-scheduled B2B meetings, exhibitions, seminars, and cultural programs, GITB hosts over 11,000 structured face-to-face business interactions during its two-day run. These engagements significantly contribute to business development and the overall growth of India's tourism sector.

## AUDIENCE

This report is designed for travel industry professionals, policymakers, tourism boards, hospitality executives, airlines, and marketing strategists focused on growing inbound tourism in India. It provides actionable insights for stakeholders looking to attract long-haul travelers, enhance India's global competitiveness, and overcome barriers preventing foreign tourist arrivals.

## SKIFT TAKE

Despite India's strong global appeal, inbound tourism lags behind its booming domestic and outbound travel markets. To bridge this gap, India must address perception challenges, improve infrastructure, streamline visa policies, and refine its marketing strategies to attract high-value travelers.

# EXECUTIVE SUMMARY

India's travel industry is a study in contrasts. While domestic and outbound travel have surged past pre-pandemic levels, inbound tourism continues to lag, struggling to match the rapid growth of other segments. Despite its cultural richness, diverse landscapes, and global visibility, India remains underpenetrated in long-haul tourism. This report delves into the factors limiting inbound travel and outlines actionable strategies to unlock India's potential as a global travel destination.

The data reveal that India faces key perception challenges. While travelers associate India with iconic landmarks, rich heritage, and culinary excellence, concerns around safety, infrastructure, and accessibility continue to deter potential visitors. Our survey across the U.S. and the UK — two of India's largest long-haul source markets — identifies a significant gap in traveler intent, with 63% of non-travelers indicating that India is not currently on their travel radar — signaling a valuable opportunity to elevate the country's visibility and appeal among long-haul audiences. Addressing this perception issue is critical to positioning India as a must-visit location for global travelers.

Visa policies and ease of entry remain crucial factors shaping traveler decisions. Although India has made strides with e-visas, awareness and accessibility remain roadblocks, with 15% of non-travelers citing visa requirements as a deterrent. Global benchmarks show that streamlining visa policies and promoting hassle-free entry can significantly boost arrivals. Countries such as Thailand and Japan have successfully leveraged visa relaxation policies to drive inbound growth — India can benefit from similar strategic interventions.

Infrastructure and cleanliness concerns further affect India's competitiveness. Compared to regional rivals, India scores lower on perceived hygiene, urban planning, and ease of transport. Our India Travel Perception Index (ITPI) highlights cleanliness (2.3/5) and safety (2.6/5) as the lowest-rated factors. Enhancing urban infrastructure, improving public amenities, and reinforcing destination safety narratives can counteract these challenges and elevate India's global appeal.

Digital discovery is reshaping traveler decision-making. Social media plays an outsized role in inspiring and influencing trips, with 40% of travelers relying on platforms such as YouTube, Instagram, and TikTok for travel research. However, India's digital marketing efforts remain fragmented. A targeted, data-driven approach — akin to the 'Inspired by Iceland' campaign — can help reposition India as a premier long-haul destination. Leveraging influencer partnerships, AI-driven personalization, and immersive content can amplify India's brand presence.

Cultural and culinary tourism present India's strongest growth opportunities. With 59% of surveyed travelers identifying cultural experiences as a primary motivator and 56% drawn to Indian cuisine, these segments hold immense revenue potential. We calculated the average per-traveler spend on these experiences and visualized it using a bubble chart, revealing that high per-traveler spending does not always translate to the highest revenue.

For example, luxury travelers spend the most per person, yet cultural tourism generates higher overall revenue due to its broader traveler base. Similarly, culinary tourism attracts significant interest and spending but requires strategic marketing to maximize its economic impact. Enhancing storytelling, developing structured heritage circuits, and leveraging social-media-driven food tourism campaigns can strengthen India's positioning in these high-demand categories. Additionally, India's strengths in wellness, adventure, and luxury travel provide further avenues for growth, if marketed effectively.

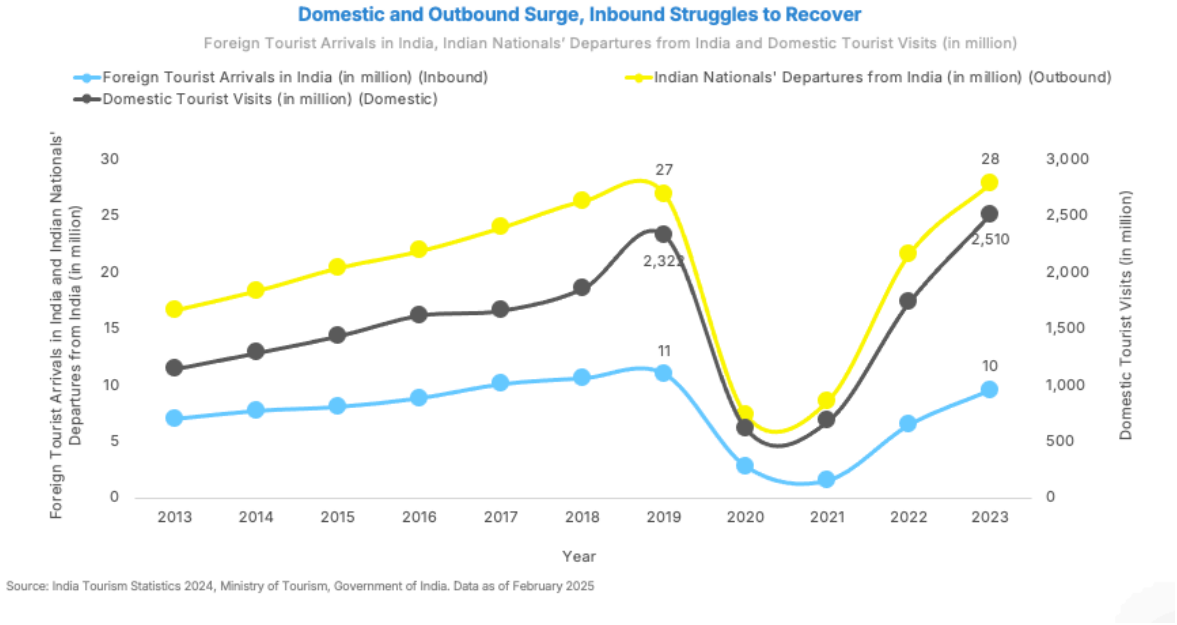
The economic case for investing in inbound tourism is compelling. If India successfully aligns its marketing, infrastructure, and policy efforts, it stands to unlock billions in additional tourism revenue. Cultural tourism alone holds an estimated spending potential of $22 billion, while culinary tourism could generate $21 billion. By multiplying the estimated number of travelers in each category by their respective average spending per trip, we calculated the total revenue potential of these travel segments. It is important to note that these figures represent overlapping categories rather than the total inbound tourism spend, as many travelers engage in multiple experiences during their visit. By addressing barriers and capitalizing on demand-driven strategies, India can significantly enhance its share of global tourism expenditure.

This report outlines a multi-pronged roadmap to drive inbound tourism growth. Short-term interventions — such as safety perception campaigns, enhanced visa processing, and infrastructure improvements — must be complemented by long-term investments in branding, aviation connectivity, and sustainable tourism. Engaging the Indian diaspora, expanding niche tourism offerings, and developing seamless booking experiences will further support India's journey to becoming a top-tier global travel destination. With the right strategic interventions, India has the potential to position itself as an unmissable destination for long-haul travelers worldwide.

# INTRODUCTION

## INDIA'S TRAVEL PARADOX: BOOMING OUTBOUND AND DOMESTIC TOURISM, YET INBOUND STRUGGLES

India's travel landscape tells a story of two strikingly different trajectories. On one hand, domestic and outbound travel have surged, surpassing pre-pandemic levels and reaffirming India's position as a global travel powerhouse. On the other hand, inbound tourism presents a promising growth opportunity, with significant room to rebound and surpass pre-pandemic levels.



Source: India Tourism Statistics 2024, Ministry of Tourism, Government of India. Data as of February 2025

Over the past decade, India witnessed a steady rise in travel across all segments. Foreign tourist arrivals grew from 7 million in 2013 to 11 million in 2019, reflecting a steady increase in global interest. Outbound travel expanded even more rapidly, with the number of Indian nationals traveling abroad rising from 17 million to 27 million over the same period. Yet, it was domestic tourism that saw the most staggering growth — more than doubling from 1 billion visits in 2013 to 2 billion in 2019, underscoring the increasing mobility and spending power of Indian travelers within the country.

The COVID-19 pandemic brought this momentum to a screeching halt. In 2020, foreign tourist arrivals collapsed to just 3 million, while outbound travel shrank to 7 million, and domestic trips plummeted to 610 million. The industry faced an unprecedented crisis, with India's global travel aspirations momentarily put on hold.

By 2023, the resilience of India's domestic and outbound travel segments was on full display. Outbound tourism rebounded strongly, reaching 28 million departures, surpassing pre-pandemic levels at 104% of 2019 figures. Domestic tourism, too, surged past its previous peak, recording 2.5 billion visits — an 8% increase over 2019. These numbers reflect the country's growing

economic confidence, expanding middle class, and an increasing appetite for both local and international travel.

However, the recovery of foreign tourist arrivals has been far less impressive. At 10 million in 2023, inbound tourism is still at 87% of pre-pandemic levels, trailing behind other travel segments. Despite India's rich cultural heritage, diverse landscapes, and growing global visibility, it continues to struggle in attracting international visitors at the same pace as its regional competitors.

This uneven recovery raises pressing questions — why is India failing to bring back foreign tourists at the same pace as it is sending travelers abroad? What barriers are preventing a full-scale revival of inbound tourism? And most importantly, what can be done to bridge this gap? This report highlights both short-term fixes and longer-term strategies, addressing a range of hurdles — from safety concerns and cumbersome visa processes to information gaps and subpar public facilities — and charts a comprehensive roadmap that leverages targeted marketing, infrastructure improvements, and innovative digital initiatives to transform India's inbound tourism landscape and secure its position as a premier global destination.

## HOW DID WE GO ABOUT IT?

To uncover the reasons behind India's inbound tourism struggles, we conducted a survey in two of India's largest source markets: the U.S. and the UK. Together, these English-speaking nations accounted for 27% of foreign tourist arrivals in 2023.

The survey followed distinct question paths based on respondents' travel intentions. Those who answered "No" to the question, "Do you plan to visit India in the next 12 months?", were categorized as non-travelers, while those who answered "Yes" were classified as potential visitors. We gathered responses from 300 non-travelers and 500 travelers in each country, ensuring a diverse and representative sample.

Conducted online in February 2025 through a trusted third-party consumer panel provider, the survey captured insights across different age groups, genders, and income levels. Our focus was to decode the key motivators, deterrents, and perceptions shaping India's appeal — or lack thereof — as a travel destination.

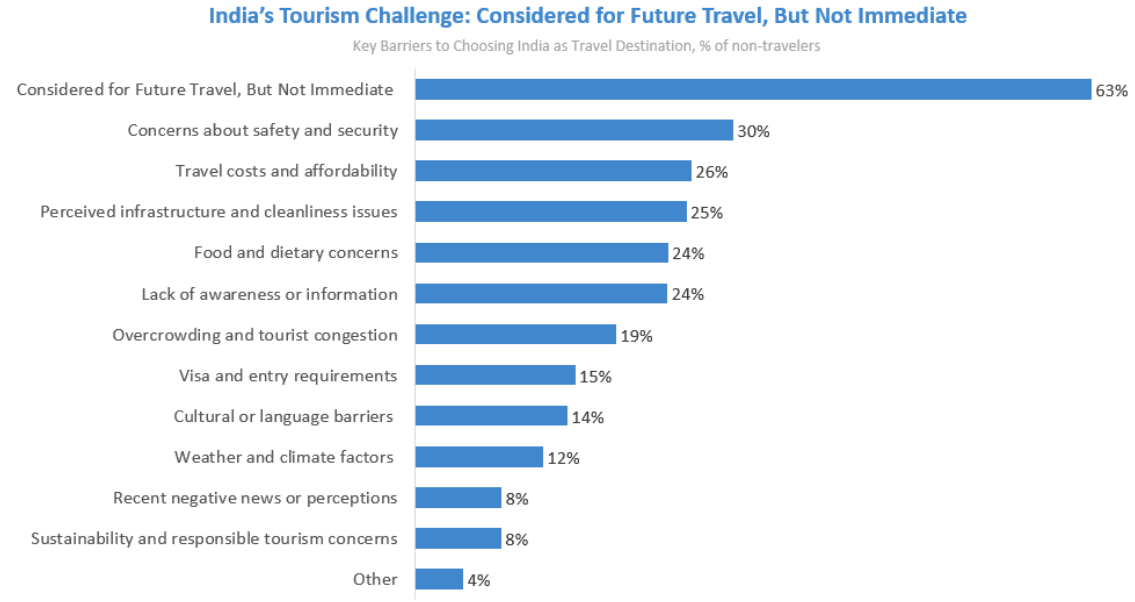
Beyond traveler sentiment, the survey explored factors such as visa policies, safety concerns, and awareness of India's tourism campaigns, offering a data-driven perspective on the barriers preventing inbound travel from bouncing back.

# THE ISSUE: UNDERSTANDING THE BARRIERS TO INBOUND TOURISM

The survey data highlight key barriers that deter travelers from considering India in their travel plans for the next 12 months.

## KEY BARRIERS TO CHOOSING INDIA AS A TRAVEL DESTINATION

Among non-travelers, 63% indicated that India is not currently a top priority for their upcoming trips. Rather than signaling disinterest, this highlights an opportunity to elevate India's visibility and relevance in global travel planning. With its rich cultural assets and diverse experiences, India stands to benefit from more focused branding and tailored outreach efforts that bring its unique offerings to the forefront.



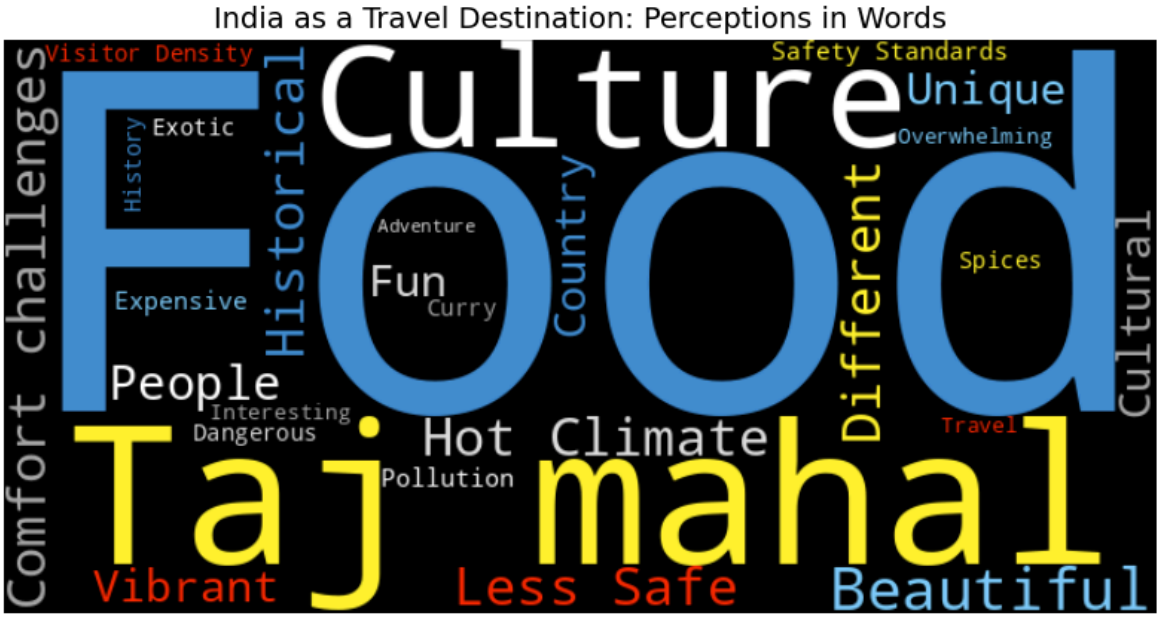

In addition to awareness-building, some travelers expressed specific concerns, including safety and security (30%), travel costs (26%), and perceptions around infrastructure and cleanliness (25%). These perceptions — while not universally held — point to areas where clear communication, destination management, and traveler education can play a transformative role. For example, safety concerns are more prominent among solo travelers and those less familiar with India's vast geography and regional nuances. Similarly, ongoing improvements in infrastructure and sanitation can directly enhance India's appeal and competitiveness.

Other considerations include dietary needs and food safety (24%), limited awareness of destination options (24%), and concerns about overcrowding (19%). Visa and entry processes also play a role, with 15% citing them as a deterrent — suggesting that streamlining procedures and enhancing visibility of e-visa options could further increase accessibility and traveler confidence.

## SENTIMENT ANALYSIS: HOW NON-TRAVELERS PERCEIVE INDIA

A sentiment analysis of non-travelers' perceptions offers valuable insight into how India is viewed by those who have not yet experienced it firsthand. When asked, "What are the first three words or phrases that come to mind when you think of India as a travel destination?", the most frequently mentioned words were: Taj Mahal, culture, and food. However, some respondents also cited concerns about overcrowding and cleanliness in urban or high-traffic areas, pointing to challenges related to hygiene and infrastructure in certain tourist zones.

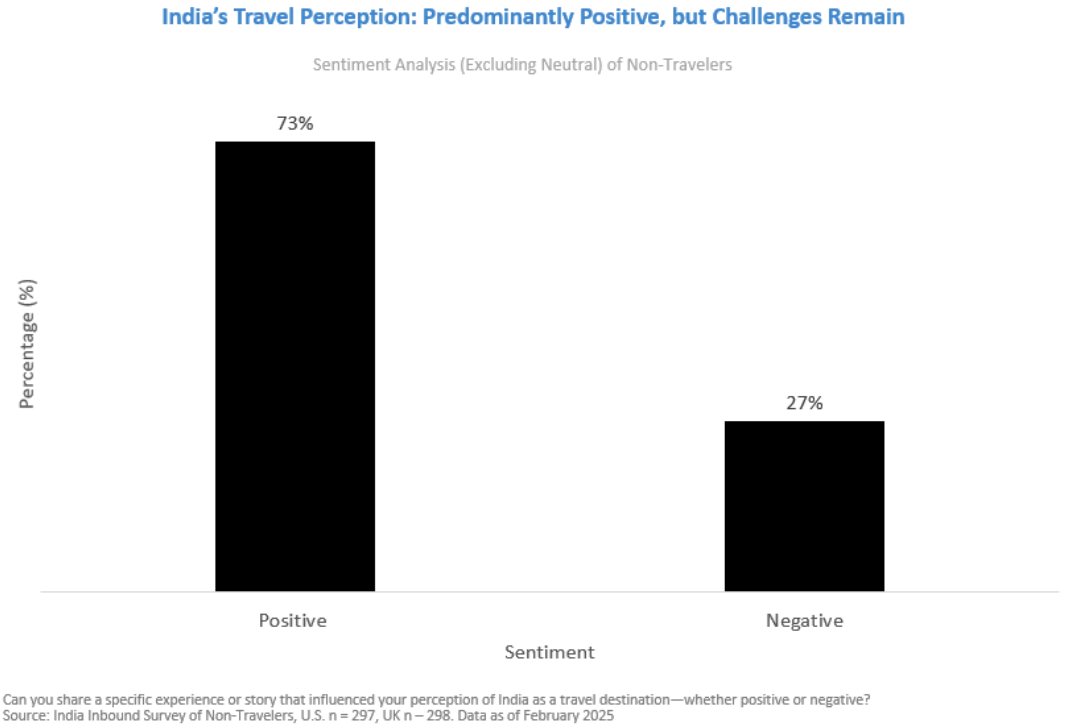
While many respondents associated India with positive attributes — such as beautiful, historical, unique, vibrant, and exotic — others mentioned terms like hot, perceived as less safe, overwhelming, and challenging in terms of comfort, reflecting common pre-travel concerns, particularly for first-time or solo travelers.




To gain deeper insights, we analyzed responses to the question: "Can you share a specific experience or story that influenced your perception of India as a travel destination — whether positive or negative?".

Using Vader and TextBlob, two widely used sentiment-analysis models, we examined the polarity of responses. The findings revealed that while most non-travelers expressed admiration for India's cultural richness and historical significance, 27% of responses carried a negative

sentiment. Commonly mentioned concerns included the density of tourist areas, environmental conditions, and personal safety expectations — all of which shape perceptions and influence travel decisions.

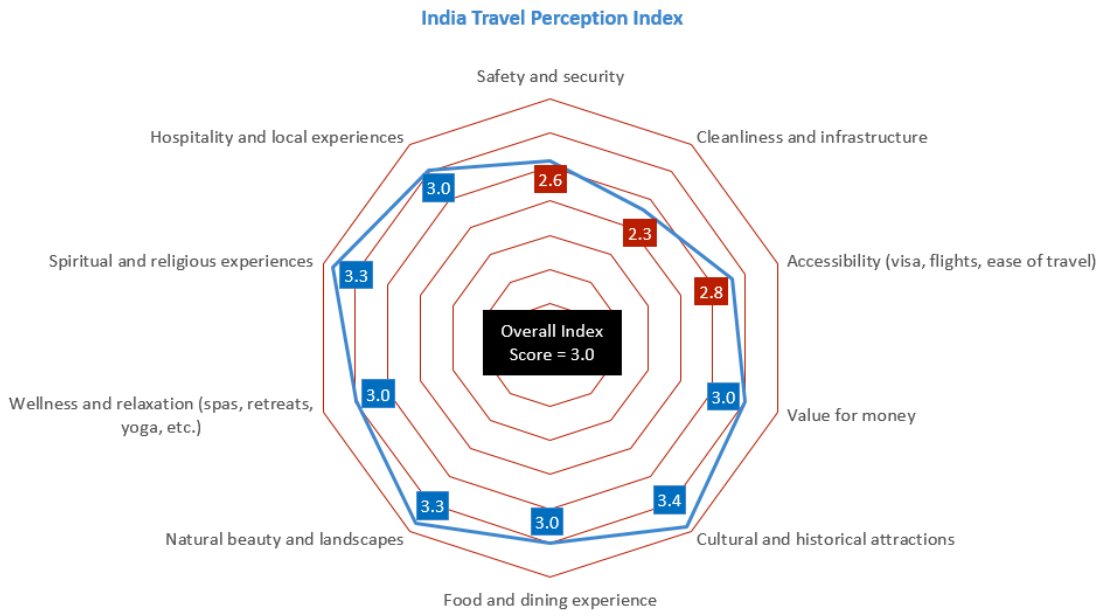



## ASSESSING INDIA'S COMPETITIVE POSITION: SKIFT'S INDIA TRAVEL PERCEPTION INDEX

To better understand India's position relative to competing destinations in Asia, Skift's India Travel Perception Index (ITPI) evaluates traveler sentiment across 10 key factors on a scale of 1 to 5.

The ITPI is a proprietary Skift index, derived from survey responses, that measures how travelers perceive India compared to other Asian destinations. Ratings range from 1 (much worse) to 5 (much better) across various travel-related parameters, providing a data-driven perspective on India's competitive standing.

Each parameter — such as safety, cleanliness, accessibility, and value for money — is assigned a weighted average score based on traveler feedback. These scores are then plotted on a radar chart, offering a visual representation of India's perceived strengths and weaknesses as a travel destination.




Compared to other destinations in Asia, how do you perceive India in terms of: (Rate on a scale from 1–5, where 1 = much worse, 5 = much better)Note: The India Travel Perception Index (ITPI) is a composite score that reflects how travelers perceive India compared to other destinations in Asia. It is derived from survey responses across key travel-related parameters, rated on a scale of 1 to 5 (where 1 = Much Worse and 5 = Much Better).
Source: India Inbound Survey of Non-Travelers, U.S. n = 297, UK n – 298. Data as of February 2025

The findings reveal that India is highly regarded for its cultural and historical attractions, scoring 3.4, followed closely by natural beauty (3.3) and spiritual and religious experiences (3.3). Food and dining experiences also resonate well, with a rating of 3.0, reinforcing India's appeal as a destination rich in cultural exploration and unique experiences.

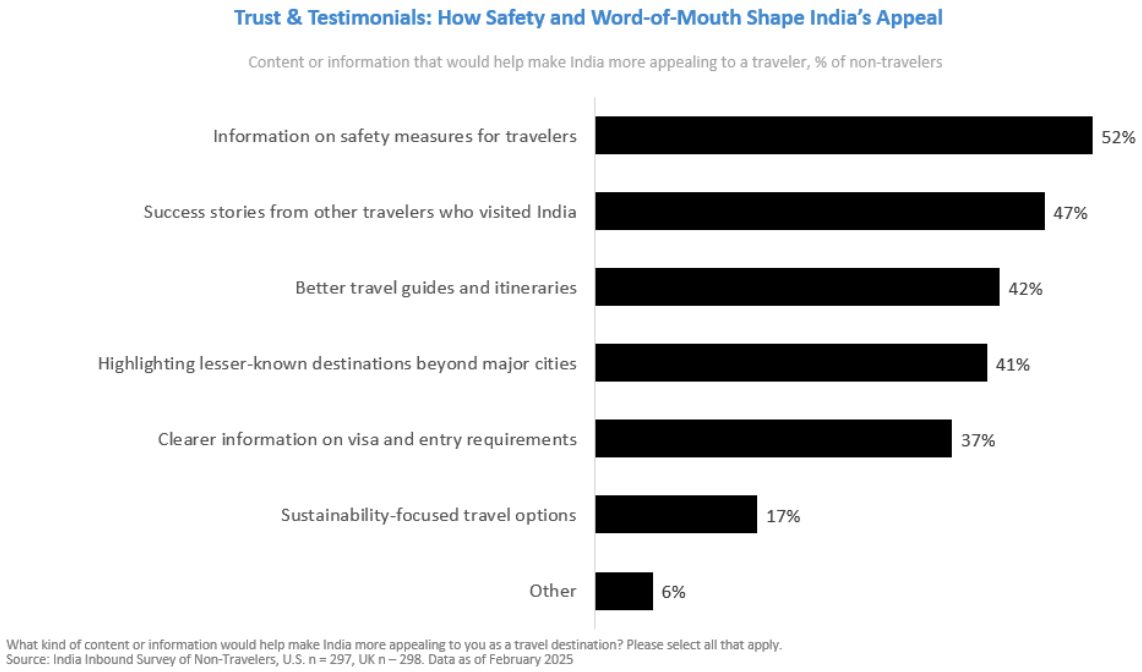
Opportunities for growth lie in hospitality and wellness tourism, both rated at 3.0. Given India's deep-rooted heritage in Ayurveda, yoga, and wellness retreats, further investment in these sectors could strengthen its position as a premier destination for holistic and luxury travel.

However, challenges persist, particularly in perceptions of cleanliness and infrastructure, which score the lowest at 2.3, followed by safety and security at 2.6. Accessibility, including ease of obtaining visas and flight connectivity, also lags at 2.8, indicating areas where improvements could enhance India's competitiveness as a seamless travel destination.

These insights underscore a dual challenge for India's tourism industry: addressing negative perceptions while amplifying its strengths. Strategic messaging around safety, improved infrastructure, and sustainability initiatives could help counter misperceptions and increase India's appeal among hesitant travelers. At the same time, India's strong reputation in cultural tourism, food experiences, and wellness travel presents opportunities to attract niche travel segments.

Policy interventions such as simplifying visa processes and enhancing urban cleanliness initiatives could further improve India's appeal, making it a more seamless and inviting destination. Coupled with strategic marketing efforts that highlight India's affordability, diversity, and immersive travel experiences, these measures could help convert interest into actual visitation.

# WHAT WOULD MAKE INDIA MORE APPEALING TO TRAVELERS?




When asked what would make India a more attractive destination, 52% of travelers emphasized the need for clearer safety information, while 47% valued hearing success stories from fellow travelers. Additionally, 42% sought better travel guides and itineraries to facilitate trip planning. Interest in exploring beyond major cities was also evident, with 41% expressing a desire for more information on lesser-known destinations. Clarity on visa and entry requirements was another key factor, with 37% of respondents highlighting the need for accessible and transparent information. While sustainability-focused travel options were of interest to a smaller segment (17%), they still play a role in shaping perceptions.

By addressing these concerns — particularly around safety, accessibility, and hidden gems — India can strengthen its global appeal and position itself as a more attractive travel destination.

# THE TRAVELER: WHO VISITS INDIA AND WHAT DO THEY SEEK?

To effectively market India as a travel destination and address the barriers identified, it is crucial to understand the mindset of those who are considering a visit. How do international travelers research and book their trips? What experiences do they seek? By analyzing traveler behavior, preferences, and decision-making patterns, we can uncover actionable strategies to make India a more compelling and competitive destination.

## WHY TRAVELERS CHOOSE INDIA




What are the top reasons you chose India over other destinations? Please select all that apply.
Source: India Inbound Survey of Travelers, U.S. n = 508, UK n = 493. Data as of February 2025

According to survey responses, the top reason travelers choose India over other destinations is its rich cultural heritage and historical landmarks, with 71% of respondents selecting it as a key motivator. From iconic monuments such as the Taj Mahal to centuries-old traditions and vibrant local customs, India's deep-rooted history remains a powerful draw.

Beyond its cultural appeal, India's diverse landscapes captivate travelers. From the majestic Himalayas to pristine beaches and lush forests, the country's natural beauty attracts 53% of visitors. Similarly, 51% are drawn to unique and authentic experiences, including immersive local traditions and offbeat travel opportunities.

Affordability (41%) also plays a crucial role, as India offers a wide spectrum of budget-friendly to luxury experiences. Culinary tourism (40%) is another strong motivator, with travelers eager to explore India's diverse street food, regional delicacies, and fine dining options. Meanwhile, the country's reputation as a global wellness hub, known for Ayurveda, yoga, and meditation retreats, continues to influence 25% of visitors.

Spiritual and religious tourism (27%), live events and festivals (21%), and personal or family connections (20%) also play key roles in bringing travelers to India. Additionally, 15% visit for business and work opportunities, highlighting India's growing appeal as an economic and corporate hub.

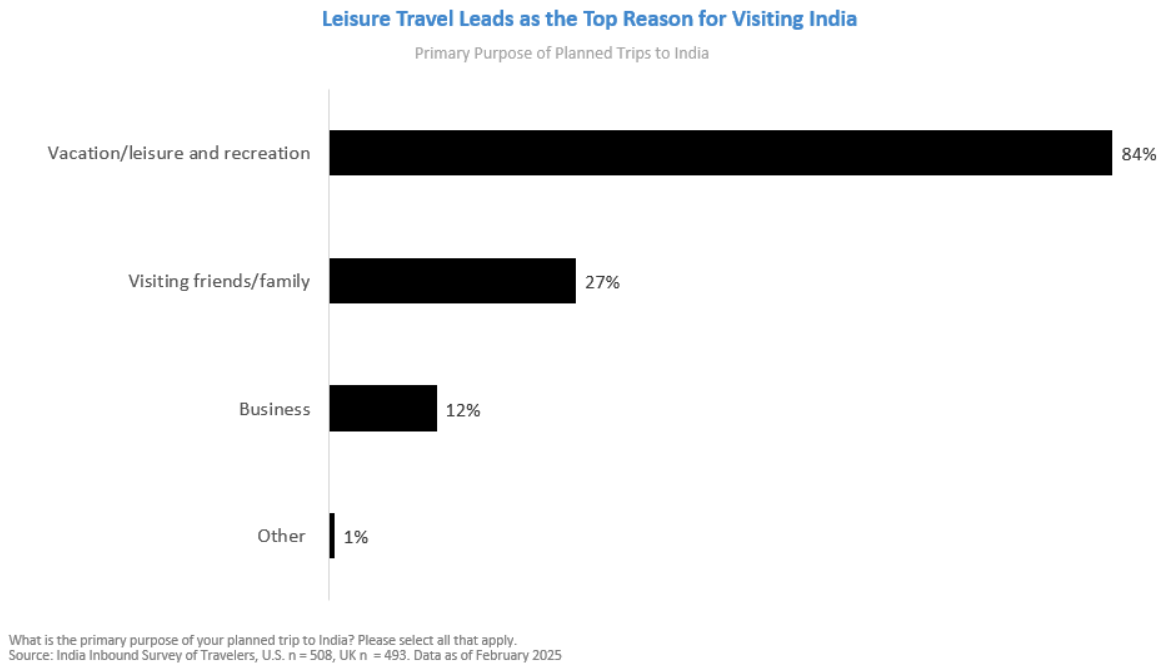
These motivations translate into specific experiences that travelers eagerly anticipate before arrival. When asked which experiences they are most excited about in India, travelers highlighted three key aspects. Trying Indian street food and local eateries (52%) topped the list, showcasing a strong enthusiasm for India's diverse and flavorful cuisine. Close behind, engaging in local cultural experiences (50%), such as crafts, music, and performances, reflects a desire for deeper cultural immersion. Additionally, exploring historical sites and UNESCO heritage landmarks (48%) remains a major draw, emphasizing India's rich heritage and architectural marvels. These preferences highlight the appeal of India's food, culture, and history, making it a compelling destination for global travelers.

## TRAVELER PROFILES: UNDERSTANDING PRIMARY TRAVEL STYLES

### TRIP PURPOSE AND TRAVEL MOTIVATIONS

The primary purpose of travel to India skews overwhelmingly toward leisure, with 84% of respondents indicating vacation and recreation as their main reason for visiting. This underscores India's appeal as a diverse and experiential destination, attracting travelers seeking cultural immersion, relaxation, and exploration.

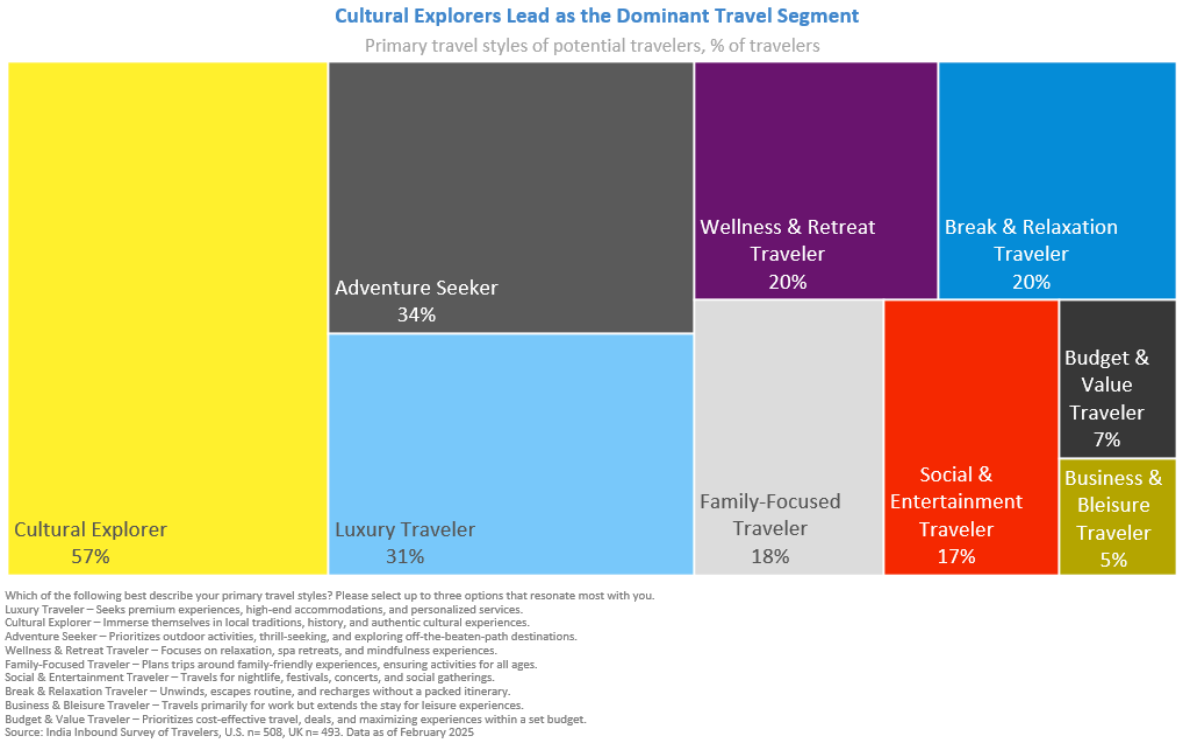
Beyond leisure, 27% of travelers are visiting friends and family, reinforcing the strong role of diaspora connections and personal ties in driving inbound travel. Business travel accounts for 12% of respondents, while a small fraction (1%) cite other motivations, such as educational pursuits or special interest travel.




These varied purposes set the stage for the diverse psychographic profiles of travelers. While leisure dominates, many visitors balance multiple motivations — combining business with personal exploration or blending family reunions with cultural experiences. This fluidity in travel intent highlights the need for travel brands to cater to multifaceted traveler expectations, offering tailored experiences that align with both planned and spontaneous trip elements.

## PSYCHOGRAPHIC ANALYSIS

Our psychographic analysis of traveler preferences reveals distinct behavioral patterns shaping travel decisions. Rather than being confined to a single category, travelers identify with multiple styles, reflecting the diverse motivations influencing their trips.




The most prevalent travel style among those visiting India is the Cultural Explorer, with 57% of respondents prioritizing immersive experiences rooted in local traditions, history, and authenticity. This signals a clear shift toward meaningful engagement rather than passive tourism. Following closely, 34% of travelers identify as Adventure Seekers, drawn to thrill-seeking and off-the-beaten-path exploration, while 31% gravitate toward Luxury Travel, valuing premium accommodations and personalized services. These overlapping preferences indicate that while some travelers seek exclusivity, others crave adventure — two contrasting yet complementary psychographic profiles.

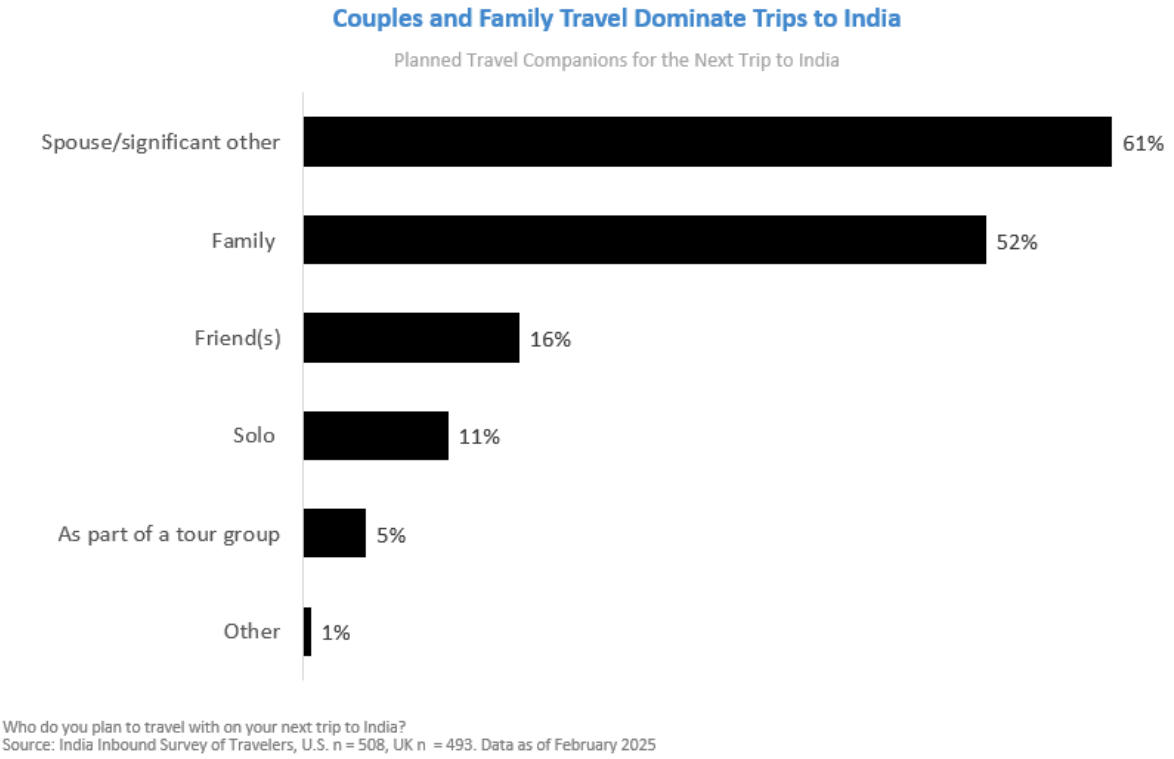
Relaxation and wellness also emerge as key priorities, with 20% of travelers identifying with the Break and Relaxation category, and another 20% with Wellness and Retreat travel. Together, these segments highlight the growing demand for stress-free, rejuvenating experiences, such as spa retreats, mindfulness travel, and slow tourism. Meanwhile, Family-Focused Travelers (18%) and Social and Entertainment Travelers (17%) represent a smaller but notable share, emphasizing that while shared experiences remain relevant, personal enrichment tends to take precedence.

Interestingly, Budget and Value Travelers make up only 7% of respondents, suggesting that while cost-consciousness plays a role, most travelers prioritize experience over price. Similarly, Business and Bleisure Travelers account for just 5%, reinforcing that while work-leisure travel exists, it is not a primary driver for most.

Since respondents could select multiple styles, these categories do not add up to 100%, further underscoring the fluid nature of modern travel behavior. Travelers today seek a mix of cultural immersion, adventure, relaxation, and indulgence, rather than fitting neatly into a single persona. For travel brands, this presents a unique opportunity to design offerings that cater to layered and evolving preferences, where authenticity, premium experiences, and well-being remain central to the traveler's journey.

## TRAVEL COMPANIONS

Travel companionship plays a crucial role in shaping trip experiences, influencing everything from destination choices to accommodation preferences.




Who do you plan to travel with on your next trip to India?
Source: India Inbound Survey of Travelers, U.S. n = 508, UK n = 493. Data as of February 2025

Our data suggest that the majority of travelers prefer shared experiences over solo travel, with 61% planning to visit India with a spouse or significant other. This highlights the strong appeal of India as a romantic or couple-friendly destination, where cultural exploration, wellness retreats, and luxury getaways align with the preferences of those traveling with a partner.

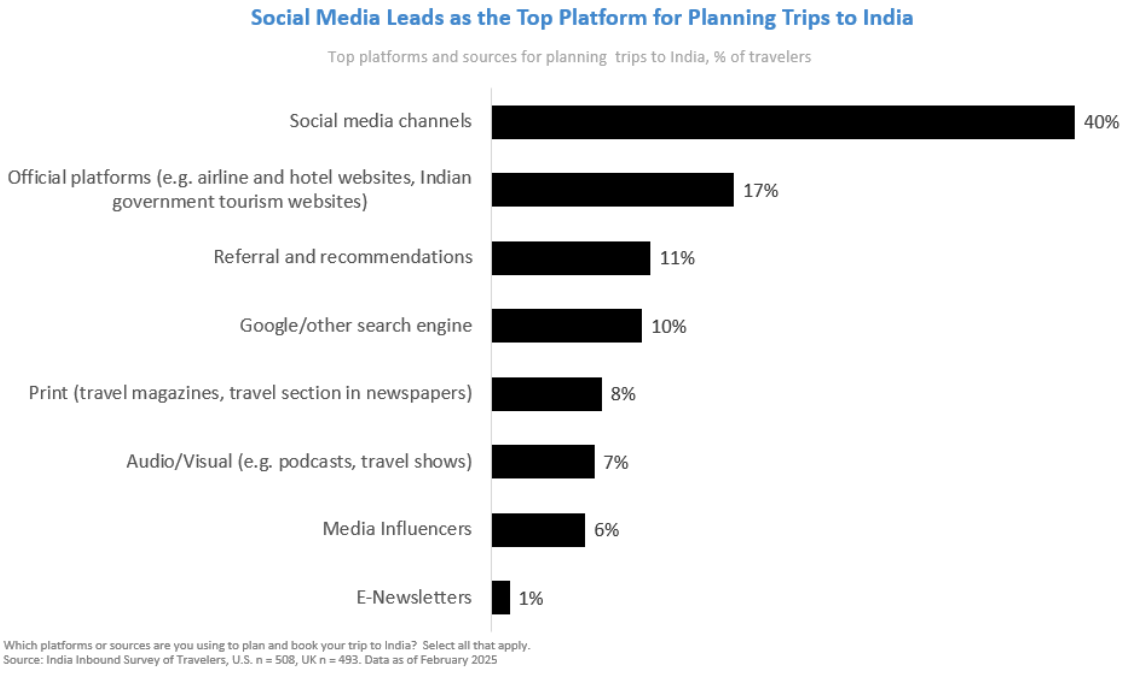
Family travel is also a significant driver, with 52% of respondents indicating they will be accompanied by family members. This aligns with the growing trend of multi-generational travel, where families seek destinations that offer a blend of adventure, heritage, and relaxation. Notably, 16% of travelers plan to visit with friends, reinforcing the idea that India's appeal extends beyond traditional family or couple vacations to include social and group-oriented travel experiences.

Solo travel remains a niche but noteworthy category, with 11% of respondents indicating they will be traveling alone. While this segment is smaller, it reflects the increasing confidence in India as a destination for independent travelers seeking cultural immersion and personal exploration. In contrast, only 5% plan to visit as part of a tour group, suggesting that most travelers prefer customized or self-guided experiences over structured itineraries.

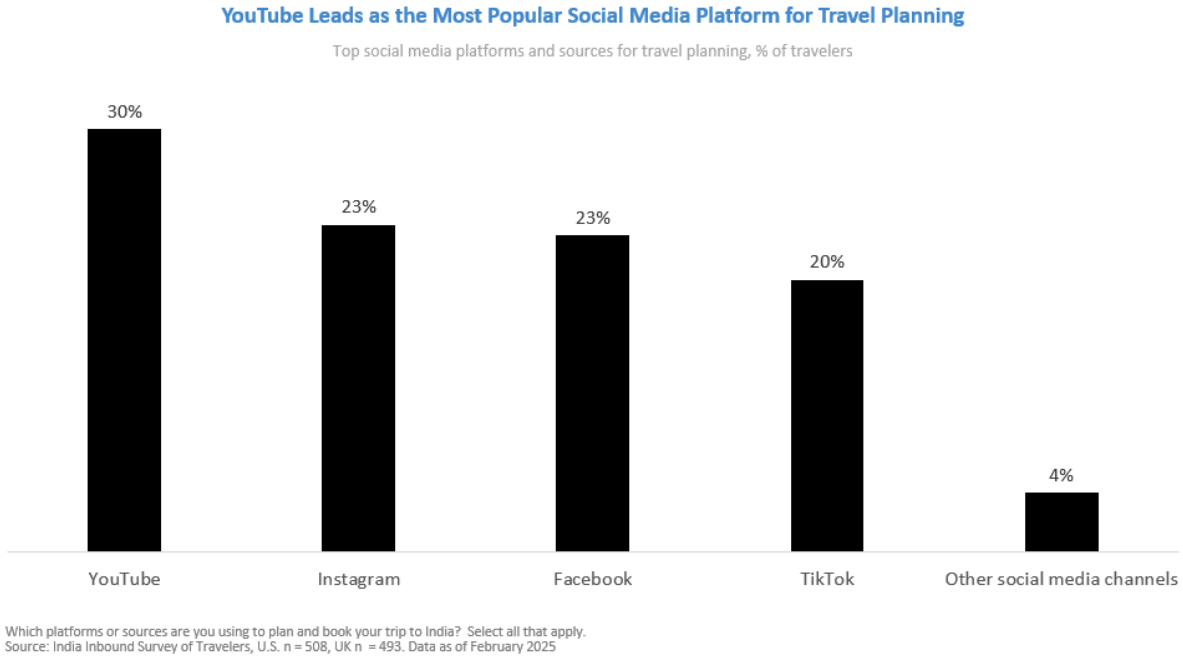
Together, these insights reveal a travel landscape shaped by multiple motivations, overlapping psychographics, and diverse companionship preferences, offering significant opportunities for the travel industry to curate personalized and experience-driven offerings.

## WHERE DOES RESEARCH BEGIN?

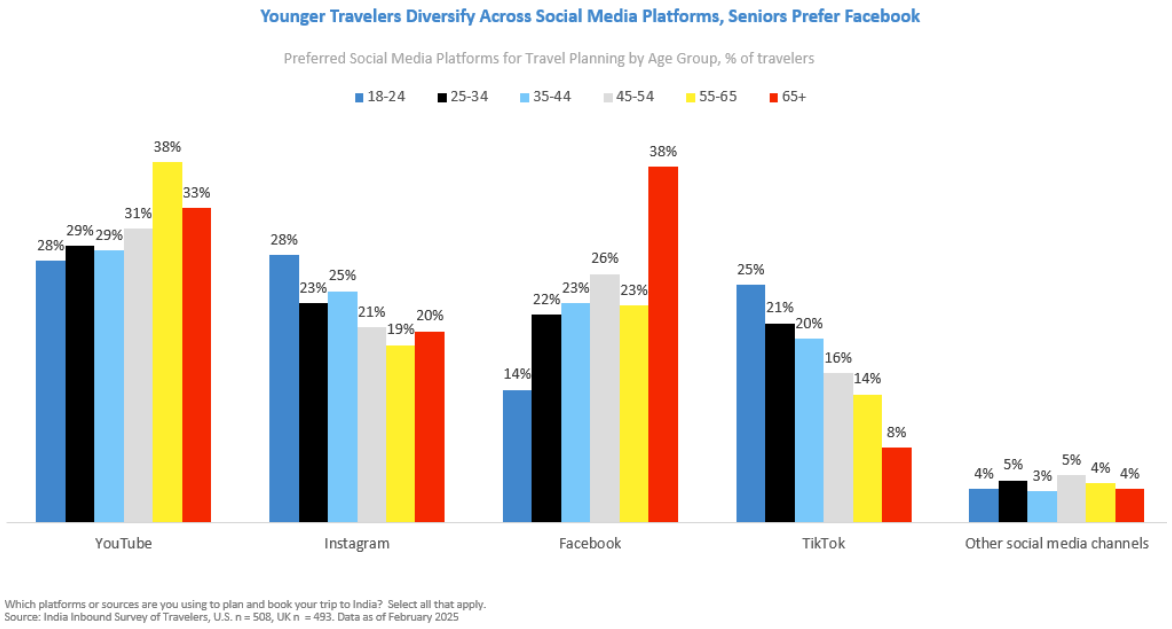
Travel planning has evolved significantly, with digital platforms, personal recommendations, and official sources shaping the decision-making process. When researching their trips to India, travelers rely on a diverse mix of information channels, reflecting the growing influence of online content, peer recommendations, and trusted travel resources.




Social media leads the way, with 40% of travelers turning to platforms such as YouTube, Instagram, and TikTok for inspiration and trip planning. Official websites, including airline and hotel pages, as well as Indian government tourism portals, play a crucial role, influencing 17% of travelers. Meanwhile, word-of-mouth remains relevant, with 11% relying on referrals and recommendations. Search engines such as Google account for 10%, while traditional travel publications—print magazines and newspaper travel sections—still attract 8% of travelers. Podcasts and travel shows contribute to 7% of research, whereas media influencers hold sway over 6% of respondents. E-newsletters, though present, remain the least-used resource at just 1%.




With 40% of travelers relying on social media to plan their trips, its impact on travel decisions cannot be overlooked. YouTube emerges as the top research tool, with 30% of respondents watching travel vlogs, itinerary guides, and destination reviews. Instagram and Facebook are equally influential, each attracting 23% of travelers who seek inspiration through posts, stories, and community discussions. TikTok, with its bite-sized, visually engaging travel content, appeals to 20% of respondents. Other social media platforms collectively account for 4%, reinforcing the dominance of visual and interactive content in shaping travel choices.




Social media habits vary across age groups, shaping how different generations approach travel planning. YouTube enjoys widespread appeal, with usage gradually increasing among older

travelers. While 28–29% of younger respondents aged 18–44 use it, the percentage rises to 38% among those aged 55–65 and remains high at 33% for the 65+ group. Instagram finds stronger traction among younger travelers, peaking at 28% for the 18–24 segment before gradually declining to 19% among 55–65-year-olds. Facebook, on the other hand, is far more popular among older travelers, growing from 14% usage among 18–24-year-olds to 38% for those 65 and older. TikTok remains a platform for younger audiences, with 25% of 18–24-year-olds using it, but its popularity drops sharply with age, reaching only 8% in the 65+ category. Other social media platforms show relatively stable but lower engagement, with usage ranging between 3% and 5% across all age groups.

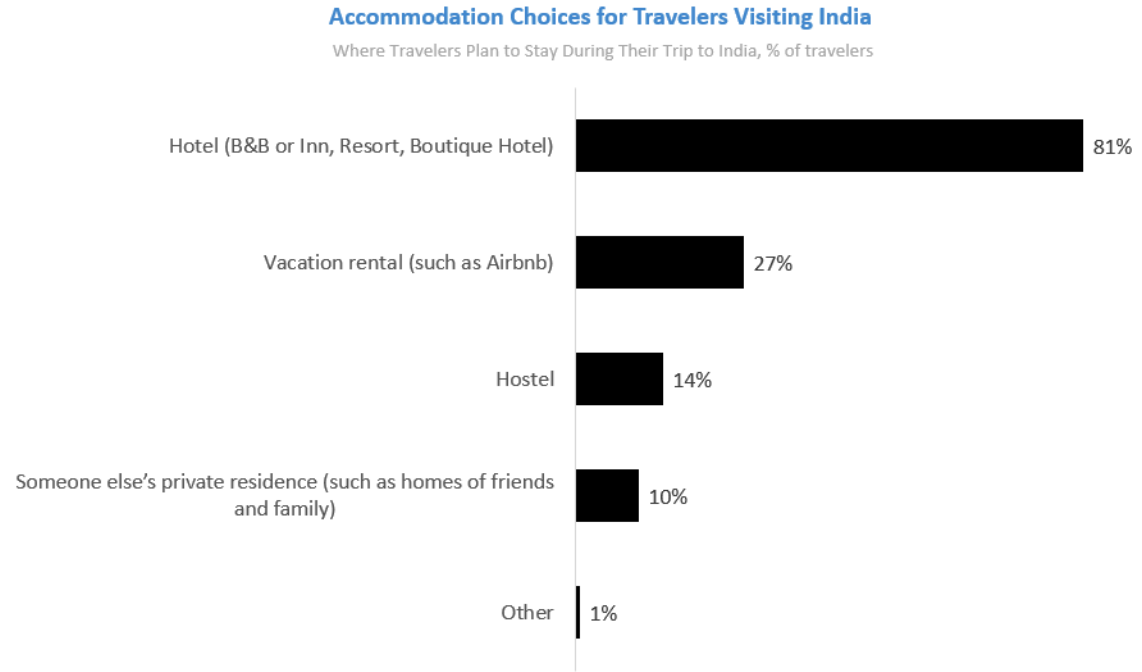
As digital research behaviors evolve, brands and tourism stakeholders must leverage a mix of official resources, social platforms, and influencer partnerships to meet travelers where they seek inspiration and information.

## HOW AND WHAT DO THEY BOOK?

### *Accommodations*

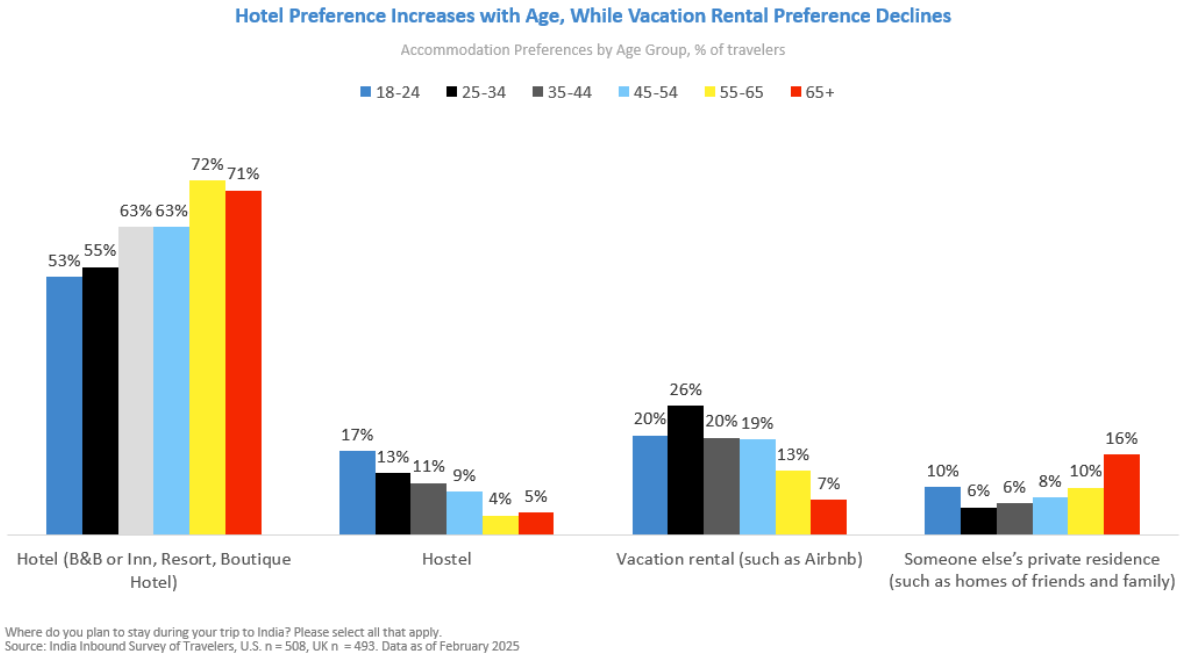
Hotels, including B&Bs, inns, resorts, and boutique hotels, are the preferred choice for the majority (81%) of travelers visiting India. Vacation rentals (27%) and hostels (14%) follow at a distant second and third. Staying with friends and family is the least common option at just 10%

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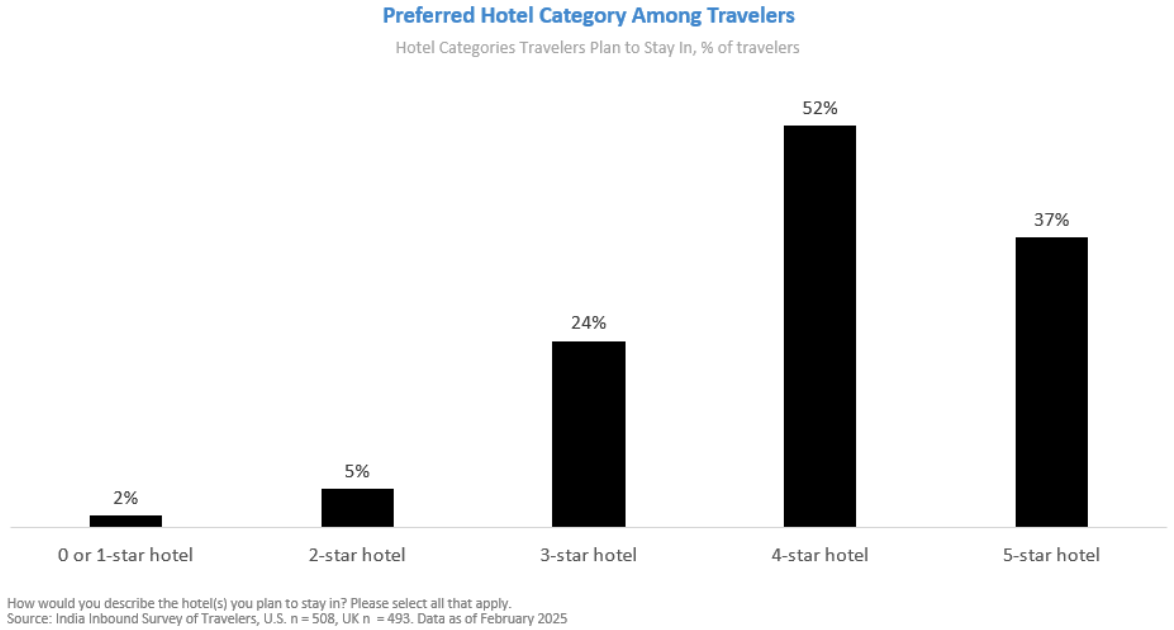



Where do you plan to stay during your trip to India? Please select all that apply.
Source: India Inbound Survey of Travelers, U.S. n = 508, UK n = 493. Data as of February 2025

Hotel stays increase with age, with 53% of 18–24-year-olds choosing hotels compared to 72% of those aged 55–65. In contrast, younger travelers (17% of 18–24-year-olds) are more likely to opt for hostels, while vacation rentals see the highest preference among 25–34-year-olds at 26%.




Mid- to high-end hotels dominate the preference list, with 52% choosing 4-star properties and 37% opting for 5-star hotels. Budget accommodations (0–2 stars) make up just 7% of choices.




For context, Hotelivate's 2024 Indian Hospitality Trends and Opportunities report states that the branded and organized hotel sector in India closed 2023/24 with a nationwide ADR of ₹8,055 (~$93), the highest ever recorded. However, this figure represents an overall market average, factoring in budget and mid-range hotels as well.

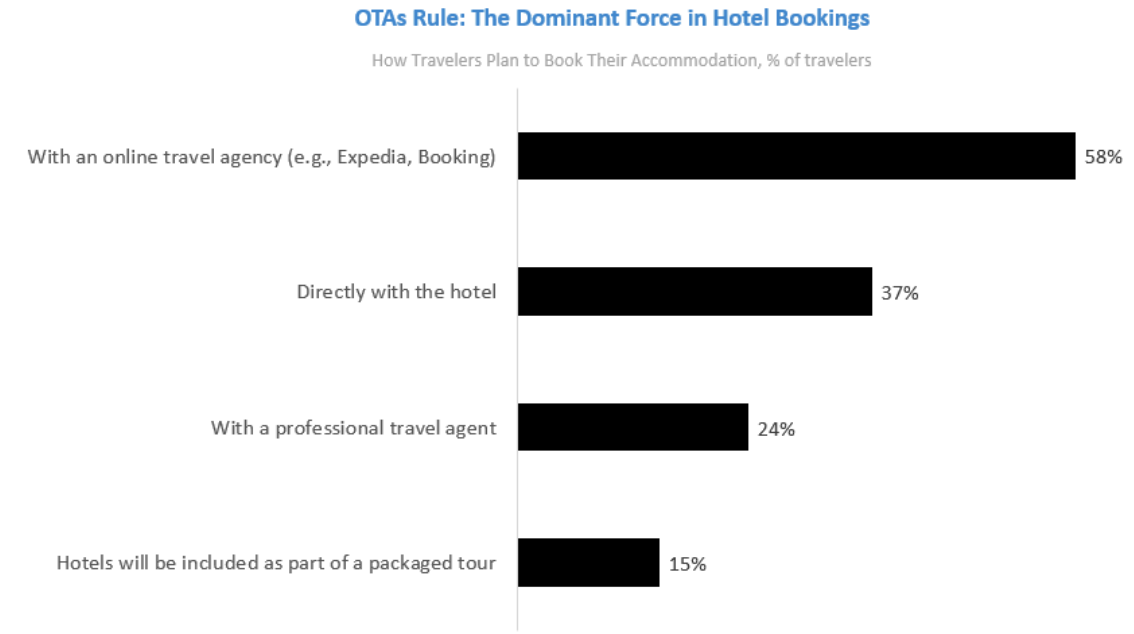
In contrast, our survey respondents — who show a clear preference for premium stays — expect to spend $145 per night on average, a significantly higher figure. This spending capacity aligns with their choice of accommodations, which skews heavily toward 4- and 5-star properties. The

data suggest that while these travelers may seek competitive pricing, they are ultimately willing to pay more for upscale experiences.

That said, price remains a key consideration. Location tops the list of deciding factors (61%), followed by price (56%) and online reviews (50%). Hotel brand reputation (49%) and amenities (36%) also play a crucial role, while sustainability initiatives (22%) and loyalty program benefits (20%) hold moderate importance.

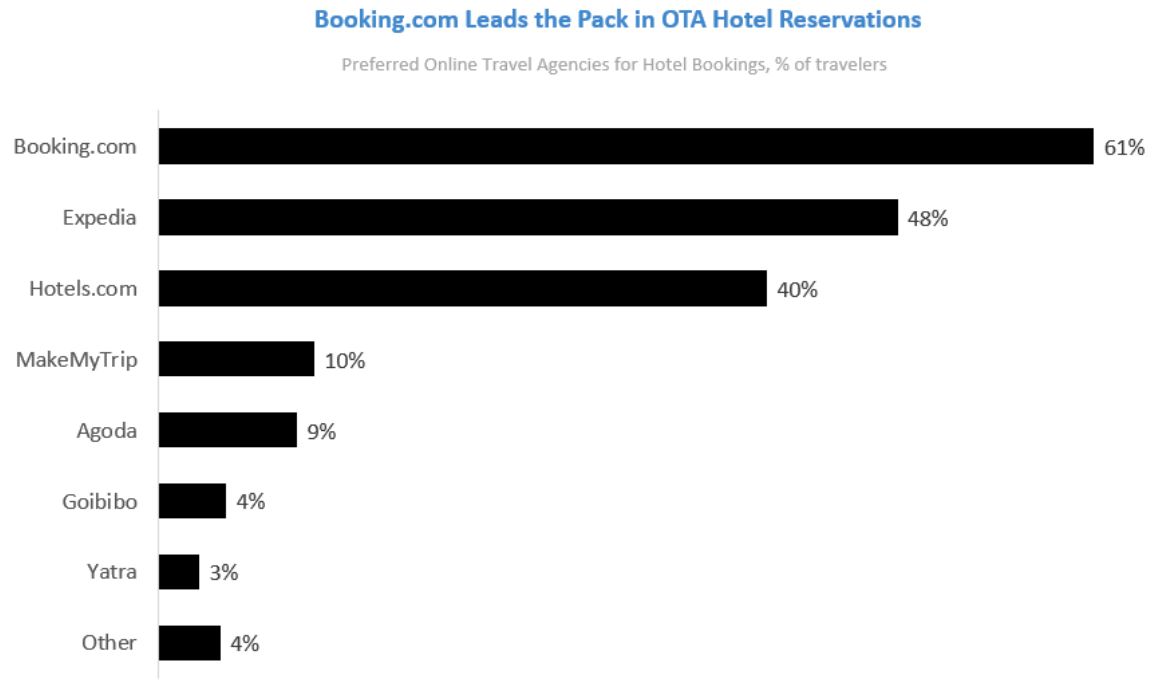



When it comes to booking platforms, the majority of travelers plan to book their hotels through online travel agencies (OTAs). Price competitiveness is a major driver, with 54% selecting a platform based on the best price offered and 43% prioritizing platforms that provide better room options or upgrades, further reinforcing the importance of value-driven decision-making.




How do you plan to book your accommodation? Please select all that apply
Source: India Inbound Survey of Travelers, U.S. n = 508, UK n = 493. Data as of February 2025

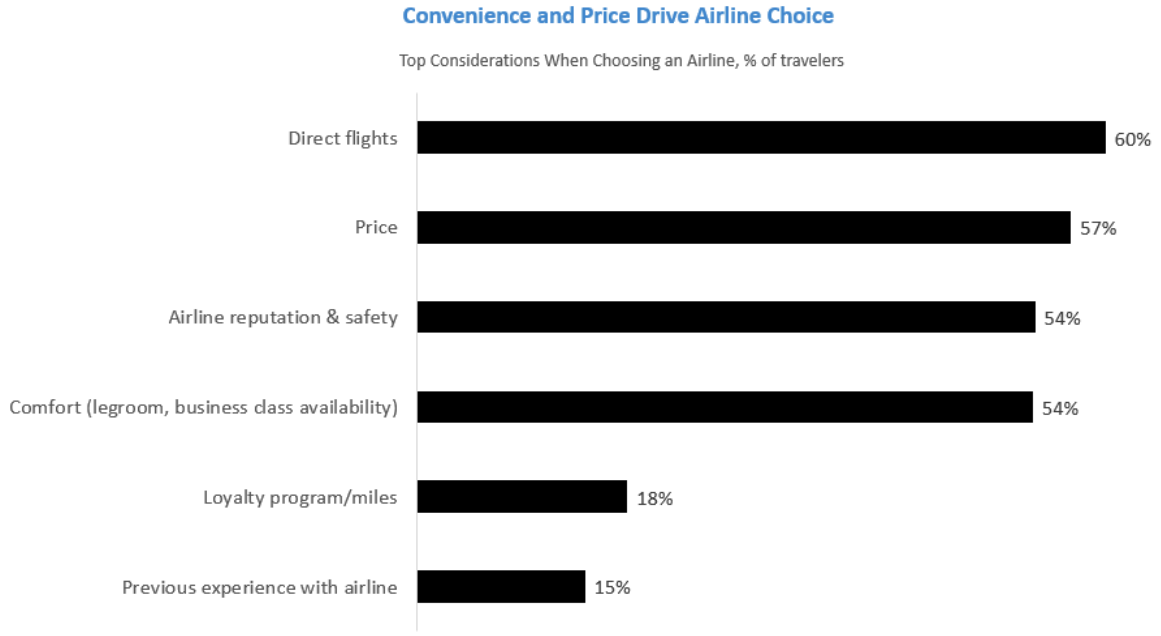
International OTAs dominate traveler preferences, with Booking.com (61%), Expedia (48%), and Hotels.com (40%) leading the market. Local platforms such as MakeMyTrip (10%), Goibibo (4%), and Yatra (3%) lag behind, suggesting that travelers perceive greater benefits — whether in pricing, inventory, or user experience — on global platforms. To compete, local OTAs and hotel stakeholders must enhance their offerings, whether through exclusive discounts, seamless loyalty integrations, or unique bundled experiences that create a stronger value proposition.




Which online travel agency (OTA) do you plan to use for booking your hotel? Please select all that apply.
Source: India Inbound Survey of Travelers, U.S. n = 508, UK n = 493. Data as of February 2025

## *Flights*

Our survey focused on travelers from the U.S. and the UK, with the majority planning to fly with full-service carriers for their trips to India in the next 12 months. However, this preference may not necessarily reflect a strong inclination toward comfort; rather, it could be influenced by the availability of options on their intended routes. Currently, full-service carriers dominate the long-haul market between India and the rest of the world, accounting for nearly 99.8% of total capacity on routes over 3,000 miles, according to Cirium data. Only two low-cost carriers — IndiGo and Norse — operate such flights, with limited routes primarily catering to lower-yield leisure markets such as Istanbul and Milan.



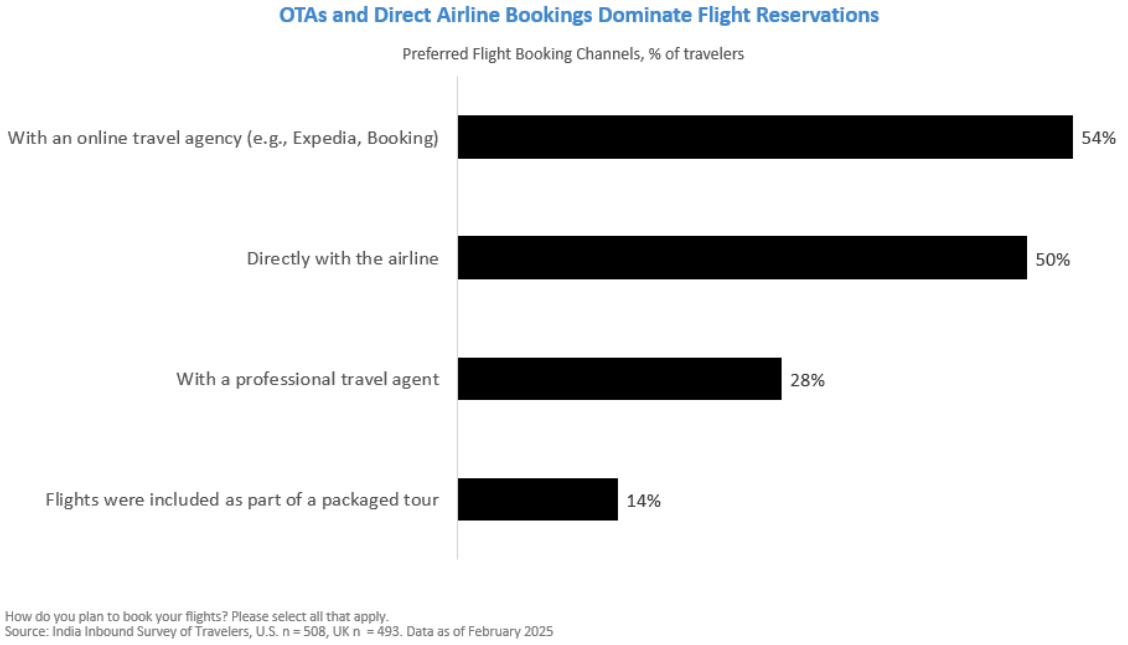

What factors will influence your airline choice? Please select all that apply.
Source: India Inbound Survey of Travelers, U.S. n = 508, UK n = 493. Data as of February 2025

When asked about the key factors influencing their airline choice, direct flights emerged as the most critical factor, with 60% prioritizing non-stop routes to avoid layovers and reduce travel time. Price remains a decisive factor, with 57% indicating that cost plays a major role in their decision-making. Comfort, including legroom and business-class availability, and airline reputation and safety were equally important, with 54% of respondents considering these aspects when choosing a carrier.

Loyalty programs and miles, while valuable for some, influenced only 18% of travelers, and previous experience with an airline ranked even lower at 15%. This suggests that while frequent flyer benefits and brand familiarity have some impact, they take a backseat to more practical considerations such as pricing, convenience, and perceived quality.

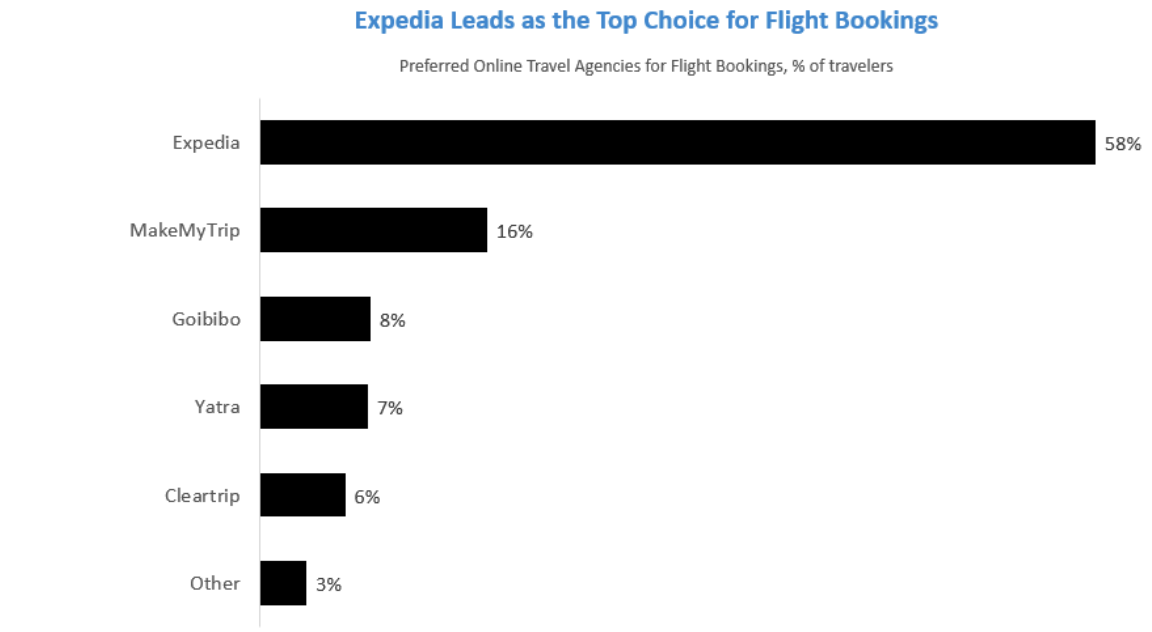
However, this dynamic could shift as low-cost carriers expand their presence in long-haul markets. With travelers currently allocating 22% of their total trip budget to flights, increased competition from budget airlines could lower airfare costs, freeing up more spending for in-destination experiences. While low-cost carriers are still largely absent on routes between India and major Western markets such as the U.S., the UK, and central/western Europe, this is

likely to change; IndiGo has already announced plans to launch flights between Delhi and Manchester/Amsterdam, and others, e.g. Wizz Air, have shown interest in expanding into new long-haul leisure routes. As more budget-friendly options become available, price-sensitive travelers may increasingly shift away from full-service carriers, fundamentally reshaping spending patterns and travel behavior.

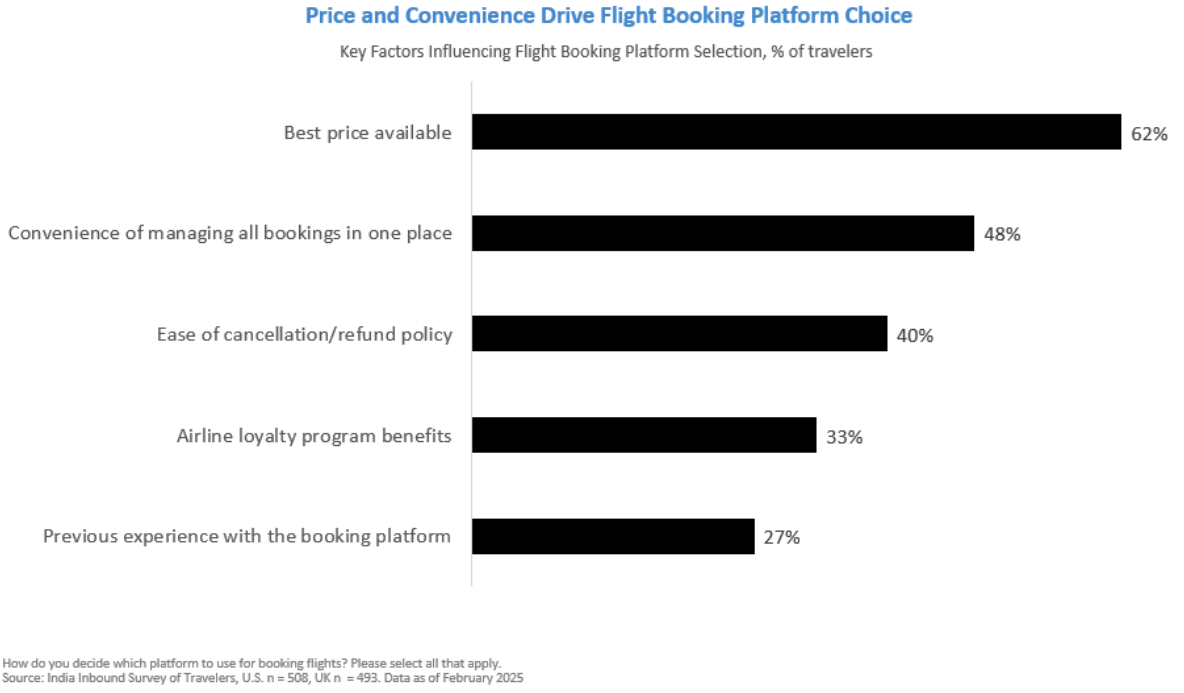



How do you plan to book your flights? Please select all that apply.
Source: India Inbound Survey of Travelers, U.S. n = 508, UK n = 493. Data as of February 2025

When it comes to flight bookings, direct airline websites and online travel agencies (OTAs) are almost evenly matched in preference. According to our survey, 54% of travelers plan to book their flights through an OTA such as Expedia or Booking.com, while 50% prefer booking directly with the airline. This is in stark contrast to hotel bookings, where OTAs dominate. Meanwhile, 28% of respondents intend to use a professional travel agent, and 14% will have their flights included as part of a packaged tour.




Expedia stands out as the clear leader among OTAs, with 58% of respondents selecting it as their preferred booking platform — far surpassing MakeMyTrip (18%) and Goibibo (8%).

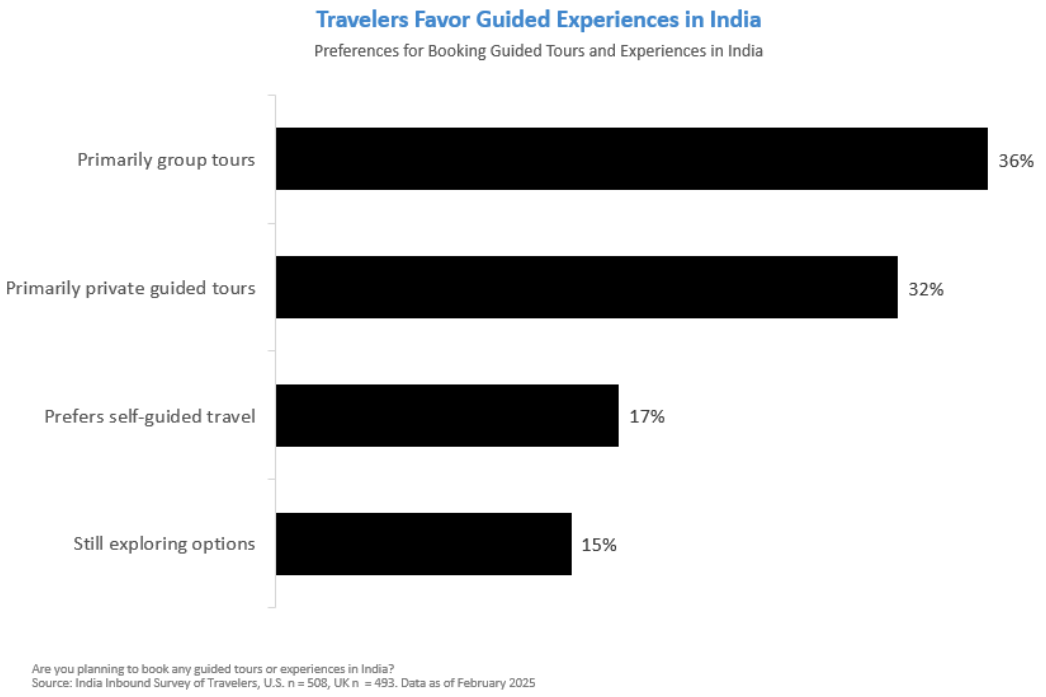



The key factor driving platform choice is price, with 62% selecting the option that offers the best fare. This indicates that while travelers may weigh other factors, cost remains the primary decision-making driver. Convenience is the second most important factor, with 48% of respondents preferring platforms that allow them to manage all their bookings in one place. This gives OTAs a clear advantage in offering a one-stop-shop experience, but direct airline websites

maintain a competitive edge by often providing the best prices. Expedia's dominance reinforces this trend, as it combines price competitiveness with the ease of managing bookings, making it a strong contender against direct airline websites.

Other influencing factors include ease of cancellation and refund policies (40%), airline loyalty program benefits (33%), and previous experience with the platform (27%). While loyalty programs hold some weight, they are not the primary driver, suggesting that price sensitivity and booking flexibility are more crucial considerations for travelers. The nearly equal preference between OTAs and direct bookings highlights a more balanced competitive landscape in flight reservations compared to hotels, where OTAs lead significantly.

## *Experiences*

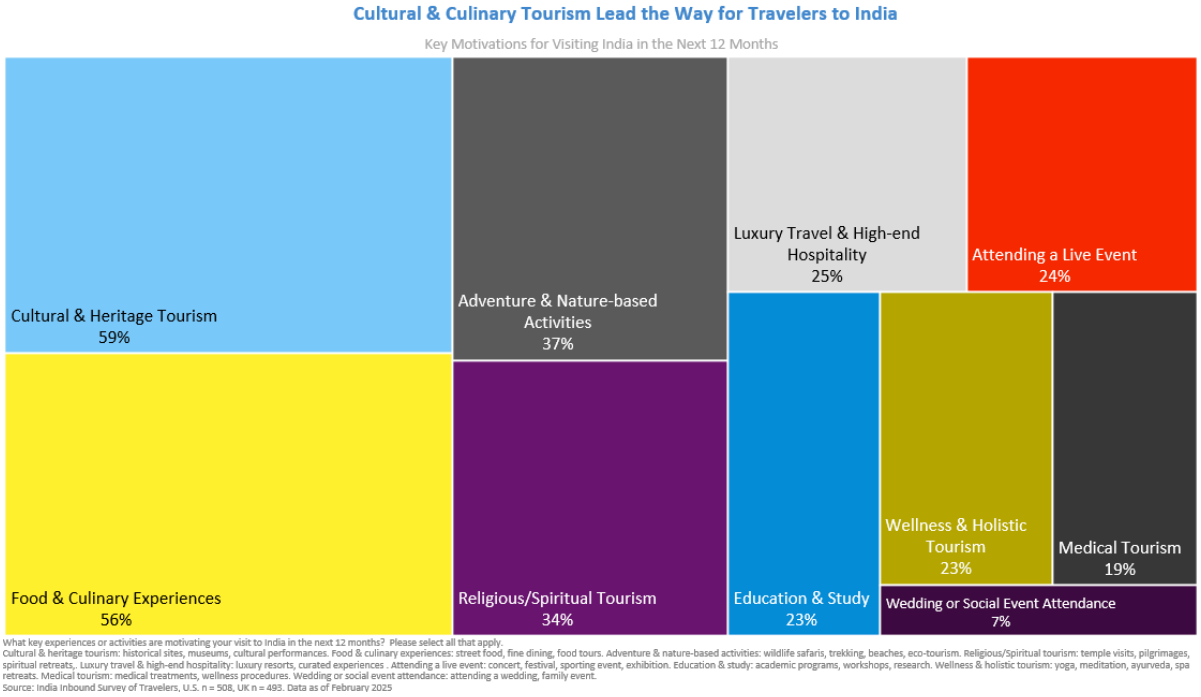



Travelers have diverse preferences when booking experiences in India. While 36% opt for group tours, 32% prefer private guided tours for a more personalized experience. Meanwhile, 17% favor self-guided travel, enjoying the flexibility to explore at their own pace, and 15% are still considering their options.

For tour companies and other travel stakeholders, these insights present opportunities to cater to different traveler segments. Businesses can enhance private guided tours with exclusive, high-end experiences to appeal to those seeking personalization. For group tours, creating immersive, well-structured itineraries with local cultural elements can attract travelers who enjoy social experiences. Additionally, offering self-guided travel resources, such as digital maps, app-based guides, and curated DIY itineraries, can engage independent travelers.

# WHAT ARE THE POTENTIAL GROWTH DRIVERS?

Understanding what motivates travelers to visit India is crucial for identifying growth opportunities in the tourism sector. Our survey asked respondents: "What key experiences or activities are motivating your visit to India in the next 12 months? Please select all that apply."



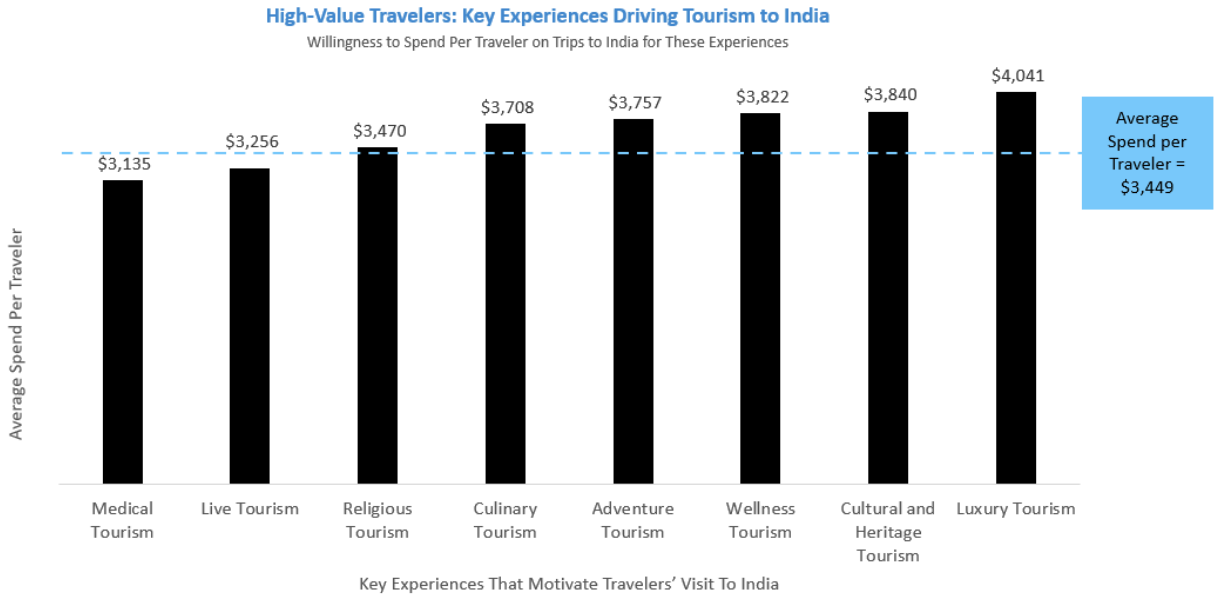

The results highlight strong interest in cultural and heritage tourism, with 59% of respondents selecting it as a reason for their visit. Food and culinary experiences follow closely at 56%, reflecting the global appeal of India's diverse gastronomy. Adventure and nature-based activities, including wildlife safaris, trekking, and eco-tourism, attract 37% of travelers, while 34% are drawn to religious and spiritual tourism, such as temple visits and pilgrimages.

Luxury travel and high-end hospitality appeal to 25% of respondents, and 24% plan to attend a live event, e.g. a concert, festival, or sporting event. Education and study programs, as well as wellness and holistic tourism, each motivate 23% of travelers, with wellness-focused visitors seeking experiences such as yoga, meditation, Ayurveda, and spa retreats. Medical tourism remains a niche but significant segment, with 19% of respondents citing it as a reason for their visit. Notably, weddings and social events — including destination weddings — drive travel for 7% of respondents, pointing to the potential of India's growing wedding tourism sector.

Luxury, wellness, and spiritual tourism together reflect a growing desire for experiences that offer personal enrichment, exclusivity, and transformation. India's portfolio of luxury offerings — from palace hotels and boutique retreats to curated experiences like private tiger safaris and heritage dining — is gaining recognition among global high-spenders.

On the wellness front, India's deep-rooted traditions in Ayurveda and yoga are being reimagined for the international traveler, with upscale wellness resorts offering immersive programs that combine physical rejuvenation with mental and spiritual well-being. Similarly, the rise of spiritual tourism is increasingly tied to experiences that promise introspection, mindfulness, and healing

— extending beyond conventional temple circuits to include meditation centers, ashrams, and sacred journeys curated for small groups or solo travelers.




While interest levels in these experiences vary, the economic contribution of each traveler segment is equally important. To assess this, we cross-tabulated survey data to calculate the average spend per traveler based on their primary motivation for visiting India.

Luxury travelers stand out as the highest spenders, with an average planned expenditure of $4,041 per person. However, despite their premium budgets, they make up a smaller share of inbound travelers (25%), limiting the overall revenue impact of this segment. In contrast, cultural and heritage tourism, with an average spend of $3,840, appeals to the largest share of visitors (59%), making it the highest revenue-generating segment.

Wellness tourism ($3,822 per traveler) commands a high spend, likely driven by premium retreats and holistic experiences, yet remains a niche market. As global interest in preventive health and mental well-being grows, India's ability to offer authentic wellness escapes at a variety of price points positions it as a serious contender in the global wellness tourism market.

Adventure and culinary tourism attract significant interest (37% and 56% of travelers, respectively) with moderate spending levels of around $3,700 per traveler, reinforcing their strong market potential.

Religious tourism ($3,470) continues to be a major contributor to India's travel economy, benefiting from a steady influx of visitors despite a slightly lower per-person spend. That said, the segment is evolving — with more travelers seeking structured spiritual itineraries, retreats led by spiritual teachers, and heritage-rich circuits such as the Char Dham and Buddhist trails. This evolution offers new monetization opportunities through curated travel products and enhanced infrastructure.

The recent Kumbh Mela served as a vivid reminder of India's ability to attract massive spiritual footfall, with millions of domestic and international visitors converging for this centuries-old ritual.

Events of such scale not only reinforce India's position as a spiritual hub but also highlight the need for infrastructure that can cater to both large-scale pilgrimages and more intimate, experience-driven spiritual journeys.

Meanwhile, live event attendees ($3,256) and medical tourists ($3,135) allocate their budgets differently — medical travelers likely prioritizing healthcare costs over leisure spending.

Overall, while spending varies by motivation, the weighted average spend per traveler across all segments is approximately $3,449, underscoring India's broad appeal across diverse traveler interests.

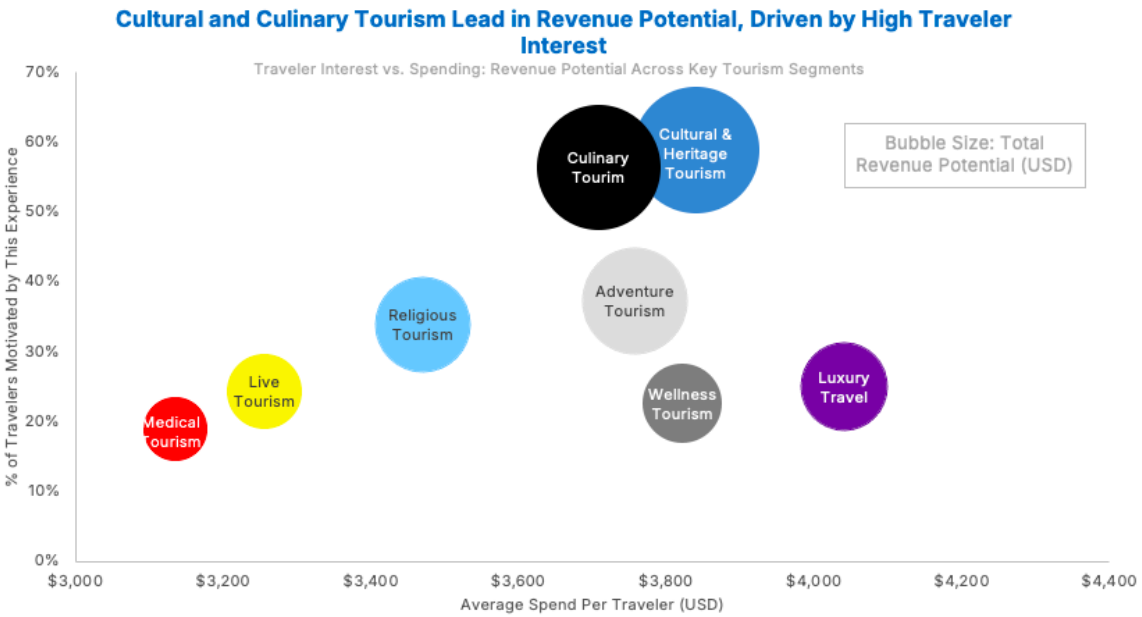
These insights highlight key areas of economic opportunity. Luxury, cultural, and wellness tourism not only attract high interest but also command premium spending, while adventure and culinary experiences continue to be strong revenue drivers. With segments like wellness and spiritual travel attracting discerning, higher-spending travelers, India's tourism strategy can benefit from focused investment in quality infrastructure, storytelling, and curated experiences that match rising global expectations. As we explore the potential revenue impact in the next section, it becomes clear that optimizing strategies for these high-spending traveler segments could significantly enhance India's tourism revenue.

# THE ECONOMIC CASE: WHY INVESTING IN THESE STRATEGIES PAYS OFF

To assess the revenue potential of various travel segments, we estimated the spending impact of foreign tourists visiting India, assuming international arrivals recover to 2019 levels. Our analysis is based on a survey conducted in the U.S. and the UK in February 2025, where respondents shared their travel intent and expected spending across different trip purposes. Participants could select multiple motivations for their trip to India in the next 12 months, allowing us to capture the overlapping nature of these experiences.

We then extrapolated these insights to estimate the percentage of travelers within each category across the broader U.S. and UK populations. To account for global inbound travel, we extended these estimates to other source markets and adjusted the spending levels accordingly. Given that U.S. and UK travelers are among the highest spenders and typically embark on long-haul trips, we adjusted the average spend for travelers from other countries to be 40% lower than that of U.S. and UK visitors. All figures were converted to U.S. dollars for consistency.

By multiplying the estimated number of travelers in each category by their respective average spending per trip, we calculated the total revenue potential of these travel segments. It is important to note that these figures represent overlapping categories rather than the total inbound tourism spend, as many travelers engage in multiple experiences during their visit.




How much do you expect to spend in total on your trip to India?
What key experiences or activities are motivating your visit to India in the next 12 months? Please select all that apply.
Note: The size of the bubbles represent the total amount each travel segment is willing to spend on their intended trip to India
Source: India Inbound Survey of Travelers, U.S. n = 508, UK n = 493. Data as of February 2025

| Total Revenue Potential of Each Travel Segment | | | |
|---|---|---|---|
| | Average Spend/Traveler | Percentage of Travelers | Total Revenue Potential(In Billion) |
| Cultural & Heritage Tourism | $ 3,840 | 59% | $ 21.9B |
| Culinary Tourism | $ 3,708 | 56% | $ 21.0B |
| Adventure Tourism | $ 3,757 | 37% | $ 14.7B |
| Religious Tourism | $ 3,470 | 34% | $ 11.9B |
| Luxury Travel | $ 4,041 | 25% | $ 10.1B |
| Wellness & Holistic Tourism | $ 3,822 | 23% | $ 8.7B |
| Live Tourism | $ 3,256 | 24% | $ 7.6B |
| Medical Tourism | $ 3,135 | 19% | $ 5.5B |

How much do you expect to spend in total on your trip to India?
What key experiences or activities are motivating your visit to India in the next 12 months? Please select all that apply.
Source: India Inbound Survey of Travelers, U.S. n = 508, UK n = 493. Data as of February 2025

The results highlight the immense economic opportunity in key travel segments. Cultural and heritage tourism stands out as the highest revenue-generating category, with an estimated spending potential of $21.9 billion, driven by its strong appeal to 59% of surveyed travelers. Culinary tourism follows closely, generating approximately $21 billion, reflecting the widespread interest in India's diverse food experiences. Adventure tourism, attracting 37% of travelers, contributes $14.7 billion, while religious tourism, with 34% participation, accounts for $11.9 billion in estimated spending.

Luxury travelers have the highest average spend per person at $4,041, the total revenue generated by this segment stands at $10.1 billion — lower than categories such as cultural, culinary, and adventure tourism. This is primarily due to the smaller proportion of travelers (25%) motivated by luxury experiences compared to the much larger share of travelers (59%) engaging in cultural and heritage tourism. In other words, despite luxury travel commanding a high per-person spend, its overall contribution to inbound tourism revenue is constrained by its niche appeal.

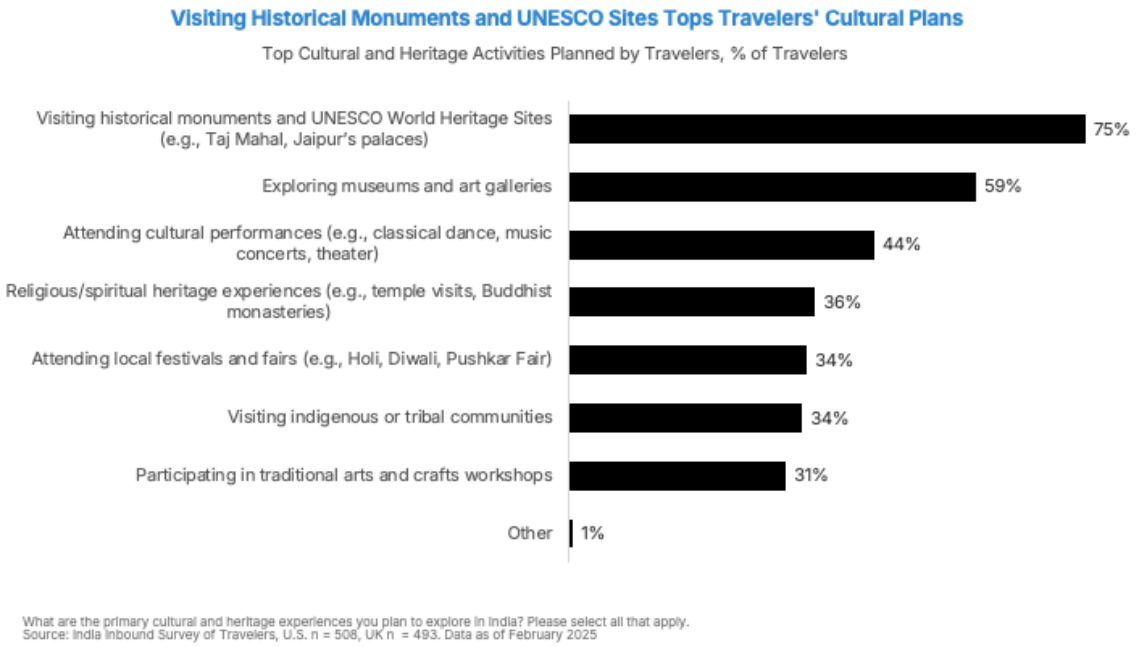
Wellness and medical tourism, despite having high per-trip spending, contribute lower total revenues of $8.7 billion and $5.5 billion, respectively, due to their more specialized appeal. Meanwhile, live event tourism, with 24% participation, generates $7.6 billion. Although its per-trip spending is lower than luxury or wellness travel, its broader traveler base drives notable revenue impact.

These data underscore the importance of strategic investment in high-value tourism segments. While luxury tourism remains lucrative on a per-traveler basis, broader economic gains can be achieved by enhancing experiences that attract a larger volume of visitors, such as cultural, culinary, and adventure tourism. By aligning infrastructure, marketing, and policy efforts to support both high-spend and high-volume travel segments, India can optimize its tourism-driven economic impact.

Now, let's take a closer look at what travelers seek in the two largest segments — cultural and culinary tourism.

## CULTURAL TOURISM

### WHAT EXPERIENCES DO TRAVELERS SEEK?




Cultural tourism remains a major draw, with 75% of travelers eager to visit historical monuments and UNESCO sites such as the Taj Mahal and Jaipur's royal palaces, the imposing Mehrangarh Fort in Jodhpur, and Udaipur's lakeside heritage. Museums and art galleries attract 59%, while 44% are interested in cultural performances, such as classical dance and theater. Religious and spiritual sites appeal to 36%, and local festivals like Holi and Diwali draw 34%. Rajasthan's vibrant event calendar — from the Pushkar Camel Fair to the Desert Festival in Jaisalmer — offers travelers immersive encounters with folk traditions, traditional attire, and regional crafts.

Other culturally rich states also feature prominently in travelers' aspirations. Odisha's Konark Sun Temple and tribal heritage appeal to seekers of ancient architecture and indigenous art. Madhya Pradesh, home to UNESCO sites like Khajuraho and Sanchi, offers a distinct blend of temple architecture, rock-cut caves, and wildlife sanctuaries that draw travelers interested in both history and nature. Engagements such as tribal village visits, traditional art workshops, and storytelling performances continue to gain traction among experience-driven travelers.

## KEY FACTORS INFLUENCING CULTURAL TOURISM CHOICES




The uniqueness of the experience is the top deciding factor (61%), followed by authenticity and local immersion (56%) and cost/value for money (55%). Reviews from platforms such as TripAdvisor influence 45%, while accessibility, booking ease, and guided vs. self-exploration preferences also play a role. Sustainability is a lower priority, considered by 20% — but this is a rising area of interest among younger and high-income travelers.

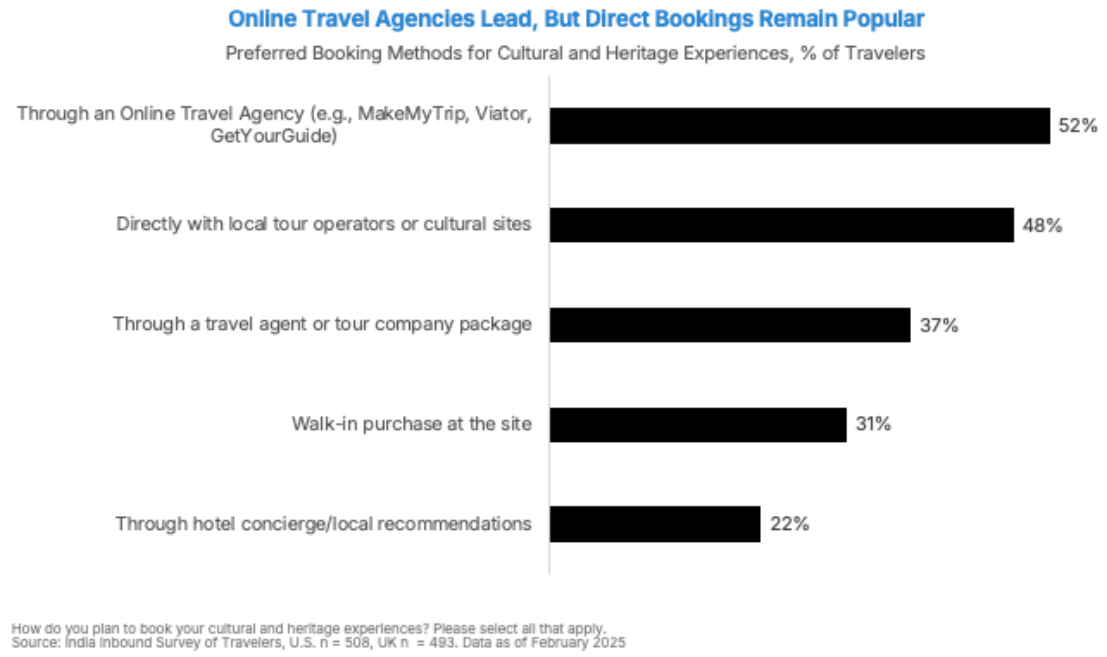
## WHY SUPPORTING HERITAGE TOURISM MATTERS

Regions like Rajasthan, Odisha, and Madhya Pradesh are not only cultural magnets — they are also key enablers of sustainable and inclusive tourism. As outlined in the KPMG India report, Heritage Tourism as a Tool for Sustainable Tourism: Preservation for Development released in July 2024, heritage destinations play a critical dual role: they attract high-value international travelers and contribute significantly to the preservation of local livelihoods, traditional knowledge systems, and cultural practices.

The report emphasizes that strategic investments in infrastructure, capacity building, and experiential storytelling can ensure that heritage tourism supports not just economic goals but also community empowerment and environmental sustainability. Rajasthan's palace circuits, Odisha's tribal crafts and temple trails, and Madhya Pradesh's archaeological marvels all exemplify how thoughtful tourism design can catalyze local development while protecting intangible heritage.

With tailored marketing and curated experiences, these regions can continue to drive high-volume and high-value visitation while reinforcing cultural resilience and place-based identity.

## HOW TRAVELERS BOOK CULTURAL EXPERIENCES




Most travelers (52%) book through online travel agencies, e.g. Viator and GetYourGuide, while 48% prefer direct bookings with local operators. Travel agents and tour packages appeal to 37%, 31% opt for walk-in purchases, and 22% rely on hotel concierge recommendations. Regional operators from heritage hubs — such as guided tours in Jaipur, tribal immersion programs in Odisha, or architectural trails in Madhya Pradesh — are increasingly leveraging digital platforms to reach international audiences while maintaining authentic, community-led experiences.

# CULINARY TOURISM

## WHAT DRIVES TRAVELERS TO EXPLORE INDIAN CUISINE?




Food plays a central role in travel experiences, and in India, it is a major attraction. The top motivations for culinary exploration include trying famous street food (67%) and discovering diverse regional cuisines (65%). Many travelers also seek immersive experiences such as visiting traditional markets and spice bazaars (47%) or indulging in fine dining at luxury restaurants (46%). Food festivals and culinary events attract 42% of visitors, while hands-on activities, such as cooking classes (34%) and unique beverage tastings (e.g. tea or craft cocktails) at 33%, also hold significant appeal.

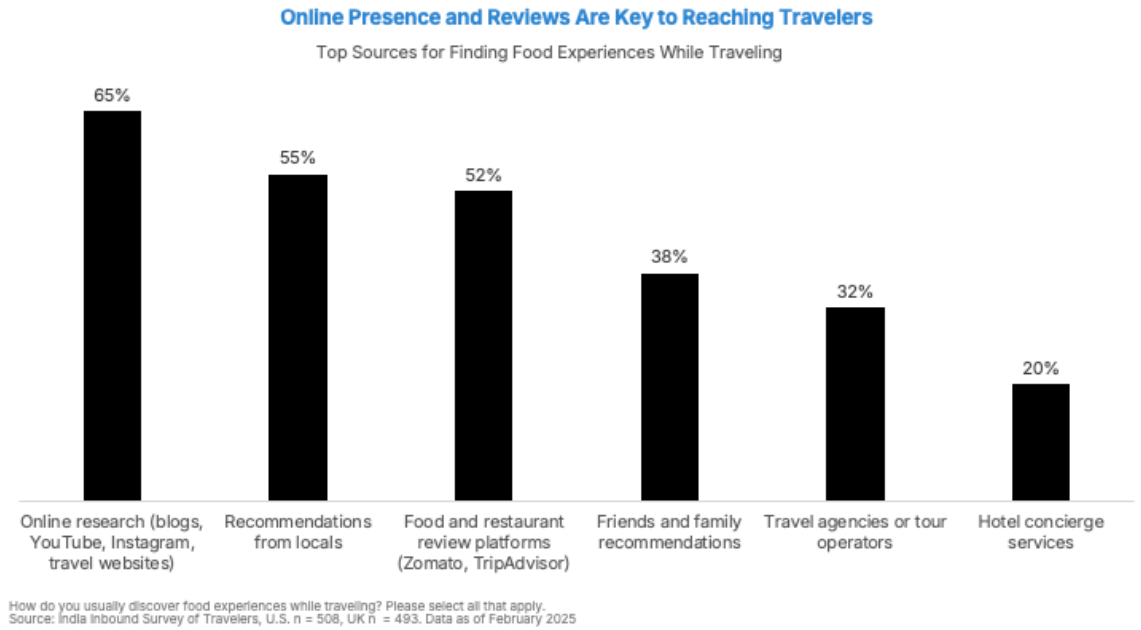
## TOP CULINARY EXPERIENCES SOUGHT BY TRAVELERS




Which type of food experience are you most interested in? Please select all that apply.
Source: India Inbound Survey of Travelers, U.S. n = 508, UK n = 493. Data as of February 2025

When it comes to food experiences, street food tours (59%) are the most popular choice, followed closely by authentic home-cooked meals with locals (56%) and visits to traditional dhabas and small eateries (55%). Many travelers also enjoy food and drink pairings, such as whiskey or wine with Indian cuisine (45%), or high-end dining at Michelin-starred restaurants and celebrity chef-led establishments (40%). More niche experiences, such as cooking workshops and masterclasses (22%) and farm-to-table experiences (20%), cater to those interested in learning and sustainability.

## HOW TRAVELERS DISCOVER FOOD EXPERIENCES



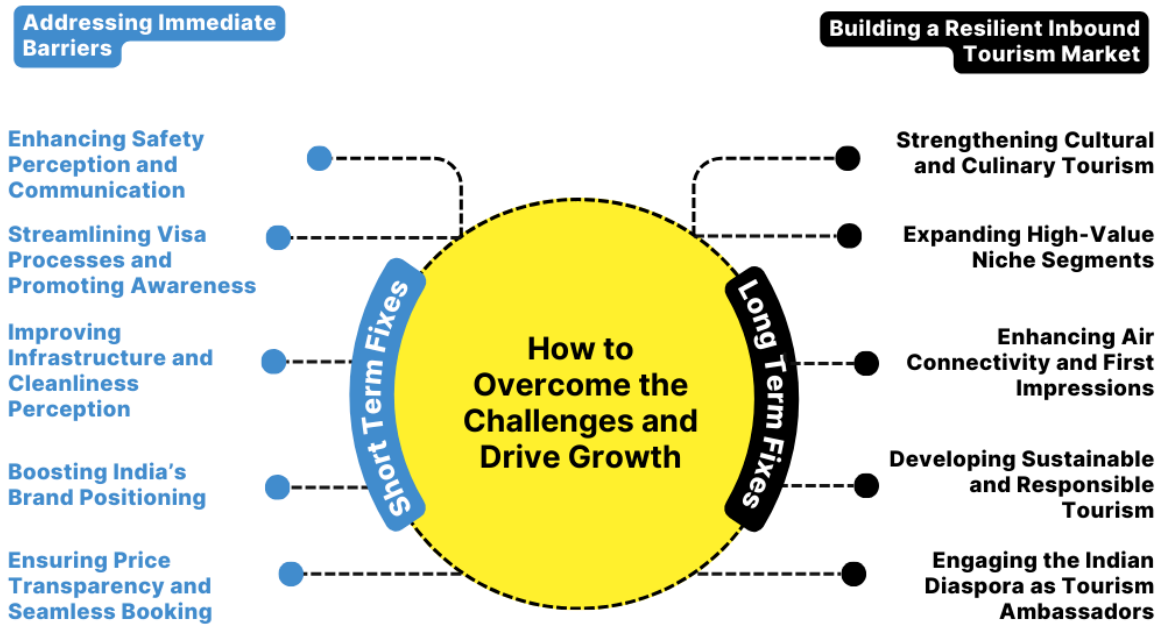

Most travelers rely on online research (65%), using blogs, YouTube, Instagram, and travel websites to plan their culinary adventures. Recommendations from locals (55%) and food review platforms such as Zomato and TripAdvisor (52%) also shape decisions. Friends and family (38%), travel agencies (32%), and hotel concierge services (20%) further contribute to travelers' discovery of unique food experiences.

## THE RISE OF PREMIUM FOOD EXPERIENCES

With growing interest in curated and exclusive dining, 58% of travelers are willing to pay a premium for experiences such as private chef-led meals or access to hidden food gems. This trend highlights the increasing demand for personalized, high-quality culinary adventures in India.

# SOLUTIONS: HOW TO OVERCOME THE CHALLENGES AND DRIVE GROWTH

India's inbound tourism has immense potential, but several barriers need to be addressed to fully capitalize on it. By implementing a combination of short-term fixes and long-term strategies, India can create a more attractive and seamless experience for foreign travelers. Drawing from global best practices, targeted policy changes, and infrastructure enhancements, India can unlock significant growth in this sector.




## SHORT-TERM FIXES: ADDRESSING IMMEDIATE BARRIERS

### ENHANCING SAFETY PERCEPTION AND COMMUNICATION

One of the biggest challenges deterring international travelers is safety perception. According to survey data, 30% of non-travelers cite safety concerns as a reason for not considering India. Addressing this requires a proactive approach. Establishing a centralized travel safety dashboard, similar to Japan's JNTO Safety Information portal, can provide real-time safety updates, emergency contacts, and traveler testimonials. This would reassure visitors and counter negative perceptions with factual, transparent communication. Additionally, digital campaigns featuring real traveler experiences can help dispel outdated notions and showcase India as a secure and welcoming destination.

## STREAMLINING VISA PROCESSES AND PROMOTING AWARENESS

Visa processes continue to be a friction point, with 15% of respondents mentioning entry requirements as a barrier. Expanding visa-on-arrival programs and creating awareness around India's e-visa system can significantly boost inbound travel. Thailand's expansion of visa exemptions for Chinese tourists led to a surge in arrivals — India can replicate this success by targeting its key markets such as the U.S. and the UK. A digital campaign educating travelers on streamlined visa options would further ease concerns.

## IMPROVING INFRASTRUCTURE AND CLEANLINESS PERCEPTION

Infrastructure and cleanliness issues are another critical deterrent, cited by 25% of surveyed non-travelers. Public–private partnerships can accelerate improvements in key tourist hotspots, much like Rwanda's successful efforts in transforming Kigali into one of Africa's cleanest cities. Establishing a 'Tourist-Friendly Destination' certification, similar to Singapore's 'SG Clean' initiative, can incentivize cities to enhance urban infrastructure, cleanliness, and traveler amenities.

## BOOSTING INDIA'S BRAND POSITIONING

India's marketing efforts must evolve to address perception gaps. Despite its rich cultural and historical appeal, India is not currently top-of-mind for many international travelers, with 63% of non-travelers indicating it was not part of their upcoming travel considerations. A targeted branding strategy, similar to the 'Inspired by Iceland' campaign, can elevate India's visibility and appeal in the minds of global tourists. Leveraging AI-driven personalized marketing, as demonstrated by Visit Britain, can help align India's diverse offerings with specific traveler interests, ensuring messaging resonates more effectively.

## ENSURING PRICE TRANSPARENCY AND SEAMLESS BOOKING

To improve the booking experience, India must focus on price transparency and seamless transactions. Dubai's collaboration with Expedia to offer bundled travel packages is a model that India could adopt. Additionally, launching an official 'India Travel Price Index,' similar to third-party travel cost estimators used for Singapore, would provide real-time pricing trends, helping travelers plan with confidence.

# LONG-TERM STRATEGIES: BUILDING A RESILIENT INBOUND TOURISM MARKET

## STRENGTHENING CULTURAL AND CULINARY TOURISM

Cultural and culinary tourism are the two highest revenue-generating segments, yet India has not fully optimized these strengths. With 59% of travelers selecting cultural and heritage experiences and 56% showing interest in Indian cuisine, these segments present massive opportunities. Developing curated heritage circuits with interactive digital guides, as Spain's 'Cultural Routes' program has done, can provide a richer travel experience. Additionally, supporting regional tourism initiatives, such as Japan's government-backed efforts to revitalize local economies through cultural tourism, can further strengthen India's appeal.

Culinary tourism also needs strategic investment. Street food tours, local cooking classes, and farm-to-table experiences are high-demand activities that can be better marketed to global travelers. Countries such as Thailand and Vietnam have successfully positioned their cuisine as a travel motivator — India should leverage its diverse food heritage through structured culinary tourism initiatives.

## EXPANDING HIGH-VALUE NICHE SEGMENTS

Beyond cultural and culinary tourism, other niche segments also present revenue potential. Luxury travelers, though smaller in volume, have the highest per-trip spend ($4,041 per person), followed by wellness tourism ($3,822) and adventure tourism ($3,700). India must invest in premium wellness retreats, Ayurveda-focused resorts, and adventure tourism hubs in the Himalayas and Western Ghats to capitalize on these high-spending travelers. Learning from Thailand's medical tourism model and Costa Rica's eco-tourism strategy, India can further refine its offerings in these sectors.

## ENHANCING AIR CONNECTIVITY AND FIRST IMPRESSIONS

Enhancing air connectivity is crucial for long-haul travel growth. Providing tax incentives for airlines to introduce more direct flights to major Indian cities can make travel more convenient. Dubai's aviation strategy, which transformed it into a major global hub, serves as an excellent example. Additionally, establishing dedicated India-themed retail and cultural zones at major international airports, similar to Changi Airport in Singapore, can create a strong first impression for travelers upon arrival.

## DEVELOPING SUSTAINABLE AND RESPONSIBLE TOURISM

Sustainability-focused tourism initiatives will also play a key role in shaping the future of inbound travel. Launching a 'Green India Tourism' certification program, similar to New Zealand's 'Tiaki

Promise,' can encourage eco-friendly hospitality and responsible travel practices. Bhutan's 'High-Value, Low-Impact' tourism model, which limits overtourism while preserving cultural integrity, is another approach India could explore in select heritage and ecological sites.

## ENGAGING THE INDIAN DIASPORA AS TOURISM AMBASSADORS

The Indian diaspora presents another opportunity to boost inbound tourism. A 'Return to Roots' campaign targeting second-generation Indian-origin travelers, could attract visitors looking to reconnect with their heritage. Exclusive travel packages for diaspora communities could further drive visits for cultural exploration, family reunions, and spiritual tourism.

# CONCLUSION

## THE CALL TO ACTION: TURNING INSIGHTS INTO RESULTS

India has all the necessary ingredients to be a global tourism powerhouse — rich cultural heritage, diverse landscapes, and unique experiences. However, to translate potential into reality, a coordinated effort across policy, marketing, and infrastructure is essential. Immediate next steps include establishing a tourism task force to oversee the short-term interventions detailed above, launching a data-driven digital campaign to counter negative perceptions, and strengthening partnerships with international and online travel agencies to simplify booking experiences.

By combining tactical interventions with the strategic long-term investments outlined in the previous section, India can reposition itself as a top-tier global travel destination. Implementing these solutions will not only drive inbound tourism growth but also create a more sustainable, traveler-friendly, and economically vibrant tourism industry.

# NOTES

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