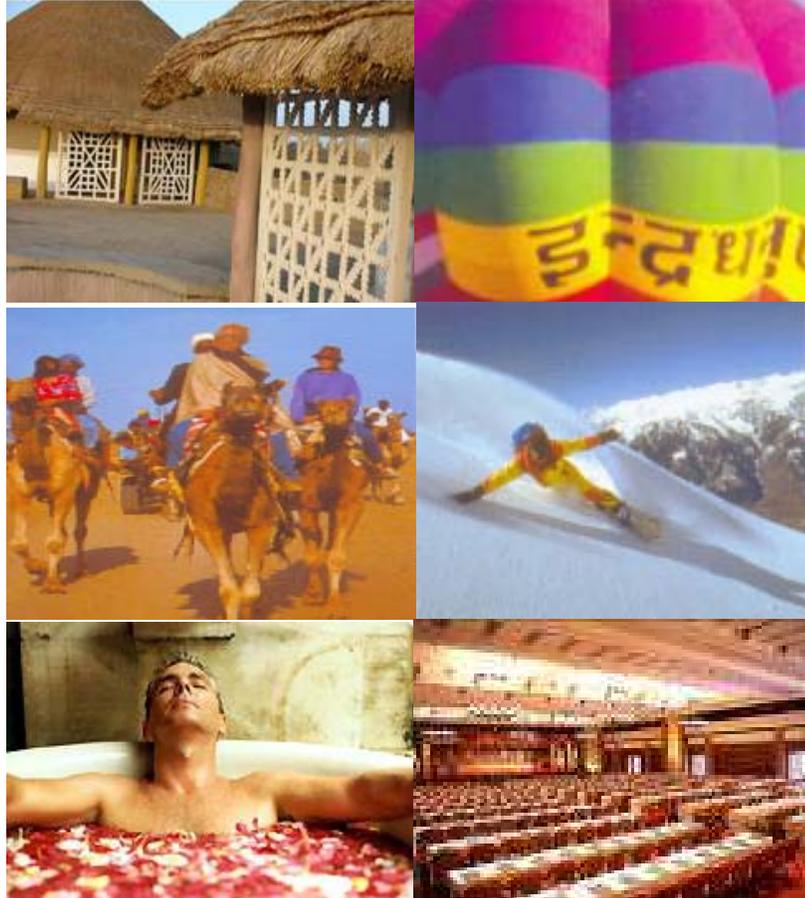# *Action Plan to increase Flow of Foreign Tourists visiting India from 3 mn to 15 mn in 5 years time, 20 mn in 8 years time and 25 mn in 10 years time*

Incredible !ndia

Final Report

Ministry of Tourism
Government of India
By
ACNielsen ORG-MARG Pvt. Ltd
New Delhi

December, 2007

LIST OF CONTENTS

LIST OF CONTENTS

LIST OF CONTENTS

Executive Summary

1. Foreign Tourist Arrival Trends India vs World - An Overview

The tourism industry in India has shown healthy signs of growth in the recent years. In 2004, India ranked 47th in world tourist arrivals with around 3.46 million tourists visiting the country. Moreover, foreign exchange earnings from tourism have been increasing at a gradual rate. In 2005, the estimated foreign exchange earnings were to the tune of 5731 million dollars (US$), which is an increase of 20.2% from previous year. Also, one of the interesting features of foreign exchange earnings from tourism in 2005 has been the per tourist exchange earnings in India.

Figure E.1: Estimated foreign exchange earnings per Countries vs. India
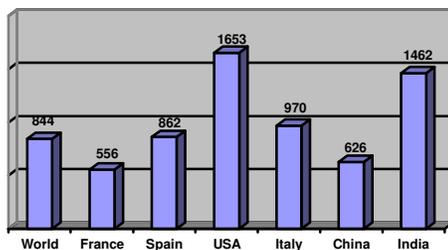
Source: World Tourism Organization

From the historical data it is evident that the maximum numbers of tourist arrivals have been in the year 2004. In the years 2001 and 2002, there was abrupt decline in tourist arrivals with negative annual growth registered for both the years. However, in 2003, the number of foreign tourist arrivals registered a phenomenal growth (14.3%) which continued in the subsequent year also. The trend has continued in the year 2005 as well.

The top ten countries which have been contributing to inbound tourism in the past few years are U.K., U.S.A., Canada, France, Sri Lanka, Germany, Japan, Malaysia, Australia and Italy. During 2004, all the ten tourist generating countries, registered positive growth. Maximum increase was registered in the case of Germany (51.8%) followed by Italy (39.8%). Also, Spain, which is among the top fifteen markets for India, registered a higher growth than Italy with around 40.4% increase in tourist arrivals in 2004. The chart below shows the country wise trends in tourist arrivals from the top ten countries for 5 years (2000 to 2004):

Figure E.2: Foreign Tourist arrival
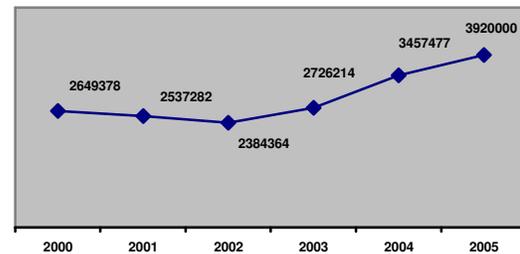
Source: Bureau of Immigration

Keeping the above facets in mind Ministry of Tourism, Government of India has approached ACNielsen ORG-MARG for preparing the action plan to augment foreign tourist arrival in the country. An evaluation and assessment of the various policies, strategies, infrastructural amenities in the country has been carried out and an action plan has been formulated to increase the traffic flow. The findings are as presented below.

2. Findings in relation to 3Ps

A snapshot of the evaluation of **P**roducts, **P**olicies and **P**romotional aspects is presented below. For details, kindly refer to the main report (Chapter 4)

2.1. Tourism Products

Cultural tourism - Cluttered information from so many websites, so many sources before a foreigner lands in India. The same needs to be streamlined.

Wildlife Tourism - The immense resource that India has to offer is not being utilized to the best of its potential. Majority of locations are not well developed, lacks connectivity, or are not being promoted to the fullest possible extent.

Eco-Tourism - No clear line of demarcation does not exist between Eco – tourism and other modes of tourism that is being promoted for the foreign tourists. The wilderness of a forest combined with localities / tribal lifestyle can specifically promote Eco- Tourism in India. A large no. of destinations can be promoted compared to the current bouquet of offerings. The promotion at present is somewhat scattered.

Medical Tourism - This is a sunrise sector in Indian tourism. As far as Hi-tech Healing is concerned, people from neighboring countries keep thronging in. The Spa's, Ayurveda and Yoga are really the strongholds, which needs to be marketed more aggressively

Adventure Tourism - Some modes of adventure tourism is yet to be developed properly in the Indian context. But commendable efforts have been put forth

with regard to some locations like Goa and Kerala.

Rural Tourism - No mention on the Ministry of Tourism's flagship website www.incredibleindia.org. or linkage to the website which explains rural tourism in India more vividly

MICE Tourism - Still to evolve considering the mileage taken by South East Asian countries (like Malaysia, Singapore etc) in developing and promoting the product. Lacunae exist in certain pockets with regard to promotion as well as infrastructure.

Buddhist Circuit - None as such. Connectivity needs to be improved. Communication about locations needs to be strengthened. The managers of hotels play the role of prime influencers/ suggestion makers to the visiting foreign tourists. A communication program needs to be developed involving these prime influencers

2.2. Tourism Policies

The significance of recommendations and strategies of the National Tourism Policy are not being realized by all states. While, some of the states have followed the key recommendations of National Tourism Policy and have formulated Perspective Plans; others have formulated their distinct state tourism policies and plans.

2.3. Promotional Issues

There is lack of an integrated campaign by the central government and states for tourism promotion. While the Ministry is going ahead with "Incredible India"

campaign, the states have their own distinct campaigns which do not co-relate with the central government campaign. Further, there is lack of co-ordination between Ministry of Tourism and state tourism departments for publicity and marketing in terms of financial or tactical assistance.

3. **Assessment of infrastructural amenities**

In order to achieve the goal of 10 million foreign tourists by 2010 as envisioned by Government of India, we need to build a strong base of basic and supporting infrastructure. The infrastructure prerequisites for tourism industry can be broken down into two basic types:

- *Internal infrastructure* – This implies to the basic and supporting infrastructure requirements within our country

- (such as rail, road and air infrastructure, accommodation facilities, etc.)

- *External infrastructure* - Inter country travel requires exhaustive procedures and processing. Passport and Visa facilitation, inter-country regulatory frameworks and policies are some of the components of external infrastructure.

A detailed evaluation of the internal as well as the external facets of infrastructure has been carried out in the main report. A synopsis has been presented below.

Infrastructural Amenity	Existing Scenario for Foreign Tourists	Way Forward
Rail	Existing amenities (exclusively earmarked for foreign tourists) are as follows:- • Tourist Bureau at major locations • Separate Reservation Quota in prime super fast and express trains • IndRail Passes • IRCTC Specials like Hill Steam Trains (e.g. Darjeeling Himalayan Railway Train) and Heritage Trains (like Palace on Wheels, Fairy Queen and Deccan Odyssey) • Online Booking Facility	• The Ministry of Railways in order to thwart the competition thrown by the budget airlines has started revamping the system. This includes introduction of new rakes, introduction of high speed trains in various routes as well as restructuring the major stations and providing them a new, modern look.

Infrastructural Amenity	Existing Scenario for Foreign Tourists	Way Forward
Road	• Though the country has an extensive network of national and state highways, the different modes of transport available to access the various destinations vary considerably. The product wise/ location wise evaluation of road transport has been highlighted in the main report	• The Golden Quadrangle Project conceived and currently under implementation is likely to boost up the surface transport in the country to a great extent. Under this ambitious project all the major metro cities would be connected through the national highways and 2 major highways would criss – cross the entire length of the nation .This project would provide impetus to the surface transport modes and would immensely help in boosting tourism in the coming years.
Air	• Presently, there are 16 international airports, 7 custom airports and 23 non-custom domestic airports operating in India. There are also a number of smaller airports having limited domestic operations other than these major airports. • Landing capacity of major airports being upgraded to facilitate landing of major types of aircrafts • Bilateral Air Service Agreements exist with major nations	• The Ministry of Civil Aviation, Government of India has allowed additional capacities under the "selective open sky policy" to manage tourist rush. • Airports Authority of India has scheduled the modernization of the 35 non-metro airports in three phases under the public private partnership (PPP) model. • Host of International airlines are starting or have already resumed operational or are touching new base in India
Sea	• The volume of foreign tourists arriving by sea remains considerably lower than those arriving by air as well as land. The trend of arrival by this mode is also erratic and no distinctive seasonality can be observed for the same.	• The Ministry of Tourism identified cruise tourism as having an immense potential for India. It carried out a study to assess the potential of cruise tourism in India and formulate a plan to develop cruise tourism circuits for the international market.

Infrastructural Amenity	Existing Scenario for Foreign Tourists	Way Forward
Accommodation	• The accommodation facilities available at different destinations in the country vary considerably; while some of the locations a variety of accommodation facilities to suit the different categories of travelers, some locations are lacking in even the basic accommodation facilities. The product wise/ location wise evaluation of accommodation facilitates has been highlighted in the main report	• International hotel chains (such as Six Continents, Carlson Hospitality and Marriott) are looking to increase their capacity in India, one of the fastest – growing hospitality markets across the globe. A host of mid-market and budget hotel brands like Accor are also chalking entry plans for the market.

Infrastructural Amenity	Existing Scenario for Foreign Tourists
Facilitation Norms	• In order to visit India, foreign travelers require visa permission prior to entering the country. The Consular Passport and Visa Division of the Ministry of External Affairs are responsible for issuance of Indian visas to the foreign nationals for their visit for various purposes. This facility is granted through various Indian missions abroad. At present, visa application is chargeable according to the type of visa applied.
Tourism Service Providers	• There are around 6000 travel trade companies and firms comprising of tour operators, travel agents and tourist transporters. Approximately, 1500 are members of representative trade bodies, i.e. associations
Tourism related Training	• In order to meet the manpower requirements of the tourism and hospitality industry, tourism related training and education facilities there are a number of hotel management and travel & tour Institutes in the country offering a wide variety of degree, diploma and certificate courses.

4. Feedback from Tourists, Travel Service Providers, Tourism Boards of prime competitors

ACNielsen ORG – MARG conducted exit interview of approx. 7500 tourists at prime tourist destinations across the country in order to obtain their first hand information about India in general. Simultaneously, feedback was also collated from the Travel agents and Tour operators at the destinations to gain insights about the various facets contributing to foreign tourist flow in the country. An outline of the feedback obtained is given below. For details of the feedback, kindly refer to the main report (Chapter 6).

   a. The majority of foreign tourists visiting the country are individual travelers
   b. Majority of the foreign visitors have indicated that they consider India as a destination of rich cultural heritage
   c. Heritage of the country is the most pre-dominant factor considered by the foreign tourists prior to their visit in India
   d. Majority of foreign tourists have indicated that they have come to know about the country from their friends as well as from the websites.
   e. According to the tour operators, the major problems faced by foreign tourists who wish to visit the country are the cumbersome immigration procedures at airports, inadequate frequency of flights to various destinations in the country, poor road infrastructure, insufficient hospitality services, inadequate medical facilities, lack of appropriate entertainment/recreation amenities at certain location and unsatisfactory modes of conveyance.
   f. In order to increase foreign tourist inflow to the country, the tour operators feel that the government should play a more pro-active role in tourism enhancement.
   g. The Hong Kong Tourism Board in particular suggested that India should package and market its destinations in a professional manner.

5. Case Studies

A few countries in recent times have started attracting more and more tourists and introduced them to the legacies, heritage, wilderness, flora and fauna as well as the various new modes that the world of tourism has to offer. A comparative study was carried out amongst the most popular destinations worldwide to appraise India's position as a potential tourism super power. The countries taken up for the study were:-

   ✓ *USA*
   ✓ *Canada*
   ✓ *France*
   ✓ *China*
   ✓ *Australia*
   ✓ *Macau*
   ✓ *Malaysia*
   ✓ *Thailand*
   ✓ *Singapore*
   ✓ *UAE*
   ✓ *Mauritius*

The parameters studied included:-

- o Tourism Industry status in the country,
- o the key destinations/ resources of the country
- o key tourism products promoted by the country
- o promotional modes adopted for tourism enhancement

For a detailed description of the case studies pls. refer Chapter 2 of the main report

6. Tourist Projections

Factors Considered

An attempt was made to forecast the inflow of foreign tourists considering various influencing factors, which are as follows:-

- ➤ *State of Indian economy*
- ➤ *Foreign National's awareness about India*
- ➤ *Upgradation of Infrastructural amenities*
- ➤ *Augmentation of Inter and Intra connectivity*
- ➤ *Trend in tourism product conceptualization and promotion*

Methodology

In forecasting the future trends of foreign tourist arrivals, ACNielsen ORG-MARG has considered 3 scenarios. The first one has been named **"The Vision"** as stated in the title of this study. The 2nd scenario has been named **"Realistic Scenario"** in which a growth rate for the year 2002-06 has been considered and it has been assumed that the same would continue for the subsequent period under consideration. The 3rd scenario has been

named as **"Scenario based on Current Growth rate"**, wherein growth rate for the 2006 over 2005 has been considered. The projections indicate how much of the foreign tourist arrivals can be achieved in the 3 scenarios and intends to present a comparative picture of the same.

The aforesaid figure indicates that growing at the current rate the foreign tourist arrivals would reach approximately 13.3 Mn, while considering the realistic growth rate we can reach 16.9 million foreign tourist arrivals by 2015 & shall touch 25 million as per the vision.

Likely Implications

The aforesaid projections indicate that we shall have to handle/accommodate additional foreign tourists to achieve the predicted targets. The actual no. of foreign tourists being handled per day currently and what we shall have to handle to achieve the 3 predicted scenarios have been depicted in the Tables below

Actual and Additional tourist arrivals/ day - 2006 over 2005

2005 Tourist arrival	2006 Tourist arrival
3920000	4430000

2005 Tourist arrival/day	2006 Tourist arrival/day	Additional tourists/ day
10740	12137	1397

All figures in Actuals

The aforesaid table implies that we have handled 12137 tourists/ day, which is 1397 more than the no. of tourists handled in the year 2005. Based on this, the actual and additional tourist arrivals for the 3 scenarios have been calculated for the year 2010 and 2015. The prime idea is to draw comparatives between the current capacity of handling foreign tourists vis a vis the projected trends for the years 2010 and 2015.

Scenarios of Tourist Flow	Implications – Tourists to be accommodated	
	The Year 2010	
	Actual Tourists / day	Additional Tourists / day [1]
The Vision	26189	14052
Realistic Scenario	21976	9839
@ Current Growth Rate ('05-'06)	19789	7652

Scenarios of Tourist Flow	Implications – Tourists to be accommodated	
	The Year 2015	
	Actual Tourists / day	Additional Tourists / day [1]
The Vision	68491	56354
Realistic Scenario	46301	34164
@ Current Growth Rate ('05-'06)	36460	24323

[1] – Over current foreign tourist arrivals/ day – 12137

The aforesaid table indicates that we shall have to accommodate an additional 14052 by the year 2010 and 56354 in the year 2015 if we are to achieve 25 million foreign tourist arrivals by the year 2015. To achieve 16 Million tourists, we shall have to handle 9839 additional tourists in the year 2010 and 34164 tourists in the year 2015. If the current growth rate sustains we shall have to handle 7652 additional foreign tourists in the year 2010 and 24323 additional foreign tourists in the year 2015.

Can a growth rate above 20% be achieved in foreign tourist arrivals?

The question remains, whether such robust growth rates (Above 20%) w.r.t foreign tourist arrivals have been achieved and sustained by any country in recent past? Case studies ndicate that certain South East Asian countries have infact achieved such robust growth rates in recent times

Though theses countries have not been able to sustain the robust growth rate, yet they have recorded fascinating growth rate of 20% + for a short period. ACNielsen ORG-MARG carried out a case study to identify the USP's being offered to the foreign tourists by these countries.

These countries have developed certain specific tourism products and has marketed themselves aggressively to draw foreign tourists to their soil. Additionally, they have spruced up their infrastructural amenities to deal with a traffic load. The prime objective is to make the stay of foreign tourists a memorable one. The handling of tourists from their arrival to departure, which is typical of those countries

To sum up, these countries have taken the following measures:-

- *Head of the State is involved in strategizing and planning resources for augmenting tourist flow*
- *An Air Conditioned environment to take care of the torrid equatorial climate and facilitate similar tourist flow round the year*
- *Availability of authorized money exchanger and trendy telephone booths at every vicinity*
- *Stringency in terms of cleanliness and hygiene, information disseminated to tourists about consequences of law violation*

The aforesaid indicates that India has the potential to achieve a robust growth rate. Though achieving and sustaining a growth in excess of 21% for a period of 9 years seems to be a daunsting taks, but it can be achieved if infrastructural and other subsidiary modes are geared up.

7. SWOT Analysis

Strengths, Weaknesses, Opportunities and Threats of the Indian Tourism at an overall level, in view of the challenges thrown up by competing nations, as understood from the feedback received from different sources, discussed above, are elaborated below

Strength	**Weaknesses**
➢ India has an immense bouquet of destinations of diverse types, more than what many countries have to offer together at an aggregate level. ➢ A rich saga which offers an unique combination of past and present, which includes architecture, culture, modern amenities and facilities as well ➢ Some products like "Rural Tourism" are unique in nature, which no other country has thought of or conceived of. ➢ A wonderful promotional campaign which has attracted attention of millions of globe trotters across the world.	➢ Lack of co-ordination amongst the States as well as Centre in promoting destinations/ products. The Centre as well as the State promotes destinations independently. Such multiplicity of destinations create confusion in the minds of the foreign tourists visiting / willing to visit India as where should one start from? ➢ Procedure for release of Visa is a comparatively lengthy procedure, compared to the South East Asian nations ➢ Certain airports lack appropriate infrastructure which promulgates foreign airlines to shy away from them ➢ Lack of appropriate connectivity amongst certain prime destinations within the country. E.g. Air fares between certain domestic destinations within the country is equivalent or somewhat more than connecting flights abroad ➢ Lack of quality accommodation facility amongst major destinations across the country. Demand spurs higher room rent, which eats up considerable proportion of a foreign tourist's budget. Subsequently, the tourist stays for a considerably lesser time and in the process has limited period of exposure to the country and its resources in general ➢ Climate of certain locations within India being temperate in nature, there is considerable hindrance in marketing those places as a "365 day destination" unlike major South East Asian Countries, which have geared up its infrastructure to deal with this type of climate
Opportunity	**Threat**
➢ India as a destination provides "value for money" compared to the other South East Asian as well as South Asian nations ➢ India offers diverse kinds and types of destination, in form of a complete package, compared to the south east/ far east countries which strongly promote one or two themes/ products. ➢ Wide base of English speaking population – a major advantage compared to the South East Asian nations ➢ Booming economy, growing foreign investment in the major sectors have prompted immense flow of foreigners in recent times. Word of mouth has promoted Indian Tourism on the whole. ➢ The International events like the upcoming Commonwealth Games in New Delhi in the year 2010 presents India with a platform to attract more and more foreign visitors.	➢ China is developing it's infrastructure keeping in mind the 2008 Olympics and it plans to use this as a major event in attracting tourists. The Beijing – Lhasa railway line is an important indicator in this direction. ➢ Pro active and systematic marketing efforts of the comparatively smaller South East Asian nations and their focus on developing an infrastructure based on tourism. ➢ Off late, Sri Lanka is actively promoting it's tourism resources with focus mainly on its natural resources (sprawling beaches, evergreen forests, tea gardens) ➢ Dubai is aggressively marketing itself as a major tourism destination. The world's most ambitious project, the Dubai waterfront is shaping up to be a major tourist attraction of the world, which on completion is likely to draw scores of tourists to witness this engineering marvel.

8. **Objective**

While the overall objective of the action plan would be to improve upon the flow of the foreign tourists in a sustainable manner through improved management of the resource base, infrastructural amenities, policies as well as regulations. It has certain specific set of objectives for different stakeholders in the value chain. They are as mentioned below: -

For Tourism Service Providers (Accommodation Units, Travel Agents/ Tour Operators, Transport Service providers)

❖ To ensure better realization by rendering world class service quality
❖ To help conceive new products/ concepts
❖ To help market new destinations

For the Central Government/ State Government

❖ To augment foreign exchange in the state/ central exchequer
❖ To collaborate with each other to formulate comprehensive front – end (marketing and promotion to the foreign tourists) as well as back – end (infrastructure, connectivity etc.) strategies
❖ To collaborate with the Tourism service providers, addressing critical issues and incorporating their suggestions to make India the happening global tourism hub
❖ To review the steps taken time to time to check progress

For the Tourists/ potential tourists

❖ To receive comprehensive information about the destinations, resources it offers, connectivity modes, accommodation options and availability, facilitation options etc.
❖ To enjoy their stay in India and recommend the destination to others

Strategy

The action plan would be able to address certain critical constraints to streamline lacunae hindering the flow of foreign tourists in the country. The same would be a five - fold strategy, which would encompass:-

I.   *Strategy to improve upon the Infrastructural Amenities*
II. *Strategy to co-ordinate with different Government departments on product conceptualization, design and promotion*
III. *Strategy to ease norms to augment arrival of foreign tourists*
IV. *Strategy to provide better hospitality to the visiting foreigners*
V.   *Strategy to incorporate the major influencers in Travel and Tourism trade as partners*

What tourism products can be the targeted

As per opinion of the different stakeholders (travel agents and tour operators) during primary survey a categorization of potential target markets and target products have been done as elaborated in the figure below.

Estimated Targets – Assuming 16.9 Million Foreign Tourist arrivals

This implies we can target 8.05 Mn foreign tourists in traditional products like Cultural and Heritage Tourism and for new concepts like Medical/ SPA, MICE/ Business, Religious/ Buddhist and Fairs and Festivals, we can target approx. 8.85 Mn foreign tourist arrivals from the target nations.

Estimated Targets – Assuming 25 Million Foreign Tourist arrivals

This implies we can target 14.1 Mn foreign tourists in traditional products like Cultural and Heritage Tourism and for new concepts like Medical/ SPA, MICE/ Business, Religious/ Buddhist and Fairs and Festivals, we can target approx. 10.9 Mn foreign tourist arrivals from the target nations.

The vision/ optimistic scenario can be achieved if:-

Ministry fo Home Affairs, Directorate General of Civil Aviation, Ministry of Finance, Ministry of Surface Transport, Railways should be under the direct chairmanship & co-ordination of PMO, so that prompt and immediate action can be taken to resolve issues

New Concepts

Medical / SPA
2.6 Mn

MICE / BUSINESS
3.4 Mn

Religious / Buddhist
3.1 Mn

Fairs &
Festivals
1.8 Mn

- **Germany – 0.3 Mn**
- **France – 0.3 Mn**
- **Spain – 0.3 Mn**
- **U .K – 0.4 Mn**
- **Nether - 0.2 Mn**
- **USA – 0.5 Mn**
- **Mid East - 0.4 Mn**
- **Africa – 0.2**

- **Korea – 0.2 Mn**
- **Singapore – 0.5 Mn**
- **USA – 1.2 Mn**
- **Canada – 0.6 Mn**
- **Australia – 0.3 Mn**
- **Germany – 0.6 Mn**

- **Thailand – 0.40 Mn**
- **Japan – 0.70 Mn**
- **Malaysia – 0.5 Mn**
- **Korea – 0.3 Mn**
- **China – 0.3 Mn**
- **USA – 0.50 Mn**
- **France – 0.40 Mn**

- **Canada - 0.6 Mn**
- **USA – 0.6 Mn**
- **Austr – 0.6 Mn**

Goals & Priorities	Actions/ Steps to be taken	Responsibilities
Setting up a centralised tourism repository	a. Information collation about top 50 Tourist destinations in India about the following :- *1. Tourism resources of the location* *2. Nearest port of entry and flight connectivity details (E.g:- London to Mumbai for Tourist Destination of Ajanta)* *3. Connectivity modes with point of entry (E.g. Mumbai - Ajanta)* *4. Accommodation facility – comprehensive listing of Classified Hotels and their contacts* *5. Restaurants and Cafes available and cuisines served* *6. Entertainment options available* *7. Other tourism spots nearby* *8. Visa procedures and facilitation* b. Linking the information to Incredible India website **c.** Regular review and updation of the website, flashing information in case of an emergency/ important developments	• Survey Agencies • IT Consultants selected by Ministry of Tourism • Ministry of Tourism for overall supervision • Ministry of External Affairs and Ministry of Civil Aviation to provide support
"Visa on Arrival" facility	a. Earmark 15000 sq.ft at Delhi, Mumbai, Hyderabad, Bangalore, Kolkata Airports for "Visa on Arrival" Services. (Each entry point must have at least 50 counters) b. The earmarked areas to have clean public convenience facilities, refreshment zones, entertainment options showcasing India's diverse	• Airports Authority of India • Ministry of External Affairs

	tourism products	
	c. Designate 100 skilled immigration officials at each port of entry for the procedure	
	d. Update this information in the Tourism repository	
Goals & Priorities	**Actions/ Steps to be taken**	**Responsibilities**
Enhance visibility / signage within the Airport (prior to exit from the premises)	a. Demarcation of services like Radio Taxis, Prepaid Taxis, Auto, Transfer to Hotels/ Business Centres/ Cafeteria/ Shopping Arcades b. Prepaid Taxi Challans to print the registration number of the Taxis to help out the Tourists c. Pvt. developers associated with different international airports to look into the matter d. Setting up 60/80 Business Hotels with all modern amenities and facilities within the Airport premises to help Business visitors	• Airports Authority of India • Hotel Associations • Local Road Transport Organisation
Increasing Off peak Tourism activity	a. Develop/ co-ordinate a major out of season country wide festival (may be cuisines/ shopping fiestas/ festivals) annually to increase flow of tourists	• Ministry of Tourism in co-ordination with the State Tourism authorities
Developing the New Concept – Medical Tourism	a. To be promoted aggressively along with CII in countries like Germany, France, Spain, UK, Netherlands, USA, Africa, b. Initiate Corporate hospital chains – Escorts, Fortis, Apollo to tie up with travel operators and LCA by providing a package deal to the medical tourist for the entire duration of stay. c. Identify serene/ reclusive spots near Medical tourism locations – Bangalore, Hyderabad, Chennai, Trivandrum and promote the same amongst intending visitors d. MOT in association with MOHFW, organise aggressive	• CII • Pvt. Hospital Chains • Low Cost Airlines like Deccan, Spicejet, Indigo • Travel Agents

Goals & Priorities	Actions/ Steps to be taken	Responsibilities
	campaign - Medical Conclave in select overseas location with help of leading practitioners – heart specialists, physiotherapists, organs transplantations, cancer specialists, kidney, ophthalmologists to promote major treatments along with 4/5 days leisure packages to nearby locations e. Promote medical tourism in the African countries like Nigeria, Zaire, Mauritius, Mozambique etc.	

Developing the New Concept – MICE Tourism	a. Develop the following locations and promote them as MICE Tourism hubs:-
	  - Delhi
	  - Jaipur
	  - Goa
	  - Hyderabad
	  - Bangalore
	  - Cochin
	b. ICPB to liaison with Industry Associations, Export Bodies like EPCH, PLEXCONCIL, GEMS& JEWELLERY, ELCINA to promote Trade Fairs and Exhibitions in the Target Markets
	c. Delegation of Industry experts and ICPB to travel to Germany, USA, Canada, Korea, Singapore, China Autralia for inviting them to India
	d. Invite Developers to develop world class Convention Centres with multimodal transport facility, entertainment facility, 5 star rooms, restaurants, security, shopping paradise
	e. Promote private participation for integrated convention centers with multi media kits & translations / interpretation facilities
	f. Arrange for complimentary gifts / mementoes from Ministry of
		• State Tourism Boards
		• ICPB
		• ITPO
		• Apex Bodies
		• Export Bodies

Goals & Priorities	Actions/ Steps to be taken	Responsibilities
	Tourism. Arrange for marketing collaterals / presentations to incite awareness	
Aggressively marketing identified tourism products in the identified markets – Religious/ Buddhist Tourism	a. Establish Bi-lateral ASA (speedy renewal in case of expiry) with Korea, Thailand, Japan, Malaysia, China, France and USA b. Foreign Airlines like JAL, Malaysian, Singapore, Thai Airways, should increase the monthly frequency three folds (from December to March) to Kolkata, which should be promoted as the gateway of Entry for Buddhist tourists c. Develop a special luxury tourist train starting from Calcutta trudging across Bodhgaya, Nalanda, Rajgir, Kushinagar, Sanchi, Sravasti, Sarnath. d. Develop connectivity between Varanasi and Mumbai for enabling visit to Ajanta & Ellora via Aurangabad through Low Cost Carriers e. Develop off beat destinations like Guneri, Kesaria, Lauria, Vidisha. f. Set up Govt. approved Souvenir shops, Hygienic Restaurants providing South East Asian Cuisines, Clean drinking water facilities at all locations	• Ministry of Tourism/ State Tourism Department – for promotions • Ministry of Railways – for connectivity and providing destination specific train • Local Bodies / Hotel Association, Transporation, Sanitation, Handicrafts - for providing resources
Developing and maintaining a Tourism Repository	a. Developing a repository of tourism information b. Provide and promote an Incredible India information service to potential visitors through a call centre including facility to make bookings and order support literature	• Ministry of Tourism to take a call, to outsource database designing and maintenance

Goals & Priorities	Actions/ Steps to be taken	Responsibilities
Ensuring Accommodation meets market demand	a. Providing accurate up to date information on market demand/ supply of accommodation in the country for specific sites of key products like Medical, MICE, Wildlife, Adventure b. Encouraging FHRAI to set up an online booking system c. Encourage unclassified/ approved hotels to set up self regulatory organisation	• Ministry of Tourism
Enhancing the internal infrastructure	a. Improving quality of roads, national as well as State Highways linking airports & rail heads to important tourist destinations b. Luxury Trains to trudge across important heritage locations c. Introduction of Bharat Darshan Trains – a semi premium category to link important locations	• NHAI, Ministry of Road Transport, State PWD's • Ministry of Railways • State Tourism Departments
Ensuring high quality of service amongst all stakeholders	a. Motivating stakeholders to promote a positive, quality image of India b. Encourage higher standards of customer care and welcome c. Encourage stakeholders to adopt harmonized quality standard norm	• Ministry of Tourism • International Certification Agencies
Pay requisite attention to Domestic Tourism as well	a. Implement special incentive programme for the domestic tourists in the off season	• State Tourism Authorities • Ministry of Tourism
Developing Human Resource in Travel and Tourism	a. Encourage premier institutes to incorporate courses on Tourism at the Post graduate level b. Special programmes to be initiated for Training/ Skill upgradation of existing professionals	• Ministry of Tourism • AICTE, Min. of HRD • Educational Institutes

Goals & Priorities	Actions/ Steps to be taken	Responsibilities
Involve Community participation	a. Consult local communities on significant tourism issues b. A consultative forum to be established to provide intelligence and inform future strategies	• State Tourism Authorities
Conceptualize new products like "Tribal Tourism" wherein India has a stronghold	a. Identification of circuits that can be promoted b. Identification of target overseas markets – most likely markets are Western European and Americas c. Developing connectivity with major railheads and airports d. Developing infrastructure at the nearest location	• Ministry of Tourism/ State Tourism Departments in consultation with leading consultancy organisations
Review the worldwide trends at regular intervals and implement new concepts	a. Get vivid idea about the new tourism products b. Undertaking a SWOT/ Strategic analysis based on Tourism resources at the overall level c. Undertaking a 2nd level SWOT analysis based on identified destinations based on d. Carrying out a feasibility of the locations	• Consultancy Organisation under the aegis of Ministry of Tourism
Setting up "Paryatan Bhawan" at the Gateway of Entry	a. To set up a "One Window Outlet" for providing better service to foreign tourists	• State Tourism Departments, Airlines, Leading Hotel Chains, State Tourism Offices, Travel Agents

Short Term (To achieve 10 Mn by 2010)	Long Term (To achieve 25 Mn by 2015)
Setting up a centralised tourism repository covering top 50 destinations	Setting up a centralised tourism repository covering top 100-125 destinations
Initiate "Visa on Arrival" at Delhi, Mumbai, Hyderabad, **Bangalore, Kolkata Airports.**	Ensuring Accommodation meets market demand
Enhance visibility / signage within the Airport (prior to exit from the premises)	Ensuring 150000 professionally qualified tourism professionals are available by the year 2012
Modernize airstrips/ airports like Jaipur, Agra, Varanasi, Gaya, Bhubaneshwar, Guwahati, Calicut, Hassan to enable direct connectivity with source markets with specified products. Increase passenger handling capacity with necessary infrastructure like passenger terminal**,** parking bay, improved check in counters and luggage handling systems	ICPB + Industry Experts to market India overseas and promote the destination as MICE hub of South Asia
State Govt. to promote specific products highlighted in the Action Plan like Medical, Buddhist, MICE, Fairs & Festivals and prepare a comprehensive package with leading Hotels, Agents and Low Cost Airlines	Initiate / Tie up with leading Hospital Chains and State Governments along with the Stakeholders and arrange for a Medical Conclave in the Source Market wherein the Indian Medical Expertise can be showcased
Involve the different Governing Bodies/ Ministries and delegate responsibilities with the PMO for regular updation and status reporting	Research and find acceptability of new / emerging concepts and find out whether it would be feasible in India
Night Entertainment – Increase timings of Pubs and Bars at important tourist locations	
Start huge "Duty Free" Shopping Arenas at Delhi, Kolkata, Mumbai, Bangalore, Hyderabad Airports	

1.   **Background**

India, a land of diversities, has a varied tourism resource base to offer its visitors. Both domestic as well as foreign tourists have thronged various tourist spots that adorn almost every nook and cranny of the country. While some tourist spots have emerged as prime ones, drawing numerous visitors from around the world, it goes without saying that, the country is yet to realize its true potential it has to offer the world. There are umpteen resources that still remain unexplored and in a dynamic world springing up surprises with new variants of tourism every year, India has a lot to offer the world as well.

Foreign tourist arrival in the country has been growing steadily for the past few years. According to Ministry of Tourism, Government of India, foreign exchange earning, which had witnessed a de-growth in the year 2002, recorded a stupendous growth in the year 2003. In spite of the same, the percentage share of India in world tourism receipts remain a meagre 0.69%.

The data trends for last 5 years (*Source: Ministry of Tourism, Lok Sabha Unstarred Question No. 197, dated 25.07.2005*) indicate that major states being visited by the foreign tourists are Tamil Nadu, Maharashtra, Uttar Pradesh, Delhi, West Bengal as well as Rajasthan. Off Late (in the year 2004), Karnataka as well as Andhra Pradesh, Goa as well as Kerala has also entered this *"Achiever"* group of states. These states, have, for last 5 years, recorded arrival of 5 – 10 lakh tourists per annum.

Next in line are the *"Aspirant"* group of states (States recording more than 1 lakh tourist arrivals per annum). These include the likes of Madhya Pradesh, Himachal Pradesh & Haryana.

A few states which are "*Emerging*" as foreign tourist destinations are Uttaranchal, J&K, Gujarat and Orissa.

Other States in the Indian union are yet to make their mark impressively in recording total no. of foreign tourist arrivals per annum. These *"Struggler"* states also have the potential but for one reason or the other have failed to make a mark amongst the foreigners.

A pictorial depiction has been indicated below.

Table 1.1: Achievers, Aspirants, Emerging And Struggler States

Achievers	*Maharashtra*
	Tamil Nadu
	Uttar Pradesh
	Rajasthan
	Delhi
	West Bengal
	Karnataka
	Andhra Pradesh
	Goa
	Kerala
Aspirants	Himachal Pradesh
	Madhya Pradesh
	Haryana
Emerging	Uttaranchal
	Jammu & Kashmir
	Orissa
	Gujarat
Struggler	Bihar
	Pondicherry
	Chandigarh
	Sikkim
	Meghalaya
	Punjab
	Assam
	Andaman & Nicobar Islands
	Jharkhand
	Daman & Diu
	Tripura
	Chhatisgarh
	Lakshadweep
	Nagaland
	Mizoram
	Arunachal Pradesh
	Manipur
	Dadra & Nagar Haveli

Keeping the above trends in mind and realizing the immense potential that India has to offer, the ministry of tourism has embarked on an ambitious plan to promote India to the foreign tourists. The "Incredible India" as well as "Atithi Debo Bhava" campaigns have generated immense success in the recent years. Going ahead with the same it intends to develop an action plan in order to attract more foreign tourists and achieve a target of 15 million foreign tourists in 5 years time, 20 million in 8 years time and 25 million in 10 years time.

Hence, Ministry of Tourism, Government of India has entrusted ACNielsen ORG MARG the task of preparation of the aforesaid action plan which would encompass assessing the current infrastructural as well as institutional facilities that India has to offer.

1.1   Research Aim

Aim of the proposed research would be to develop an action plan to augment flow of foreign tourists visiting India to 15 million in 5 years time, 20 million in 8 years time and 25 million in 10 years time.

1.2   Research Objectives

To achieve the aim of the study, the objectives for the proposed research, was as follows:

i.   Taking stock of the existing amenities (infrastructural as well as legal facilities) in different states of India

ii.   Review of policies at the central as well as the state level in order to promote tourism

iii. Evaluation of marketing as well as promotional strategies at the central as well as at the state level.

iv.   Identification of bottlenecks in existing amenities, policies as well as promotional strategies and devising ways and means to mitigate the same

v.   Develop phase wise action plan drawing clues from all activities undertaken, as indicated above

1.3   Scope of Work

The scope of the proposed research was as follows:

✓ Examining the existing

- Level/ status of infrastructure relating to Air, Road & Rail network, Sea, Hotels and other accommodations
- Policy of integrated development of tourist circuits/ destinations
- Policy of public/ private participation in development of tourism infrastructure
- Facilitation services including visa, customs, immigration etc.
- Tax structure on various tourism related services
- Marketing and promotional activities undertaken to position India as an unique destination including marketing on the web, electronic media, print media, brochures
- Domestic marketing strategies to market domestic tourism products all over the country on the lines of "Incredible India" campaign to attract tourist to different states
- Strategies to promote rural tourism, eco-tourism, health tourism etc.
- Services provided by the service providers and all other related issues
- Set up in Central/ State Government for promotion of Tourism etc.
- Training facilities for tourism related activities

✓ To analyze/ identify bottlenecks in growth/ development of tourism in India

✓ To provide suitable recommendations on all the above aspects as also any other aspect for increasing tourist traffic in the country and taking the present level of foreign tourists from 3 million to 15 million in 5 years time, 20 million in 8 years time and 25 million in 10 years time

The pictorial depiction of the scope of work has been indicated below:-

Assessment of infrastructure like:-
- *Air*
- *Road*
- *Rail*
- *Sea*
- *Hotels/ Accommodation*

Strategy evaluation in following areas
- *Promotion of Niche tourism like eco, medical, rural*
- *Domestic marketing*

Review of policy issues at Centre as well as State level with regard to:-
- *Integrated Development of Tourism infrastructure*
- *Public private participation in development of tourism infrastructure*
- *Taxation*

Evaluation of Promotional initiatives undertaken at the Centre as well as at the State level in :-
- *Web*
- *Electronic Media*
- *Print Media*
- *Brochures*

Evaluation of
- *Type of Services being offered*
- *Training Facilities*
- *Organization structure*

Identification of bottlenecks / lacunae

Developing Phase wise Action Plan to mitigate the lacunae

1.4   Research Design / Methodology

In order to meet the aforesaid study objectives **ACNielsen ORG - MARG** has conducted the research with a blend of secondary research and primary research. Secondary research was carried out in order to accrue desired information, indicated later. The detailed task wise methodology, relevant target groups and tentative information procured from each source have been mentioned below:

Task 1: Literature & Desk Review

The task involved collection, collation and review of foreign tourist arrival information, tourism policy, tax structure, marketing and promotional activities undertaken in the different states of India.

Information Source	Information to be procured	Proposed Output
Publications from Ministry of Tourism and interaction with MOT officials	• National Tourism Policy and its contents, with special reference to promotion of the State towards foreign tourists • Statistics of Foreign tourist arrival in India and contribution of different States • Set up in the Central Government to promote tourism and ways and means undertaken to promote tourism to foreign nationals	• Procuring preliminary information about the National Tourism policy • Earmarking **Primary**, **Secondary** as well as **Tertiary** thrust areas to attract foreign tourists

Output of the Desk / Secondary Research

The prime output from the secondary research was to prepare a checklist – State wise and accumulate accrued information in relation to different head/ parameters as indicated below.

Table 1.2: Checklist format

Parameters	State					
	State 1	State 2	State 3	State 4	State 5	State 6
Resource Base (Primary)						
Natural Environment						
Culture & Heritage						
Towns & Villages						
Outdoor Activity						
Resource Base (Secondary)						
Festivals/ Events						
Shopping						
Entertainment						
Visitor Attractions						
Tourist Services & Facilities						
Physical Infrastructure						
Accommodation facilities						
Accessibility/ Transport mode						
Services/ Facilities						
Enabling Environment						
Laws/ Regulations						
Marketing						
Finance/ Investment						
Training & Education						
Sector Management						
Environmental Management						
Community involvement						
Institutional Arrangement						
Policies/ Strategy						

Task 2: Primary Research

The primary research would encompass collection of requisite information from the different sources. The pictorial depiction has been presented below.

Ministry of Finance	Physical Visits	State Depts. of Tourism
Enabling Environment	**Primary Resource Base** **Secondary Resource Base** **Tourist Services & facilities**	**Enabling Environment** **Sector Management**

Foreign Tourists

Exit/ entry points
Destinations

Checklist Finalisation

Tourist facilities and connectivity

Ministry of Civil Aviation	Ministry of Railways	Ministry of Surface Transport

Environment

Ministry of External Affairs

The information to be procured from each of the above sources and the respective outputs have been depicted in the ensuing pages.

Information Source	Information to be procured	Proposed Output

State Department of Tourism	• Nuances in the state policy as well as strategy for tourism development w.r.t following
	  ✓ *to attract more foreign tourists*
	  ✓ *public/ private participation on development of tourism infrastructure*
	  ✓ *on integrated tourism/ circuit development*
	  ✓ *to promote domestic tourism products to the foreigners*
	  ✓ *to promote niche tourism products*
	• List of important tourist locations in the State and ways and means (marketing & promotional measures) adopted to promote the same
	• Tax structure on various tourism related properties
	• State tourism owned properties
	• Organisation structure to promote tourism in the State
	• Investment scenario in the State for promoting tourism
		• To procure an overview of the State policy on tourism with special reference to attract foreign tourists to the State
		• To figure out "thrust area / USP" identified by the State to attract foreign tourists. (viz. key locations)
		• Investment climate in the area of tourism promotion in the State.
		• Steps taken by the State Government to mitigate infrastructural, legal, financial bottlenecks to promote tourism

Ministry of Finance	• Taxation structure w.r.t. different tourism related products	• Getting an idea about the taxation on existing and proposed tourism related products
Ministry of External Affairs	• Immigration norms and compliances – current and future	• Present and future facilitation norms
Ministry of Civil Aviation/ Airport Authority of India	• Airport infrastructure • Connectivity issues	• Present and future connectivity issues to the prime tourist attractions
Ministry of Railways	• Connectivity issues to prime spots • Proposed discounts to encourage foreign travel	
Ministry of Surface Transport/ NHAI	• Connectivity issues – Current and future	

Information Source	Information to be procured	Proposed Output
Physical visit to the prime locations, private accommodation unit owners, food service industry and tour operators	• Status of Infrastructural amenities (*Connectivity issues*) w.r.t the following ✓ *Road* ✓ *Rail* ✓ *Air* • Infrastructural amenities w.r.t Accommodation facilities • Connectivity (intra and Inter state) amongst prime tourist destinations and amenities available • Shopping and Entertainment facilities available • Training and Capacity building measures	• Assessment of status of primary and secondary resource base required to promote tourism within the State and its linkage with other tourism resources in the adjoining states.

Immensely experienced research professionals of **ACNielsen ORG-MARG** carried out the primary research work.

Task 3: Finalization of Checklist

The checklist prepared after the desk research was filled up from the information collated from primary research.

Task 4: Identification of bottlenecks and measures for mitigation

The aforesaid activity enabled identification of bottlenecks and devising methods to solve those impediments. It also helped in prioritizing action plans (indicated in the following steps) to augment flow of foreign tourists in different earmarked states.

Task 5: Preparation of Short Term Action Plan (Duration - 5 years)

Under this task, a short term action plan was prepared. The prime activity under this was to focus upon the "Achiever" group of locations, streamlining bottlenecks and focus on a comprehensive plan to augment number of foreign tourists.

Task 6: Preparation of Medium Term Action Plan (Duration - 8 years)

A medium term action plan was prepared encompassing locations in both "Achiever" as well as "Aspirant" States. The prime idea of this plan was to help the "Achiever" states maintain their position. This was done by addressing lacunae in the short term action plan and lessons learnt from the same. This plan would also focus upon the locations of "Aspirant" states with an aim to elevate then to the status of "Achievers".

Task 7: Preparation of Long Term Action Plan (Duration - 10 years)

A long term action plan was prepared encompassing locations in Achievers, Aspirants as well as Emerging States. The overall idea would be to phase out priorities to enable India achieve targeted foreign tourists. Identification of new tourism products for the "Emerging" as well as "Aspirant" states would be the buzzword for this plan.

Task 8: Report Writing/ Presentation preparation

Task 8 would encompass preparation of Report.

Chapter Two

Current Status of Tourism Industry worldwide

2.1.   Overview

The trends in World Tourism indicate a momentous boost in past couple of years. The travelers across the world seem to have shaken off the jitters from terrorist attacks, natural disasters, health scares, oil price rise, exchange rate fluctuations, economic as well as political uncertainties that rocked the various destinations. The chapter intends to take a peek on the ongoing global trends in the world of tourism and elucidates the trends set by some leading countries to attract tourists.

2.2.   Global Tourism Trends upto the year 2005

2.2.1.   Global Tourist Arrivals

The international tourist arrivals for the year 2005 has exceeded 800 million. Tourist arrival across the world recorded a growth of approx 42 million compared to the previous year. The growth was momentous in Europe with 18 million more arrivals. 11 million additional tourist arrivals were recorded in Asia – Pacific region. Americas recorded a growth of approx. 7 million arrivals, while 3 million more tourists poured in Africa and about 2 million more thronged the Middle East. The trends indicate the fact that global tourism has indeed entered into a phase of consolidation following the year of spanking growth in the year 2004. The figure below depicts the fact more vividly.

Figure 2.1: Global Tourist Arrivals
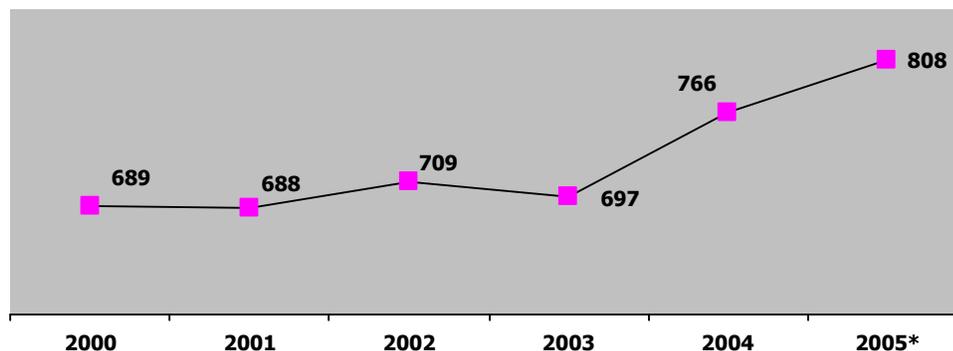
All Figures in Million   *Source: World Tourism Organization*

Trends in different continents indicate that Europe has the highest contribution in the total tourist arrivals and the trend has primarily been an upward trend across the years under consideration. Asia - Pacific nations have also maintained a tourist inflow in accordance with the European Countries. Americas have started their quest of reviving their mantle, while Africa and the Middle East go hand in hand as far as the Tourist arrivals are concerned. It can further be observed from the figures that arrivals in Asia – Pacific has outgrown arrivals in 3 other continents/ destinations (that of America, Africa and Middle East).

Figure 2.2: Global Tourist Arrivals – Share of Continents

	2000	2001	2002	2003	2004	2005*
Europe	396.2	395.8	407.4	408.6	425.6	443.9
Asia and the Pacific	111.4	116.6	126.1	114.2	145.4	156.2
Americas	128.2	122.2	116.7	113.1	125.8	133.1
Africa	28.2	28.9	29.5	30.7	33.3	36.7
Middle East	25.2	25	29.2	30	35.9	38.4
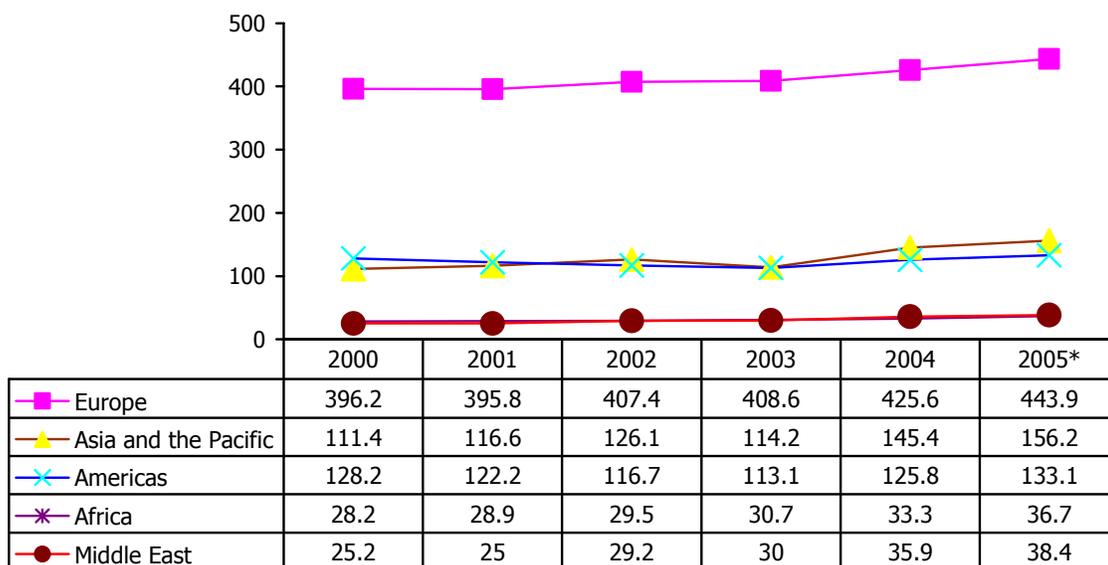
All Figures in Million   *Source: World Tourism Organization*

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A further drill down in to the different sub - regions indicates a distinctive trend. A Region wise analysis has been depicted below.

A.   Europe

As indicated above, Europe is the largest contributor to the total tourist arrivals in the world as understood from the published figures of world tourism organization. The tourist arrivals for the continent on the overall level has grown at a CAGR of 2.3% for the period 2000 – 2006.

Figure 2.3: Tourist Arrivals – Europe and Sub Regions

	2000	2001	2002	2003	2004	2005*
Northern Europe	44.6	42.3	43.8	44.5	48.4	51.8
Western Europe	139.7	135.8	138	136.1	138.7	141.1
Central/Eastern Europe	71.2	74	78.1	80.3	89.1	92.3
Southern/Mediterranean Europe	140.8	143.7	147.6	147.7	149.5	158.8
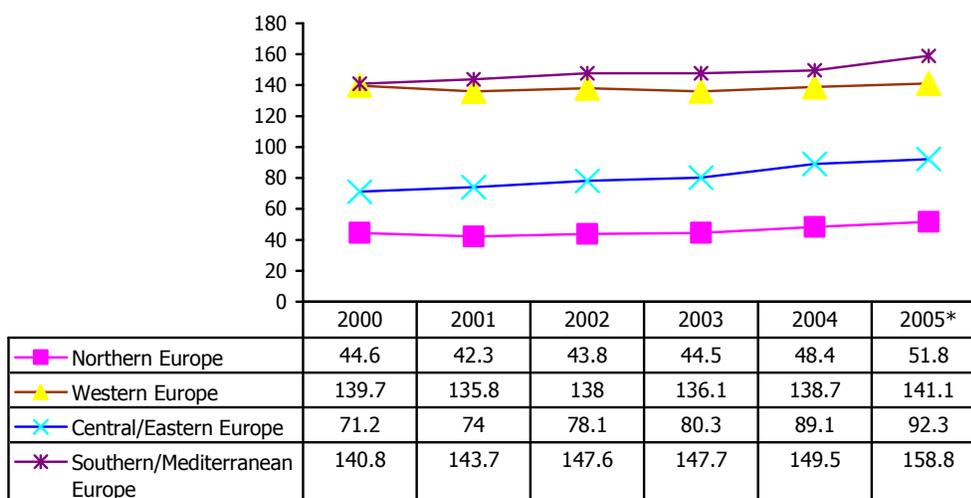
All Figures in Million   *Source: World Tourism Organization*

A zonal analysis indicates that, Southern and Western Europe continue to the highest visited destination across the world. Central/ Eastern as well as Northern European nations are on fast track growth and have started contributing significantly in last few years.

B.   Asia - Pacific

Tourist arrival in the region has grown at a CAGR of 7% for the period 2000 – 2005.

Figure 2.4: Tourist Arrivals – Asia Pacific Sub Regions
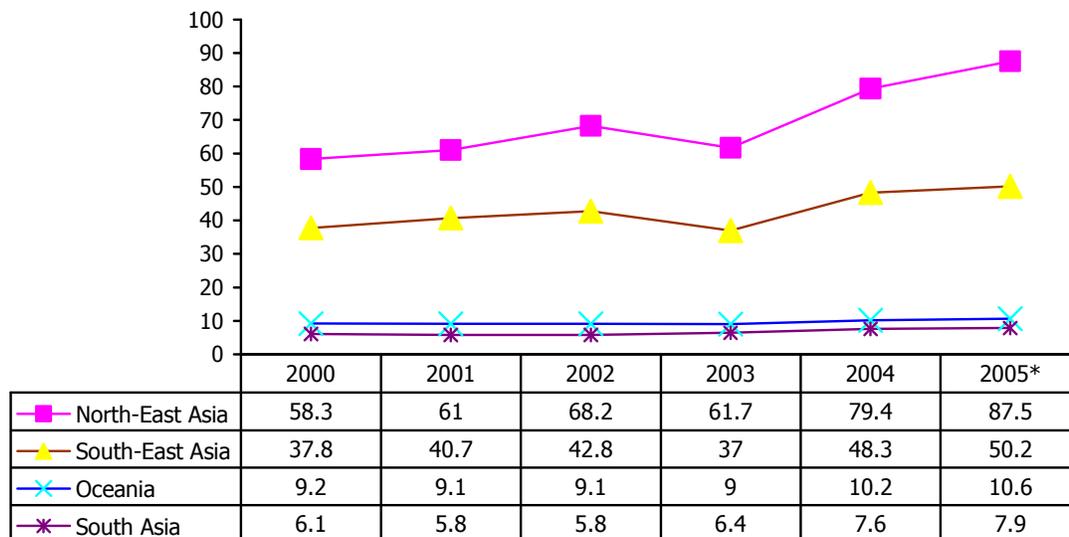
	2000	2001	2002	2003	2004	2005*
North-East Asia	58.3	61	68.2	61.7	79.4	87.5
South-East Asia	37.8	40.7	42.8	37	48.3	50.2
Oceania	9.2	9.1	9.1	9	10.2	10.6
South Asia	6.1	5.8	5.8	6.4	7.6	7.9

All Figures in Million   *Source: World Tourism Organization*

A break up of regions by various sub zones have indicated that the prime zonal contributions to the region comes from North East as well as South East Asian nations, while Oceania and South Asia is yet to contribute significantly to the surging tourist inflow in the region. The CAGR figures for the period 2000-2006 indicate that inflow in North East and South East Asia has been stupendous. South Asia (CAGR of 5.3%) is below Oceania (which grew at a CAGR of 2.3%) in terms of total contribution to tourist arrival in the region but the former has witnessed a prolific growth in the rate of tourist arrival for the period 2000 – 2005, as understood from the figures above.

C. Americas

Tourist arrival in the region has grown at a CAGR of 0.8% for the 2000-05 period.

Figure 2.5: Tourist Arrivals – Americas and Sub Regions
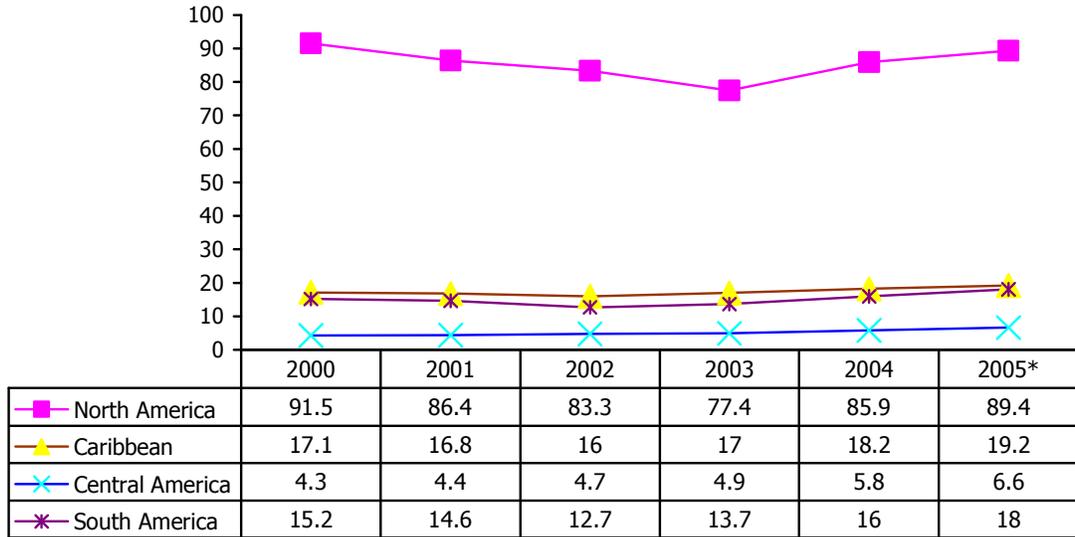
	2000	2001	2002	2003	2004	2005*
North America	91.5	86.4	83.3	77.4	85.9	89.4
Caribbean	17.1	16.8	16	17	18.2	19.2
Central America	4.3	4.4	4.7	4.9	5.8	6.6
South America	15.2	14.6	12.7	13.7	16	18

All Figures in Million   *Source: World Tourism Organization*

A break up of regions by various sub zones have indicated that the prime zonal contributions to the region comes from North American nations. The CAGR figures indicate that the growth in those countries for the period under consideration has been pretty dismal at -0.5%. Most promising growth has been observed amongst the Central American nations, which in spite of a meager contribution has outgrown growth in arrivals for all other sub regions.

D. Africa

Africa has the 2nd highest rate of growth (at a CAGR of 5.4%) for the year 2000-2005

Figure 2.6: Tourist Arrivals – Africa and Sub Regions

	2000	2001	2002	2003	2004	2005*
North Africa	10.2	10.7	10.4	11.1	12.8	13.6
Subsaharan Africa	18	18.2	19.1	19.6	20.5	23.1
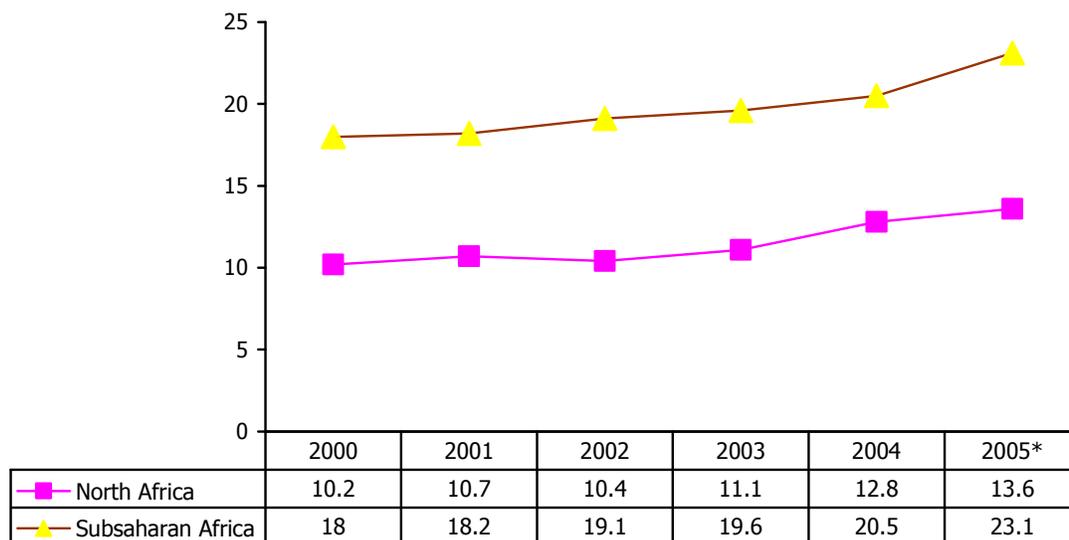
All Figures in Million   *Source: World Tourism Organization*

Sub Saharan Africa has a higher contribution than the Northern African nations, but the growth rate for both the sub regions is almost propelling the region forward.

E. Middle East

The WTO figures indicate an almost equivalent traffic flow for the Miiddle East region as compared to total Africa, but an even more impressive growth rate (at a CAGR of 8.8% for 2000 -05 period). The figures indicate that Middle East on its own has emerged as one of the promising destinations of the world.

Figure 2.7: Tourist Arrivals – Middle East
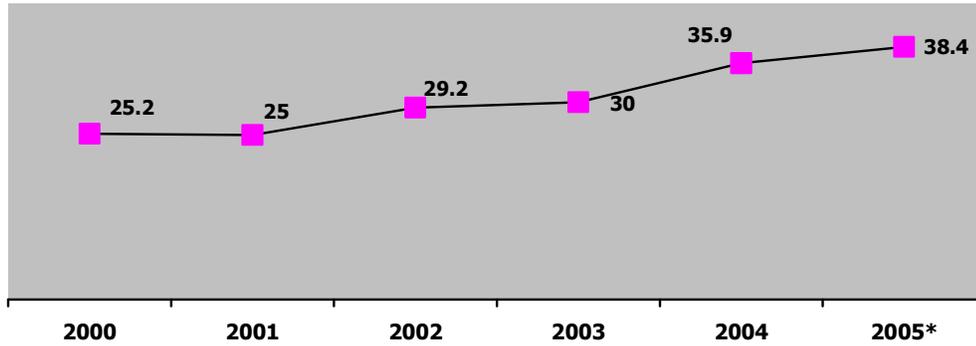
All Figures in Million   *Source: World Tourism Organization*

2.2.2. Seasonality of Tourist Traffic Flow

The seasonality of tourist traffic flow across the world indicates the trend as illustrated in the figure below.

Figure 2.8: Seasonality of Tourist Arrivals – Middle East
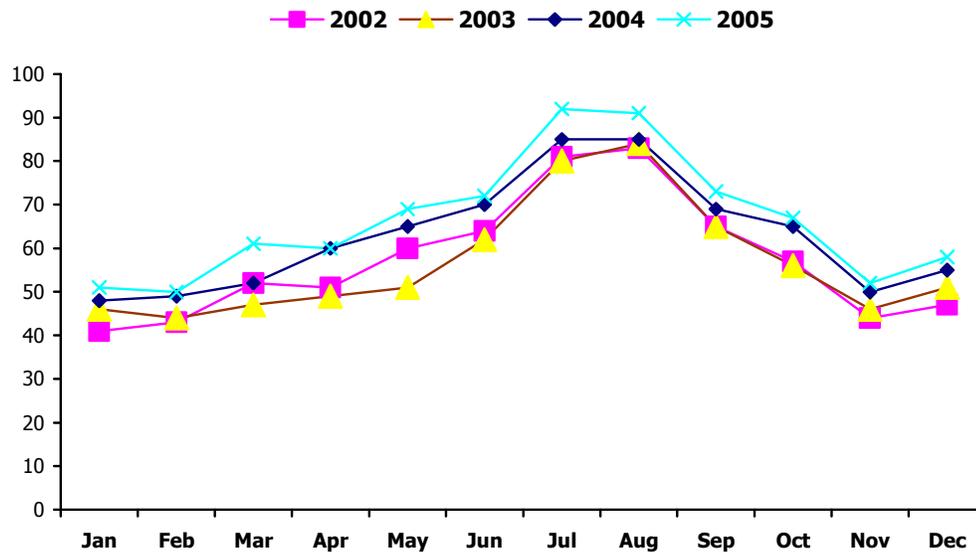
All Figures in Million   *Source: World Tourism Organization*

The figure above indicates an overall higher traffic flow for the year 2005 compared to the years 2002-2004. The peak period of traffic flow though remains the July – August period.

2.3.   Top destinations across the world

The top destinations across the world have been judged on the basis of international tourist arrivals and international tourism receipts. A ranking based on the aforesaid two parameters indicate an almost similar scenario with nine of the top 10 destinations appearing in both the lists. The table below further elaborates the fact.

Table 2.1 : Tourist Arrivals and Tourism Receipts in Top 10 Global Destinations

Tourist Arrivals (in Million)			Tourism Receipts (in US$ Billion)		
Destinations	2004	2005	Destinations	2004	2005
France	75.1	76	USA	74.5	81.7
Spain	52.4	55.6	Spain	45.2	47.9
USA	46.1	49.4	France	40.8	42.3
China	41.8	46.8	Italy	35.7	35.4
Italy	37.1	36.5	UK	28.2	30.4
UK	27.8	30	China	25.7	29.3
Mexico	20.6	21.9	Germany	27.7	29.2
Germany	20.1	21.5	Turkey	15.9	18.2
Turkey	16.8	20.3	Austria	15.3	15.5
Austria	19.4	20	Australia	13.6	14.9

Source : World Tourism Organisation

The aforesaid table indicates the fact that France, Spain and USA are the top 3 destinations in terms of both Tourist arrivals as well as Tourism receipts. While France and USA interchange the top spots in terms of tourist arrivals and tourism receipts respectively, Spain is firmly rooted in the 2nd position. Australia and Mexico replace each other when the two indicators are taken up individually. While Mexico attracts more tourists, Australia earns more receipts from the visiting tourists.

As far as the Tourist arrivals are concerned, nearly all major countries have witnessed boom in tourist traffic arrivals in the year 2005 compared to the previous year, with the exception of Italy, which has observed a de-growth for the period. Prolific growth figures have been observed for Turkey, China, UK, US, Germany Mexico and Spain, which have recorded a percentage change of above 6 points during the year 2005.

The tourism receipts unfold a different story, except for the top 3 spots as it has been described earlier. Higher percentage change in Tourism Receipts have been observed for Turkey, China, USA, Australia, UK all of whom have recorded a growth over and above 7 percentage points for the year 2005 over the year 2004.

2.4.   Case Study of few countries which have set examples in recent times

A few countries in recent times have started attracting more and more tourists and introduced them to the legacies, heritage, wilderness, flora and fauna as well as the various new modes that the world of tourism has to offer. An overview of the major nations across the world and how they have continued to attract the tourists have been indicated in the ensuing pages.

2.4.1.   U.S.A.

U.S.A. is located in North America and is one of the largest countries in the world in terms of sheer size. It is is one of the economically developed countries in the in the world and. has world class infrastructural faciltites; its cities centers are of global trade and business.

Tourism in U.S.A.
Industry Status
The country contributes around 25.5%% to the global tourism market and the tourism indsutry contributes around 3.9% to the country's GDP. U.S.A. ranked number 3 in tourist arrivals worlwide in 2004, receiving around 46 million tourists.

Tourism Destinations/Resources
There are a multitude of destinations in U.S.A, some of the major attractions are:

- Statue of Liberty in New York City
- The monuments, memorials and museums of the country's capital of Washington, D.C.
- Mount Rushmore National Monument in South Dakota
- The Rocky Mountains

Plate 2.4.1.1: Mount Rushmore, South Dakota

Plate 2.4.1.2: The Rocky Mountains

- The wine regions of Napa and Sonoma in California
- Hawaiian Islands - The islands are famous for their natural beauty and tribal culture.
- Alaska – The sate of Alaska is situated near the arctic and is rich in natural resources. The vast wilderness of the state and its national parks are popular with nature lovers.
- Disney Land Amusement Park in Orlando

Tourism Products

The key tourism products promoted by country are:

- Nature and Wildlife –The country is rich in natural resources and has wide variety of natural attractions (such as beaches, mountains, national parks).and the country promotes its rich nature and wildlife as one of the key products in its tourism strategy and campaign
- Adventure - One of the main attractions of the country are the various avenues of adventure activities it can provide to the tourists and it is one of the products in its tourism strategy and campaign.
- Leisure – The country promotes the cities   as leisure destinations having the best leisure options and cosmopolitan culture.
- Culture and Heritage – The multicultural heritage of the country is one of its key tourism products.

Promotional Modes

The promotional strategy is based on promoting U.S.A. as a multicultural one stop destination. The key promotional mode adopted for tourism promotion is the media (electronic and print). The country has developed specialized promotional campaigns for the different key target markets.

2.4.2.   Canada

Canada is the world's second-largest country by total area, occupying most of northern North America. Extending from the Atlantic Ocean to the Pacific Ocean and northward into the Arctic Ocean, Canada shares land borders with the United States to the south and to the northwest. Owing to its rich natural resources and strong economy, Canada poses as an attractive destination for internatonal travelers.

Plate 2.4.2.1: Toronto City Skyline

Tourism in Canada
Industry Status
Canada's contribution to global tourism market is around 2.9% and the total contribution of the tourism industry to the country's GDP is around 3.5%.

Tourism Destinations/Resources
The main attractions of the country are the rich natural resources. Canda is located very near to the arctic and has a unique climate and eco-system. Moreover, due to its economic wealth, the country's cities are centres of global trade and commerce. The key destinations of Canda are:
- Niagra Falls – The part of Niagra Falls which is in canadian territory is more popularly known as horse shoe falls and is one of the most visited attractions of the country.
- Cities (especially Toronto, Vancouver and Montreal) – The cities are a major attraction for their cosmopolitan culture offering the best of leisure options to the travelers.

Plate 2.4.2.2: *Niagra Falls*

Tourism Products

The key tourism products promoted by the country are:

Leisure – The cities offer the best of leisure options and is one of the key tourism products of the country.

Cruise – The vast coastline coupled with strong cruise infrastructural facilities has made cruise tourism one of the key products of the country.

MICE – The country owing to its strong infrastructural facitlties offers MICE tourism as one of the key products in its cities.

Promotional Modes

The tourism promotion strategy and campaign of the country is handled by a central agency called" Canadian Tourism Commission". The commission coordinates all activities of the tourism industry and has developed partnerships with the various sectors of the industry. The promotional strategy is based on promoting each state of the country as an individual entity. The key promotional mode adopted for tourism promotion is the media (electronic and print).

2.4.3. France

France is one of the most prosperous countries in Europe having a distinct culture and heritage. The country is also rich in natural beauty and has a wide range of natural resources which attract travelers around the world.

Plate 2.4.3.1: City of Paris, France

Tourism in France
Industry status
The tourism industry in France is a very large sector of the economy. The country's contribution to global tourism market is around 5.2% and the tourism sector contributes around 4.4% to the country's GDP.

Tourism Destinations/Resources
The natural beauty of the country coupled with its distinct culture are the main tourism resources of France. The popular destinations in the country are:

- Mont Saint Michael - Mont Saint-Michel is a small rocky tidal island in Normandy, roughly one kilometre from the north coast of France It is home to the unusual Benedictine Abbey and steepled church (built between the 11th and 16th. It is the most visited tourist site in France.
- Martinique - The destination is popular for its unique culture which is a mix of French and African heritage. It is also popular for its natural beauty especially beaches.
- Paris – Paris is the capital of France and is the cultural and economic hub of the country. It is one of the most popular destinations for international travelers.

Plate 2.4.3.2: Paris city coastline

- Palace of Versailles – The palace of Versailles is a royal château, in Versailles, France built by Louis XIV around 1660 and is famous for its architecture and historical significance.

Plate 2.4.3.3: The Palace of Versailles

- Cannes – Cannes is a city in southern France and is famous worldwide for International Film festival which is held every year. People from all round the world visit Cannes for the film festival
- Guadeloupe – The destination offers unspoiled natural beauty to the travelers. The beaches and tropical forests are the major attractions of Guadeloupe.
- Saint-Martin and Saint-Bartholomew – This destination is famous for its beaches and water sports options. It is one of the prime locations for yachting enthusiasts.
- French Guyana – French Guyana is famous for its natural beauty especially the amazon forests.
- Saint-Pierre and Miquelon – The destination is popular for its beaches.
- Reunion - The destination is popular for its unspoiled natural beauty especially beaches, coral reefs, lush vegetation and volcanoes.

- Mayotte –The destination is popular for its natural beauty especially its beaches, lagoon and lush vegetation. I
- French Alps – The French alps are famous for ski resorts which are visited by travelers all over the world.

Tourism Products

The key tourism products promoted by country are:

- Arts and Culture –One of the key products being promoted by the country is its rich arts and culture.
- Nature – The country has a vast coastline and a number of islands rich in natural beauty and the country promotes its natural resources as one of the key products in its tourism campaign
- Wine and Cuisine – The country is famous for its wines and its distinct cuisine which is one of the prime products in its tourism campaign.

Promotional Modes

The promotional strategy of the country is based on the image of France as the cultural hub of Europe, abounding in natural beauty. The major promotional mode are campaigns in the electronic and print media.

2.4.4.   Spain

Spain is located in Western Europe and is one of the few countries having constitutional monarchy. It has distinct cultural heritage and is famous for its colonial history.

Tourism in Spain
Industry Status
Spain attracts tourists from all over the world. In terms of tourist arrivals , the country ranked number 2 worldwide in 2004, recieving around 53 million tourists. The country's contribution to global tourism market is around 3.9% and the tourism industry contributes 6.9% to the country's GDP.

Tourism Destinations/Resources
The rich cultural heritage of the country coupled with its natural beauty are its major attractions. The main destinations in the country are:

- Natural Parks – The country is rich in natural resources and has number of national parks which are popular destinations for nature lovers.
- World Heritage Cities –The country has a long history dating back to pre-roman era and there are a number of heritage cities which are popular destinations.
- Great City Destinations – The cities of Barcelona and Madrid offer the international travelers the best of leisure options and cosmopolitan experience and are popular destinations.
- Coasts – Spain has a long coastline and has a number of beaches which are popular with international tourists.
- Autonomous Regions – The country has number of autonomous regions which have their own distinct culture and ethic identity and are popular destinations.

Tourism Products
The key tourism products promoted by the country are:

- Culture and Heritage – The unique culture and heritage is the prime tourism product of the country.
- Leisure – The cities offer the best of leisure options and it is one of the key tourism products being offered by the country.

Promotional Modes
The promotional strategy is focused on promoting the image of Spain as a country having a multitude of destinations, cultures and attractions. The tagline of the promotional campaign of the country is "A thousand places to discover. A thousand journeys to plan" The major promotional mode are campaigns in the electronic and print media. Also, the country has come out with specialized promotional campaigns for its key target markets.

2.4.5.   China

China, officially known as People's Republic of China is one of the largest countries in Asia. It has a rich culture heritage which is a blend of ancient civilizations dating back to six millennia. Its unique history and culture makes it one of the most attractive destinations for international travelers.

Tourism in China
Industry Status
The country's contribution to global tourism market is around 5.5% and the total contribution of tourism industry to the country's GDP is around 2.9%. In terms of tourist arrivals, China ranked 4 worldwide in 2004 recieving around 41 million tourists.

Tourism Destinations/Resources
The culture and heritage of the country are its prime attractions. The popular destinations in the country are:

- Beijing - Beijing is located in the North and is China's capital and its most modern city. This city is home to over 10 million people, while remaining steeped in China's rich, royal past. China's two final dynasties (1368-1911) and 26 emperors have bestowed Beijing with the richest dynastic heritage in the world. Beijing is home to cultural display of artistic and historical artifacts in more than 50 museums and cultural centers offer fascinating demonstrations of century's old art and craft making.
- Shanghai - Overlooking the Huangpu River, Shanghai is home to 14 million people and is one of China's largest, most cosmopolitan cities. It is a beautiful city mixing traditional Chinese and 21st century architecture.

Plate 2.4.5.1: Shanghai city skyline

- Guilin - Guilin, a cultural city with a history of over 2,000 years, is world famous for its serene landscapes, mysterious limestone formations, mist covered hills and bamboo groves.
- Xiang - Xi'an city is home of the world-famous life-size Terra Cotta Army, unearthed in 1974 and is one of the major attractions for international tourists.
- Forbidden City - The Forbidden City, with its landscaped gardens and many buildings whose 9,000 rooms contain furniture and works of art and was the seat of supreme power for over five centuries during the Ming and Qing Dynasties.

Plate 2.4.5.2: Forbidden City

- Tiananmen Square - Tiananmen Square is the large plaza near the center of Beijing has great cultural significance as a symbol because it was the site of several key events in Chinese history
- The Great Wall of China – The Great Wall of China, one of the greatest wonders of the world, was enlisted in the World Heritage by UNESCO in 1987. The Great Wall winds up and down across deserts, grasslands, mountains and plateaus stretching approximately 6,700 kilometers (4,163 miles) from east to west of China. With a history of more than 2000 years, some of the section of the great wall are now in ruins or even entirely disappeared. However, it is still one of the most appealing attractions all around the world owing to its architectural grandeur and historical significance.
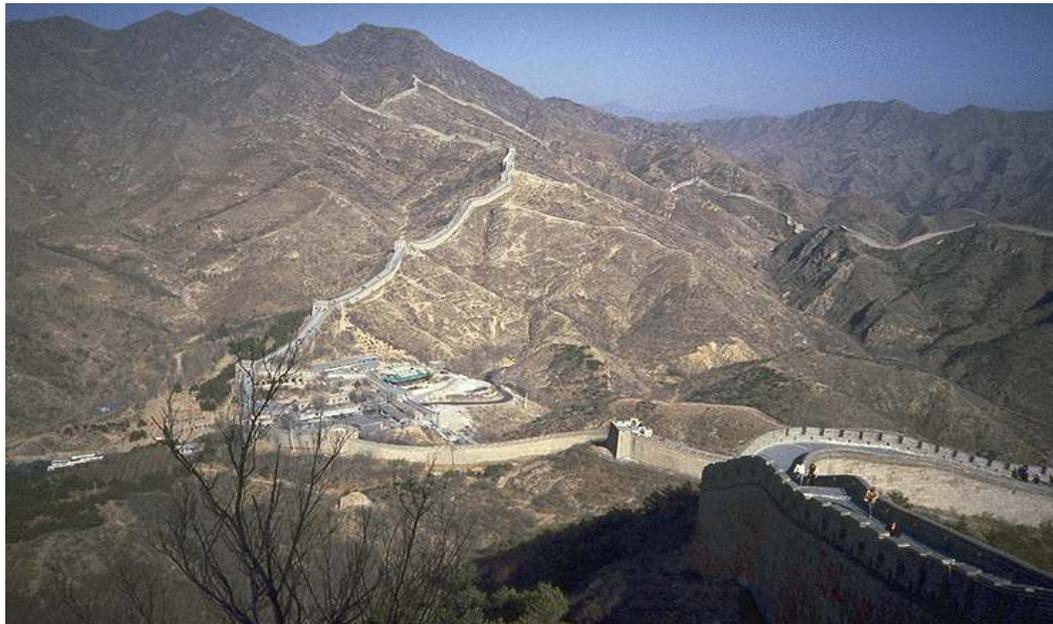
Plate 2.4.5.3:The Great Wall of China

- The city of Lhasa – Lhasa is famous for its Tibetan culture and heritage and is one of key attractions of the country.

Tourism Products

They key tourism products promoted by the country are:

Culture and Heritage – The rich culture and heritage is one of the prime attractions for international tourists and the country promotes its distinct culture as the prime tourism product in its promotion strategy and campaign.

MICE – The country has developed infrastructural facilities of global standards in its cities and MICE tourism is being promoted by the country in a major way.

Promotional Modes

China's promotional strategy and campaign is based on the image of the country as a culturally unique destination which at the same time has infrastructural facilities of global standards. The promotional campaign is through various communication modes such as electronic and print media. One of the innovative marketing strategies is incorporating the promotion of Beijing Olymics (to be held in 2008) within the tourism campaigns.

2.4.6.   Macau

Macau is is a small territory on the southern coast of China, which was a portueguese colony prior to being handed over to China. Due to its colonial heritage, it has developed a distinct culture and is a popular tourist destination.

Tourism in Macau
Industry Status

The tourism industry in Macau is the biggest contributer to its economy.. The country's contribution to global tourism market is around 0.2% and the tourism sector contributes around 34.8% to the country's GDP. The country recieved around 8.3 million tourists in 2004 and ranked number 22 in tourist arrivals worldwide[1].

Tourism Destinations/Resources

The major tourism resources of Macau are the historical Chinese and Portuguese world-heritage relics and its gambling industry and casinos.

Plate 2.4.6.1: City Centre, Macau

Tourism Products

The key tourism products promoted by country are:

- Culture and Heritage – The country's colonial past and its oriental heritage is one of the prime attractions for tourists and is one of the key tourism products being promoted by the country.
- Leisure – The country offers multitude of leisure options for the tourists and leisure tourism is a major component of the promotional strategy and campaigns.
- MICE - MICE tourism is one of the key products in Macau's tourism campaign.

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[1] Source: World Tourism Organization

Promotional Modes

The promotional strategy of Macau is based on projecting the country as the destination having a rich past and exciting present. Besides the conventional modes of promotion through various communication media, the country has come out with innovative promotional strategies such as organizing contests and events specially designed for tourists.

2.4.7.   Australia

Australia, officially the Commonwealth of Australia, is a country in the Southern Hemisphere comprising the mainland of the world's smallest continent and a number of islands in the Southern, Indian, and Pacific Oceans.   The country owing to its geographical isolation from rest of the continents has an exceptional range of flora and fauna with more than 80 percent of mammals, frogs, reptiles and flowering plants found nowhere else in the world. In terms of absolute size, the country ranks at number 11 worldwide. One of the key economic drivers of the country's progress is the tourism industry.

Plate 2.4.7.1: Sydney Harbour

Tourism In Australia
Industry status
The tourism industry in Australia is a very large sector of the economy. According to a recent report on the industry by the Australian government, the tourism industry represents 4.7% of Australia's GDP, is responsible for 11.2% of Australia's export earnings, and employs 6% of the workforce.

Tourism Destinations/Resources
The natural beauty of the country coupled with highly develeopd cities are the main resources of Australia. The popular destinations in the country are:

- Uluru (Ayers Rock) - Uluru, also known as Ayers Rock, is a large sandstone rock formation in central Australia, in the Northern Territory. It is located in Uluru-Kata Tjuta National Park. Uluru is sacred to the Pitjantjatjara and Yankunytjatjara, the Aboriginal people of the area, and has many springs, waterholes, rock caves and ancient paintings. It is listed as a World Heritage Area for both its cultural and natural values.

Plate 2.4.7.2: Ayers Rock

- Cairns, known as the gate to the Great Barrier Reef - Cairns is a popular travel destination for foreign tourists because of its tropical climate and proximity to many attractions. The Great Barrier Reef is only one-and-a-half hours away by boat. The Daintree National Park and Cape Tribulation, about 130km north of Cairns, are popular areas for experiencing a tropical rainforest. It is also a starting point for people wanting to explore Cooktown, Cape York Peninsula, and the Atherton Tableland.The city has used its natural surrounds to its advantage with the construction of several small theme parks for tourists.

- Kakadu National Park - Kakadu National Park is in the Northern Territory of Australia and is famous for its unique natural attractions and aboriginal culture.

- The Great Barrier Reef - The Great Barrier Reef is the world's largest coral reef system, composed of roughly 3,000 individual reefs and 900 islands, that stretch for 2,600 kilometres (1,616 mi). The reef is located in the Coral Sea, off the coast of Queensland in north-east Australia. A large part of the reef is protected by the Great Barrier Reef Marine Park.

Plate 2.4.7.3: The Great Barrier Reef

- The beaches, particularly those of the Gold Coast – The beaches of australia are famous for their pristine beauty and are a major attraction for the international traveles.

- Sydney, particularly the Sydney Opera House and the Sydney Harbour Bridge – Sydney is the most populous city in Australia has a unique cosmopolitan culture. It has number of natural and man-made attractions, the prominent among them being the Sydney Opera House and the Sydney Harbour Bridge.
- Melbourne, including the Melbourne Cricket Ground – Mebourne is the state capital of Australia and is most famous for the Melbourne Cricket Ground.
- Tasmanian wilderness and historical sites – The tasmanian wilderness more popularly referred to as the "outback" is popular for its vast expanse of wilderness and uninhabited country. There are a number of aboriginal historical sites in the outback.

Tourism Products

The key tourism products promoted by country are:

- Nature and Wildlife - The country's unique flora and fauna is one of the main attractions for international tourists and the country promotes its distinct and exclusive nature and wildlife as one of the key products in its tourism strategy and campaign
- Heritage – The country has a unique aboriginal culture and heritage and promotes the ancient heritage sites for tourist
- Leisure – The country promotes the cities as leisure destinations having the best leisure options for international travelers.
- Adventure – One of the main attractions of the country are the various avenues of adventure activities it can provide to the tourists and it is one of the products in its tourism strategy and campaign.
- MICE – The tourism strategy promotes MICE tourism in the cities especially in Sydney, Melbourne, Adelaide and Canberra which are promoted as global cities having the best of infrastructure facilities.

Promotional Modes

Australia's international tourism strategy have largely centred around the image of Australia as a wild, expansive, almost uninhabited continent, with all manner of exotic scenery and wildlife, endless beaches, large coastal cities and friendly, relaxed locals. The tourism ministry of Australia initiated a highly successful campaign in 2006 which projects the image of the country as a wild and wonderful destinaton waiting to be explored.

The promotional campaign was undertaken through various communication modes such as electronic and print media. The promotional campaign also featrues some innovative strategies such as organizing participatory contests for target customers (e.g. Short film contest on Australia which involves winning a prize of trip to Australia).

2.4.8.   Malaysia

Malaysia is a federation of 13 states in Southeast Asia, formed in 1963. The country is a mix of various cultures and ethnic groups. The tourism industry is one of the major economic drivers of Malaysia.

Tourism in Malaysia
Industry Status
The tourism industry in Malaysia is a very large sector of the economy. The country's contribution to global tourism market is around 0.5% and the tourism sector contributes around 4.6% to the country's GDP. Malaysia received around 15 million tourists and ranked number 13 worldwide in tourist arrivals in the year 2004[2]

Tourism Destinations/Resources
The main attraction of the country is its multicultural heritage and rich natural resources. The prime destinations of Thailand are:

- Kuala Lumpur – It is the capital city of the country and the prime attraction for visitors. The city has state of art infrastructural facilities and cosmopolitan culture making it an attractive destination internationally.

Plate 2.4.8.1: Petronas towers, Kuala Lumpur

- Melaka – The historical attractions of Melaka make it a popular destination.
- Langkawi Islands – The natural beauty of the islands make it a popular destination.

Tourism Products

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[2] Source: World Tourism Organization

The key tourism products promoted by country are:

- Culture and Heritage – The multicultural heritage of the country is one of its key tourism products.
- MICE – The country promotes MICE tourism in a big way offering its state of the art infrstructural faciltites and leisure options.
- Islands – The rich coastal flora and fauna of the country is promoted as a distinct tourism product.
- Adventure – The country offers adventure tourism to the international travelers

Promotional Modes

The promotional strategy of the country focuses on the multicultural heritage of the country. The 'Malaysia, Truly Asia' campaign carved a niche in the tourism market by positioning Malaysia as a multi-cultural one-stop destination. The campaign highlights the country's rich blend of cultures along with its natural attractions. The major promotional modes are campaigns in the electronic and print media as also visibility creation through trade shows and promotions. The tourism ministry also runs a media center which constantly updates new stories, press releases and facts to the media.

2.4.9. Singapore

Singapore, is an island city-state and the smallest country in Southeast Asia. It is a popular destination for tourists worlwide.

Tourism in Singapore

Industry Status

Singapore is a popular travel destination, making tourism one of its largest industries. In 2004, a total of 5.7million tourists visited Singapore[3].

Tourism Destinations/Resources

The major attraction of Singapore is its cultural diversity that reflects almost 200 years of colonial history with immigrant cultures originating from Chinese, Malay, Indian, Eurasian and Arab ethnicities. The Orchard Road district, which is dominated by multi-storey shopping centres and hotels, is the centre of tourism in Singapore. Other popular tourist attractions include the Singapore Zoo and its Night Safari along with the tourist island of Sentosa.

Plate 2.4.9.1: Singapore city skyline

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[3] Source: World Tourism Organisation

Tourism Products

The key tourism products promoted by country are:

- Leisure – The country has developed infrastructural faciltites of global standards and offers a multitude of leisure options. The major leisure options being promoted are Shopping and Food. Singapore has developed specialized promotional campaigns which focus on the country being the food capital of Asia.
- Art and Culture
- MICE – One of the key tourism products of the country is MICE tourism.

Promotional Modes

The promotional campaign of Singapore projects the image of the country as a unique destination in South East Asia..The country has adopted a variety of innovative promotional modes such as organizing events especially for its target customers such as Shopping Festivals and celebrity promotion where clebrities promote the country (e.g. Krissh moive promoted Singapore) It has developed specialized campaigns for its different target markets.

2.4.10.   Thailand

Thailand is located in south East Asia and is one the world's largest countries in sheer size. Tourism is one of the key drivers of economic growth for the country.

Tourism in Thailand
Industry Status

The tourism industry in Thailand is a very large sector of the economy. The country contributes around 0.6% to the global tourism market and the tourism indsutry contributes around 6.5% to the country's GDP. Thailand ranked number 18 in tourist arrivals worlwide in 2004, receiving around 11 million tourists.

Tourism Destinations/Resources

The country's mix of oriental culture and natural beauty is its prime attraction. The prime destinations in the country are:

- Bangkok - Bangkok was founded in 1782 by the first monarch of the present Chakri dynasty. It is now the country's spiritual, cultural, diplomatic, commercial and educational hub. For tourists, Bangkok has a feast of attractions to offer. The city is dotted with 400 Buddhist temples, palaces, classical dance extravaganzas, numerous shopping centers and traditional ways of life, especially along the canals and the Chao Phraya River winding through the city.

Plate 2.4.10.1: Bangkok Skyline

- Phukhet - Located approximately 862 kilometers south of Bangkok is Phuket, Thailand's largest island. Its natural resources- rocky peninsular, limestone cliffs, white powdery beaches, tranquil broad bays and tropical in-land forests contribute to making it the south East Asia's most visited and most popular island and province.

Plate 2.4.10.2 : Beaches of Phuket island

- Pattaya - Pattaya is nestled along a picturesque bay on the East Coast of the Gulf of Thailand, roughly 170 kilometers southeast of Bangkok and offers an exotic holiday beach vacation.

Tourism Products

The key tourism products promoted by country are:

- Culture – The unique cultural heritage of the country is its prime tourism product.
- Adventure – The country offers a multitude of adventure options for travelers and promotes adventure tourism as one of the key tourism products.
- Eco Tourism – The country is promoting its natural resources through eco-tourism.
- Medical tourism – The country is offering its state of the art medical facilties to the international travelers and medical tourism is one of the newly developed products of its tourism campaign.
- Leisure – The country offers a plethora of leisure options and it is one of the key tourism products being promoted by the country.

Promotional Modes

The promotional strategy of the country is based on the image of Thailand as an exotic destination having unique culture and abounding in natural beauty. The major promotional modes are campaigns in the electronic and print media. The country is also part of ASMECS which is a regional tourism cooperation agency between five countries - Cambodia, Laos, Myanmar, Thailand and Vietnam. As part of the promotional strategy to develop tourism in these five countries, ASMECS offers incentives to the travelers to visit all the five countries together as one destination.

Strong brand building is to be the primary strategy of the Tourism Authority of Thailand (TAT), as it seeks to achieve a target of 13.8 million in 2007. The new marketing slogan, Thailand Unforgettable, is a key component of the strategy, which will also include strong efforts to maintain the marketshare, boost tourism revenue earnings and enhance. Thailand's competitive edge. TAT has set its 2007 target at 15 million international visitors.

This year, TAT researched its competitive position and found that Thailand featured amongst the top 10 destinations in the holiday segments of beach holidays, family destinations, nightlife and conventions. Research by other publications like Lonely Planet, popular with the young people, show that Thailand is already the top-rated destination in terms of value and food. It has also been rated as having the "most exciting outdoor market."

Under the new Thailand Unforgettable slogan, the marketing activities will seek to accentuate Thailand's key strengths as a destination: sun, sand and sea; the modern and the traditional; and shopping, dining and golfing. Visitors should leave with memories of Thailand as a kingdom of unforgettable beauty, luxury, culture and adventure.

Five new tourism products and services have been identified to cater to the needs of specific market segments: Classic Destinations, Emerging Destinations, Sport Activities, Trendy Products and Special Product of the Year.

In each segment, the following have been identified in a way that allows the key product highlights to be matched with the destinations that best offer them:

Classic Destinations (Bangkok, Phuket, Pattaya, Samui and Chaing Mai); Emerging Destinations (Ko Chang, Ko Lanta); Sport Activities (Golfing, Driving and Yachting); Trendy Products (Boutique Hotel, Spa and Wellness, Medical Tourism); Special Product of the Year (The Royal Flora Ratchaphruck 2006 – the international horiticultural exposition to be held from November 1, 2006 – 31 January, 2007, in the northern city of Chaing Mai.

2.4.11.   United Arab Emirates

The United Arab Emirates (also the UAE or the Emirates) is a Middle Eastern country situated in the southeast of the Arabian Peninsula in Southwest Asia on the Persian Gulf, comprising seven emirates: Abu Dhabi, Ajmān, Dubai, Fujairah, Ras al-Khaimah, Sharjah, and Umm al-Quwain. Due to its oil resources, the country has achieved rapid economic growth and is one of the wealthiest countries in the middle east. It has developed world class infrastructural faciltites and its cities centers are of global trade and business.

Tourism in UAE
Industry status
The United Arab Emirates is one of the world's fastest growing tourist destinations, owing to the multitude of leisure options and infrastructural facilities. The country received 5.8 million tourists in 2004 and ranked 32 in worldwide tourism arrivals[4].

Tourism Destinations/Resources
The main attractions of the country are the cities especially Dubai, Abu Dhabi and Sharjah.

Plate 2.4.11.1: Burj-al-arab hotel, Dubai

Tourism Products
The key tourism products promoted by country are:

- Leisure – The prime tourism product of the country is Leisure. The country has developed a multitude of leisure options which would specifically interest the high end tourists.
- MICE – MICE tourism is one of the key products being promoted by UAE.
- Medical Tourism – The country has developed state of the art medical facilities and is promoting medical tourism in a major way.

=[4] Source: World Tourism Organization

Promotional Modes

The promotion strategy of UAE is based on projecting the country as the jewel of the Middle East. The country has utilized a multitude of communication modes (electronic and print) for tourism promotion. It has used the various communication media for its marketing campaigns. In addition it has developed a number of specialized events (such as Dubai Shopping Festival, Dubai Summer Surprises) for tourism promotion.

2.4.12.   **Mauritius**

Mauritius is an island nation in the southwest Indian Ocean and is one fo the most popular destinations for travelers.

Tourism In Mauritius

Industry status

Tourism is one of the major growth industries in Mauritius. In terms of foreign earnings, tourism is the third pillar of the Mauritian economy after sugar and textile industry.

Tourism Destinations/Resources

The natural beauty of the country especially its beaches and marine wealth is its main tourism resource. The popular destinations in the country are:

- Pereybère - The Pereybere public beach is popular because of its shopping facilities, restaurants and pubs.
- La Cuvette Beach
- Balaclava Ruins - They are ruins of a famous 17th century estate.
- Grand Bay Beach- Grand Bay was the first area of the island to fully experience the tourist boom; it is a shopping and leisure paradise.

Plate 2.4.12.1: Grand Bay Beach

- The Labourdonnais Orchards - The orchards are popular for hiking and trekking activities.
- Flacq Market - Flacq is one of the most important villages in Mauritius. This meeting point for inhabitants of the East boasts the country's largest open air market. The market attracts a large number of tourists.
- Ile aux Cerfs- Ile aux Cerfs is a paradise for water sports and has the most beautiful beach in Mauritius.
- Domaine du Chasseur - Domaine des Grand Bois has hunting grounds covering an area of 900 hectares. Stags, monkeys and boars live amidst the luxuriant vegetation of the hillside.
- Martello Towers – An important historic site visited by tourists.
- Chamarel – Famous for its natural beauty e specially its multicolored earth.

Plate 2.4.12.2: Chamarel

- Casela - Situated in the Rivière Noire district, the bird park stretches over 25 hectares and contains more than 140 bird species from all five continents. Other attractions include fish ponds, tigers, tortoises, monkeys, deer and orchids.
- Yemen Game Reserve
- L'Aventure du Sucre - an interactive and ultra modern exhibition situated at the heart of an ancient sugarmill
- Black River Gorges National Park - This national park of 6,574 hectares was created in 1994 for the protection of Mauritius' remaining native forests and is a popular tourist destination.

Plate 2.4.12.3: Black River Gorges National Park

Tourism Products

The key tourism products promoted by country are:

- Leisure – The prime tourism product of the country is Leisure. The country has developed a multitude of leisure options which would specifically interest the high end tourists.
- Adventure Tourism - One of the main attractions of the country are the various avenues of adventure activities it can provide to the tourists (especially water sports) and it is one of the products in its tourism strategy and campaign.
- Eco-Tourism – The country has developed certain destinations exclusively for eco-tourism and it is one of the the key products of its promotional strategy.
- Golf Tourism – The country promotes Golf Tourism as an exclusive product in its tourism campaigns.

Promotional Modes

The country's promotional strategy focusses on attracting the high end traveler. The marketing campaign promotes Mauritius as an exclusive destination " reserved only for a chosen few". The major promotional modes adopted are campaigns in the electronic and print media.

3.1   Overview

The tourism industry in India has shown healthy signs of growth in the recent years. In 2004, India ranked 47th in world tourist arrivals with around 3.46 million tourists visiting the country. Moreover, foreign exchange earnings from tourism have been increasing at a gradual rate. In 2005, the estimated foreign exchange earnings were to the tune of 5731 million dollars (US$), which is an increase of 20.2% from previous year. Also, one of the interesting features of foreign exchange earnings from tourism in 2005 has been the per tourist exchange earnings in India. It was observed that on an average, per tourist exchange earnings in India was about US$1462 against the estimated world average of US$ 844. The chart below depicts the difference in average foreign exchange earnings of selected countries and India in 2005

Figure 3.1: Estimated foreign exchange earnings per Countries vs. India (2005)
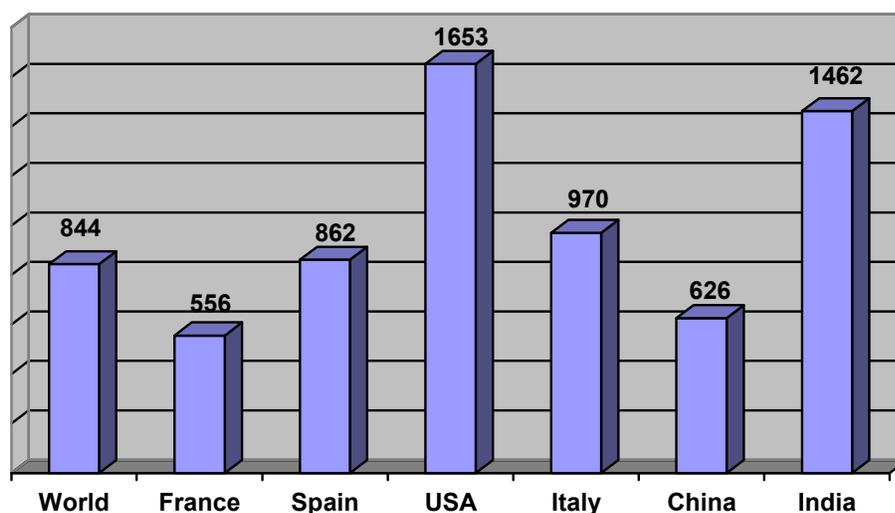
Source: World Tourism Organization

The majority of the countries have lower per tourist exchange earnings compared to India; only USA is having a higher per tourist earning. This shows India's potential to earn more per tourist. However, India still ranks below a lot of countries in tourism arrivals; the percentage share of worldwide tourist arrivals only amounting to 0.45% in 20045. The chapter attempts to evaluate the current status of tourism industry with respect to foreign tourist arrivals.

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[5] Source: World Tourism Organization

3.2.   India as a foreign tourist destination

India is becoming an attractive destination internationally. Due to the rapid economic growth and globalization, India is increasingly seen as an exotic destination offering a mix of culture, history and state of art amenities to the international traveler. However, the country attracts considerably lesser number of foreign tourists compared to a number of smaller South East Asian countries especially Malaysia, Thailand, Hong Kong and Singapore.

3.3.   Trends in foreign tourist arrivals

There has been steady increase in foreign tourist arrivals in the recent years. In 2004, India received around 3.46 million foreign tourists, which increased to 3.92 million in the year 2005. The following table gives foreign tourist arrivals for five years (2000 to 2005):

Table 3.1: Tourist arrival and Percentage Change

Year	Arrivals	
	Number	Percentage Change w.r.t pervious year
2000	2649378	6.7*
2001	2537282	-4.2
2002	2384364	-6.0
2003	2726214	14.3
2004	3457477	26.8
2005	3920000	13.2

Source: Bureau of Immigration

From the historical data it is evident that the maximum numbers of tourist arrivals have been in the year 2004. In the years 2001 and 2002, there was abrupt decline in tourist arrivals with negative annual growth registered for both the years. However, in 2003, the number of foreign tourist arrivals registered a phenomenal growth (14.3%) which continued in the subsequent year also. The trend has continued in the year 2005 as well.

The top ten countries which have been contributing to inbound tourism in the past few years are U.K., U.S.A., Canada, France, Sri Lanka, Germany, Japan, Malaysia, Australia and Italy. During 2004, all the ten tourist generating countries, registered positive growth. Maximum increase was registered in the case of Germany (51.8%) followed by Italy (39.8%). Also, Spain, which is among the top fifteen markets for India, registered a higher growth than Italy with around 40.4% increase in tourist arrivals in 2004. The chart below shows the country wise trends in tourist arrivals from the top ten countries for 5 years (2000 to 2004):

Figure 3.2: Tourist arrival in India and share of different countries

	2000	2001	2002	2003	2004	2005
U.K.	432644	405472	387846	430917	555907	647000
U.S.A.	348292	329147	348182	410803	526120	618000
Canada	84013	88600	93598	107671	135884	156000
France	100022	102434	78194	97654	131824	151000
Sri Lanka	129193	112813	108008	109098	128711	137000
Germany	83881	80011	64891	76868	116679	129000
Japan	98159	80634	59709	77996	96851	102000
Malaysia	60513	57869	63748	70750	84390	98000
Australia	53995	52691	50743	58730	81608	96000

Source: Ministry of Tourism, Government of India

The trends for the last five years indicate that U.K and U.S.A. .have been the major contributors in tourist arrivals surpassing rest of the countries. In the years 2001 and 2002, there seem to be a general decline in the tourist arrivals from all the ten countries, which also correlates to the decline in the total foreign tourist arrivals registered in these two years. However, in the corresponding years, tourist arrivals have shown a considerable increase with 2004 registering an annual growth of 26.8%. Region wise, the maximum numbers of tourists are from Western Europe followed by South Asia, North America, South East Asia, East Asia, West Asia, Africa, Australasia, Eastern Europe and Central and South America6.

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[6] Statement based on data published in "India Tourism Statistics Report", 2003 and 2004, Ministry of tourism, Government of India.

The seasonality in foreign tourist arrivals to the country shows a wide variation with majority of the tourists visiting the country during the month of December. The winter months of October to December is the preferred season of the foreign tourists for visiting India and least number of tourists visit in the summer months of April to June. The percentage share of tourists' arrival in the different seasons in 2004 is shown in the chart below:

Figure 3.3: Tourist arrival and their seasonality
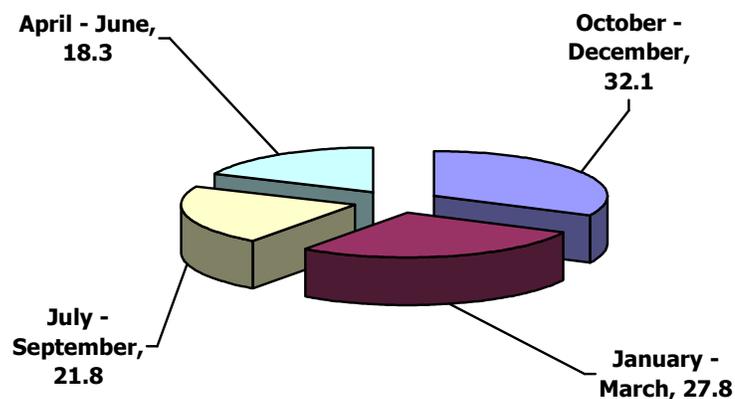
Contrary to the world travel trends (Refer Chapter 2 above), maximum tourist arrival takes place in India the during the October – December period compared to the July September period.

3.4.   Prime states and destinations visited

An international passenger survey was carried out in 2003[7] for in depth assessment of inbound tourism scenario in India. According to the survey, the top 10 destinations preferred by foreign tourists in India are:

1.   Delhi
2.   Mumbai
3.   Chennai
4.   Kolkata
5.   Bangalore
6.   Mysore
7.   Agra
8.   Hyderabad
9.   Khajuraho
10.   Gaya

Some of the preferred destinations especially the metropolitan cities such as Delhi, Mumbai, Chennai, Kolkata and Bangalore are also the preferred entry points of foreign tourists into India. The states

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[7] International Passenger Survey 2003 by Ministry of Tourism, Government of India

which are preferred by the tourists are the ones in which the popular destinations are located, as such majority of the tourists are interested more in the destinations. According to a survey conducted in 2001, the top 10 states which accounted for more than 90% of foreign tourist arrivals are:

Table 3.2: Top 10 States: Foreign Tourist Arrivals (2001)

State	Foreign Tourist Arrival (% of total)
Maharashtra	16.80
Delhi	15.30
Uttar Pradesh	14.70
Tamil Nadu	14.30
Rajasthan	11.20
West Bengal	5.20
Goa	4.80
Kerala	3.90
Karnataka	2.60
Himachal Pradesh	2.50
Total	**91.30**

Source: Ministry of Tourism. Government of India

Among the top 10 states, Maharashtra accounted for maximum share of foreign tourist arrivals followed by Delhi. The two most preferred destinations (i.e. Mumbai and Delhi) by foreign tourists are located in these two states which may account for such a huge volume of tourist arrivals.

The most important parameter for India will be the role of the travel agent and the tour operator. Earlier the neighbourhood travel agent was a friend, philosopher and guide of the customer. The successful travel agent/tour operator had to be an expert in geography and also well-traveled and knowledgeable about different destinations and different countries. Today he may not have traveled at all but he should know "How to surf the Net and find out where, what information is available". In future the tour operator and travel agents will not be just a service provider but also information provider.

Foreign tourists do take longer time to decide India as the destination for their holidays but once such decision is finalized in favour of India; they spend longer time & spend more. With every thing on offer from heritage to wellness, mountains to beaches, apparently a mere 3.9 million foreign tourists coming to India looks very disappointing. But the satisfaction part is that the average stay of a tourist in India is about 29 days and is compared to world average, it is very high. There are some inherent problems and these are well0 known but till date nothing concrete could be achieved in solving these issues. These are mainly related to obtain visas for India from Indian Embassies in Europe, USA, China, Middle East airport facilities, acute shortage of hotel rooms etc. and to speak in one sentence – lack of infrastructural facilities. Also due to limited budget for global campaigns, the targeted campaigns in international markets through prints electronic media do not provide the right results. With commonwealth games in 2010, World Cup in 2010, Asian Championship in 2011 the build up for India looks very convincing but all things must be put at proper place. It must develop networking with all major airlines, start media blitz, train manpower, select cadre of tourism professional for PR and promotional activities specially with all those International airlines who are operating to India. Appoint & select brand ambassadors who can create right impact in the selected markets. India should learn from Australia and Germany – who had successfully converted the major sports events that is to say Olympic in Sydney/ Common Wealth Games in Melbourne and World Cup Soccer in Germany (concluded recently;) into great tourism events.

Thailand is becoming a year-round destination with the low-season period now confined only to April to June. Although Bangkok and major tourism destinations remain popular among international visitors, tourism income is also growing in some of the new destinations.
Markets like China, Japan, Korea, Taiwan and Hong Kong are all growing again, mainly due to good economic conditions and more public holidays, leading to more travel to shot-haul destinations.

Asia continues to command the biggest market share with 58.11% of total arrivals in the first quarter of 2006, followed by Europe (23.33%). The top ten generators of arrivals are Malaysia, Japan, Korean, Singapore, China, UK, America, Hong Kong, Germany and Australia.
Increasing vigilance, strengthening of the safety measures at airports, rail way stations and other public places and installing confidence among international and domestic tourists will help campaigns like Incredible India bring the desired results. "After the recent terrorist attacks in Mumbai and Srinagar there has been a drop of 10-20% in the inflow of foreign tourist arrivals.

The travel and tourism sector was not doing much to boost luxury travel. "There are a large number of opportunities in the segment, but are our tourism offices abroad geared to handle that level of tourist?" The task at hand is enormous, and all the stakeholders need to put their heads together to boost tourism. While it cannot be denied that world-class cities need world-class airports, India will take a while to attain hub-status. However, there had been a lot of movement in the aviation sector, both on the airside as well as on the ground, air travellers would witness the changes once the first phase of the modernizations of Delhi and Mumbai airports is completed by 2009-10. Despite the growth and the optimistic outlook, the next two / three years, would be crucial for the aviation industry.

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Chapter Four

Tourism products, Policy and Promotion issues – An Evaluation

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4.1   Overview

In order to assess the existing scenario of tourism industry in the country and identify the major drawbacks to its growth, an evaluation of the tourism products, government policies and promotional strategies has been undertaken in this section.

4.2   Tourism products

The National Tourism Policy has identified certain tourism products which have the potential to attract foreign tourists. The products identified are:

- Heritage Tourism
- Wildlife Tourism
- Eco-Tourism
- Medical Tourism
- Adventure Tourism
- Rural Tourism
- MICE Tourism
- Buddhist Circuit
- Golf Tourism
- Shopping and Fashion
- Cuisines

The main theme behind each tourism product, important locations/centers pertaining to the product and the country's stronghold in each product have been detailed below. Each of the product has been discussed in detail below.

Product	The Theme	Important locations/ centres	India's stronghold
Heritage Tourism	Heritage tourism is a combination of emerging trends in tourism as a whole, and the ever growing sophistication of cultural heritage conservation activities, particularly for the major monuments and historic cities.	➢ Agra Fort ➢ Ajanta Caves ➢ Buddhist Monuments at Sanchi ➢ Champaner-Pavagadh Archaeological Park ➢ Chhatrapati Shivaji Terminus ➢ Churches and Convents of Goa ➢ Elephanta Caves ➢ Ellora Caves ➢ Fatehpur Sikri ➢ Great Living Chola Temples ➢ Group of Monuments at Hampi ➢ Group of Monuments at Mahabalipuram ➢ Group of Monuments at Pattadakal ➢ Humayun's Tomb, Delhi ➢ Khajuraho Group of Monuments ➢ Mahabodhi Temple Complex at Bodh Gaya ➢ Mountain Railways of India ➢ Qutb Minar and its Monuments, Delhi ➢ Rock Shelters of Bhimbetka ➢ Sun Temple, Konârak ➢ Taj Mahal	✓ India's history and virile culture laid out over ages ✓ Wide array of locations of interest, a considerable no. of them listed in the world heritage location ✓ As far as no. of Heritage sites are concerned, India ranks 7th in the world after Italy, France, China, Germany, France and UK.

Leading Destinations around the World and no. of heritage sites	
Italy – 41	Germany – 32
Spain – 39	France – 30
China – 33	UK – 27

Product	The Theme	Important locations/ centres	India's stronghold
Wildlife Tourism	A real treat for people who love the flora and fauna. This pertains to travel to the different serene locations in order to enjoy the wilderness of nature, animals in their natural settings.	➢ Corbett National Park ➢ Kanha National Park ➢ Bandhavgarh National Park ➢ Ranthambore ➢ Madhumalai ➢ Nagarhole ➢ Kaziranga ➢ Periyar ➢ Bharatpur ➢ Little Rann of Kutch ➢ Chilika ➢ Sunderbans	✓ Home to some rare species in the biogeographical realm. E.g. Sunderbans – Royal Bengal Tiger, Bhitarkanika – Olive Ridley Turtle, Gir – Asiatic Lions, Kaziranga - One Horned Rhino ✓ 70 National Parks and 400 wildlife sanctuaries ✓ Some of them Ramsar and World heritage wildlife sites ✓ 183 of the above inventory has been listed in the website of ministry of tourism as prime ones, the break up is as follows:- North – 43, East – 28, West – 45., South – 58, Central – 9

Leading Destinations around the World	
Southern America – Brazil, Peru, Galapagos, Mexico, Panama, Costa Rica, Belize, Chile	Africa – South Africa, Zambia, Namibia, Tanzania, Kenya
North America – Alaska, Canada,	South Pacific - - Papua New Guinea, Bali, New Zealand
South East Asia – China, Tibet, Mongolia, Borneo, Vietnam	

Product	The Theme	Important locations/ centres	India's stronghold
Eco-Tourism	Travel to relatively undisturbed or uncontaminated natural areas with the specific objective of studying, admiring and enjoying the scenery of its wild plants and animals, as well as any existing cultural aspects found in these areas.	➢ Backwaters, Spice Farms of Kerala ➢ Rishikesh, Uttaranchal ➢ Rajgarh & Tirthan of Himachal Pradesh ➢ SaatTal, Mukteshwar, Nainital and Mori of Uttaranchal ➢ Western Ghats and Rainforest of Karnataka	✓ Exquisite bouquet of natural destinations ✓ Large no. of destinations in the different states can also be promoted involving the nature, tourists, communities, agencies involved

Leading Destinations around the World	
Southern America – Brazil, Peru, Galapagos, Mexico, Panama, Costa Rica, Belize, Chile	Africa – South Africa, Zambia, Namibia, Tanzania, Kenya
Asia – China, Nepal, Sri Lanka	Europe – Switzerland, France

Product	The Theme	Identified Important locations/ centres	India's stronghold
Medical Tourism	Medical Tourism is a concept where a patient travels to another country for medical treatment/ relaxation needs in order to save costs, or get treatment faster or even to avail of better medical facilities.	➢ Ayurveda - Kerala ➢ Hi Tech Healing – Bangalore, Chennai, Hyderabad, Delhi ➢ SPA – Kerala, UP (Agra), UT (Mussourie), Tamil Nadu (Conoor), Karnata (Mysore), Rajasthan (Neemrana), Rishikesh (Ananda), Haryana (Nolta) ➢ Yoga – Haridwar, Bangalore, Rishikesh	✓ India has a reasonably strong portfolio of Ayurveda and Yoga, which is believed to have originated from here. ✓ High level expertise in heart surgery, knee replacement, other orthopaedic treatments, cosmetic surgery, eye care, dental treatment ✓ Cheapest pricing options amongst South East Asia nations ✓ Language advantage – Indians are eloquent speakers in English compared to other South East Asian countries, which are direct competitors in this category
Leading Destinations around the World			
Americas – Brazil,, Cuba, Costa Rica		Europe – Hungary, Belgium, Poland	
Asia – Israel, Jordan, Lithuania, Malaysia, Singapore		Africa – South Africa	

"Medical Tourism – A new area of growth", highlighted the fact that yoga, meditation, Ayurveda, allopathy and other systems of medicines were already the country's forte. India has on offer an inviting basket of medical services and it has resulted in the country emerging as a healthcare hub for overseas patients from countries such as USA, UK, New Zealand and Australia among others. During 2005, about 1,50,000 foreigners landed in India to take advantage of the comparatively low-priced and efficient medical services available in the country.

Product	The Theme	Identified Important locations/ centres	India's stronghold
Adventure Tourism	A type of niche tourism involving exploration or travel to remote areas, wherein the traveller should expect the unexpected	➢ Water Sports • White water rafting & kayaking – Goa, Karnataka, Kerala • Diving – Lakshwadeep, Andaman& Nicobar • Water Skiing – Diu, Colva, Covelong ➢ Trekking – Kashmir, Uttaranchal, Himachal Pradesh, Leh &Ladakh, Sikkim, Karnataka, Maharashtra, Orissa, Kerala. ➢ Rock Climbing – Bangalore, Badami, Kambakkam (Chennai), Hampi (Karnataka), Pavagarh (Gujarat), Dhauj (Haryana), Delhi, Mukteshwar (Uttaranchal), Gangotri (Uttaranchal) ➢ Mountaineering – Entire Kumaon and Gharwal range ➢ Aero sports • Paragliding – Himachal, Uttaranchal, Rajasthan, Maharashtra, Delhi • Parasailing – Goa, Thiruvananthapuram, Chennai and certain parts of Orissa, Manipur, North Guwahati in Assam and Delhi • Hang Gliding – Pune, Delhi, Chandigarh, Shimla, Mumbai, Bangalore • Ballooning – Guwahati, Dehradun, Bangalore, Delhi and Jaipur ➢ Skiing – Manali, Kufri, Narkanda, Shoja, Triund (HP), Auli, Dyara Bugiyal, Mundali, Munsiyari (Uttaranchal), Gulmarg (J&K)	✓ India has the potential for all major adventure sports enlisted. ✓ The lofty peaks, fast flowing rivers and huge coastline provide immense opportunity for developing tourism of this kind
Leading Destinations around the World			
All major tourist destinations across the world has started promoting itself adding an element of adventure into it.			

Product	The Theme	Identified Important locations/ centres	India's stronghold
Rural Tourism	Any form of tourism that showcases the rural life, art, culture and heritage at rural location, thereby benefiting the local community economically and socially as well as enabling interaction between the tourists and the locals for a more enriching tourism experience can be termed as rural tourism. In simpler words, the concept revolves round visiting village settings to experience and live a relaxed and healthy lifestyle	➢ Pochampalli & Srikalahasti - Andhra Pradesh ➢ Sualkuchi & Durgapur – Assam ➢ Nepura – Bihar ➢ Chitrakote & Nagamar – Chatisgarh ➢ Hodka – Gujarat ➢ Jyotisar – Haryana ➢ Naggar – Himachal Pradesh ➢ Banavasi – Karnataka ➢ Aranmula & Kumbhalanghi – Kerala ➢ Chaughan & Pranpur – Madhya Pradesh ➢ Suibajran – Khullabad – Maharashtra ➢ Pipili & Raghurajpur – Orissa ➢ Rajasansi – Punjab ➢ Neemrana, Samode, Haldighati – Rajasthan ➢ Laachen – Sikkim ➢ Karaikudi & Kazhughumelal – Tamilnadu ➢ Kamlasagar – Tripura ➢ Bhaguwala – Uttar Pradesh ➢ Jageshwar & Mana – Uttaranchal ➢ Balabhpur Danga & Mukutmanipur – West Bengal	✓ Rural India the backbone of Indian society and economy ✓ India has nearly 7 million villages ✓ Each village has distinctive culture and craft, which is different from that of the neighbouring village or village in neighbouring state
Leading Destinations around the World			
This is an unique product for India. No major competitor exists in the world in relation to this product.			

Product	The Theme	Identified Important locations/ centers	India's stronghold
MICE Tourism	Meetings, Incentives, Conferences and Exhibitions, are now a major mode to attract the overseas tourists. India already has an exciting inventory of locations to cater the visiting business delegates	➢ New Delhi ➢ Mumbai ➢ Agra ➢ Bangalore ➢ Chennai ➢ Cochin ➢ Goa, ➢ Hyderabad ➢ Jaipur ➢ Kolkata.	✓ Foreign investment spurred by globalisation, more and more foreigners choosing India for their Seminars and conferences ✓ The MICE segment is growing in India at 15% - 20% annually ✓ Excellent infrastructural amenities for business delegates ✓ International and Domestic Air network reach out to the different important centres ✓ Railway network most intricate in the world ✓ Excellent network of roads
Leading Destinations around the World			
America – Major cities in United States, Canada, Cuba, Brazil		Europe – Major Cities in Western European nations	
Asia – China, Thailand, Malaysia, Singapore		Africa – Egypt, South Africa, Kenya	

MICE is an important component already in the not-so-peak seasons. The state of Kerala is bullish about the growing popularity of MICE travel and its focused implementation is beginning to produce results. During the last couple of years, 15-20 per cent of total visitors to the state were MICE travelers and the numbers are gradually on the rise. Now they are to weave the same magic during the monsoon.

"The state has some unique advantages like three international airports within 600 kilometers, good connectivity to the Middle East and the Far East, High telecom density, a large English-speaking population and the lure of visiting God's Own Country." Apart from this efforts are also being made to push forward major infrastructural projects like the Trivandrum International Convention Center, the Kannur Airport and the Cochin Marina to give an impetus to tourism.

Despite being at a distance of only 15 km from the state capital Trivandrum, the beach destination of Kovalam has not been able to use its USP of beach as a draw and lags behind the other destinations – Kumarakom (Backwaters), Munnar (Hill), Thekkady (Wildlife) and Kochi (the commercial hub) in Kerala. A sea not co0nducive to water sports, a beach lined with black silt, inadequate water supply, and bad roads, among other things, are pulling numbers away from Kovalam.

A project worth Rs 35 crore which entails construction of a 800m-long artificial reef, one kilometer from the coast has been submitted to the government. The sand bar thus created will curtail the rough sea and also create a curling effect, which will be ideal for surfing. Besides enabling water sports, the reef will also stop the black silt, which makes the beaches black from gathering on the beaches leaving them golden and clear.

MICE business for Kovalam which primarily receives leisure travelers – foreigners coming in for ayurvedic treatments and domestic travelers for weekends. However, sensing the potential of MICE, KTDC is planning to develop a state-of-the-art convention facility at Akulam, 14 km from Kovalam, at a cost of Rs 140 crore over the next three years. At the moment, in Kovalam, The Leela Kempinski is the only property with a convention center having a seating capacity of 1,000.

Product	The Theme	Important locations/ centers		India's stronghold
Buddhist Circuit	A pilgrimage tour that is gaining considerable popularity in recent times is that of Buddhism. This is a product branded exclusively for the buddhist sect. Each location has a significant role in the life of the Lord or were instrumental in propagating budhdhism in India.	➢ Areraj ➢ Aurangabad ➢ Bodhgaya ➢ Guneri ➢ Kesaria ➢ Lauria ➢ Nalanda ➢ Rajgir ➢ Vaishali ➢ Vikramshila ➢ Ajanta & Ellora ➢ Kalgaon ➢ Khandiri ➢ Kaushambhi ➢ Kushinagar ➢ Nagarjunakonda	➢ Sanchi ➢ Sravasti ➢ Sarnath ➢ Vidisha ➢ Tawang ➢ Rumtek ➢ Pemagyantse ➢ Dharmashala ➢ Tabo ➢ Leh ➢ Dhauli ➢ Ratnagiri ➢ Udaygiri ➢ Lalitgiri ➢ Khandagiri	✓ A strong bouquet of Buddhist spots/ locations ✓ A wide array of archaeological spots, religious locations, architectural marvels – all of them together in a single country
Leading Destinations around the World				
Nepal, Sri Lanka, China				

A former colonial retreat, McLedodganj in the Kangra valley, is another important Buddhist center and a charming Tibetan settlement. Often called the 'little Ihasa' this town is the resdence of His Holiness the Dalai Lama. A giant prayer wheel adorns the main street of McLeodganj and the striking monastery houses grand images of the Buddha and Padmasambhava. There are thirty- three Buddhist monasteried and temples in Kinnaur. Ornamented with murals and stuccoes, the temples here enshrine the legendary footprints of Padmasambhava. Another very sacred site of Buddhism in Himachal Pradesh is Rewalsar

Golf Tourism

Golfing in India is gaining a lot of popularity in the global golfing community. Golf Tourism is one of the innovative products which have been envisaged to attract the high end tourists to India.

India's Stronghold in Golf Tourism
- *Indian Weather - The perfect outdoor temperatures starting late October till the first half of December and from February till late March.*
- *World Class Golf Courses – The country has world class golf courses which include golf courses designed by internationally renowned designers and historically important golf courses.*
- *Choice of Locations – The country offers choice of different locations which have distinct landscape and weather offering immense variety to the golfers.*

India offers some of the greatest golfing challenges including world class designer golf courses and other golf courses with historical importance. Some of the major golf courses/clubs in the country are:

Table 4.1: Golf Courses and their locations

Name Golf Club/Course	Location
Air Force Golf Club	New Delhi
Delhi Golf Club	New Delhi
Army Golf Course	New Delhi
Qutub Golf Course	New Delhi
Jaypee Greens Golf Club	Greater Noida, U.P.
Noida Golf Course	Noida Distt,Uttar Pradesh.
Golden Greens Golf & Resorts	Gurgaon, Haryana
DLF Golf & Country Club	Gurgaon, Haryana
Classic Golf Resort	Gurgaon, Haryana
Aravalli Golf Club	Faridabad, Haryana
Bombay Presidency Golf Club	Mumbai, Maharashtra
Amby Valley Golf Course	Pune, Maharashtra
Poona Club Golf Course	Pune, Maharashtra
Karnataka Golf Association	Bangalore, Karnataka
Kodaikanal Golf Club	Kodaikanal, Tamil Nadu
Taj Exotica Banaulim Salset Goa:	Calwado, Banaulim, Goa
Bhuvaneshwar Golf Club:	Bhuvaneshwar, Orissa
Lucknow Golf Club:	Lucknow, U.P.
The Grand Greens, Goa:	Raj Baga, Cancona, Goa
Kashmir Golf Club:	Srinagar, Kashmir
The Leela, Goa:	Salcette, Goa
Kolar Gold Fields Gymkhana Club:	Kolar Gold Fields, Karnataka
Ramada Caravela Golf Beach Resort Goa:	Varca Golf Village, Goa
Royal Calcutta Golf Club	Kolkata, West Bengal
Wellington Gymkhana Club:	Nilgiris, Tamil Nadu

There are a number of amateur and professional golf championships held in the country all throughout the year The Indian Golf Union (IGU) is the controlling body for golf as a sport in India and organizes a number of amateur events for promotion of the sport. The Professional Golfers Association of India (PGAI) is responsible for organizing the professional golfing events in the country.

Promotional Strategy and Campaign - The Ministry of Tourism has incorporated marketing of golf in its promotional campaigns. It is one of the key themes of its marketing and promotional campaign. Some of the key activities by the department towards promoting Golf Tourism are:

- Incredible India Theme Brochures – The department has come out special theme brochures to highlight golfing in India.

- Organizing Golf Championships - To project India as an ideal Golf destination the Department of Tourism organized Golf Championship "Indian Interline Golf Championship " for senior executives of International Airlines and major tour operators around the world in 2002.

One of the key proponents of Golf Tourism in the country has been the tour operators and the hotel & hospitality industry. There are a number of tour operators in the country who have developed golf tour packages in association with the hotel industry and are offering extensive tour packages for golf enthusiasts. Some of the tour operators have also incorporated other leisure and sports activities (such as yoga, shopping, etc.) with the golf tour packages so as to make them more attractive for the clients. The hospitality industry in the country has developed golf infrastructure of international standards and offer golf as part of the leisure activities.

Bottlenecks – Lack of comprehensive efforts on part of the various key players (such as the Ministry of Tourism, Indian Golf Union, Tour Operators and Hospitality Industry). There is no mention of Golf as a product on the Ministry of Tourism's flagship website "www.incredibleindia.org"

Shopping and Fashion

As part of Ministry of Tourism's efforts to evolve innovative themes for attracting different categories of travelers in the key source markets, "Shopping and Fashion" is one of the key themes being promoted in the Incredible India campaign.

Promotion Highlights - The campaign highlights the rich ethnic textile and handicrafts heritage of the country. Further, the campaign also focuses on the contemporary fashion industry in India.

Communication modes Adopted – The main communication mode adopted are features in Ministry of Tourism's publication "Incredible India".

Bottlenecks – The campaign does not focus on the shopping destinations in the country. There is no mention of Shopping and Fashion in the Ministry of Tourism's flagship website "www.incredibleindia.org"

Cuisines

The underlying idea of the Incredible India campaign is to project the cultural diversity of the country to the foreign tourist. One of the themes utilized in the campaign to promote the image of the country as a culturally rich and diverse destination has been the "Cuisines".

Promotion Highlights - The campaign introduces the traveler to the rich and varied cuisine that the country has to offer. The campaign further elaborates on the different types of cuisines and tastes the traveler can experience in different states of India.

Communication modes Adopted - The main communication mode adopted are features in Ministry of Tourism's flagship website "www.incredibleindia.org" and publications of "Incredible India". The different states tourism websites also have features on their distinct cuisines

Bottlenecks – The campaign only provides an overview of Indian cuisines to the tourists.

4.3   Strategies adopted to promote specific tourism products

Heritage Tourism:-

  i.   Upkeep/ Maintenance – The Archeological Survey of India is involved in the maintenance and conservation of approx. 3650 no of monuments of different categories belonging to different era.

  ii. Promotion – World heritage sites are being promoted by the Ministry of Tourism. The State Government on their own also promote the same.

  iii. Government Departments involved – Ministry of Tourism and Culture, State Department of Tourism, State Department of Culture (in certain states)

  iv. Other important agencies/ influencers – UNESCO, Travel Agents, Accommodation Units.

Wildlife Tourism

  i.   Upkeep/ Maintenance – Environment and Wildlife Department of respective State Governments.

  ii. Promotion – Major spots of this product category is being promoted by the Ministry of Tourism, especially the ones in which endangered, exquisite species are being found. The state governments on their part also promote the locations. Additionally, they also try and promote certain national parks/ sanctuaries of importance.

  iii. Government Departments involved – Ministry of Tourism, Ministry of Environment, State Department of Tourism, State Department of Wildlife (in certain states)

  iv. Other important agencies/ influencers – Television shows in Animal Planet, Discovery Channel and National Geographic Channel, Travel Agents, Accommodation Units.

Eco-Tourism

  i.   Promotion – There is an overlap between Eco- tourism and wildlife tourism. Hence, Eco-tourism, in it's true sense is yet to make it's mark in India, though it has immense potential to develop it as the "eco – tourism" hub.

  ii. Government Departments involved – Ministry of Tourism, Ministry of Environment, State Department of Tourism, State Department of Environment

  iii. Other important agencies/ influencers –Travel Agents, Accommodation Units.

Medical Tourism

  i.   Promotion – The Central as well as the State Government plays a very vital role in the promotion of medical tourism in the country to the foreign tourists. Additionally, the institutes (Hi-Tech, Spa, Ayurveda) on their own promote the strengths of their services offered.

  ii. Government Departments involved – Ministry of Tourism, State Department of Tourism.

  iii. Other important agencies/ influencers – Travel Agents, Accommodation Units (For SPA and Ayurveda).

The new areas of growth that could be targeted are American citizens not covered by insurances or even those in countries such as the United Kingdom where there were long waiting lists for many national health services. These patients preferred to receive treatment in a country like India where top-tier institutions could provide high-quality healthcare at a fraction of the cost.

"While a heart surgery costs $7,500 in India the trend that began as a trickle has grown exponentially in the last two years. Indian hospitals with specialist doctors have done exceedingly well. Medcity project in Gurgaon, where a 1,500-bed healthcare center of international standards with 20 super speciallities is being developed, it would incorporate traditional medicine too and have such facilities as hotels, service apartments, clinical and biotechnology laboratories.

Facilities that private hospitals provide to medical tourists:

- Airport transfer in car/ambulance
- Interpreters
- Travel arrangements (local sightseeing, shopping and prayer)
- Locker facility
- Co-ordinating appointments as well as arranging them on priority.
- Visa and foreign exchange assistance
- Cuisine to suit their palate
- Arranging accommodation (hotels for attendants)
- City map/guide
- Pre-paid phone cards

More service apartments and better infrastructure at airports are also needed to attract health tourists. The hospitals are marketing themselves on the net. Patients interact directly with them. Also, the government has been holding an annual medical expo in London. Medical tourism is being advertised in the Incredible India road shows as well.

Adventure Tourism

i.   Promotion – The Central as well as the State Government plays a very vital role in the promotion of adventure tourism in the country to the foreign tourists.

ii. Government Departments involved – Ministry of Tourism, State Department of Tourism.

iii. Other important agencies/ influencers – Travel Agents, Adventure Tour Operators, Accommodation Units

It is necessary to remove the impression of the people abroad who associate the Himalayas with Nepal – The Ministry should communicate to the world that two-thirds of the Himalayas are in India. Once the travel restrictions that are currently in place in areas in North East were removed adventure tourism shall take a substantial jump.

Rural Tourism

i.   Promotion – Undertaken by the Ministry of Tourism and State Department of Tourism with equal emphasis.

ii. Funding - Ministry of Tourism in partnership with UNDP has identified 31 villages across India for promotion of tourism of this kind. UNDP has committed approx. $2.5Mn for the project. Ministry of Tourism funds the same under its Rural Tourism project.

iii. Departments involved – State Government in association with implementing agency / NGO.

Some 36 villages have been identified in 20 states across India where visitors can enjoy life's simple pleasure in rural setting. These have been identified under the Endogenous Tourism Project Scheme. The basic objective is to facilitate capacity building, thereby enabling low-income village communities

to create and use their skills from within. A maximum amount of Rs. 50 lakhs would be sanctioned for each project by the Ministry to develop infrastructure like water facilities, sewerage, tourist reception centers and sanitation.

MICE Tourism

India is emerging as a top knowledge-based economy in the world, far ahead of China which is billed as the second largest global economy. Human resource is India's greatest asset and ahead of many countries because of its sheer amount of resources at its disposal. This inherent strength is driving Indian companies in making potential inroads into the global league. Be it biotech, IT & ITES, textile, automobiles, upscale FMCG, or for that matter tourism and travel; there is a widespread recognition of a remarkable resurgence at work. Last year when Prime Minister Manmohan Singh was in New York, he expressed the hope that India would be attracting $150 billion investment. This certainly promises a great opportunity. There are other national tourism boards going hammer and tongs to cash in on the opportunities offered by the ever-expanding multi national companies in India, including the Indian corporates.

MICE is a one billion dollar industry worldwide.

India Convention Promotion Bureau (ICPB) was established in 1988 by the Ministry of Tourism and Culture to tap the business involved in convention and conference.

- To undertake research for development for India's MICE industry and disseminate that information
- To undertake a continuing programme of advertising and other publicity, through media, for motivating national associations to bid for conventions, etc
- To encourage growth of professionalism in the MICE segments and evolve an industry code of ethics
- To provide necessary guidance and feedback to the central government and advise state governments in the development of infrastructure and facilities for MICE segments
- To conduct seminars, group discussions, courses of study and organize exchange of visits between Indian organizations and relevant world associations/ organizations.

According to International Congress and Convention Association (ICCA) that tracks events with a minimum 50 delegates, 63 per cent ot meetings worldwide have between 50 to 550 delegates. So, interestingly, mega events are in minority. "That is something we in India need to recognize our skill of handling smaller meetings."

Roughly 80 per cent of meetings worldwide are for 500 people or less. India is an ideal destination to target this market.

There are some specific guidelines laid down by the ministry of home affairs, government of India for obtaining permission to organize international conferences/ seminars/ workshops, etc in India. This permission facilitates the delegates in obtaining "Conference visa" from the Indian Embassies/ Missions in the countries from where they are coming.

International conferences / seminars / workshops (herein after referred to as events) are those events where substantive discussions / deliberations / interaction and exchange of thoughts and ideas take place on a specific subject matter with participants from foreign countries.

- Meetings organized by any business institution having foreign participants from its sister concern abroad
- Sports meets and sports events where foreign countries will take part
- Events of performing arts such as drama and festivals, in which groups from foreign countries will take part
- Meet of businessmen/industrialists from India and abroad organized by Indian chambers of Commerce where trade and business issues are discussed.

The organizers conceiving an idea of holding an event in India are required to submit a detailed proposal for obtaining permission to the nodal/administrative ministry, government of India at least eight weeks before the commencement of the event with the following documents/information: -

- Name of the organizer with complete mailing address
- Name of the contact person with complete address, telephone number, fax number, etc.
- Topic/topics to be covered in the event.
- Venue of the event (with complete address)
- Date of the event

The associations are required to provide tentative lists of the participating countries and participants giving the nationality, brief background suiting, participation in the event, address, personal and passport details. It maybe noted that the nodal/administrative ministry means, the ministry of government of India which is dealing/regulating the framing of rules etc. in respect of subject matter chosen for the event.

Once an event is cleared by the nodal ministry, organizers are required to send invitation to foreigners who wish to participate in the event. Foreigners should invariably be advised to opt for "conference visa" only (in the invitation letter, the organizers should mention the details of clearance accorded by the nodal ministry for conducting the event).

Today the need for conference signage is as strong as for branding a product and creating a corporate identity for the same which starts from the basic visiting card of the sales guy to the packaging of the product. Need of the hour is to work on the identity of a conference/exhibition/event which starts with:
• Name of the Congress • Logo design • Focus of theme • Duration of the event

AVERAGE SPENDINGS IN A TYPICAL MID-SIZE CONVENTION IS:

- Accommodation : 25%
- Travel : 10%
- Food : 25%
- Spouse programs : 5%
- Audio Visuals : 19.5%
- Gifts : 5%
- Documentation : 10%

With Basics being: • Visiting card • Letter head • Mailers • Envelopes • Courier bags • Baggage tags (for easier identification on airports)
Integrated communicating methods also need serious attention. These are: • First announcements right from the Arrival Airport • Transport shuttles • Facilitation counters at hotels • Earmarking rooms for delegates • Welcome kits in rooms • Breakfast setups

Display signs at the venue which include entrances, en-route to the conference hails information/registration areas, information signs like directory boards, program boards, backdrops for sessions and theme boards, Branding is required in each and every location where the eye moves to document the conference. Post Conference works: Must dos • Synopsis of session proceedings • Thank you letters after the show.

Buddhist Circuit
i. Promotion – Proactive campaign is being carried out by the Ministry of Tourism in association with respective State governments
ii. Government Departments involved – Ministry of Tourism, State Department of Tourism.
iii. Other important agencies/ influencers – Travel Agents, Accommodation Units.

The tourism ministry is focusing on enhancing the capacity of Gaya as a Buddhist destination for South-Asian tourists. As a follow up to last years "Walk with Buddha" campaign the focus this year is on the 2550th anniversary celebration of Buddha's parinirvana. As a result of this direct flights are scheduled to operate between Bangkok to Gaya as well as there shall be domestic connection between Delhi –Gaya & Varanasi – Gaya

4.4   Communication mode adopted

Heritage Tourism - The following modes of communication have been adopted for effective communication of cultural tourism to the foreigners:-

- ❖ *Features in Ministry of Tourism's publication "Incredible India"*
- ❖ *Features in Ministry of Tourism's flagship website www.incredibleindia.org*
- ❖ *State Tourism offices*
- ❖ *Websites hosted by the Individual States for promoting their states*
- ❖ *Websites of Travel Agents / Tour Operators*
- ❖ *Mention on the "Lonely Planet handbook for India", a must carry for the foreigners on their trip to India*

Wildlife Tourism - The following modes of communication have been adopted for effective communication of wildlife tourism to the foreigners:-

- ❖ *List of locations in Ministry of Tourism's flagship website www.incredibleindia.org*
- ❖ *State Tourism offices*
- ❖ *Websites hoisted by the Individual States for promoting their states*
- ❖ *Websites of Travel Agents / Tour Operators*

Eco-Tourism - The following modes of communication have been adopted for effective communication of eco-tourism to the foreigners:-

- ❖ *Features in Ministry of Tourism's publication "Incredible India"*
- ❖ *Features in Ministry of Tourism's flagship website www.incredibleindia.org*
- ❖ *Websites of Travel Agents / Tour Operators*

Medical Tourism - The following modes of communication have been adopted for effective communication of medical tourism to the foreigners:-

- ❖ *Features in Ministry of Tourism's publication "Incredible India"*
- ❖ *Features in Ministry of Tourism's flagship website www.incredibleindia.org*
- ❖ *Travel publications and journals*

Treatment costs 50-75% less in India, there is no waiting period either. In other countries even critical patients may have to wait for months. As opposed to a normal tourist who spends $50-60 per day, a medical tourist spends $200-300. apart from the hospital visit, Afghans, Bangladeshis and Pakistanis often include a trip to Fatehpur Sikri, while for Europeans and Americans, a trip to the Taj is mandatory. Others detoxify with Ayurvedic therapies.

The government has introduced medical visas to help such tourists, but that's hardly enough. Tour operators say that acquiring such a visa, which allows up to three entries in a year, remains a difficult process.

As medical tourists are usually required to visit the city again for a follow-up treatment, a tourist visa can prove cumbersome. When they need to come a second time, they have to apply for a fresh tourists visa. In case of a medical visa, all that should be needed is documents from the hospital or a medical broker.

The Great India Tour Company began marketing medical tourism from the year 2001 onwards, joining hands with the Kerala Institute of Medical Sciences (KIMS), a 450- bed multi-specialty tertiary care hospital of international standard and reputation. GITC and KIMS have jointly attended international and national tourism marts for the promotion of medical tourism, using excellent promotional material.

KIMS has a department dedicated solely for servicing medical tourism. An entire floor, with state-of-the-art facilities, has been earmarked exclusively for medical tourism patients at KIMS.

Plastic and cosmetic surgery, Maxillo facial surgery, dental treatments, cosmetology voice therapy and obesity treatment are some treatments that have been marketed very well internationally by KIMS and GITC for medical tourism. Apart from modern medicine, KIMS has also introduced Ayurvedic treatment as part of the health tourism package. The tourism services and facilitations are provided by the Great India Tour Company.

KIIMS has also signed memorandums of understanding with seven companies from different countries for the promotion of medical tourism to this part of the world.

Adventure Tourism - The following modes of communication have been adopted for effective communication of adventure tourism to the foreigners:-
   ❖ *Exclusive features in Ministry of Tourism's publication "Incredible India"*
   ❖ *Website named www.exploreruralindia.org*
   ❖ *Websites of prime travel agents*
   ❖ *Travel publications*

Rural Tourism - The following modes of communication have been adopted for effective communication of rural tourism to the foreigners:-
   ❖ *Exclusive features in Ministry of Tourism's publication "Incredible India"*
   ❖ *Website named www.exploreruralindia.org*

MICE Tourism - The following modes of communication have been adopted for effective communication of MICE tourism to the foreigners:-
   ❖ *Websites of prime travel agents*
   ❖ *Travel publications*
   ❖ *Ministry's website www.incredibleindia.org*

Firstly an event organizer has to submit the proposal to the concerned nodal/administrative ministry of the government of India at least eight weeks in advance. This should include the name of the organization hosting the conference; complete postal address; topic to be covered; venue of the event; date of the event and the names of participants with their passport details. After receiving permission to invite guests, the event organizer must indicate that its proposal has been cleared by the nodal ministry to the foreign participants so that they can obtain conference visas from their country.

ICPB was trying to change the requirement for delegates from conference visas to tourist visas so that they could come to India as tourists.

Bureau even helps out with budgets, transportation, accommodation, theme parties, post tours and post evaluation of conferences.

Internet could help as a marketing tool, for instance, sending personal email invites would reduce cost and transfer time. Websites can be an alternative to brochures. Delegates can also fill in registration forms and submit them at the same moment. Event organizers can save these forms online itself

ICPB is trying to be a catalyst by providing support to conference planners, organizations, associations and other trade bodies during the bid process for the international conferences as well as to undertake marketing activities overseas.

Buddhist Circuit - The following modes of communication have been adopted for effective communication of Buddhist Circuit to the foreigners:-

- ❖ *Websites of prime travel agents*
- ❖ *Travel publications*
- ❖ *Campaign in Electronic Media*
- ❖ *Ministry's website www.incredibleindia.org*

4.5   Policy evaluation

4.5.1   Policy on integrated development of tourist circuits and destinations

The financial assistance provided by Ministry of Tourism to the states has not been able to create an impact in terms of creation international standards tourism infrastructure8. Therefore, the national policy has laid emphasis on identification of certain tourist circuits and convergence of resources and expertise to develop the circuits as international standard destinations. In conformation of the recommendations of the policy, the Ministry of Tourism devised a scheme for integrated development of tourism circuits during the 10th five year plan. The objective of the scheme is to identify tourist circuits in the country on an annual basis, and develop them to international standards. The scheme would focus on provision of infrastructural facilities to the tourists in the identified circuits. A synopsis of the State wise no. of projects, sanctioned and released amount for the respective states have been indicated in the Table below.

Table 4.2: List of Sanctioned and Completed Projects – State wise

State/UTs	No. of Sanctioned Projects	No. of Completed Projects	No. of Dropped Projects	No. of Ongoing projects	Sanctioned Amount	Released Amount
Andaman & Nicobar	1	-	-	1	6.25	5
Andhra Pradesh	30	14	-	16	6897.71	5427.39
Arunachal Pradesh	28	5	-	23	4670.66	3618.47
Assam	30	1	-	29	4187.62	3420.74
Bihar	24	4	-	20	4695.15	3933.7
Chandigarh	8	5	-	3	493.45	401.93
Chattisgarh	28	3	-	25	4482.26	3180.96
Dadar & Nagar Haveli	4	2	-	2	37.86	32.38
Daman & Diu	9	2	-	7	581.85	469.01
Delhi	41	18	1	22	4728.27	4498.54
Goa	7	5	-	2	157.26	83.26
Gujarat	19	6	-	13	3612.97	2524.92

(Contd.)

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[8] Statement as per National Tourism Policy 2002

Table 4.2(Contd.): List of Sanctioned and Completed Projects - Statewise

State/UTs	No. of Sanctioned Projects	No. of Completed Projects	No. of Dropped Projects	No. of Ongoing projects	Sanctioned Amount (Lakhs)	Released Amount (Lakhs)
Haryana	39	19	2	18	3059.26	2625.36
Himachal Pradesh	47	19	-	28	5254.19	3904.21
Jammu & Kashmir	34	9	-	25	8499.22	7000.63
Jharkhand	9	-	-	9	3324.09	2546.96
Karnataka	44	13	-	31	7955.01	5519.43
Kerala	43	22	-	21	9278.92	7503.89
Lakshdweep	0	-	-	-	0	0
Madhya Pradesh	52	22	-	30	6055.87	4887.7
Maharashtra	41	20	-	21	5964.08	4889.13
Manipur	7	2	-	5	215.58	186.13
Meghalaya	9	1	3	5	1130.87	884.31
Mizoram	25	7	-	18	4068.62	2543.63
Nagaland	26	4	-	22	5851.16	4083.74
Orissa	26	7	1	18	4427.96	3522.81
Pondicherry	8	2	1	5	1185.16	948.5
Punjab	16	4	1	11	2276.35	1794.12
Rajasthan	44	7	-	37	7788.94	6580.32
Sikkim	43	13	1	29	5011.15	3723.68
Tamil Nadu	52	19	-	33	8486.53	6222.7
Tripura	16	3	-	13	1406.14	791.25
Uttar Pradesh	37	8	-	29	6261.18	5199.93
Uttranchal	26	6	-	20	5765.92	4741.91
West Bengal	31	13	-	18	2960.91	2280.4
Total India	**904**	**285**	**10**	**609**	**140778.42**	**109977**

Source: Rajya Sabha Starred Question No 137, dated 01.08.2006.

The projects indicated above includes Centrally sponsored schemes for development of destinations, tourism circuits, fairs and festivals as well as events in India for the period 2002 – 07. During the period nearly 1407 Crs were sanctioned for the different states out of which 1099 Crs have already been released. 285 of the sanctioned 904 projects have already been completed, while 10 have been dropped. Rest 609 are in different stages of completion. A synopsis of the recently sanctioned projects in different states has been indicated in the following table. A detailed list of projects sanctioned state wise has been enclosed in the Annexure.

Table 4.3: Statewise No. of projects sanctioned and funds released

State/UTs	2004-2005			2005-2006 (As on 13.02.2006)		
	No. of Projects Sanctioned	Amt. Sanctioned (In Rs. Lakhs)	Amt. Released (In Rs. Lakhs)	No. of Projects Sanctioned	Amt. Sanctioned (In Rs. Lakhs)	Amt. Released (In Rs. Lakhs)
Andhra Pradesh	15	2827.89	2315.68	4	2505.82	1604.5
Assam	6	956.03	741.42	8	2125	1686.45
Arunachal Pradesh	6	1285.7	905.52	10	2240.16	1655.21
Bihar	7	1901.43	1527.71	1	768.12	614.5
Chhatisgarh	5	1117.94	884.85	5	1252.87	1002.56
Goa	3	110	38	1	10	8
Gujarat	2	138.93	111.14	3	1253.31	562.64
Haryana	6	693.55	562.93	5	612.45	506.51
Himachal Pradesh	10	2680	2152	4	1635	908
Jammu and Kashmir	6	878.45	707.16	22	6656.01	5320.91
Jharkhand	2	945.91	756.72	3	11.7	9.36
Karnataka	12	2459.76	1937.37	6	1648.23	969.57
Kerala	9	2233.63	1780.33	11	4829.88	3865.3
Madhya Pradesh	10	1547.19	1204.19	11	3037.39	2419.54
Maharashtra	9	1650.69	1189.28	8	2070.04	1657.99
Manipur	2	78.1	77.45	1	25	20
Meghalaya	2	963.3	807.91	1	5	4
Mizoram	4	1086.35	377.88	9	2268.41	1686.29
Nagaland	6	2235.69	1404.4	9	2528.97	1873.17
Orissa	7	1339.18	1050.03	8	1200.47	960.37
Punjab	5	714.68	587	2	10	8
Rajasthan	9	2387.35	1812.23	5	2084.69	1680.66
Sikkim	5	650.81	520.33	14	2844.56	2213.74
Tamil Nadu	7	1308.92	1050.72	18	4144.08	2976.06
Tripura	1	20	16	3	716.26	569.43
Uttaranchal	6	2184.98	1743.23	12	2723	2178.18
Uttar Pradesh	9	1044.93	831.69	15	3124.22	2497.92
West Bengal	10	513.04	408.43	2	975	780
Andaman and Nicobar	0	0	0	0	0	0
Chandigarh	2	462	370.6	0	0	0
Dadra and Nagar Haveli	0	0	0	2	29.79	25.92
Delhi	7	613.85	501	2	30	2
Daman and Diu	0	0	0	3	182.7	144.95
Lakshadweep	0	0	0	0	0	0
Pondicherry	3	462.73	370.56	2	469.39	375.51
India	**193**	**37493.01**	**28740.76**	**210**	**54017.52**	**40809.24**

Source : Lok Sabha Starred Question No. 82, dated 23.02.2006.

The aforesaid Table indicates the fact that there has been a stupendous rise in the no. of projects sanctioned in the period 2005-06 compared to the period 2004-05 (in the tune of 8.8%). The amount

sanctioned during the period has witnessed a growth of 44.1% during the period. The amount released too has increased by 42% for the period 2005-06.

In the Tourism Perspective Plans, certain states have identified the major products which are attracting tourists at present. The products are mainly destinations or circuits; however some states have categorized their products into themed attractions. Some states, especially the northeastern states are not having any major products at present which attract tourists. The Plans focus on development of the identified destinations and circuits through infrastructure development, enhancement of tourist facilities, promotion and packaging.

4.5.2   On private public participation in development of tourism infrastructure

The tourism policy recognized that there is huge deficit in availability of basic infrastructure which cannot be met by public funding alone and hence there is need to attract private sector in infrastructure enhancement. One of the basic principles of the tourism policy was to evolve an institutional framework for tourism development which would be Government led and private-sector driven. The government would act as a facilitator in terms of providing a regulatory framework for tourism industry, ensuring safe environment for tourists and creation of basic infrastructure. The private sector would provide the financial and infrastructural impetus for the industry and be the key service provider. The Ministry of Tourism, keeping in view the recommendations of the policy devised a scheme to support Private Public partnerships in infrastructure (also known as Viability Gap Funding). The key points of the scheme are:

- Encourage private sector investment in infrastructure projects through Public Private Partnership (PPP)
- Granting full autonomy to the private sector in implementing the projects i.e. develop, finance, construct, maintain and operate
- Provision of certain amount of government funding in the PPP projects
- Establishment of a transparent procedure for allocation of the projects to the private sector

The various states have also recognized the importance of public private partnership in tourism infrastructure development. Some states have already incorporated PPP in their respective tourism development plans and policies, while some are in process of doing so. Some of the key states which have incorporated PPP as part of their plans are:

- ❖ **Kerala** – The tourism perspective plan for Kerala recognized the importance of PPP and one of the key strategies of the plan is to develop Tourism infrastructure and product through private sector and private-public partnership, with government acting as a facilitator and catalyst. One of the long term goals of the Tourism Action Plan is to ensure withdrawal of government from direct running of all tourism business activities.

- ❖ **Delhi** – The tourism perspective plan emphasizes private public partnerships in heritage conservation. The plan talks of handing over the maintenance and upkeep of the monuments to private sector through public private partnership.

- ❖ **Karnataka** - The tourism perspective plan envisages private investment in tourism infrastructure projects through various PP partnerships. The projects identified for PPP are hotels, tourist information centers, landscaping at tourist attractions, signage at tourist attractions and transportation facilities.

- ❖ **Rajasthan** – One of the prime objectives of state tourism policy is to encourage the role of private sector in tourism infrastructure development. One of the key areas in which the state intends to promote private investment is the hotel industry.

- ❖ **Madhya Pradesh** – The state government tourism policy encourages participation of the private sector in heritage conservation. The Government of Madhya Pradesh is keen to develop 'Heritage Sites', turning them into Heritage Hotels, set up in properties owned by the State Government or by Princely houses. The State Government is keen to set up Joint Venture Companies and offer these properties to be managed by the private sector.

- ❖ **Orissa** – The state tourism policy encourages non-government sectors to participate in tourism development in different sectors.

- ❖ **Uttaranchal** – One of the key objectives of the state tourism policy is to encourage private sector participation. The action plan incorporates formulation of a strategy for mobilizing private sector participation and investment in the tourism sector.

- ❖ **Andaman & Nicobar Islands** – The tourism perspective plan has envisaged PPP for the tourism industry in various ways such as 100% private investment in various projects, joint venture with state initiatives, Consortium investments, technical Tie-ups for specialized activities, outsourcing of certain modules (Event Management promotions / presentations etc However, at present, only joint venture with government to run state owned assets and outsourcing event management / promotional campaigns are being pursued and moreover. 100% private investments are largely restricted to hotels/ resorts / pure entertainment projects.

4.6   Promotional Issues

4.6.1   Steps taken to promote India as an unique destination

The National Tourism Policy laid out a comprehensive product development and marketing strategy for tourism development. The strategy emphasized focusing on the distinct and unique features of the country and differentiating itself from the competing destinations. It identified the need to create a brand image for India which would present a distinct image of the country to the international travelers. In conformation with the recommendations, Ministry of Tourism initiated the "Incredible India" campaign in December 2002. The campaign promotes India as a unique destination having a distinct cultural heritage. Further, it draws attention to the diversity of the country and the myriad experiences it can offer to a traveler. The main features of the promotional campaign have been:

1. Creation of a brand image for India for the international market
2. Establishing and promoting an ensemble of products to attract the different categories of travelers in the key source markets
3. Sustained marketing and promotional efforts in the key source markets abroad
4. Marketing and promotion through a multitude of communication tools (print media, electronic media and internet).

The campaign projected one distinct image of "Incredible India" in the international market. A major initiative of the campaign has been to integrate the various key players of the tourism industry and present them as one entity in promotion and marketing; the marketing campaigns offer information not only on the destinations but also the facilitation services and the service providers. As part of the campaigns it has identified and promotes certain products for the key target customers in its campaigns, which are:

*   Adventure Sports
*   Cool Retreats
*   Deserts
*   Eco Tourism
*   MICE
*   Luxury Trains
*   Beaches of India
*   Pilgrimages & Spirituality
*   Royal Retreats
*   Wellness
*   Wildlife
*   Heritage Sites

The Ministry has been pursuing the campaign in the international market in a sustained manner since its inception in 2002 and has also constantly innovated on the marketing strategies. It has utilized a plethora of mediums such as the internet, electronic media (television as well as radio) and print for its promotional campaigns.

The interest & the goodwill that the Incredible India campaign has created has to be sustained. In a move that could increase the numbers of high end visitors, the Ministry has rolled out an integrated communication strategy for branding India as an attractive tourist destination of choice for discerning travelers.

The campaign -electronic, print and net spearheaded by TV commercials on international channels on BBC & CNN, is aimed to relauch India's image and to acquaint international travelers with a variety of experiences. The international electronic media campaign shows the different faces of India's rich cultural heritage and geographical diversity. The new commercials are focused on the six pillars of Indian tourism.

- Health & beauty
- Modern art
- Golfing
- Fashion & shopping
- Cuisine
- Nightlife &Hip hotels

4.6.2   To attract foreign tourists to different states

The incredible India campaign of the Ministry of Tourism primarily focuses on attracting foreign tourists. One of the key components of the campaign is promoting the cultural diversity and uniqueness of the different states. The idea is to create an interest in the minds of the foreign traveler for the individual states.

The promotional strategies and campaigns of each state to attract foreign tourists vary considerably. While some of the states have formulated promotional strategies in their tourism perspective plans and policies, others are yet to come out with any tangible plans. The promotional issues and strategies of individual states have been described in detail in the table below:

Table 4.4: State wise promotional strategy

State	Promotional Strategy
Kerala	The promotional strategy and campaign of the state focuses on the naturally available resources such as backwaters, ayurveda, performing arts and cuisine to create a distinct image for the international market.
Delhi	The state tourism promotional strategy and campaign emphasizes on the rich cultural heritage of the city to attract foreign tourists.
Bihar	The perspective plan of Bihar recognized that due to the security perception of the state, the priority of the tourism promotional strategy should be on creating a positive image of the state in order to attract both foreign and domestic tourists.
Chandigarh	The tourism perspective plan emphasizes promoting the state as leisure and recreation destination for both foreign and domestic tourists
Assam	The promotional strategies of the state have emphasized on creating a positive image of Assam and subsequently focus on the natural beauty and resources to attract tourists.
Karnataka	The state perspective plan outlines a promotional strategy which focuses on the cultural heritage and natural beauty of the state to attract tourists.
Jharkhand	The state at present does not have a clear promotional strategy to attract foreign tourists.

Table 4.4: State wise promotional strategy

State	Promotional Strategy
Andaman & Nicobar Islands	The union territory's promotional strategy focuses on the rich natural resources and marine wealth to attract foreign tourists. The promotional campaign is targeted to attract high end foreign tourists.
Daman & Diu	The union territory is positioning itself as a distinct heritage and natural beauty destination. The USP of Daman is "Waterfront Tourism in the Heritage backdrop"
Meghalaya	The state at present does not have clear promotional strategy to attract foreign tourists.
Mizoram	Owing to the restrictive entry regulations in the state for foreign tourists, the state at present does not have clear promotional strategy to attract foreign tourists.
Pondicherry	The promotional strategy and campaign focuses on the distinct spiritual and cultural heritage of the region. The emphasis of the campaign is Auroville, the spiritual ashram founded by Shri Aurobindo.
Dadra & Nagar Haveli	The tourism perspective plan of the state primarily focuses on attracting the domestic tourists.
Maharashtra	Maharashtra Tourism Development Corporation (MTDC) is currently engaged in promoting Maharashtra as a dynamic state using the punch line" Maharahstra unlimited". The image builds upon the international corporate image of Maharashtra, particularly Mumbai and goes further to suggest that, in addition to the business and industry gamut, the state also offers a variety of tourism themes for all kinds of tourists.
Andhra Pradesh	The state tourism department is promoting Andhra Pradesh as a historically and culturally rich state using the punch line" Andhra Pradesh-Kohinoor of India". It is offering a plethora of products which aims to cater to a diverse category of tourists. One of the distinct products is medical tourism.

Table 4.4: State wise promotional strategy

State	Promotional Strategy
Arunachal Pradesh	The state has restrictive entry policies for both domestic and foreign tourists. Presently the tourism department of the state is promoting the state as a .place of rich bio-diversity. It does not have any specific promotional strategy or campaigns to attract foreign tourists.
Goa	Goa Tourism Development Corporation is promoting the state as a leisure and cultural destination of international standards. It has developed tour packages to cater to different category of tourists and is the only state offering cruises for travelers.
Gujarat	The state tourism department is promoting Gujarat as a rich cultural destination having a diverse array of attractions using the punch line "Vibrant Gujarat". The promotional campaign focuses on the cultural richness of the state to attract foreign tourists.
Haryana	The state tourism department is selling four themes to attract tourists: pilgrim tourism, golf tourism, adventure tourism and Surajkund Craft Mela. The promotional campaign mainly focused on attracting domestic tourists.
Himachal Pradesh	The state tourism department is promoting a plethora of products to attract tourists. However, there is lack of clear promotional strategy or campaign at present to target the international market.
Jammu & Kashmir	The state tourism department has not yet developed any distinct products for tourism promotion. It is mainly promoting three destinations: Jammu, Kashmir and Ladakh. Moreover, there is lack of any promotional strategy or campaign to attract foreign tourists.
Madhya Pradesh	The state's promotional campaign builds upon the popularity of Khajuraho temples and focuses on the culture and history of the state to attract foreign tourists.
Manipur	The state lacks a clear strategy and campaign to attract tourists.

Table 4.4: State wise promotional strategy

State	Promotional Strategy
Nagaland	The state lacks any clear strategy and campaign to attract tourists.
Orissa	The tourism promotional strategy to attract foreign tourists focuses on two themes: natural resources and history. The tourism department has developed a number of products based on these two themes to target the different categories of foreign tourists
Rajasthan	The state promotional strategy and campaign focuses on the cultural heritage of Rajasthan. The promotional campaign has formulated some key products building upon the main theme to attract foreign tourists.
Tamil Nadu	The tourism promotional campaign of the focuses on the culture and natural resources. One of the distinct products being promoted by the state to attract foreign tourists is medical tourism.
Uttar Pradesh	The promotional strategy an campaign builds upon the popularity of Taj Mahal and focuses on the cultural heritage of the state to attract foreign tourists.
Uttaranchal	The state is promoting three main themes for tourists: Pilgrim, Nature and Adventure. The state intends to attract foreign tourists on the strength of its natural beauty and adventure tourism facilities
Tripura	The state lack any clear promotional strategy or campaign to attract foreign tourists
Sikkim	The state lack any clear promotional strategy or campaign to attract foreign tourists
West Bengal	The tourism promotional strategy builds upon the popularity of Kolkata as a cultural hub of India. The state is focusing on its cultural heritage and natural beauty to attract both domestic and foreign tourists.

Table4.4: State wise promotional strategy

State	Promotional Strategy
Punjab	The promotional strategy focuses on the distinct sikh heritage of the state. It has developed a pilgrim circuit for domestic tourists. However, there is lack of promotional strategy or campaign to attract foreign tourists.
Chhattisgarh	The state tourism department is focusing on the distinct cultural heritage and natural resources to attract tourism. The state tourism department is mainly focusing on eco-tourism and ethno-tourism. However, presently, it does not have any specific promotional strategy to attract foreign tourists.
Lakshwadeep	The union territory is yet to initiate a promotional campaign for tourism. However, the tourism perspective plan emphasizes on capitalizing the rich natural resources and marine wealth for tourism development.

Cleaning-up and beautification exercises at places of tourist interest had to be undertaken by the respective municipal committees and the ministry of tourism could only be a facilitator and guide. Underlining the fact that clean and beautiful tourist destinations would have ripple effects like drawing more tourists and generating employment. While the makeover plans for the tourist hotspots are only one part of the strategy to woo visitors, on its part, the government has put into action a blueprint for urban renewal, which will ultimately help to bring in business tourists from within the country and abroad. The urban renewal scheme, announced by Prime Minister Man Mohan Singh, at the end of last year, focuses on upgrading urban infrastructure, civic services, community participation and accountability of local governments as part of the decentralization of urban governance. It has a provision for disbursing funds to upgrade the infrastructure of 63 selected cities. A total of Rs 550 bn has been earmarked for the project and will be disbursed over seven years. The initial phase of the programme will see the five cities of Ahmedabad, Rajkot, Hyderabad, Nagpur and Bhopal undergoing a facelift with world-class infrastructure and civic amenities. While the central government shall provide upto 50%of the total project cost, the remaining will be raised by the states and local city administrations.

4.7   Policy to make a domestic tourism product popular across the country

One of the major drawbacks to tourism growth identified in the National Tourism Policy is neglecting of the domestic tourism market in favor of international market. The Policy underlined importance of commerce generated by domestic tourism and specific focus required to develop this market. Some states have initiated action to jointly develop tourism and target the domestic tourists across the states. The key steps undertaken by various states to make domestic tourism product popular across the country are:

❖ Orissa Tourism Development Corporation (OTDC) signed MoU with Kerala Tourism Development Corporation (KTDC) for marketing and publicizing their unique tourism products and to increase tourist arrivals in both the states. Both the states intend to formulate joint packaging of complimentary tourism products that would provide greater variety to tourists. OTDC has also signed MoUs with Tamil Nadu, Karnataka, Goa, Gujarat, Bihar, West Bengal and India Tourism Development Corporation (ITDC) for tourism promotion and marketing.

❖ Karnataka and Andhra Pradesh signed MoU to develop tourism jointly in the region. There is understanding between the two states regarding cultural exchange programmes, eco-tourism development, organizing package tours and booking facilities.

❖ Andhra Pradesh Tourism Development Corporation (APTDC) and Goa Tourism Development Corporation (GTDC) have agreed upon utilizing each other's facilities and infrastructure for marketing of tourist destinations of both the states.

❖ Rajasthan and Kerala tourism departments have signed MoU for joint marketing and publicity of each other's tourism products.

❖ Rajasthan and Punjab tourism departments have signed MoU for developing and organizing inter-state package tours with the objective of promoting domestic tourism in both the states

❖ Maharashtra and Uttar Pradesh tourism departments have signed MoU for promotion of various tourism destinations of the respective states through special package tours incorporating each other's facilities.

❖ Maharashtra and West Bengal tourism departments have signed MoU for promotion of tourism destination of the respective states.

4.8   Setup in the State / Central Government to promote tourism

The Ministry of Tourism is the nodal agency responsible for tourism development in the country. It plays a fundamental role in formulating policies, coordinating the activities of central government agencies, state governments/UTs and the private sector for the development and promotion of tourism. The Ministry is headed by the Union Minister of Tourism while the administrative head is the secretary (Tourism). One of the major functions of the Ministry is Publicity and Marketing of tourism in India and abroad. The activities carried out by the Ministry under Publicity and Marketing is:

- Policy Formulation
- Strategy Formulation
- Co-ordination
- Supervision

The Ministry has a field formation of 20 offices within the country and 18 offices abroad and one sub-ordinate office/project. The overseas offices are primarily responsible for tourism promotion and marketing in their respective areas and the field offices in India are responsible for providing

information service to tourists and to monitor the progress of field projects. The promotional strategy and campaigns of the individual states is undertaken by the respective state tourism departments.

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                        ┌─────────────────────────────┐
                        │   Tourism Promotion Set-up  │
                        └─────────────────────────────┘
          ┌──────────┐                    ↓                    ┌──────────┐
          │  Centre  │◄───────────────────────────────────────►│  State   │
          └──────────┘                                         └──────────┘
               ↓                                                     ↓
     ┌───────────────────────┐                          ┌──────────────────────────┐
     │  Ministry of Tourism  │                          │ State Tourism Department │
     └───────────────────────┘                          └──────────────────────────┘
          ┌─────┴─────────────┐
          ↓                   ↓
  ┌────────────────┐  ┌────────────────────┐
  │ Overseas Office│  │ India field Office │
  └────────────────┘  └────────────────────┘
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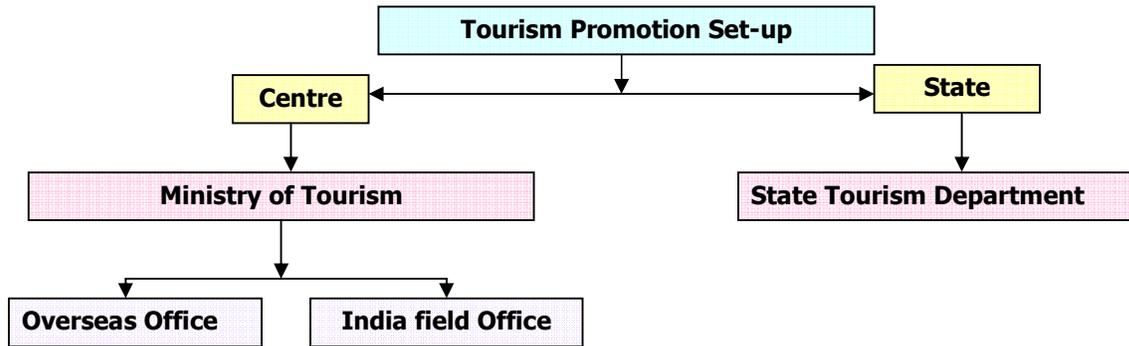
The Ministry of Tourism operates 18 offices in 17 countries abroad for tourism promotion and marketing. The location of the various India Tourism Offices is given in the table below:

Table 4.5: India Tourism Offices Abroad

Country	City
Argentina	Buenos Aires
Australia	Sydney
Canada	Toronto
France	Paris
Germany	Frankfurt
Israel	Tel Aviv
Italy	Milan
Japan	Tokyo
Netherlands	Amsterdam
Singapore	Singapore
Spain	Madrid
Sweden	Stockholm
UAE	Dubai
U.K.	London
U.S.A.	New york
	Los Angeles
Russia	Moscow
South Africa	Johannesburg

Source: Ministry of Tourism

In addition, the Ministry of Tourism also operates tourist offices in India for providing assistance and information service for tourists. The offices are located in the following destinations:

- Agra
- Bhubaneshwar
- Mumbai
- Kolkata
- Cochin
- Guwahati
- Hyderabad
- Port Blair
- Shillong
- Thiruvananthapuram
- Imphal

- Jaipur
- Varanasi
- Khajuraho
- Chennai
- Naharlagun
- New Delhi
- Panaji
- Patna
- Aurangabad
- Bangalore

4.9   Bottlenecks faced

4.9.1   In relation to the Tourism products

Cultural tourism - Cluttered information from so many websites, so many sources before a foreigner lands in India. The same needs to be streamlined.

Wildlife Tourism - The immense resource that India has to offer is not being utilized to the best of its potential. Majority of locations are not well developed, lacks connectivity, or are not being promoted to the fullest possible extent.

Eco-Tourism - No clear line of demarcation does not exist between Eco – tourism and other modes of tourism that is being promoted for the foreign tourists. The wilderness of a forest combined with localities / tribal lifestyle can specifically promote Eco- Tourism in India. A large no. of destinations can be promoted compared to the current bouquet of offerings. The promotion at present is somewhat scattered.

Medical Tourism - This is a sunrise sector in Indian tourism. As far as Hi-tech Healing is concerned, people from neighboring countries keep thronging in. The Spa's, Ayurveda and Yoga are really the strongholds, which needs to be marketed more aggressively

Adventure Tourism - Some modes of adventure tourism is yet to be developed properly in the Indian context. But commendable efforts have been put forth with regard to some locations like Goa and Kerala.

Rural Tourism - No mention on the Ministry of Tourism's flagship website www.incredibleindia.org. or linkage to the website which explains rural tourism in India more vividly

MICE Tourism - Still to evolve considering the mileage taken by South East Asian countries (like Malaysia, Singapore etc) in developing and promoting the product. Lacunae exists in certain pockets with regard to promotion as well as infrastructure.

Buddhist Circuit - None as such. Connectivity needs to be improved. Communication about locations needs to be strengthened. The managers of hotels play the role of prime influencers/ suggestion makers to the visiting foreign tourists. A communication program needs to be developed involving these prime influencers

4.9.2   Policy Matters

The significance of recommendations and strategies of the National Tourism Policy are not being realized by all states. While, some of the states have followed the key recommendations of National Tourism Policy and have formulated Perspective Plans; others have formulated their distinct state tourism policies and plans.

4.9.3   Promotional Issues

There is lack of an integrated campaign by the central government and states for tourism promotion. While the Ministry is going ahead with "Incredible India" campaign, the states have their own distinct campaigns which do not co-relate with the central government campaign. Further, there is lack of co-ordination between Ministry of Tourism and state tourism departments for publicity and marketing in terms   of   financial   or   tactical   assistance.

5.1   Overview

This chapter intends to have a deeper introspection of the available infrastructural amenities in the current context. Rail, Road and Air connectivity of prime tourist locations, policies and proposed steps have been discussed in the subsequent pages.

5.2.   Prelude

In order to achieve the goal of 10 million foreign tourists by 2010 as envisioned by Government of India, we need to build a strong base of basic and supporting infrastructure. The infrastructure prerequisites for tourism industry can be broken down into two basic types:

- *Internal infrastructure* – This implies to the basic and supporting infrastructure requirements within our country (such as rail, road and air infrastructure, accommodation facilities, etc.)
- *External infrastructure* - Inter country travel requires exhaustive procedures and processing. Passport and Visa facilitation, inter-country regulatory frameworks and policies are some of the components of external infrastructure.

Evaluation of the internal as well as the external facets of infrastructure has been dealt in with in this chapter.

5.3.   Rail Network

The rail network in India is the largest in Asia and one of the 4th largest in the world; the routes cover a total length of 63,140 Km. The Indian Railways runs the entire railway network and operations in the country. It has divided the entire rail network in to 16 zones for administrative purposes:

Table5.1: Zones of Indian Railway and their Headquarters

Zone of Indian Railways	Headquarters
Northern Railway	Delhi
North Eastern Railway	Gorakhpur
Northeast Frontier Railway	Maligaon (Guwahati)
Eastern Railway	Kolkata
South Eastern Railway	Kolkata
South Central Railway	Secunderabad
Southern Railway	Chennai
Central Railway	Mumbai
Western Railway	Mumbai
South Western Railway	Hubli
North Western Railway	Jaipur
West Central Railway	Jabalpur
North Central Railway	Allahabad
South East Central Railway	Bilaspur, CG
East Coast Railway	Bhubaneswar
East Central Railway	Hajipur
Konkan Railway	Navi Mumbai

The map below depicts the zones and rail network in India and also vividly focuses upon the interconnectivity of different regions as well.

Figure 5.1: Railway Network Map of India
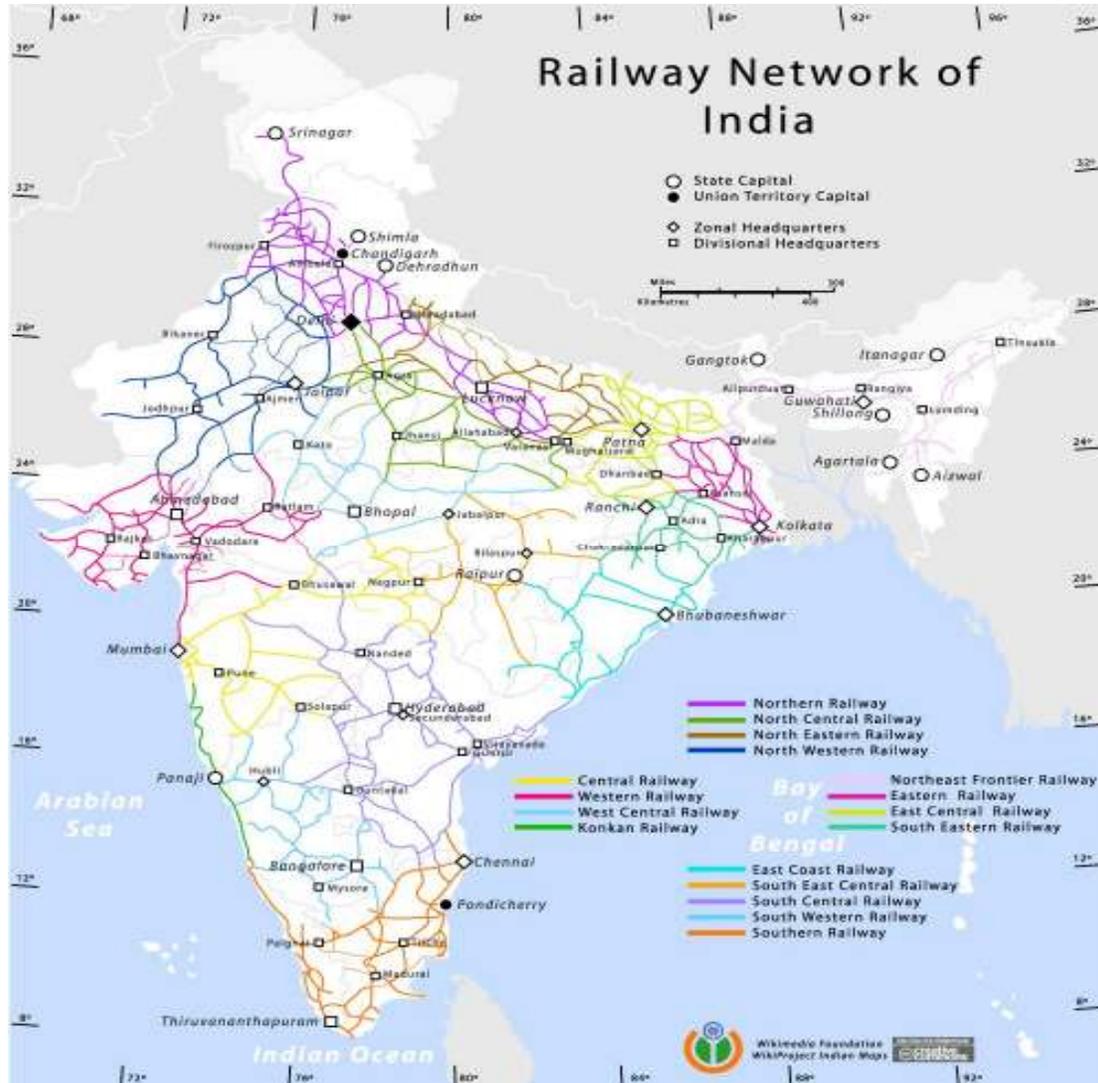
Indian Railways operates 8,702 passenger trains and transports around five billion annually. It is the most economical as well as the most preferred mode for long distance travel in the country.

5.3.1.   Facilities for foreign tourists

5.3.1.1. Tourist Bureau

The Indian Railways has a wide range of facilities for foreign tourists. It has established International Tourist Bureaus at various important cities all across the country to provide assistance to the foreign tourists and NRIs regarding enquiries, booking, reservation and travel planning etc. In Northern Railway, the bureaus are located in the following cities:

- New Delhi
- Agra-Cantt.
- Kolkata
- Mumbai
- Chennai
- Bangalore
- Ahmedabad
- Secunderabad
- Jaipur
- Jodhpur
- Varanasi
- Aurangabad
- Rameshwaram
- Vadodara
- Vasco-da-gama

5.3.1.2. Reservation Quota

A separate reservation quota exists for the foreign tourists traveling from one destination to that of the other. A tourist on production of passports may avail reservation in prime trains (includes superfast as well as mail/ express trains) across various routes. This quota is available at various stations across the country. Foreign visitors can also avail online booking using credit/ debit cards.

5.3.1.3. Indrail Passes

The railways also offer special passes for international tourists, called "Indrail Pass". Indrail Passes offer visitors on a budget, the facility of travel as they like, over the entire Indian Railways system, without any route restriction within the period of validity of the ticket. These passes can only be purchased by foreign nationals and NRIs on payment of U.S. Dollars, Pound Sterling and other convertible foreign currencies. The pass holder is not required to pay any reservation fee, super fast charges or surcharge for the journey. The validity period and fare structure of Indrail pass are:

Table 5.2 : Indrail Passes period of validity and Fare Structure

Period of validity	AC Class		First Class/ AC 2/3 Tier/ AC Chair Car		Sleeper Class/(Non - AC)	
	Adult	Child	Adult	Child	Adult	Child
½ day*	57	29	26	13	11	6
1 day*	95	47	43	22	19	10
2 day*	160	80	70	35	30	15
4 day*	220	110	110	55	50	25
7 day	270	135	135	68	80	40
15 day	370	185	185	95	90	45
21 day*	396	198	198	99	100	50
30 day*	495	248	248	126	125	65
60 day*	800	400	400	200	185	95
90 day*	1060	530	530	265	235	120

The passes are sold through the International Tourist Bureaus in the country, General Sales Agents abroad, Indian Airlines and Air-India's overseas outlets at Oman, Australia, Malaysia, UK, Germany, Finland, UAE, Bangladesh, South Africa, Kuwait, Bahrain, Thailand, Myanmar, Singapore, Nepal and Sri Lanka.

5.3.1.4. IRCTC Specials

Certain luxury trains have been started in collaboration with the different State Governments like Rajasthan, Maharashtra, Gujarat, IRCTC and the Indian Railways. The Palace on Wheels, Deccan Oddessey have been a run away success amongst the foreign tourists. Similarly the heritage toy trains of Darjeeling as well as Shimla has been instrumental in creating impeccable impact in the minds of the foreigners and has attracted them from the different parts of the globe. A synopsis is presented below

The IRCTC and Indian Railways have come out with special packages for tourists. It offers exclusive Hill Steam Rail Charters on

- **Darjeeling Himalayan Railway** - IRCTC offers exclusive charters for Tourists on the Darjeeling Himalayan Railway, a UNESCO World Heritage site since 1999. The ride on the exclusive Steam hauled tourist train has a choice of 2 different compositions: Steam Loco + 2 First Class Coaches (FC) or Steam Loco + Dining Car + 1 First Class Coaches (FC) The remarkable ride on the 2 ft. gauge line is an amazing and spectacular journey with breathtaking views of the Himalayan peaks. The DHR, opened in 1880, provides an enchanting journey from the plains of Siliguri to Darjeeling. En route the rail line passes through the mountains to reach Kurseong and Ghum (the highest narrow gauge rail station in the world.) IRCTC offers excellent charter rates on the DHR.
- **Neral – Matheran Hill Railway** - Matheran situated close to Mumbai and Pune and has the unique distinction of being free from vehicular traffic. The 21 km hill railway connecting Neral on the plains to Matheran brings forth panoramic views of the hill ranges. The vintage steam loco will haul the charter train to enable tourists watch the changing scenic beauty enroute and also enjoy the flora during long walks in Matheran.

- **Kalka – Shimla Hill Railway** - Shimla, the capital of Himachal Pradesh and the former summer capital of British India, offers a breathtaking view of the Himalayan peaks The exclusive tourist charter hauled by a vintage steam locomotive in its classical livery allows the tourists to savor the scenic beauty of the Himalayas. **Nilgiri Mountain Railway** - The Nilgiris properly called Nila-giri or Blue Mountains are known for their coffee and tea plantations. Udhagamandalam, the Queen of Hill Stations and popularly called as Ooty is a major tourist attraction. The beautiful botanical gardens, the Ooty Lake, the children's lake garden near the Railway stations, Doddabetta. Coonoor and Kotagiri are the important scenic spots on the Blue Mountains. The Nilgiri Mountain Railway journey is a breathtaking delight on the Blue Mountains passing through tunnels, across tall girder bridges, forest clad mountains, between tea plantations on a ride that will always be cherished. Boasting of the only rack and pinion system in Asia to overcome the steep gradient, the 45.88 km route connects Mettupalayam on the plains with Ooty at an attitude of 2203 meters above sea level, the queen of hill stations via Coonoor, passing through 16 tunnels, 250 bridges and 216 curves. **Jatinga Steam Safari (North Â– East Frontier Railway)** -- The Jatinga Steam Safari has been promoted by the Northeast Frontier Railway to enable tourists to savor the scenic beauty of one the most spectacular mountain lines on Indian Railways.

The Indian Railways runs luxury trains especially for foreign travelers; these trains take tourists to destinations of historical significance and immense natural beauty. The details of the luxury trains presently run by the railways are given in table below:

Table 5.3 : IRCTC Specials – at a glance

Train	Schedule	Tariff	Facilities	Destinations
Palace on Wheels	The train takes travelers on a 7 day trip through some culturally and historically significant destinations in Rajasthan and Uttar Pradesh.	Tariff includes cost of travel, catering, conducted sightseeing tours in deluxe coaches, entrance fee for monuments, cultural entertainment and boat ride to Lake Palace Hotel at Udaipur. The tariff varies for different seasons. The tariff for 2006-2007 season is as follows: **October to March** :- Single occupancy (per night): US $ 535 Double occupancy (per night): US $ 385 Triple occupancy (per night): US $ 318 **September to April :- -** Single occupancy (per night): US $ 395 Double occupancy (per night): US $ 295 Triple occupancy (per night): US $ 240	The Palace on wheels has been designed to suit modern needs. Some of the facilities the train is equipped with are: ♦ Central air conditioning ♦ Interconnected telephone system in the train ♦ Separate pantry and lounge in each coach ♦ Coupes having private attached bathrooms ♦ Two special restaurant - Maharaja and Maharani, serving exotic Indian, continental and Rajasthani cuisine ♦ Well stocked bar ♦ Reading and relaxing coach ♦ Personalized attendants round the clock.	The train takes the travelers to the following destinations: ♦ Jaipur ♦ Chittorgarh ♦ Udaipur ♦ Sawai Madhopur ♦ Bharatpur ♦ Agra

Table 5.3 : IRCTC Specials – at a glance

Train	Schedule	Tariff	Facilities	Destinations
Fairy Queen	The Train takes travelers on a two day journey to Alwar and Sariska Tiger Reserve. The Train service is operational only for two months in a year (generally in the winter months). In 2005, the train service was available in the months of January and February	The Fairy Queen Round Trip Tariffs are as follows: Adults – Rs. 7500/- US$ 165 Children – Rs. 3570/- US$ 83 The tariff is inclusive of food, accommodation, and sightseeing charges to Sariska Tiger Reserve.	The Fairy Queen Train has air conditioned coaches which are fitted with adjustable chairs/seats.	The train travels to Alwar from where tourists are taken to Sariska Tiger Reserve by other modes.
Deccan Odyssey	The train takes travelers on an 8 day trip to major destinations of historical importance and immense natural beauty in Deccan Plateau. The train travels through the states of Maharashtra and Goa,	The cost of 8 day package varies for every season. The tariff for October 2006 to March 2007 are as follows: Single Occupancy – US$ 485 per person per night Double Occupancy – US$ 350 per person per night Triple Occupancy – US$ 285 per person per night Presidential suite – US$ 950 and US$ 700 per person per night on single and double occupancy respectively	The Deccan Odyssey is fully air conditioned and has 44 suites in 11 cars which include 4 presidential suites in 2 cars. The Train is also equipped with 2 restaurant cars, 1 bar car, 1 conference car with business centre and 1 spa car. The other facilities in the train the train is equipped with are: ◆ Foreign Exchange Facilities ◆ 24 hour room service ◆ Valet Attendant ◆ FAX, STD and ISD facilities in the conference car	The train takes the travelers to the following destinations: ◆ Mumbai ◆ Jaigad ◆ Ganapatipule Ratnagiri ◆ Sidhugarh ◆ Tarkali ◆ Sawantwadi ◆ Goa ◆ Pune ◆ Aurangabad ◆ Ajanta ◆ Nashik

Table 5.3 : IRCTC Specials – at a glance

Train	Schedule	Tariff	Facilities	Destinations
Royal Orient	The train takes travelers on an 8 day trip through some culturally and historically significant destinations in Gujarat and Rajasthan.	The tariff for traveling on Royal Orient are as follows: October to March :- For 2 Berth Cabin - Single occupancy (per day): US $ 350 Sharing (per day): US $ 200 For 3 Berth Cabin – Sharing (per day): US $ 175 **September to April :- -** For 2 Berth Cabin -Single occupancy (per day): US $ 263 Sharing (per day): US $ 150 For 3 Berth Cabin -Sharing(per day): US $ 132	The Royal Orient is fully air conditioned and has 13 cabins and saloons. The cabins have spacious baths attached to them, equipped with running hot and cold water. In addition to this there are multi-cuisine restaurants and a bar on board. Library facilities are also available on the train.	train destinations: ♦ Chittorgarh ♦ Udaipur ♦ Junagarh ♦ Veraval ♦ Sasangir ♦ Dilwara ♦ Palitana ♦ Sarkhej ♦ Ahmedabad ♦ Jaipur

Backed by the global success of the Palace on Wheels, Rajasthan Tourism Development Corporation and Indian Railways introduced "The Heritage on Wheels" in 2006, a luxury tourist train on meter gauge

which would take tourists to the unexplored regions of Bikaner and Shekhawati in Rajasthan. The details of the new train service are as follows:

- Tour Duration: 3 Nights / 4 Days
- Places Covered: Jaipur - Bikaner - Haat - Gajner - Tal Chhapar - Ramgarh - Nawalgarh - Mandawa – Jaipur
- Tariff – The details of tariffs are as follows:
  a. Feb 2006 to March 2006(per person per night)
    - Single occupancy - US $300
    - Double occupancy - US $200
    - Triple occupancy - US $150
  b. Oct 2006 to March 2007(per person per night)
    - Single occupancy - US $300
    - Double occupancy - US $200
    - Triple occupancy - US $150

5.3.1.5. Online Bookings

The website of Indian railways provides comprehensive information on the luxury trains which include details of journeys, tariffs and booking procedures. Additionally, some of the trains (such as Palace on Wheels, Deccan Odyssey and Heritage on Wheels) have their own exclusive websites which provide complete information to the tourists and also offer online booking facilities.

The IRCTC has also come out with special tourist trains called "Village on Wheels" especially catering to families and budget travelers. These are full length special trains running round the year which will take travelers to destinations of religious and tourist interest and the rail journey would include accommodation on trains, food and local sightseeing facilities.

5.3.1.6. The way forward

The country has an extensive network of railways covering multitude of tourist destinations. It runs train services all over the country which cater to different type of travelers. It also has come out with unique tourism products such as heritage trains and toy trains to specifically attract foreign tourists as elaborated earlier. It needs to develop a wider range of support facilities for the foreign tourists (discussed later). The Ministry of Railways in order to thwart the competition thrown by the budget airlines have started revamping the system. This includes introduction of new rakes, introduction of high speed trains in various routes as well as restructuring the major stations and providing them a new, modern look.

5.4.   Road Infrastructure

The roads constitute a vital link in tourism infrastructure. It forms the connecting link for majority of tourist destinations and circuits within the country. Almost 70% of passenger travel in India is by roads[9]. The national highways are the backbone of road infrastructure in the country, covering a total length of 65,569 km. The no. of national highways passing through the different states is given below:

Table 5.4: State-wise Length of National Highways Passing through States in India

| States/UTs	National Highway No.	Total Length (In Kms.)
Andhra Pradesh	4, 5, 7, 9, 16, 18, 43, 63, 202, 205, 214, 214A, 219, 221 & 222	4472
Arunachal Pradesh	52, 52A & 153	392
Assam	31, 31B, 31C, 36, 37, 37A, 38, 39, 44, 51, 52, 52A, 52B, 53, 54, 61, 62, 151, 152, 153 & 154	2836
Bihar	2, 19, 28, 28A, 28B, 30, 30A, 31, 57, 57A, 77, 80, 81, 82, 83, 84, 85, 98, 99, 101, 102, 103, 104, 105, 106, 107 & 110	3537
Chandigarh	21	24
Chhattisgarh	6, 12A, 16, 43, 78, 111, 200, 202, 216, 217 & 221	2184
Delhi	1, 2, 8, 10 & 24	72
Goa	4A, 17, 17A & 17B	269
Gujarat	6, 8, 8A, 8B, 8C, 8D, 8E, 14, 15, 59, 113 & NE-1	2871
Haryana	1, 2, 8, 10, 21A, 22, 64, 65, 71, 71A, 71B, 72, 73 & 73A	1468
Himachal Pradesh	1A, 20, 21, 21A, 22, 70, 72, 73A & 88	1208
Jammu & Kashmir	1A, 1B & 1C	823
Jharkhand	2, 6, 23, 31, 32, 33, 75, 78, 80, 98, 99, 100	1805
Karnataka	4, 4A, 7, 9, 13, 17, 48, 63, 67, 206, 207, 209, 212 & 218	3843
Kerala	17, 47, 47A, 49, 208, 212, 213 & 220	1440

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[9] Statement sourced from "National Tourism Policy 2002"

Table 5.5: State-wise Length of National Highways Passing through States in India

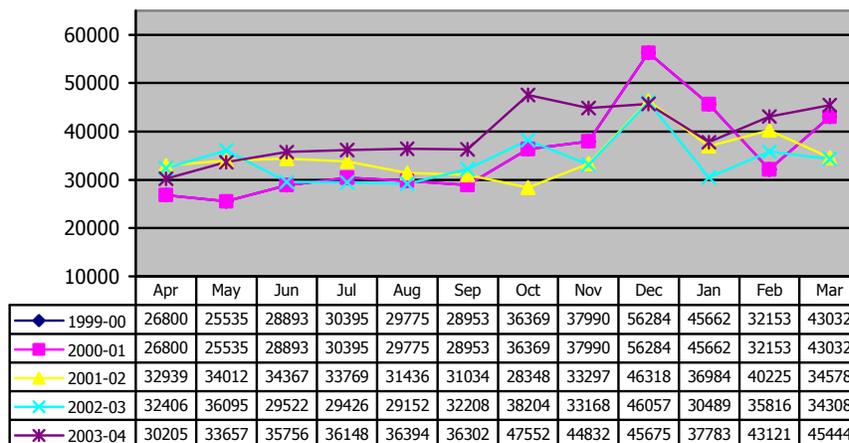| States/UTs	National Highway No.	Total Length (In Kms.)
Madhya Pradesh	3, 7, 12, 12A, 25, 26, 26A, 27, 59, 59A, 69, 75, 76, 78, 79, 86, 86A & 92	5200
Maharashtra	3, 4, 4B, 4C, 6, 7, 8, 9, 13, 16, 17, 50, 69, 204, 211 & 222	4176
Manipur	39, 53, 150 & 155	959
Meghalaya	40, 44, 51, 62	810
Mizoram	44A, 54, 54A, 54B, 150 & 154	927
Nagaland	36, 39, 61, 150 & 155	494
Orissa	5, 5A, 6, 23, 42, 43, 60, 200, 201, 203, 203A, 215, 217 & 224	3704
Pondicherry	45A & 66	53
Punjab	1, 1A, 10, 15, 20, 21, 22, 64, 70, 71, 72 & 95	1557
Rajasthan	3, 8, 11, 11A, 11B, 12, 14, 15, 65, 71B, 76, 79, 79A, 89, 90, 112, 113, 114 & 116	5585
Sikkim	31A	62
Tamil Nadu	4, 5, 7, 7A, 45, 45A, 45B, 45C, 46, 47, 47B, 49, 66, 67, 68, 205, 207, 208, 209, 210, 219 & 220	4183
Tripura	44 & 44A	400
Uttaranchal	58, 72, 72A, 73, 74, 87, 94, 108, 109, 119, 121, 123 & 125	1991
Uttar Pradesh	2, 2A, 3, 7, 11, 12A, 19, 24, 24A, 25, 25A, 26, 27, 28, 28B, 28C, 29, 56, 56A, 56B, 58, 72A, 73, 74, 75, 76, 86, 87, 91, 91A, 92, 93, 96, 97 & 119	5599
West Bengal	2, 6, 31, 31A, 31C, 32, 34, 35, 41, 55, 60, 60A, 80, 81 & 117	2325
Andaman & Nicobar Islands	223	300
Total		**65569**

The figure below indicates a vivid description of the national highways and its expanse in the country.

Figure 5.2: National Highways Map of India
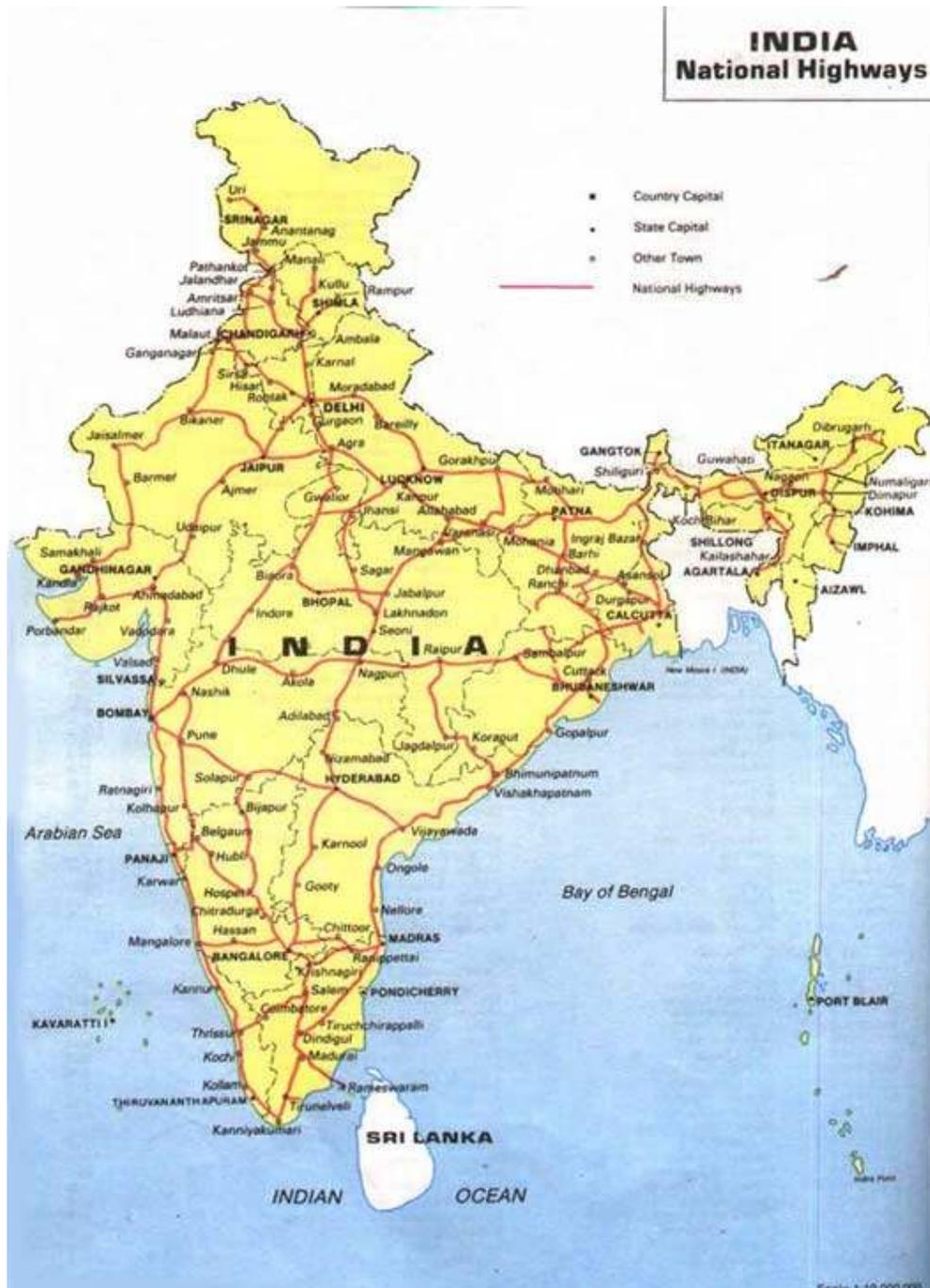
5.4.1.   Foreign Tourist arrival by Land

The foreign tourist arrival by land has been indicated in the following figure, which indicates a month by month break up for the period 1999 – 2003-04.

Figure 5.3: Foreign Tourist Arrival by Land

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1999-00	26800	25535	28893	30395	29775	28953	36369	37990	56284	45662	32153	43032
2000-01	26800	25535	28893	30395	29775	28953	36369	37990	56284	45662	32153	43032
2001-02	32939	34012	34367	33769	31436	31034	28348	33297	46318	36984	40225	34578
2002-03	32406	36095	29522	29426	29152	32208	38204	33168	46057	30489	35816	34308
2003-04	30205	33657	35756	36148	36394	36302	47552	44832	45675	37783	43121	45444

The figure indicates that considerably lesser no. of foreign tourists arrive in India by land compared to the ones arriving by air (refer 5.5.3). These are primarily the tourists visiting the country from the neighbouring countries like Pakistan, Bangladesh as well as Mayanmar. The trends indicate a more or less consistent flow of tourists for April- August period followed by a short period of growth for the September – December period. This is followed by a drop for the Jan – March period. The year on year analysis indicates rampant fluctuations for the October – March period.

5.4.2. Available modes of transport

The different modes of transport available to access the various destinations vary considerably. While some of the destinations are easily accessible by a variety of modes, others are accessible only by a limited number of modes. The available modes include AC and Non AC Cabs, AC, Deluxe and Non AC buses run by the different State Transport Corporations as well as by the private operators. Bookings for the different destinations can be done directly at the different Inter State Bus Terminuses.

The modes of transport available to access the various locations earmarked for the foreign tourists in each tourism product has been detailed out below:

Heritage Tourism – The majority of the locations are accessible by a variety of modes to the nearest centres, which includes buses as well as taxis.
Wildlife Tourism – The choice of modes to access the wildlife attractions is limited. The most convenient and readily available are commercial or private cars and jeeps which can be hired on a contract basis.

Eco-Tourism – The choice of modes to access the eco-tourism attractions is limited. The most convenient and readily available are commercial or private cars and jeeps which can be hired on a contract basis.

Medical Tourism – The majority of the destinations are accessible by a variety of modes. There are public transport services available to these destinations in addition to these commercial vehicles are available for hire.

Adventure Tourism – The choice of modes to the various destinations in Adventure Tourism vary considerably.

Rural Tourism – Most of the destinations are located in remote areas, therefore the choice of modes available are limited. The most convenient mode to access the locations is commercial or private cars and jeeps.

MICE Tourism – The majority of the destinations are accessible by a variety of modes. There are public transport services available to these destinations; in addition to these commercial vehicles are available for hire.

Buddhist Circuit – The choice of modes to the various destinations in the Buddhist circuit vary considerably. The more popular destinations of the circuit like Bodhgaya, Sarnath and Aurangabad can be accessed by a variety of modes (like public bus services, cars, jeeps, etc.). However, the majority of the destinations in the circuit are accessible only by commercial or private cars and jeeps

5.4.3.   The way forward

The Golden Quadrangle Project conceived and currently under implementation is likely to boost up the surface transport in the country to a great extent. Under this ambitious project all the major metro cities would be connected through the national highways and 2 major highways would criss – cross the entire length of the nation as indicated in the figure below. This project would provide impetus to the surface transport modes and would immensely help in boosting tourism in the coming years. The map of the project along with the stages of completion has been shown below.

**Figure 5.4: The Golden Quadrangle**
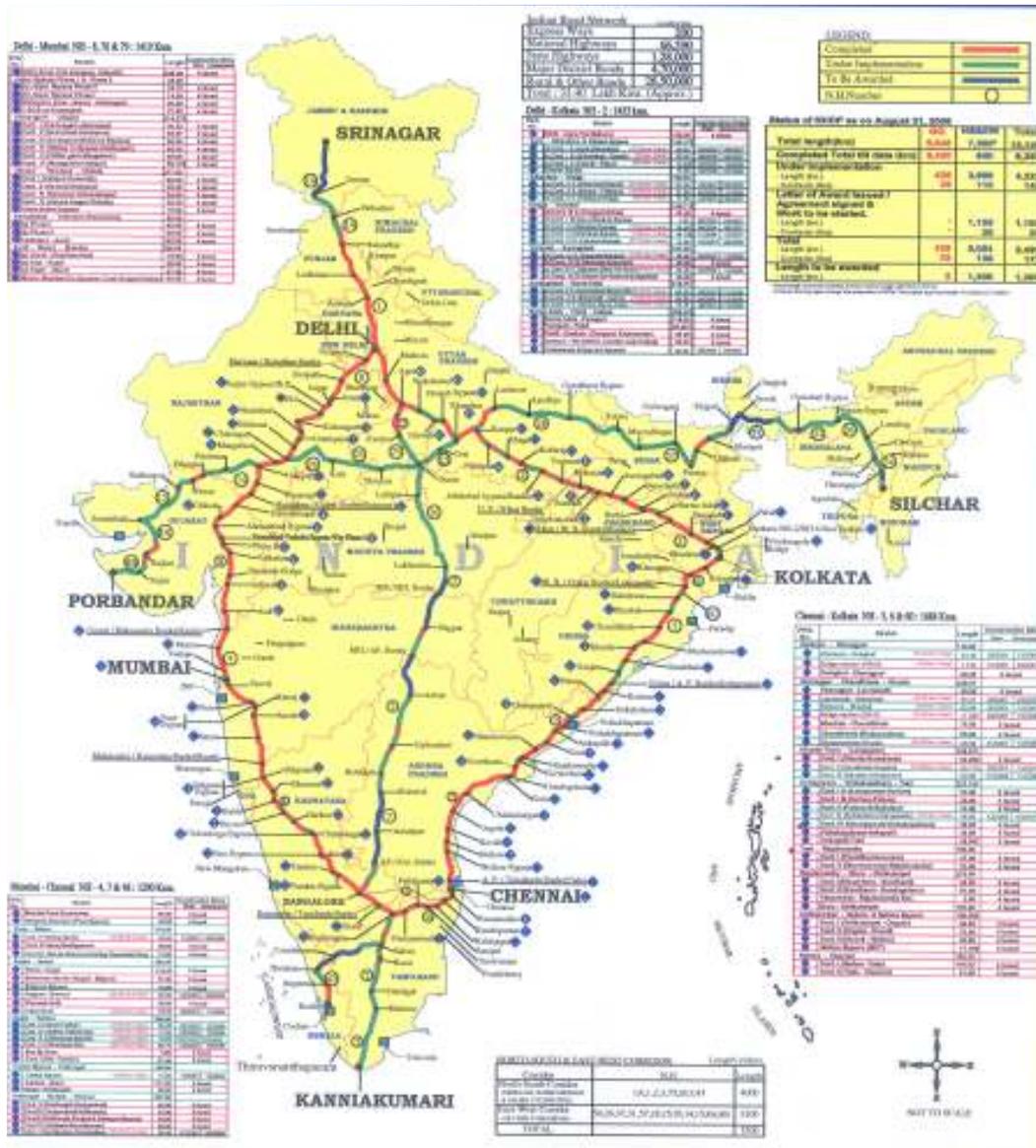
5.4.4.   Perceived bottlenecks

The roadways provide the most extensive connectivity to the different tourist locations in the country. However, there is lack of comprehensive information on the existing support facilities available to the foreign tourists. The "Incredible India" campaign lacks any mention of the tourist travel operators providing road transportation services between major points for the foreign tourists. A comprehensive information about the tariffs on point to point connectivity would help immensely. There is need for an integrated approach towards development of road infrastructure and support facilities by the state and central governments. Moreover, deficiencies in support facilities for each tourism product should be identified and addressed separately.

5.5.   Air Infrastructure – an evaluation

Air is the preferred mode for international travel. It is the predominant mode of travel for tourists coming to India and constitutes 85.6% of the total traffic. The Ministry of Civil Aviation is the nodal Ministry responsible for the formulation of national policies and programmes for development and regulation of Civil Aviation and for devising and implementing schemes for the orderly growth and expansion of civil air transport. Its functions also extend to overseeing airport facilities, air traffic services and carriage of passengers and goods by air. The Airport Authority of India is the official authority that monitors all the airports in India. The available air connectivity between different Airports of India has been indicated in the Figure below

Figure 5.5: Air Connectivity in India
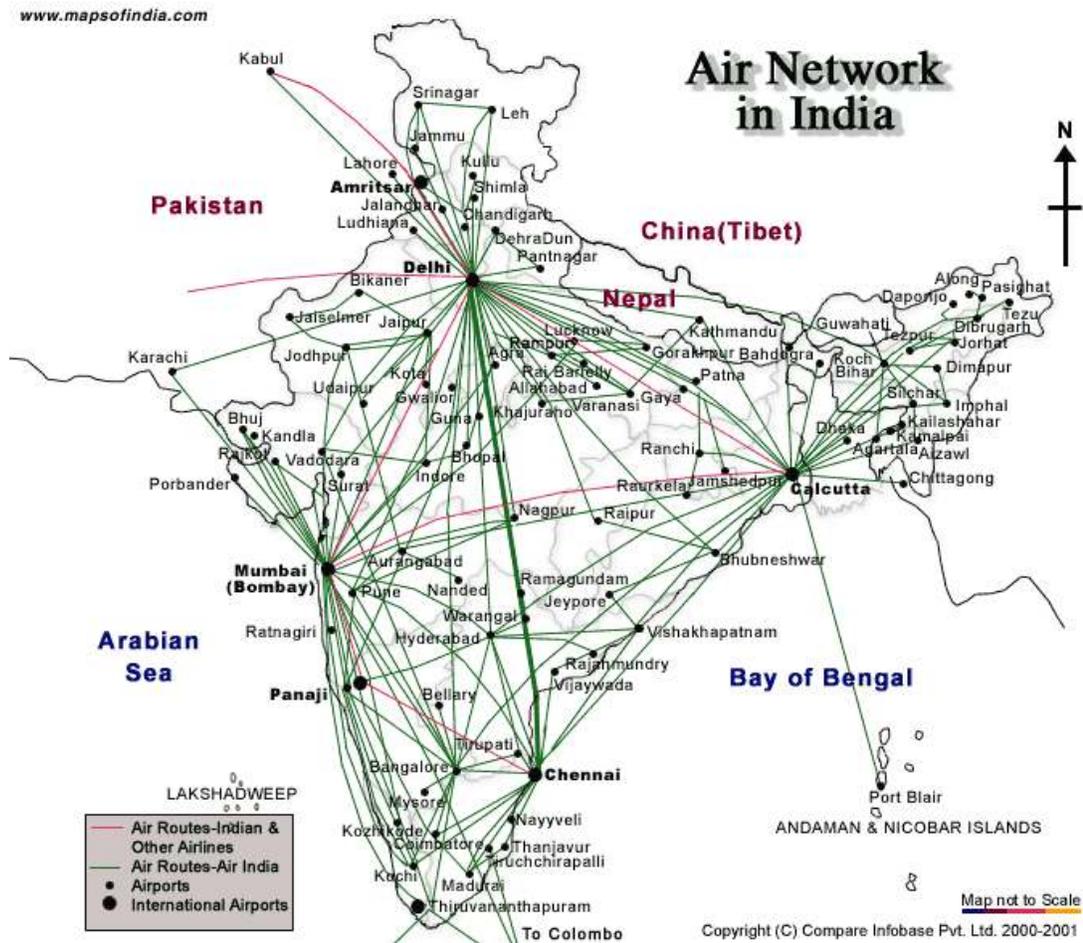
5.5.1.   Available Airport Infrastructure

Presently, there are 16 international airports, 7 custom airports and 23 non-custom domestic airports operating in India. There are also a number of smaller airports having limited domestic operations other than these major airports. The table below lists the international and major domestic airports in India:

Table 5.6: Category of major Airports in India

International Airports	Custom Airports	Non-custom Domestic Airports	
Mumbai	Pune	Vadodara	Leh
Delhi	Lucknow	Indore	Juhu
Chennai	Coimbatore	Mangalore	Aurangabad
Bangalore	Varanasi	Jammu	Imphal
Kolkata	Patna	Agartala	Bhopal
Hyderabad	Gaya	Udaipur	Chandigarh
Goa		Bhubaneshwar	Jodhpur
Ahmedabad		Vishakhapatnam	Dibrugarh
Trivandrum		Portblair	Raipur
Calicut		Bagdogra	Silchar
Guwahati		Madurai	Ranchi
Srinagar		Rajkot	
Amritsar			
Jaipur			
Nagpur			
Cochin (CIAL)			

5.5.2. Landing capacity

An overview of the Type of Aircrafts and their capacity of landing in different airports as well as the proposed capacities have been indicated in the Table below.

Table 5.7: Available Airport Infrastructure

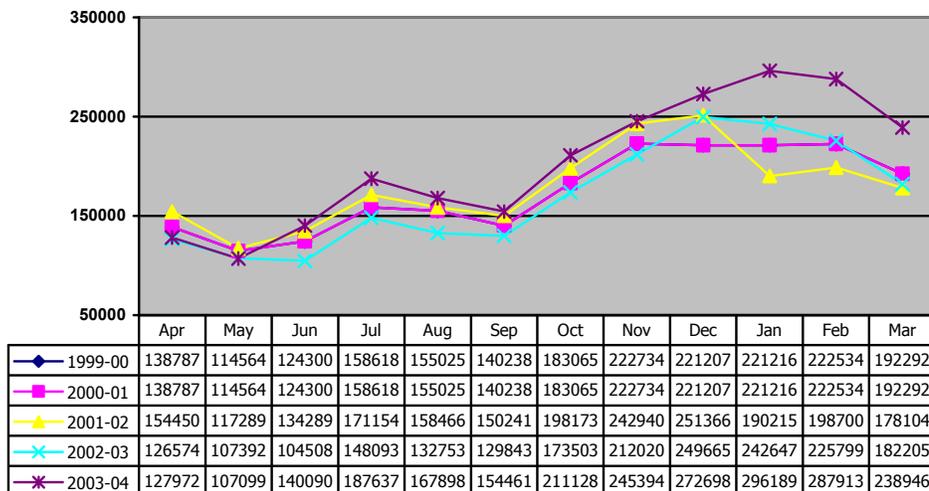| Type of Aircraft	Landing Capacity	
	Capable	Being Planned/ Developed
B-747 (350-450 seater)	Calcutta, Chennai, Delhi, Mumbai, *Bangalore, Thiruvananthapuram, Cochin (CIAL) (7)	Ahmedabad, Amritsar, Guwahati (3)
AB-300 (250-275 seater)	Ahmedabad, *Amritsar, Goa (CE), Guwahati, Hyderabad, *Nagpur, Srinagar, *Lucknow, Calicut (9)	Aurangabad, Varanasi, Bhubaneswar, Calicut, Coimbatore, Jaipur, Lucknow (7)
AB-320 (150-170 seater)	Agra (CE), *Agartala, Aurangabad, Bagdogra (CE), Bhubaneswar, Bhuj (CE), Bhopal, *Bhavnagar, Calicut, Coimbatore, Chandigarh (CE), *Dibrugarh, Indore, Gwalior (CE), Imphal, Jaipur, Jamnagar (CE), Jorhat (CE), Lucknow, *Patna, Pune (CE), Ranchi, *Trichy, Tirupati, Tezpur (CE), Udaipur, Varanasi, Vadodara, Leh (29)	Jammu (CE), Lilabari, Mangalore, Madurai, Port Blair (CE), Trichy, Dimapur, Raipur, Silchar, Khajuraho (10)

Table 5.5 (Contd.): Available Airport Infrastructure

Type of Aircraft	Landing Capacity	
	Capable	**Being Planned/ Developed**
B 737 (100-168 seater)	Allahabad (CE), Bikaner (CE), Cochin (CE), Gorakhpur (CE), Jaisalmer (CE), Jamnagar (CE), Jammu (CE), Kanpur (Chakeri - CE), Khajuraho, Madurai, Raipur, *Mangalore, Port Blair (CE), *Rajkot, Salem, Silchar (CE), Vizag (CE), Dimapur , Jabalpur, Lengpui - New Airport (20)	Vijayawada (1)
F-27/ATR 42-72 (45-68 seater)	Barapani, Belgum, Gaya, Hubli, Jharsuguda, Kamalpur, Kolhapur, Kandla, Lalitpur, Keshod, Lilabari, Ludhiana, Porbander, Rajamundry, Sholapur, Tuticorin, Tezu, Vijayawada, Warangal (19)	Gaggal (1)
Dornier-228 (18 seater)	Aizawl, Akola, Along (CE), Balurghat, Bilaspur, Cooch-Behar, Cuddapa, Daparizo (CE), Dehradun, Deesa, Gaggal, Jhansi, Kota, Kailashhar, Kanpur, Kullu, Malda, Muzzaffarpur, Mysore, Passighat, Pantnagar, Pondichery, Satna, Shimla, Zero (25)	Kargil, Tura (New Airport) (2)
Pushpak Type	Behala, Juhu, Safdarjung, Nadirgul, Donakonda, Vellore (6)	-

5.5.3.   Foreign Tourist arrival by Air

Tourist arrival in India by Air across the different years and months have been indicated in the figure below.

Figure 5.6: Foreign tourist arrival trend by Air

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1999-00	138787	114564	124300	158618	155025	140238	183065	222734	221207	221216	222534	192292
2000-01	138787	114564	124300	158618	155025	140238	183065	222734	221207	221216	222534	192292
2001-02	154450	117289	134289	171154	158466	150241	198173	242940	251366	190215	198700	178104
2002-03	126574	107392	104508	148093	132753	129843	173503	212020	249665	242647	225799	182205
2003-04	127972	107099	140090	187637	167898	154461	211128	245394	272698	296189	287913	238946

A typical trend can be observed with regard to the month wise arrival trends by air to India. The period under consideration is 1999 – 00 to 2003-04. The tourist arrival witnessed a downward trend for the April – June period followed by a period of recovery for the next month viz. July, dropped again till September before picking up for the rest of the winter.

A fascinating growth in tourist arrival through air has been observed for the period 2003-04 for almost all the months compared to the rest of the years under consideration. The abrupt drop during the Jan March Period 2001-02 is on aftermath of 9/11 attacks. This is indeed a positive sign for the emerging tourism opportunities that India has to offer.

5.5.4.   International Traffic flow in major airports of India

There is considerable variation in the share of international traffic handled by the international airports. The majority of international air traffic is handled by Mumbai and Delhi Airports followed by Chennai and Cochin. The chart shows the variation in the international traffic handled by the international airports for last 2 years.

Figure 5.7: Flow of International Traffic in major airports

■ **2004-2005** ■ **2003-2004**
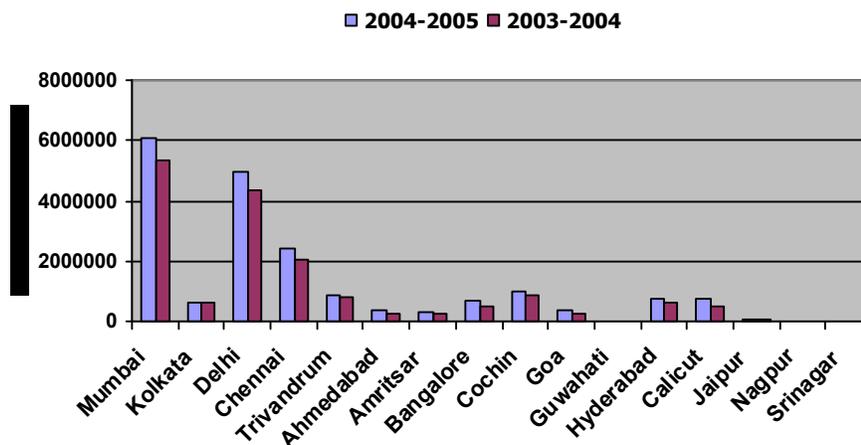
As evident from the chart above, there is wide variation in the traffic handled by the different airports. Out of the total traffic handled, the maximum share of international passengers are being handled by Mumbai airport (around 31%) followed by Delhi (26%), Chennai (12%) and Kolkata (3%). The rest of the traffic (around 28%) is being handled by other airports. Also, annual increase in the total traffic handled by the airports in the year 2004-05 from previous year is around 14%.which is a positive trend in terms international travelers coming to India.

5.5.5.   Bilateral Air Service Agreements

A.   An overview of governing factors

International Air transport services between two countries are determined by bilateral "Air Service Agreements" (ASA). These agreements (Bilateral) specify the airlines of each country that can provide air services, the frequency of these services, and the points (cities) that can be served in each country. In addition, many bilateral air agreements contain provisions limiting the capacity that a carrier or carriers may operate by imposing a cap on the size of aircraft that may be employed or the weekly number of seats that may be offered.

The Freedoms of the air are a set of commercial aviation rights granting a country's the privilege to enter and land in another country's airspace. These rights are the backbone for negotiating capacity rights between countries under each Air Service Agreement. The different types of air freedoms in existence are:

Degrees of Freedom governing Bi lateral Air Service Agreements

- First Freedom of the Air - the right or privilege, in respect of scheduled international air services, granted by one State to another State or States to fly across its territory without landing (also known as a First Freedom Right).

- Second Freedom of the Air - the right or privilege, in respect of scheduled international air services, granted by one State to another State or States to land in its territory for non-traffic purposes (also known as a Second Freedom Right).

- Third Freedom of The Air - the right or privilege, in respect of scheduled international air services, granted by one State to another State to put down, in the territory of the first State, traffic coming from the home State of the carrier (also known as a Third Freedom Right).

- Fourth Freedom of The Air - the right or privilege, in respect of scheduled international air services, granted by one State to another State to take on, in the territory of the first State, traffic destined for the home State of the carrier (also known as a Fourth Freedom Right).

- Fifth Freedom of The Air - the right or privilege, in respect of scheduled international air services, granted by one State to another State to put down and to take on, in the territory of the first State, traffic coming from or destined to a third State (also known as a Fifth Freedom Right).

- Sixth Freedom of The Air - the right or privilege, in respect of scheduled international air services, of transporting, via the home State of the carrier, traffic moving between two other States (also known as a Sixth Freedom Right). The so-called Sixth Freedom of the Air, unlike the first five freedoms, is not incorporated as such into any widely recognized air service agreements such as the "Five Freedoms Agreement".

- Seventh Freedom of The Air - the right or privilege, in respect of scheduled international air services, granted by one State to another State, of transporting traffic between the territory of the granting State and any third State with no requirement to include on such operation any point in the territory of the recipient State, i.e the service need not connect to or be an extension of any service to/from the home State of the carrier.

- Eighth Freedom of The Air - the right or privilege, in respect of scheduled international air services, of transporting cabotage traffic between two points in the territory of the granting State on a service which originates or terminates in the home country of the foreign carrier or (in connection with the so-called Seventh Freedom of the Air) outside the territory of the granting State (also known as a Eighth Freedom Right or "consecutive cabotage").

- Ninth Freedom of The Air - the right or privilege of transporting cabotage traffic of the granting State on a service performed entirely within the territory of the granting State (also known as a Ninth Freedom Right or "stand alone" cabotage).

ICAO characterizes all "freedoms" beyond the Fifth as "so-called" because only the first five "freedoms" have been officially recognized as such by international treaty.

B.   **Air Transport Policy in India – Key characteristics**

The key characteristics of India's air transport policy are:

- *Traffic Rights are controlled by the Government* - India follows a dual designation policy, which designates Air India as the primary Indian carrier and thus the airline enjoys the first right of refusal for international operations to / from India and private carriers are not designated for air traffic rights.
- *Restrictions on Frequency of flights and Air seat capacity* – Air seat capacity is the negotiating point in most of ASAs in India and the civil aviation ministry has a restrictive approach towards frequency of flights and air seat capacity.
- *Restriction on routes to be served* – The civil aviation ministry follows a restrictive policy on the routes to be served
- *Restriction on 5th freedom of air* - Allowing 5th Freedom to a foreign carrier out of India would compete with our national carrier and the carrier of the third country therefore there are certain restrictions on 5th freedom rights .
- *Code sharing Provisions*- Refers to the ability of an airline to sell seats on a flight operated by another airline. Provisions for code sharing are included in many of India's ASA's.
- *Double Approval of Tariffs* - A tariff is commonly defined as the price to be charged for the carriage of passengers or cargo (excluding mail) and the general terms and condition of carriage. India follows the regime of "double approval" of tariffs, which entails that prices filed by the airlines may only come into effect if both countries' regulatory authorities approve or single disapproval
- *Royalty Payments* - Where a foreign carrier seeks to obtain or enhance capacity to India but this is not matched with the national carriers desire (or ability) to fly to that country then 'Royalties' are charged, ostensibly in lieu of the profits that the national carrier may have made.
- *Ownership and Effective control* - Most of India's ASA's specify "Substantial Ownership and Effective Control" as a precondition to commencement of services wherein designated carriers are generally required to be 'substantially owned and effectively controlled' by the government or nationals of the bilateral partner country so as to be able to utilize rights negotiated under the ASA's.

C.   **Status of Bi lateral Agreements and type of Agreement**

At present, India has air service agreements with 98 countries out of which 47 are dormant, 28 are being utilized by Air India and Indian Airlines and 51 are being utilized by foreign countries. The Table below gives the details of bilateral air agreements of India with other countries:

Table 5.8 : Status of Bilateral Air Agreements of India with Other Countries (Till 2005)

Country	Type of Agreement	Airlines Operating	
		Foreign	**Indian**
Canada	Multiple	Air Canada	Air India
U.S.A.	Multiple	Delta Airlines	Air India
		North West Airlines	
Brazil	Dual	None	None
Algeria	Multiple	None	None
Djibouti	Dual	None	None
Ethiopia	Dual	Ethiopian Airlines	Air India
Ghana	Single	None	None
Kenya	Single	Kenya Airways	Air India
Lesotho	Single	None	None
Madagascar	Single	None	None
Mauritius	Single	Air Mauritius	None
Morocco	Dual	None	None
Nigeria	Single	None	None
Seychelles	Single	Air Seychelles	None
South Africa	Multiple	South African Airways	Air India
Tanzania	Single	None	Air India
Uganda	Multiple	None	None
Republic of Yemen	Dual	Yemen Airlines	None
Zambia	Single	None	None
Australia	Dual	Qantas Airways	None
Brunei	Dual	None	None
Cambodia	Dual	None	None
China	Multiple	China Eastern Airlines	Air India
Fiji	Single	None	None
Hong Kong	Multiple	Cathay Pacific Airways	Air India
Indonesia	Dual	None	None
Japan	Multiple	Japan Airlines	Air India
Republic of Korea	Multiple	Korean Airlines	None
		Asiana Airlines	
Macau	Dual	None	None
Malaysia	Multiple	Malaysia Airlines	Air India
			Indian Airlines
Mongolia	Dual	None	None
New Zealand	Dual	None	None
Philippines	Multiple	None	None
Singapore	Multiple	Singapore Airlines	Air India
		Silk Air	Indian Airlines
Taiwan	No ASA	China Airlines	None
Thailand	Multiple	Thai Airways	Air India
		Phukhet Air	Indian Airlines
Tunisia	Multiple	None	None
Vietnam	Multiple	None	None
Austria	Dual	Austrian Airlines	None
Belgium	Multiple	None	None

Table 5.8 (Contd.): Status of Bilateral Air Agreements of India with Other Countries (Till 2005)

Country	Type of Agreement	Airlines Operating	
		Foreign	Indian
Bulgaria	Single	None	None
Croatia	Dual	None	None
Czech Republic	Dual	None	None
Denmark	Single	None	None
Finland	Single	None	None
France	Multiple	Air France	Air India
Germany	Multiple	Lufthansa	Air India
Greece	ASA to be agreed	None	None
Hungary	Single	None	None
Ireland	Single	None	None
Italy	Multiple	Alitalia	None
Luxembourg	Dual	None	None
Malta	Single	None	None
Netherlands	Multiple	KLM	Air India
Norway	Single	None	None
Poland	Single	LOT	None
Portugal	Single	None	None
Romania	Single	None	None
Slovak Republic	Dual	Air Slovakia	None
Slovenia	Dual	None	None
Spain	Single	None	None
Sweden	Single	None	None
Switzerland	Dual	Swiss International Airlines	None
United Kingdom	Multiple	British Airways	Air India
		Virgin Atlantic	
Yogoslavia	Dual	None	None
Armenia	Dual	None	None
Azerbaijan	Dual	None	None
Belarus	Dual	None	None
Georgia	Dual	None	None
Kazakhstan	Dual	Air Astana	None
Kyrghyztan	Multiple	Kyrghyztan Airlines	None
Latvia	Dual	None	None
Lithuania	Dual	None	None
Russia	Multiple	Aeroflot	None
Tajikistan	Dual	Tajikistan Airlines	None
Turkmenistan	Multiple	Turkmenistan Airlines	None
Ukraine	Dual	Aerosvit	None
Uzbekistan	Multiple	Uzbekistan Airways	None
Afganistan	Dual	Ariana Afghan Airlines	None
Bahrain,UAE (excluding Dubai), Oman	Multiple	Gulf Air	Air India
			Indian Airlines
Cyprus	Single	None	None
Egypt	Single	Egypt Air	None

Table 5.8 (Contd.): Status of Bilateral Air Agreements of India with Other Countries (Till 2005)

Country	Type of Agreement	Airlines Operating	
		Foreign	**Indian**
Iran	Dual	Iran Air	None
		Mahan Air	
Iraq	Agreement not specified	None	None
Israel	Single	EL-AL Israel Airlines	None
Jordan	Multiple	Royal Jordanian Airlines	None
Kuwait	Dual	Kuwait Airways	Air India
			Indian Airlines
Lebanon	Multiple	None	None
Oman	Multiple	Oman Air	Air India
			Indian Airlines
			Air India Express
Qatar	Multiple	Qatar Airways	Air India
			Indian Airlines
			Air India Express
Saudi Arabia	Single	Saudi Arabian Airlines	Air India
Syria	Single	Syrian Arab Airlines	None
Turkey	Single	Turkish Airlines	None
Dubai	Multiple	Emirates	Air India
		Eithad Airways	Indian Airlines
Bangladesh	Multiple	Biman Bangladesh Airlines	Indian Airlines
		GMG Airlines	
Bhutan	Multiple	Druk Air	None
Maldives	Multiple	None	Indian Airlines
Myanmar	Dual	Myanmar Airways International	Indian Airlines
Nepal	Multiple	Royal Nepal Airlines	Indian Airlines
		Cosmic Air	
Pakistan	Single	Pakistan International Airlines	Indian Airlines
Sri Lanka	Multiple	Sri Lankan Airlines	Indian Airlines

Source: Ministry of Civil Aviation

As per DGCA Officials, there are certain problems with regard to available infrastructure in certain Indian airports, which prevents certain aircrafts to land in those airports. As far as the frequency of flights are concerned, some flights originating from different destinations across the world, are not able to operate the same owing to lower occupancy levels, though they have operating rights and fixed seat capacities as per bilateral agreement.

Economic growth, liberalization and airlines' operational efficiencies are the three fundamentals drivers behind the increase in air travel. Eventually, only players having control over the cost factor would succeed in the longer run.

Mumbai is finally cruising towards being home to a second airport – a Greenfield one – at Navi Mumbai. The International Civil Aviation Organization (ICAO) has given its green signal for going ahead with constructing the Greenfield airport, paving the way for the government to finalise bid documents and invite tenders from private consortia.

The reliability and exceptional low-operating cost of the Next-Generation 737 will be fitted with Blended Winglets, which improve fuel efficiency, reduce carbon emission, increase range and reduce takeoff noise as well. "According to Boeing, the 737-800, which can seat between 162 to 189 passengers, is 1,500 pounds lighter, can fly 260 nautical miles farther and 1,100 feet higher while carrying 12 more passengers than the competing models. The Next-Generation 737 has logged 422 gross orders in 2006.

Qantas and Jet Airways have announced a codeshare arrangement, Qantas network within India from September 6. Qantas now offer a greater than daily frequency between Sydney and Mumbai, when combined with the existing Qantas thrice-weekly Airbus A330-300 services. In addition, Perth gains a daily codeshare connection to Mumbai. Also offer Delhi, a new point on the Qantas network, with daily connections to Sydney, Melbourne, Brisbane and Perth, via Singapore, Cairns, Darwin and Adelaide will also benefit with excellent connections. On the Delhi-Singapore and Mumbai-Singapore routes

Jazeera Airways recently began flights to Cochin, its third destination in India. Cochin is an important addition to our tourist destinations. The city is rated in the top three tourist destinations by the World Travel & Tourism Council and featured in National Geographic Traveler's 50 greatest places of a lifetime.

Emirates since launching its flights to Hyderabad, has achieved several milestones: It has been recognized for its role in promoting the growth of tourism in Andhra Pradesh by being awarded the Tourism in Andhra Pradesh by being awarded the Tourism Awards for Excellence.

The airline was also honoured by the European Telugu Association for its contribution in promoting cultural links between the Telugu-speaking people of the UK and Andhra Pradesh. Emirates also flew in delegation of medical professionals from the Gulf to survey and promote the advanced medical technology adopted by hospitals in Hyderabad.

India is a strategic market for Lufthansa. The growth has been much faster in India, and it's the second largest market in Asia after Japan. Plus, what's amazing about India is the constantly changing scenario. Lufthansa currently operates 42 weekly flights, and will soon add three more from India. Two years ago, the eticketing share was just 7 per cent; today, it has reached 72 per cent. Travel agents need to update their way of working if they were to survive. Their role had to go beyond that of a mere ticket issuer to a one-stop travel shop where all the requirements of a traveler would be more.

As many as five new international airlines from across the globe have sought the government nod to cruise into the Indian skies the coming winter, promising to add more zing to the already inmtense competition and bring down air fares to a lower altitude.

The new entrants this winter include Air China, Finn air, NOK Air, Condor and Euro Fly. Most of these airlines have secured government nod to operate direct international flights between India and their country of origin. These new flights would be added in the winter schedule of 2006-peak season for international travel-leading to more in-sense passenger loads. While Air China plans to start operations into India with a thrice-weekly direct flight between Delhi and Beijing, the airline also intends to later include Guangzhou in its flight path.

Finland's flag carrier Finn air is another new carrier set to debut on the India route this October, with a thrice-weekly connection to Delhi. Finn air also plans to sell Helsinki-Vantaa as a convenient alternate hub for traveling to other European destinations. The airline also plans to add Chennai and Mumbai to its points of call in India starting summer of 2007. the airline has been operating leisure flights to Goa in summers for years now.

The other leisure flight operator that is planning to move to scheduled operations on the India route is Condor Airlines. Sources said it plans to operate twice weekly scheduled flights to Goa this winter in an attempt to cash-in on the vacation travel rush. .

Another European airline, Euro Fly from Italy, is understood to be preparing to touch down on the Indian airports this winter. The airlines today operate full-service flights within Europe and to US and Canada. The only low-cost carrier in this lot of new entrants will be NOK Air of Thailand. The airline is said to be in dialogue with Directorate General of Civil Aviation to start flight operations to India.

Table 5.8a: Major markets and their current connectivity

Country	Locations Overseas	Carriers	Delhi	Mumbai	Kolkata	Chennai	Bangalore	Hyderabad
UK	LONDON + BIRMINGHAM	British Airways, Virgin Atlantic, Air India, Jet, Sahara		√	√			
USA	NEW YORK + LOS ANGELES + NEWARK	American Airlines, Delta, North West, Air India, Jet		√		√	√	
CANADA	TORONTO	Air Canada, Air India		√				
FRANCE	PARIS	Air France, Air India, KLM				√	√	√
GERMANY	BERLIN + FRANKFURT + HAMBURG MUNICH	Lufthansa, Air India, Etihad	√	√		√	√	√
JAPAN	TOKYO	Japan Airlines						

Table 5.8a (Contd.) : Major markets and their current connectivity

Country	Locations Overseas	Carriers	Delhi	Mumbai	Kolkata	Chennai	Bangalore	Hyderabad
MALAYSIA	KUALALAMPUR	Malaysian Airlines, Air India		√		√	√	√
AUSTRALIA	MELBOURNE + SYDNEY + PERTH + BRISBANE	Air India, Qantas		√			√	√
SINGAPORE	SINGAPORE	Singapore Airlines, Air India, Indian Airlines		√	√	√	√	
NETHERLAND	AMSTERDAM + ROTTERDAM	KLM,		√		√	√	√
KOREA	SEOUL	Korean Airlines, Asiana Airlines		√				
CHINA	BEIJING + TAIWAN + SHANGHAI	China Airlines		√	√			
THAILAND	BANGKOK	Thai, Air India, Indian Airlines		√	√	√	√	

5.5.6.   **The Way forward**

The Ministry of Civil Aviation, Government of India has for last 7 seasons allowed additional capacities under the "selective open sky policy" to manage tourist rush. The details of the same for last 7 seasons have been mentioned below:-

Table 5.9: Augmented Seat capacity as per limited "Open Sky Policy"

Month, Year	No. of Seats
March , 2000	4107
Dec, 2000 – March 2001	48086
Dec. 2001 – April 2002	36777
Dec. 2002 – June 2003	52420
Nov 2003 – March 2004	274634
Nov 2004 – March 2005	591829
Nov 2005 – March 2006	230216

Source: DGCA

Government of India can continue with this selective withdrawal of restriction till a consistent flow of foreign tourist is achieved, whereupon it can think of "Opening up it's skies".

The civil Aviation Ministry has submitted a proposal for an Airport Economic Regulatory Authority (AERA) to the Cabinet. The AERA will deal with issues of pricing and competition at airports, particularly in view of the entry of private companies in the airport arena. The regulator- which will be independent of the existing Directorate General of Civil Aviation (DGCA) that deals with the technical aspects of aviation – will also be entrusted with the task of determining pricing of user charges, operations of airlines as well as airports, both state – owned and private.

It's not just Delhi and Mumbai airports that are being given a facelift. The Airport authority of India (AAI) is putting surplus land in 35 non-metro airports under its control to good use by developing them at an estimated cost of Rs 8,000-cr. The AAI will construct hotels, shopping areas, eateries, convention centers, cargo complexes, parking lots and health centers as part of infrastructure development on the city side.

Basic designs of airports in Srinagar, Varanasi, Dibrugarh, Ranchi, Surat, Udaipur, Khajuraho, Amritsar, Visakhapatnam, Thiruvananthapuram, Jaipur, Calicut, Trichi and Ahmedabad have been approved, the designs of the rest, including Bhubaneswar, Patna Bhopal, Deharadun, Pune and Chandigarh are being finalized. The designs would be modular and include structured steel, toughened glass glazing, vertical air-conditioning systems, aerobridges with glass walls and walkways.

Air connectivity is as essential a service today as rail and road connectivity. Modern regional airports will boos tourism, stimulate the aviation industry and generate business opportunities in and around airports." All non- metro airports should be equipped with night-landing facilities as some are tourist hotspots. Development of non-metro airports will reduce congestion and ease traffic in metros.

Many non-metro airports don't have the capacity as their runway length is inadequate." As per AAI up gradation of non-metro airports will include facilities for landing of bigger aircraft. "At Bhubaneswar,

for example, AAI has drawn up plans to extend the runway from 9,000 feet to 10,500 feet which will facilitate operation of Boeing 747 aircraft. Similar developments have taken place at Sanganer Airport in Jaipur as well as Amritsar airport.

State run Airports Authority of India (AAI) along with private players, will develop the 35 non-metro airports under the public private partnership (PPP) model. Under the PPP model, AAI will handle all aeronautical activities at these airports while the development of non-aeronautical activities on the city side of these airports will be executed jointly by AAI and private players. The PPP model is likely to peg the foreign direct investment (FDI) levels at 49 per cent with the private sector partner being allowed to pick up 74 per cent equity in the project.

The non- aeronautical activities that are likely to be allowed at these airports include the development of hotels, restaurants, parking lots, cargo-handling facilities and other tourism-related activities.

AAI will be funding must of the cost of modernizing the airports from internal resources and borrowings. It hopes to rake in earnings from metro airport operations that will be used to fund the modernization of the airports.

As per Civil Aviation Department, construction work on 35 non-metro airports, including two Greenfield airports at Sikkim and Arunachal Pradesh, was likely to begin next year and be completed by 2008-09.

According to Airports Authority of India, the modernization of the 35 non-metro airports is scheduled in three phases. Phase-I includes the modernization of Ahmedabad, Amritsar, Guwahati, Jaipur, Udaipur, Trivandrum, Lucknow, Goa, Madurai and Mangalore airports. Additionally, 15 airports have been identified under Phase-II: Agati, Aurangabad, Khajuraho, Rajkot, Vadodara, Bhopal, Indore, Nagpur, Visakhapatnam, Trichy, Bhubaneswar, Coimbatore, Patna, Port Blair and Varanasi. Thereafter, 10 more airports have been identified for development in Phase III: Agartala, Dehradun, Imphal, Ranchi, Raipur, Agra, Chandigarh, Dimapur, Jammu and Pune.
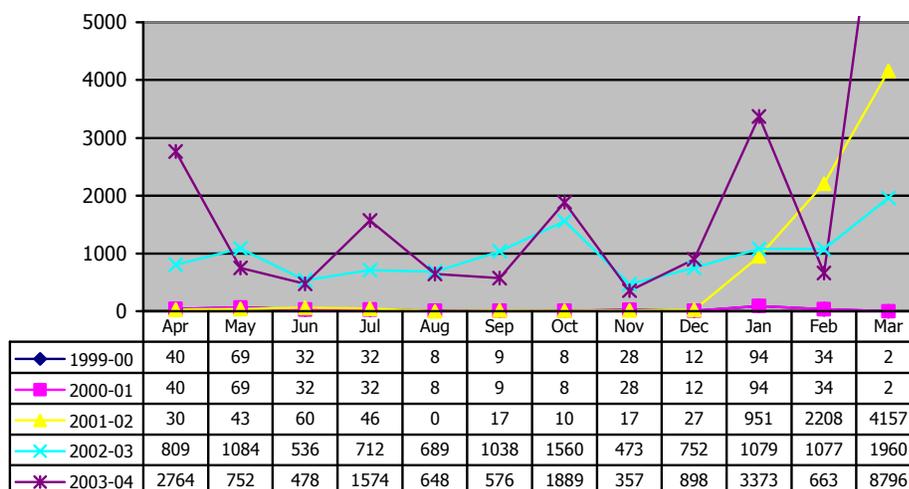
5.6.   Sea and Water Ways Infrastructure

There are 11 major ports and about 180 intermediate and minor ports in India. The sea ports in India are mainly handling the cargo and trade related operations. The major ports in India are Kolkata, Chennai, Cochin, JNP, Kandla, New Mangalore, Moermugao, Mumbai, Paradip, Tuticorin and Vishakhapatnam. There are also extensive network of inland waterways in the country which include rivers, canals, backwaters and creeks. The total navigable length of inland waterways is 14,500 km. The Inland Waterways Authority of India (IWAI) is the statutory authority in charge of the waterways in India. There are three national waterways in India: Allahabad Haldia stretch of the Ganga Bhagirathi Hooghly river, Sadiya Dhubri stretch of the Brahmaputra river system and Kollam Kottapuram stretch of West Coast Canal along with Champakara canal and Udyogmandal canal.

5.6.1.   Foreign tourist arrivals by sea

The share of foreign tourists arriving by sea is negligible with only 0.5% of total tourists availing this mode for entry into the country[10]. Majority of the foreign tourists prefer air as the mode of entry into the country followed by land.

Figure 5.8: Foreign Tourist arrival by Sea

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
1999-00	40	69	32	32	8	9	8	28	12	94	34	2
2000-01	40	69	32	32	8	9	8	28	12	94	34	2
2001-02	30	43	60	46	0	17	10	17	27	951	2208	4157
2002-03	809	1084	536	712	689	1038	1560	473	752	1079	1077	1960
2003-04	2764	752	478	1574	648	576	1889	357	898	3373	663	8796

The figure above indicates the foreign tourist arrival by sea. As elaborated earlier, the volume of foreign tourists arriving by sea remains considerably lower than those arriving by air as well as land. The trend of arrival by this mode is also erratic and no distinctive seasonality can be observed for the same.

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[10] Data as per "India Tourism Statistics Report,2004"

5.6.2. Cruise Tourism – Potential and current status

The Ministry of Tourism identified cruise tourism as having an immense potential for India. It carried out a study to assess the potential of cruise tourism in India and formulate a plan to develop cruise tourism circuits for the international market.

Currently, Goa is the only state which has included some form of cruise tourism in its promotional strategy. The state tourism department offers inland and sea cruises of short duration to tourists. Kerala has also tried to emulate the same including the "Backwater Cruise" in its bouquet of offerings. Some international cruise liners have included India as part of their tours. Superstar Libra, an international cruise liner docks at three destinations in the country at present – Mumbai. Kadmat Island in Lakhshwadeep and Goa

5.7. An Overview of Connectivity – at a glance

An overview of the tourism destinations in India from the point of view of rail, road and air connectivity has been depicted in the ensuing pages.

a. Heritage Tourism

Location	Connectivity		
	Rail	**Road**	**Air**
Agra Fort	• Agra is connected to Delhi by railway lines. Many trains connect Delhi and Agra, including luxury trains such as the Palace on Wheels. Agra Station is known as Agra Cantonment Station.	• Road connectivity to Agra from major cities via national highways. Agra Fort can accessed through city roads	• No direct air connectivity, nearest airport is at Delhi
Ajanta Caves	• Jalgaon is the nearest railhead to Ajanta caves (59 Km)	• Motorable roads connect the caves of Ajanta with Mumbai, Pune, Ahmednagar, Jalgaon, Shirdi, Nasik, Dhule, Ahmedabad, Hyderabad, Indore, Bijapur, and Aurangabad	• Aurangabad is the nearest airpoint for Ajanta (106 Kms)
Buddhist Monuments at Sanchi	• Sanchi lies on the Jhansi-Itarsi section of the Central railways. However, the most nearest railhead is Vidisha.(10 Km)	• Motorable roads connect Sanchi with Bhopal, Indore Sagar, Gwalior, Vidisha and Raisen, besides other places	• Nearest airport is at Bhopal (46 km via Diwanganj and 78 km via Raisen) which is connected with Delhi, Mumbai, Gwalior and Indore.
Champaner-Pavagadh Archaeological Park	• Nearest railhead at Vadodara	• Accessible by road through Vadodara	• Nearest airport is at Vadodara
Chhatrapati Shivaji Terminus	• It serves as the headquarters of central railways and is connected to all major cities via extensive railnetwork	• Motorable roads connect the CST to major cities and also within the city of Mumbai	• International airport at Mumbai
Churches and Convents of Goa	• Margao (33 Km) and Vasco Da Gama (30 Km are the most convenient railheads in the state for visiting the churches and convents	• Panaji is connected by road to Bangalore (598 Km) and Mumbai (594 Km)	• Dabolim Airport is 27 Km from Panaji city centre

Location	Connectivity		
	Rail	**Road**	**Air**
Elephanta Caves	• Located on a small island of Mumbai in Maharashtra, Elephanta can be reached by regular ferries that leave from Mumbai's Gateway of India harbor throughout the year. Mumbai is connected to all the major cities in India thorugh lon-distance trains	• Located on a small island of Mumbai in Maharashtra, Elephanta can be reached by regular ferries that leave from Mumbai's Gateway of India harbour throughout the year. Mumbai is connected to all the major cities in India via extensive road network of National Highways	• Located on a small island of Mumbai in Maharashtra, Elephanta can be reached by regular ferries that leave from Mumbai's Gateway of India harbor throughout the year. International airport at Mumbai
Ellora Caves	• Aurangabad, the closest railhead, is directly connected to Mumbai, Delhi, Agra, and Bhopal	• Aurangabad is connected to all major cities and towns by good roads	• Aurangabad (30 Km) is the nearest airfield and is directly linked to Mumbai, Delhi, Jaipur and Udaipur

Location	Connectivity		
	Rail	**Road**	**Air**
Fatehpur Sikri	• Agra is connected to Delhi by railway lines. Many trains connect Delhi and Agra, including luxury trains such as the Palace on Wheels. Agra Station is known as Agra Cantonment Station.	• . Fatehpur Sikri can accessed through motorable roads via Agra. Good Road connectivity to Agra from major cities via national higways	• Nearest airport is at Delhi
Great Living Chola Temples	• Thanjavur Railway Station is 8 Km away from the Brihadisvara Temple. Thiruchirapalli is the nearest junction.	• Road connecitivity via thricurapalli and thanjavur	• Thiruchirapalli (54 km) for domestic flights and Chennai Airport (334 km) for international flights are the nearest airports.
Group of Monuments at Hampi	• Hospet is the nearest railhead (13 Km). Hospet is linked to Bangalore,Bijapur,Hubli and Guntakal	• Accessible by road through Bangalore (350 Km) and Hospet (13 Km)	• Nearest Airport is at Bangalore (350 Km)
Group of Monuments at Mahabalipuram	• The nearest railway stations are Chengalpattu (29-Km) and Chennai (58-Km).	• Accessible via road from Chennai, Pondicherry and Bangalore.	• Chennai (58-Km) is the nearest airport with both domestic and international terminus. Chennai is connected with all the major places in India through the numerous domestic flights. International flights operate from various parts of the world to Chennai
Group of Monuments at Pattadakal	• The nearest railhead is Badami, 29 Km away.	• Pattadakal is connected by road to Badami (29 Km) and Aihole (17 Km).	• No Air connectivity
Humayun's Tomb, Delhi	• Delhi is connected to all the major cities and towns by rail network	• Motorable roads connect Delhi to all major cities	• International airport at Delhi

Location	Connectivity		
	Rail	**Road**	**Air**
Khajuraho Group of Monuments	• Jhansi (172 Km) and Satna (117 Km) are the major railheads	• Road links to Satna, Harpalpur Jhansi (175 Km) and Gwalior (280 Km).	• No air connectivity
Mahabodhi Temple Complex at Bodh Gaya	• The nearest railway station is Gaya (17Km).	• Bodhgaya is well connected by road to Gaya (17Km), Nalanda (101 Km), Rajgir (78 Km), Patna (135 Km), Varanasi (252 Km), Calcutta (495 Km)	• The nearest airport is at Gaya 7 Km and Patna 135 Km.
Mountain Railways of India	• Mountain Railways located in Darjeeling is itself one of landmark attractions of Indian Railways	• Road connectivity via Kolkata	• No Air connectivity to Darjeeling

Location	Connectivity		
	Rail	**Road**	**Air**
Qutub Minar and its Monuments, Delhi	• Delhi is connected to all the major cities and towns by rail	• Motorable roads connect Delhi to all major cities	• International airport at Delhi
Rock Shelters of Bhimbetka	• Nearest Railhead at Bhopal (46 Km)	• Road connectivity via Bhopal	• Domestic airport at Bhopal (46 Km)
Sun Temple, Konârak	• The railheads nearest to Konark are at Puri (35 Km) and Bhubaneswar (65 Km.). These two stations are connected to all the major cities in India through long-distance trains.	• Connected via road through Puri and Bhuvansehwar	• The nearest airports are at Bhubaneshwar 65 km and Puri 35 Km
Taj Mahal	• Agra is connected to Delhi by railway lines. Many trains connect Delhi and Agra, including luxury trains such as the Palace on Wheels. Agra Station is known as Agra Cantonment Station.	• Good Road connectivity to Agra from major cities via national highways. Taj Mahal can accessed through city roads	• Nearest airport is at Delhi

b. **Wildlife Tourism**

Location	Connectivity		
	Rail	**Road**	**Air**
Corbett National Park	• The closest railway station to Corbett National Park is Ramnagar, which is 12 Km from the Park.	• Connected by road from Delhi (295 Km) via Gajraula, Moradabad, Kashipur and Ramnagar	• The closest domestic airport to Corbett National Park is 50 Km away from Corbett National Park at Phoolbagh, Pantnagar. At 295 Km from Corbett National Park, the nearest International Airport is at Delhi.
Kanha National Park	• Jabalpur (175 Km) is the nearest railhead to reach Kanha National Park	• Connected by road from Japalpur (175 Km), Khajuraho (445 Km) and Nagpur (266 Km)	• Nearest airport at Nagpur (266 Km)
Bandhavgarh National Park	• Nearest railhead at Umaria (30 Km)	• cnnected by road from Umaria(30 Km)	• No air connectivity
Ranthambore	• Sawai Madhopur is the nearest railway station, which is 11 Km away	• Accessible by road through Japiur, Sawai Madhopur and other major cities in Rajasthan	• Jaipur is the nearest airport, which is about 145 Km from Ranthambore
Madhumalai	• The nearest rail heads are in Ooty, Mysore and Coimbatore	• Madumalai can be easily accessed via road from three states- Karnataka via Mysore, which is only 91 Km away; Tamil Nadu (where the sanctuary is located) through Ooty, which is 64 Km away and from Kerala through Coimbatore (160 Km)	• The nearest Airports are in Coimbatore and Bangalore
Nagarhole	• Nearest railhead at Mysore and Bangalore	• Accessible by road from Bangalore, Mysore and other major cities in Karnataka	• Nearest airport at Bangalore
Kaziranga	• Furkating, 75 Km away from Kaziranga National Park is the nearest railhead	• Accessible by road from Guwahati and Jorhat	• Nearest airport at Guwahati (217 Km)
Periyar	• The nearest railhead is Kottayam, 120 Km away	• Kumily is the nearest town to the park and is well connected by road with other parts of Kerala	• Madurai, which is about 140 Km from Periyar is the nearest airport

Location	Connectivity		
	Rail	**Road**	**Air**
Bharatpur	• The nearest railhead is Bharatpur, which is well connected with Delhi, Jaipur, Mumbai and other parts of the country	• Bharatpur is located on the Agra-Jaipur highway and is just about two hours journey from Agra	• Nearest Airport at Jaipur
Little Rann of Kutch	• The nearest railhead is Ahmedabad (93 Km)	• Accessible by road from Ahmedabad	• Nearest airport at Ahmedabad (93 Km)
Chilika	• Nearest Railway Station is at Balugaon and Rambha on South Eastern Railways	• National High Way No. 5 touches Chilika at Balugaon, Barkul and Rambha	• Nearest Airport is at Bhubaneswar
Sunderbans	• Nearest railhead at Port Canning	• Accessible by road from Kolkata	• Kolkata is the nearest airport, which is about 131 Km from Sundarbans.

c. **Eco-Tourism**

Location	Connectivity		
	Rail	**Road**	**Air**
Backwaters, Spice Farms of Kerala	• The state has extensive rail network and is served by the Southern Railways	• The state is connected through a network of National Highways to the rest of the country. The state highways and district roads connect the various destinations within the state	• The state has two international airports at Cochin and Thiruvananthapiram and custom airport at Kozhikode. However, no direct air connectivity to the particular locations
Rishikesh, Uttaranchal	• Nearest Railhead at Haridwar	• Road connectivity via Delhi and Dehradun	• No air connectivity
Rajgarh & Tirthan of Himachal Pradesh	• The nearest railhead for tirthan and Rajgarh is Kullu.	• Road Connectivity via Delhi and ChandigarhMotorable roads connect till the main town of Rajgrah. • Tirthan is accessible by motorable road till Sai Ropa , the Base camp of Great Himalyan National Park.	• No air connectivity
SaatTal, Mukteshwar, Nainital and Mori of Uttaranchal	• Nearest railhead for Muktweshwar,Saat Tal and Nainital is Kathgodam (72 Km).	• Mukteshwar is accessible by road from Nainital (51 Km) and Haldwani (49 Km). • Saat tal is accessible by road from Delhi, via Moradabad, Rampur and Haldwani. • Nainital is accessible by road from Delhi and Lucknow	• No Air Connecitvity
Western Ghats and Rainforest of Karnataka	• The state has extensive rail network and is served by the South western Railways	• The state is connected through a network of National Highways to the rest of the country. The state highways and district roads connect the various destinations within the state	• The state has international airport at Bangalore. However no direct air connectivity to the particular locations

d. Medical Tourism

Location	Connectivity		
	Rail	**Road**	**Air**
Ayurveda - Kerala	• The state has extensive rail network and is served by the Southern Railways	• The state is connected through a network of National Highways to the rest of the country. The state highways and district roads connect the various destinations within the state	• The state has two international airports at Cochin and Thiruvananthapiram and custom airport at Kozhikode.
Hi Tech Healing – Bangalore, Chennai, Hyderabad, Delhi	• All the locations have railheads and are served by long distance trains	• All the locations are connected to major cities and towns via National Highways	• International airports at all the locations providing direct international connectivity to these cities
SPA – Kerala, UP (Agra), UT (Mussourie), Tamil Nadu (Conoor), Karnataka (Mysore), Rajasthan (Neemrana), Rishikesh (Ananda), Haryana (Nolta)	• Agra has railway station connecting it to major destinations in the country. • The nearest railhead for Mussorie is Dehradun (25 Km) • Mysore has railway station connecting it to Bangalore and other important locations in Karnataka. • The nearest railhead of Neemrana is Delhi (120 Km). • The nearest railhead of Rishikesh is at Haridwar. • Coonoor lies on the toy-train line between Mettupalayam (28 Km) and Ooty (19 Km). • Nolta lacks rail connectivity	• Good Road connectivity to Agra from major cities via national higways. • Mussorie is accessible by road from Delhi via Dehradun. • Mysore is accessible via road from Bangalore. • Rishikesh is accessible by road from Delhi,Haridwar and Dehradun. • Neemrana is accessible by road from Delhi and Jaipur. • Conoor is accessible by road from coimbatore and Ooty. • Nolta is accessible by road from Panchkula	• For Agra the nearest airport is at Delhi. Mussorie has no direct air connectivity. • Mysore has no direct air connectivity; the nearest airport is at Bangalore. • Rishikesh has no direct air connecitvity. • Neemrana has no direct air connectivity, nearest airport is at Delhi (120 Km). • The nearest airport to Conoor is at coimbatore(71 Km). • Nolta has no direct air connectivity

Location	Connectivity		
	Rail	**Road**	**Air**
Yoga – Haridwar, Bangalore, Rishikesh	• Railhead at Haridwar which also serves for Rishikesh. • Railhead at Bangalore connects it to major destinations in the country.	• Bangalore is connected to major cities via National highways. • Haridwar and Rishikesh accessible by road from Delhi and Dehradun.	• Inernational airport at Bangalore. • Haridwar and Rishikesh do not have air connectivity.

e. **Adventure Tourism**

Location	Connectivity		
	Rail	**Road**	**Air**
Water Sports			
White Water rafting & Kayaking – Goa, Karnataka, Kerala	• All the three states are connected by extensive rail network to rest of the country	• All the three states are connected to rest of the country through National Highways.	• International airport in Goa. International airport in Karnataka. Two international airports in Kerala
Diving – Lakshwadeep, Andaman& Nicobar	• Lakhshwadeep islands are not connected with rest of the country and no rail connectivity also within the Lakhshwadeep islands. • Andaman & Nicobar does not have rail connectivity with rest of the country and also within the islands	• The Lakshwadeep islands are not accessible by road from rest of the country. • The Andaman & Nicobar Islands not accessible by road from rest of India.	• Airport at Lakhshwaddep;air connectivity via Kochi. • Andaman has airport at Port Blair and connectivity via Kolkata and Chennai
Water Skiing – Diu, Colva, Covelong	• Diu does not have railway facility, nearest railway station is Veraval(90 Km). Veraval is directly connected to Rajkot and Ahmedabad by Train. • The nearest railhead to Colva is Karamalli (11Km). • The nearest railhead for covelong is Chennai (60 Km)	• Diu is accessible by road from Ahmedabad, Veraval, Rajkot and some other major cities in Gujarat. • Colva is accessible by road from Panaji (40 Km). • Covelong is accessible via road from Chennai (60 Km) and Mahabalipuram (20 Km)	• Airport in diu. • Nearest airport for Colva is Dabolim (6 Km). • The nearest airport for Covelong is at Chennai (60 Km)

Location	Connectivity		
	Rail	**Road**	**Air**
	Trekking		
Kashmir, Uttaranchal, Himachal Pradesh, Leh &Ladakh, Sikkim, Karnataka, Maharashtra, Orissa, Kerala.	• Kashmir has limited rail connectivity with only one railhead at Jammu Tawi connecting it the rest of the country. • Uttaranchal is served by the northern railways and major locations are accesible by rail. • Himachal Pradesh is served by northern railways and major locations are accessible by rail. • Leh and Ladakh do not have any rail connectivity. • Sikkim does not have any rail connectivity with the rest of the country. • Maharashtra is well connected by railway network is is served by Eastern and East Central Railways. • Orissa is well connected by railway network and is served by south eastern Railway. • Karnataka is connected with rest of the country by rail network and is served by the South Western Railways. • Kerala has extensive rail network connecting it to the rest of the country and is served by the Southern Railways	• Kashmir is connected by National Highways with rest of the country. Uttaranchal is connected by National highways with the rest of the country. • Himachal Pradesh is connected to rest of the country via National Highways. • Leh and Ladkah are accessible via road from Srinagar and Manali. • Sikkim is accessible by National Highway from Siliguri. • Orissa is connected with rest of the country via National Highways. • Maharashtra is connected with rest of the country via National Highways. • Karnataka is accessible by road from major cities and towns in the country via National Highways. • Kerala is connected by National Highways with rest of the country	• Kashmir - Airport at Srinagar. • Karnataka-International Airport at Bangalore. • Maharashtra - International Airport at Mumbai. • Kerala - Two international airports at Cochin and Kozhikode. • Orissa -Airport at Bhuvaneshwar. • Uttaranchal - Airport at Dehradun having limited operations. • Himachal Pradesh - Airport at Shimla, Kullu and Gaggal having limited operations. • Leh & Ladakh - Airport in Leh having limtied operations. • Sikkim - Airport at Gangtok

Location	Connectivity		
	Rail	**Road**	**Air**
Rock Climbing and Mountaineering			
Rock Climbing – Bangalore, Badami, Kambakkam (Chennai), Hampi (Karnataka), Pavagarh (Gujarat), Dhauj (Haryana), Delhi, Mukteshwar (Uttaranchal), Gangotri (Uttaranchal)	• Bangalore has railway station and is connected via long distance trains to major cities. • Badami has railway station and is connected by rail line from Hospet. • Nearest railhead for Muktweshwar is Kathgodam (72 Km). • Hospet is the nearest railhead (13 Km) for Hampi. • Delhi is well connected with the rest of the country by rail and is served by the Northern Railway. • The nearest railhead serving Kambakkam is at Chennai (100 Km). • Dhauj does not have direct rail connectivity. • Gangotri does not have rail connectivity	• Bangalore is connected by road to all the major cities and towns within the state and rest of the country through National and State Highways. • Hampi is accessible by road through Bangalore (350 Km) and Hospet (13 Km). • Badami is accessible by road from Hospet and Hampi. • Mukteshwar is accessible by road from Nainital (51 Km) and Haldwani (49 Km). • Delhi is accessible by road from major cities and towns within the country via National Highways. • Kambakkam is accessible by road from Chennai. • Dhauj is accessible by road from Delhi (7 Km). • Gangotri is not accessible by motorable roads, can be accessed via narrow roads suitable only for walking.	• Bangalore has international airport providing direct internal connectivity to the city. • The nearest airport to Badami is at Belgaum, which is 192 Km away. • Delhi has international airport providing direct internal connectivity to the city. • Kambakkam - Nearest airport is at Chennai (100 Km). • Dhauj does not have air connectivity. • Gangotri does not have any air connectivity
Mountaineering – Entire Kumaon and Gharwal range	• No rail connectivity in these regions. Nearest railhead is at Shimla	• The regions are accessible by motorable roads from Shimla, Ranikhet and Nainital	• No air Connectivity

Location	Connectivity		
	Rail	**Road**	**Air**
Aero sports			
Paragliding – Himachal, Uttaranchal, Rajasthan, Maharashtra, Delhi	• Himachal Pradesh is served by northern railways and major locations are accessible by rail. • Uttaranchal is served by the northern railways and major locations are accessible by rail. • Maharashtra is well connected by railway network is served by Eastern and East Central Railways. • Rajasthan is served by North Western Railways and major locations are accessible by rail. • Delhi is connected to all the major cities and towns within the country via rail network.	• All the states are connected by road with the rest of the country via National Highways.	• Delhi - International airport at Delhi. • Maharashtra - International Airport at Mumbai. • Himachal Pradesh - There are three airports in the state of Himachal Pradesh. They are at Bhuntar, Gaggal and Jubbarhatti. The air routes connect the state with Delhi and Chandigarh. There are no international airports in the state. • Uttaranchal - The state has its only airport in Jolly Grant, which is close to the state capital Dehradun and limited number of lights operate from the airport.
Parasailing – Goa, Thiruvananthapuram, Chennai and certain parts of Orissa, Manipur, North Guwahati in Assam and Delhi	• All the locations are connected by rail network with the rest of the country via long distance trains	• All the locations are connected by road with the rest of the country via National Highways.	• Domestic airport at Imphal and Bhuvaneshwar. • Internatioal airports at Chennai,Guwahati,Goa and Thiruvananthapuram

Location	Connectivity		
	Rail	**Road**	**Air**
Hang Gliding – Pune, Delhi, Chandigarh, Shimla, Mumbai, Bangalore	• Pune has railway station and is connected to all the major cities withing the country.	• Pune is accessible from Mumbai through Mumbai-Pune expressway	• Pune - Airport is situated in the Lohagaon area, about 12-Km from the city
Ballooning – Guwahati, Dehradun, Bangalore, Delhi and Jaipur	• All the locations are connected by rail network	• All the locations are connected by road with the rest of the country via National Highways.	• Bangalore has international airport providing direct internal connectivity to the city. • Guwahati has international airport. Delhi has international airport. • Jaipur has international airport. • Dehradun - Airport at Jolly Grant which is close to Dehradun

Location	Connectivity		
	Rail	**Road**	**Air**
	Aero sports		
Skiing – Manali, Kufri, Narkanda, Shoja, Triund (HP), Auli, Dyara Bugiyal, Mundali, Munsiyari (Uttaranchal), Gulmarg (J&K)	• Manali - The nearest narrow gauge railhead is at Jogindernagar (135 Km Approx). The nearest broad gauge raiheads are at Chandigarh (310 Km Approx.), and Ambala (355 Km Approx). • Kufri, Narkanda,Shoja,Triund,Auli, Dyara Bugiyal,Mundali,Munsiyari and Gulmarg do not have rail connectivity	• Kurfi is accessible by road from Shimla (19 Km). • Manali is accessible by road from Delhi via Mandi (585 Km), and from Simla (270 Km). • Narkanda is on the National Highway connecting Shimla to Kinnaur.Shoja is accessible by road from Shimla. • Triund is accessible by road from Dharmasala. • Auli is accessible by road from Joshimath (13 Km). • Dyara Bugiya is accessible by road from Uttarkashi.gulmarg is accessible by road from Srinagar (56 Km). • Mundali is accessible by road from Dehradun via Chakrata (166 Km). • Munsiyari accessible by road from Kathgodam	• No direct air connectivity at all the locations.

f.   Rural Tourism

Location	Connectivity		
	Rail	**Road**	**Air**
Pochampalli & Srikalahasti - Andhra Pradesh	• Pochampalli -No direct rail connectivity,nearest railhead at Hyderabad. • Srikalahasti - No direct rail connectivity, nearest railhead at Renigunta(25 Km)	• Pochampalli -11 Km road connects Pochampalli to the National Highway 9, 40 Km from Hyderabad. • Srikalahasti - Accessible by road from Tirupathi, Chitoor and Chennai by state highways	• Pochampalli -No direct air connectivity. Nearest airport is at Hyderabad. • Srikalahasti - No air connectivity
Sualkuchi & Durgapur – Assam	• Sualkuchi - No rail connectivity. • Durgapur - No direct rail connectivity, nearest railhead at Guwahati(217 Km)	• Sualkuchi - Accessible by road from Guwahati. • Durgapur - Accessible by road from Guwahati	• Sualkuchi - No direct air connectivity, nearest airport at Guwahati. • Durgapur -No direct air connectivity, nearest airport at Guwahati (217 Km)
Nepura – Bihar	• Connected by railway network	• Accessible by road from Rajgir and Nalanda	• No direct air connectivity, nearest airport is at Patna
Chitrakote & Nagarnar – Chatisgarh	• Chitrakote - no direct rail connectivity, nearest railhead at Raipur(300 Km). • Nagarnar - No rail connectivity	• Chitrakote - Accessible by road from Jagdalpur and Nagpur. • Nagarnar - accessible by road from Jagdalpur	• Chitrakote - No Air connectivity, nearest airport at Nagpur(300 Km). • Nagarnar - No air connectivity
Hodka – Gujarat	• No rail connectivity, nearest railhead at Bhuj (55 Km)	• Hodka is connected by road to Bhuj (55 Km)	• No air connectivity
Jyotisar – Haryana	• No direct rail connectivity, nearest rail head at Ambala	• Accessible by road from Ambala and Delhi	• No air connectivity
Naggar – Himachal Pradesh	• No direct rail connectivity, nearest railhead at Chandigarh	• Accessible by road from Kullu via Jogindarnagar	• No direct air connectivity, nearest airport at Bhuntar
Banavasi – Karnataka	• No direct rail connectivity, the nearest railhead is Shimoga -112 Km away,	• Accessible by road from Karwar via Sirsi	• No direct air connectivity, the nearest airport is at Dabolim, Goa (100 Km away)

Location	Connectivity		
	Rail	**Road**	**Air**
Aranmula & Kumbhalanghi – Kerala	• Aranmula - No rail connectivity	• Aranmula - Accessible by road from Tiruvananthapuram and Kochi	• Aranmula - no direct air connectivity, the nearest airports are Tiruvananthapuram and Kochi
Chaughan & Pranpur – Madhya Pradesh	• Chaugan - No direct rail connectivity, nearest railheads at Nagpur and Raipur. • Pranpur - No direct rail connectivity, nearest railhead at Lalitpur (35 Km)	• Chaugan - Accessible by road from Nagpur and Raipur. • Pranpur - Accessible by road from Lalitpur	• Chaugan - No direct air connectivity, nearest airports are at Nagpur and Raipur. • Pranpur - No air connectivity

Location	Connectivity		
	Rail	**Road**	**Air**
Suibajran – Khullabad – Maharashtra	• No direct rail connectivity, nearest railhead at Aurangabad	• Accessible by road from Aurangabad	• No direct air connectivity, nearest airport at Aurangabad
Pipili & Raghurajpur – Orissa	• Pipli - No direct rail connectivity, nearest railhead at Puri. • Raghurajpur - No direct rail connectivity, nearest railhead at Puri(12 Km)	• Pipli - Accessible by road from Puri and Bhuvaneshwar. • Raghurajpur - Accessible by road from Puri	• Pipli - No direct air connectivity, nearest airport at Bhuvaneshwar. • Raghurajpur - No direct air connectivity, nearest airport at Bhuvaneshwar (50 Km)
Rajasansi – Punjab	• Connected by railway network	• Accessible by road from Amritsar	• Airport at Rajasansi
Neemrana, Samode, Haldighati – Rajasthan	• Neemarana - No direct rail connectivity, Kund is the nearest railhead (25 Km). • Haldighati - no direct rail connectivity, nearest railhead at Udaipur. • Samode - No direct rail connectivity, the nearest railway station is Chomu (5 Km)	• Neemrana - Neemrana is well connected by road via the Delhi-Jaipur National Highway 8. • Haldighati - Accessible by road from Udaipur. • Samode - Accessible by road from Jaipur via Shekhawati	• Neemrana - Nemaha has no direct air connectivity, nearest airport is at Delhi (120 Km). • Headlight - No direct air connectivity, nearest airport at Jaipur. • Sam ode - No direct air connectivity, nearest airport at Jaipur(53 Km)
Lichen – Sikkim	• No rail connectivity	• Accessible by road from Bangkok	• No direct air connectivity,nearst airport at Gangtok
Karaikudi & Kazhughumelai – Tamilnadu	• Karaikudi - Connected by railway line from Chennai and having railway junction. Kazhughumelai - no rail connectivity	• Karaikudi - Accessible by road from Chennai via Trichy (NH45 and NH21O). Kazhughumelai - Accessible by road from Chennai	• Karaikudi - Airport at Madurai 960 Km). • Kazhughumelai - No direct air connectivity, nearest airport at Madurai(140 Km)

Location	Connectivity		
	Rail	**Road**	**Air**
Kamlasagar – Tripura	• No direct rail connectivity, nearest railhead at agartala	• Accessible by road from Agartala	• No direct air connectivity, nearest airport at Agartala
Bhaguwala – Uttar Pradesh	• No direct rail connectivity, nearest railhead at Saharanpur	• Accessible by road from Delhi and Saharanpur	• No air connectivity
Jageshwar & Mana – Uttaranchal	• Jageshwar - no direct rail connectivity, the nearest railhead is Kathgodam (128 Km) • Mana- No direct rail connectivity, the nearest railway stations are Haridwar and Dehradun	• Jageshwar - Accessible by road from Nainital via ranikhet. • Mana-Accessible by road from Dehradun, Haridwar and Rishikesh	• Jageshwar - No air connectivity. • Mana - No direct air connectivity, the nearest airport is at Dehradun
Balabhpur Danga & Mukutmanipur – West Bengal	• Balabhpur Danga - No direct rail connectivity, nearest railhead at Bolpur (9 Km). • Mukutmanipur - No direct rail connectivity to Mukutmanipur,nearest railheads are at Durgapur and Bankkura	• Balabhpur Danga - Accessible by road from Bolpur. • Mukutmanipur is accessible by road from durgapur or Bankura	• Balabhpur Danga - No direct air connectivity. Nearest airport is at Kolkata. • Mukutmanipur - No direct air connectivity. Nearest airport is at Kolkata

g. MICE Tourism

Location	Connectivity		
	Rail	**Road**	**Air**
New Delhi	• Rail head at Delhi having extensive rail connectivity with rest of the country via long distance trains	• Road connectivity to rest of the country via National Highways	• International Airport
Mumbai	• Rail head at Mumbai having extensive rail connectivity with rest of the country via long distance trains	• Road connectivity to rest of the country via National Highways	• International Airport
Agra	• Rail head at Agra having extensive rail connectivity with rest of the country via long distance trains	• Road connectivity to rest of the country via National Highways	• No direct air connectivity. Nearest airport at Delhi
Bangalore	• Rail head at Bangalore having extensive rail connectivity with rest of the country via long distance trains	• Road connectivity to rest of the country via National Highways	• International Airport
Chennai	• Rail head at Chennai having extensive rail connectivity with rest of the country via long distance trains	• Road connectivity to rest of the country via National Highways	• International Airport
Cochin	• Cochin has Rail head and is well connected by Rail network with rest of the country	• Road connectivity to rest of the country via National Highways	• International Airport
Goa,	• Goa is well connected by rail network with the rest of the country	• Road connectivity to rest of the country via National Highways. The national Highways passing throughout the state are NH 4A, 17, 17A & 17B.	• International Airport

Location	Connectivity		
	Rail	**Road**	**Air**
Hyderabad	• Rail head at Hyderabad having extensive rail connectivity with rest of the country via long distance trains	• Road connectivity to rest of the country via National Highways	• International Airport
Jaipur	• Rail head at Jaipur having extensive rail connectivity with rest of the country via long distance trains	• Road connectivity to rest of the country via National Highways	• International Airport
Kolkata	• Rail head at Kolkata having extensive rail connectivity with rest of the country via long distance trains	• Road connectivity to rest of the country via National Highways	• International Airport

h. **Buddhist Circuit**

Location	Connectivity		
	Rail	**Road**	**Air**
Areraj	• No rail connectivity	• Accessible by road from Bettiah and Motihari	• No air connectivity
Aurangabad	• Aurangabad has railway station of its own and is connected by railway network with the rest of the country	• Connected by road with rest of the country via National highways	• Domestic Airport at Aurangabad
Bodhgaya	• The nearest rail head is Gaya (16 Km.)	• Bodhgaya is connected by road to Gaya. 16 km to the Delhi-Calcutta Highway junction (on Grand Trunk Road) Dobhi-22 km and Patna 105 km. (via Jahanabad) or 181 km via Raigir	• No direct air connectivity, nearest airport at Patna (112 Km)
Kesaria	• no direct rail connectivity, nearest railhead is Charia(on the Muzaffarpur-Motihari NE Railway Line)	• Accessible by road from Patna and Charia	• No direct air connectivity, nearest airport at Patna
Lauria	• No direct rail connectivity, the nearest Railhead is Bettiah (26 Kms)	• Accessible by road from Bettiah, Motihari and Muzzafarpur	• No air connectivity, nearest airport at Patna
Nalanda	• The nearest railhead to Nalanda is Bakhtiyarpur, only 38 Km away from Nalanda. It falls on the Delhi-Howrah (Kolkata) main line. Several important trains connect this railway station to several major places in India	• Accessible by road from Patna	• No direct air connectivity, nearest airport at Patna (90 Km)

Location	Connectivity		
	Rail	**Road**	**Air**
Rajgir	• Rajgir has a railway station of its own, which is linked to Gaya. Several important trains from all parts of the country in turn service Gaya.	• Road network connects Rajgir to Patna (102 Km), Nalanda (12 Km) and Gaya (34 Km)	• No direct air connectivity, nearest airport at Gaya
Vaishali	• Hajipur (35 Km) on the North Eastern Railway is the nearest railway station for Vaishali	• Vaishali is connected by road to Patna (55 Km), Muzaffarpur (36 km) and Hajipur (35 Km).	• No direct air connectivity, the nearest airport is Patna 56 Km
Vikramshila	• No direct rail connectivity, nearest railhead at Kahalgaon(Bhagalpur-Sahebganj loopline)	• Accessible by road from Kahalgaon (10 Km)	• No direct air connectivity, nearest airport at Patna(239 Km)

Location	Connectivity		
	Rail	**Road**	**Air**
Ajanta & Ellora	• Jalgaon is the nearest railhead to Ajanta and Ellora caves (59 Km)	• Motorable roads connect the caves of Ajanta and Ellora with Aurangabad, Mumbai, Pune, Ahmednagar, Jalgaon, Shirdi, Nasik, Dhule, Ahmedabad, Hyderabad, Indore and Bijapur	• Aurangabad is the nearest airport for Ajanta and Ellora (106 Km)
Kaushambhi	• No direct rail connectivity, nearest railhead at Allahabad	• Accessible by road from Allahabad	• No direct air connectivity, nearest airport at Allahabad
Kushinagar	• No direct rail connectivity, nearest railhead is at Gorakhpur (44 Km)	• Accessible by road from Gorakhpur	• Gorakhpur is the nearest airport(44 Km)
Nagarjunakonda	• No direct rail connectivity, Macherla is the nearest railhead(20 Km)	• Accessible by road from Hyderabad (150 Km)	• No direct air connectivity, nearest airport at Hyderabad(150 Km)
Sanchi	• Sanchi lies on the Jhansi-Itarsi section of the Central railways. However, the most nearest railhead is Vidisha.(10 Km)	• Motorable roads connect Sanchi with Bhopal, Indore Sagar, Gwalior, Vidisha and Raisen, besides other places	• Nearest airport is at Bhopal (46 Km via Diwanganj and 78 Km via Raisen) which is connected with Delhi, Mumbai,Gwalior and Indore.
Sravasti	• No direct rail connectivity, nearest railhead at Balrampur	• Accessible by road from Lucknow	• No direct air connectivity, nearest airport at Lucknow
Sarnath	• No direct rail connectivity, the nearest railhead is Varanasi(10 Km)	• Accessible by road from Varanasi	• Varanasi is the nearest airport, at a distance of 10 km from Sarnath
Vidisha	• Vidisha has its own railway station and lies on the Delhi-Madras, Delhi-Bombay main line of the Central Railway, at a distance of 56 Km from Bhopal	• Accessible by road from Bhopal	• No direct air connectivity, nearest airport at Bhopal

Location	Connectivity		
	Rail	**Road**	**Air**
Tawang	• No direct rail connectivity, the nearest railhead is Guwahati	• Accessible by road from Guwahati via Tezpur	• No direct air connectivity, nearest airport at Guwahati
Rumtek	• No rail connectivity	• Accessible by road from Bagdogra, Darjeeling, Kalimpong and Calcutta	• Bagdogra, in West Bengal is the nearest Airport, at a distance of 124 km. Helicopter Service: To cover the civil flights, there is daily helicopter service available which fly between Bagdogra and Gangtok.
Pemagyantse	• No direct rail connectivity, the nearest railheads are Siliguri(114 Km) and New Jalpaiguri (125 Km)	• Accessible by road from Gangtok via Pelling	• Bagdogra (in West Bengal) is the nearest airport. Regular flights and helicopter services are available to Gangtok, from Bagdogra

Location	Connectivity		
	Rail	**Road**	**Air**
Dharmashala	• Pathankot is the nearest railhead in broad gauge route; however Kangra station is in the narrow gauge map, only 18 Km from Dharamshala.	• The national highways 1 and 1A connect Dhramshala to Pathankot and Jalandhar	• Kangra Gaggal Dharmashala airport , at a distance of 12 Km having limited operations
Tabo	• No direct rail connectivity, Shimla and Pathankot are the nearest railheads	• Tabo is accessible by road through three gateways: 1. From Shimla via the spiti valley, 2. From Manali via the Rohtang pass, 3. 3. From Ladakh via the Sing -O-la passes.	• No air connectivity
Leh	• Leh does not have any rail connectivity.	• Leh is accessible via road from Srinagar and Manali.	• Airport in Leh having limtied operations.
Dhauli	• No direct rail connectivity, nearest railhead is Bhuvaneshwar	• Accessible by road from Bhuvaneshwar	• No direct air connectivity, nearest airport at Bhuvaneshwar
Ratnagiri	• No direct rail connectivity, nearest railhead is Cuttack	• Accessible by road from Cuttack	• No direct air connectivity, nearest airport at Bhuvaneshwar
Udaygiri	• No direct rail connectivity, nearest railhead is Cuttack	• Accessible by road from Bhuvaneshwar and Cuttack	• No direct air connectivity, nearest airport at Bhuvaneshwar
Lalitgiri	• No direct rail connectivity, Bhubaneswar is the nearest railhead	• Accessible by road from Bhuvaneshwar	• No direct air connectivity, Bhubaneswar is the nearest airport.
Khandagiri	• No direct rail connectivity, nearest railhead is Cuttack	• Accessible by road from Bhuvaneshwar and Cuttack	• No direct air connectivity, nearest airport at Bhuvaneshwar

5.8.   Accommodation Facility

5.8.1.   Status of available accommodation facility

One of the basic infrastructural requirements of foreign tourists is accommodation facilities. As per the 2004 findings, the total number of approved rooms by the Government of India stands at around 98,000 (estimated). The category-wise details regarding the number of hotels and room availability are as follows[11]

Table 5.10: No. of approved Accommodation Units and their no of rooms

Category Of hotels	Number of Hotels	Number of Rooms
One Star	207	6765
Two Star	560	18449
Three Star	634	28783
Four Star	126	8831
Five Star	89	10982
Five Star Deluxe	78	17885
Heritage Hotel	79	2173
Unclassified Accommodations	119	3902
Total	**1892**	**97770**

Out of the total 1892 hotels, the maximum numbers of hotels are of three star category (around 33% of total) followed by two star hotels (30%). Heritage hotels and Five Star Deluxe hotels are lesser in number compared to the other categories of hotels. The chart below shows the percentage share of different categories of hotels:

Figure 5.9: Spread of Accommodation Units
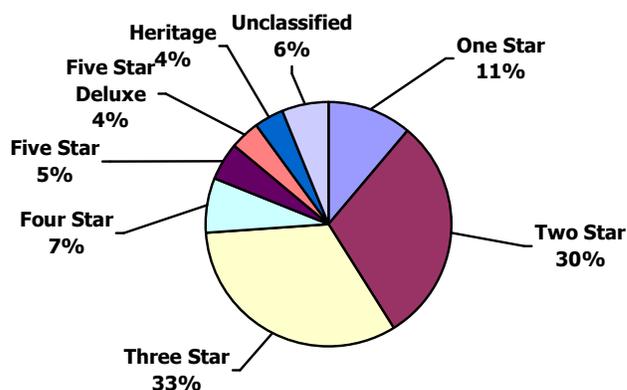
Figure 5.10: Accommodation Units - Trend in addition of capacities

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[11] Data as per "India Tourism Statistics Report, 2004" , Ministry of Tourism

	2000	2001	2002	2003	2004
☐ One Star	185	191	192	201	207
■ Two Star	444	479	476	533	560
☐ Three Star	401	440	472	551	634
☐ Four Star	104	111	120	122	126
■ Five Star	-	78	81	85	89
■ Five Star Deluxe	132	146	71	74	78
■ Heritage Hotel	67	90	77	77	79
☐ Classification Awaited	87	84	81	79	119
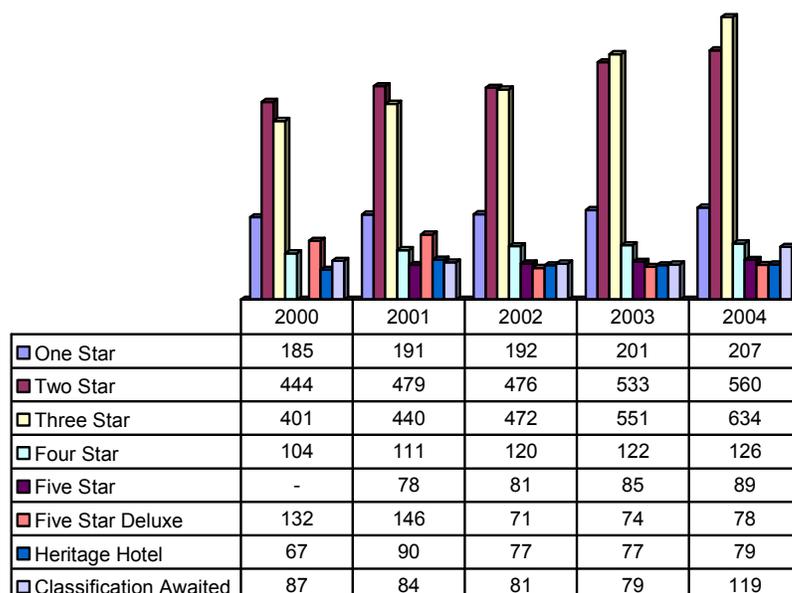
A year wise break up of the type of Hotels by no. of rooms indicate the trend as illustrated in the Chart above. The Chart indicates the fact that the growth rate of two star and three star hotels has been the greatest over the years under consideration. These 2 categories incidentally, are the largest contributors to the total no. of Hotels in the country. The growth rate as well as the population of 5 Star, 5 Star Deluxe Hotels as well as Heritage Hotels has been somewhat low compared to the 2 Star and 3 Star categories.

Figure 5.11: Accommodation Units - Trend in addition of Rooms

	2000	2001	2002	2003	2004
One Star	6169	6296	6343	6606	6765
Two Star	15078	16153	15999	17629	18449
Three Star	19271	20542	22783	26071	28783
Four Star	7588	7958	8551	8655	8831
Five Star	-	9845	10107	10416	10982
Five Star Deluxe	23598	25086	16240	16885	17885
Heritage Hotel	1758	2530	2124	2124	2173
Classification Awaited	3731	3616	3334	3334	3902
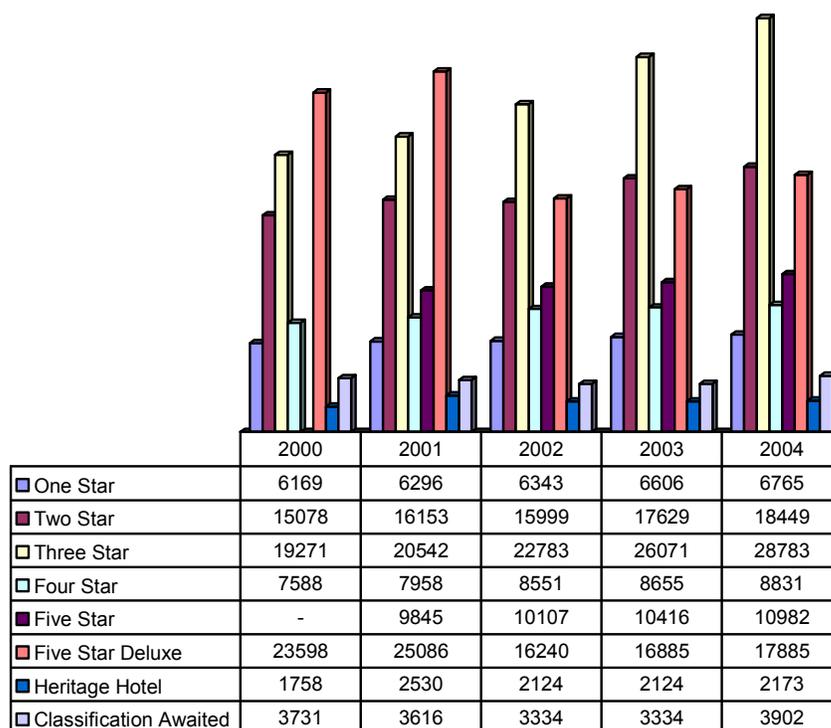
The no. of availability of rooms, however, indicates a different scenario with Maximum contribution of rooms during the year 2003-04 coming from the 3 star and 2 Star hotels respectively. Five Star Deluxe Hotels, which had the maximum share of rooms in 2000 – 2001 has lost its mantle to the 3 star categories, but still has the 3rd highest contribution as far as the total no. of hotel rooms are concerned.

The growing gap between increase in in-bound tourist traffic and availability of hotel rooms has led to room rents touching an all-time high, blunting India's attractiveness as a cost-effective tourist destination.

In Delhi alone, average room rates is hovering in the region of $310-350 a night, while it has already scaled past the $350-mark in Mumbai and over $500 in Bangalore. In comparison, a decent luxury hotel in Bangkok can be booked for around $100 a night. The result: A growing number of tour operators in the western world are beginning to stop hard selling India as an ideal vacation destination this winter-a peak travel season among foreigners.

5.8.2. Overview of accommodation facilities available

The accommodation facilities available at different destinations in the country vary considerably; while some of the locations a variety of accommodation facilities to suit the different categories of travelers, some locations are lacking in even the basic accommodation facilities. The existing level of accommodation facilities at different locations (in each product category) is given below.

Product	Location	Accommodation Facilties
Heritage Tourism	Agra Fort	Agra has a wide range of accomodations to suit all types of budgets. There are around 22 classified hotels in the city and a number of guest houses and dharmashalas.
	Ajanta Caves	No accomodation facilties available at the location.However, the location is near to Aurangabad which has a number of hotels and other accomodation facilties.
	Buddhist Monuments at Sanchi	There are no accomodation facilities at Sanchi, the nearest place having accomodatiion facilties of any kind is Vidisha (10 Km). However, Bhopal is having a wide range of accomodation facilities for tourists
	Champaner-Pavagadh Archaeological Park	No accommodation facilities are available
	Chhatrapati Shivaji Terminus	Mumbai has a wide range of accommodation facilities
	Churches and Convents of Goa	Wide range of accommodation facilities available in the state which include resorts,heritge hotels,starred and unstarred hotels,guest houses and camping facitlites.
	Elephanta Caves	Mumbai has a wide range of accommodation facilities including classified/unclassified hotels, guest houses and dharmashalas
	Ellora Caves	No accommodation facilities available at the location. However, the location is near to Aurangabad which has a number of hotels and other accommodation facilities.
	Fatehpur Sikri	Agra has a wide range of accommodations to suit all types of budgets. There are around 22 classified hotels in the city and a number of guest houses and dharmashalas.
	Great Living Chola Temples	Classified and unclassified hotels, guest houses and dharmashalas
	Group of Monuments at Hampi	There are no hotels in Hampi, however there are private lodges and guest houses available.
	Group of Monuments at Mahabalipuram	Classified and unclassified hotels, guest houses and dharmashalas
	Group of Monuments at Pattadakal	Accommodation facilities are not available at Pattadakal.
	Humayun's Tomb, Delhi	A variety of accommodations are available in Delhi which include starred, unstareed hotels and private and government guest houses.
	Khajuraho Group of Monuments	Number of private and government hotels are available
	Mahabodhi Temple Complex at Bodh Gaya	Wide range of accommodation facilities available in Bodhgaya which include private hotels, guest houses and rest houses.
	Mountain Railways of India	Classified and unclassified hotels, guest houses and dharmashalas available at Darjeeling
	Qutub Minar and its Monuments, Delhi	A variety of accommodations are available in Delhi which include starred, unstareed hotels and private and government guest houses.
	Rock Shelters of Bhimbetka	No accommodation facilities are available
	Sun Temple, Konârak	Orissa State Tourism Department's hotels and tourist lodges are available
	Taj Mahal	Agra has a wide range of accommodations to suit all types of budgets. There are around 22 classified hotels in the city and a number of guest houses and dharmashalas.

Product	Location	Accommodation Facilities
Wildlife Tourism	Corbett National Park	Government forest lodges are available inside the Parks
	Kanha National Park	Government forest lodges are available inside the Parks
	Bandhavgarh National Park	Government forest lodges are available inside the Parks
	Ranthambore	Government forest lodges are available inside the Parks
	Madhumalai	Government forest lodges are available inside the Parks
	Nagarhole	Government forest lodges are available inside the Parks
	Kaziranga	Government forest lodges are available inside the Parks
	Periyar	Government forest lodges are available inside the Parks
	Bharatpur	Government forest lodges are available inside the Parks
	Little Rann of Kutch	Accommodation is available in the government forest lodges in Madarihat, just outside the sanctuary
	Chilika	OTDC hotels at Rambha, Barkul and Satpada on Chilika
	Sunderbans	Government tourist lodges and private accomodation facilties

Product	Location	Accomodation Facilties
Eco-tourism	Backwaters, Spice Farms of Kerala	There are a wide range of accomodation facilties available which include resorts, heritage hotels,starred and unstarred hotels.The state had a total number of 204 classfied hotels in 2004
	Rishikesh, Uttaranchal	Classified/Unclassified hotels,guest houses and dharmashalas
	Rajgarh & Tirthan of Himachal Pradesh	Government rest house available in Rajgarh.Government Tourist Lodge available in Tirthan
	SaatTal, Mukteshwar, Nainital and Mori of Uttaranchal	Classified/Unclassified hotels,guest houses and outdoor camping facilities
	Western Ghats and Rainforest of Karnataka	Classified/Unclassified hotels,touist lodges and outdoor camping facilities

Product	Location	Accomodation Facilties
Medical Tourism	Ayurveda - Kerala	There are a wide range of accomodation facilties available which include resorts, heritage hotels,starred and unstarred hotels.The state had a total number of 204 classfied hotels in 2004
	Hi Tech Healing – Bangalore, Chennai, Hyderabad, Delhi	Wide range of accomodation facilties available at all the locations
	SPA – Kerala, UP (Agra), UT (Mussourie), Tamil Nadu (Conoor), Karnataka (Mysore), Rajasthan (Neemrana), Rishikesh (Ananda), Haryana (Nolta)	Kerala has total of 9 Spas and resorts located in different parts of the state. There are high end resorts and spas located in the rest of the locations
	Yoga – Haridwar, Bangalore, Rishikesh	Haridwar has one classified hotel and a number of unclassfied hotels,guest houses and dharmashalas. There are 35 classified hotels and a number of unclassifies hotels,guest houses and hostels in Bangalore. Rishikesh has a number of classified/unclassfied hotels, guest houses and dharmashalas.

Product	Location	Accomodation Facilties
Adventure Tourism	White Water rafting & Kayaking – Goa, Karnataka, Kerala	Wide range of accommodation facilities available in all the three states
	Diving – Lakshwadeep, Andaman& Nicobar	Lakshwadeep - Limited accommodation facilities at Lakshwadeeep with only one hotel on Bangaram islands. Andaman & Nicobar - The islands have number of accommodation facilities which include resorts, premium, starred and budget hotels. Also there are government and municipal guest houses available
	Water Skiing – Diu, Colva, Covelong	Diu has a number of private hotels and government guest houses. Colva and Covelong have a number of private hotels and beachside tents are also available
	Trekking – Kashmir, Uttaranchal, Himachal Pradesh, Leh &Ladakh, Sikkim, Karnataka, Maharashtra, Orissa, Kerala.	There are a number of camps at all the locations having outdoor tenting facilities
	Rock Climbing – Bangalore, Badami, Kambakkam (Chennai), Hampi (Karnataka), Pavagarh (Gujarat), Dhauj (Haryana), Delhi, Mukteshwar (Uttaranchal), Gangotri (Uttaranchal)	There are a number of camps at all the locations having outdoor tenting facilities
	Mountaineering – Entire Kumaon and Gharwal range	There are a number of government lodging facilities available on the different trekking routes
	Aero sports	
	Paragliding – Himachal, Uttaranchal, Rajasthan, Maharashtra, Delhi	There are a wide variety of accommodations available which include starred and budget hotels and government and private guest houses
	Parasailing – Goa, Thiruvananthapuram, Chennai and certain parts of Orissa, Manipur, North Guwahati in Assam and Delhi	There are a wide variety of accommodations available which include starred and budget hotels and government and private guest houses
	Hang Gliding – Pune, Delhi, Chandigarh, Shimla, Mumbai, Bangalore	There are a wide variety of accommodations available which include starred and budget hotels and government and private guest houses
	Ballooning – Guwahati, Dehradun, Bangalore, Delhi and Jaipur	There are a wide variety of accommodations available which include starred and budget hotels and government and private guest houses
	Skiing – Manali, Kufri, Narkanda, Shoja, Triund (HP), Auli, Dyara Bugiyal, Mundali, Munsiyari (Uttaranchal), Gulmarg (J&K)	Hotel facilities are available in Manali,Auli and Gulmarg. In rest of the places, camping facilities are available.

Product	Location	Accommodation Facilities
Rural Tourism	Pochampalli & Srikalahasti - Andhra Pradesh	Accommodation is available in the nearest town from where a willing tourist can visit the location availing road transport.
	Sualkuchi & Durgapur – Assam	
	Nepura – Bihar	
	Chitrakote & Nagarnar – Chatisgarh	
	Hodka – Gujarat	
	Jyotisar – Haryana	
	Naggar – Himachal Pradesh	
	Banavasi – Karnataka	
	Aranmula & Kumbhalanghi – Kerala	
	Chaughan & Pranpur – Madhya Pradesh	
	Suibajran – Khullabad – Maharashtra	
	Pipili & Raghurajpur – Orissa	
	Rajasansi – Punjab	
	Neemrana, Samode, Haldighati – Rajasthan	
	Laachen – Sikkim	
	Karaikudi & Kazhughumelai – Tamilnadu	
	Kamlasagar – Tripura	
	Bhaguwala – Uttar Pradesh	
	Jageshwar & Mana – Uttaranchal	
	Balabhpur Danga & Mukutmanipur – West Bengal	

Product	Location	Accommodation Facilities
MICE Tourism	New Delhi	There are a wide range of accommodation facilities available which include classified/unclassified hotels, guest houses, tourist lodges and dharmashalas. The city had a total of 93 classified and unclassified hotels having 10159 rooms (combined) in 2004
	Mumbai	There are a wide range of accommodation facilties available which include classified/unclassified hotels, guest houses, tourist lodges and dharmashalas. The city had a total of 110 classfied and unclassified hotels having 110778rooms (combined) in 2004
	Agra	There are a wide range of accommodation facilties available which include classified/unclassified hotels, guest houses, tourist lodges and dharmashalas. The city had a total of 23 classified and unclassified hotels having 2091 rooms (combined) in 2004
	Bangalore	There are a wide range of accommodation facilities available which include classified/unclassified hotels, guest houses, tourist lodges and dharmashalas. The city had a total of 35 classified and unclassified hotels having 2698 rooms (combined) in 2004
	Chennai	There are a wide range of accommodation facilities available which include classified/unclassified hotels, guest houses, tourist lodges and dharmashalas. The city had a total of 89 classified and unclassified hotels having 6255 rooms (combined) in 2004
	Cochin	There are a wide range of accommodation facilities available which include classified/unclassified hotels,guest houses, tourist lodges and dharmashalas. The city had a total of 46 classified and unclassified hotels having 2046 rooms (combined) in 2004
	Goa,	There are a wide range of accommodation facilities available which include classified/unclassified hotels, guest houses, tourist lodges and dharmashalas. The city had a total of 98 classified and unclassified hotels having 7464 rooms (combined) in 2004
	Hyderabad	There are a wide range of accommodation facilities available which include classified/unclassified hotels, guest houses, tourist lodges and dharmashalas. The city had a total of 52 classified and unclassified hotels having 3972 rooms (combined) in 2004
	Jaipur	There are a wide range of accommodation facilities available which include classified/unclassified hotels, guest houses, tourist lodges and dharmashalas. The city had a total of 34 classified and unclassified hotels having 2104 rooms (combined) in 2004
	Kolkata	There are a wide range of accommodation facilities available which include classified/unclassified hotels, guest houses, tourist lodges and dharmashalas. The city had a total of 30 classified and unclassified hotels having 2751 rooms (combined) in 2004

Product	Location	Accommodation Facilties
Buddhist Circuit	Areraj	No accommodation facilities available
	Aurangabad	Classified and unclassified hotels/guest houses and dharmashalas are available
	Bodhgaya	Wide range of accommodation facilities available in Bodhgaya which include private hotels, guest houses and rest houses.
	Kesaria	No accommodation facilities available
	Lauria	No accommodation facilities available
	Nalanda	No accommodation facilities available
	Rajgir	BSTDC hotels/private and unclassified hotels and dharmashalas available
	Vaishali	Bihar Tourism's tourist complex and rest house
	Vikramshila	No accommodation facilities available
	Ajanta & Ellora	No accommodation facilities available at these locations. However, these locations are near to Aurangabad which has a number of hotels and other accommodation facilities.
	Kaushambhi	No accommodation facilities available
	Kushinagar	No accommodation facilities available
	Nagarjunakonda	There are no accommodation facilities available at Nagarjunkonda, the nearest place having any accommodation facilities is Hyderabad.
	Sanchi	There are no accommodation facilities at Sanchi, the nearest place having accommodation facilities of any kind is Vidisha (10 Km). However, Bhopal is having a wide range of accommodation facilities for tourists
	Sravasti	Unclassified hotels, guest houses and dharmashalas are available
	Sarnath	Unclassified hotels, guest houses and dharmashalas are available
	Vidisha	Vidisha has a number of accommodation facilities available which include unclassified hotels, guest houses, government lodges and dharmashalas; there are no classified or starred hotels in the town.
	Tawang	Unclassified hotels and government tourist lodges are available
	Rumtek	Details of Accommodation facilities not available
	Pemagyantse	Details of Accommodation facilities not available
	Dharmashala	A variety of accommodation facilities are available at Dharmsala which suit all types of budgets which include hotels, guest houses and hostels
	Tabo	The place does not have any suitable accommodation facilities. The nearest accommodation facilities are in Manali.
	Leh	Leh offers many kinds of accommodation to suit almost every pocket and preference. There are around 73 hotels and 109 guest houses in Leh.
	Dhauli	There are no accommodation facilities available at this location. The nearest center having accommodation facilities is Bhuvaneshwar
	Ratnagiri	There are no accommodation facilities available at this location. The nearest center having accommodation facilities is Cuttack
	Udaygiri	There are no accommodation facilities available at this location. The nearest center having accommodation facilities is Bhuvaneshwar and Cuttack
	Lalitgiri	There are no accommodation facilities available at this location. The nearest center having accommodation facilities is Bhuvaneshwar
	Khandagiri	There are no accommodation facilities available at this location. The nearest center having accommodation facilities is Bhuvaneshwar and Cuttack

5.8.3.   The way ahead

As understood in consultation with the industry experts, travel agents and tour operators, there is a shortfall of approx. 60,000+ quality rooms in the country, mostly in the prime destinations across the country..

China is Asia's hottest spot for hotel development, accounting for nearly half of all new projects in the region. Asia's second most active market after China is India, with 78 projects containing 12,244 rooms in the pipeline. Of those, 44 per cent are near outsourcing office centers in cities like Bangalore, Chennai, Hyderabad and Mumbai.

Because of high costs at entry / exit points at gateway cities, the tourism itinerary is inflated by 120 per cent, making leisure tourism an extremely expensive affair compared to neighboring countries like Singapore or Malaysia, where a package, including stay and ticket, costs all of Rs.12, 000. Everyone in riding on the business-travel wave. Also, land prices in metros continue to skyrocket, project costs shoot up and it becomes logical to build a five star hotel.

A study commissioned by the Ministry of Tourism, Government of India in the 5 states of Uttar Pradesh, Uttaranchal, Rajasthan, Orissa as well as Karnataka encompassed census of accommodation units across major tourist destinations of the State. The findings indicated that the un starred accommodation units (which included youth hostels as well as Dharmashalas and Dormitories), majority of which were not approved by the Ministry of Tourism or by the State Department of Tourism constituted bulk of the accommodation units in the different locations. An analysis of the hotel records indicated that considerable proportion of the foreigners visiting the state availed accommodation in those units. Hence, the shortage of rooms across all major centres may not be to the same magnitude although there is a shortage across major locations for quality rooms in the star category hotels. The ensuing Commonwealth Games in Delhi in the year 2010 is likely to boost tourism and augment the requirement of rooms to a great extent. A study to estimate the requirement of rooms across top 50 destinations of India is currently underway and results of the same shall help immensely in taking stock of the current scenario of room availability across these locations and also in forecasting the future trends of room availability considering the different projects in pipeline.

Going purely by the room count, luxury rooms constitute 55 per cent, mid-market 30 per cent and budget hotels 15 per cent of the available capacity. If the expansion plans of the luxury hotels are approved by the government, then the situation would correct itself. As of now, 44 hotels are in different stages of development in Delhi and NCR, which total up to 8,500 rooms. This is not taking into account the DDA auction of sites where the work is yet to start. But the dilemma for the hotel investors is: What happens to the excess capacity of rooms post 2010? If there is the capacity, always a demand cab be created . If we have world-class facilities, even tourism will get a boost."

International hotel chains – such as Six Continents, Carlson Hospitality and Marriott – are looking to increase their capacity in India, one of the fastest – growing hospitality markets across the globe. A host of mid-market and budget hotel brands like accor are also chalking entry plans for the market.

Starwood also plans to introduce Four Points by Sheraton (a moderately priced hotel chain) and its luxury hotel brands – St Regis and The Luxury Collection – In India. Its other brands that have a presence in the country include Le Meridien and Westin.

The US hotelier is in advanced negotiations with Royal Palms to manage its 283 room, Rs-160-crore property under the Four Points by Sheraton brand. The hotel in Mumbai's Goregaon suburb is expected to roll out the red carpet to guests in December 2008.

Royal Palms is setting up a 100-room villa hotel in the Goregaon complex and also plans to build hotels in Hyderabad and Kolkata.

By 2010, Delhi is likely to see a 40-50 per cent growth; Mumbai will see a 20 per cent growth; Hyderabad will see a 50 per cent growth and Bangalore will see a 40 per cent growth, according to industry estimates. "For the Carlson Group, there is a greater emphasis on growth at this time than ever before. Carlson Hotels in India currently have 32 operational hotels and 27 properties under development. As far as the hotel industry's preparedness for the 2010 Commonwealth Games is concerned, New Delhi currently has a supply of 6,405 branded hotel rooms. The required accommodation in 2010 is estimated at 12,249, which is double the present number. While there are a number of hotels under development in the NCR to meet this demand, the government needs to allocate reasonably priced land for building hotels and also find a way to regularize guest houses and small hotels.

Necessity of being current with international quality standards and inventions; providing trained manpower at a time when India has emerged as one of the fastest growing hotel markets in the world; manpower attrition within the industry and to other service industries like BPOs and banks, and surviving in emergency situations like natural calamities and terrorism.

The construction of the 437-key Trident Hilton hotel in the Bandra Kurla Complex, Mumbai is also progressing. The hotel is expected to open in 2008. The construction of a 150-key Oberoi-brand luxury hotel, located next to the Trident Hilton Gurgaon, will also commence shortly.

Further, a 130-key oberoi-brand luxury hotel and 40 service apartements have been finalized near Manesar, Gurgaon district. The hotel will be owned by the Uppal Groups.

The company will build Oberoi-brand luxury hotels in Goa and Bangalore. The Goa hotel is located on a 50-acre beachfront site, which the company has owned for some time. The 225-key Bangalore hotel will be build on an eight-acre prime site, overlooking Hebbel Lake. The Bangalore hotel will be the luxury hotel located nearest the new Bangalore International Airport.

Rajgarh Palace, 25 km from Khajuraho, is being converted into a luxury hotel on a 60-acre site with private lake. Luxury hotels in the Maldives and at Siem Reap (Angkor Vat, Cambodia) are under planning, with construction expected to commence in 2007.

5.9.   Facilitation Norms

An overview of the available facilitation norms and procedure currently practised in India has been discussed in the ensuing paragraphs

5.9.1.   Procedural requirements

In order to visit India, foreign travelers require visa permission prior to entering the country. The Consular Passport and Visa Division of the Ministry of External Affairs is responsible for issuance of Indian visas to the foreign nationals for their visit for various purposes. This facility is granted through various Indian missions abroad. At present, visa application is chargeable according to the type of visa applied. The general requirements for visa facilitation are:

1. *Original passport valid for at least 6 months*
2. *Correct visa fee*
3. *Two passport size photographs (5 photographs in case of Pakistani Nationals)Supporting documents, where necessary*
4. *Duly completed application form (Pakistani and Bangladeshi Nationals need to apply on special application forms)*

5.9.2. Tourist Visa

Tourist visa is normally valid for 6 months; rest specifically depends on the country of residence. The applicant is required to submit documents in proof of his/her financial standing. Tourist traveling in groups of not less than four members under the sponsorship of a recognized travel agency is considered for grant of collective tourist visa.

5.9.3. Conference Visa

In addition to the tourist visa, conference visa is issued for attending conferences/seminars/meetings in India. The eligibility criterion for this visa is a letter of invitation from the organizer of the conference, which needs to be submitted along with the visa application. There is provision for the delegates coming to attend conferences to combine tourism with attending conferences.

5.9.4. Transit Visa

Transit Visa are valid for halts of up to 72 hours in India within 15 days from the date of issue of the visa and must be obtained before departure. Transit Visa cannot be obtained from immigration counters at ports of entry in India. Evidence of onward travel to a destination outside India is required.

5.9.5.   Visa fees

The visa fees for foreigners willing to enter India has to apply in the earmarked forms with the requisite fees indicated below. The fees are non- refundable.

Table 5.11: Visa Application Fees

Description of Visa Type	Fees
All kinds of visa other than transit and student visas valid upto to 6 months (multiple entry)	Rs. 1860/- (US$ 40)
All kinds of visa other than transit and student visas valid for over 6 months and upto 1 year (multiple entry)	Rs. 3025/- (US$ 65)
All kinds of visa other than transit and student visas valid for over 1 year and upto 5 years (multiple entry)	Rs. 6050/- (US$ 130)
Transit visa (valid for 15 days-single/double entry)	Rs. 470/- (US$10)
Student visa (valid for the duration of the course or for a period of five years, whichever is less-multiple entry)	Rs. 3490/- (US$ 75)
Overstay or Late Registration Charges	Rs. 1395/- (US$ 30)
Service Charges in case of Russians (No Visa fees)	Rs. 1860/- (US$ 40)
VISA fee for single entry for Sri Lankans	Rs. 135/-
VISA fee for double entry for Sri Lankans	Rs. 270/-
VISA fee for multiple entry for Sri Lankans	Rs. 405/-
VISA fee for Japanese	Rs. 390/-
Service Charges for Romanian nationals (No Visa fees)	Rs. 300/-

(Source : Ministry of Home Affairs)

In addition to the above, a new fee structure has been introduced for the Hungarian Tourists willing to visit India.

Table 5.12: Visa Application Fees for Hungarian Tourists

Description	Fees
Transit-Single Entry	38 US $
Transit-Double Entry	65 US $
Transit-Multiple Entry	150 US $
Visa valid upto 6 months (Single Entry)	40 US $
Visa valid upto 6 months (Double entry)	75 US $
Visa valid upto 6 months (Multiple entry)	180 US $
Visa valid upto 1 year (Single entry)	65 US $
Visa valid upto 1 year (Multiple entry)	180 US $
Visa valid more than a year	180 US $
Express service (Same day service)	Rs. 700/-

(Source : Ministry of Home Affairs)

5.10.   **Tourism Service providers**

Tourism Service providers facilitate travel and tour arrangements into the country on behalf of the tourists and are an important component of the tourism industry. The different types of tourism service providers are:

1.   Tour Operators
2.   Travel Agencies
3.   Tourist Transport Operators

There are around 6000 travel trade companies and firms comprising of tour operators, travel agents and tourist transporters. Approximately, 1500 are members of representative trade bodies, i.e. associations[12].

Table 5.13: Tourism Service providers and no. of Members

Trade Body	Number of Members
Travel Agents Association of India TAAI	1000
Indian Association of Tour Operators IATO	855
Adventure Tour Operators Association ATOA	75
Indian Tourist Transporters Association ITTA	100

Source ACNielsen ORG MARG Primary Survey

The Ministry of Tourism in order to encourage quality standards and services approves certain tourism service providers to operate as per certain guidelines. From the figures available from Ministry of Tourism, till 2004,there are around 719 approved service providers functioning all over India which include 223 travel agents, 308 tour operators, 175 tourist transport operators and 13 adventure tour operators. A state wise detail has been provided below.

Table 5.14: Tourism Service providers – State wise spread

State / UT	Tourist Operator	Travel Agencies	Tour Transport Operators	Adventure Tour Operators
Andhra Pradesh	4	7	7	-
Arunachal Pradesh	-	-	-	-
Assam	5	-	1	-
Bihar	1	-	-	-
Chhattisgarh	-	-	-	-
Goa	7	-	2	1
Gujarat	-	3	2	-
Haryana	7	-	-	-
Himachal Pradesh	-	-	-	-
Jammu & Kashmir	5	1	-	-
Jharkhand	-	-	-	-
Karnataka	3	15	12	-
Kerala	11	1	17	-

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[12] As per survey by Ministry of Tourism,2004

Table 5.14 (Contd.): Tourism Service providers – State wise spread

State / UT	Tourist Operator	Travel Agencies	Tour Transport Operators	Adventure Tour Operators
Madhya Pradesh	1	-	2	-
Maharashtra	26	42	14	-
Manipur	-	-	-	-
Meghalaya	-	-	-	-
Mizoram	-	-	-	-
Nagaland	1	-	-	-
Orissa	4	-	-	-
Punjab	-	3	3	-
Rajasthan	4	1	9	-
Sikkim	-	-	-	-
Tamil Nadu	15	25	22	-
Tripura	-	-		-
Uttar Pradesh	4	5	5	-
Uttaranchal	-	1	-	-
West Bangal	4	15	1	1
Andaman & Nicobar Islands	-	1	-	-
Chandigarh		1	3	-
Dadra & Nagar Haveli	-	-	-	-
Daman & Diu	-	-	-	-
Delhi	206	99	73	11
Lakshadweep	-	-	-	-
Pondicherry	-	3	2	-
India	**308**	**223**	**175**	**13**

Source ACNielsen ORG MARG Primary Survey

5.11. Services provided

The Ministry of tourism has classified the various categories of tourism service providers and the services that would be rendered by them for approval to operate in the country. The various categories of service providers and the services rendered by them are as follows:

Table 5.15: Tourism Service providers – Services rendered

Service Provider	Services Rendered
Travel Agencies	• Arrangement of tickets for travel by air, rail, ship, passport, visa, etc. • Arrangement of accommodation, tours, entertainment and other tourism related services
Tour Operators	• Arrangements for transport, accommodation, sight seeing, entertainment and other tourism related services
Tourist Transport Operator	• Provides tourist transport like cars, coaches, boats etc. to tourists for transfers, sight seeing and journeys to tourist places

Table 5.16 (Contd.): Tourism Service providers – Services rendered

Service Provider	Services Rendered
Adventure Tour Operator	• Arranges activities related to adventure tourism namely water sports, aero sports, mountaineering and trekking and safaris of various kinds

Source ACNielsen ORG MARG Primary Survey

5.12.   Taxation structure

A tourist on arrival to India has to pay taxes of many kinds. The different types of taxes that a foreign tourist has to pay during their visit to India are

On Arrival / Departure

A sum of Rs. 221 is charged as airport taxes on arrival/ departure to India.

On Accommodation

The luxury tax imposed by the different State governments are realized by the accommodation units on the Hotel bills. This apart there is a Value added Tax imposed by the State Governments which is also realized by the units.

On Transportation

While traveling by road, a tourist has to dish out toll taxes for entering into the territory of a particular state or on a particular stretch of the national highway passing through the state. This tax varies from state to state and is collected by the Toll Plazas situated on the highway.

On Ticketing/ Reservations

A Service Tax of 12.24% is imposed on the services provided by the Tour operators/ Travel Agents. This includes 10% service tax, 2% surcharge on the service tax and an addition 0.24% education cess.on the service tax (which is 12%)

5.13.   Tourism related Training

In order to meet the manpower requirements of the tourism and hospitality industry, tourism related training and education facilities are requisite. There are a number of hotel management and travel & tour Institutes in the country offering a wide variety of degree, diploma and certificate courses.

5.13.1.   No. of Institutes/ Courses being offered

There are a total of 175 training institutes in the area of hotel management; 50 of them are Government promoted ones (Institutes of Hotel Management and Food Crafts Institutes) while the rest are privately owned/ managed ones. Of the 125 private sector institutes, 47 are registered with AICTE. Very few have foreign affiliation. The institutes under National Council for Hotel Management and Catering Technology (NCHMCT) follow standardized courses and curriculum prescribed by the council for different professional programmes. They offer certificate courses from 6 months to 3 years duration in varied subjects. The variety of courses being offered by the government and private sector institutes are:

Table 5.17.: Courses offered in Travel and Tourism

Sector	Courses Offered
NCHMCT	• 3 years Degree in Hotel Management
	• Diploma/Certificate courses in various branches in Food Craft (6 months-12 months duration)
Private Institutes	• 4 years degree/3 years diploma in Hotel Management
	• Diploma/Certificate courses in various branches
	• P.G. Diploma in Hotel Management

Source ACNielsen ORG MARG Primary Survey

A total of approximately 18000 students are being trained in hotel management and food craft annually. Almost 14000 students are graduating with a degree or a 3 years diploma in hotel management. Only 20% of them are obtaining training in hotel management from Government promoted institutes. There are a total of 172 training institutes in the area of tour & travel management; 11 of them are Government promoted ones and 78 of them are affiliated to Universities while the rest are privately owned/ managed ones. The variety of courses being offered by the universities and other institutes are:

Table 5.18.: Institutes offering courses in Travel and Tourism

Sector	Courses Offered
Universities	• Master of tourism Management/Administration (MTA/MTM)
	• Post Graduate Diploma in Travel Management (PGDTM)
	• Bachelor of Tourism Administration (BTA)
	• Travel and tourism Management (TTM)
Private Institutes	• IATA/UFTAA certified courses
	• Post Graduate Diploma in Airlines & Travel Business Management
	• BBA (Tourism)
Government Approved	• Post Graduate Diploma in Tourism Management

Source ACNielsen ORG MARG Primary Survey

Out of the total students graduating annually, the maximum share is from institutes affiliated to universities (68%) followed by private institutes (29%). Only 3% of the students are from government sponsored institutes.

5.14.   Bottlenecks faced

There is lack of effort to integrate the different modes (rail, road and air) in order to meet the deficiencies in connectivity to the locations by one single mode.

Connectivity

The air connectivity to the major locations is very limited for the foreign tourists. There are a very few international airports in the country. The air connectivity is especially very limited for the Buddhist circuit with no international airport at any of the locations in the circuit and majority of the locations lacking direct air connectivity.

Accommodation Facility

The existing level of accommodation facilities available for the different tourism products vary considerably. The major bottlenecks faced in terms of accommodation facilities are:

Cultural Tourism – There is considerable dissimilarities in the extent of accommodation facilities at the different locations.

Wildlife tourism – The most common type of accommodation facilities available in the national parks are government tourist lodges. There is lack of adequate information regarding room/bed capacity and booking procedures in these lodges.

Eco-tourism –There are wide range of accommodation facilities available in the different locations. However, there is lack of integrated information available in different media sources for the tourists to avail the facilities.

Medical tourism – There are only limited number of spas at present which can cater to a very limited number of clients.

Adventure Tourism – There is lack of specific accommodation facilities required for this type of tourism such as outdoor camping sites, equipments, etc.

Rural tourism – There in no information on the availability of accommodation facilities on the internet or other media sources.

MICE Tourism – There is wide range of accommodation facilities available for foreign tourists, which include different category of starred hotels, unclassified hotels, guest houses, tourist lodges, etc. However, MICE tourism requires high end accommodation and hospitality services.

Buddhist Circuit – The majority of the destinations do not have adequate accommodation facilities to handle the foreign tourists. Some destinations are lacking even basic accommodation facilities.

Chapter Six

Feedback - Tourists, Travel Agents and Experts

6.1   Overview

This chapter intends to provide feedbacks received from a primary survey conducted during the course of the study. ACNielsen ORG – MARG had conducted exit interview of approx. 7500 tourists at prime tourist destinations across the country in order to obtain their first hand information about India in general. Simultaneously, feedback was also collated from the Travel agents and Tour operators to gain insights about the various facets contributing to foreign tourist flow in the country and their views on the same. The destinations where interviews were conducted were as follows:

- Delhi
- Vrindavan
- Agra
- Puri-Konark-Bhuwaneshwar
- Varanasi
- Jaipur
- Mumbai
- Chennai
- Hyderabad
- Bangalore
- Kolkata
- Guwahati
- Goa
- Mussourie

6.2.   Feedback from the foreign tourists

A synopsis of the feedback received from the foreign tourists is as indicated below.

6.2.1.   Profile of the Tourists

The profile of the foreign tourists interviewed during the study is as indicated below:-

Figure 6.1: Profile of Tourists interviewed
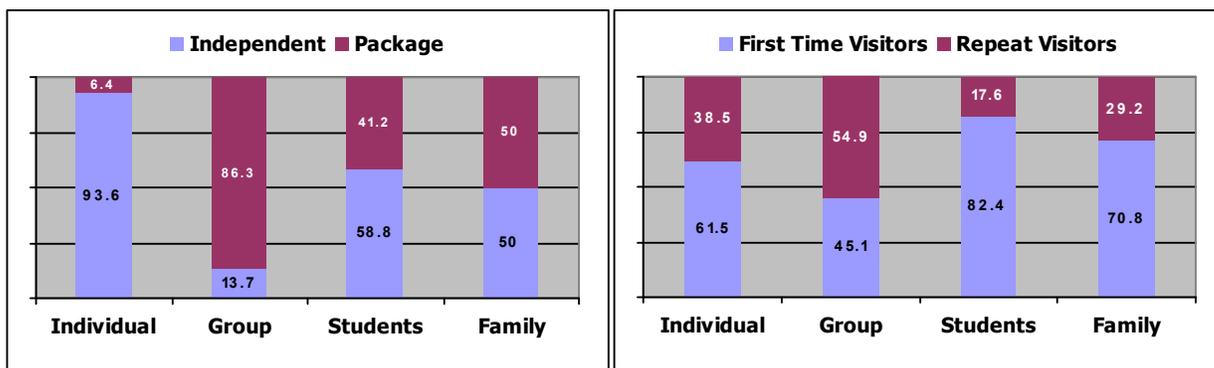
Source ACNielsen ORG MARG Primary Survey

The primary survey indicated the fact that Foreign tourists interviewed revealed that they were primarily Individual travelers. Incidence of availing Package tours were more in case of Group Travellers, Students as well as tourists traveling with family. Majority of the tourists interviewed were first time visitors. Repeat visitors were highest amongst Group travelers as well as amongst the

travelers traveling individually. Higher percentage of repeat visitors were in favour of availing package tours than that of the independent visitors as indicated in the chart below.

Figure 6.2: Profile of Tourists interviewed
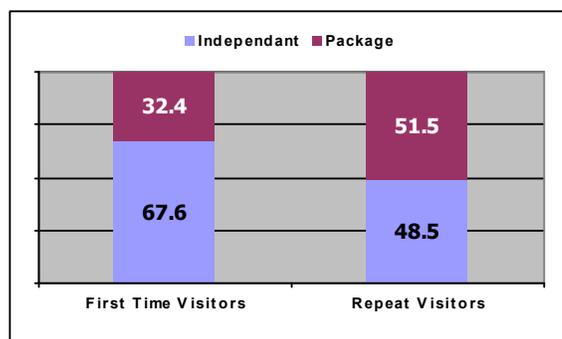
Source ACNielsen ORG

MARG Primary Survey

6.2.2. Source of Information about India

When probed about the source of information about India, the tourist responded in the mode which has been elucidated below.

Table 6.1: Source of Information about India

Source of Information	Category of Tourist				
	Individual	**Group**	**Students**	**Family**	**Total**
TV	2.6	2.0			1.8
Posters		2.0	5.9		1.2
Newspaper	1.3		11.8		1.8
Magazines	1.3	7.8	5.9	12.5	5.3
PR & Media Relations	5.1	9.8	5.9	4.2	6.5
Customer Information Services	5.1	2.0		4.2	3.5
Festivals & hallmark Events	2.6	11.8	11.8	8.3	7.1
Website	26.9	31.4	11.8	29.2	27.1
Country where I have roots	3.8	2.0	11.8		3.5
Friends	29.5	31.4	29.4	29.2	30.0
Word of Mouth	21.8		5.9	12.5	12.4

Source ACNielsen ORG MARG Primary Survey

The findings indicate that majority of tourists have indicated that they have come to know about the country from their friends as well as from the websites. This is predominantly the trends amongst the travelers traveling individually too. The group travelers in addition to the two sources indicated above have also named Festival and Hallmark events as a major source. The students have revealed that in addition to the sources mentioned by group travelers, newspaper is an important source for them. In the tourists traveling with family, magazines replace newspapers (as observed in case of students) as the source of information about India.

Table 6.2: Source of Information about India by type of tourists

Awareness about India from	Visitor Type		Tourists traveling in	
	First Time Visitors	Repeat Visitors	Independent	Group
TV	2.0	1.5	2.0	1.5
Posters	2.0			2.9
Newspaper	2.0	1.5	1.0	2.9
Magazines	5.9	4.4	2.9	8.8
PR & Media Relations	5.9	7.4	4.9	8.8
Customer Information Services	2.9	4.4	4.9	1.5
Festivals & hallmark Events	5.9	8.8	5.9	8.8
Website	29.4	23.5	26.5	27.9
Country where I have roots		8.8	2.9	4.4
Friends	29.4	30.9	29.4	30.9
Word of Mouth	14.7	8.8	19.6	1.5

Source ACNielsen ORG MARG Primary Survey

When analysed by visitor type and by the tourists traveling in groups, friends, word of mouth as well as website has appeared to be the major source of information about India.

6.2.3.   India's image as a destination

India's image as a destination as indicated by the travelers of different category, visitor type and amongst the single / group traveler have been indicated in the Tables below.

Table 6.3: India's image as a destination

India's image as a destination	Individual	Group	Students	Family	Total
Mystical Country	9.0	8.0	23.5	4.2	9.5
Rich Cultural Heritage	60.3	54.0	47.1	54.2	56.2
Diversified Terrains	19.2	14.0		20.8	16
Hub of Medical & Ayurvedic Tourism	6.4	6.0	29.4	4.2	8.2
Others	5.1	18.0		16.7	10.1

Source ACNielsen ORG MARG Primary Survey

Majority of the foreign visitors at the overall level have indicated that they consider India as a destination of rich cultural heritage, which is predominant across all sections of the visiting tourists. The image of India as a diversified terrain is the next most pre dominant factor. An interesting finding pertains to the students, higher percentages of whom consider India as a hub of Medical tourism.

Table 6.4: India's image as a destination – by type of tourists

India's image as a destination	Visitor Type		Tourists traveling in	
	First Time Visitors	Repeat Visitors	Independent	Group
Mystical Country	11.8	6.0	9.8	9.0
Rich Cultural Heritage	53.9	59.7	59.8	50.7
Diversified Terrains	15.7	16.4	15.7	16.4
Hub of Medical & Ayurvedic Tourism	10.8	4.5	7.8	9.0
Others	7.8	13.4	6.9	14.9

Source ACNielsen ORG MARG Primary Survey

The cultural heritage again features as the most pre dominant image of India amongst the different type of visitors as well as different travel groups. An interesting finding reveals that India's image as a mystical destination is most predominant amongst first time visitors compared to the repeat visitors. Similar kind of observation has been recorded for India as a hub of medical and ayurvedic Tourism.

6.2.4.   Motivation behind visiting India

The motivation factor behind visiting India as indicated by the travelers of different category, visitor type and amongst the single / group traveler have been indicated in the Tables below.

Table 6.5: Prime motivation behind visiting India – by type of tourists

Motivation behind visiting India	Individual	Group	Students	Family	Total
Land of Ancestors	1.3			4.2	1.2
Heritage	39.7	60.8	5.9	75.0	47.6
Vivid tourist spots		3.9	11.8	8.3	3.5
Culture	20.5	7.8	5.9	4.2	12.9
Leisure	6.4	13.7	11.8		8.2
Friends	6.4	5.9	17.6	4.2	7.1
Adventure	11.5	2.0	29.4		8.8
Business	7.7		11.8	4.2	5.3
Religion	5.1	3.9	5.9		4.1
Wildlife	1.3	2.0			1.2

Source ACNielsen ORG MARG Primary Survey

Analysing the various pre-set motivation factors, it appears that Heritage of the country is the most pre-dominant factor considered by the foreign tourists prior to their visit in India. Next, in decreasing order of magnitude are cultural facets, bounty of adventure activities as well as leisure modes. Similar observations can be recorded amongst the Individual travelers. Group travelers, however, consider leisure as the most important motivational factor. Students are most adventure freak and more investigative in nature, willing to enjoy every major resource to the hilt, while family travelers are more concerned about the heritage aspect of India.

Table 6.6: Prime motivation behind visiting India – by type of tourists

Motivation behind visiting India	Visitor Type		Tourists traveling in	
	First Time Visitors	Repeat Visitors	Independent	Group
Land of Ancestors	1.0	1.5	1.0	1.5
Heritage	37.3	63.2	38.2	61.8
Vivid tourist spots	2.9	4.4	4.9	1.5
Culture	17.6	5.9	11.8	14.7
Leisure	7.8	8.8	8.8	7.4
Friends	5.9	8.8	10.8	1.5
Adventure	12.7	2.9	12.7	2.9
Business	7.8	1.5	4.9	5.9
Religion	5.9	1.5	6.9	
Wildlife	1.0	1.5		2.9

Source ACNielsen ORG MARG Primary Survey

Similar trends can be observed with regard to different visitor types and the tourists traveling in different modes (viz. individuals or in groups). Heritage, Culture as well as Adventure seems to be the greatest motivation factor for the first time visitors, while heritage appeals most to the repeat visitors. For independent travelers, heritage, Culture, Adventure as well as visit to friends seem to be the most important motivation behind visiting India, while for group visitors, heritage as well as culture are the facets they have considered while choosing India as a destination for their visit.

6.2.5.   Satisfaction level w.r.t various facets of services

The foreign tourists were asked to rate the facilities available in a scale of 1-10, wherein 1 was considered to be worst and 10 was considered to be the best. During analysis, responses rated 7 and above were considered and a weighted percentage was taken to ascertain the foreign tourist's satisfaction level with regard to a particular facility/ service.

6.2.5.1.   At Gateway of Entry viz. Airports

The various services/ facilities before arrival of foreign tourists to India has been indicated in the Table below

Table 6.7: Rating of infrastructure by Foreign Tourists – Prior to arrival

Services/ Facilities	Percentage of Tourist satisfied
Tour Operators	54.7
Availability of Visa	52.9
Flight Frequency	51.9
Time in getting Visa	59.4
Ticket Bookings	57.1
Hotel Bookings	68.8
Flight Connectivity	51.6

Source ACNielsen ORG MARG Primary Survey

While the tourists are more or less satisfied with the Hotel bookings, they feel that the rest of the facets would require a boost. Particular emphasis should be provided on the frequency of flights, availability of Visa, tour operators as well as ticket bookings. A major area of concern remains flight connectivity to prime destinations within India.

6.2.5.2.   At the Hotel Lobby

Rating of different infrastructural as well as service facets on by the tourists at the Hotel Lobby

Table 6.8: Rating of infrastructure by Foreign Tourists – At Hotel Lobby

Services/ Facilities	India at overall level
Road Infrastructure	47.9
Airport Infrastructure	41.2
Accommodation Infrastructure	58.1
Hospitality Services	68.2
Connectivity Modes	53.5
Modes of Available Conveyance	41.2
Recreation/ Entertainment Facility	48.6
Food	68.2
Beverages	67.1
Handicrafts & Artifacts	60
Tour Operators and Agents	42.6
Road Infrastructure	47.9

Source ACNielsen ORG MARG Primary Survey

While the tourists are more or less satisfied with food, beverage, handicraft and artifacts as well as the hospitality services being meted out to them. A deep sense of dissatisfaction can be perceived with regard to Road infrastructure, Airport Infrastructure as well as modes of conveyance available for reaching out to the different destinations within the country.

6.2.5.3.   At Exit Points

Rating of different infrastructural as well as service facets on by the tourists at the exit points.

Table 6.9: Rating of infrastructure by Foreign Tourists – After reaching India

Services/ Facilities	India at overall level
Road Infrastructure	31.8
Airport Infrastructure	32.9
Accommodation Infrastructure	54.5
Hospitality Services	71.2
Connectivity Modes	51.2
Modes of Available Conveyance	35.9
Recreation/ Entertainment Facility	51.2

Table 6.9(Contd.): Rating of infrastructure by Foreign Tourists – After reaching India

Services/ Facilities	India at overall level
Food	76.5
Beverages	74.7
Handicrafts & Artifacts	74.1
Tour Operators and Agents	51.8
Road Infrastructure	31.8

Source ACNielsen ORG MARG Primary Survey

While the tourists are more or less satisfied with food, beverage, handicraft and artifacts as well as the hospitality services being meted out to them. A deep sense of dissatisfaction can be perceived with regard to Road infrastructure, Airport Infrastructure as well as modes of conveyance available for reaching out to the different destinations within the country.

6.3.   Discussions with Tour Operators/Agents at Prime Destinations

As a component of primary research, discussions were carried out with Tour Operators at prime destinations. The discussions were carried out with both independent and government approved tour operators having idea of foreign tourists visiting the country. The opinion was collated from the prime destinations in which the tourist interview were also conducted.

The main points of discussion were the problems faced by foreign tourists who wish to visit the country, the key steps that need to be taken by the government (both centre and state) in order to increase flow of tourists and the key themes that can be promoted at the various destinations.

6.3.1.   Major Problems faced by foreign tourists – as perceived by tour operators

According to the tour operators, the major problems faced by foreign tourists who wish to visit the country are as follows

- Cumbersome immigration procedures at airports
- Inadequate frequency of flights to various destinations in the country
- Poor road infrastructure
- Insufficient hospitality services.
- Inadequate medical facilities
- Lack of appropriate entertainment/recreation amenities at certain locations
- Unsatisfactory modes of conveyance as some additional problems
- All themes need to be promoted but the specificity needs to be kept in mind. The promotion should not overlap. E.g. all promotion schemes show Taj Mahal and Qutab Minar. The schemes such as rural tourism, tribal tourism is just on papers. A considerable overlap exists between Eco Tourism and Wildlife Tourism

6.3.2.   Suggested steps to increase flow of tourists

The tour operators feel that the government should play a more pro-active role in tourism enhancement. In order to increase foreign tourist inflow to the country, one of the prime initiatives of the government should be to increase the frequency of international and domestic flights. The Government shall also have to think about solving infrastructural problems – particularly road infrastructure. The tour operators also felt that security and safety were a major cause of concern for foreign tourists who visit the country and the government should take steps in order to prevent harassment to the tourists especially by touts and beggars at prime destinations Moreover, there should be enhancement in accommodation facilities in all categories to cater to a wide segment of travelers. Multiple taxation policy is also a major area of concern which needs to be addressed by the Government to augment the flow of foreign tourists.

6.3.3.   Key Tourism products as suggested by the Tour operators

The tour operators recommended certain themes which have potential to attract foreign tourists. The main themes which can be developed at the various destinations could be as indicated below:-

- Buddhist Circuit
- Rural tourism
- Medical Tourism
- Eco-tourism
- Pilgrimage Tourism
- Tribal Tourism

6.4.   Discussion with various Tourism Boards

6.4.1.   Hong Kong Tourism Board

   A.   *Objective*

   Hong Kong Tourism Board is a non-commercial body promoting tourism in India. Its main functions are to promote Hong Kong as a destination and act as a facilitator for potential clients. India is one of the key tourism markets for Hong Kong.

   B.   *Target Segments*

   The Hong Kong Tourism Board is targeting a wide variety of clientele in our country; the key target categories being:

   Primary Target
   1. Married With Kids (MWK – Age Group: 34-50yrs)
   2. Achievers' Married With Kids (AMWK – Age Group: 34-50yrs)

   Secondary Target
   1. Young Male Professional
   2. Honeymooners
   3. Business cum Leisure
   4. MICE
   5. Transit

   C.   *Advantages of Hong Kong as a destination*

   According to HK tourism Board official, major reasons for Hong Kong being a preferred destination for the Indian travelers are:-

   ✓ **Short Haul** – The distance to Hong Kong and other South Asian countries (i.e. Singapore, Thailand and Malaysia) is less. Traveling to these destinations requires devoting less amount of time. Subsequently, preparation and planning for visiting these countries requires lesser time and efforts. Also, due to the short haul factor, there is flexibility in the duration of trips being planned (e.g. weekend Trips, etc.)

   ✓ **Simple Visa Facilitation Procedures** – The visa facilitation procedures are simple and hassle free. Visa procedures are handled on arrival in the country wherein visa is stamped on arrival in airport. Further, for Indian nationals, there is fee waiver on visa for first 14 days after arrival (similar facility in Macau also).

   ✓ **Competitive Air Fares** – The air fares for Hong Kong, Malaysia and Thailand are comparable to some of the domestic destinations.

   ✓ **Highly professional and aggressive marketing strategies** – Hong Kong has undertaken a highly professional and aggressive marketing strategy to promote itself to the tourists. The strategy focuses on highlighting the strong points of the country and the wide variety of attractions it has to offer. The focal point of the marketing strategy is experience management wherein the moment travelers walk in to the airport until the moment they go back; they undergo multiple varieties of wholesome experiences. Further, it is constantly improvising on the marketing concepts to prevent destination fatigue and keep the destination interesting to the travelers.

   ✓ **Customised promotional campaign** - It has developed customized promotional campaigns to specifically target the Indian travelers; keeping in mind the various target categories. It is offering a plethora of extra-curricular activities (like Feng Shui tour, Jade Appreciation Tour, Tai Chi Tour, etc.) complementary to the travelers. Moreover, it has come out with customized destination guides for different target category of travelers.

D.   *Major constraints faced*

According to Hong Kong Tourism Board official, the major constraints they are facing in generating more business from India is:-

Limited availability of flights – At present, there are 20 weekly flights only from Delhi and Mumbai; this limits the number of passengers traveling to the destination. Moreover, as Hong Kong is not part of the ASEAN, it does not enjoy the benefits of Open Sky Policy with India (Singapore, Malaysia, Thailand are part of ASEAN). However, they are attempting to overcome this constraint by providing package deals involving stopover flights.

E.   *Areas of improvement India can think of*

The major areas of improvement India can think of from South Asian countries, particularly Hong Kong are
   ✓ How to package and market as destination.
   ✓ Focus upon a wide array to customized and tactical promotional campaigns for different target category segments.

6.4.2.   Singapore Tourism Board

A.   The Board

The Singapore Tourism Board (STB) is an economic development agency for promotion of tourism in the country. It has a number of offices worldwide including India. India is one of the key growth markets for Singapore and it is pursuing an aggressive promotional strategy to attract customers from our country. The key tourism segments/products Singapore is promoting are:

B.   Products

Conventional Products

- Sightseeing and attractions
- Business travel

Emerging Products

- Healthcare and education services

C.   Advantages of Singapore as a destination

According to STB official, major reasons for Singapore being a preferred destination for the Indian travelers are:-

✓ **Short Haul** – The distance to Singapore and other South Asian countries is less. Traveling to the country requires devoting less amount of time in preparation and there is also flexibility in travel duration. (e.g. weekend Trips, etc.)

✓ **Simple Visa Facilitation Procedures** – The visa facilitation procedures are simple and hassle free.

✓ **Competitive Air Fares** – The air fares for Singapore are comparable to some of the domestic destinations.

✓ **Aggressive marketing strategy** – Singapore has undertaken an aggressive marketing strategy to promote itself to the tourists. The strategy focuses on highlighting the dynamic nature of the city and the multiple varieties of experiences it can provide to the tourists in terms of culture, cuisine, arts and architecture. Further, it has developed a customized promotional campaign especially for the Indian travelers which include celebrity association (e.g. Krissh movie promoted Singapore).

D.   Major Constraints

According to Singapore Tourism Board official, the major constraints they are facing in generating more business from India are:

Frequency of flights –Though as part of the ASEAN, Singapore enjoys the benefits of Open Sky Policy with India, there is no flexibility in the number of flights to cater to additional tourists during the peak season. The limited frequency of flights is the major disadvantage for STB in generating more business from India.

E.   Important Fact

Singapore established its first tourism advisory council outside the county in India in February 2004. The Council offers a formal platform where experts from various industries provide the STB with views on its strategies on growing and developing the Indian market. With insights into new market opportunities and trends, the STB hopes to develop keener marketing strategies, products and services that will better meet the needs of the Indian market and strengthen bilateral ties with India.

6.4.3.   Macau Government Tourist Office (India Representative)

A.   About MGTO

The Macau Government Tourist Office (MGTO) is responsible for pursuing the overall goals defined for the country's tourism Sector. In order to promote Macau's tourism, MGTO has set up marketing/public relations representative offices in 18 countries worldwide including India.

B.   Advantages of Macao as a destination

According to MGTO representative in India, major reasons for Macau being an emerging destination for the Indian travelers are:-

- ✓ **Short Haul** – The distance to Macau from India is less. It takes lesser amount of time compared to other South East Asian Countries

- ✓ **Simple Visa Facilitation Procedures** – The visa facilitation procedures are simple and hassle free. Visa procedures are handled on arrival in the country wherein visa is stamped on arrival in airport. Further, for Indian nationals, there is fee waiver on visa for first 14 days after arrival.

- ✓ **Easy access from Hong Kong** – Tourists can conveniently travel to Macau from Hong Kong without any additional visa facilitation procedures. Also, the time taken to travel between the two countries is quite less and the tourists get the option of traveling to two destinations.

✓ **Marketing strategy**– The MGTO has undertaken an aggressive promotional strategy which focuses on the multi-cultural heritage and state-of the art facilities of the country. It has developed a calendar of festivals, sports competitions and special events all year around especially for tourism promotion.

C.   *Constraints faced*

The major constraint in generating business from India are:

Lack of awareness about the country – There is lack of awareness in Indians regarding the country. The other South Asian countries such as Hong Kong, Singapore, Malaysia and Thailand enjoy a higher visibility in the Indian travelers' itinery.

7.1   Overview

This chapter attempts to take a peek at the possible inflow of the foreign tourists as well as the possible markets and the products that can be targeted for them.

7.2.   History of foreign tourist arrivals in India

Foreign tourist arrivals to India started growing prolifically from the year 2002. For a period of 6 years (1996-2001) Foreign tourist arrivals hovered around the 2.5 million mark growing a a meager CAGR of 2.1% for the years under consideration. From the year 2002- 06, foreign tourist arrivals recweived a tremendous boost resgistering a gargantuan growth at a CAGR of 16.8% for the same time period. The graph below compares the scenario and highlights the fact that India has emerged formidably in the World Tourism Map.

Figure 7.1: Foreign Tourist flow in India 1996-2006
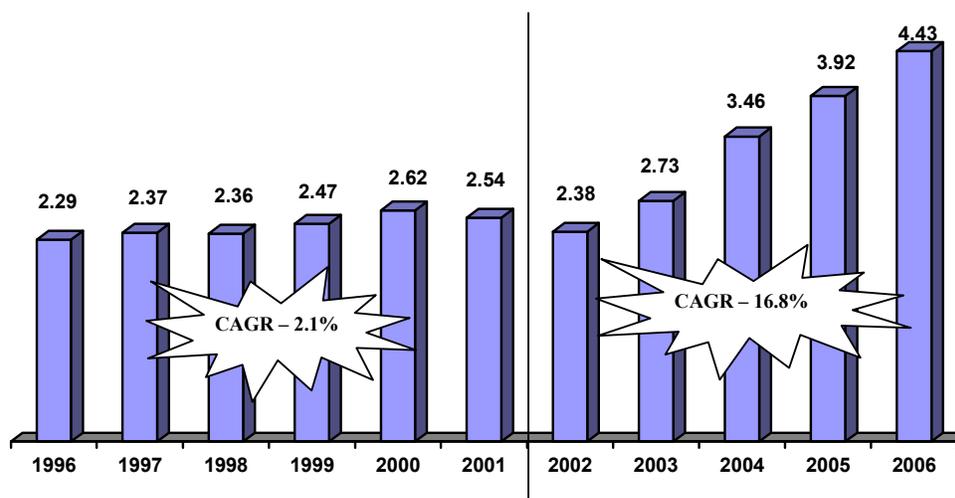
All figures in Million   *Source: Statistics compiled by Ministry of Tourism*

7.3.   What can be the future trend w.r.t Foreign Tourist arrivals

In forecasting the future trends of foreign tourist arrivals, ACNielsen ORG-MARG has considered 3 scenarios. The first one has been named **"The Vision"** as stated in the title of this study. The 2nd scenario has been named **"Realistic Scenario"** in which a growth rate for the year 2002-06 has been considered and it has been assumed that the same would continue for the subsequent period under consideration. The 3rd scenario has been named as **"Scenario based on Current Growth rate"**, wherein growth rate for the 2006 over 2005 has been considered. The projections indicate how much of the foreign tourist arrivals can be achieved in the 3 scenarios and intends to present a comparative picture of the same.

Figure 7.2: Predicted Foreign Tourist flow in India (2007-2015)
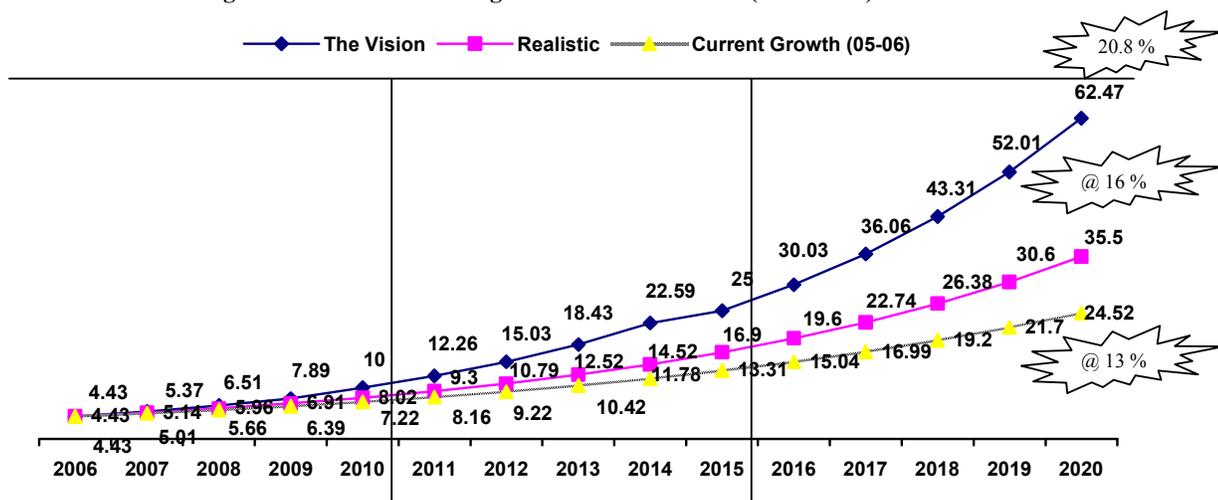
All figures in Million   *Source: Projection based on statistics compiled by Ministry of Tourism*

The aforesaid figure indicates that growing at the current rate the foreign tlourist arrivals would reach approximately 25 Mn, while considering the realistic growth rate we can reach 17 million foreign tourist arrivals by the year 2015. Moving forward with the same trendwe can achieve 62.47 Mn arrivals in the year 2020 growing at 20.8%, 35.5 Mn growing at 16% and 24.52 Mn growing at 13% respectively.

7.3.1.   What can be the likely implications?

The aforesaid projections indicate that we shall have to handle/accommodate additional foreign tourists to achieve the predicted targets. The actual no. of foreign tourists being handled per day currently and what we shall have to handle to achieve the 3 predicted scenarios have been depicted in the Tables below:-

Table 7.1: Actual and Additional tourist arrivals/ day - 2006 over 2005

2005 Tourist arrival	2006 Tourist arrival	2005 Tourist arrival/day	2006 Tourist arrival/day	Additional tourists/ day
3920000	4430000	10740	12137	1397

All figures in Actuals   *Source: Calculations based on statistics compiled by Ministry of Tourism*

The aforesaid table implies that we have handled 12137 tourists/ day, which is 1397 more than the no. of tourists handled in the year 2005. Based on this, the actual and additional tourist arrivals for the 3 scenarios have been calculated for the year 2010 and 2015. The prime idea is to draw comparatives between the current capacity of handling foreign tourists vis a vis the projected trends for the years 2010 and 2015.

Table 7.2: Actual and Additional tourist arrivals/ day – 3 scenarios of projection

Scenarios of Tourist Flow	Implications – Tourists to be accommodated			
	The Year 2010		The Year 2015	
	Actual Tourists / day	Additional Tourists / day [1]	Actual Tourists / day	Additional Tourists / day [1]
The Vision	27397	15260	68493	56356
Realistic Scenario	21976	9839	46301	34164
@ Current Growth Rate ('05-'06)	19789	7652	36460	24323

All figures in Actuals   *Source: Calculations based on statistics compiled by Ministry of Tourism*

[1] – Over current foreign tourist arrivals/ day - 12137

The aforesaid table indicates that we shall have to accommodate an additional 15260 by the year 2010 and 56356 in the year 2015 if we are to achieve 25 million foreign tourist arrivals by the year 2015. To achieve 16 Million tourists, we shall have to handle 9839 additional tourists in the year 2010 and 34164 tourists in the year 2015. If the current growth rate sustains we shall have to handle 7652 additional foreign tourists in the year 2010 and 24323 additional foreign tourists in the year 2015.

7.3.2.   Can a growth rate above 20% be achieved in foreign tourist arrivals?

The question remains, whether such robust growth rates (Above 20%) w.r.t foreign tourist arrivals have been achieved and sustained by any country in recent past? Case studies ndicate that certain South East Asian countries have infact achieved such robust growth rates in recent times. Malaysia has achieved 25% growth rate for the year 2003-05, while Singapore has recorded a 21% growth for the same period. The illustration will describe the findings vividly.

Figure 7.3: Growth achieved in Malaysia and Singapore (2003-05)
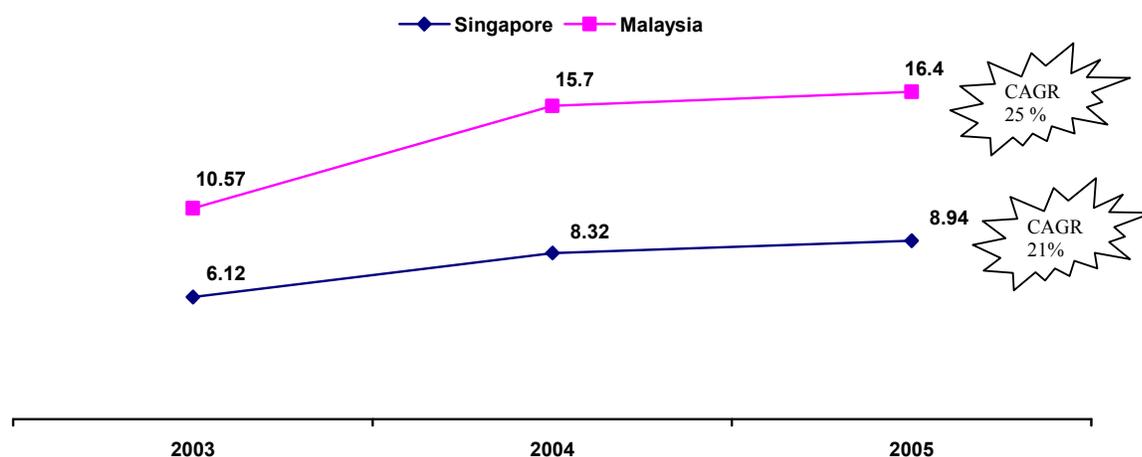
Tourist arrival figures in Million and growth rate in percentages
Source: Data compiled by respective tourism authorities
But were they able to maintain this robust growth rate for a long time? Analysis of a 7 year data indicates a different scenario altogather.

Figure 7.4: Growth achieved by Malaysia, Singapore, Thailand (1999-2005)
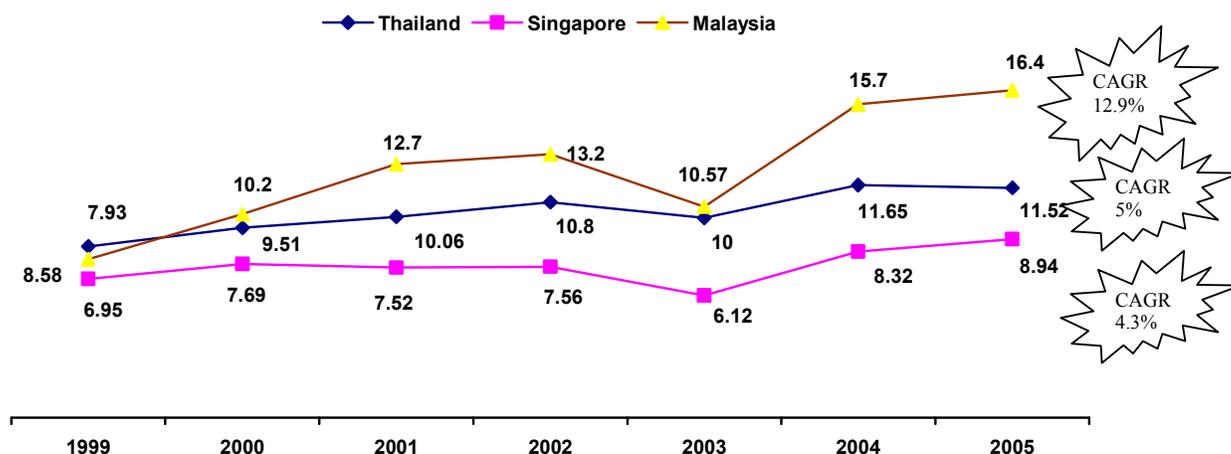
Tourist arrival figures in Million and growth rate in percentages
Source: Data compiled by respective tourism authorities

The data indicates the fact that in the long run none of the countries have been able to sustain a robust growth rate as recorded by them in the year 2003-05. Foreign tourist arrival in Thailand, a promising nation in South East Asia in terms of attracting tourists, has also been considered for analysis. This indicates the fact that though achiving a robust growth rate is possible for a short period of time, it is an uphill task to maintain the same over a long period. The year- on - year growth rate in foreign tourist arrivals also showcases the similar scenario.

Table 7.3: Y-O-Y growth rate Malaysia, Singapore, Thailand (2000-05)

Countries	2000	2001	2002	2003	2004	2005
Thailand	10.82	5.82	7.33	-7.36	16.46	-1.51
Singapore	10.54	-2.2	0.6	-19.04	35.92	7.4
Malaysia	28.9	25	4	-20.4	48.5	4.5

All figures in percentages   *Source: Calculations based on data compiled by respective tourism authorities*

7.3.3.   How these countries achieved a robust growth rate?

Though theses countries have not been able to sustain the robust growth rate, yet they have recorded fascinating growth rate of 20% + for a short period. ACNielsen ORG-MARG carried out a case study to identify the USP's being offered to the foreign tourists by these countries.

Table 7.4: Case Study – USP of Malaysia, Singapore, Thailand

Parameters	Singapore	Malaysia	Thailand
Background	• Banks on the cultural diversity and an infrastructure which is focussed specifically on tourism • Has drawn 8.32 Mn Tourists in 2004 (Source : WTO, 2004-05)	• Banks on the heritage and maintained and nurtured resources • Received 15.7 Mn tourists and is ranked 13 in total tourist arrivals (Source : WTO, 2004-05)	• Banks on the heritage and exotic resources • Received 11 Mn tourists and is ranked 18 in total tourist arrivals (Source : WTO, 2004-05)
Tourism Products	• Leisure/ Amusement Parks/ Resorts • Art & Culture • MICE • Shopping Festivals	• MICE • Shopping Festivals • Natural Resources • Adventure	• Beach Holidays • Family Destinations • Culture/ Religion • Sports • Trendy products
Promotional Modes	• Promotes through the Singapore Tourism Board, which identifies Target markets, carries out liaison with Agents to promote the country	• Aggressive campaign " Malaysia – truly Asia" • Electronic Media, Trade Shows & promotions • Tourism Ministry runs a media centre which continuously updates information	• Promotes through the Thailand Tourism Authority, which identifies Target markets, promotes Cambodia, Laos, Myanmar, Thailand, Vietnam and takes steps to re-brand new products

The aforesaid table indicates the fact that these countries have developed certain specific tourism products and has marketed themselves aggressively to draw foreign tourists to their soil. Additionally, they have spruced up their infrastructural amenities to deal with a traffic load. The prime objective is to make the stay of foreign tourists a memorable one. The handling of tourists from their arrival to departure, which is typical of those ountries have been elucidated in the figure below.

Figure 7.5: Growth achieved by Malaysia, Singapore, Thailand (1999-2005)
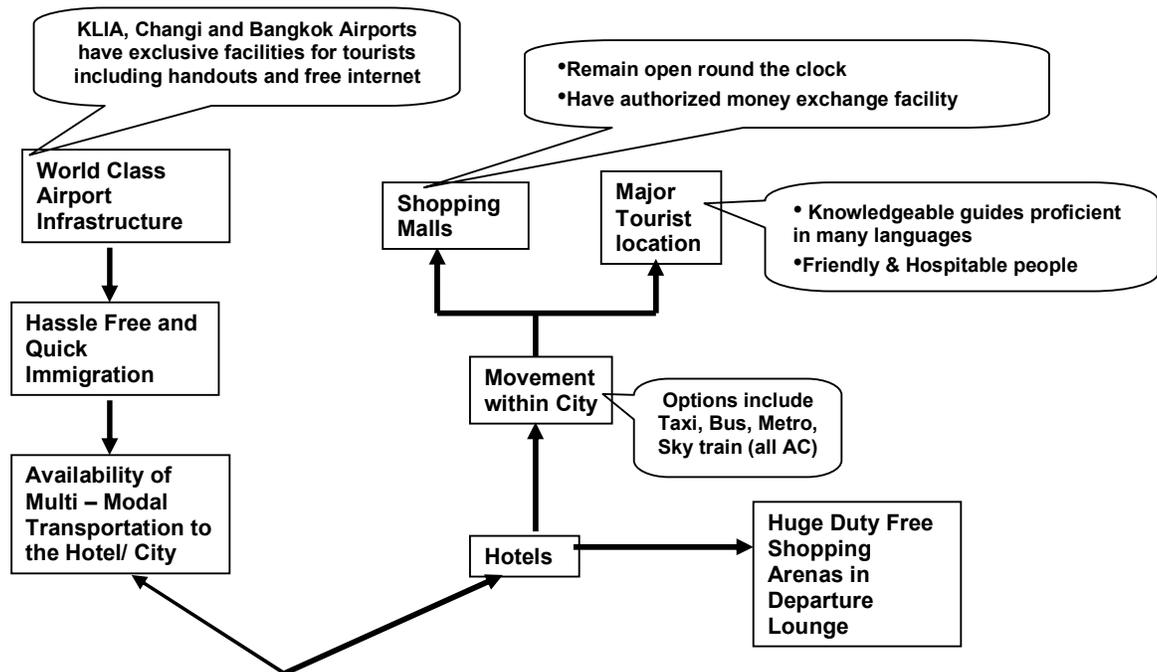
To sum up, these countries have taken the following measures:-

– **Head of the State is** *involved in strategizing and planning resources for augmenting tourist flow*

– *An Air Conditioned environment to take care of the torrid equatorial climate and facilitate similar tourist flow round the year*

– *Availability of authorized money exchanger and trendy telephone booths at every vicinity*

– *Stringency in terms of cleanliness and hygiene, information disseminated to tourists about consequences of law violation*

– *Tout Free / Beggar free zones near prime tourist spots/ eateries/ shopping malls*

– *Round the clock shopping extravaganza*

– *Huge and swanky duty free shopping arena – to remind the visitor about the visit and motivating them on a future one*

7.3.4. **How are we placed against those countries?**
India has certain inherent strengths and areas of laggard wherein it needs to improve upon. The same has been presented in the Table below.

Table 7.5: India vs. other countries – where we stand

Inherent Strengths of India	Where we need to emulate these countries
➢ Access to natural as well as physical resources which these countries cannot offer even at a collective level ➢ Our promotion in specific products have been the best in the world ➢ We have achieved considerable growth in recent years	➢ In terms of Cleanliness and Hygiene at the public places especially eateries ➢ Ensuring Tout free and beggar free zones in proximity of prime tourist spots ➢ Developing conducive infrastructural amenities at gateway of entry/ exit to attract more tourists

7.3.5. **Conclusion**
The aforesaid discussion indicates that India has the potential to achieve a robust growth rate. Though achieving and sustaining a growth in excess of 21% for a period of 9 years seems to be a daunsting taks, but it can be achieved if infrastructural and other subsidiary modes are geared up.

8.1   Overview

The findings of Tourism sector of India has highlighted a typical trend as elaborated in course of discussion of the report. The in bound foreign tourist traffic has been growing steadily over the past few years and India has the potential to emerge as a major frontrunner in the world tourism scenario. However, Strengths, Weaknesses, Opportunities and Threats of the Indian Tourism at an overall level, in view of the challenges thrown up by competing nations, as understood from the feedback received from different sources, discussed above, are elaborated below: -

Strengths

➢ India has an immense bouquet of destinations of diverse types, more than what many countries have to offer together at an aggregate level.

➢ A rich saga which offers an unique combination of past and present, which includes architecture, culture, modern amenities and facilities as well

➢ Some products like "Rural Tourism" are unique in nature, which no other country has thought of or conceived of.

➢ A wonderful promotional campaign which has attracted attention of millions of globe trotters across the world.

Weaknesses

➢ Lack of co-ordination amongst the States as well as Centre in promoting destinations/ products. The Centre as well as the State promotes destinations independently. Such multiplicity of destinations creates confusion in the minds of the foreign tourists visiting / willing to visit India as where should one start from?

➢ Procedure for release of Visa is a comparatively lengthy procedure, compared to the South East Asian nations

➢ Certain airports lack appropriate infrastructure which stops foreign airlines from entering

➢ Lack of appropriate connectivity amongst certain prime destinations within the country. E.g. Air fares between certain domestic destinations within the country is equivalent or somewhat more than connecting flights abroad. Major markets are not well connected either. A connectivity scenario has been provided in the annexure

➢ Lack of quality accommodation facility amongst major destinations across the country. Demand spurs higher room rent, which eats up considerable proportion of a foreign tourist's budget. Subsequently, the tourist stays for a considerably lesser time and in the process has limited period of exposure to the country and its resources in general

➢ Climate of certain locations within India being temperate in nature, there is considerable hindrance in marketing those places as a "365 day destination" unlike major South East Asian Countries, which have geared up its infrastructure to deal with this type of climate.

Opportunities

➢ India as a destination provides "value for money" compared to the other South East Asian as well as South Asian nations

➢ India offers diverse kinds and types of destination, in form of a complete package, compared to the south east/ far east countries which strongly promote one or two themes/ products.

➢ Wide base of English speaking population – a major advantage compared to the South East Asian nations

➢ Booming economy, growing foreign investment in the major sectors have prompted immense flow of foreigners in recent times. Word of mouth has promoted Indian Tourism on the whole.

➢ The International events like the upcoming Commonwealth Games in New Delhi in the year 2010 presents India with a platform to attract more and more foreign visitors.

Threats

➢ China is developing it's infrastructure keeping in mind the 2008 Olympics and it plans to use this as a major event in attracting tourists. The Beijing – Lhasa railway line is an important indicator in this direction.

➢ Pro active and systematic marketing efforts of the comparatively smaller South East Asian nations and their focus on developing an infrastructure based on tourism.

➢ Off late, Sri Lanka is actively promoting it's tourism resources with focus mainly on its natural resources (sprawling beaches, evergreen forests, tea gardens)

➢ Dubai is aggressively marketing itself as a major tourism destination. The world's most ambitious project, the Dubai waterfront is shaping up to be a major tourist attraction of the world, which on completion is likely to draw scores of tourists to witness this engineering marvel.

8.2. Whom can we target?

8.2.1. Composition of Foreign Tourists visiting India

A composition of foreign tourists visiting India and their country of origin has been elaborated in the Table below:-

Table 8.1: Composition of Foreign Tourists visiting India

Continents	Contribution (%)		Prime Countries
	2004	**2005**	
North America	19.1	19.6	USA, Canada
Central & South America	0.8	0.9	Brazil, Mexico
Western Europe	32.6	32.7	UK, France, Germany, Italy, Spain, Netherlands
Eastern Europe	2.4	2.6	CIS, Poland, Czechoslovakia
West Asia	3.6	3.4	Israel , UAE, Oman, Saudi Arabia, Turkey
South Asia	22.9	21.5	Bangladesh, Pakistan, Nepal, Sri Lanka, Bhutan
East Asia	5.7	5.8	China, Japan, South Korea, Malaysia, Singapore, Thailand
Australasia	2.9	3.1	Australia
Africa	3.3	3.4	South Africa, Mauritius, Kenya, Nigeria, Mauritius

All figures in percentages   *Source: Bureau of Immigration, Government of India*

The aforesaid table indicates the fact that Western Europe is the topmost contributor followed by South Asia and North America. Similar trends have been observed for the year 2004 as well as 2005. Countries which can be classified as "Emerging potential" are East Asia and Australia.

Table 8.1a: Foreign Tourist Arrivals from Central and South America

Central & South America	1997	1998	1999	2000	2001	2002	2003	2004	2005	CAGR
Argentina	3202	3776	5464	3094	2906	1359	1805			-9%
Brazil	4821	6498	8868	4060	3819	3622	4528	7397	7005	5%
Mexico	2364	3462	5048	3334	3473	3105	3563	4570	5398	11%
Chile	793	1433	2182	1128	1088	829				1%
Columbia	1060	2146	3131	947	1142	1019				-1%
Others	6624	9965	18608	12643	11727	9586	11758	16198	23183	17%
Total	**17011**	**23701**	**37988**	**23131**	**21925**	**17672**	**21654**	**28165**	**35586**	**10%**

All figures in absolute nos   *Source: Bureau of Immigration, Government of India*

The Table 8.1a above indicates that the arrival proportion of foreign tourists from Central as well as South America is on a lower side. However, to ascertain whether this is the trend across major contributing countries a country-wise analysis has been undertaken. The findings from Bureau of Immigration have been indicated above. It can be observed that the base from these countries is not only small but the growth rate is not encouraging either.

Table 8.2: Composition of Foreign Tourists visiting India

Countries	2002	2003	2004	2005
UK	387846	430917	555907	651083
USA	348182	410803	526120	611165
Canada	93598	107671	135884	157643
France	78194	97654	131824	152258
Germany	64891	76868	116679	120243
Japan	59709	77996	96851	103082
Malaysia	63748	70750	84390	96276
Australia	50743	58730	81608	96258
Singapore	44306	48368	60710	68666

All figures in absolute nos.   *Source: Bureau of Immigration, Government of India*

The aforesaid table re-iterates the fact as stated in Table 8.1, except the fact that this table shows a country-wise break up for the period 2002-05. The Table indicates the fact that visitors from UK & USA leads the fray of foreign tourist visits. Canada is in the 3rd spot, while visitors from Germany, France, Japan, Malaysia and Australia has grown considerably in recent times.

8.2.2. Which countries to target and why

The following table indicates the potential target markets, their growth for 2002-05 period, how they face up against each other and why they have been choosen as potential markets.

Table 8.3: Potential markets, their growth in recent times and reasons for considering them

Potential markets	CAGR of tourist arrivals for 2002-05 period	Remarks
United Kingdom	18.8%	• India receives largest no. of visitors from this country.
United States	20.6%	• Has the 2nd largest contribution in terms of total tourist visits.
Canada	19%	• Has emerged as the 4th largest contributor in 2005
France	24.9%	• Ranked 5th in 2005 with 0.15 Mn tourist arrivals
Germany	22.8%	• Has emerged as the top tourism spender in 2006. Total arrivals in the tune of 0.12 Mn
Malaysia	14.7%	• One of the major contributors from South East Asia. On verge of touching 0.1 Mn in 2005
Australia	23.8%	• No. of visitors have doubled in 4 years time. On the verge of touching 0.1 Mn in 2006
Japan	20%	• Has touched 0.1 Mn in recent times
Korea	19.3%	• Ranked 18th in terms of total arrival in 2005. Total visitors clocked approx. 0.05 Mn

All figures in percentages   *Source: Calculations based on data received from Bureau of Immigration, Government of India*

The aforesaid table indicates that UK, USA and Canada shall continue to remain at the top of potential markets for India, while France, Germany, Malaysia, Australia and Japan would be the 2nd lot of potential markets. Korea and China can be targetetted as the next best potential market.

8.2.3. What can be the target no. of visitors from target countries if we are to achieve 16.9 Mn

The following figures were arrived at by finding out proportion of foreign tourist arrivals to the total foreign tourist arrivals for the period 2002-05. In the similar way, proportion of foreign tourists from these countries were calculated for the year 2015 assuming we were to achieve 25 Mn foreign tourist arrivals. Then using the tourist arrival figure for the year 2005 and and derived figure of 2015, CAGR was calculated for the period and arrivals from each country was projected. The findings for the year 2010 and 2015 has been presented in the Table below:-

Table 8.4: Potential markets, target arrivals in the year 2010 and 2015

Target Markets	Target Tourist Arrivals (in Mn.)	
	2010	**2015**
U.K.	0.86	1.5
U.S.A	1.6	4.4
Canada	0.88	2.2
France	0.68	1.7
Germany	0.56	1.4
Japan	0.6	1.5
Malaysia	0.64	1.6
Australia	0.88	1.7
Singapore	0.36	0.9
Netherlands	0.08	0.2
Korea (South)	0.6	1.5
China	0.52	1.3
Thailand	0.56	1.4
Others	1.18	3.7
Total Target Arrivals	**10**	**25.00**

Source: Derivations based on data received from Bureau of Immigration, Government of India

8.2.4. What tourism products can be the targeted

As per opinion of the different stakeholders (travel agents and tour operators) during primary survey a categorization of potential target markets and target products have been done as elaborated in the Table below.

Table 8.6: Potential markets and target products

Countries	Cultural/ Heritage	Wildlife	Eco Tourism	Medical	Adventure	Rural	MICE/ Business	Budhdhist/ Religious Circuits
U.K.	√	√	×	√	√	•	•	×
U.S.A	√	√	×	√	√	•	•	×
Canada	√	√	×	√	√	•	×	×
France	√	√	×	√	√	•	×	×
Germany	√	√	×	√	√	•	×	×
Japan	√	√	•	•	•	√	×	√
Malaysia	√	√	•	•	•	•	√	√
Australia	√	√	•	√	√	•	×	×
Singapore	√	√	×	•	√	•	×	√

Table 8.6(Contd.): Potential markets and target products

Countries	Cultural/ Heritage	Wildlife	Eco Tourism	Medical	Adventure	Rural	MICE/ Business	Budhdhist/ Religious Circuits
Netherlands	√	√	×	√	×	●	×	×
Korea (South)	√	√	×	×	×	●	√	√
China	√	√	×	×	×	●	●	√
Thailand	√	●	●	×	×	●	×	√
SAARC Countries	√	√	×	●	×	×	√	√

√	High	●	Medium	×	Low

8.2.5   Estimated Targets – Assuming 10 Million Foreign Tourist arrivals in 2010

This implies we can target 6.55 Mn foreign tourists in traditional products like Cultural and Heritage Tourism and for new concepts like Medical/ SPA, MICE/ Business, Religious/ Buddhist and Fairs and Festivals, we can target approx. 3.45 Mn foreign tourist arrivals from the target nations.

New Concepts

Medical / SPA 0.6 Mn

MICE / BUSINESS 1.4 Mn

Religious / Buddhist 1.1 Mn

Fairs & Festivals 0.35 Mn

- Germany – 0.1 Mn
- U .K – 0.1 Mn
- USA – 0.2 Mn
- Mid East - 0.1 Mn
- Africa – 0.1

- Korea – 0.1 Mn
- USA – 0.6 Mn
- Canada – 0.25 Mn
- Germany – 0.25 Mn
- Singapore – 0.2 mn

- Thailand – 0.25 Mn
- Japan – 0.25 Mn
- Malaysia – 0.25Mn
- Korea – 0.25 Mn
- China – 0.1 Mn

- Canada - 0.1 Mn
- USA – 0.15 Mn
- Austr – 0.1 Mn

8.2.6   Estimated Targets – Assuming 16.9 Million Foreign Tourist arrivals

This implies we can target 8.05 Mn foreign tourists in traditional products like Cultural and Heritage Tourism and for new concepts like Medical/ SPA, MICE/ Business, Religious/ Buddhist and Fairs and Festivals, we can target approx. 8.85 Mn foreign tourist arrivals from the target nations.

New Concepts

Medical / SPA 1.61 Mn	MICE / BUSINESS 2.87 Mn	Religious / Buddhist 3.11 Mn	Fairs & Festivals 1.25 Mn
• Germ – 0.19 Mn • France – 0.19 Mn • Spain – 0.18 Mn • U .K – 0.29 Mn • Nether - 0.16 Mn • USA – 0.32 Mn • Mid East - 0.29 Mn	• Korea – 0.2 Mn • Sing – 0.37 Mn • USA – 1.0 Mn • Canada – 0.53 Mn • Austr – 0.26 Mn • Germ – 0.51 Mn	• Thailand – 0.40 Mn • Japan – 0.70 Mn • Malaysia – 0.47 Mn • Korea – 0.35 Mn • China – 0.29 Mn • USA – 0.50 Mn • France – 0.40 Mn	• Canada - 0.40 Mn • USA – 0.35 Mn • Austr – 0.5 Mn

8.2.7   Estimated Targets – Assuming 25 Million Foreign Tourist arrivals

This implies we can target 14.1 Mn foreign tourists in traditional products like Cultural and Heritage Tourism and for new concepts like Medical/ SPA, MICE/ Business, Religious/ Buddhist and Fairs and Festivals, we can target approx. 10.9 Mn foreign tourist arrivals from the target nations.

New Concepts

Medical / SPA 2.6 Mn	MICE / BUSINESS 3.4 Mn	Religious / Buddhist 3.1 Mn	Fairs & Festivals 1.8 Mn
• Germany – 0.3 Mn • France – 0.3 Mn • Spain – 0.3 Mn • U .K – 0.4 Mn • Nether - 0.2 Mn • USA – 0.5 Mn • Mid East - 0.4 Mn • Africa – 0.2	• Korea – 0.2 Mn • Singapore – 0.5 Mn • USA – 1.2 Mn • Canada – 0.6 Mn • Australia – 0.3 Mn • Germany – 0.6 Mn	• Thailand – 0.40 Mn • Japan – 0.70 Mn • Malaysia – 0.5 Mn • Korea – 0.3 Mn • China – 0.3 Mn • USA – 0.50 Mn • France – 0.40 Mn	• Canada - 0.6 Mn • USA – 0.6 Mn • Austr – 0.6 Mn

9.1. Roadmap to augment foreign tourist arrivals

Goals & Priorities	Actions/ Steps to be taken	Responsibilities
Setting up a centralised tourism repository	a. Information collation about top 50 Tourist destinations in India about the following :- √ *Tourism resources of the location* √ *Nearest port of entry and flight connectivity details (E.g:- London to Mumbai for Tourist Destination of Ajanta)* √ *Connectivity modes with point of entry (E.g. Mumbai - Ajanta)* √ *Accommodation facility – comprehensive listing of Classified Hotels and their contacts* √ *Restaurants and Cafes available and cuisines served* √ *Entertainment options available* √ *Other tourism spots nearby* √ *Visa procedures and facilitation* b. Linking the information to Incredible India website **c.** Regular review and updation of the website, flashing information in case of an emergency/ important developments	• Survey Agencies • IT Consultants selected by Ministry of Tourism • Ministry of Tourism for overall supervision • Ministry of External Affairs and Ministry of Civil Aviation to provide support
"Visa on Arrival" facility	a. Earmark 15000 sq.ft at Delhi, Mumbai, Hyderabad, Bangalore, Kolkata Airports for "Visa on Arrival" Services. (Each entry point must have at least 50 counters) b. The earmarked areas to have clean public convenience facilities, refreshment zones, entertainment options showcasing India's diverse tourism products c. Designate 100 skilled immigration officials at each port of entry for the procedure d. Update this information in the Tourism repository	• Airports Authority of India • Ministry of External Affairs

Goals & Priorities	Actions/ Steps to be taken	Responsibilities
Enhance visibility / signage within the Airport (prior to exit from the premises)	a. Demarcation of services like Radio Taxis, Prepaid Taxis, Auto, Transfer to Hotels/ Business Centres/ Cafeteria/ Shopping Arcades b. Prepaid Taxi Challans to print the registration number of the Taxis to help out the Tourists c. Pvt. developers associated with different international airports to look into the matter d. Setting up 60/80 Business Hotels with all modern amenities and facilities within the Airport premises to help Business visitors	• Airports Authority of India • Hotel Associations • Local Road Transport Organisation
Increasing Off peak Tourism activity	a. Develop/ co-ordinate a major out of season country wide festival (may be cuisines/ shopping fiestas/ festivals) annually to increase flow of tourists	• Ministry of Tourism in co-ordination with the State Tourism authorities
Developing the New Concept – Medical Tourism	a. To be promoted aggressively along with CII in countries like Germany, France, Spain, UK, Netherlands, USA, Africa, b. Initiate Corporate hospital chains – Escorts, Fortis, Apollo to tie up with travel operators and LCA by providing a package deal to the medical tourist for the entire duration of stay. c. Identify serene/ reclusive spots near Medical tourism locations – Bangalore, Hyderabad, Chennai, Trivandrum and promote the same amongst intending visitors d. MOT in association with MOHFW, organise aggressive campaign - Medical Conclave in select overseas location with help of leading practitioners – heart specialists, physiotherapists, organs transplantations, cancer specialists, kidney, ophthalmologists to promote major treatments along with 4/5 days leisure packages to nearby locations e. Promote medical tourism in the African countries like Nigeria, Zaire, Mauritius, Mozambique etc.	• CII • Pvt. Hospital Chains • Low Cost Airlines like Deccan, Spicejet, Indigo • Travel Agents

Goals & Priorities	Actions/ Steps to be taken	Responsibilities
Developing the New Concept – MICE Tourism	a. Develop the following locations and promote them as MICE Tourism hubs:- - Delhi - Jaipur - Goa - Hyderabad - Bangalore - Cochin b. ICPB to liaison with Industry Associations, Export Bodies like EPCH, PLEXCONCIL, GEMS& JEWELLERY, ELCINA to promote Trade Fairs and Exhibitions in the Target Markets c. Delegation of Industry experts and ICPB to travel to Germany, USA, Canada, Korea, Singapore, China Autralia for inviting them to India d. Invite Developers to develop world class Convention Centres with multimodal transport facility, entertainment facility, 5 star rooms, restaurants, security, shopping paradise e. Promote private participation for integrated convention centers with multi media kits & translations / interpretation facilities f. Arrange for complimentary gifts / mementoes from Ministry of Tourism. Arrange for marketing collaterals / presentations to incite awareness	• State Tourism Boards • ICPB • ITPO • Apex Bodies • Export Bodies

Goals & Priorities	Actions/ Steps to be taken	Responsibilities
Aggressively marketing identified tourism products in the identified markets – Religious/ Buddhist Tourism	a. Establish Bi-lateral ASA (speedy renewal in case of expiry) with Korea, Thailand, Japan, Malaysia, China, France and USA b. Foreign Airlines like JAL, Malaysian, Singapore, Thai Airways, should increase the monthly frequency three folds (from December to March) to Kolkata, which should be promoted as the gateway of Entry for Buddhist tourists c. Develop a special luxury tourist train starting from Calcutta trudging across Bodhgaya, Nalanda, Rajgir, Kushinagar, Sanchi, Sravasti, Sarnath. d. Develop connectivity between Varanasi and Mumbai for enabling visit to Ajanta & Ellora via Aurangabad through Low Cost Carriers e. Develop off beat destinations like Guneri, Kesaria, Lauria, Vidisha. f. Set up Govt. approved Souvenir shops, Hygienic Restaurants providing South East Asian Cuisines, Clean drinking water facilities at all locations	• Ministry of Tourism/ State Tourism Department – for promotions • Ministry of Railways – for connectivity and providing destination specific train • Local Bodies / Hotel Association, Transporation, Sanitation, Handicrafts - for providing resources
Developing and maintaining a Tourism Repository	a. Developing a repository of tourism information b. Provide and promote an Incredible India information service to potential visitors through a call centre including facility to make bookings and order support literature	• Ministry of Tourism to take a call, to outsource database designing and maintenance

Goals & Priorities	Actions/ Steps to be taken	Responsibilities
Ensuring Accommodation meets market demand	a. Providing accurate up to date information on market demand/ supply of accommodation in the country for specific sites of key products like Medical, MICE, Wildlife, Adventure b. Encouraging FHRAI to set up an online booking system c. Encourage unclassified/ approved hotels to set up self regulatory organisation	• Ministry of Tourism
Enhancing the internal infrastructure	a. Improving quality of roads, national as well as State Highways linking airports & rail heads to important tourist destinations b. Luxury Trains to trudge across important heritage locations c. Introduction of Bharat Darshan Trains – a semi premium category to link important locations	• NHAI, Ministry of Road Transport, State PWD's • Ministry of Railways • State Tourism Departments
Ensuring high quality of service amongst all stakeholders	a. Motivating stakeholders to promote a positive, quality image of India b. Encourage higher standards of customer care and welcome c. Encourage stakeholders to adopt harmonized quality standard norm	• Ministry of Tourism • International Certification Agencies
Pay requisite attention to Domestic Tourism as well	a. Implement special incentive programme for the domestic tourists in the off season	• State Tourism Authorities • Ministry of Tourism
Developing Human Resource in Travel and Tourism	a. Encourage premier institutes to incorporate courses on Tourism at the Post graduate level b. Special programmes to be initiated for Training/ Skill upgradation of existing professionals	• Ministry of Tourism • AICTE, Min. of HRD • Educational Institutes

Goals & Priorities	Actions/ Steps to be taken	Responsibilities
Involve Community participation	a. Consult local communities on significant tourism issues b. A consultative forum to be established to provide intelligence and inform future strategies	• State Tourism Authorities
Conceptualize new products like "Tribal Tourism" wherein India has a stronghold	a. Identification of circuits that can be promoted b. Identification of target overseas markets – most likely markets are Western European and Americas c. Developing connectivity with major railheads and airports d. Developing infrastructure at the nearest location	• Ministry of Tourism/ State Tourism Departments in consultation with leading consultancy organisations
Review the worldwide trends at regular intervals and implement new concepts	a. Get vivid idea about the new tourism products b. Undertaking a SWOT/ Strategic analysis based on Tourism resources at the overall level c. Undertaking a 2nd level SWOT analysis based on identified destinations based on d. Carrying out a feasibility of the locations	• Consultancy Organisation under the aegis of Ministry of Tourism
Setting up "Paryatan Bhawan" at the Gateway of Entry	a. To set up a "One Window Outlet" for providing better service to foreign tourists	• State Tourism Departments, Airlines, Leading Hotel Chains, State Tourism Offices, Travel Agents

Short Term (To achieve 10 Mn by 2010)	Long Term (To achieve 25 Mn by 2015)
Setting up a centralised tourism repository covering top 50 destinations	Setting up a centralised tourism repository covering top 100-125 destinations
Initiate "Visa on Arrival" at Delhi, Mumbai, Hyderabad, Bangalore, Kolkata Airports.	Ensuring Accommodation meets market demand
Enhance visibility / signage within the Airport (prior to exit from the premises)	Ensuring 150000 professionally qualified tourism professionals are available by the year 2012
Modernize airstrips/ airports like Jaipur, Agra, Varanasi, Gaya, Bhubaneshwar, Guwahati, Calicut, Hassan to enable direct connectivity with source markets with specified products. Increase passenger handling capacity with necessary infrastructure like passenger terminal, parking bay, improved check in counters and luggage handling systems	ICPB + Industry Experts to market India overseas and promote the destination as MICE hub of South Asia
State Govt. to promote specific products highlighted in the Action Plan like Medical, Buddhist, MICE, Fairs & Festivals and prepare a comprehensive package with leading Hotels, Agents and Low Cost Airlines	Initiate / Tie up with leading Hospital Chains and State Governments along with the Stakeholders and arrange for a Medical Conclave in the Source Market wherein the Indian Medical Expertise can be showcased
Involve the different Governing Bodies/ Ministries and delegate responsibilities with the PMO for regular updation and status reporting	Research and find acceptability of new / emerging concepts and find out whether it would be feasible in India
Night Entertainment – Increase timings of Pubs and Bars at important tourist locations	
Start huge "Duty Free" Shopping Arenas at Delhi, Kolkata, Mumbai, Bangalore, Hyderabad Airports	

The vision/ optimistic scenario can be achieved if:-

- *Ministry fo Home Affairs, Directorate General of Civil Aviation, Ministry of Finance, Ministry of Surface Transport, Railways should be under the direct chairmanship & co-ordination of PMO, so that prompt and immediate action can be takento resolve issues*

- *Lastly and most mportantly, **Tourism Policy 2002 should be reviewed** in line with the focus given on Tourism industry and its contribution in the overall GDP*

Chapter Ten
An Overview of the Tourism Circuits/ Destinations

10.1. Overview

The Chapter takes stock of current situation in the earmarked tourism circuits/ destinations in terms of its primary and secondary resource bases, services as well as facilities offered to the tourists by it.

10.2. Agra – Fatehpur Sikri – Mathura – Vrindavan Circuit

The Agra-Fatehpur Sikri-Mathura-Vrindavan circuit is in the state of Uttar Pradesh. Agra is one of the most sought after tourist destinations both by domestic and foreign travelers. It is the city of the Taj Mahal which is considered one of the seven wonders of the modern world and is a UNESCO world heritage site. Mathura and Vrindavan are important places of pilgrimage for Hindus worldwide.

Fig.10.1: Taj Mahal, Agra
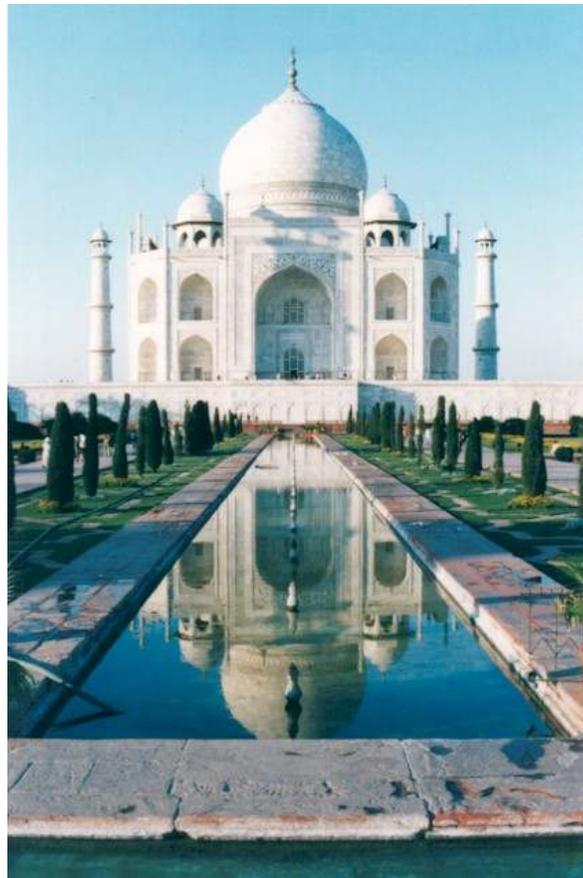
10.2.1.   Primary Resource Base
10.2.1.1.   Natural Environment

The circuit is in the state of Uttar Pradesh and the destinations are generally located in a plain terrain. The city of Agra is a part of the great northern plains and is situated on the banks of the river Yamuna. Mathura is situated on the west bank of river yamuna, around 56 kms from Agra. Vrindavan is located around 15 kms from Mathura and is located on a plain terrain.

10.2.1.2.   Culture & Heritage

Agra is famous for its Mughal heritage. It has a number of monuments (most notably the Taj Mahal) which attract tourists. Fatepur Sikri is an ancient city set up by the Mughal emperor Akbar near Agra and is one of the finest examples of Mughal architectural splendor at its height. Mathura and Vrindavan are the important pilgrimage centers for Hindus. They are famous for their distinct "braj culture" and are associated with Lord Krishna.

10.2.1.3.   Towns & Villages

Agra, Mathura and Vrindavan are the major towns in the circuit. Agra city is also the administrative capital for the Agra district.

10.2.1.4.   Outdoor Activity

The circuit offers extensive sightseeing options for culture and history aficionados with its multitude of historical monuments and temples.

10.2.2.   Secondary Resource Base

10.2.2.1.   Festivals/ Events

The circuit has a rich cultural heritage and a number of festivals and fairs are celebrated at the various destinations of the circuit. The major festivals and events in Agra and Fatehpur Sikri are:

- Kailash Fair - It is a major fair celebrated in honor of Lord Shiva who is believed to have appeared here in the form of a stone lingam. It is held at Kailash, which is around 12 km from the city in the months of August or September.
- Sheetla Fair - It is held near Delhi Gate in the months of July and August.
- Urs (held at Fatehpur Sikri) - This fair is organized at Sheikh Salim Chishti's Dargah, during the month of Ramzan.
- Taj Mahotsav - A festival of art, craft, culture and celebrations. Organized by U.P. Tourism, it is held every year, between 18th to 27th February.

The main festival celebrated in Mathura and Vrindavan is Holi which is celebrated in February-March for seven days.

Fig.10.2: Holi celebrations in Mathura
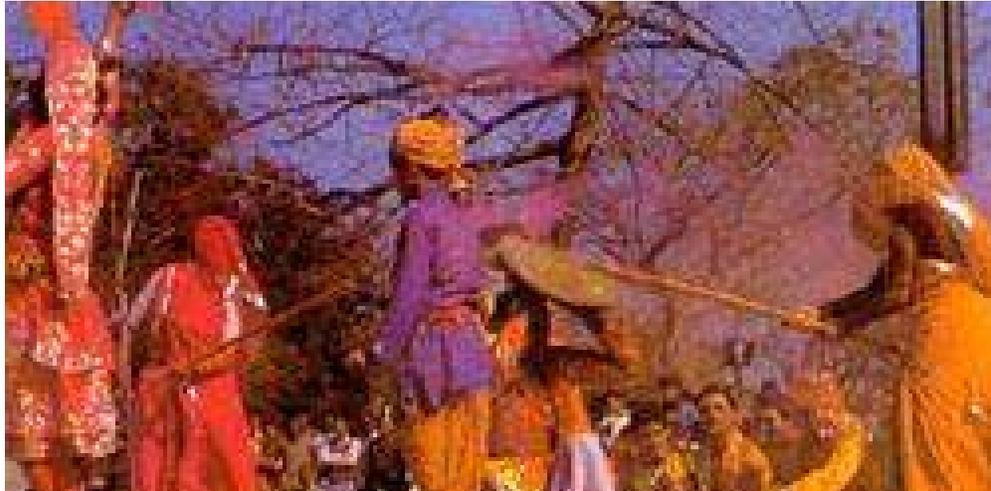
10.2.2.2. Shopping

Agra is known for its fabulous handicrafts, made of marble and soft stone inlay work. Agra's major handicraft products besides inlay work are: leather ware, brassware, carpets, jewellery and embroidery work. Agra is also well known for its sweets. The main shopping areas of the city are Sadar Bazar, Kinari Bazar, Raja-ki-Mandi, Sanjay Place and the Taj Mahal Complex. There are a number of government emporia and souvenir shops besides privately owned shops. Shopping specialties in Mathura and Vrindavan include marble & alabaster products, glass beads, and milk based sweets. Some other shopping options are - textiles, silver ornaments and handicrafts.

10.2.2.3. Entertainment

The major avenues of entertainment in the circuit are the festivals and fairs. Certain recreation facilities (such as golf, swimming, etc.) are available at starred hotels in Agra.

10.2.2.4. Visitor Attractions

The main attractions of the circuit are the monuments and temples. The main attractions in Agra are:

- **Taj Mahal** - The Taj Mahal is considered the finest example of Mughal architecture, a style that combines elements of Indian, Islamic and Persian architectures. It is considered one of the wonders of modern world and is visited by travellers from world over.
- **Agra Fort** - This great monument of red sandstone dominating a bend in the river Yamuna, 2km northwest of Taj Mahal was constructed by the Mughals during 1565-1571. The fort is crescent shaped, flattened on the east with a long, nearly straight wall facing the river. The fort contains splendid mosques and palaces in red sandstone and white marble built by two generations of creative builders during the time of Akbar and later Jehangir and Shahjahan

Fig.10.3: Agra Fort, Agra
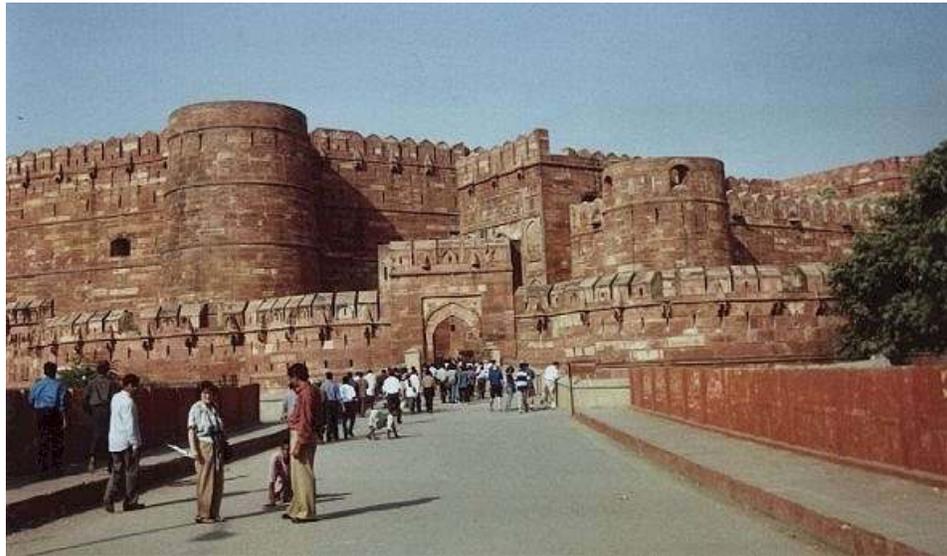
- **Sikandra (Akbar's Tomb)** - Akbar's tomb is a medley of architectural styles and is one of the prominent historical monuments in Agra.

The main attractions in Fatehpur Sikri are - The ancient city complex built by Akbar is the main attraction, however some important places of interest within the complex are Diwan-I-Am, Diwan-khana-I-khaas, Turkish Sultana's House, .The Treasury, Daulat khana-I-khas, Palace of Jodha Bai, Hawa Mahal And Nagina Masjid, Birbal's Palace, Sunehra Makan, Panch Mahal, Dargah Of Sheikh Salim Chisti, The Jami Masjid and Buland Darwaza

Fig.10.4: Fatehpur Sikri, Agra

The main attractions in Mathura are:

- **Shri Krishna Janma Bhumi** - The Birth Place of Lord Krishna, it is one of the most important sites for pilgrims.
- **Jama Masjid** - Built by Abo-in Nabir-Khan in 1661.A.D. the mosque has 4 lofty minarets, with bright colored plaster mosaic of which a few panels currently exist.
- **Vishram Ghat** - The sacred spot where Lord Krishna is believed to have rested after slaying the tyrant Kansa.
- **Dwarkadheesh Temple** - Built in 1814, it is the main temple in the town. During the festive days of Holi, Janmashthami and Diwali, it is decorated on a grandiose scale.
- **Gita Mandir** - Situated on the city outskirts, the temple carving and painting are a major attraction.
- **Government Museum** - Located at Dampier Park, it has one of the finest collection of artifacts of archaeological interest. Rare items from the Gupta and Kushan period (400 B.C.-1200A.D.) are on display.

The main attractions in Vrindavan are:

- **Govinda Dev Temple** - Built by Raja Man Singh of Jaipur in 1590, the temple is a testimony of the architectural splendor of medieval India.
- **Shahji Temple** - It was constructed in the year 1860. It is a prominent temple of northern India. It is famous for its splendid art architecture, sculpture and twelve single piece spiral columns made up of marble approx 15'high.
- **Rang Ji Temple** - Vrindavan's longest temple, it was constructed in 1851 by Seth Govind Das ji & Seth Laxmi Chand Ji.
- **Madan Mohan Temple** - Situated near Kali ghat, it is believed to have been built by Kapur Ram Das of Multan;it is one of the important temples in Vrindavan.

Fig.10.5: Madan Mohan Temple, Vrindavan
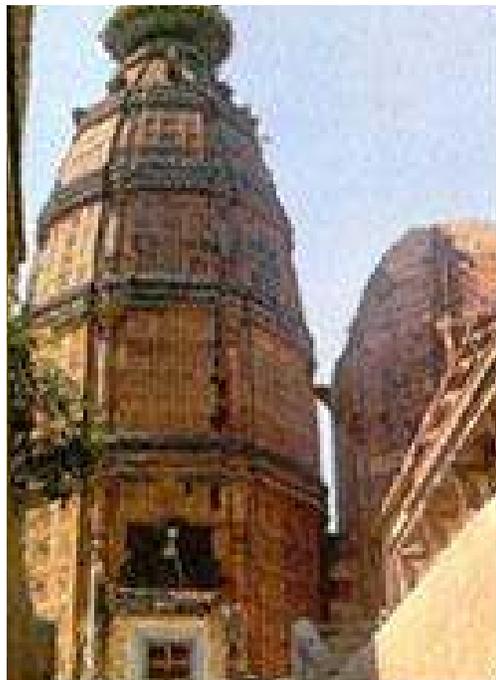
- **Krishna Balaram Mandir (ISCKON Temple)** - It is an International spiritual organization having 400 centers around the world. This was founded by Srila A.C. Bhakti Vedanta Swami Prabhupada.
- **Radha Ballabh Temple** - Built in 1626 this temple is of special architectural interest as remnant of ancient Hindu architecture. The Shrine was demolished in the 17th century and only the plinth of the huge structure remains.
- **Gopi Nath Temple** - Closely resembling the Madan Mohan mandir in style and dimension, it was built by Rai Shilji, a Sekhavat Rajput of Jaipur
- **Glass Temple** – The glass temple's marvelous art of glass work dazzles the pilgrim's eyes.
- **Nidhi Van** - Radhika's Kridasthali, the playground of Krishna's consort, it is a place of Hindu veneration.

10.2.3.   Tourist Services & Facilities

10.2.3.1.   Physical Infrastructure – Rail – Road – Air Connectivity

Agra is connected to Delhi by the railway line. Many trains connect Delhi and Agra, including luxury trains such as the Palace on Wheels. The Station is known as Agra Cantonment Station. Road connectivity to Agra from major cities exists via national highways. No direct air connectivity is available currently, nearest airport is Delhi.

10.2.3.2.   Accommodation facilities

The major avenues of entertainment in the circuit are the festivals and fairs. Certain recreation facilities (such as golf, swimming, etc.) are available at starred hotels in Agra.

10.2.3.3.   Accessibility/ Transport mode

The UPSRTC operates city buses to and from the main archaeological sites in Agra Moreover, air conditioned/non air-conditioned taxis are available, without meter, at the railway stations, airport, and hotels. Mathura and Vrindavan are accessible via public bus services and private taxis.

10.2.3.4.   Services/ Facilities

The website of the Uttar Pradesh state tourism department has comprehensive information on the destinations. In addition, there are tourist offices at Agra and Varanasi which provide assistance and useful information to travelers.

10.3. Ajmer

Ajmer is a popular pilgrimage center for the Hindus as well as Muslims. The landmark of Ajmer is the Dargah Khwaja Sahib; it is revered by all the sects and is one of the holiest Muslim shrines in the country.

Fig. 10.6: Dargah of Khwaja Muinuddin Hasan Chishti
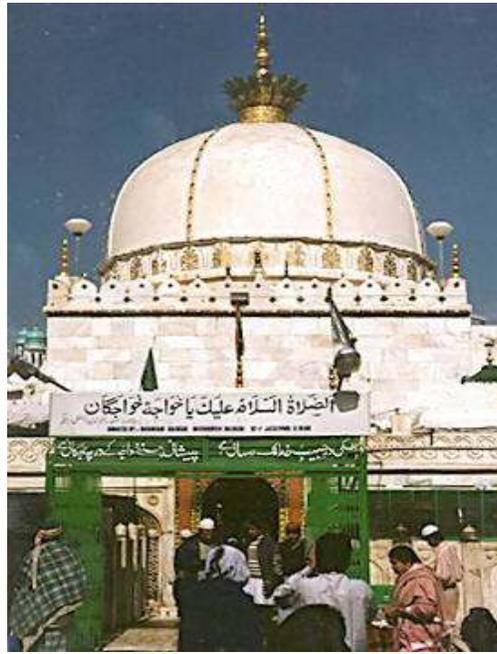
10.3.1.   Primary Resource Base

10.3.1.1.   Natural Environment

The city of Ajmer lies around 130 km west of Jaipur, it is an oasis surrounded by the rocky aravalli hills.

10.3.1.2.   Culture & Heritage

As a result of its being ruled by both Hindu and Muslim rulers over the centuries, the city has a distinct culture which is an amalgamation of Hindu and Islamic heritage. The city was founded by Raja Ajay Pal Chauhan in the 7th Century A.D. and since then has been home to many dynasties. The Chauhans dominated till the end of the 12th century; subsequently it was seized by Rana Kumbha of Mewar and then came the Muslim rulers of Malwa. The city today has both a significant Hindu and Muslim population.

10.3.1.3.   **Towns & Villages**

The city of Ajmer is the headquarters of Ajmer district, having a population of around 4, 85,197 (as per 2001 census).

10.3.1.4.   **Outdoor Activity**

The destination is mainly famous for association with Islam and Hinduism. The outdoor activity options are limited to sightseeing.

10.3.2.   **Secondary Resource Base**

10.3.2.1.   **Festivals/ Events**

The major festival/fair in Ajmer is the Urs Fair. The Puskhar Camel Fair is held annually near Puskhar Lake which is around 11 Km from Ajmer.

Fig. 10.7: Urs Fair, Ajmer

10.3.2.2.   **Shopping**

Shopping options in Ajmer include antiques, curios, gold and silver jewelry in contemporary designs, colorful tie-and-dye saris and embroidered jodhpuri 'Jutis'. Especially during the annual Urs fair, a range of creations of traditional folk artisans are for sale.

10.3.2.3.   **Entertainment**

The major avenues of entertainment are the festivals and fairs.

10.3.2.4.   **Visitor Attractions**

The main attractions in Ajmer are:

- **Dargah of Khwaja Muinuddin Hasan Chishti** - At the foot of a barren hill, is situated the tomb of the Sufi saint Khawaja Moinuddin Chisti more popularly known as Khawaja Saheb or Khawaja Sharif. The shrine is next only to Mecca or Medina for the Muslims of south Asia.

- **Shahjahan's Mosque** - In the corner of the inner court of the Dargah of Khwaja Muinuddin Chisti, is a magnificent building in white marble with a long (30.5m) and narrow court having low arcade and delicate carvings with trellis-work. It is the most marvelous of all the sanctums within the sanctuary of the Dargah.
- **Adhai-din-ka-Jhonpra (Mosque)** - This is a masterpiece of Indo-Islamic architecture located on the outskirts, of the city, just beyond the Dargah. It was originally a Sanskrit college, built within a temple. In 1193 A.D. Mohhamed Ghauri conquered Ajmer and converted the building into a mosque by adding a seven arched wall in front of the pillared hall in just two-and-half days (adhai-din) and hence the name.

Fig. 10.8: Adhai din ka Jhonpra

- **Taragarh Fort** - Taragarh Fort was built on a hilltop by Ajaipal Chauhan, the founder of the city in the 7th century and is about 3 km from the city of Ajmer. A steep climb up rewards the weary visitor with an amazing bird's eye view of Ajmer.

Fig.10.9: Taragarh Fort, Ajmer
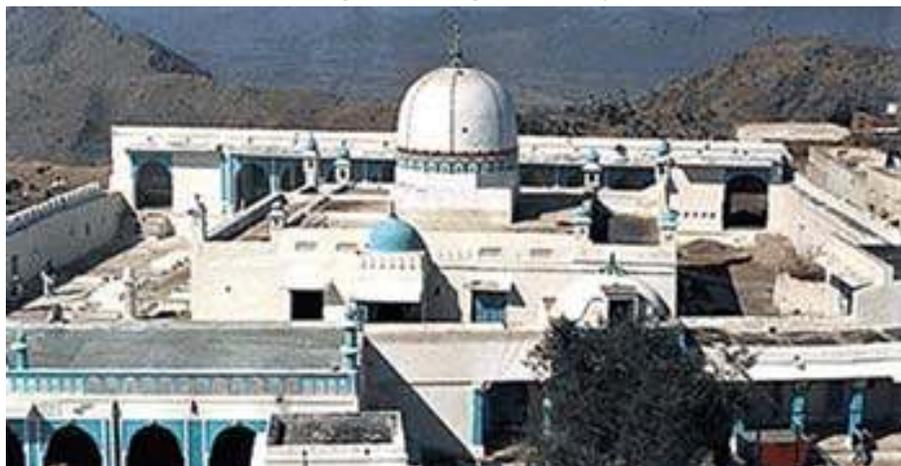
- **Ana Sagar –** It is an artificial lake named after Anaji Chauhan and provides beautiful views of the city.

- **Nasiyan Temple –** It is a Jain temple and is richly adorned by glass mosaic, precious stones and silver. It is popular with tourists for its jain architecture.
- **Prithvi Raj Chauhan Smarak –** It is located half way up the drive to Taragarh Fort and provides beautiful views of sunset. It is popular with local people for its views.
- **Mayo College –** It was established in 1875, for the ruling elite and was named after Lord Mayo, the then Governor General of India. Today it is one of the premiere educational institutional of India, and open to everybody. It has a museum displaying historical objects of interest and biological preservation.

Fig. 10.10: Mayo College, Ajmer

10.3.3.   Tourist Services & Facilities
10.3.3.1.   Physical Infrastructure – Rail – Road – Air Connectivity

Ajmer lacks direct air connectivity; Jaipur (132 km) is the nearest airport. Ajmer has a railway station and regular train services link Ajmer with important cities. The city is connected by road with major cities of the state.

10.3.3.2.   Accommodation facilities

The accommodation facilities available include starred hotels, unclassified hotels and guest houses. The town has in totality 139 Accommodation units, with 2016 rooms and 3889 beds as per a census of the accommodation units carried out by ACNielsen ORG-MARG in the city for incorporation of findings under the study "Collection of Domestic Tourism Statistics for the State of Rajasthan" commissioned by the Ministry of Tourism.

10.3.3.3.   Accessibility/ Transport mode

The main connectivity mode to the destination is via road and rail. Bus services operate within the city and commercial taxis / autos are also available for hire for local sightseeing.

10.3.3.4.   Services/ Facilities

The state tourism website lists some useful information on the city. There is tourist reception center in the city which provides government approved guides to the tourists, also there is tourist information centre at the city railway station which provides useful information to the tourists.

10.3.4.   The Badami-Halebid-Aihole Circuit – An overview

The circuit is located in Karnataka and is known for ancient monuments, temples and structures. The destinations are historically and archaeologically important places in southern India, having been centers of ancient Chalukya and Hoysala Empires.

Fig10.11: Ancient caves at Badami
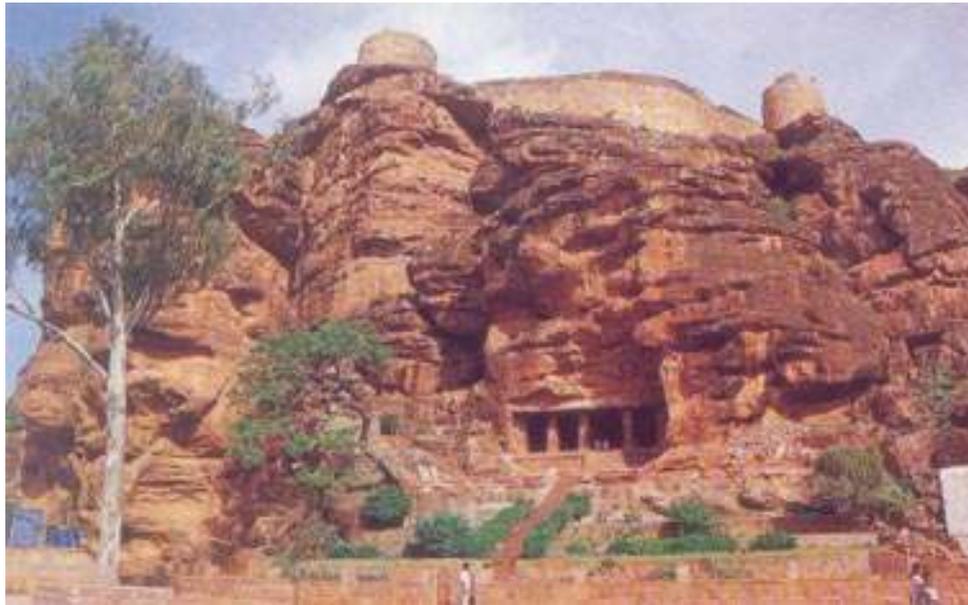
10.3.4.1.   Primary Resource Base

10.3.4.1.1.   Natural Environment

Badami is picturesquely situated at the mouth of a ravine between two rocky hills. Aihole is situated near Badami and has a rocky landscape. Halebid is situated in a plain terrain.

10.3.4.1.2.   Culture & Heritage

The destinations in the circuit are historically significant for being the centres of Chalukya and Hoysala empires. The Chalukyas ruled over large parts of southern and central India between 6th and the 12th century C.E. while the the Hoysala Empire at their peak ruled large parts of southern India from about 1000 to 1346 and is remembered today primarily for its architecture. Badami was the regal capital of the early Chalukyas and is famous for its four cave temples - all hewn out of sand stone on the precipice of a hill which were sculpted between the 6th-8th centuries AD. Aihole was the first capital of the early Chalukyas and is famous for its ancient temples dating back to the 5th century CE; the destination is called as the "cradle of Hindu rock architecture". Halebid was the 12th-century capital of the Hoysalas ,it has a number of temples which are one of the greatest examples of Hoysala architecture.

10.3.4.1.3.   Towns & Villages

The destinations in the circuit are small towns and villages. Badami is located in the Bagalkot district, Aihole is a small village near to Badami and Halebid is a small town in Hassan district.

10.3.4.1.4.   Outdoor Activity

The circuit is famous for its ancient monuments and the outdoor activity options are limited to sightseeing.

10.3.4.2.   Secondary Resource Base

10.3.4.2.1.   Festivals/ Events

The main festival celebrated in the circuit is the Banashankari Devi fair held near Badami. It is an annual fair held in the month of January on the full moon day. This fair lasts for 10 to 12 days.

Fig10.12: Banashankari Devi Temple, the venue of Banashankari Devi Fair

10.3.4.2.2.   Shopping

The shopping options are limited in the circuit. The shopping options in Badami mostly revolve around handicrafts and rugs found in the local market. Shopping options are lacking in Aihole and Halebid.

10.3.4.2.3.   Entertainment

The entertainment options are lacking in the circuit.

10.3.4.2.4.   Visitor Attractions

The circuit is famous for its ancient monuments and temples of archaeological prominence. The main attractions in Badami are ancient cave temples which date back to the 6th century. These cave temples display the secular nature of the rulers then, with tolerance and a religious following that inclines towards Hinduism, Buddhism and Jainism. The prminent temples are the Cave Temples 1,2,3 and 4; caves 2 & 3 are dedicated to Vishnu, whereas cave 1 is devoted to Shiva, and cave 4 displays reliefs of Jain Tirthankaras. From an architectural and archaeological perspective, they provide critical evidence of the early styles and stages of the southern Indian architecture.The other places of interest in the town are Archaeological Museum and Buddhist temple.

Fig10.13: Cave Temple 2 dedicated to Vishnu, Badami

Aihole has 125 or more temples. All have exquisite, intricate carvings that were done between the 5th and 8th centuries. A few notable ones are: Lad Khan Temple, Durga (Fort) Temple, Uma Maheshwari Temple, Hutchimalli Temple, Buddhist Temple, Jain Meguthi Temple, Konthi Temple Complex and Ravalphadi Caves. Apart from temples there is an ancient fort dating back to the 6th century A.D. There is also an Archaeological Museum and Art Gallery.

Fig10.14: Durga Temple, Aihole

The main attractions in Halebid are the ancient temples. The major temples of this town are Hoysaleswara temple, Kedareshwara temple, Jain Mandira, Sri Ranganatha temple. There is also an Archaeological Museum in the town.

Fig.10.15: Hoysaleswara Temple, Halebid

10.3.5.   Tourist Services & Facilities
10.3.5.1.1.   Physical Infrastructure – Rail – Road – Air Connectivity
The circuit has limited connectivity. There is no direct air connectivity to any of the destinations in the circuit. The nearest airport for Badami is at Belgaum (150 km). Badami has a railway station and is on the Hubli-Sholapur rail route; the town is connected by road to: Hubli and Bijapur. The nearest railway station for Aihole is Badami and it is connected by road from Pattadakal (17 kms) · Badami (46 kms) · Bangalore (483 kms). Halebid is connected by road and rail to Bangalore, Mysore and Mangalore.

10.3.5.1.2.   Accommodation facilities
There are a number of accommodation facilities available at Badami which include 1 luxury hotel and a number of unclassified hotels and guest houses. The main accommodation facilities available at Aihole are the government and private tourist rest houses. The accommodation facilities are limited at Halebid with only one government tourist bungalow.

10.3.5.1.3.   Accessibility/ Transport mode
Aihole is accessible from Badami by road and there are bus services available. Private vehicles are also available for hire. Intercity KSTDC buses are available for visiting Halebid from Bangalore. Private vehicles are also available for hire.

10.3.5.1.4.   Services/ Facilities
The state tourism website lists general information about the three destinations.

10.3.6. The Bodhgaya-Nalanda-Rajgir circuit

The Circuit is famous due to its association with Buddhism. All the three destinations in the circuit are important places of pilgrimage for Buddhists around the world and are located in the state of Bihar.

Fig 10.16: View of Bodhgaya Temple

10.3.6.1. Primary Resource Base

10.3.6.1.1. Natural Environment

The destinations are located in a generally plain terrain. However, there are rocky outcrops in Nalanda and Rajgir.

10.3.6.1.2. Culture & Heritage

The destinations in the circuit have a rich heritage, having been important centers of ancient Indian civilization. Bodhgaya is famous as the place where Buddha attained enlightenment; it is the religious centre of Buddhists worldwide. Nalanda was a Buddhist center of learning from the 5th century CE to the 12th century and is famous for its world renowned ancient university; it has a number of historical monuments and structures belonging to 5th-12th centuries. Rajgir is an important place of pilgrimage for buddhists, jains and hindus; it has a number of ancient monasteries and monuments.

Fig 10.17: Ruins of ancient university at Nalanda
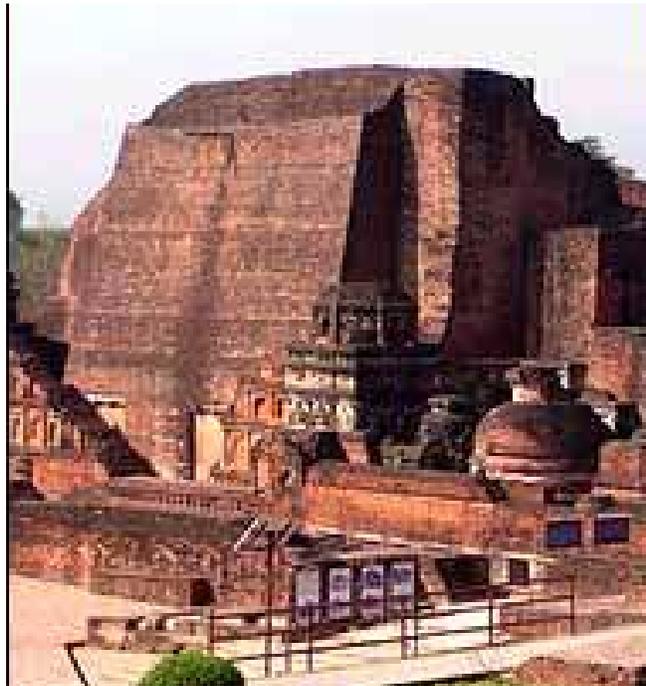
10.3.6.1.3.   Towns & Villages

The destinations in the circuit are towns with very small native population. However, owing to their importance as pilgrimage sites, there is significant number of floating population in these towns.

10.3.6.1.4.   Outdoor Activity

The destinations are mainly famous for association with Buddhism. The outdoor activity options are limited to sightseeing.

10.3.6.2.   Secondary Resource Base

10.3.6.2.1.   Festivals/ Events

There are a number of festivals celebrated in the circuit. The details of festivals celebrated are:

Fairs and Festivals in Bodhgaya:

- Buddha Jayanti Festival-The Budha Jayanti festival in May, celebrates the appearance day of Buddha, the day he got enlightenment, and the day he left his body.

Fairs and Festivals in Rajgir

- Malamasa Mela - Rajgir celebrates the Malamasa Mela when a fair is held here every three years.
- Makar Sankranti - Another festival specific to Rajgir is the Makar Sankranti Mela, held on the last of the lunar calendar month "Paus", around middle of January. Devotees make flower offering to the deities of the temples at the Hot Springs and bathe in the holy water.
- Rajgir Dance Festival - Department of Tourism, Bihar organizes every year, this colorful festival of classical and folk dances at Rajgir from Oct. 24 to 26

10.3.6.2.2.   **Shopping**

Shopping is not the highpoint of visit to Bodhgaya, which is a spiritual city. However the small town of Bodhgaya has many shops, which display decorative items, associated with Buddhism. Also available are a wide choice of statues of Buddha made of metals and sandalwood. There is not much for shopping in Nalanda. There is not any local specialty of crafts or shopping centers in the little village of Nalanda. There is not much for shopping in Rajgir.

10.3.6.2.3.   **Entertainment**

The main sources of entertainment are the different fairs and festivals held at various times of the year.

10.3.6.2.4.   **Visitor Attractions**

The major visitor attractions in the circuit are the various ancient temples and monuments of Buddhist and Hindu heritage. The major attractions in Bodhgaya are:

- **Mahabodhi Temple** - The Mahabodhi Temble is located at the place of Lord Buddha's enlightenment. The temple has a 50m (170 ft) tower. It is one of the chief attractions for pilgrims' visiting Bodhgaya.
- **Bodhi Tree** - The Bodhi tree here is said to be a descendent of the tree under which Budhha attained enlightenment. The tree is revered by Buddhists worldwide and its saplings are in great demand by devotees.

Fig 10.18: The Bodhi Tree at the Mahabodhi temple
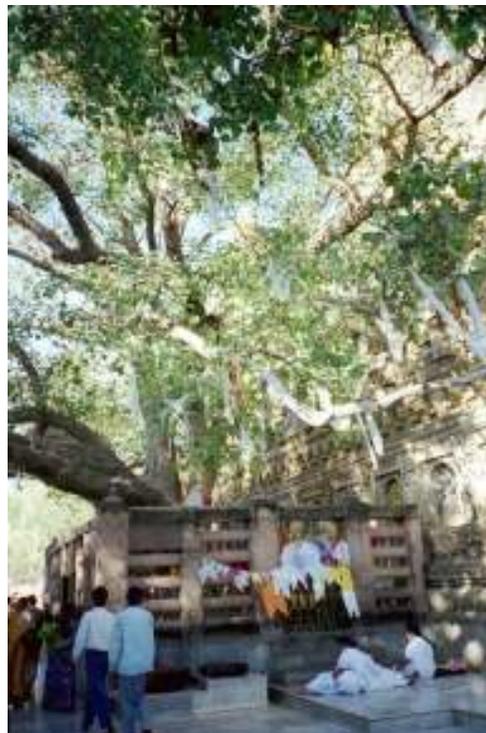
- **Vajrasana** - This marks the sacred spot of the Buddha's meditative perambulations during the third week after pious enlightenment. It is a place of veneration for devotees.

- **Mohanta's Monastery** - The Mohanta's Monastery, located right next to the Mahabodhi Temple, is a Shaivite monastery. Sankaracharya spent days here in a heated debate with buddhist philosophers. It is visited by both Hindu and Buddhist pilgrims owing to its religious significance.
- **Tibetian Monastery** - The Tibetan Mahayana Monastery is famous for its large Dharma Chakra, or wheel of law, which is a 10m high metal drum painted red and gold.

The major attractions in Nalanda are:
- **Nalanda University** -Established in the 5th century B.C., Nalanda is recorded as the world's earliest university. Buddha is believed to have visited Nalanda a number of times. Nalanda today is in ruins but still it imparts the scholarly look. The archaeological zone here is classified into a number of sites that include 11 monasteries and several temples built in red bricks.
- **Surajpur Baragaon** - The Lake with its temple to Surya, the Sun god, is a pilgrim destination twice a year in 'Vaishakha' (April-May) and in "Kartika" (October-November), during the Chhath Puja or sun Worship.

The major attractions in Rajgir are:
- **Griddhakuta or Vulture's Peak** - This was the place where the Lord Buddha set in motion his second wheel of law and for three months every year during the rainy season, it is visited by pilgrims from world over.
- **Hot Springs** – The natural hot springs are popular with tourists for their supposedly healing properties.
- **Pippala Cave** - Above the hot springs on the Vaibhava Hill, is a rectangular stone sculpted by the forces of nature which appears to have been used as a Watch tower. Venuvana- Site of the monastery Venuvana Vihar built by King Bimbisara for Lord Buddha to reside.

Fig10.19: Ancient Fortification at Rajgir

Other places of interest in Rajgir are the Karnada Tank where Lord Buddha used to bathe, the Maniyar Math that dates from the 1st century AD, the Maraka Kushi where the still unborn Ajatshatru was cursed as a patricide, the Rannbhumi where Bhima and Jarasandha fought one of the Mahabharat battles. The Chariot Route and shell inscriptions from the 1st to the 5th centuries AD, are engraved in the rock around the chariot marks at Rannbhumi.

10.3.6.3.   **Tourist Services & Facilities**

10.3.6.3.1.   **Physical Infrastructure – Rail – Road – Air Connectivity**

The connectivity to the circuit is limited; there is no direct air connectivity to any of the destinations in the circuit and rail connectivity is also limited. The main link to these destinations is via road. Bodhgaya does not have direct air connectivity, nearest airport is at Patna (112 Km).The nearest rail head for the destination is Gaya (16 km.).Bodhgaya is connected by road to Gaya. (16 km) and Patna which is 105 km. (via Jahanabad) or 181 km via Raigir. Nalanda does not have direct air connectivity, nearest airport is at Patna (90 Km).The nearest railhead to Nalanda is Bakhtiyarpur, only 38Kms away from Nalanda. It falls on the Delhi-Howrah (Kolkata) main line. Several important trains connect this railway station to several major places in India. Nalanda is accessible by road from Patna. Rajgir does not have direct air connectivity, nearest airport at Gaya. Rajgir has a railway station of its own, which is linked to Gaya. Several important trains from all parts of the country in turn service Gaya. Road network connects Rajgir to Patna (102km), Nalanda (12 km) and Gaya (34km)

10.3.6.3.2.   **Accommodation facilities**

There are a wide range of accommodation facilities available in Bodhgaya which include private hotels, guest houses and rest houses. The main accommodation facilities in Rajgir are the BSTDC hotels/private and unclassified hotels and dharmashalas. No accommodation facilities available in Nalanda.

10.3.6.3.3.   **Accessibility/ Transport mode**

The main connectivity mode to the destinations within the circuit is via road. There are private bus services connecting the destinations, however, the most convenient transport mode to visit the destinations are privately hired vehicles.

10.3.6.3.4.   **Services/ Facilities**

The state tourism department contains general information about the destinations for the tourists. There are tourist information centers at Bodhgaya and Rajgir .The state tourism development Corporation also provides Tourist Coach and Taxis for local Site seeing as well as outstation sites for the tourists.

10.3.7.   Delhi

Delhi is the administrative capital of India and is one of major tourist attractions of the country. People from all across the country live and work here which has bestowed the city with a distinct cosmopolitan culture.

Fig. 10.20: India Gate, New Delhi

10.3.7.1.   Primary Resource Base

10.3.7.1.1.   Natural Environment

The city is predominantly urbanized. However, in the western side of the city, runs the ridge which is an extension of the ancient Aravali hills. The Ridge today is an important lung of metropolitan Delhi and has been developed as a Reserve Forest.

10.3.7.1.2.   Culture & Heritage

Delhi has the most vibrant history among prominent cities or towns of India. Delhi was the capital of several empires in ancient India and has over 60,000 recognized monuments built over several millennia. It is the administrative capital of the country.

10.3.7.1.3.   Towns & Villages

Delhi is predominantly an urban area; however there are a number of villages on the fringe areas. Moreover, there are so called "urban villages" which are phenomenon of urban agglomeration.

10.3.7.1.4.   Outdoor Activity

The outdoor activity options in the city are predominantly urban. The city has wide range of facilities for sport enthusiasts. There are a number of stadiums and sport complexes. Moreover, DTTDC organizes special packages at various times of the year for various outdoor activities in and around Delhi.

10.3.7.2.   Secondary Resource Base

10.3.7.2.1.   Festivals/ Events

All the major religious festivals are celebrated in Delhi. Also, Republic Day Parade and Independence Day celebrations are held on a large scale. There are a number of art galleries and theaters where events are organized regularly. One of the major upcoming events in Delhi is the Commonwealth Games (to be held in 2010).

Fig 10.21: Presidential Guards at Republic Day Parade

10.3.7.2.2.   Shopping

Delhi has a wide variety of shopping options. There are a number of shopping areas in the city. The major shopping areas in the city are:

- City Centre (Connaught Place) - Recently renamed Rajiv Chowk,'CP' was intended to be the shopping arcade of the 'new' capital of Lutyen's Delhi in the mid 1930's, and is located right in the heart of Delhi. The place offers a wide variety of shopping options for tourists including all manner of craft items, handicrafts, curios, ethnic wear, kohlapuri chappals, Rajasthani paintings and brassware. Moreover, there is Govt. run Central Cottage Industries Emporium having wide and rare collection of Indian artifacts from different corners of the country.

Fig.10.22: Connaught Place, New Delhi

- Baba Kharak Singh Marg – It has a number of government run emporiums which sell handicrafts, handlooms, woolens, even shoes or sandals and arts of every state in India.
- Karol Bagh- It is one of the famous retail markets of Delhi. Having the products for household and also for the whole family
- Chandni Chowk - One of the main markets of Delhi, the place is very crowded and congested. Chandni Chowk is located opposite the Red Fort.
- Ansal Plaza – It is one of the first shopping malls in Delhi and offers a one stop shop for the shoppers.
- South Extension –High quality garments and footwear are the main attractions and some of the city's finest jewelers have located themselves here.
- Sarojini Nagar Market – It is a lively market where middle-class locals shop
- Hauz Khas Village - The range of shopping items here include high fashion garments, carpets, old silver antiques, furniture and artefacts using traditional techniques fashioned for urban tastes.

10.3.7.2.3.   **Entertainment**

There are wide variety of entertainment options which include theatres, auditoriums, cinemas, nightclubs and discos.

10.3.7.2.4.   **Visitor Attractions**

The city has a wide variety of visitor attractions. There are a plethora of ancient monuments, the famous ones being Qutab Minar, Red Fort, Humayun's Tomb, Lodhi's Tomb, Jama Masjid, Jantar Mantar. There are national museums, art galleries, zoological park, gardens and famous temples of different faiths. Some of the major attractions have been described as follows:

- **India Gate** – It is the landmark of Delhi and was built by Edwin Lutyens to commemorate the Indian soldiers who died in the World War I and the Afghan Wars
- **Qutab Minar** - Qutab Minar is the tallest brick minaret in the world, and an important example of Indo-Islamic ArchitectureThe Qutb Minar and its monuments are listed as a UNESCO World Heritage Site.

Fig. 10.23: Qutab Minar, New Delhi

- **Red Fort** - The Red Fort was the palace for Muslim Mughal Emperor Shah Jahan's new capital, Shahjahanabad, the seventh Muslim city in the Delhi site. The Fort gets its name from the massive wall of red sandstone that defines its eight sides. The fort lies along the Yamuna River, which fed the moats that surround most of the wall.
- **Humayun's Tomb** - Humayun's tomb is a complex of buildings of Mughal architecture and encompasses the main tomb of the Emperor Humayun as well as numerous others, including the Barber's Tomb. The complex is a World Heritage Site and the first example of this type of Mughal architecture in India. This style of mausoleum was the same that created the Taj Mahal in Agra.
- **Lodhi Gardens** – It is one of the finest gardens in Delhi and is popular for its beautiful landscape. The lodhi tomb is located inside the gardens and is also a popular destination for tourists.

- **National Museum** - The National Museum, has in its possession over 2,00,000 works of exquisite art, both of Indian and Foreign origin covering more than 5,000 years of cultural heritage
- **Birla Mandir** - This is one of the landmarks in the nation's capital New Delhi. It was built in the 20th century by the Birla family of industrialists known for its many other temples in India. It is modern in concept and construction. It attracts several devotees and international tourists
- **Lotus Temple** - Shaped like a half opened Lotus flower, this temple is made of marble, cement, dolomite and sand. The Temple is a marvel of modern architecture, which is visible from several spots in south Delhi.

Fig.10.24: Lotus Temple

- **Jantar Mantar** – The Jantar Mantar of Delhi is only one of the five observatories built by Sawai Jai Singh II and is a popular attraction among tourists.
- **National Zoological Park** - National Zoological Park or the zoo of Delhi is one of the finest zoos in Asia and is situated close to Purana Qila or Old Fort. It sprawls across 214 acres and was established in 1959. It aims to provide natural habitat to more than 2,000 animals and birds species that have been brought here from all the continents such as Africa, America, Australia and even Asia. An idyllic picnic spot in winters, the serenity of the greens here is pleasing and offers a delightful respite from the humdrum of the city.

10.3.7.3.   **Tourist Services & Facilities**

10.3.7.3.1.   **Physical Infrastructure – Rail – Road – Air Connectivity**

The city is well connected by rail, road and air. International airport at Delhi provides direct air connectivity with major international destinations. Delhi is connected to all the major cities and towns by rail. The city has excellent road connectivity with the rest of the country via National Highways.

10.3.7.3.2.   **Accommodation facilities**

A variety of accommodations are available in Delhi which include classified/unclassified hotels and private and government guest houses.

10.3.7.3.3.   **Accessibility/ Transport mode**

Delhi has international airport making it directly accessible from major international destinations. Moreover, the rail network and road connects Delhi to all the major locations in the country. There are a number of local transport options available which include public bus services, underground metro services and private vehicles.

10.3.7.3.4.   **Services/ Facilities**

The website of the state tourism department has comprehensive information of the various aspects of the city for the tourists. In addition, there are tourist information centers at various locations (airport, monuments, railway station) to assist tourists. There is also tourist police at prominent location like India Gate for assisting tourists.

10.3.8.   Dwarka

Dwarka is one of the important pilgrimage destinations for Hindus worldwide and considered one of the most ancient cities in India.

Fig10.25: Dwarka city landscape

10.3.8.1.   Primary Resource Base

10.3.8.1.1.   Natural Environment

Dwarka is situated in the extreme west of the Indian state of Gujarat in the Saurashtra peninsula on the Arabian Sea. The city is built on the right bank of Gamut creek.

10.3.8.1.2.   Culture & Heritage

Dwarka is an important religious center for Hindus and is one of the four dhams of Hindu pilgrimage. It is also the site of Dwarka Pitha, one of the four cardinal mathas established by Sri Adi Shankaracharya.

10.3.8.1.3.   Towns & Villages

Dwarka is a medium sized town having a native population of around 33,000 (as per 2001 census).

10.3.8.1.4.   Outdoor Activity

The destination offers sightseeing options for travelers with its many temples and the seashore.

10.3.8.2.   Secondary Resource Base

10.3.8.2.1.   Festivals/ Events

Dwarka being an important pilgrimage center, all major Hindu festivals are celebrated here. One of the most prominent festival celebrated in Dwarka is Janmashtami (birthday of Lord Krishna), in the month of August/September.

10.3.8.2.2.   **Shopping**

There are no unique items of interest for shoppers. Decorative items related to Hinduism are available at most of the shops.

10.3.8.2.3.   **Entertainment**

The major avenues of entertainment are the festivals held at different times of the year.

10.3.8.2.4.   **Visitor Attractions**

The main attractions in Dwarka are the temples. Some major temples are:

- **Jagat Mandir** - Dwarka is famous for the temple of Dwarkadhish, the ` Lord of Dwarka' also known as Jagat Mandir or temple of the world. It is one of the prominent attractions of the destination.

Fig.10.26: Entrance to Dwarkadeesh Temple

- **The Sharada Peetha** - This is one of the four Mathas established by Jagat-guru Shankaracharya, all of which survive to this day. The Matha runs an educational society, an arts college and a Sanskrit Academy, which prepares scholars for doctorates in Sanskrit and Indology.
- **Bet Dwarka** - Also known as Bet Shankhoddar, It is said to be the place where Lord Krishna lived with his family when he ruled at Dwarka. It is located on an island and is popular attraction with tourists.

Fig.10.27: Bet Dwarka

- **Gomati Ghat Temples** – The temples are built on the bank of gomati ghat and are dedicated to various gods and goddesses.

10.3.8.3.   Tourist Services & Facilities

10.3.8.3.1. Physical Infrastructure – Rail – Road – Air Connectivity

The destination lacks direct air connectivity; Jamnagar is the nearest airport and is about 150 kms away. Dwarka lies on the meter gauge railway line that runs from Viramgam to Okha and has a railway station. State highway links Dwarka.to major citites in the state.

10.3.8.3.2. Accommodation facilities

Dwarka has a number of classified /unclassified hotels, guest houses and dharmasalas

10.3.8.3.3. Accessibility/ Transport mode

The main connectivity mode to the destination is via road. The most convenient transport mode to visit the destination is privately hired vehicles.

10.3.8.3.4. Services/ Facilities

The state tourism website lists basic information about the site. However, there is lack of comprehensive information regarding the facilities and services available for tourists.

10.3.9.   **Goa**

Goa is a popular destination in India for both domestic and foreign tourists. It is one of the few destinations which are visited by travelers all throughout the year. It abounds in natural beauty and cultural heritage; the combination of which makes it an attractive destination for the travelers.

Fig.10.28: Baga Beach, Goa

10.3.9.1.   **Primary Resource Base**

10.3.9.1.1.   **Natural Environment**

Goa is located in west coast of India and has the Arabian Sea along its western side and a continuous beach front along the coastline. The eastern side of Goa is densely forested where most of the Wild Life Sanctuaries are located.

10.3.9.1.2.   **Culture & Heritage**

The state has a distinct culture and heritage, having been under Portuguese rule prior to independence. The Portuguese heritage reflects in the old buildings especially the churches and cathedrals which are spread all across the state.

10.3.9.1.3.   **Towns & Villages**

Goa covers an area of 3702 square kilometers and comprises two revenue districts viz North Goa comprising six talukas with a total area of 1736 sq. km. and South Goa comprising five talukas with an area of 1966 sq. kilometers. In all there are 383 villages of which 233 are in North Goa district and 150 in South Goa district. As per the 2001 census, there are 44 towns of which 14 are Municipalities and remaining are census towns.

10.3.9.1.4.   **Outdoor Activity**

The outdoor activity options in Goa are varied. The state offers a number of water sports options on its beaches. The state tourism department also offers river and backwater cruising facilities. There are other outdoor activities which can be pursued such as bird watching,, trekking, etc.

10.3.9.2.   Secondary Resource Base

10.3.9.2.1.   Festivals/ Events

The state celebrates number of festivals and fairs, one of the major events being the carnival which is one of the key attractions of the state. The major festivals and events are:

- Carnival: Carnival in Goa is a non-stop 3-day festival of color, song and music, providing a healthy entertainment for all.

Fig.10.29: Goa Carnival

- Mahashivratri: A celebration in the honor of Lord Shiva held at all the principal Shiva temples; it is celebrated in Harvalem, Ramnathi, Kavlem, Mangueshi, Nagueshi, Shiroda, Brahmapuri. Shirgao, Kasarpal, Fatorpa and Panaji.

- Feast of the Three Kings at Reis Magos, Cuelim (Cansaulim) and Chandor, January

- Shigmo Festival: Holi in Goa is celebrated as Shigmotsav, which is a festival of farewell to winter and welcome to spring celebrated with color, songs and dances to the beat of drums. Float parades depicting various scenes of mythology are also held.

10.3.9.2.2.   Shopping

The local handicrafts of Goa are the most popular souvenir items and include brassware, terracotta, shell work, crochet, carved furniture, bamboo work, papier-mâché, etc. These are available in the Government Emporia and also at shops and stalls near the popular tourist spots. Cashew nut is another popular item with tourists. There are shops specializing in selling only cashew nuts. There are also many fascinating options in the lifestyle and fashion shops which have come up in recent times. Some of these are located in fabulous old Goan houses which have been painstakingly restored.

Fig 10.30: Anjuna Flea Market, Goa
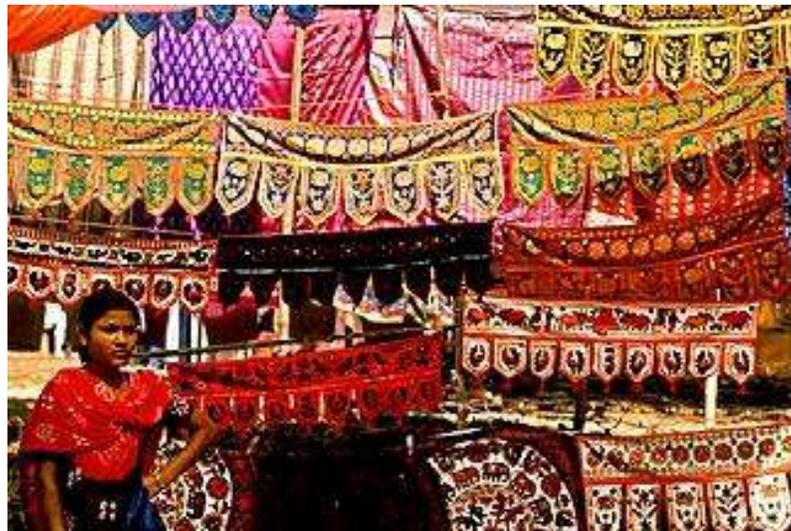
10.3.9.2.3.   Entertainment

There are number of entertainment options in Goa which include aqua-activities such as surfing, snorkeling, jet-skiing, boogie boarding, scuba diving, water-skiing, parasailing, windsurfing, and deep sea fishing ,nightlife options such bars & pubs, casinos, nightclubs & discos and other activities such as bird-watching, bungee jumping, Crocodile Watch and river cruises.

10.3.9.2.4.   Visitor Attractions

There is wide variety of visitor attractions which include the churches and cathedrals, beaches, forests and national parks. Goa is most famous worldwide for its beaches, some of its popular beaches are:

- **Arambol Beach**- A unique beach in the North Goa, it is both rocky and sandy beach and much sought after by foreign tourists. It has a sweet water tank right on the shore. Due to its isolation, not many tourists have been able to reach this beach.
- **Anjuna Beach** - Anjuna is 18 kms from Panaji, the capital of Goa. The attractions of Anjuna Beach are the magnificent Albuquerque Mansion built in 1920 (flanked by octagonal towers and an attractive Mangalore tile-roof), the Mascarenhas Mansion, and the Chapora Fort.
- **Baga Beach** - Baga Beach is part of a 30-km stretch of beach coastline along the west coast of Goa by the Arabian Sea. It is one of the most popular beaches frequented by foreign tourists due to its lovely scenery.

- **Betul Beach** - This lovely beach is located on the estuary of the river leading off from the bottom of Benaulim. Moreover this beach is a virgin beach untouched by tourism; it provides a stretch of silvery sand, with the secluded wilds.
- **Calangute Beach** - Calangute lie on the shores of the Arabian Sea of North Goa in India. It is encircled by Arpora-Nagoa, Saligao and Candolim, in the Bardez taluka, and is just 15 km from Panaji, the capital of the state of Goa.
- **Colva Beach**- Colva beach is 6kms. from Margao.
- **Dona Paula Beach**- Dona Paula is 7 km from Panaji near the rocky point between the Mandovi and the Zuari is Dona Paula, a secluded bay with a fine view of the Marmagao harbour.
- **Miramar Beach**- Miramar is a lovely golden beach of soft sand girdled with palm trees - is almost part of Panaji. It is one of the most popular beaches.
- **Palolem Beach** - Palolem is probably Goa's most beautiful and idyllic beach and it has 1.5 km crescent shaped beach. The beach lies on the southern coastline of Goa amidst outstanding natural beauty.
- **Vagator Beach** - Vagator which is one of the most beautiful soft white sand beaches of Goa.

Built of laterite and lime plaster, the churches and cathedrals built during 16th to 17th century A.D. are a legacy of the Portuguese. The main churches and cathedrals in Goa are:

- **The Professed House And The Basilica Of Born Jesus** - A mix and match of Renaissance & Baroque Styles, this houses the mortal remains of St. Xavier. This church has been designated as world heritage site by UNESCO.
- **The Church Of St Francis Xavier** - St. Francis Xavier is built of laterite plaster with lime mortar. With tiled roof supported by wooden rafters, it is a plain chapel with only one altar. The church was built in Doric Architectural style. It is one of the most prominent churches in Goa.
- **Se Cathedral** - The Portuguese Viceroy Redondo commissioned the Se, or St. Catherine's' Cathedral, southwest of St. Cajetan's, to be "a grandiose church worthy of the wealth, power and fame. It took 80 years to build and was not consecrated until 1640.

Fig. 10.31: Se Cathedral

- **The Royal Chapel Of St Anthony** - Built in the beginning of the 17th century, the Royal Chapel is dedicated to St. Anthony. St. Anthony is the national saint of Portugal and held in great veneration by the Portuguese.

- **The Convent And The Church Of The Cross Of Miracles** - On the southern outskirts of Old Goa is a hill on which lies this convent and church. Built of laterite, plastered with lime mortar, the plain looking church and the single storeyed convent with numerous cells are in ruins.

- **The Chapel Of St Catherine** - Built of laterite blocks, the chapel was rebuilt in 1552 on the remains of an earlier structure, built in 1510 by Afonso de Albuquerque to commemorate his entry into Panaji on St. Catherine's Day.

- **The Church Of Our Lady Of The Mount** - Commanding a picturesque view, is the Chapel of Our Lady of the Mount, built under the orders of Afonso de Albuquerque in 1510. It was reconstructed twice.

- **The Church Of The Carmelites** - Built in 1621, the Church of the Carmelites is one major place of tourist's interest.

- **The Church Of St Francis Of Assisi** - The structure built of laterite blocks is lime-plastered and is one of the most interesting places in Goa to see.

- **The Church Of Our Lady Of The Rosary -** It is one of the earliest churches built in Goa and was built in fulfillment of a vow taken by Afonso de Albuquerque while reviewing the battle between his forces and those of the Bijapur sultan from the same spot, on which the church stands.

- **The Church Of St Cajetan** - The large and beautiful church of St. Cajetan built of laterite blocks is lime plastered and displays a Greek influence.

- **The Convent And Church Of St John Of God** - Situated to the east of the tower of St. Augustine, the Church is a plain looking building constructed in the beginning of the 18th century.

Some of the other attractions in Goa are:

- **Fort Aguada** – It is an old Portuguese fort built in 1612 and was a reference point for the vessels coming from Europe at that time. This old Portuguese fort stands on the beach south of Candolim, at the shore of the Mandovi river.

Fig 10.32: Ruins of Fort Aguada

- **Salim Ali Bird Sanctuary -** The sanctuary is named after one of India's most prominent ornithologists, Dr. Salim Ali. The Sanctuary is spread over an area of 1.78 sq km. and is located at the western tip of the Chorao Island along river Mandovi near Panaji. It is fully covered with mangrove species. A variety of local and migratory birds can be found on this island.

Fig. 10.33: Salim Ali Bird Sanctuary

10.3.9.3.   Tourist Services & Facilities

10.3.9.3.1.   Physical Infrastructure – Rail – Road – Air Connectivity

The state is well connected by rail, road and air. Dabolim International Airport provides direct air connectivity from major international destinations. The state is well connected by rail network and is served by the Konkan railways; Margao (33 kms) and Vasco Da Gama (30 kms) are the nearest railheads in order to visit the churches and convents. The state capital Panaji is connected by road to Bangalore (598 kms) and Mumbai (594 kms). In addition, the state has excellent internal road network.

10.3.9.3.2.   Accommodation facilities

There are wide range of accommodation facilities available in the state which include resorts, heritage hotels, starred and unstarred hotels, guest houses and camping facilities at beaches.

10.3.9.3.3.   Accessibility/ Transport mode

The tourists can access the various locations in the state easily by different modes. The Goa Transport Corporation, Kadamba, runs long-distance services throughout the state from their main stand at Panjim, Mapusa, Margao and from locations in the adjoining states of Maharashtra and Karnataka. There are private buses, serving everywhere else, including the coastal resorts. All the major hotels also arrange transport services for the guests and prepaid taxi services are also available.

10.3.9.3.4.   **Services/ Facilities**

The state tourism department has a number of tourist information counters in various states and also at various places in Goa. In addition, the website of the state tourism department also has useful information regarding accommodation facilities, tour operators, vehicle rentals, tour packages, cruises, etc.

10.3.10.   Hampi

Hampi is the site of the ancient Vijaynagara Empire. The destination is in the state of Karnataka and is a UNESCO world heritage site.

Fig 10.34: Hampi

10.3.10.1.   Primary Resource Base

10.3.10.1.1.   Natural Environment

The site has a hilly landscape, dotted with numerous granite boulders. The major natural feature of the landscape is the river Tungabhadra which lies to the north of the site.

Fig 10.35: Tungabhadra River
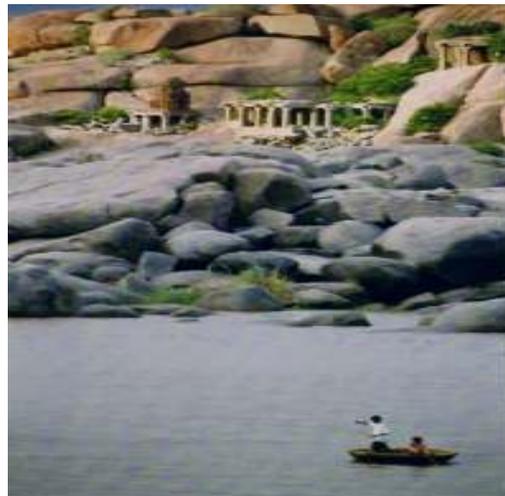
10.3.10.1.2.   Culture & Heritage

Hampi was the seat of the ancient Vijaynagara Empire and is a UNESCO World Heritage Site. It has a number of ancient monuments and temples dating back to the 14th century.

10.3.10.1.3.   Towns & Villages

The site is located in the Bellary district of Karnataka and there is a small village within the ruins of the ancient city. The nearest town to the site is Hospet which is at a distance of around 13 kms.

10.3.10.1.4.   Outdoor Activity

The destination is famous for its ancient monuments and the outdoor activity options are limited to sightseeing.

10.3.10.2.   Secondary Resource Base
10.3.10.2.1.   Festivals/ Events

The Vijayanagar Festival organized by the Government of Karnataka in December is the major event at Hampi. Some of the other festivals celebrated are the Virupaksha Temple Car Festival is held in February each year and the Marriage Festival of Virupaksha & Pampa celebrated in the Virupaksha Temple in December.

10.3.10.2.2.   Shopping

There are a few small shops in the Hampi Bazaar. However, handicrafts and other specialized items are not available.

10.3.10.2.3.   Entertainment

The main sources of entertainment are the different festivals held at various times of the year.

10.3.10.2.4.   Visitor Attractions

The main attraction in Hampi is the ancient city complex of Vijayanagara kingdom, having numerous temples and monuments. Some of the prominent structures in the ancient city complex are:

- **Virupaksha Temple** - The Virupaksha Temple at the western end is one of the earliest structures in the city. The main shrine is dedicated to Virupaksha, a form of Lord Vishnu. The temple is still in use at the present day.

Fig 10.36: Virupaksha Temple, Hampi

- **Ugra Narasimha** – Nearby the Virupaksha Temple is the 6.7m tall monolith of Ugra Narasimha, it is one of the finest examples of Vijaynagara architecture.

Fig 10.37: Figure of Ugra Narasimha, Hampi

- **Vithala Temple**- The temples incredible sculptural work is a pinnacle of Vijayanagar Art. The outer pillars are known as the 'Musical Pillars' as they reveberate when tapped.

Fig 10.38: Stone chariot in Vithala temple compound

- **Shivalinga** - The gigantic shivalinga is located next to the Narasimha figure. It is 3 m high and stands permanently in water that comes through an ancient channel.
- **Lotus Mahal** - The palace is delightful synthesis of the Hindu and Islamic styles of architecture.

- **Virupaksha Bazaar** - 32 m wide and 728 m long, this street that runs between the Virupaksha Temple and the foot of the Matanga Hill is the longest street laid out by the Vijaynagara kings.
- **Hazara Rama Temple** - The temple built within rectangular complex lies at the heart of the royal centre. Dating from the early 15th century, the hall of the Hazara Rama Temple has finely carved basalt pillars depicting the incarnations of Lord Vishnu.
- **Queen's Bath** - Situated in the citadel area, south of the Hazaara Rama Temple the Queen's Bath is a large square structure, remarkable for the contrast between its plain exterior and the very ornate interior.

Fig 10.39: Queen's Bath, Hampi

- **Singaradu Hebbagilu** - This is one of the oldest and most massive of the gateways in the capital city.
- **Achuta Raya Temple** - The Tirvengalanatha temple, which was built during reign of Achuta Deva Raya, is better known by the name of ruler and is one of the major attractions of the site.

10.3.10.3.   Tourist Services & Facilities

10.3.10.3.1. Physical Infrastructure – Rail – Road – Air Connectivity
The destination has limited connectivity. There is no direct air or rail connectivity. The nearest Airport is at Bangalore which is 350 Km from the site. Hospet is the nearest railhead (13 kms) for the site. Hospet is linked to Bangalore, Bijapur, Hubli and Guntakal. The site is accessible by road through Bangalore (350 Kms) and Hospet (13 Kms).

10.3.10.3.2. Accommodation facilities
There are no hotels in Hampi, however there are private lodges and guest houses available. Accommodation facilities are available at Hospet

10.3.10.3.3. Accessibility/ Transport mode
The main connectivity mode to the destination is via road. The most convenient transport mode to visit the destination is privately hired vehicles.

10.3.10.3.4. Services/ Facilities
The state tourism website lists basic information about the site. However, there is lack of comprehensive information regarding the facilities and services available for tourists.

10.3.11.   Hyderabad

Hyderabad is the capital of Andhra Pradesh and is known for its rich history, culture and architecture representing its unique characteristic of a meeting point for northern and southern India. The most famous monument of Hyderabad is the Charminar which is the landmark of the city.

Fig 10.40: Charminar, Hyderabad

10.3.11.1.   Primary Resource Base

10.3.11.1.1.   Natural Environment

Hyderabad is the capital city of Andhra Pradesh. It is perched on the top of the Deccan Plateau, 1776ft. above sea level and sprawls over an area of 100 sq. miles and is noted for its natural beauty, mosques and minarets, bazaars and bridges, hills and lakes

10.3.11.1.2.   Culture & Heritage

The city is nearly 400 years old and was founded on the River Musi five miles east of Golconda, in 1591-92 by Muhammad Quli Qutb Shah. On account of being ruled by the nizams as a princely state, it has developed its own distinct culture.

10.3.11.1.3.   Towns & Villages

Hyderabad is the administrative capital of Andhra Pradesh and is a bustling metropolis. The city population is estimated at over 3.69 million in 2001 while the population of the hyderabad greater metropolitan area is estimated at over 6.39 million.

10.3.11.1.4.   Outdoor Activity

Owing to the cosmopolitan nature of the city, outdoor activity options are predominantly urban. There are certain water sports activities available in the city.

10.3.11.2. **Secondary Resource Base**

10.3.11.2.1. **Festivals/ Events**

Hyderabad has traditional, religious and state festivals organized and celebrated in the city. Some of the popular festivals are:

- Deccan Festival- The deccan festival highlights Hyderabad's arts, crafts, culture and cuisine. This festival also includes a Pearls and Bangles fair and a food fair. Cultural programs, food stalls arts and craft shops etc. are also organized.

- Lumbini Festival - This festival is organized to celebrate the Buddhist Heritage of Andra Pradesh. The festival is celebrated in Nagarjunasagar and Hyderabad for three days from 2nd Friday of December every year.

- Makara Sankranti - This harvest festival is celebrated for 3 days in Mid January.

- Ugadi - This native New Year comes soon after the celebration of 'holi' in April-May. Spring is considered as the first season of this native New Year of Andra.

10.3.11.2.2. **Shopping**

There are a variety of shopping options in the city which include gems and semiprecious stones (especially pearls). One of the most famous shopping areas is the Lad Bazaar. It is a shopping centre of the old city specializing in bridal ware.

10.3.11.2.3. **Entertainment**

There are wide variety of entertainment options which include theatres, auditoriums and cinemas.

10.3.11.2.4. **Visitor Attractions**

The main visitor attractions in the city are the ancient monuments and palaces. Some key attractions are:

- **Charminar** - Charminar, the edifice of four minarets, is the legendary masterpiece of the Qutb Shahis. The awesome rectangular structure was built upon four grand arches by Muhammad Quli Qutb Shah in 1591 to commemorate the end of the plague. It is the landmark of Hyderabad.

- **Golconda Fort** - Founded originally by the Kakatiyas in the 13th century, the existing structure was expanded by the Qutb Shahi kings into a massive fort of granite with walls and ramparts extending some 7km. in circumference.

- **Qutab Shahi Tombs** - The tombs erected in the memory of the departed kings of Golconda are truly magnificent monuments that have stood the test of time and the vagaries of nature.

- **Falaknuma Palace** - Built by one of the Paigh nobles Sir Vicar ul Umra, and later bought by the Nizam, the Falaknuma Palace (meaning "Mirror in the Sky") is 5km south of the Charminar. This palace was designed by an Italian architect and houses some rare treasures collected by the Nizam.

Fig.10.41: Falaknuma Palace

- **Salarjung Museum** - A collection of art objects by Nawab Salar Jung III, this museum houses magnificent exhibits of European and Indian paintings and statuary. Of special interest is the Jade Room containing priceless objects which belonged to ancient Indian rulers like Aurangzeb and Tipu Sultan.

Fig.10.42: Salarjung Museum

- **Birla Mandir** - This temple is built entirely out of marble from Rajasthan, stands atop the Kala Pahad, the twin hillock of the Naubat Pahad. Built by a Birla Foundation over a span of ten years, the main temple is dedicated to Lord Venkateshwara.

Fig.10.43: Birla Mandir

- **Tank Bund** - Hyderabad's most popular promenade, the Tank Bund dams the Hussain Sagar Lake. It is lined with 33 statues of famous personalities of the state. Recently installed is the monolith of Buddha at the centre of the lake. This lake is the venue of many water sport events.

Fig 10.44: Statue of Mahavir at Tank Bund
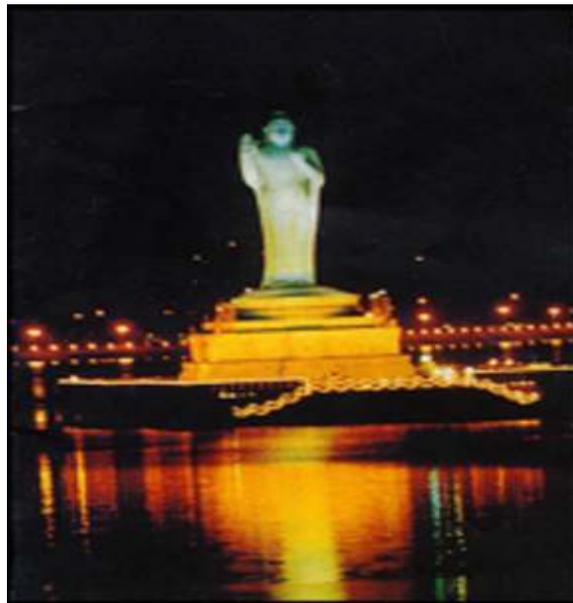
- **Birla Planetorium** - In the heart of the city is the B.M. Birla Planetarium, one of the newest and the most modern planetariums in India. It is being developed into a centre for the study of astronomy.
- **Nehru Zoological Park** - This zoo spreads over 300 acres and is one of the largest in Asia. Over 3000 different species of birds and animals can be seen here. It has a unique nocturnal zoo which houses animals not normally seen during the day.

- **Public Gardens** - Originally called the Bagh-e-aam, it consists of well laid out gardens. It also houses the imposing State Legislative Assembly building, the Jubilee Hall, the Jawahar Bal Bhavan, the Health Museum and the State Archaeological Museum.

10.3.11.3.   Tourist Services & Facilities

10.3.11.3.1.   Physical Infrastructure – Rail – Road – Air Connectivity

Hyderabad is well connected via rail, road and air. It has an International airport which provides direct air connectivity with major international destinations. Rail head at Hyderabad connects it to major cities in the country, and the city lies on National Highway No. 7 and 9 connecting it to the rest of the country.

10.3.11.3.2.   Accommodation facilities

Hyderabad has a wide range of accommodation facilities including classified/unclassified hotels, guest houses and dharmashalas.

10.3.11.3.3.   Accessibility/ Transport mode

The tourists can travel within the city by various modes. The city has a public bus service and private transport services are also available.

10.3.11.3.4.   Services/ Facilities

The municipal administration website lists general information on the city.

10.3.12. Jagannath Puri – Bhuvansehwar – Konark – Chilika Circuit

The Jagannath Puri – Bhuvansehwar – Konark - Chilika Circuit is also known as the Golden Triangle circuit of Orissa. The majority of the tourists coming to Orissa prefer to visit this circuit. The circuit consists of destinations which have a rich cultural heritage and also abound in natural beauty.

Fig 10.45: View of Jagannath Temple, Puri

10.3.12.1.   Primary Resource Base

10.3.12.1.1. Natural Environment

The circuit is located in the south eastern part of the state. The majority of destinations in the circuit lie along the Bay of Bengal. Jagannath Puri is located along the coastline of the state and has an impressive beachfront. Bhuvaneshwar is the capital of Orissa and lies in the Khurda district. Konark is located north of Puri along the coastline. Chilika is the largest lagoon along the east coast of India and is a unique assemblage of marine, brackish and fresh water eco-system with estuarine characters.

Fig. 10.46: Chilika Lagoon

10.3.12.1.2. Culture & Heritage

The state is known for its culture and heritage and the circuit is especially known for its religious heritage. The Jagannath temple in Puri is one of the important pilgrimage centers of Hindus especially Krishna followers' worldwide. The sun temple of Konark is a UNESCO world heritage site. Bhuvaneshwar, the capital city of Orissa is known as temple city of India, having innumerable temples of different gods and goddesses.

10.3.12.1.3. Towns & Villages

There are a total number of 1714 villages in the Puri district, in which the majority of the destinations of the circuit lie. However, the major towns in the circuit are Bhuvaneshwar and Puri.

10.3.12.1.4. Outdoor Activity

The beaches at Puri and Konark offer picnicking opportunities to the tourists. Bhuvaneshwar has a number of temples and museums, in addition to zoos and National Park (Nandan Kanan). The Chilika lagoon offers boating options for the tourists at Satpada, in addition, there are water sports facilities available and Bird's Island offers bird watching facilities in the winter season for tourists.

10.3.12.2. Secondary Resource Base

10.3.12.2.1. Festivals/ Events

As Puri and Bhuvaneshwar are important pilgrimage centers, a number of religious festivals are celebrated all throughout the year with fervor and gaiety. One of the main festivals celebrated is the Rath Yatra, held in Puri which attracts both domestic and foreign tourists in large numbers. The Konark festival organized by Department of Tourism is also another major festival of the circuit. Some of the important fairs and festivals celebrated in the circuit are as follows:

Table 10.1: Fairs and Festivals in Jagannath Puri – Bhuvansehwar – Konark-Chilika Circuit

Festival	Month
Car Festival(Ratha Yatra)	July
Chandan Yatra	April
Gosani Yatra Dasahara	September./October
Sahi Yatra	For 7 days in March/April
Mahasiva Ratri	February
Magha mela at Konarak	January
Boita Bandan at Konark	October./November
Harirajpur Melan	March
Jhamu Yatra Kakatapur	May
Aunla Navami,	March
Makar Mela,Chilika	January
Bali Harachandi Mela,During Raj Festival	June
Konark festival by Deptt of Tourism,Govt of Orissa	1st week of December
Konark Music & Dance Festival, Konark Natya Mandap,	February
Basant Utshav,Parampara Raghurajpur	February
Puri Beach Festival at Puri, Organised by Hotel & Restaurant Association of Orissa Bhubaneswar	November
Sriksetra Mohoshav ,Puri, Organised by Srikshetra Mahoshav committee	April
Gundicha Utshav at Puri - Organised by Urreka,Puri	June

Fig. 10.47: Car Festival or Rath Yatra in Puri

10.3.12.2.2. Shopping

Orissa has a rich tradition of handicrafts which include appliqué works, brass and metal works, stone carvings, wood works, silver filigree, handlooms and textile works. The main shopping attractions of this circuit are also the handicraft items. There are a number of shopping centers including government run emporiums and shops at all the destinations in the circuit.

Fig. 10.48: Appliqué and Silver filigree work of Orissa

10.3.12.2.3. Entertainment

The natural beauty and festivals form the main source of entertainment in the circuit. As such, conventional entertainment options are limited in the circuit Bhuvaneshwar being the capital city has a number of theatres, auditoriums and cinema halls. However, the other destinations lack such facilities.

10.3.12.2.4. Visitor Attractions

The main visitor attractions in the circuit are the numerous ancient temples and monument the prominent among them being:-

- **Jagannath Temple, Puri -** The celebrated Temple of Lord Jagannath was constructed by Raja Ananta Varman Chodaganga Dev in 12th century A.D. It is dedicated to Krishna in his deity form of Jagannath and is considered one of the most sacred pilgrimage spots in India.

- **Sun Temple, Konark -** The magnificent Sun Temple at Konark is the culmination of Orissan temple architecture, and one of the most stunning monuments of religious architecture in the world. Built by the King Narasimhadeva in the thirteenth century, the entire temple was designed in the shape of a colossal chariot with seven horses and twelve wheels, carrying the sun god, Surya, across the heavens.

- **Lingaraj Temple, Bhuvaneshwar** - The Lingaraj temple is the largest temple in Bhuvaneshewar and is dedicated to Lord Shiva; it is an outstanding specimen of the Orissa style of temple building. The temple was built around 11th century and is one of the major attractions of the city.

Fig. 10.49: Sun Temple, Konark

The other major attractions of the circuit are:

- **Beaches of Puri and Konark** – The golden sand beaches of Puri and Konark are popular with tourists for their lovely views and natural beauty.
- **Nandankanan Zoo, Bhuvansehswar -** The Nandankanan Zoo lies in the Chandaka forest, along the Kanjia Lake. It also contains a Botanical Garden and part of it has been declared a sanctuary. Famed for its white tiger population, Nandankanan has over 67 kinds of mammals, 18 varieties of reptiles and 81 species of birds co-existing in the deeply forested boundaries. The zoo enjoys an excellent reputation internationally, for successfully breeding black panthers, gharial crocodiles and white tigers in captivity.
- **Chilika Lagoon** - The Chilika lagoon appeals to tourists especially nature lovers for its unique eco-system and rich bio-diversity; it has been designated a wetland of national importance under Ramsar convention by UNESCO.

10.3.12.3.   Tourist Services & Facilities

10.3.12.3.1. Physical Infrastructure – Rail – Road – Air Connectivity

The circuit is connected with rest of the country by air, rail and road. Domestic airport at Bhuvaneshwar provides air connectivity with the major destinations in the country. The circuit is connected by rail network at Puri and Bhuvaneshwar which have railway stations and are served by long distance trains from other major cities. The circuit is served by road network via state and national highways. However, connectivity to Konark and Chilika is only via road network from either Puri or Bhuvansehwar.

10.3.12.3.2. Accommodation facilities

There are wide range accommodation facilities available for tourists visiting the circuit. There are a number of classified/unclassified hotels, guest houses, dharmasalas in Bhuvaneshwar and Puri. The accommodation facilities in Konark and Chilika mainly comprise of hotels and guest houses run by OTDC.

10.3.12.3.3. Accessibility/ Transport mode

The locations are accessible by a variety of modes. Bhuvaneshswar can be accessed by road, rail and air. Puri can be accessed by rail from the major destinations in India. Access to Chilika and Konark is by road from Bhuvansehwar or Puri. The most convenient way to visit the various destinations within the circuit is by road. Public transport services are available to access the destinations; in addition commercial vehicles can be hired to visit the destinations

10.3.12.3.4. Services/ Facilities

The state tourism website lists useful information for tourists. There are also tourist information centers at various locations in Puri, Bhuvaneshwar and Konark. The Chilika Development Authority runs an information center and office at Chilika which provides information to the tourists through audio visual presentations and publishing materials. The authority has set up a museum especially for students to display the bio-diversity of the lagoon.

10.3.13.   **Jagdalpur-Tirathgarh-Chitrakote-Barsoo Circuit**

The Jagdalpur-Tirathgarh-Chitrakote-Barsoo circuit is located in the state of Chhattisgarh and is famous for its tribal culture and natural beauty.

Fig.10.50: Tribal Dance of Chhattisgarh

10.3.13.1.   **Primary Resource Base**

10.3.13.1.1.   **Natural Environment**

The area around Jagdalpur is forested and the circuit is rich in natural resources. Some of the destinations in the circuit such as Tirathgarh Falls are located inside National Parks.

10.3.13.1.2.   **Culture & Heritage**

The circuit is located in the Bastar region which has its distinct tribal culture and heritage. Historically, Bastar formed the buffer zone between Deccan in South India and the Rajput splinter-states of Central India. It did not impact and was not impacted by happenings outside. As such, it developed its own way of life and governance. The population, mostly tribal, was native to India long before the Aryans arrived and they still follow their traditional lifestyle.

Fig.10.51: Tribal women of Chhattisgarh

10.3.13.1.3.   Towns & Villages

The major town in the circuit is Jagdalpur which is the administrative capital of Bastar district. Also, there are a number of small tribal villages within the circuit.

10.3.13.1.4.   Outdoor Activity

The circuit being rich in both natural beauty and cultural heritage offer excellent sightseeing options. The forests and national parks in and around the circuit offer excellent opportunities for trekking and camping, however, at present the circuit lacks adequate facilities for carrying out such activities.

10.3.13.2.   Secondary Resource Base

10.3.13.2.1.   Festivals/ Events

The main festivals/events are:

- Bustar Dussera Festival - Bastar Dussera is believed to have been started, in the 15th century, by Maharaj Purushottam Deo, the fourth Kakatiya ruler of Bastar. It is the region's most important festival, and all the tribes participate in the 10-day event.
- Bastar Lokotsav - This fortnight-long tourism event, organized to coincide with Bastar Dussera, showcases the best of Bastar. It takes place every year after the monsoons. Tribal handicrafts can be bought directly from artisans.
- Bastar Parab - A folk arts festival of tribal dances and music, is organized in Jagdalpur.

10.3.13.2.2.   Shopping

The main shopping attractions in the circuit are the handicrafts. Various kinds of exotic handicrafts made by the skilled hands of Bastar tribals are available in shops which are concentrated at Kumharapara, Jagdalpur. These include wooden crafts, bamboo crafts, terracotta, bell metal items, wrought iron items and cotton fabrics (Kosa sari etc).

10.3.13.2.3.   Entertainment

The main entertainment options are the fairs and festivals held during various times of the year.

10.3.13.2.4.   Visitor Attractions

The main attractions for the visitors in Jagdalpur are:

- **Danteshwari Temple** - It is an ancient temple built by the kings of Bastar for inhabiting their family Goddess, Devi Danteshwari. This temple is believed to posses several divine powers. Every year during Bastar dusshera, thousands of tribals from surrounding villages and jungles gather here to pay homage to the goddess.
- **Bastar Palace** – The Bastar Palace was built by the rulers of Bastar State when the capital of Bastar kingdom was shifted from Barsur to Jagdalpur. The Palace is around 70 years old and one of its unique features is that the royal family of Bastar still resides here.

Fig.10.52: Bastar Palace, Jagdalpur

- **Anthropological Museum** - This Museum is located in the office of the Anthropological Survey of India situated at Dharampura. It provides a perfect window-view of the life-styles of various adivasi tribes in Bastar

Fig.10.53: Artifact in the Anthropological Museum, Jagdalpur

- **Lakes** - There are two lakes namely Ganga Munda and Dalpat Sagar within the boundary of Jagdalpur town. The lakes are popular with local people for their natural beauty.

The other key attractions of the circuit are:

- **Chitrakote Waterfalls -** Chitrakote, the horse shoe shaped waterfall is on the river Indravati, situated at a distance of 38 Km. in the west of Jagdalpur. Height of this waterfall is approximately 100ft.The Chitrakote waterfalls can be called as the smaller form of the world famous Niagara waterfalls.

Fig.10.54: Chitrakote Falls

- **Tirathgarh Waterfalls** - These waterfalls are situated at a distance of 35 Km. from Jagdalpur in south west direction. The waterfall is actually situated in Kanger Valley National Park and the height is approximately 300 ft.

Fig.10.55: Tirathgarh Falls

10.3.13.3.   Tourist Services & Facilities

10.3.13.3.1. Physical Infrastructure – Rail – Road – Air Connectivity

Jagdalpur is well connected with road from Raipur and other parts of neighboring state Orissa. There is railhead at Jagdalpur connecting it to major cities in the country. There is no direct air connectivity however there is air strip situated in Jagdalpur; but presently no passenger services are being rendered from the airstrip.

10.3.13.3.2. Accommodation facilities

The choice of accommodation facilities is limited with 2 classified hotels (including 1 resort) in Jagdalpur. There are also tourist cottages available.

10.3.13.3.3. Accessibility/ Transport mode

The accessibility to the various destinations in the circuit is by road. Jagdalpur is connected by rail with the rest of the country.

10.3.13.3.4. Services/ Facilities

The state tourism website lists basic information about the destinations.

10.3.14. Mahabalipuram

Mahabalipuram is famous for ancient temples and monuments dating back to 7th century It is located around 60 km south from the city of Chennai in Tamil Nadu. The site has been classified as a UNESCO World Heritage Site.

Fig. 10.56 : Rathas, Mahabalipuram

10.3.14.1. Primary Resource Base
10.3.14.1.1. Natural Environment

Mahabalipuram is located on the Bay of Bengal coastline. The distinguishing natural feature of the destination is the beachfront.

Fig10.57: Beachfront, Mahabalipuram

10.3.14.1.2. **Culture & Heritage**

Mahabalipuram was the chief seaport of the Pallavas who ruled over much of South India from as early as the first century B.C to the eighth century A.D., and it is now recognized as the site of some of the greatest architectural and sculptural achievements in India. The beautiful cave temples and gigantic open air reliefs carved from blocks of granite date to the seventh century. The UNESCO has designated it as a world heritage site.

10.3.14.1.3. **Towns & Villages**

Mahabalipuram is a small town which is around 60 km. from Chennai. The town covers a total area of around 8 sq.km. and has a native population of only 13,000 (approx.).

10.3.14.1.4. **Outdoor Activity**

The beachfront is the main base of outdoor activities, having a number of ancient monuments. The tourists can have the option of sightseeing and picnicking at the beach. In addition, for wildlife enthusiasts, there is crocodile bank having various types of crocodile species and water sports options are available at Muttukadu.

10.3.14.2. **Secondary Resource Base**
10.3.14.2.1. **Festivals/ Events**

The major event in Mahabalipuram is the month long Annual Dance Festival organized by Department of Tourism, Tamil Nadu during January - February

10.3.14.2.2. **Shopping**

Mahabalipuram is a favorite shopping haunt for South Indian artifacts, both wooden and granite based. There are a number of shops which sell these items.

Fig.10.58: Artifacts on sale at Mahabalipram

10.3.14.2.3.   Entertainment

The main avenue of entertainment is the annual dance festival. Dance performances are also held at weekends for the tourists.

10.3.14.2.4.   Visitor Attractions

The chief visitor attractions are the ancient temples and monuments. The beachfront is also an attraction for the tourists. Some of the main attractions are:

- **Arjuna's Penance -** This bas relief, is an extensive panel 27 metres long & 9 metres high consisting of sculptures, with life size images
- **Rathas -** The eight rathas are monolithic temples fashioned as chariots. They remain an architectural mystery, for each is apparently a faithful reproduction of a structure built of wood.
- **Krishna Mandapam -** The Krishna Temple is one of the earliest rock-cut temples of Mahabalipuram. The walls of the temples reflect scenes of pastoral life, one with the image of Krishna lifting the Govardhan Hill in his fingertips to protect his people from Indra.
- **Shore Temple -** The shore temple is perched on a rocky outcrop and presides over the shoreline. The temple has shrine to both Shiva and Vishnu.

Fig.10.59: Shore Temple, Mahabalipuram

- **Crocodile Bank –** The crocodile bank was set up by Romulus Whitaker and breeds all the major species of crocodiles native to India.

- **Muttukadu** - An ideal place for water sports, Muttukadu is 21 km from Mahabalipuram. The Tamil Nadu Tourism Development Corporation (TTDC) has a boathouse here. Visitors can enjoy boating, canoeing, kayaking, and windsurfing.

10.3.14.3.   Tourist Services & Facilities

10.3.14.3.1. Physical Infrastructure – Rail – Road – Air Connectivity

The destination has limited physical infrastructure in terms of connectivity. It lacks direct air and rail connectivity and is accessible only by road from the state capital and some other major cities nearby. The nearest airport from Mahabalipuram is Chennai (Madras), located around 60 km away. The nearest railway station, Chengalpattu, is around 29 km away from Mahabalipuram. Trains for Chennai and several other major cities in South India are available from here. Mahabalipuram is connected by road to Chennai, Tirukkalikundram (Pakshithirtham), Kanchipuram (65 km), and Pondicherry.

10.3.14.3.2. Accommodation facilities

There are a number of classified and unclassified hotels, guest houses and dharmashalas at Mahabalipuram.

10.3.14.3.3. Accessibility/ Transport mode

Mahabalipruam is most conveniently accessible from Chennai via road. It is also accessible by road from Tirukkalikundram (Pakshithirtham), Kanchipuram (65 km), and Pondicherry. The state tourism department conducts package tours for Mahabalipuram. Private tour operators also conduct package tours for the destination. Public transport services are available from Chennai and commercial vehicles are also available for hire.

10.3.14.3.4. Services/ Facilities

The state tourism department website lists some basic information on the destination for the tourists.

10.3.15.   Rishikesh-Haridwar circuit

The circuit is located in the state of Uttaranchal and the destinations are important pilgrimage sites for Hindus. The circuit is also popular with foreign tourists who come to India with spiritual interests.

Fig10.60: View of Rishikesh

10.3.15.1.   Primary Resource Base

10.3.15.1.1.   Natural Environment

Rishikesh lies at the foothills of the Himalayas in the Tehri-Garhwal region of Uttar Pradesh. It is located at a height of about 1360 feet above sea level on the banks of the river Ganga. Haridwar located in the foothills of the Himalayas, represents the point where the Ganga reaches the plains.

10.3.15.1.2.   Culture & Heritage

Rishikesh is considered a spiritual retreat, having a number of ashrams and monasteries. There are a number of temples dedicated to various gods and goddesses in the town. Haridwar is an ancient pilgrimage site for Hindus and is considered the gateway to the "abode of gods".

10.3.15.1.3.   Towns & Villages

The destinations in the circuit are towns having a significant native population. Also, owing to their importance as pilgrimage sites, the towns have considerable floating population.

10.3.15.1.4.   Outdoor Activity

There are number of outdoor activity options such as river rafting, trekking and camping available in the circuit especially at Rishikesh.

Fig.10.61: River rafting in Rishikesh

10.3.15.2.   Secondary Resource Base

10.3.15.2.1.   Festivals/ Events

All the major Hindu festivals are celebrated in the circuit. One of the unique events held annually in Rishikesh is the International Yoga Week. At Haridwar, the major events besides the festivals celebrated are the Kumbh and Ardh Kumbh Mela held every 12 and 6 years respectively; Kumbh Mela is considered the largest religious gathering in the world.

Fig.10.62: Kumbh Mela Procession, Haridwar

10.3.15.2.2.   Shopping

The shopping options in the circuit include decorative items related to Hinduism, gems and jewellery.

10.3.15.2.3.   Entertainment

The circuit is a spiritual retreat and has a number of ashrams and monasteries. The main sources of entertainment are the various fairs and festivals held at different times of the year.

10.3.15.2.4.   Visitor Attractions

The main visitor attractions in Rishikesh are the temples .ashrams and the natural beauty. The main visitor attractions in Haridwar are the temples, ashrams and ghats especially Har Ki Paudi Ghat on the banks of Ganga.

Fig.10.63: Har ki Pauri Ghat, Haridwar

10.3.15.3.   **Tourist Services & Facilities**

10.3.15.3.1.   **Physical Infrastructure – Rail – Road – Air Connectivity**

The circuit lacks direct air connectivity. Rishikesh also lacks direct rail connectivity. It is connected by road from Haridwar and Dehradun. Haridwar has its own railway station connecting it to the major cities in the country and is connected via road from Delhi and Dehradun.

10.3.15.3.2.   **Accommodation facilities**

There are a number of classified/unclassified hotels, guest houses and dharmashalas at Rishikesh and Haridwar.

10.3.15.3.3.   **Accessibility/ Transport mode**

The main connectivity mode to the destinations within the circuit is via road. Haridwar is also accessible by rail. There are private bus services connecting the destinations, however, the most convenient transport mode to visit the destinations are privately hired vehicles.

10.3.15.3.4.   **Services/ Facilities**

The district administration website lists useful information on Haridwar.

10.3.16.   Varanasi - Sarnath

The Varansi-Sarnath circuit is famous due to its association with Hinduism and Buddhism. The destinations are located in northern India in the state of Uttar Pradesh and being in close proximity to each other make for an attractive pilgrimage package for tourists.

Fig10.64: View of Varanasi from the Ganges river bank
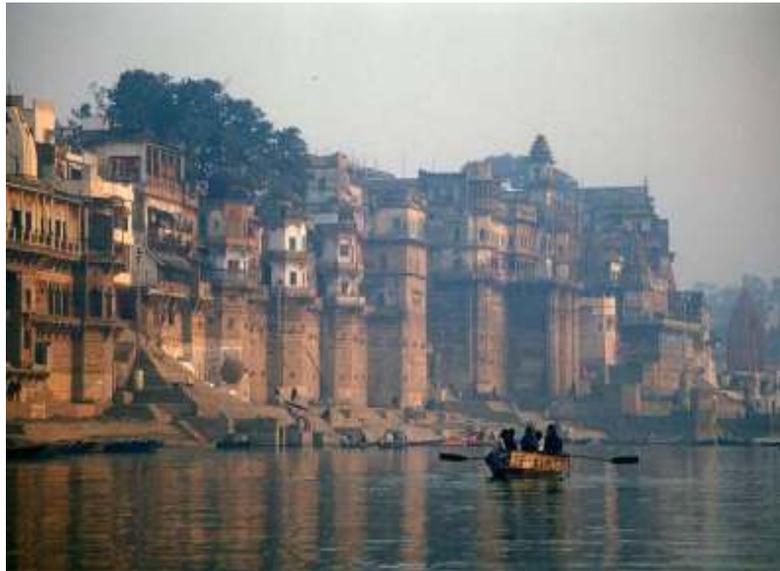
10.3.16.1.   Primary Resource Base
10.3.16.1.1.   Natural Environment

Varanasi is located on the banks of river Ganges and has a pleasant weather. Sarnath is located around 10 km from Varanasi. Both the destinations are situated on alluvial plains of northern India and have a flat terrain.

10.3.16.1.2.   Culture & Heritage

Varanasi is one of the ancient living cities of India. It is a religious center for Hindus and one of their most sacred places of pilgrimage. Sarnath is an important pilgrimage site for Buddhists; this is one of four pilgrimage sites designated by Gautama Buddha and has a number of monuments of Buddhist heritage.

10.3.16.1.3.   Towns & Villages

The destinations in the circuit are towns having a significant native population. The population of Varanasi urban agglomeration in 2001 was 1,371,749.

10.3.16.1.4.   Outdoor Activity

The outdoor activity options in the circuit are limited to sightseeing.

10.3.16.2.   Secondary Resource Base
10.3.16.2.1. Festivals/ Events
There are a number of festivals and fairs celebrated in the circuit. The major festivals and fairs celebrated in Varanasi are:

- Ramlila - Ramlila is a month long festival held in the months preceding Dusshera.
- Bharat Milap - Ram's reunion with his brother Bharat is celebrated on the day following Dussehra. A major event at Varanasi, this festival is attended by the Maharaja of Kashi in all his regal finery.
- Hanuman Jayanti - Based on the Saraswati, Ram & Krishnalila and Hanuman Charitra, stage plays are enacted to mark the Janmotsav (birth celebrations) of Lord Hanuman. The festivities continue for 5 days at the Sankat Mochan temple.
- Dhrupad Mela - This is one of the leading attractions of the city. Held in March, the 5-day music festival of Dhrupad is performed by renowned artists, from across the country, at Tulsi Ghat.
- Mahashivratri – This festival is dedicated to Lord Shiva and is one of the major events in Varanasi.
- Panch Koshi Parikrama - So named, because the parikrama passes through 5 places, Kardmeshwar, Bhimchandi, Rameshwar, Shivpur and Kapildhara

.The major festivals and fairs celebrated in Sarnath are:

- Budhha Purnima - This festival celebrates the birth of Lord Buddha with trditional religious fervour. A large fair is held at Sarnath and the relics of the Buddha are taken out for public display in a procession on this day.

10.3.16.2.2. Shopping
The shopping options in Varanasi include silk saris, handicrafts, carpets, rugs, musical instruments and dhurries. Besides ivory ware, brassware, copper ware and much more is readily available. The major shopping places in the city are the Chowk, Vishwanath Gali, Gyanvapi, Thatheri Bazar, Lahurabir, Godoulia, Dasashvamedh and Goldhar and the Government Emporia or souvenir shops approved by UP Tourism. Shopping options are lacking in Sarnath

10.3.16.2.3. Entertainment
The main avenues of entertainment are the fairs and festivals celebrated at different times of the year.

10.3.16.2.4. Visitor Attractions
The main attractions in the circuit are the places of Hindu and Buddhist heritage. The main visitor attractions in Varanasi are:

- **The Ghats** - Pilgrims flock the Ghats to have a ritual bath and perform puja to the rising sun, following centuries old tradition. The Dasashvamedh Ghat offers a splendid view of the river front. Other special ghats are the Asi, Barnasangam, Panchganga and Manikarnika, Ghats

Fig.10.65: One of the numerous Ghats in Varanasi

- **Viswanath Temple** - Dedicated to Lord Shiva, this temple is the most sacred shrine in Varanasi.
- **Banaras Hindu University** - Founded by Pandit Madan Mohan Malviya it is considered to be the largest residential university in Asia. Within the university campus, Vishwanath Temple and Bharat Kala Kendra are places of interest
- **Chunar Fort** - The Chunar Fort is situated 40 Km. from Varanasi. The Fort, overlooking the Ganges, has had a succession of owners representing most of India's rulers over the last 500 years.
- **Durga Temple** - It was built in the 18th century by a Bengali maharani and is stained red with ochre. The Durga Temple is commonly known as the Monkey Temple due to the many monkeys that have made in their home. Non-Hindus can enter the courtyard but not the inner sanctum.

Fig.10.66: Durga Temple, Varanasi

- **Archaeological Museum** - The main attraction at this excellent Archaeological Museum is the superb capital from the Ashokan pillar. It has the Ashokan symbol

of four back-to-back lions which has been adopted as the state symbol of modern India.

The main attractions in Sarnath are:

- **Dhamekha Stupa** - This is the most conspicuous structure at Sarnath. From the top of the stupa a stone tablet with an inscription "Dharmekha" was found which points out that this is the spot where the Buddha delivered his first sermon.

Fig10.67: Dhamekh Stupa, Sarnath

- **Ashoka Pillar** – The Ashoka pillar at Sarnath marks the site of the first sermon of the Buddha, where he taught the Dharma to five monks and is one of the major attractions of the destination.
- **Choukhandi Stupa** - The brick remains of the Stupa, dates from the Gupta period, and is said to be the site, where the Buddha was reunited with his five disciples, who had previously deserted him. Standing on a terraced rectangular plinth, the Stupa is capped by an octagonal Moghul tower, built by Emperor Akbar to commemorate his father's visit to the place.
- **Mulagundha Kuti Vihar** - This is a modern temple built by the Mahabodhi society and is visited by Buddhist pilgrims form world over.

10.3.16.3.   Tourist Services & Facilities
10.3.16.3.1. Physical Infrastructure – Rail – Road – Air Connectivity

The circuit is connected by rail, road and air. There is domestic airport at Varanasi and there is direct, daily flight connection between Varanasi and New Delhi and also to Kathmandu. Varanasi is also connected by air to Agra, Khajuraho, Calcutta, Bombay, Lucknow and Bhubaneshwar. Varanasi is an important and major rail junction. The city is linked by trains with all metros and major cities across the country. Also, Varanasi is connected with Calcutta (677 Kms.), Delhi (765 Kms.), Madras (1901 Kms.), Bangalore (1763 Kms.) and to the rest of the country by good motorable, all-weather roads. Sarnath lacks direct air connectivity, Varanasi is the nearest airport, at a distance of 10 km from Sarnath, the town also lacks direct rail

connectivity, the nearest railhead is Varanasi (10 Km). Sarnath is accessible by road from Varanasi.

10.3.16.3.2. Accommodation facilities

There are wide range of accommodation facilities in Varanasi which include classified/unclassified hotels, guest houses, tourist lodges and dharmasalas; unclassified hotels, guest houses and dharmashalas are available in Sarnath.

10.3.16.3.3. Accessibility/ Transport mode

The main connectivity mode to the destinations within the circuit is via road. There are private bus services connecting the destinations, however, the most convenient transport mode to visit the destinations are privately hired vehicles.

10.3.16.3.4. Services/ Facilities

There are number of government tourist information centers run by both the centre and states (U.P. and Bihar) in Varanasi.

10.3.17. Elephanta Caves

The Elephanta Caves are located off the coast of Mumbai, the capital of Maharashtra and a thriving cosmopolitan city. The caves are one of the major attractions of the city and have been designated as a World Heritage Site by UNESCO.

Fig 10.68: Carvings in Elephanta Caves

10.3.17.1.   Primary Resource Base

10.3.17.1.1. Natural Environment

The Elephanta Caves is located on Elephanta Island (also known as Gharapuri Island) located on the Mumbai harbor around 10 km off the coast of Mumbai. The island has a rocky terrain and has an area of around 16 km² (6 sq miles).

10.3.17.1.2. Culture & Heritage

The Elephanta Caves house rock cut temples dating back to the 5th century CE. The temples are dedicated to Lord Shiva and are rich in sculptural content.

10.3.17.1.3. Towns & Villages

The Elephanta Island owing to its isolation from the mainland does not have a significant native population

10.3.17.1.4. Outdoor Activity

The outdoor activity options on the island are limited to sightseeing.

10.3.17.2.   **Secondary Resource Base**

10.3.17.2.1. **Festivals/ Events**

All the major religious festivals are celebrated in Mumbai. However, at present, no major festivals or events are being held on the island.

10.3.17.2.2. **Shopping**

Shopping options are limited at the destination .There are many small shops selling curios and food items on the island. However, no specialized items are available to interest shoppers.

10.3.17.2.3. **Entertainment**

The entertainment options are lacking on the island. At present, tourists only have the option of sightseeing.

10.3.17.2.4. **Visitor Attractions**

The Elephanta cave is one of the major attractions of the city. Hewn out of solid rock, the Elephanta Caves date back to 600 AD. The cave complex is a collection of shrines, courtyards, inner cells, grand halls and porticos arranged in the splendid symmetry of Indian rock-cut architecture, and filled with exquisite stone sculptures of Hindu Gods and Goddesses.

Fig. 10.69: Elephanta Caves

10.3.17.3. **Tourist Services & Facilities**

10.3.17.3.1. **Physical Infrastructure – Rail – Road – Air Connectivity**

Mumbai is well connected via rail, road and air. It has International airport which provides direct air connectivity with major international destinations. Rail head at Mumbai connects it to major cities in the country, and the city is connected to all the major cities in India via extensive road network of National Highways. The islands can be accessed only by ferries from the Mumbai harbor.

10.3.17.3.2. **Accommodation facilities**

Mumbai has a wide range of accommodation facilities including classified/unclassified hotels, guest houses and dharmashalas. However, accommodation facilities are lacking on the island.

10.3.17.3.3. **Accessibility/ Transport mode**

The tourists can travel within Mumbai by various modes. The city has a public bus service, suburban rail network and private transport services are also available. The Elephanta Caves can be accessed by ferry services from the Gateway of India.

10.3.17.3.4. **Services/ Facilities**

The state tourism website lists basic information about the island

Chapter Eleven
Destination/ Circuits – benchmarking, new concepts and marketing

11.1.   **Overview**
This chapter takes an overview of the destinations, it's benchmarking with comparable destinations abroad, probable themes that can be woven around the destinations, new products to be incorporated and measures of marketing to be undertaken for different target markets.

11.2.   **Benchmarking with overseas destination**
The different circuits/ destinations in India can be compared with the different destinations abroad, keeping in mind their USP's, similarities in terms of its kitty of resource base (predominantly primary) and features, which can be replicated in the following destinations.

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Delhi	Beijing	MICE	The key features of the MICE tourism promotion strategy adopted by Beijing are: • Formation of a Promotion Council aimed to serve as a guild for international conference bidding and coordinate efforts among airlines, travel services, hotels, conference and exhibition centers, car service companies and all relevant supporting entities. • Allocation of special funds for compiling and producing bidding papers for international conferences and incentive programs, undertaking promotion activities and financing bidders to host promotional shows in foreign countries. • Involve the key MICE industry service operators (such as airlines, railway operators, travel services, hotels and conference and exhibition organizers) in formulation of a competitive pricing system in order to win market shares.

Reasons for Comparison: Delhi and Beijing besides being the capitals of the respective countries, have an almost <u>similar historical artifacts</u> as well as <u>cultural heritage</u>. While Beijing is on the verge of hosting Olympics in the year 2008, New Delhi would be hosting the 2010 commonwealth Games. Both the cities are concentrating on upgrading their respective infrastructural amenities keeping in mind the respective major events.

Strengths and Weaknesses of Indian Destinations compared to the Overseas ones	
Strength	**Weakness**
✓ Delhi has witnessed major economic and commercial activities in recent times ✓ New Accommodation units, Convention Centres and Seminar halls coming up in the city ✓ New modes of transport making headway ✓ Higher percentage of English speaking population compared to Beijing	✓ Lags in terms of infrastructural amenities ✓ Political will preventing growth in certain clusters

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Hyderabad	New Orleans	Culture and Heritage	The key features of the Culture & Heritage tourism promotion strategy adopted by New Orleans are: • The city has undertaken a comprehensive programme to restore the historically important segments of the city, especially the french quarters and showcase them as part of its unique heritage. • Develop a series of cultural events which integrate the vibrant art scene and architectural heritage of New Orleans (such as French Quarter Festival, Swamp Fest). • Incorporate tactical promotional communiqués in the marketing campaign(especially in the media campaigns) which invoke interest of the potential traveler towards the architectural heritage of the city.

Reasons for Comparison: Hyderabad is well known for its rich culture as well as heritage as the city of New Orleans is. Both the cities, while hosting modern amenities are also home to major resources in terms of its cultural heritage. While Hyderabad is home to the Nizam culture, New Orleans has a French colonial culture to boast of.

Strengths and Weaknesses of Indian Destinations compared to the Overseas ones	
Strength	**Weakness**
✓ Charminar area in Hyderabad is the hub of "Nizam" culture. ✓ It offers a unique experience to travelers in terms of culture, arts, cuisine and heritage. ✓ There is widespread infrastructure up gradation undergoing in the city owing to its being developed as an IT hub of South India..	✓ The Charminar area of the city is highly congested and the heritage structures (especially Charminar) are facing gradual degradation. ✓ The area lags in terms of infrastructural amenities.

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Jagdalpur, Chitrakote, Tirathgarh, Barsoo	Aboriginal Circuit, Australia	Tribal Tourism	The key features of the Aboriginal tourism promotion strategy are: • Involvement of local stakeholders (aborigines) in development of the tourism product • Incorporate preservation of culture and natural resources as part of the tourism development plans • Integrate employment generation for aboriginal people in the tourism development plans • Encourage tourism service providers (tour operators, travel agents, etc.) to focus on aboriginal tourism • Development of specialized infrastructure which would satisfy the needs of tourists and at the same time conserve the fragile natural resources of the aboriginal areas/regions • Undertake innovative tourism promotion activities (such as organizing aboriginal tourism expos, producing documentaries on aboriginal heritage, etc.)

Reasons for Comparison: The circuit of Jagdalpur, Chitrakote, Tirathgarh has an immense bounty of natural resources along with fascinating access to the tribal lifestyle. Australia also has an almost similar profile of destinations under its "Tribal Tourism" bounty.

Strengths and Weaknesses of Indian Destinations compared to the Overseas ones	
Strength	**Weakness**
✓ The circuit is unexplored and offers a novel experience to potential target customers.	✓ Lack of adequate infrastructural facilities. ✓ Lack of proper promotion of the circuit to the target customers

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Mahabalipuram, Badami, Halebid, Aihole, Elephanta Caves (Mumbai), Nalanda	Islands of Orkney, Scotland	Archaeological Heritage	The key features of heritage tourism promotion strategy of Orkney Islands are: • The tourism strategy has laid emphasis on infrastructure development at the sites and conservation of the unique heritage for tourism development. • The islands have created an integrated tourism product centered around the heritage sites to provide a wholesome experience to the travelers. • The tourism council of the islands has initiated specialized cultural events, participatory contests and developed facilities for outdoor activities. Moreover, the council also promotes the local arts and crafts of the islands to the tourists.

Reasons for Comparison: The destinations (Mahabalipuram, Badami, Halebid, Aihole, Elephanta Caves and Nalanda) are popular due to their archaeological heritage. They offer the tourists a glimpse into the rich and fascinating archaeological heritage of India. The Islands of Orkney are home to fascinating Neolithic monuments and structures which showcase the archaeological remains of prehistoric Europe and have developed a successful tourism industry on the basis of their archaeological heritage.

Strengths and Weaknesses of Indian Destinations compared to the Overseas ones	
Strength	**Weakness**
✓ Owing to the conservation efforts of Archaeological Survey of India (ASI), the monuments have been restored and are open for public viewing. ✓ The destinations are located near to major metropolis having all the adequate amenities..	✓ Lack of adequate infrastructural amenities ✓ Lack of proper connectivity to the destinations ✓ Lack of a clear tourism promotion policy

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Hampi, Fatehpur Sikri	Petra	Heritage (Ancient Cities)	The key features of the tourism promotion strategy for Petra are: • The tourism development strategy for Petra is based on sustainable development, which would attract tourists to the destination and at the same time aid in conservation of the site. • Development of specialized infrastructure for the site which caters to the travelers needs. • The country has undertaken a highly professional marketing campaign which promotes Petra as a unique ancient city with the tagline "a red rose city half as old as time".

Reasons for Comparison: The ancient city complexes of Hampi and Fatepur Sikri are one of the finest examples of Indian architecture and engineering feats through the ages. The ancient city of Petra in Jordan is the only remain of ancient Nabataean civilization and is one of the most fascinating ancient city complexes in the world.

Strengths and Weaknesses of Indian Destinations compared to the Overseas ones	
Strength	**Weakness**
✓ The city complexes have been conserved in the best possible manner owing to the efforts of ASI.	✓ Lack of proper infrastructural amenities (especially at Hampi) ✓ Lack of adequate connectivity to Hampi ✓ Lack of a specific tourism promotion policy

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Dwarka, Mathura, Vrindavan, Varanasi, Rishikesh*, Haridwar	Damascus (Syria)	Religious Tourism	The key features of Religious tourism promotion strategy of Syria, especially for Damascus are as follows: • Create interest in the minds of tourists towards the unique religious heritage of the destinations • Develop a distinct promotional strategy to market religious tourism to the foreign tourists.

Reasons for Comparison: The destinations are primarily places of religious significance for Hindus and have developed a distinct culture owing to their religious heritage. Some of the destinations are also on e of the continuously inhabited cities of the world and are living examples of the evolution of   Indian civilizations through the ages. The city of Damascus is thought to be the one of the continuously inhabited cities in the Mediterranean and has been under the domination of all the major civilizations through the ages. The destination has successfully developed and promotes religious tourism on the strength of its religious heritage.

Strengths and Weaknesses of Indian Destinations compared to the Overseas ones	
Strength	**Weakness**
✓ The destinations are conveniently accessible by variety of modes. ✓ Up gradation of connectivity modes being undertaken.	✓ Lack of infrastructural facilities especially adequate accommodation units ✓ The destinations suffer from congestion, beggar menace and touts' harassment which are all potential deteriorations for tourism ✓ Lack of a defined promotion strategy for religious tourism

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Sarnath, Bodhgaya, Nalanda, Rajgir,	Sri Lanka (Buddhist Temples and Monuments)	Buddhist Circuit/Tourism	The key features of Buddhist tourism promotion strategy of Sri Lanka are: • Incorporate promotion of Buddhist destinations (especially Buddhist temples and monuments) as part of the tourism campaign. . • Create interest in the minds of tourists towards the Buddhist heritage of the country through specialized information packages in its tourism campaign.

Reasons for Comparison: The destinations are important pilgrimage places for Buddhists and visited by Buddhist pilgrims from all over the world. Sri Lanka has a number of temples and monuments which are revered by Buddhists and the country has developed a separate campaign to attract the Buddhist pilgrims.
Strengths and Weaknesses of Indian Destinations compared to the Overseas ones

Strength	Weakness
✓ The destinations enjoy the exclusivity of being associated with the life of Lord Buddha ✓ The destinations are located in close proximity to each other.	✓ Lack of adequate infrastructural facilities ✓ Lack of adequate connectivity modes ✓ Lack of a defined tourism promotion strategy

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Chilika	National Parks of Kenya	Eco-Tourism	The key features of the Eco-tourism promotion strategy adopted by Kenya are: • Formation of a separate promotion council concerned with providing the required support for the development of ecotourism and sustainable tourism. • Involve individuals, community based organizations (CBOs) and corporate organizations in to the council where they can discuss the concept of ecotourism and use this knowledge to improve practices in their respective fields. • Involve the local community of the destination forma trust to spearhead the development of tourism activities in the area. • Develop a distinct promotion and marketing campaign for eco-tourism.

Reasons for Comparison: The Chilika Lake is a wetland of national importance and is famous for its natural resources. The national parks of Kenya are famous for their unique flora and fauna and are the country's main tourism attractions.

Strengths and Weaknesses of Indian Destinations compared to the Overseas ones	
Strength	**Weakness**
✓ Chilika Lake has formed a separate development authority which is responsible for the proper management and protection of the unique eco-system of the wetland. ✓ Presence of adequate infrastructural facilities for tourism development(especially accommodation facilities and recreation options)	✓ Lack of a distinct promotion and marketing campaign ✓ Lack of adequate connectivity modes to the destination

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Rishikesh*	Mount Kinabalu (Malyasia)	Adventure Tourism	The key features of the Adventure tourism promotion strategy adopted by Malaysia for Mount Kinabalu are: • Development of specialized infrastructure for adventure tourism • Create an integrated tourism product based on the adventure activities of the destination • Undertake a highly professional promotional campaign to promote the destination
Reasons for Comparison: Rishikesh is primarily famous due its natural beauty and religious heritage, however in the recent times it has become popular as an adventure sports destination. Mount Kinabalu is popular with tourists for its natural beauty and adventure activities.			
Strengths and Weaknesses of Indian Destinations compared to the Overseas ones			
Strength ✓ Infrastructural facilities available for adventure tourism		**Weakness** ✓ Lack of proper connectivity modes to the destination ✓ Lack of promotion strategy for adventure tourism	

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Agra	Cairo	Culture and Heritage	The key features of the Culture & Heritage tourism promotion strategy adopted by Egypt for Cairo are: • Create an integrated tourism product based on the heritage resources of the destination
Reasons for Comparison: Agra is famous for its cultural heritage and has the Taj Mahal which is considered one of the seven wonders of the modern world and is a UNESCO world heritage site. Cairo is famous worldwide for the great Egyptian Pyramids which are the only remaining wonder among the seven of the wonders of the ancient world.			
Strengths and Weaknesses of Indian Destinations compared to the Overseas ones			
Strength ✓ Enjoys prominence as a major tourist destination in India on the strength of Taj Mahal ✓ Up gradation of infrastructural facilities being undertaken ✓ Destination accessible by variety of modes		**Weakness** ✓ Lack of a integrated tourism product for the destination ✓ Lack of will to innovate new products/promotion campaigns for the destination.	

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Puri	Istanbul	Cultural Heritage and Natural Resources	The key features of the tourism promotion strategy adopted by Istanbul are: • Create a unique tourism product based on the strength of the cultural and natural resources of the destination • Undertake a highly professional marketing campaign which promotes Istanbul as a culturally rich city having a unique geographical location with the tagline "let's meet where the continents meet".

Reasons for Comparison: Puri is one of the most visited destinations in eastern India owing to its cultural heritage and natural beauty. Istanbul is one of the most fascinating destinations owing to its cultural heritage and unique geography; the western portion of Istanbul is in Europe, while the eastern portion is in Asia. It is also rich in natural beauty, having a a large natural harbor.

Strengths and Weaknesses of Indian Destinations compared to the Overseas ones	
Strength	**Weakness**
✓ Enjoys prominence as a major tourist destination in eastern India on the strength of Jagannath temple ✓ The destination is rich in secondary tourism resources (such as shopping, fairs and festivals, etc.)	✓ Lack of a defined image for promoting the destination internationally ✓ Lack of adequate infrastructural amenities especially accommodation units ✓ Connectivity modes to the destination are limited

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Churches and Cathedrals of Goa	Macau	Heritage	The key features of the Heritage tourism promotion strategy adopted by Macau are: • The tourism strategy has laid emphasis on infrastructure development at the sites and conservation of the unique heritage for tourism development. • The country has created an integrated tourism promotion campaign which is based on the unique heritage of Macau.

Reasons for Comparison: The cathedrals and churches of Goa are a showcase of its Portuguese heritage and one of the major attractions of the destination. Macau also has a history of being a Portuguese colony prior to independence and its colonial past is reflected in its churches and heritage monuments.

Strengths and Weaknesses of Indian Destinations compared to the Overseas ones	
Strength	**Weakness**
✓ The Churches and Cathedrals have been preserved and restored to their original glory ✓ The destination is connected by a variety of modes. ✓ Infrastructural facilities are being continuously upgraded. ✓ Higher percentage of English speaking population than Macau	✓ Lack of clear promotion strategy and campaign for heritage tourism

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Ajmer	Vatican City	Religious Tourism	The key features of the Religious tourism promotion strategy adopted by Vatican City are: • Create interest in the minds of tourists towards the unique religious heritage of the destination • Develop a religious tourism promotion strategy specific to the destination

Reasons for Comparison: Ajmer is home to one of the holiest Muslim shrines in south Asia, the Dargah of Khwaja sahib. The Dargah is open to pilgrims of all religions. The city also has a number of other religious attractions. The Vatican City is the religious centre of roman catholic church and is visited by pilgrims from all over the world. The Vatican is open to people of all religions and is a major tourist destination.

Strengths and Weaknesses of Indian Destinations compared to the Overseas ones	
Strength	**Weakness**
✓ The destination enjoys prominence as an important Muslim pilgrimage of South Asia.	✓ Lack of adequate infrastructural facilities ✓ Lack of choice of connectivity modes to the destination ✓ The destination especially the Dargah area is highly congested ✓ The Dargah area is plagued by problems of touts' harassment and beggar menace.

Destination	Comparable Destination abroad	Product/ Concept promoted by the Overseas Destination	Promotion Strategy adopted by the Overseas Destination
Bhubaneshwar	Bangkok	MICE Tourism with Culture & Heritage	The key features of the tourism promotion strategy adopted by Thailand for Bangkok are: • Undertake a highly professional promotional campaign differentiating itself from other destinations having similar background • Create an integrated tourism product based on the resources of the destination

Reasons for Comparison: Bhubaneshwar is the capital of Orissa and has a distinct cultural heritage. The city has the potential to be a major MICE destination in the country Bangkok is a major tourist destination in Southeast Asia and attracts tourists on the strength of Culture & Heritage and MICE Tourism

Strengths and Weaknesses of Indian Destinations compared to the Overseas ones	
Strength	**Weakness**
✓ Bhubaneshwar has witnessed major economic and commercial activities in recent times ✓ New modes of transport making headway ✓ Higher percentage of English speaking population compared to Bangkok	✓ Lack of a defined image for promoting the destination internationally. ✓ Lack of a tourism promotion strategy and campaign ✓ Lack of adequate infrastructural facilities to handle MICE tourism

11.3. Theme that can be woven round the destination/ circuit

Considering the prime features of the various locations, their strengths as well as weaknesses, a possible theme that can be woven round the destinations/ circuit has been conceived off. The same has been highlighted in the table below:-

Destination/ Circuit	Themes that can be woven around the Circuit
Agra – Fatehpur Sikri – Mathura – Vrindavan	India through the ages
Ajmer	An oasis of secularism
Badami – Halebeid – Aihole	Gateway to ancient Dravidian heritage
Bodhgaya – Nalanda – Rajgir	Pathway to Nirvana
Delhi	Modernity marries history
Dwarka	Where God is King
Churches of Goa	A peek into Portuguese past
Hampi	Magical saga of rocks
Charminar area of Hyderabad	Façade of glorious past
Jagdalpur-Tirathgarh-Chitrakote-Barsoo	A quest with nature
Jagannath Puri – Bhubaneshwar – Konark – Chilika	Sun, Sand and Life
Mahabalipuram	Where nature meets architecture
Rishikesh – Haridwar	Enthralling trail of the Ganges
Varanasi – Sarnath	Confluence of Religions
Elephanta Caves	Island of ancient art

11.4. Product to be developed and infrastructure requirement

Considering the current resources as well as infrastructural amenities available and the themes considered, it is recommended that the following products be developed at the various earmarked destinations/ circuits. These products would not only add value to the location but would also help considerably in promoting India as a prime tourist destination. The infrastructure requirement for developing those products have also been indicated herein.

Destination/ Circuit	Products to be developed	Infrastructure Requirement
Agra – Fatehpur Sikri – Mathura – Vrindavan	✓ Indo - Islamic Concept Village at Fatehpur - Sikri	➢ Land area of approx. 10 acres ➢ Exhibition Hall depicting history of Mughal legacy and role of Agra & Fatehpur Sikri ➢ Commercial plaza containing handicraft shops, food courts containing the flavour of mughlai cuisines ➢ Open air auditorium to host cultural shows
	✓ Develop a guided Braj Holi tour of Mathura-Vrindavan	➢ Expert guides having knowledge in both Braj culture and foreign languages
	✓ Entertainment show on Braj culture at Mathura/ Vrindavan	➢ An auditorium with a seat capacity of 200+ ➢ A 70 mm screen and world class surround sound facility

Destination/ Circuit	Products to be developed	Infrastructure Requirement
Ajmer	✓ Developing an enclave around the shrine	➢ Broadening approach to the shrine ➢ Developing a prominent gateway ➢ Zoning regulation of shops – separate zones for shops selling articles of worship, gift items, food etc. ➢ An office complex, where intending tourists can avail guided tours at a reasonable cost ➢ An exhibition hall, wherein the history of shrine, its' importance across ages and miracles can be showcased. ➢ Stepping up security aspects, forbidding beggars from disturbing visitors/ pilgrims.
Badami – Halebeid – Aihole	✓ Develop a triangle including the three destinations	➢ Upgrade connectivity of the destinations ➢ Dedicated AC bus services (2 nos.) and guided tours ➢ Information centre including an auditorium with seat capacity of 50 which showcases the legacy of Chalukya and Hoysala empires
Bodhgaya – Nalanda – Rajgir	✓ Develop a golden triangle including the destinations	➢ Meditation centre at Bodhgaya ➢ An exhibition hall, wherein the history of Nalanda, its' importance across geographies can be showcased. ➢ Naturopathic Healing centre at Rajgir involving the hot springs

Destination/ Circuit	Products to be developed	Infrastructure Requirement
Delhi	✓ Developing Urban Haat in the eastern and western parts of the city	➢ Land area ➢ Develop support facilities such as shops., food courts, public conveniences, etc.
	✓ Developing Heritage corridor in the Walled City	➢ Clear congestion in the walled city area ➢ Develop a corridor involving Chandni Chowk, Jama Masjid and Red Fort ➢ Developing underground hassle – free connectivity between central Delhi and the proposed corridor ➢ Develop heritage theme for the walled area involving street furniture (signage, lightings, etc.) ➢ Develop an auditorium with seat capacity of 100 which showcases the evolution of the walled city area through the ages and its USP in the current scenario
Dwarka	✓ Develop specialized boat cruise to Bet Dwarka as well as ancient underwater heritage sites	➢ Dedicated AC bus services to the Dwarka harbor ➢ Develop an exclusive dock area with amenities like coffee shops, AC lounges ➢ Provision of guides having knowledge of Dwarka's history and proficient in foreign languages for the cruise
Churches of Goa	✓ Develop specialized heritage tour involving churches & cathedrals	➢ Specialized AC Buses with knowledgeable guides having ability to speak in French, Portuguese and Spanish ➢ A revenue sharing arrangement to be organized with the cathedrals, which is to be used for their upkeep/ maintenance.
Hampi	✓ Aerial tour of Hampi through Hot Air Balloons	➢ Develop dedicated landing and take off spots ➢ Provision of an information cum regulation centre for the ballooning activities
	✓ River Cruise in traditional boats	➢ Development of a river dock ➢ Provision of Traditional Boats (Coracles)
	✓ Light and sound show	➢ Open air auditorium with light and sound facilities

Destination/ Circuit	Products to be developed	Infrastructure Requirement
Charminar area of Hyderabad	✓ Developing heritage / cultural enclave in the area	➢ Clear congestion in the area ➢ Develop heritage theme for the area involving street furniture (signage, lightings, etc.) ➢ An exhibition hall, wherein the history of the monument, its' place in the Nizam culture and its significance as the landmark of the city is showcased
Jagdalpur-Tirathgarh-Chitrakote-Barsoo	✓ Developing the circuit as a tribal tourism destination	➢ Provide accommodation facilities for nature camps ➢ Develop stay home facilities with the tribes ➢ Provision of trained guides (preferably local tribals) having knowledge of the local terrain, culture and traditions as well as proficient in English
Jagannath Puri – Bhubaneshwar – Konark – Chilika	✓ Ayurvedic Centre at Puri	➢ Up gradation of Airport to International Standards ➢ Land area ➢ Qualified personnel ➢ Requisite infrastructure
	✓ Water sports at Konark	➢ Parasailing and water scooters ➢ Safety gears and regulatory personnel
	✓ Snorkeling at Chilika	➢ Snorkeling gears and regulatory personnel
Mahabalipuram	✓ Develop heritage tour with USP of the beachfront	➢ Develop an enclave including the beachfront and the monuments ➢ Develop food courts specializing in traditional cuisine ➢ Specialized infrastructure for tourism enhancement (inclusive of on site support facilities like office complex, public conveniences, transportation amenities, heritage walks)

Destination/ Circuit	Products to be developed	Infrastructure Requirement
Rishikesh – Haridwar	✓ Peace retreat at Haridwar/ Rishikesh	➢ Land area ➢ Meditation centre, living quarters, organic gardens and kitchens
	✓ Bungee jumping at Rishikesh	➢ Safety gear and regulatory personnel ➢ Recreation facilities in terms of food and first aid facilities
	✓ Hot air ballooning at Rishikesh, Haridwar	➢ Develop dedicated landing and take off spots ➢ Provision of an information cum regulation centre for the ballooning activities
	✓ Organize white water rafting competitions at Rishikesh	➢ Initiate measures including infrastructure provision, financial support for the product
Varanasi – Sarnath	✓ Develop integrated tour for Varanasi & Sarnath	➢ Specialized AC Buses with knowledgeable guides having ability to speak in Japanese, Korean and English
	✓ Specialized Boat Tours at Varanasi showcasing Ghats	➢ Provision of traditional boats equipped with specialized infrastructure like display/audio facilities ➢ Develop an exclusive dock area with amenities like AC lounges, traditional food haats and craft items ➢ Provision of guides having knowledge of the ghats' history and proficient in foreign languages for the tour
Elephanta Caves	✓ Developing infrastructure for night tours	➢ Provision of illumination facilities for night time viewing ➢ Develop an exclusive dock area with amenities like food haats and souvenir shops

11.5.   **Target markets**

The following markets can be targeted for the different destinations/ circuits. Strong focus shall have to be provided for the following target markets / destinations in order to reap rich dividends visiting foreign tourists. It is recommended that these locations be taken up first and a progressive campaign be launched highlighting the USP's/ Themes of the destination/ circuit, to achieve best results. Each target market has been chosen based on the arrival trends of foreign tourists to these locations as understood during site visits, interaction with tour operators and travel industry experts in those locations.

Destination/ Circuit	Target markets for destinations
Agra – Fatehpur Sikri – Mathura – Vrindavan	➢ Europe ➢ North America ➢ South East Asia
Ajmer	➢ Mediterranean Countries ➢ Middle East
Badami – Halebeid – Aihole	➢ Europe ➢ North America ➢ Australia
Bodhgaya – Nalanda – Rajgir	➢ Japan ➢ Sri Lanka ➢ Thailand ➢ Korea ➢ Other South East Asian countries
Delhi	➢ Europe ➢ North America ➢ Australia
Dwarka	➢ Europe ➢ North America ➢ Israel
Churches of Goa	➢ Europe ➢ North America ➢ Australia ➢ Oceania
Hampi	➢ Europe ➢ North America
Charminar area of Hyderabad	➢ Middle East ➢ Europe
Jagdalpur-Tirathgarh-Chitrakote-Barsoo	➢ Europe ➢ North America
Jagannath Puri – Bhubaneshwar – Konark – Chilika	➢ Europe ➢ North America ➢ South East Asia
Mahabalipuram	➢ Europe ➢ North America

Destination/ Circuit	Target markets for destinations
Rishikesh – Haridwar	➢ Europe ➢ North America
Varanasi – Sarnath	➢ Europe ➢ North America
Elephanta Caves	➢ Europe ➢ North America

11.6.   **Marketing strategy**

An overview of the marketing strategy that can be adopted for marketing the top 15 destinations is as indicated below.

Task 1:- Form a separate panel comprising of representatives of Ministry of Tourism, State Tourism Department, Head of Civic bodies of the location

Task 2: Brainstorming amongst the panel members to develop special promotional events to attract foreign tourists and boost revenues significantly from the recommended products

Task 3:- Preparation of presentations/ short films showcasing the location, it's USP / Theme, available hospitality amenities

Task 4:-Motivating the airlines to incorporate features about the destinations in their in-flight magazines, beaming films as a part of their in-flight entertainment in their international flights

Task 5:-Motivating the Travel writers / journalists to write features about the location

Task 6:-Develop incentive based programs for the Travel Agents/ Tour Operators for promoting the destinations and motivating to the foreign tourists to visit the same

Task 7:- Participation of elected panel members in overseas travel shows/ travel marts and conventions about these locations

Task 8:-Utilising India tourism offices overseas to proactively participate in awareness campaigns involving the destinations with its new theme

12.1.   Overview

The Chapter intends to present the projected traffic flow, revenue potential as well as costing estimates based on the recommended products/ infrastructure enhancement for the destinations.

12.2.   Traffic Estimates

The estimated foreign tourist traffic flow to the different locations have been arrived at considering information collated from State Tourism authorities/ Tour operators and has been substantiated from the different circles of ASI, which runs a ticketing facility at majority of the locations considered. In certain areas, data collected during the previous studies commissioned by Ministry of Tourism (e.g. Collection of Domestic Tourism Statistics in states of Rajasthan, Uttar Pradesh, Uttaranchal, Orissa and Karnataka) has also been taken into account. Projections have been made on the basis of periodicity of product development (gestation period for developing a product/ infrastructure) for the destinations. It has been assumed that the foreign tourist traffic flow would grow as per existing rates till the year of gestation viz. 2010 and then start growing at an increased pace in the following years (Considering marketing initiatives as well as infrastructure enhancement has been provided for the destinations). The foreign tourist traffic estimates till the year 2012 has been provided below.

Destination/ Circuit	Projected Tourist Traffic (in nos.)					
	2007	**2008**	**2009**	**2010**	**2011**	**2012**
Agra – Fatehpur Sikri – Mathura – Vrindavan	70365	74587	79063	85388	92219	101441
Ajmer	70304	73116	76041	79082	82246	87180
Badami – Halebeid – Aihole	50785	51800	52836	54950	57148	60005
Bodhgaya – Nalanda – Rajgir	62201	64689	67277	70640	74172	79364
Delhi	1050070	1102573	1157702	1296626	1452221	1655532
Dwarka	40004	40805	41621	42869	44155	46363
Churches of Goa	64635	65928	68565	71993	75593	79372
Hampi	45451	45905	46823	47760	48715	49689
Charminar area of Hyderabad	26894	27701	28532	29388	30269	31783
Jagdalpur-Tirathgarh-Chitrakote-Barsoo	10752	10859	10968	11297	11636	11985
Jagannath Puri – Bhubaneshwar – Konark – Chilika	36205	37291	38410	40331	42751	45743
Mahabalipuram	30603	30909	31218	31842	32479	33129
Rishikesh – Haridwar	44100	46305	49083	52028	55150	58459
Varanasi – Sarnath	72903	75819	78852	82795	86935	91281
Elephanta Caves	86779	88515	91170	93905	96723	99624

12.3.   Revenue potential estimates

The basis of arriving at the revenue potential of different locations have been:-

➢   the estimated tourist traffic flow, as indicated above

➢   estimated revenue that can be generated from the recommended products at different locations.

The following table elucidates the projected revenue estimates for the individual destinations for the years 2010 and 2012.

Destination/ Circuit	Projected Revenue Estimates (in Rs. Crs>)	
	2010	**2012**
Agra – Fatehpur Sikri – Mathura – Vrindavan	5.1	5.5
Ajmer	4.7	4.9
Badami – Halebeid – Aihole	3.3	3.4
Bodhgaya – Nalanda – Rajgir	4.2	4.5
Delhi	77.8	87.1
Dwarka	2.6	2.6
Churches of Goa	4.3	4.5
Hampi	2.9	2.9
Charminar area of Hyderabad	1.8	1.8
Jagdalpur-Tirathgarh-Chitrakote-Barsoo	0.7	0.7
Jagannath Puri – Bhubaneshwar – Konark – Chilika	2.4	2.6
Mahabalipuram	1.9	1.9
Rishikesh – Haridwar	3.1	3.3
Varanasi – Sarnath	5.0	5.2
Elephanta Caves	5.6	5.8

12.4. Broad level costing Estimates

The costing estimates have been arrived upon on the basis of product development as well as infrastructure upgradation requirements for the individual destinations at a broad level. The estimated figure excludes the land, administrative and other procedural costs for implementation of the projects. For arriving at accurate costs a detailed Techno – Economic Feasibility Study has to be undertaken as a separate exercise.

Destination/ Circuit	Products to be developed	Approx. Costing Estimates
Agra – Fatehpur Sikri – Mathura – Vrindavan	✓ Indo - Islamic Concept Village at Fatehpur – Sikri	➢ Rs. 7 Crs
	✓ Develop a guided Braj Holi tour of Mathura-Vrindavan	➢ Rs. 15 Lakhs
	✓ Entertainment show on Braj culture at Mathura/ Vrindavan	➢ Rs. 2 Crs
Ajmer	✓ Developing an enclave around the shrine	➢ Rs. 10 Crs
Badami – Halebeid – Aihole	✓ Develop a triangle including the three destinations	➢ Rs. 2 Crs
Bodhgaya – Nalanda – Rajgir	✓ Develop a golden triangle including the destinations	➢ Rs. 3 Crs
Delhi	✓ Developing Urban Haat in the eastern and western parts of the city	➢ Rs. 2
	✓ Developing Heritage corridor in the Walled City	➢ Rs. 25 Crs
Dwarka	✓ Develop specialized boat cruise to Bet Dwarka as well as ancient underwater heritage sites	➢ 5.52 Crs
Churches of Goa	✓ Develop specialized heritage tour involving churches & cathedrals	➢ 1 Crs

Destination/ Circuit	Products to be developed	Approx. Costing Estimates
Hampi	✓ Aerial tour of Hampi through Hot Air Balloons	➢ Rs. 75 Lakhs
	✓ River Cruise in traditional boats	➢ Rs. 40 Lakhs
	✓ Light and sound show	➢ Rs. 50 Lakhs
Charminar area of Hyderabad	✓ Developing heritage / cultural enclave in the area	➢ Rs. 20 Crs
Jagdalpur-Tirathgarh-Chitrakote-Barsoo	✓ Developing the circuit as a tribal tourism destination	➢ Rs. 55 Lakhs
Jagannath Puri – Bhubaneshwar – Konark – Chilika	✓ Ayurvedic Centre at Puri	➢ Rs. 2 Crs
	✓ Water sports at Konark	➢ Rs. 55 Lakhs
	✓ Snorkeling at Chilika	➢ Rs. 25 Lakhs
Mahabalipuram	✓ Develop heritage tour with USP of the beachfront	➢ Rs. 2 Crs
Rishikesh – Haridwar	✓ Peace retreat at Haridwar/ Rishikesh	➢ Rs. 2.5 Crs
	✓ Bungee jumping at Rishikesh	➢ Rs. 10 Lakhs
	✓ Hot air ballooning at Rishikesh, Haridwar	➢ Rs. 50 Lakhs
	✓ Organize white water rafting competitions at Rishikesh	➢ Rs. 25 Lakhs
Varanasi – Sarnath	✓ Develop integrated tour for Varanasi & Sarnath	➢ Rs. 1 Crs
	✓ Specialized Boat Tours at Varanasi showcasing Ghats	➢ Rs. 2.2 Crs
Elephanta Caves	✓ Developing infrastructure for night tours	➢ Rs. 7 Crs

12.5. Investment Recommendations

The investment requirements for product development and infrastructure enhancement at the destinations are enormous and cannot be possibly met by government agencies alone. The government can involve the private sector to invest in tourism development in various ways. An overview of the possible investment sources for the products have been identified below. A separate detailed project report needs to be carried out to identify the possible investment sources for individual product development at each destination.

- The destinations which have urban tourism product development (such as Indo - Islamic Concept Village at Fatehpur – Sikri, Developing Heritage corridor in the Walled City of Delhi) projects can opt for investment support (in the form of loans) from international funding agencies such as ADB, World Bank and other ILFS..

- Investment for product development of Buddhist destinations/circuits can be sourced from various international Buddhist trusts/organizations (e.g. Japan, Korea)

- Corporate sponsorship for monuments protection and market development campaigns (in the form of advertisements)