Department Of Tourism

Ministry of Tourism, Art and Culture-

Government of India

20 Year Perspective Plan for Sustainable Tourism in Rajasthan

• • • • • •

Final Report

Prepared By
A. F. Ferguson & Co.

DEPARTMENT OF TOURISM
MINISTRY OF TOURISM, ART AND CULTURE-GOVERNMENT OF INDIA

STUDY ON 20 YEAR PERSPECTIVE PLAN FOR SUSTAINABLE TOURISM IN RAJASTHAN

-FINAL REPORT

CHAPTER **CONTENTS**

APPENDIX (NUMBERED CHAPTER-WISE)

CHAPTER 1 :

INTRODUCTION

1.1.1 A F Ferguson & Co. (AFF) has been awarded a consulting study for "Preparation of 20 Years' Perspective Plan" for the Tourism sector in Rajasthan by the Ministry of Tourism, Govt. of India. This report is the final report based on the findings of the study and incorporates the changes suggested by the clients on the earlier Draft Report.

1.2 BACKGROUND TO THE STUDY

1.2.1 The Government of India has initiated a project whereby it will formulate a road map plan to identify the tourism prospects of all the states. This will be done by the way of a 20-year perspective plan, which will analyse the strengths, weaknesses, opportunities and threats for tourism in each state and will also forecast the growth in terms of tourist traffic.

1.2.2 A. F. Ferguson & Co. have been invited, by Ministry of Tourism, Culture and Art- Department of Tourism, to assess the tourism scenario in Rajasthan and to suggest appropriate tourism projects and roles of various parties (government and non-government) in implementing the same.

1.3 TERMS OF REFERENCE/ DELIVERABLES FOR THE STUDY

1.3.1 The guidelines for preparation of the 20-year Perspective Plan as stipulated by the client are given in Appendix 1A and B. Based on the guidelines, the terms of reference and the deliverables agreed upon for the study are as follows:

Existing Status

- To evaluate the status of the existing plans and schemes
- To list and evaluate existing potential tourist destinations and their classification into standalone destinations/ circuits
- To assess the status of existing infrastructure broken up according to various departments
- To analyse current traffic flows to the major destinations and assess the ability of the destinations to manage the traffic
- To identify likely infrastructure requirements and the indicative cost of developing the infrastructure
- To assess the institutional mechanisms for tourism development in the State

New Projects

- To identify existing and new tourism projects in the major destinations including an outline feasibility of these projects and prioritisation of these on the basis of income and employment potential including the development of cultural centres, handicraft shops, health resorts; aggregate investments and their phasing

- To prepare an action plan for implementation of these projects

Benefits

- To broadly estimate potential for employment generation from these projects over the plan period including women and local artistes
- To project tourist arrivals and visitors to the major tourist destinations

Framework

- To suggest various options for funding and for private sector investment in tourism projects
- To broadly assess the environmental issues associated with tourism projects
- To provide broad recommendations for privatisation of tourism properties owned by State Government/ Government owned companies

Specific Additional Aspects to be covered (based on the DoT Guidelines

(i) A perspective plan with a time frame of 20 years needs to be developed for developing sustainable tourism giving year-wise phasing of investment having regard to the resources available. Department of Tourism shall provide Central financial assistance for this purpose subject to the maximum of Rs. 20.00 Lakhs

(ii) The plan should indicate short-term and long-term plans, targets and ground realities.

(xxv) Consultant preparing the perspective plan should be asked to given an executive summary of the plan along with the report.

1.4 METHODOLOGY FOR THE STUDY

1.4.1 AFF followed a combination of primary survey and secondary desk research for the present study. Our methodology for the study was divided into three phases:

- **Phase I**: Understanding the existing tourism scenario
- **Phase II**: Analyzing and identifying the potential for tourism in existing and other new sites
- **Phase III**: Identifying tourism related projects and broadly evaluating them on their income and employment generating potential and their environment sensitivity

Understanding the Existing Tourism Scenario

1.4.2 In phase I, AFF studied the existing tourism scenario in the India and abroad, and specifically in Rajasthan.

Secondary Research

1.4.3 The secondary desk involved a study of various publications of Rajasthan Economic and Statistics Cell, Rajasthan DoT, PWD and others and was concentrated to develop an understanding of the following:

Overall Understanding of Rajasthan State

1.4.4 This involved a study of the basic/ fundamental characteristics of Rajasthan State such as its history, geography, government, administrative divisions/ districts, demographics, economy, socio-economic infrastructure, etc. through various published literatures and the Internet.

Understanding of the Tourism Sector in Rajasthan

1.4.5 This involved a brief review of the Rajasthan state tourism scenario, the state's tourism policy and understanding the various development initiatives for tourism in the state till date. It also identified the various tourist circuits in the state and has also conducted a brief review of these circuits in terms of locations covered under them, attractions (such as places- forts, palaces, havelis, lakes, etc. activities/ events- adventure, leisure, etc. heritage- art, culture, craft, etc.), tourist traffic (domestic/ foreign), seasonality, direct tourist infrastructure (hotels and restaurants, etc.), and others.

Primary Meetings

1.4.6 AFF also had discussions with Rajasthan Department of Tourism (DoT) officials, PWD, Rajasthan Forest and Wildlife department, and others, and with tourism industry participants such as hoteliers, tour operators, guides, and local community to seek their opinion on various tourism related issues in the state. Exhibit 1.1 provides the list of departments, associations, organisations and other parties met during the study.

Exhibit 1.1

Main Organisations Contacted

Central Agencies
- Department of Tourism, Delhi

State Agencies
- Department of Tourism, Rajasthan (Jaipur)
- Rajasthan Tourism Development Corporation
- Regional Offices of DoT, Rajasthan at Udaipur and Bikaner
- Tourist Reception Centres of DoT across the state
- Rajasthan Chamber of Commerce and Industry
- Udaipur Chamber of Commerce and Industry
- Bureau of Investment Promotion
- Public Works Department
- Department of Forest and Wildlife
- PDCOR
- Hotel Association of Jaipur
- Hotel Federation of Rajasthan
- Guides Association of Rajasthan

Private Organisations/ Tour Operators/ Hotels
- Rajasthan Travel Service, Jaipur, Jodhpur and Jaisalmer
- HRH Group of Hotels, Gajner
- WelcomHeritage Group, Bikaner
- Sariska Palace, Sariska
- Jaipur House, Mount Abu
- Jagat Niwas Hotel, Udaipur
- Others

1.4.7 The focus of these primary meetings was as follows:

- Understanding the state government's various activities and initiatives for developing tourism in the state
- Collect data, reports, information brochures, publications, news letters and other documents related to tourism (traffic, infrastructure, developmental plans, etc) in Rajasthan
- Understand issues related to tourism activities and the support infrastructure available in the state
- Understand tourist traffic trends, inadequacies in tourism infrastructure and services, expectations, etc.
- Understand national and international trends in tourism and their likely impact on tourism in Rajasthan

1.4.8 AFF also visited main tourist locations in the state such as Jaipur, Jodhpur, Udaipur, Mount Abu, Ajmer-Pushkar, Jaisalmer, Bikaner, Shekhawati, Alwar-Sariska, Bharatpur and others such as Samode, Osiyan, Ranakpur, Kumbhalgarh, Jaisamand, Sam, Gajner, Siliserh, Abhaneri, etc. to study the tourism potential of these places in terms of attractions, current infrastructure availability, etc. During these visits AFF also had talks with local officials and industry participants to understand the key tourism related issues in the region.

<u>Analysis of Tourism Potential in the State</u>

1.4.9 Based on our understanding of the existing tourism scenario, existing and planned infrastructure in the state from the primary and secondary survey, AFF assessed the potential for tourism at the existing tourist locations based on tourist flow at the locations, broad review of capacity to handle the tourist traffic, the options for differentiating product to enhance tourist flow and the opportunity to expand/ augment, upgrade facilities and services to attract and handle additional traffic.

1.4.10 AFF also identified the potential of the state in offering facilities for performance by local artists, cultural troupes, cultural complexes and theme parks, handicraft shops at various tourist places, health resorts at/ near the tourist places, yoga classes, nature cure facilities, ayurvedic system of medicines etc. to attract tourists.

1.4.11 The various options for tourism development were then evaluated based on various qualitative and quantitative parameters such as:

- Existing infrastructure in terms of accessibility by road, air etc and additional infrastructure required
- Expected number of tourists and the resultant revenues
- Indicative cost of the projects
- Employment Generation and development of region
- Environmental impact – on a macro level

<u>Strategic Action Plan for Sustainable Tourism Development</u>

1.4.12 Based on the final list of existing and potential sites/ projects, the gaps in infrastructure were identified and the likely investment for development of infrastructure requirement was assessed. This investment requirement was classified under different heads and prioritized by drawing up phased investment plan covering the next 20 years.

1.4.13 The phased investment assessment was used to explore broadly the various options for sourcing of required funds from different agencies such as central/ state government, loans from financial institutions, tourism finance corporation and from private sector. The various infrastructure requirements were split up among different departments such as PWD, forests, culture etc. so that the activities to be undertaken by different agencies are explicitly understood. A broad strategy for private sector involvement and privitisation of existing properties was also prepared.

1.4.14 The strategic action plan was thus prepared identifying the broad focus areas for Rajasthan tourism and the actions required in each of them. These areas include creation of new circuits/ destinations, creation of new tourism products, tourism as a vehicle for area development, creation of tourism related direct infrastructure, exploring opportunities to increase tourism revenues and tourism marketing.

Limitations of the Study

1.4.15 The findings of the study are based on the information supplied by various departments contacted during the study. Very little information is available on the size of tourism economy and the present employment levels in the tourism industry.

1.4.16 Broad assumptions are made for investments in tourism projects.

1.5 STRUCTURE OF THE REPORT

- **Chapter 1: Introduction**

This chapter will include background to the study, terms of reference, AFF's approach and methodology and structure of the report.

- **Chapter 2: Executive Summary**

- **Chapter 3: Overview of Rajasthan State**

This chapter will cover the history and background of Rajasthan, its major economic sectors, administrative divisions and districts profile, major towns profile, infrastructure in the state, major initiatives and incentives of the state government, etc.

- **Chapter 4: Overview of Existing Tourism Scenario in Rajasthan**

This chapter will cover background of tourism in Rajasthan, tourism destinations and circuits, tourist traffic, tourism related state government plans and incentives, RTDC activities, etc.

- **Chapter 5: Existing Direct Tourism Infrastructure and Major Tourism Plans and Schemes**

This chapter will cover overview of direct tourism infrastructure such as hotels / RTDC accommodation, tourist offices, midway and wayside facilities, transport infrastructure, etc. It will also cover existing and on-going major tourism projects, plans and schemes in the state.

- **Chapter 6: Tourist Circuit/ Location-wise: Existing Status, Ongoing and Proposed Projects**

This chapter will include overview of the tourism circuits in terms of background, history, geography, climate and tourist seasons, major tourist spots, attractions and tourist profiles, travel links and deficiencies, tourist traffic trends and forecast, direct and indirect infrastructure and new / potential areas for development in the circuit.

- **Chapter 7: Forecast of Future Tourist Traffic**

This chapter will include past trends in tourist traffic, brief methodology for 20-year forecast of tourist traffic and summary of tourist traffic forecast.

- **Chapter 8: New Tourism Projects in Rajasthan: Investment and Phasing**

This chapter will cover a summary of new tourism projects, for each specific new / on-going project investment required and their phasing, and likely investor

- **Chapter 9: Tourism Projects: Employment Opportunities and Environmental Issues**

This chapter will include summary of employment potential, employment potential for women and artisans, current legislation related to environment, environmental sensitivity of tourism areas and of proposed tourism projects, and suggested environmental controls for tourism projects in Rajasthan.

- **Chapter 10: Funding of Tourism Projects, Role of Private Sector and Recent Privatisation Initiatives**

This chapter will review the current role of private sector investment in tourism and the incentives available to them. It will also identify future avenues for private funding (corporates, individuals, NGOs, etc.) and the phasing for the same. This chapter will also review the current tourism assets and properties, recent efforts at privatization and the learning therein, identification of property categories for privatization and recommendations for implementation of privatization.

- **Chapter 11: Institutional Framework for Tourism Development**

This chapter will include review of existing institutional framework, issues and deficiencies related to existing framework, evaluation of alternative institutional framework / models and recommendations.

- **Chapter 12: Strategic Action Plan for Tourism Development**

This chapter will cover an action plan for tourism development in Rajasthan for the plan period.

CHAPTER 2 :

EXECUTIVE SUMMARY

2.1.1 This chapter provides a summary of the findings of the study with respect to development of tourism in Rajasthan, deficiencies that exist as well as the investment required for various tourism related infrastructure by the year 2021.

2.2 OVERVIEW OF TOURISM IN RAJASTHAN

2.2.1 Rajasthan has emerged as one of the popular tourist destinations in India for both domestic and foreign tourists. The number of tourist arrivals in the state has increased four fold in the last thirty years and in 2001, the state received 0.6 Mn foreign tourist and over 7 Mn domestic tourists.

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

2.2.3 Four decades ago tourism in Rajasthan was small industry that was largely confined to the elite foreign tourists and domestic pilgrim traffic. Tourist arrivals were restricted to a few thousand tourists annually and were primarily recorded in select places such as Jaipur, the state capital, Udaipur and Jodhpur (for foreign tourists) and the pilgrim centres of Ajmer, Pushkar and Nathdwara (for domestic tourists). The employment in the sector and the sector’s contribution to the state economy, as well as employment potential were limited.

2.2.4 However, over the last few decades, due to the focussed efforts of Rajasthan Tourism, various State Government agencies, select entrepreneurs / individuals, tourism has grown from an elite and pilgrim phenomenon to a mass phenomenon putting Rajasthan firmly on the foreign and domestic tourist map. Also, as compared to the past, where the tourism in the state meant desert tourism, heritage tourism (forts, palaces, etc.) and pilgrim tourism, today the tourists have a wide canvas of places, attractions and activities to choose from in the state, which enhances the overall tourism experience.

2.2.5 The industry today employs over one lakh people directly and over three lakh people indirectly. Its contribution to the State economy is estimated to be over Rs 2000 Cr. presently. Given the increasingly important role that the sector plays in the overall socio-economic development of the state, the State Government of Rajasthan has accorded an industry status to tourism from the year 1989.

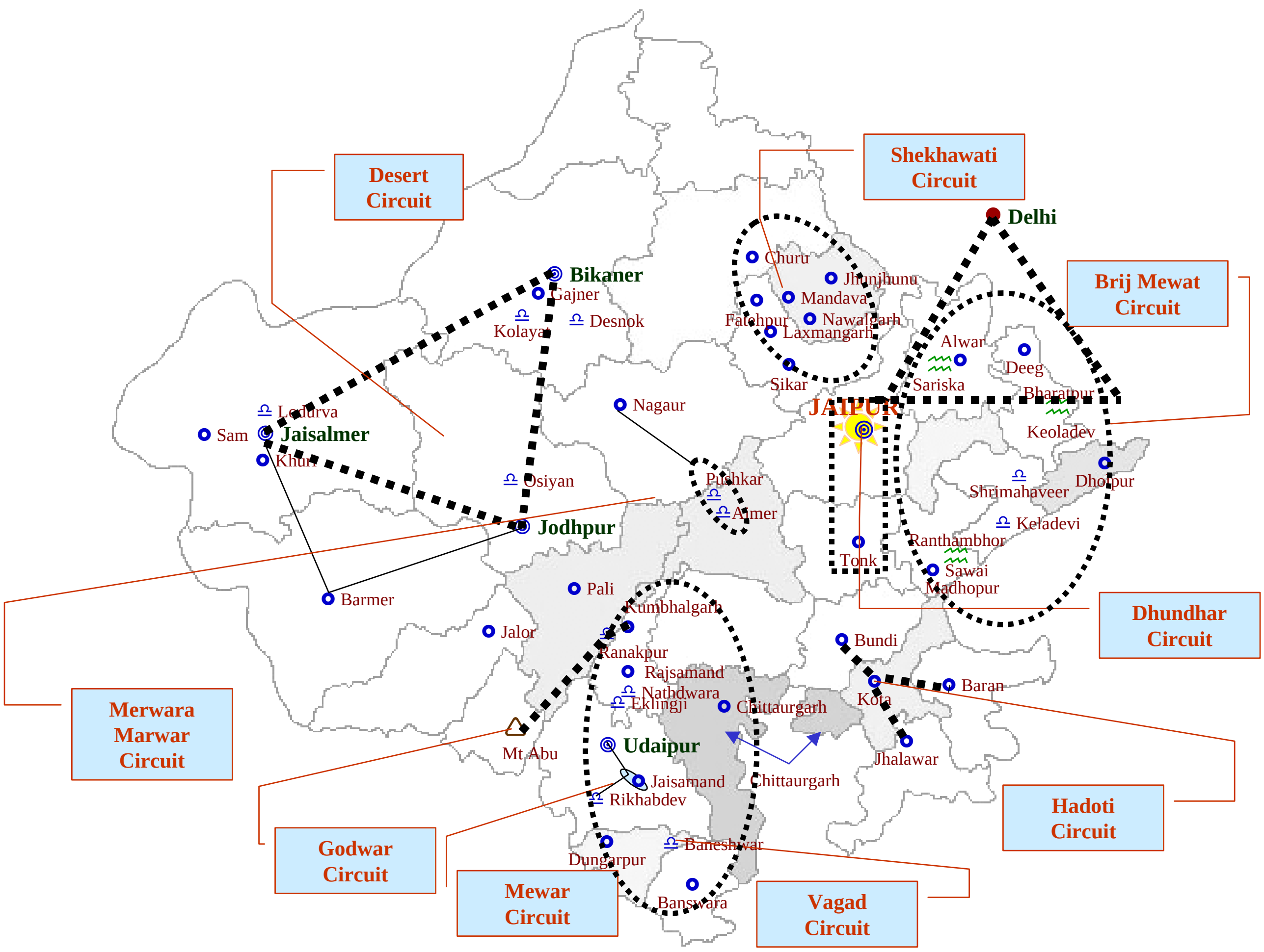
2.2.6 As the nodal agency to promote tourism in the state, the Department of Tourism (DoT), Rajasthan has played a key role in this growth along with the DoT promoted Rajasthan Tourism Development Corporation (RTDC), which was established in November, 1978 primarily to act as catalyst by developing tourism infrastructure facilities (for domestic and foreign tourists), particularly by way of basic amenities like accommodation, catering and organised tours / sight seeing facilities.

Major Tourist Destinations in Rajasthan (Circuits and Standalone Destinations)

2.2.7 Exhibit 2.1 indicates the major tourist circuits and locations in Rajasthan.

Exhibit 2.1

Tourism Map of Rajasthan – Major Tourist Circuits



2.2.8 As seen, Tourism in Rajasthan extends almost through the entire state, though tourist activity is concentrated around six main cities, which serve as 'tourist hubs' for places of tourist attraction in and around these 'hubs'. These tourist 'hub' cities are Jaipur, Jodhpur, Jaisalmer, Bikaner, Udaipur and Mount Abu. Almost every tourist (with the possible exception of pilgrim traffic) who visits Rajasthan would visit one or more of these 'tourist hub' locations as part of his / her tourist itinerary. Each of these hubs usually form part of a Tourist Circuit as follows:

- Jaipur is a part of the popular 'Golden Triangle' circuit (Delhi-Agra-Jaipur) that is very popular with the foreign tourists
- Jodhpur, Bikaner and Jaisalmer form the popular 'Desert Circuit' of Rajasthan
- Udaipur is the entry point into south Rajasthan and forms the hub for tourist activity in the Mewar region of the state.

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

2.2.9 There are nine tourist circuits as identified by Rajasthan DoT, based on their geography, attractions and coverage by independent / group tourists. The study involves an analysis for the following circuits

- Desert Circuit: Jodhpur-Jaisalmer-Bikaner-Barmer
- Mewar Circuit: Udaipur-Rajsamand-Chittaurgarh-Bhilwara
- Vagad Circuit: Dungarpur-Banswara
- Dhundhar Circuit: Jaipur-Dausa-Tonk
- Godwar Circuit: Sirohi-Pali-Jalore
- Merwara-Marwar Circuit: Ajmer-Nagaur
- Brij-Mewat Circuit: Alwar-Bharatpur-Karauli-Dholpur-Sawai Madhopur
- Shekhawati Circuit: Sikar-Jhunjhunun-Churu
- Hadoti Circuit: Kota-Bundi-Jhalawar

2.2.10 These circuits together exhaust all the tourism attractions that Rajasthan has to offer. Of these circuits, the Jaipur (Dhundhar) Circuit, Desert Circuit and Mewar Circuit are well developed, whereas in other circuits, tourism is limited to cover of only 1-2 destinations rather than the circuit as a whole. Exhibit 2.2 provides a snapshot of the various tourism circuits.

Exhibit 2.2

Major Tourist Circuits in Rajasthan

Circuit	Season	Main Tourist Locations	Largest Tourist Location (Tourist arrivals in 2001)	Main Attractions/ Tourism Experience	Other Places of Tourist Interest
Desert Circuit	Oct-Mar	Jodhpur, Jaisalmer, Bikaner	Jodhpur (4.5 lakh)	Sand dunes and desert experience Two unique forts Palaces and carved Havelis	Osiyan (near Jodhpur) Sam and Khuri dunes, Lodurva Jain temples (near Jaisalmer) Gajner Palace and WLS, Deshnok Karni Mata temple (near Bikaner) Barmer
Mewar Circuit	Sept-Mar	Udaipur Chittaurgarh Nathdwara* Kumbhalgarh	Udaipur (7.2 lakh)	Leisure, history and pilgrim Lakes, few forts and palaces Pilgrim centres	Jaisamand Lake, Jagat and Nagda temple ruins, Rana Pratap memorials (near Udaipur) Wild life sanctuary (near Kumbhalgarh)
Vagad Circuit	Sept-Mar	Dungarpur Banswara	Banswara (1.2 lakh)	Tribal culture, fairs and festivals, forts and palaces and nature	Baneshwar, Galiyakot (near Dungarpur) Mahi Dam, Arthuna (near Banswara)
Godwar	Feb-June	Mount Abu*	Mount Abu	Leisure: Mount	Gaumukh temple,

Circuit	Season	Main Tourist Locations	Largest Tourist Location (Tourist arrivals in 2001)	Main Attractions/ Tourism Experience	Other Places of Tourist Interest
Circuit	Sept-Dec	Ranakpur	(12.9 lakh)	Abu, the only hill station in Rajasthan Pilgrim: Ranakpur, one of the five holy Jain places Delwara temples, Nakki lake	Arbuda temple (near Mount Abu)
Dhundhar Circuit	Sept-Mar	Jaipur*	Jaipur (8.3 lakh)	Forts, palaces, havelis, gardens Jantar Mantar Observatory	Samode Palace and gardens, Abhaneri step-well, Sambhar Lake, Ramgarh Lake (near Jaipur)
Brij Mewat Circuit	Oct-Feb	Bharatpur S Madhopur* Alwar Sariska*	Bharatpur (11.1 lakh)	Nature/ Wild life tourism Few forts, palaces and lakes	Siliserh Lake Palace (near Sariska and Alwar) Deeg (near Bharatpur)
Merwara-Marwar	Domestic–Throughout the year Foreign - Nov	Ajmer* Pushkar	Ajmer (13.2 lakh)	Pilgrimage (Dargah Sharif and Pushkar Lake)	Lakes (in and around Ajmer) Kishangarh (on Ajmer-Jaipur route) Roopangarh (near Kishangarh) Nagaur Fort, Merta City (Nagaur district)
Shekhawati Circuit	Sept-Mar	Sikar Jhunjhunun	Jhunjhunun (11.0 lakh)	Frescos and painted havelis	
Hadoti Circuit	Sept-Mar	Kota Bundi Jhalawar	Kota (6.4 lakh)	Natural beauty Few forts, palaces and temples	

** Also popularly covered as standalone destinations*

Desert Circuit (Jodhpur-Jaisalmer-Bikaner)

2.2.11 The Desert circuit includes the popular tourist locations of Jodhpur, Jaisalmer and Bikaner. Barmer and Nagaur are the other locations, which also increasingly form a part of the Desert circuit itinerary. The Desert circuit is popular with both foreign as well as domestic tourists. The circuit is a part of the great Indian Thar Desert and is characterised by the sand dunes spread across the region. The climate is the hot and dry for most part of the year except for a short monsoon period. Hence, tourism is seasonal with the season extending from October to March.

Mewar Circuit (Udaipur-Chittaurgarh-Nathdwara)

2.2.12 The Mewar circuit offers a combination of religion and history. Udaipur is the tourist hub of this circuit, other key tourist locations in this circuit being Chittaurgarh, Nathdwara and Kumbhalgarh. Other places of tourist interest, though less frequented are Jaisamand Lake, Jagat, Rikhabdeo, Eklingji, Haldighati, etc. Dungarpur and Banswara (often termed as the Vagad circuit) are relatively underdeveloped tourist areas adjoining the Mewar circuit. Mewar region falls in the Aravalli range that encompasses lakes, beautiful hills and deep valleys. The climate in the region is pleasant for most part of the year except the summer months from April to June. The tourist activity is high during the months of September to

March. The region being popular amongst domestic tourists, also receives tourists from the neighbouring states during vacation months in summer.

Vagad Circuit (Dungarpur-Banswara)

2.2.13 Vagad region comprises the southern tip of the Aravalli range and lies on the Rajasthan-Gujarat border. The region encompasses wild and rugged terrain in the northeast to alluvial soil in the southwest. The Vagad circuit offers a combination of tribal culture and history. Although a separate circuit by itself, Udaipur (Mewar Circuit) is most often the hub for this circuit. This circuit is relatively unexplored due to its proximity to the popularity of the adjoining the Mewar circuit. Other key tourist locations in this circuit are Baneshwar, Deo Somnath, Arthuna, Galiyakot and Mahi Dam. The climate in the region is pleasant for most part of the year except the summer months from April to June. The tourist activity is high during the months of September to March, peaking during the Baneshwar Fair in February.

Dhundhar Circuit (Jaipur-Dausa-Tonk)

2.2.14 The Dhundhar circuit is spread around Jaipur and is known for its rich blend of culture, history, architecture and religion. Besides Jaipur, it includes tourist locations such as Samode, Abhaneri, Tonk and Ramgarh. The Dhundhar circuit lies between the northern Aravalli range and close to the Sambhar Basin. The climate in the region is extremely hot during the peak summer months of April – June. As a result, the peak tourist season extends from September to March. Being the capital city and the main gateway into the state, Jaipur and the region also experiences some tourist arrivals during the vacation months.

Godwar Circuit (Mount Abu-Ranakpur)

2.2.15 The Godwar circuit has the only hill station in Rajasthan - Mount Abu. The beautiful temple town of Ranakpur is the other important attraction in the circuit. The former is very popular leisure destination with the tourist coming from Gujarat, whereas the latter is popular with both the domestic as well as foreign tourist. Although a part of the Aravalli range, Mount Abu is detached completely from it by a narrow valley and the highest point is situated at its northern end. As the only hill station in the state Mount Abu is a popular summer retreat, and the tourist season extends from February to June and in the vacation period from September to December. Located nearby are the famous Delwara Jain Temples, which are renowned all over the world for their exquisite stone carvings.

Merwara-Marwar Circuit (Ajmer-Pushkar Circuit)

2.2.16 The Merwara-Marwar Circuit is the heart of pilgrim activity in Rajasthan. Ajmer and Pushkar are the important pilgrim centres for tourists from all over India. Pushkar is internationally known for its annual camel fair held in November with a large number of foreign tourists visiting the fair every year. Other locations in the circuit, Merta and Nagaur are relatively less popular. The circuit falls in the Sambhar Plains. The tourist season is spread out evenly during the year although the tourist arrivals are very high during the annual Urs at Ajmer and the Pushkar Fair.

Brij Mewat Circuit (Alwar-Sariska-Bharatpur-Sawai Madhopur)

2.2.17 The Brij Mewat circuit is very popular with wildlife enthusiasts. The region also has a fair share of places of historic and archaeological importance. The circuit covers locations bordering Delhi, Uttar Pradesh and Madhya Pradesh and includes Alwar, Sariska, Deeg, Bharatpur, Karauli and Sawai Madhopur. Although termed as a circuit these tourist locations are covered as daily excursions from Jaipur or enroute Jaipur from either Delhi or Agra. Sawai Madhopur is also covered as a standalone circuit by the domestic to tourist.

2.2.18 The tourist arrivals at these locations are the maximum during the winter months from October to February. The main attractions in the Brij Mewat circuit are the National Parks at Sariska, Bharatpur and Ranthambhor. The circuit (especially Sariska and Bharatpur) is also popular as a weekend tourist destination for visitors coming from Delhi and the National Capital Region.

Shekhawati Circuit (Sikar-Mandawa-Jhunjhunu)

2.2.19 The Shekhawati region in Rajasthan is known for its fresco-painted havelis built by the former rich merchants of the region. The Shekhawati region is popularly called the 'open art gallery" of Rajasthan. This region includes numerous small towns like Mandawa, Nawalgarh, Sikar, Jhunjhunun, Fatehpur, Churu, Mukundgarh, Dundlod, Chirawa, etc. each having their share of such beautiful havelis. The circuit attracts primarily the foreign tourists arriving into the state. The tourist season extends from September to March.

Hadoti Circuit (Bundi-Kota-Jhalawar)

2.2.20 The Hadoti circuit is amongst the least explored regions of Rajasthan. This circuit includes the districts of Bundi, Kota and Jhalawar. Places of tourist interest in the adjoining Baran district are also covered as a part of this circuit. The tourist season in the region extends from September to March. The main attractions in the Hadoti circuit are the palaces at Kota and Bundi. The Hadoti circuit also has several places of religious interest, especially for domestic tourists arriving from Madhya Pradesh. Jhalawar is also well known for its annual fair.

2.2.21 The coverage of the above circuits by various independent tourists differs considerably. Similarly, group tourists cover these circuits in different ways. The most popular tours taken by various tourists are given in Exhibit 2.3. The nine identified circuits are covered in detail subsequently.

Exhibit 2.3

Popular Tours/ Circuits by Tourist Types

Circuit/ Destination	Popular Coverage Pattern	Popular among Tourist Category
Jaipur City	As standalone destination	Independent tourists
	As a part of the Golden Triangle	Group Tourists
	As an extension of other circuits being the state capital	Independent/ Group Tourists
Desert circuit (Jodhpur-Jaisalmer-Barmer-Bikaner)		Group Tourists (Mainly foreign)
Jodhpur –Jaisalmer: Popular leg	Also covered independently.	Group/ Independent (Foreign) Tourists
Bikaner-Barmer: Less popular	Barmer is at times not covered at all	Group Tourists
Mewar circuit (Udaipur-Chittaurgarh-Rajsamand)		Group Tourists
Udaipur City	As standalone destination	Group/ Independent (Domestic) Tourists

Circuit/ Destination	Popular Coverage Pattern	Popular among Tourist Category
Udaipur-Chittaurgarh Udaipur-Nathdwara-Rajsamand Nathdwara Udaipur-Kumbhalgarh-Ranakpur	Also done independently As a part of the PoW Day excursion from Udaipur Also covered standalone as pilgrim destination Day excursion from Udaipur	Group (Domestic)/ Independent (Domestic) Tourist Group (Foreign) Tourist Group/ Independent Domestic Tourist, particularly from Gujarat Group/ Independent Domestic Tourist
Vagad circuit (Dungarpur-Banswara) Dungarpur Banswara	 Day excursion from Udaipur / Approached from Gujarat enroute Udaipur Day excursion from Udaipur / Approached from Ratlam (Madhya Pradesh)	 Group/ Independent Domestic Tourist Group/ Independent Domestic Tourist
Godwar circuit (Mount Abu-Ranakpur)	Popularly approached from Gujarat Also approached from Udaipur	Group/ Independent Domestic Tourist Group/ Independent Domestic Tourist
Brij-Mewat circuit (Alwar-Sariska-Deeg-Bharatpur-Dholpur-Karauli-Sawai Madhopur) Keoladeo NP, Bharatpur Sariska Palace and NP Ranthambhor NP	 Covered standalone or as an extension of the Golden Triangle Covered standalone Covered standalone	Group Tourist Group/ Independent (Foreign) Tourists Group (Foreign)/ Independent (Domestic) Tourists Group (Foreign)/ Independent (Domestic) Tourists

Tourist Traffic Trends

2.2.22 Rajasthan received around 0.61 Mn of the 2.62 Mn foreign tourists who visited India in 2001. Additionally, the state also recorded over 7.75 Mn domestic tourist in the same year. The popular Golden Triangle circuit (Delhi-Agra-Jaipur) has put Jaipur on the world tourism map with the city receiving the highest number of foreign tourists visiting the state.

2.2.23 Exhibit 2.4 gives the growth trends in tourist arrivals at various locations in Rajasthan during the last five years.

Exhibit 2.4

Past Growth Trends in Tourist Arrivals

Circuit	Location	Tourists	1997	1998	1999	2000	2001
Desert Circuit	Jodhpur	Indian	427549	364870	352707	370933	383479
		Foreign	49221	49007	47807	67845	69812
		Total	476770	413877	400514	438778	453291
	Jaisalmer	Indian	69184	52889	35157	58578	103319

Circuit	Location	Tourists	1997	1998	1999	2000	2001
		Foreign	57166	52299	50283	50732	46914
		Total	126350	105188	85440	109310	150233
	Bikaner	Indian	196168	205976	225678	182477	185645
		Foreign	25479	26752	22215	28441	31441
		Total	221647	232728	247893	210918	217086
Mewar Circuit	Udaipur	Indian	638987	575088	578622	735333	662826
		Foreign	84284	78267	78708	77174	56760
		Total	723271	653355	657330	812507	719586
	Nathdwara	Indian	281161	326749	464136	462837	319159
		Foreign		37	166	300	562
		Total	281161	326786	464302	463137	319721
	Chittaurgarh	Indian	240872	327874	150108	120145	120390
		Foreign	13357	10453	5886	8164	7552
		Total	254229	338327	155994	128309	127942
	Rikhabdeo	Indian	8754	10629	16021	36893	8200
		Foreign	25	28	52	22	60
		Total	8779	10657	16073	36915	8260
Vagad Circuit	Banswara	Indian	76200	96137	111872	109053	115101
		Foreign	256	306	338	263	273
		Total	76456	96443	112210	109316	115374
Jaipur / Dhundhar Circuit	Jaipur	Indian	700358	616315	613511	745476	655715
		Foreign	184112	150971	129955	154756	172950
		Total	884470	767286	743466	900232	828665
Mount Abu - Ranakpur (Godwar Circuit)	Mount Abu	Indian	1391832	1056113	1338431	1254770	1282940
		Foreign	15818	14259	13413	14427	13752
		Total	1407650	1070372	1351844	1269197	1296692
	Ranakpur	Indian	55320	55756	55520	56949	61535
		Foreign	301	23976	21676	23816	24144
		Total	55621	79732	77196	80765	85679
Ajmer-Pushkar (Merwara-Marwar Circuit)	Ajmer	Indian	493596	783782	766497	1088000	1269309
		Foreign	60066	48808	45202	51344	54040
		Total	553662	832590	811699	1139344	1323349
	Pushkar	Indian	700515	679303	731124	951000	865000
		Foreign	50198	38150	49279	52011	46182
		Total	750713	717453	780403	1003011	911182
Brij-Mewat Circuit	Bharatpur	Indian	118310	112394	104247	118079	101181
		Foreign	16265	14638	10626	11262	9553
		Total	134575	127032	114873	129341	110734
	S. Madhopur	Indian	77238	84961	62080	89391	50598
		Foreign	4704	8602	6750	8869	10064
		Total	81942	93563	68830	98260	60662
	Alwar	Indian	50747	47360	53958	76934	100995

Circuit	Location	Tourists	1997	1998	1999	2000	2001
		Foreign	1837	12465	7934	8235	3334
		Total	52584	59825	61892	85169	104329
	Sariska	Indian	5864	10706	11949	15559	11817
		Foreign	1280	8325	9551	10854	12351
		Total	7144	19031	21500	26413	24168
	Siliserh	Indian	1780	3956	1981	2036	1843
		Foreign	394	404	254	206	120
		Total	2174	4360	2235	2242	1963
	Behror	Indian	10004	8189	6417	5754	3799
		Foreign	80	84	49	66	36
		Total	10084	8273	6466	5820	3835
Shekhawati Circuit	Jhunjunun	Indian	63085	66205	61027	68192	76446
		Foreign	26641	30233	25346	28818	33751
		Total	89726	96438	86373	97010	110197
	Sikar	Indian	14912	7952	5952	8136	6382
		Foreign	803	574	337	527	295
		Total	15715	8526	6289	8663	6677
Hadoti Circuit	Kota	Indian	102162	83212	53017	53874	62438
		Foreign	2156	1834	1523	1775	1991
		Total	104318	85046	54540	55649	64429
	Bundi	Indian	2661	11333	29293	30433	20911
		Foreign	1431	3818	10342	10568	4334
		Total	4092	15151	39635	41001	25245
	Jhalawar	Indian	183812	124615	128703	189694	174262
		Foreign	95	47	41	82	72
		Total	183907	124662	128744	189776	174334
Others		Indian	379044	690946	717520	543865	1113927
		Foreign	9091	17032	24952	12543	7940
		Total	388135	707978	742472	556408	1121867
Grand Total		Indian	6290115	6403310	6675528	7374391	7757217
		Foreign	605060	591369	562685	623100	608283
		Total	6895175	6994679	7238213	7997491	8365500

Source: DoT Statistics, Government of Rajasthan

2.2.24 The main tourist traffic trends in Rajasthan over the past 5 years are as follows:

- **Slow Growth in tourism in the main tourist locations**: The main tourist cities of Rajasthan namely, Jaipur, Udaipur, Jodhpur, Jaisalmer, Bikaner and Mount Abu have seen marginal growth (and occasionally a marginal decline) in total tourist traffic and all these locations (barring a few exceptions) have seen tourist traffic levels in 2001 largely unchanged from 5 years ago (1997)
- **Select Tourist locations are experiencing high growth**: In particular, the Ajmer-Pushkar circuit is experiencing high growth in domestic tourists – whilst foreign tourist traffic at these locations is more or less static, domestic tourist traffic has increased significantly particularly at Ajmer

Also, the Alwar-Sariska belt is experiencing strong growth. Growth in domestic tourism is largely due to its increasing popularity as a weekend gateway from Delhi (as well as a ‘conference tourism’ venue) while growth in foreign tourist traffic is led by the growing popularity of the Sariska WLS amongst foreigners who visits Jaipur and / or cover the Golden Triangle circuit

Amongst the smaller tourist destinations, Bundi is particularly (part of the Hadoti circuit) has seen a multi-fold increase in both domestic and foreign traffic

Banswara (also Dungarpur) is slowly emerging on the tourist map though it should be noted that taking Banswara as an example traffic is led by the annual religious festivals / fairs

- **The tourism experience sought from Rajasthan is changing**: Traditionally the Rajasthan tourism experience offered palaces, forts, lakes and the desert. However, based on the 5-year trend in tourist traffic, the experience sought from Rajasthan is changing. The traditional tourism experience is no doubt desired but the focus is gradually shifting to more varied tourism products particularly:
  - Eco-tourism / wild life tourism (particularly the Sanctuaries)
  - Weekend tourism / conference tourism (particularly in Northern Rajasthan given its proximity to Delhi and NCR)
  - Value-added desert tourism (including adventure tourism, desert safaris, desert sports, etc.)
  - Newer (less ‘touristry’) destinations offering the same traditional experience (e.g. Bundi, distant heritage hotels, etc.)
- **Domestic tourists are gradually becoming more important than foreign tourists**: More so since in the last few years (and particularly in 2001) foreign tourists have been static while domestic tourists have grown.

2.2.25 Tourism activity in Rajasthan has shown a direct correlation with the socio-political stability in the country and the state. Political uncertainty, social unrest and such events have affected the tourist activity adversely in the past. Although, the foreign tourist numbers have remained stable over the years, they have failed to achieve their growth potential.

<u>Existing Direct Tourism Infrastructure</u>

2.2.26 Success of tourism in Rajasthan hinges critically upon the adequacy and quality of tourism related infrastructure (and the tourist facilities and services) that are available to the tourist. Tourism relevant infrastructure specifically includes the following:

- Transport and Connectivity Infrastructure (by Air/ Rail/ Road both in terms of transport terminals, connectivity and transport services)
- Direct Tourism Infrastructure in terms of :

  a) Accommodation (Private/ Government)

  b) Tourist Offices and Information Centres

  c) Midway and Wayside Facilities

  d) Others (Shopping facilities, Restaurants, etc.)
- Sanctuaries and Monuments

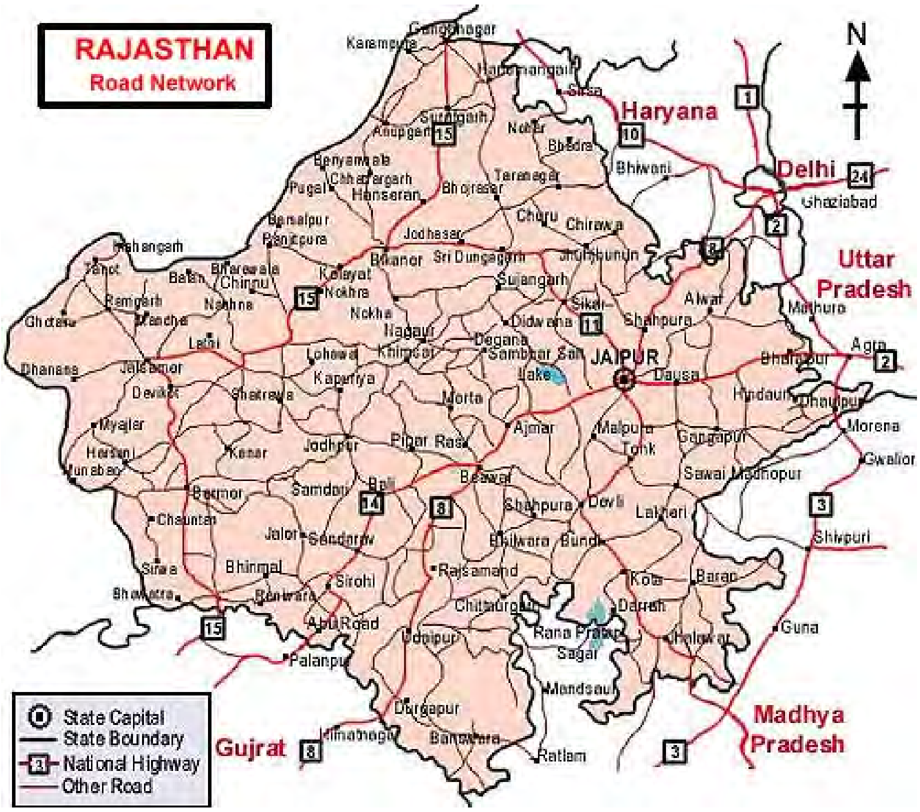
Transport Infrastructure in Rajasthan

<u>Road network</u>

2.2.27 The state has a well-developed network of roads that facilitate access to the main tourist hubs from within and outside the state and ease movement within the circuits. Hubs such as Jaipur, Jodhpur and Udaipur are connected to other tourist places in the state through a well-developed network of roads. The road connectivity in the state is depicted in the Exhibit 2.5.

<u>Exhibit 2.5</u>

<u>Road Connectivity in Rajasthan</u>



2.2.28 There are regular RSRTC services connecting various locations in the state with each other. Besides these, there are many private services connecting major tourist cities and attractions within.

<u>Railways</u>

2.2.29 The rail network in Rajasthan mainly falls under the Western and Northern Railway zones. A small section of track also falls under the Central Railway zone. The total length of railway routes in the state is around 5,920 Kms. Out of the total length, 3,028 Kms is covered under broad gauge, 2,803 Kms under meter gauge and 89 Kms under narrow gauge and a small stretch of 491 Kms on the Western Railway (between Gangdhar and Bharatpur) is electrified.

2.2.30 Jodhpur, Jaipur, Ajmer, Bikaner, Kota, Sawai Madhopur, Chittaurgarh, Merta Road and Bharatpur are the major rail junctions in Rajasthan with broad gauge connectivity with the rest of the country. Udaipur is also an important railway terminal though at present it is on the metre gauge network.

2.2.31 The rail connectivity map of Rajasthan is provided in Exhibit 2.6.

Exhibit 2.6

Railway Connectivity Map of Rajasthan

2.2.32 There are regular train services between major tourist cities within the state as well as with important cities in the country.

<u>Air Links</u>

2.2.33 Although Rajasthan has 19 airstrips and 128 helipads, regular commercial air services are operational only at Jaipur, Jodhpur and Udaipur. Kota and Jaisalmer do not have regular commercial flight services inspite of having adequate landing and take off facilities. Flights to Jaisalmer have been discontinued recently given its sensitive location bordering Pakistan.

2.2.34 Airports at Jaipur and Udaipur are managed by the Airports Authority of India (AAI) whereas the airstrips at Jodhpur and Jaisalmer are under the control of Indian Air Force (IAF).

2.2.35 Air services connect the state only to Mumbai and Delhi. Indian Airlines, Jet Airways and Alliance Air operate regular flights to Udaipur, Jodhpur and Jaipur, ex-Mumbai/Delhi.

Accommodation

Hotels (including Heritage Hotels)

2.2.36 Rajasthan offers the tourist a vast range of accommodation options to suit his budget as well as his preferences. It is estimated that the total number of hotels in the State is around 1,450 with a bed capacity of approx. 55,000-60,000. More than 75% of these hotels are located in the major tourist hubs such as Jaipur (~300 hotels), Udaipur (~130 hotels), Mount Abu (~130 hotels), Jodhpur (~90 hotels), Ajmer (~70 hotels), Jaisalmer (~50 hotels), etc.

2.2.37 The hotels in Rajasthan are largely managed by the private sector primarily by local entrepreneurs or local/ regional hotels/ groups. Domestic and international hotel chains are also present in the state and offer accommodation primarily in the luxury category. Domestic hotel chains like The Taj Group (Indian Hotels Co. Ltd.), The Oberoi Group (East India Hotels Ltd.), WelcomHeritage Hotels (ITC Hotels), HRH Group who own/ manage several star hotels in the state. Similarly, international chains like Holiday Inn, Accor, Radisson, Quality Inn also have a presence in the state through franchisee arrangements.

2.2.38 Rajasthan has been a pioneer state in launching heritage hotels in the country by converting old palaces and havelis of erstwhile rulers into tourist accommodations. These heritage hotels have become extremely popular with tourists, especially the foreign tourists. At present there are 43 DoT recognised heritage hotels in Rajasthan with a room capacity of 2330 rooms. Apart from these, there are 53 other heritage hotels (with an approx. capacity of 1800 rooms) that are not recognised by the DoT.

RTDC Hotel Accommodation

2.2.39 RTDC today owns/ manages 61 properties consisting of 36 hotels and 15 motels. In its initiative to privatise its assets, RTDC has leased out some of its properties to private houses. A total of 2102 bed capacity is available with RTDC across its four categories of hotels, namely, Elite, Classic, Standard and Economy. Within these, RTDC offers suites, AC rooms, cool rooms, huts, ordinary rooms and dormitories to the tourists. Accommodation at RTDC hotels is available at reasonable tariffs (ranging from Rs. 50 for dormitories at Economy hotels to Rs. 1900 for suites at Elite Hotels). The main/flagship RTDC properties in the state are Hotel Gangaur (126 beds), Hotel Swagatam (100 beds) and Hotel Teej (109 beds) in Jaipur, Hotel Moomal (130 beds) in Jaisalmer, Hotel Ghoomar (156 beds) in Jodhpur, Hotel Shikhar (164 beds) in Mt. Abu, Hotel Kajri (141 beds) in Udaipur

Paying Guest Accommodation

2.2.40 A major part of the tourism experience for a tourist is experiencing local life at a particular place. Recognising this, the Rajasthan Government, as part of its tourism activities, has pioneered a Paying Guest Scheme, wherein the tourists can stay as paying guests in a family atmosphere. This scheme is presently in operation in 12 cities in Rajasthan (Ajmer, Alwar, Bharatpur, Bikaner, Bundi, Chittaurgarh, Jaipur, Jaisalmer, Jodhpur, Kota, Mount Abu and Udaipur) and the estimated number facilities across the state is approx. 450 units with a total capacity of approx. 2700 beds.

Tents

2.2.41 Temporary tented accommodations are also available particularly during specific events such as fairs and festivals, when there is a large influx of tourists. Presently such tented accommodation is available in Pushkar, Jaisalmer and Nagaur during their fairs and festivals and is very popular with all the tourists.

2.2.42 Tents are provided by RTDC as well as other hotel chains like the Taj, Oberoi and WelcomHeritage. For example, during the annual Pushkar Festival, RTDC sets up a temporary tourist village consisting of huts (32), Swiss tents (150), standard tents (50) and dormitories (25). The village also has a coffee shop and a dining hall, which can cater to 1500 guests at a time. In addition to this, private hotels also put up over 500 tents during the same period.

Dharamshalas/ Dormitories

2.2.43 Several religious trusts across the state run dharamshalas/ dormitories that provide basic accommodation largely to the pilgrim tourists. Such accommodations supplement regular accommodation at pilgrim places like Ranakpur, Nathdwara, Ajmer, Pushkar, etc. and also at other cities such as Jaipur, Udaipur, Jodhpur, etc.

2.2.44 The estimated bed capacity of these dharamshalas would be close to 8,000 by and large in dormitory style accommodation This capacity is however flexible and can be stretched to accommodate a large mass of pilgrims arriving during various fairs and festivals.

Tourist Offices and Information Centres

2.2.45 Another critical tourist infrastructure is tourist information centres in a place. These centres are designed to help the tourist get the best tourism experience in any location.

2.2.46 DoT, Rajasthan operates Tourist Reception Centres (TRCs) and Tourist Information Bureaus (TIBs) at various places across the state. The primary aim of these offices is to provide the arriving tourist with essential information related to accommodation, travel and sight seeing, shopping and events. Presently, there are 11 TRCs and 29 TIBs at different tourist locations in the state. Also, there are two regional tourist offices in Jodhpur and Udaipur and smaller TRCs in Delhi, Kolkata, Mumbai, Ahmedabad and Chennai. Apart from offering tourist information, the TRCs also provide services such as arranging for bookings at RTDC and other private hotels in Rajasthan, information on other details like package tours, fairs and festivals, paying guest accommodation, etc.

Midways and Wayside facilities

2.2.47 Rajasthan has a huge geographical area spanning more than 800 Kms from East to West and North to South. Since the air network and rail connectivity is limited in terms of its reach to smaller locations, there is a greater use of road for intercity travel as well as day-trips/ excursions from the major tourist destinations. This necessitates creation of suitable midway/ wayside infrastructure to provide enroute/ wayside amenities at appropriate places so that traveling tourists can relax and refresh.

2.2.48 To overcome these deficiencies, RTDC has provided mid-ways at various places on the popular tourist routes. Presently, there are 21 such RTDC midways/ wayside facilities. Besides these, there are also private midway facilities offered on most busy tourist routes.

Sanctuaries/ Parks

2.2.49 The forests of Rajasthan cover an approx. 9.3% of the total geographical area of the state. These forests are spread unequally in northern, southern, eastern and southeastern parts of the state. Rajasthan has 4 National Parks and 25 Wildlife Sanctuaries identified by the State Forest Department. The total area of National parks / Sanctuaries is 9,161.21 sq. km., which is roughly 2.8% of the geographic area of the state or 30.2% of the forest areas in the state.

2.2.50 Although the state has over 25 sanctuaries/ parks, only the National Parks at Bharatpur, Ranthambhor and Sariska are amongst the popular tourist attractions in the state. The total tourist arrival at these places in 1999 was close to 2.2 lakh tourists, which includes a large number of foreign tourists. Other protected areas in the state are relatively less popular with only around 32,000 tourist arrivals cumulatively. Development and promotion of these sanctuaries on a selective basis thus offers Rajasthan the opportunity to enhance the its tourism experience in the state.

Monuments

2.2.51 Rajasthan is richly endowed with historical, religious, cultural and nature sites. It houses old monuments such as forts, palaces, havelis, memorials, cenotaphs, towers, statues, etc. of various centuries. These historical monuments are currently under various agencies such as the State Government, Archaeological Survey of India and Archaeology and Museums Department. A large number of monuments such as palaces, havelis and others are still owned by the erstwhile rulers and the private trusts set-up by them.

Recreational Facilities

2.2.52 Recreational facilities include resorts, amusement parks, boating facilities, camping facilities, health rejuvenation, etc. Although Rajasthan has a vast inventory of natural and cultural attractions, it traditionally had relatively few recreational facilities to offer to the tourist. However, this is changing and a beginning has already been made with recreational facilities and products such as boating, camping, hiking, horse safaris, etc., being started by private entrepreneurs at various tourist places.

Cultural Complexes

2.2.53 Rajasthan is rich in its cultural diversity with each region in the state having its own identity in terms of traditions and customs, lifestyle, art, music and dances, attire and cuisine. The visiting tourist can experience this diversity while traveling in the state and also through various museums and fairs and festivals. However, there is a need to make this diversity reach the tourist 'at one place' whereby he can understand, appreciate and have a participative cultural experience.

2.2.54 Presently, this integrated promotion of the cultural diversity to the tourist is done through initiatives such as Shilpgram (Udaipur) run by Western Zone Cultural Complex and Bhartiya Lok Kala Museum (Udaipur). Choki Dhani (Jaipur), started by a private entrepreneur is also an example of a cultural complex operating on a commercial format.

Shopping Facilities

2.2.55 Shopping is another complementary activity that contributes to the overall attractiveness of a tourism destination. Rajasthan's cultural heritage translates itself into various art-form expressed through textiles, wood-carvings, paintings, stone-carvings, gemstones and jewelry, leather products, etc. As such, Rajasthan has a lot to offer to the tourist in terms of range of goods available. However, the local industries are scattered across the state and have a very fragmented and small scale dominated retail base.

2.2.56 There are exceptions, however, in the form of a few organised setups like Rajasthali (Government of Rajasthan undertaking), Cottage Industries Emporium (Private), Central Cottage Industries Emporium (Private) who have a network of retail outlets in major tourist cities in the state. Besides these there are Government approved souvenir shops in all major tourist cities and towns though they are out-numbered by small, unorganised set-ups.

2.3 TOURIST FORECAST FOR RAJASTHAN

2.3.1 Based on the locationwise/ circuitwise evaluation and assessment of potential for future tourism growth, the forecast for tourist arrivals in the state over the perspective plan period is as follows:

Exhibit 2.7

Forecast of Tourist Arrivals at the Important Locations in Rajasthan

Circuit	Location	Tourist Category	Actual 2001	Forecast of Tourist Arrivals (Nos.)		
				2006	2011	2021
Desert	Jodhpur	Domestic	383479	393536	434495	583925
		Foreign	69812	89247	113904	145789
		Total	453291	482782	548399	729714
	Jaisalmer	Domestic	103319	87752	106764	136650
		Foreign	46914	73477	107962	159737
		Total	150233	161229	214726	296387
	Bikaner	Domestic	185645	216642	239190	264215
		Foreign	31441	44729	62735	92820
		Total	217086	261371	301925	357034
Mewar	Udaipur	Domestic	662826	685293	720250	795604
		Foreign	56760	90994	110708	148712
		Total	719586	776287	830957	944316
	Nathdwara	Domestic	319159	491301	597743	693621
		Foreign	562	390	474	637
		Total	319721	491691	598217	694258
	Chittaurgarh	Domestic	120390	170227	178910	197628
		Foreign	7552	10409	12664	17012
		Total	127942	180636	191574	214640
	Rishabdeo	Domestic	8200	22688	27603	32031
		Foreign	60	48	53	65
		Total	8260	22736	27656	32096

Circuit	Location	Tourist Category	Actual 2001	Forecast of Tourist Arrivals (Nos.)		
				2006	2011	2021
Vagad	Banswara	Domestic	115101	144154	192911	285423
		Foreign	273	332	367	447
		Total	115374	144487	193278	285871
Dhundhar	Jaipur	Domestic	655715	775477	856189	945766
		Foreign	172950	200776	232754	297909
		Total	828665	976253	1088943	1243675
Godwar	Mount Abu	Domestic	1282940	1395053	1540251	1701395
		Foreign	13752	19733	24009	30729
		Total	1296692	1414786	1564259	1732124
	Ranakpur	Domestic	61535	63953	70609	77997
		Foreign	24144	30787	37458	47943
		Total	85679	94740	108067	125940
Merwara - Marwar	Ajmer	Domestic	1269309	1343507	1714693	2303318
		Foreign	54040	68594	87546	117598
		Total	1323349	1412101	1802238	2420916
	Pushkar	Domestic	865000	1157712	1477567	1891185
		Foreign	46182	63636	81218	109098
		Total	911182	1221348	1558784	2000284
Brij – Mewat	Bharatpur	Domestic	101181	120276	146334	216610
		Foreign	9553	13808	19366	31531
		Total	110734	134083	165699	248140
	S. Madhopur	Domestic	50598	80682	98162	125641
		Foreign	10064	15033	22089	32682
		Total	60662	95715	120251	158322
	Alwar	Domestic	100995	109715	140027	207274
		Foreign	3334	8524	10879	17720
		Total	104329	118239	150906	224995
	Sariska	Domestic	11817	24732	39831	64881
		Foreign	12351	30874	62100	111013
		Total	24168	55607	101931	175894
	Siliserh	Domestic	1843	2429	3099	4165
		Foreign	120	237	262	319
		Total	1963	2666	3362	4485
	Behror	Domestic	3799	8585	10957	14024
		Foreign	36	171	275	469
		Total	3835	8756	11232	14493

Circuit	Location	Tourist Category	Actual 2001	Forecast of Tourist Arrivals (Nos.)		
				2006	2011	2021
Shekhawati	Jhunjunun	Domestic	76446	101244	129216	165387
		Foreign	33751	90977	146520	250024
		Total	110197	192221	275736	415412
	Sikar	Domestic	6382	11081	14143	18102
		Foreign	295	1332	2145	3659
		Total	6677	12413	16287	21761
Hadoti	Kota	Domestic	62438	128100	206306	305242
		Foreign	1991	4553	8024	15048
		Total	64429	132653	214330	320290
	Bundi	Domestic	20911	56318	113275	232833
		Foreign	4334	17258	30415	57036
		Total	25245	73576	143690	289869
	Jhalawar	Domestic	174262	262968	386386	571682
		Foreign	72	166	292	548
		Total	174334	263134	386679	572230
Others	Others	Domestic	1113927	1040122	1528280	4337669
		Foreign	7940	18546	27251	96595
		Total	1121867	1058668	1555531	4434265
Total	**Total**	**Domestic**	**7757217**	**8893545**	**10973192**	**16172269**
		Foreign	**608283**	**894632**	**1201467**	**1785142**
		Total	**8365500**	**9788177**	**12174658**	**17957411**

2.3.2 The tourist arrivals at each of the eight regions studied is expected to grow at a higher rate in the first and second phase (2002-2006) and plateau out in the latter years. These growth rates are based on various factors such as basic tourism potential of a region, current and required infrastructure levels and scope for development of new products in the future. The tourism infrastructure required to tap the full tourism potential of a place in terms of existing attractions and new tourism products is identified and the growth rates are based on provision of this infrastructure as per the phasing given.

2.3.3 It is expected that Ajmer, Pushkar, Mount Abu, Udaipur and Jaipur would continue to be the important locations for tourism in Rajasthan inspite of constraints on their carrying capacity. In the later part of the forecast period (in the long term), other relatively unexplored locations are expected to gain importance and grow sharply.

2.3.4 The prime focus therefore should be on augmenting the tourism infrastructure at the presently popular destinations to meet the short and medium term growth. At the same time, new tourism products and infrastructure should be created at the lesser-known destinations so that they attract some share of tourists from the already saturated places.

2.4 SUMMARY OF ONGOING PROJECTS

2.4.1 There are a number of ongoing/ proposed direct tourism infrastructure projects in Rajasthan planned by the State Government to be implemented over the next five years as summarised below:

Exhibit 2.8

Rajasthan State Plan and CSS Tourism Projects (Ongoing/ Proposed)

Sr. No	Category	Total Investment (Rs. Lakhs)	Executing Agency
1	Site Enhancement (Major Projects above Rs. 50 Lakhs each)	2048.0	Various
2	Midways, Tourist Offices, Website Upgradation	247.5	RTDC
3	Shilpgram	86.0	RTDC, Collector
4	Food Craft Institute	265.5	RSBCC
5	Others	1104.0	Various
	Total	*3751.0*	
6	Roads*	5382.0	PWD
	Total	**9133.0**	

Note: As regards road projects, Rajasthan is somewhat unique in the sense that most of the major tourist destinations are on major National Highways like NH8, NH11, NH15, NH14, NH12, which are already well-developed or on major State Highways. Consequently, road infrastructure upgradation relevant to tourism is for the connecting/ 'last mile' connectivity to tourist sites, which are assumed to be developed in the short term

2.4.2 Most of these projects relate to bridging the existing 'gaps' at various tourist locations and also aimed at tourist site enhancement. In addition to above there are also a few large tourism related projects as indicated below:

- **Jaipur International Airport Project**: The Jaipur airport is being upgraded to an International airport. It has been proposed to take up the extension of runway from 7500 ft. to 9000 ft. and construction of new control tower and parking bays. The airport upgradation project is being implemented through the efforts of RTDC supported by AAI. The project is estimated to cost approx. Rs. 77 Cr.
- **Jal Mahal Tourism Infrastructure Project (JTIP)**: The JTIP proposes to refurbish the Jal Mahal Palace and develop infrastructure in the near vicinity. This includes refurbishing Jal Mahal, developing boating, building tourist cottages and clubs, developing heritage village and crafts market, etc. It is estimated to cost approx. Rs.70 Cr. and is being developed with active participation from the private sector.
- **Mewar Complex Project**: Places connected with the life of Maharana Pratap are being developed as tourist locations under the Mewar Complex project. These places include Kumbhalgarh, Chittaurgarh, Haldighati, Gogunda and Chawand. The project envisages creation of basic tourism infrastructure, beautification and creation of interpretation facilities at these places.
- **Jaipur Film City Project**: The state government is planning to develop a film city near Jaipur at Jamdoli for which it has acquired 1,000 acres of land. The government has chalked out incentives to attract Mumbai film industry producers and investors to set up studios and multiplex cinema theatres. This initiative is expected to attract more domestic tourists to the city.

- **Various Hotel Projects across the State**: The private sector on its part is instrumental in creating infrastructure like hotels and resorts in the state. Some of the large hotel projects proposed in the state are Vision Hotels and Resorts (Leela Group), Marwar Hotels (Accor Group), EIH Ltd. (Oberoi Group), Royale Manor Hotels and Industries Ltd., in Udaipur, Suman Motels, Bharat Hotels and Jaypee Hotels (Jaiprakash Group) in Jaipur, Suman Motels, Marwar Hotels (Accor Group) in Jaisalmer and Royale Manor Hotels and Industries Ltd. in Jodhpur

New Projects: Investment and Phasing

2.4.3 Based on the above analysis, the key project areas, total investment required in these and their phasing is summarised in Exhibit 2.9. For the purpose of phasing of the projects, three time periods have been considered as follows:

- Short term (2002-06), i.e. 5 years
- Medium term (2006-11), i.e. next 5-10 years
- Long term (2011-21), i.e. beyond 10 years

2.4.4 While providing the overall cost estimates and phasing of investment for the proposed projects, the likely parties responsible for funding and implementation of the projects have also been identified.

Exhibit 2.9

Summary of Investment and Phasing of Tourism Projects

Sr. No	Category	Total Investment (Rs. Lakhs)	Phasing		
			Short term	Medium Term	Long Term
1	**Connectivity Infrastructure**	**17732**	**7882**	**3750**	**6100**
	• Airports/ helipads	12350	2500	3750	6100
	• Link Roads/ Approach roads	5382	5382	0	0
2	**Tourism Related Infrastructure**	**142008**	**59489**	**37619**	**44900**
	• Hotels	125110	51760	31090	42260
	• Resorts/ Camping Sites	7772	2235	3572	1965
	Sub-total	*132882*	*53995*	*34662*	*44225*
	• Wayside Facilities	700	700	0	0
	• Tourist Offices	70	50	15	5
	• Tourist site enhancement	1792	690	732	370
	• Sanctuaries/ Eco-tourism	574	574	0	0
	• Tourism Products	5990	3480	2210	300
	Total	**159740**	**67371**	**41369**	**51000**

Note: The circuit-wise, location-wise details of individual projects are provided in the main report. Only a summary of the same is provided in this Executive Summary. It should be noted that these are new projects that have been identified and are in addition to the on-going projects (except for roads) summarised earlier.

2.4.5 As seen in the Exhibit, a total of around Rs. 1520 Cr. of investment is estimated to be required for these **new/ additional projects** over the next twenty years to develop direct tourism infrastructure in the state. A large part of this investment is expected to be in accommodation facilities followed by connectivity infrastructure and is detailed below.

Accommodation

2.4.6 Accommodation facilities need to be added in line with the traffic growth in the state and at particular destinations. Presently there is an aggregate overcapacity in accommodation availability in the state. Current occupancy levels at most tourist locations in the state are in the range of 80-85%. However, at a micro level, there is a shortfall in specific categories of hotels at certain locations based on peaktime tourist arrivals. Based on the future trends in tourist arrivals and their stay patterns, it is estimated that there would be a shortfall of about 36,000 rooms in Rajasthan by 2021.

Exhibit 2.10

Hotel Projects: Investment and Phasing

Category	By 2006 (Short term)			2007-2011 (Medium term)			2012-2021 (Long term)			Total		
	No. of Hotels	No of Rooms	Invst. (Rs. Lakhs)	No. of Hotels	No of Rooms	Invst. (Rs. Lakhs)	No. of Hotels	No of Rooms	Invst. (Rs. Lakhs)	No. of hotels	No of Rooms	Invst. (Rs. Lakhs)
Luxury	8	800	17600	8	800	17600	11	1100	24200	27	2700	59400
Mid-priced	63	3150	25200	21	1050	8400	27	1350	10800	111	5550	44400
Economy	68	2040	6120	45	1350	4050	63	1890	5670	176	5280	15840
Others	284	2840	2840	104	1040	1040	159	1590	1590	547	5470	5470
Total	**423**	**8830**	**51760**	**178**	**4240**	**31090**	**260**	**5930**	**42260**	**861**	**19000**	**125110**

Note: (1) Refer Appendix 8B for the detailed calculations and assumptions
(2) Investment requirement is based on the following assumptions
Luxury : 100 rooms @ Rs. 22 Lakh/ Room
Mid-priced : 50 rooms @Rs. 8 Lakhs/ Room
Economy : 30 rooms @ Rs. 3 Lakhs/ Room

2.4.7 In addition to the standard forms of accommodation facilities (hotels and paying guest), accommodation in form of resorts and camping sites have also been proposed in the perspective plan.

2.4.8 In case of connectivity infrastructure, construction and repairs of link and approach roads already identified by the DoT would be needed to be taken on priority.

Air

2.4.9 At present Jodhpur, Jaisalmer and Bikaner have airstrips under the control of the Indian Air Force (IAF) with the runway shared by the civilian aircrafts and IAF. Presently, regular flights are operational from Jodhpur only.

- **Jodhpur**: The current runway can only handle smaller aircraft- AT7 (62 seater) operated by Jet Airways and 737-100/200 (~110 seater) operated by Alliance Air. However, with only 6 flights per day the airport capacity is sufficient to meet short / medium term needs. In long term, there is a need to upgrade the airport at Jodhpur to handle bigger aircraft (Boeing 737) with a scope for future expansion to Airbus A320, which can facilitate direct flight services to Jodhpur.
- Also, based on the future arrival forecast at the Jodhpur airport, a separate airport terminal is required in Jodhpur in the longer term.
- **Bikaner**: A separate airstrip is recommended at Bikaner. There is an unused airstrip in Bikaner under the control of the state government. This could be upgraded to facilitate small and medium capacity aircrafts. At the same time,

domestic carriers should be asked to start flight services to Bikaner. This project could be undertaken over a long term.

- **Udaipur**: The current runaway at Maharana Pratap Airport, Dabok can only handle smaller aircraft (737-200 and A37 type aircraft). There is a need to extend the runaway to handle bigger aircraft over the medium/ long term.
- **Ajmer/ Pushkar**: An airstrip, which would handle small and medium capacity aircrafts, is recommended near Ajmer. A small terminal to handle tourist traffic is also proposed to be constructed. Domestic air taxi operators should be invited to start flight services to Ajmer from Delhi and Mumbai. On this front, AAI has recently commissioned a feasibility study for construction of a domestic airport at Ajmer. This project is expected to cost Rs. 2500 Lakhs and would be undertaken over the next 5 years.
- **Jaipur**: Jaipur Airport is being developed as an International Airport, by extending the runway from 7500 feet to 12000 feet (including building of culverts). Phase I envisages construction of RCC culverts and extension of runway from 7500 feet to 9000 ft while Phase II encompasses extension from 9000 feet to 12000 feet. Other works such as parking aprons, taxi track and international terminal building is also proposed to be carried out. The total cost of the proposed work is estimated to be Rs. 7700 Lakhs. Since the funds for the project have already been allocated and the project implementation work is already underway, it has not been excluded from this list.
- **Others**: Helipads to cater to tourist arrivals in Dungarpur, Kota and Mount Abu is proposed to be constructed in the medium term. The estimated cost of the three helipads with the associated passenger's terminals would be around Rs. 750 Lakhs.

2.4.10 A total of approx. Rs. 124 Cr. would be needed on additional infrastructure for air connectivity. Exhibit 2.11 provides the details of investment requirement and phasing for air connectivity projects in Rajasthan.

Exhibit 2.11

Air Connectivity Projects: Investment and Phasing

	By 2006 (Short term)		**2011 (Medium term)**		**2021 (Long term)**		**Total**	
	No. of projects	Invst (Rs. Lakhs)	No. projects	Invst (Rs. Lakhs)	No. of projects	Invst (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)
Airports / Airstrips /	1	2500.00	2	3000.00	2	6100.00	5	11600.00
Helipads	--	--	3	750.00	--	--	3	750.00
Total	**1**	**2500.00**	**5**	**3750.00**	**2**	**6100.00**	**8**	**12350.00**

Roads

2.4.11 The DoT has proposed works amounting to Rs. 5382.07 Lakhs for road development and repairs for tourist locations in the state. (This has been discussed earlier in Chapter 6 on a circuit-wise basis). Some of these projects are already underway. To ensure smooth flow of tourists and accessibility of the tourist attractions, it is recommended that the remaining works be carried out in the short term (within the next 5 years).

2.4.12 Similarly, other tourism infrastructure such as wayside facilities and tourist offices need to be provided on a priority basis at various locations. Tourist site enhancement and new tourism products should be phased out so as to optimise the destination life cycle.

2.5 ROLE OF PRIVATE SECTOR AND PRIVATISATION

2.5.1 The development of tourism in Rajasthan in the future would be largely dependent upon partnership of government agencies (in core infrastructure) and private sector (in tourism assets and projects).

2.5.2 There is a need for the private sector to play a more contributory role in tourism development in the state. From owning and managing tourism-related direct infrastructure in the state, the private sector would now have to play active role in defining the overall direction of tourism in the state by:

i) Ownership of tourist attractions and creation of tourism products

ii) Promoting ‘Brand Rajasthan’

iii) Consultative and participatory role in Policy making

iv) Seeking community support for tourism

State Government Initiatives for Development of Tourism Industry

2.5.3 Recognising the role of the private sector in the development of the tourism industry, the State Government has announced several initiatives and incentives to encourage and facilitate private sector participation. Some of these are outlined below:

- **Acquisition of land for tourism development**: A Land Bank has been set up by DoT through its nodal agency, RTDC, to make available land belonging to various government departments (PWD, Forest and Revenue), local municipalities, corporations, UITs to the private investor for setting up tourism units.
- **Identification of Nazool Properties for establishment of tourism units**: These are properties which are not protected by State Department of Archaeology and Museums (A&M) or Archaeological Survey of India (ASI) and which are owned by the State Government. Such properties would be transferred to DoT for developing into heritage hotels / museums / tourist complexes / tourist resorts in collaboration with private entrepreneurs under Disposal of Land and Properties by DoT/RTDC Rules, 1997.
- **Simplification of rules and regulations for allotment and conversion of land for tourism infrastructure**: DoT, in consultation with the revenue and local self government departments is in the process of amending the relevant rules for conversion and allotment of land for setting up of tourism units in rural and urban areas.
- **Identification of Special tourist areas for preservation of special characters of these areas**: DoT is initiating special efforts to preserve the unique identity of tourist destinations that have assumed heritage importance like Jaisalmer, Pushkar, Nathdwara, Mount Abu, etc. Accordingly, local authorities have been asked to pass special laws to ensure preservation of special character of these tourist towns.
- **Preservation of historical and cultural heritage**: DoT is encouraging private initiative in preservation or monuments (forts, palaces, etc.) by offering these monuments for adoption. Efforts are being made to co-ordinate preservation, conservation and upkeep of the old buildings with all departments including ASI, A & M, Devasthan, Waqf Board, UIT’s, municipalities, corporations, etc.

State Government Incentives to Tourism Units

2.5.4 To supplement its initiatives, the State Government has also extended various incentives for tourism industry in Rajasthan. Some of the important ones are mentioned below:

- Remission in stamp duty to the extent of 50% on transfer of deeds relating to land purchased in Municipal areas and to the extent of 100% relating to land purchased in Panchayat area
- Remission in Land and Building tax to the extent of 100% for hotels for the first five years if the hotel falls in a Municipal area
- Remission in Luxury tax to the extent of 50% for five years in Municipal areas and to the extent of 100% for five years in Panchayat areas
- Concession in Bar License fees for heritage hotels
- Increase in Luxury Tax slabs from Rs. 750 to Rs. 1000 and 50% rebate in Luxury Tax during off-season (April- July)
- Interest subsidy of 2% for tourism units on capital investment of Rs. 60 Lakhs and above with a condition that at least 50% of the unskilled workforce will be employed from local people
- DG sets subsidy at 25% of purchased value subject to maximum of Rs. 2.5 Lakhs for tourism units established in rural areas
- Entertainment tax exemption for films to the extent of 100% for a period of one year from the date of release if 75% of the film is picturised in Rajasthan
- Entertainment tax exemption to the extent 75% in first year, 50% in second year and 25% in third year for new Multiplexes and Drive-in Cinemas
- Allotment of Government land upto four bigas in rural areas at 25% of the reserved price of agricultural land subject to the condition that 100% unskilled workforce is employed from the local area

2.5.5 Apart from the above state incentives, tourism units in the state can also avail of various incentives and concessions offered by the Central Government from time to time.

Recent Efforts at Privatisation of RTDC Properties and Learnings

2.5.6 After tourism was accorded an industry status by the Government of Rajasthan in 1989, a private sector led tourism development was envisaged. Inline with this vision, the State Government has embarked on the path of privatisation of its current tourism assets. The main area in which privatisation has been successful is in accommodation, wherein the Department of Tourism has leased out 17 RTDC units (Hotels and Midways) to private parties on a short term two-year lease. Similarly, 21 more units are proposed to be leased out in the near future. Depending on the willingness of the private initiative to take up these properties and develop them further, the other properties will be similarly leased out.

2.5.7 Discussions with Government officials and private parties (individuals and corporates) on the privatisation focus of the Rajasthan Tourism Department revealed some of the practical problems and concerns encountered in the process and identified possible solutions.

Privatisation so far is perceived to be limited to unprofitable ventures and for short term only

2.5.8 So far, the focus of privatisation is perceived to be limited to unprofitable ventures instead of offering a whole range of investment avenues for the interested parties. There is now a felt need that the profitable ventures in which private parties had evinced interest should be opened up for investment on a long term (10 years and above) basis so that the private investor is encouraged to invest in upgradation of these facilities.

Need for a clear roadmap for privatisation

2.5.9 There is a need for thorough planning in the entire process of privatisation. For example, in the case of Rajasthan the interested parties were not clear on various issues related to areas of investment, transfer of properties, time frames for investment, eligibility norms, etc. What the private sector desires is clearly identified privatisation projects that are bankable in nature and are available on a long-term basis, so that investment in these properties can take place.

Inadequate awareness about the Government's privatisation schemes

2.5.10 Past experience suggests that many interested parties were unaware of various assets available for investment. This was primarily due to marketing of related schemes to selective audience (NRIs, foreign conservationists, etc.). An active effort to conduct 'road shows' for marketing these privatisation projects across India is necessary, as this will increase the canvas of the investor profile.

No incentive to invest in currently non-profitable ventures

2.5.11 It is felt that some form of direct Government support is required especially in the privatisation of currently non-profitable ventures to a level wherein the private investor finds it attractive to come in. This has reduced the private sector confidence in such properties/ projects although inherently they have development potential with such Government support.

2.6 OTHER NON-GOVERNMENT FUNDING OPTIONS

2.6.1 Private sector investment ably supported by Government investment in core infrastructure would be the two key sources for funding of tourism projects in the state. Apart from these, following sources for funding should also be looked at for tourism projects:

- ❑ Foreign Direct Investment
- ❑ Foreign funding from bilateral and multilateral agencies
- ❑ Others (NGOs, trusts, community participation, etc.)

2.6.2 Exhibit 2.12 summarises the funding options available for various tourism projects in Rajasthan.

Exhibit 2.12

Funding Options Available for Tourism Projects in Rajasthan

Sr. No.	Type of Project	Likely Investing / Funding Parties						
		Government agencies	Domestic Private sector	Foreign Funding	Foreign (bilateral)	Foreign (Special donor agencies)	NGO	Community / Associations/ Cooperative
1	Infrastructure development at pilgrim places	4	4				4	4
2	Hotels		4	4				
3	Paying Guest Facilities		4					
4	Resorts (health, spas, water, jungle)		4	4				
5	Convention centres		4	4				
6	Restaurants and food services		4	4				
7	Amusement /Theme/ Water parks		4	4				
8	Ropeways		4	4	4			
9	Palace on Waves / River cruise	4	4					4
10	Havelis on Wheels		4					4
11	Air services	4	4	4	4			
12	Special tourist trains (Heritage trains)	4	4			4		4
13	Safaris (Camel / Elephant / Horse)		4				4	4
14	Tented camps		4					4
15	Conservation of Monuments	4	4	4	4	4	4	4
16	Museum Development	4	4	4	4	4	4	4
17	Golf Courses		4	4				
18	Rural tourism		4		4		4	4
19	Eco tourism	4	4	4	4	4	4	4
20	Adventure tourism		4	4	4		4	4
21	Handicraft marts		4				4	4
22	Cultural complexes / Shilpgrams		4	4			4	4
23	Hotel Management and Food Craft Institutes		4					
24	Water supply and sewage schemes	4	4		4			4
25	Transport terminals	4	4					

2.6.3 At every stage, there would be need for the State Government (DoT) to stimulate private investment by creating a favorable atmosphere for investment with specific tourism-related fiscal, financial and other incentives. The State Government already has a number of incentive schemes for investment in different types of tourism related projects, as indicated earlier and these incentives appear adequate in the current context. The key now is to actively 'market' the state as an attractive destination for investment in tourism industry. Additionally, depending upon the importance of the project, the DoT could also extent special concessions to the investors on a case-to-case basis depending on the state and socio-economical impact of the project.

2.7 INSTITUTIONAL FRAMEWORK FOR TOURISM DEVELOPMENT

2.7.1 There are agencies at three levels engaged in activities related to tourism development and promotion as indicated in Exhibit 2.13. The primary agencies involved directly in development and promotion of tourism are Department of Tourism, Art and Culture (DoT), Rajasthan and RTDC and RSHCL (DoT undertakings) and RITTMAN (Autonomous body)

Department of Tourism (DoT)

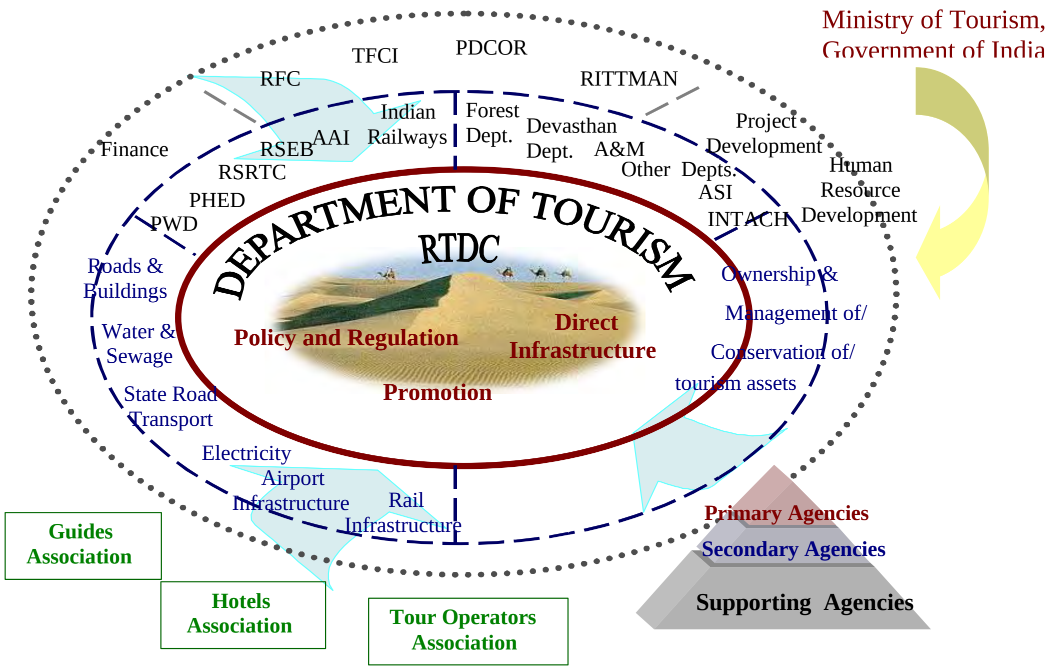
2.7.2 DoT, established in 1956, functions as an independent department within the Rajasthan State Government. Its functions include:

- Formulation and implementation of state policies and programmes related to tourism development and promotion
- Implementation of national policies and programmes related to tourism
- Co-ordination between various departments of the State Government and the private sector

2.7.3 DoT through its two state public sector undertakings, namely, RTDC and RSHCL provides accommodation and midway/ wayside facilities at various places across the state. DoT also runs the Tourist Reception Centres (TRCs)/ Tourist Information Bureaus (TIBs) at important tourist locations in the state. RTDC also organises various local, regional and state level conducted tours for visitors. Besides these, DoT also carries out/ supports various promotional activities such as organisation of Rajasthan promotion seminars in different states and countries, organisation of fairs and festivals, art competitions and exhibitions, etc.

Exhibit 2.13

Institutional Framework for Tourism in Rajasthan



Other Key Agencies / Institutions

2.7.4 These include the agencies that provide infrastructure/ support for tourism in the state, etc. as shown in the Exhibit 2.14

Exhibit 2.14

Other Agencies/ Institutions' Support for Rajasthan Tourism

Agency/ Institution	Role
State Level Institutions	
Public Works Department (PWD)	Civil works falling under roads, bridges and public buildings and also work falling under activities like improvement of water bodies Responsible for maintenance of roads and government buildings Construction and maintenance of Helipads in the state
Rajasthan State Road Transport Corporation (RSRTC)	Provides travel network (buses and bus stations) across the state
Public Health and Engg. Department (PHED)	Responsible for supply of water and management of sewage systems
Local Municipal Councils/ Municipalities and local agencies (eg., JDA for Jaipur, etc.)	Solid waste management, laying of roads and footpaths, street lighting, law and order, etc.
Urban Improvement Trust (UIT)	Construction and maintenance of Traffic circles, street lighting, slum development, laying of roads and pavements, public utilities, etc.
Rajasthan State Electricity Board (RSEB)	Responsible for electricity generation and distribution
Department of Forest and Wildlife	Ownership and conservation of protected areas and wildlife in the state
Archaeology and Museums	Ownership and conservation of archaeological wealth of the state
Devasthan Department	Ownership and management of land and property at religious places
Rajasthan Urban Infrastructure Development Project (RUIDP)	Implementation of urban infrastructure projects in Jaipur, Udaipur, Jodhpur, Ajmer, Bikaner and Kota
Central level/ National Institutions	
Indian Railways	Railway lines, stations and services
Airports Authority of India	Providing for Airport infrastructure and Airstrips
Archaeological Survey of India	Ownership and conservation of certain archaeological sites in the state
INTACH	Restoration and conservation of archaeological sites

2.7.5 Other agencies that are involved (indirectly) in the execution of tourism-related projects in the state include Rajasthan Small Industries Corporation (RAJSICO), Avas Vikas Sansthan (AVS), District Rural Development Agency (DRDA), District Collectorates (DC) and local self government bodies like Municipal Corporations, Municipal Councils, Gram Panchayats, etc. Given the nature of tourism projects, the DoT liaises with other agencies/ departments on a regular basis for planning and implementing projects related to tourism development and promotion.

2.7.6 Support Agencies of Direct Relevance to Tourism Sector include Tourism Finance Corporation of India (TFCI)- plays a developmental role within the overall policies of Government, Project Development Corporation Limited (PDCOR),- a joint sector company between HDFC, IL&FS and Government of Rajasthan, set up with the prime objective of implementing infrastructure projects in the state on a commercial format and other agencies that assist and facilitate private sector in investing in the state such as Bureau of Industrial Promotion, Rajasthan Finance Corporation, etc.

Recent Institutional Initiatives

2.7.7 As seen above, the conventional institutional framework is in place in Rajasthan to enable direct and indirect development of tourism in the state. In addition, the state has recently carried out a variety of Institutional Incentives to improve and co-ordinate tourism development in the state. The main ones are as described below.

- **Rajiv Gandhi Tourism Development Mission** has been set up in 2001 under the chairmanship of the Chief Minister to ensure the time bound development of the tourism sector.
- A **State Tourism Advisory Board** under the chairmanship of the Chief Minister has been created for handling tourism-related policies and issue guidelines for the development of tourism in the State
- A **Standing Committee** under the chairmanship of Director, Tourism and comprising heads of various institutes of hotel management and tourism faculty has been appointed for promotion of education in tourism
- **Divisional Co-ordination Committees** for tourism have been setup to look after co-ordination of various agencies at the divisional level.
- **District Tourism Promotion Committees** have also been setup headed by the District Collectors to seek more effective and active involvement of public representatives and Panchayati Raj institutions.

2.7.8 As can be seen the main thrust of these institutional initiatives is to provide an integrated decision making focus to the tourism sector in the state at a local, district, divisional and state level. These initiatives are a step in the right direction in terms of achieving better co-ordination amongst various agencies in the development of the tourism industry.

2.7.9 Given the fact that these Institutional Initiatives are already underway, the suggested focus areas for implementation are as follows:

- Need for Common Vision/ Direction
- Need for clear norms on prioritisation of identified tourism projects
- Need for avenues for public / local community participation in planning
- Need for scientific planning and monitoring of tourist movements
- Empowerment of Regional Offices of DoT and Bottom-up Approach to Tourism Planning
- Explore the opportunity for setting up of a state level equivalent of TFCI for funding tourism projects (especially in SME sector)
- Establishing a Tourism Monitoring Cell

2.7.10 With these initiatives it is anticipated that in the overall scenario, the role of DoT would be to act as a stimulus for the creation and development of a strong and vibrant tourism industry towards the socio-economic development.

2.8 TOURISM AND EMPLOYMENT

2.8.1 The economic benefit of tourism development projects have been measured in terms of employment generated directly in the tourism sector, as well as in the economy as a whole due to linkages of the tourism sector with the rest of the economy.

Exhibit 2.15

Employment Potential of Tourism in Rajasthan

Year	Incremental Tourist Expenditure (Rs. Mn)		Direct Incremental Employment	Total Incremental Employment
	Domestic	Foreign		
2002	103	53	9867	23143
2003	107	59	10540	24745
2004	111	65	11193	26299
2005	115	71	11913	28014
2006	128	90	14058	33126
2007	125	64	12001	28143
2008	131	69	12736	29880
2009	138	75	13530	31759
2010	144	82	14390	33795
2011	188	122	19831	46667
2012	147	99	15779	37159
2013	154	106	16659	39239
2014	161	113	17592	41447
2015	169	120	18583	43791
2016	177	128	19634	46280
2017	168	84	15914	37305
2018	175	88	16652	39038
2019	183	92	17426	40854
2020	191	96	18238	42759
2021	200	101	19089	44756
Cumulative Employment Potential			**305628**	**718200**

2.8.2 The forecast tourist traffic is estimated to create an additional employment potential of over 7 Lakh in the tourism industry in Rajasthan over the next 20 years, of which around 3 Lakh is estimated by way of direct employment potential and over 4 Lakh by way of indirect employment potential as indicated in Exhibit 2.15

2.8.3 Exhibit 2.16 gives the employment potential chart for various categories of tourist projects.

Exhibit 2.16

Employment Potential of Various Tourist Expenditure Areas

Category	Overall Employment Potential		Potential for Women Employment		Potential for Artisan Employment	
Accommodation						
Star/ Heritage Hotels	**High** 50-300/ unit	• Front Desk • Housekeeping • Food Service • Maintenance	**High** 5-50/ unit	• Front Desk • Housekeeping • Administration • Food Service	**Medium** 5-10/ unit	• Live performances • Souvenirs and Handicraft

Category	Overall Employment Potential		Potential for Women Employment		Potential for Artisan Employment	
		• Others (administration, travel desk, entertainment, health and beauty, etc.)		• Parlors and Salons		stores
Other Hotels	**High** 15-60/ unit	• Front Desk • Housekeeping • Food Service • Maintenance	**Medium** 5-20/ unit	• Front Desk • Housekeeping	**Low** 2-3/ unit	• Souvenirs and Handicraft stores
Paying Guest	**Low** 4-5/ unit	Basic services on offer	**High** 1-3/ unit	Can be managed by housewives	**Low**	
Dharamshalas / Dormitories	**Low** 5-10/ unit		**Low** 1-2/ unit		**Low**	
Tour and Travel Services						
Tour Operators	**High** 10-80/ unit	• Reception • Administration • Drivers • Guides	**High** 5-10/ unit	• Reception • Administration	**Low**	
Transport	**High**	• Drivers	**Low**		**Low**	
Food Service						
Restaurants	**High** 20-40/ unit	• Service • Kitchen • Helpers	**Low** 2-5/ unit	• Kitchen	**Low** 1-2/ unit	• Cultural shows (occasionally)
Wayside facility	**High** 10-20/ unit	• Service • Kitchen • Helpers	**Low**	• Kitchen	**Low**	
Recreation (Theatre, Cultural Complexes, Shilpgrams Health Resorts Health and Rejuvenation Safaris, etc.)	**High**	• Live performances • Artisans • Instructors • Safari Guides • Administration	**High**	• Live Performances • Instructors • Administration	**High**	• Live performances • Shilpgram artisans
Souvenir Shopping						
Direct: Retail	**Medium**	• Sales • Administration	**Medium**	• Sales • Administration	**Low**	
Indirect: Manufacturing	**High**	• Weavers • Craftsman • Sculptors, Potters • Smiths • Artisans	**High**	• Weavers • Craftsman • Sculptors, Potters • Smiths • Artisans	**High**	• Weavers • Craftsman • Sculptors, Potters • Smiths • Artisans
Others						
Guide Service	**Medium**		**Low**		**Low**	

Potential for Women Employment

2.8.4 Women comprise a low proportion of persons working in the organised sector of the state. A notable feature of the tourism sector is that it employs a large proportion of women, educated and uneducated, skilled and unskilled. Women are in greater numbers than men in: hotels, airline services, travel agencies, handicrafts manufacture, cultural activities, other tourism-related activities. Tourism thus offers a large potential for the employment of women and socially disadvantaged groups in Rajasthan.

2.8.5 As seen in Exhibit, the project sectors identified in the perspective plan, which offer maximum potential for employment of women are accommodation, tour and travel services and recreation. Other project sectors such as shopping also generate large direct and indirect opportunities for employment of women.

Potential for Artisan Employment

2.8.6 The projects that offer maximum opportunity for creating employment for artisans are in the recreation and souvenir-shopping category. Recreation facilities like theatres, cultural complexes and Shilpgrams, etc. offer maximum opportunities for employing the local artisans.

2.8.7 To maximise opportunities for local participation, training programmes need to be made available to residents of the state, especially younger people. To the extent possible, these employment opportunities should be met through the local populace/ community and only specialist positions recruited from outside the state. The key objective should be to achieve high and appropriate tourism standards. Training programmes can raise the skill base of the industry and thereby contribute to the delivery of quality tourist experiences

2.9 TOURISM AND ENVIRONMENT: ISSUES IN RAJASTHAN

2.9.1 Tourism activity like any other industry has the potential to disturb the environment of the native place. This could be in the form of increased air, water and noise pollution, destruction of the social and cultural fabric of the native place, disturbance/ destruction of the natural biodiversity of the place, etc. Exhibit 2.17 gives an illustrative list of environmental issues that may arise due to increased tourism activity in Rajasthan as is forecasted over the next 20 years.

Exhibit 2.17

Tourism and Environment Issues in Rajasthan

Environmental Issue	Connection to tourism	Environmental problems arising from / addressed by
Negative effects of increased tourism activity		
Changes of biological resources	Tourism activities such as hunting, fishing, camping and other sports may lead to depletion of ecosystems and species	• Loss of biological diversity • Soil contamination
Land use and environmental restructuring	Construction of roads, hotels, resorts, ropeways and other infrastructure	• Loss of biological diversity • Soil erosion
Waste discharge in water, air and land	Increase in the number of persons in tourism areas leads to increase in amount of waste	• Air pollution • Water pollution • Soil contamination
Water use for human activities	Increased consumption of sparse resources during tourism seasons	• Resource scarcity
Energy production and consumption	Tourism will lead to increased use of various means of transport	• Greenhouse effect • Destruction of ozone layer • Air pollution
Human health and environmental disasters	Emission of noise and gases from traffic will affect human health and	• Noise pollution • Air pollution

Environmental Issue	Connection to tourism	Environmental problems arising from / addressed by
	increase destruction of buildings of cultural value	
Positive effects of increased tourism activity		
Resource Management	Increased income from tourist may lead to better resource management Tourist interest in flora and fauna may lead to an increase in area of natural reserves	• Loss of biological diversity • Soil contamination and erosion
Pollution monitoring and control	Demand from tourists for good quality drinking water, etc. may lead to better monitoring	• Water pollution • Air pollution • Noise pollution
Effects of environment quality on tourism activity		
Ecosystems inventories	Ecosystems such as forests, deserts, wetlands, etc. will influence tourism demand	• Resource scarcity • Loss of biological diversity
Lithospheric and hydrological systems	Topography, soil type, amount of precipitation will influence tourism demand	• Soil erosion • Resource scarcity
Atmospheric system	Temperature and air pollution may influence tourism demand	• Air pollution

2.9.2 Although a generic environment legislation is present in Rajasthan, there is currently no legislation that deals with the direct effects of tourism activity on the environment of the native place.

Eco-tourism in Rajasthan: Key Issues

2.9.3 Eco-tourism is generally described as 'tourism associated with protected areas'. Eco-tourism, a form of nature based tourism, aims to be ecologically, socio-culturally, and economically sustainable while providing opportunities for understanding and appreciating the natural environment. The three elements of Eco-tourism in Rajasthan perspective could be identified as:

- Focus of attraction is natural environments (e.g. wetlands or deserts) or specific components thereof, such as a particular type of animal or plant.
- Emphasis is on learning as an outcome of the interaction between tourists and natural environment. Eco-tourism is therefore differentiated from a generic nature-based tourism that are more *leisure based* or those that are *adventure oriented*.
- Sustainability which ensures that the integrity of those places is not undermined whilst understanding and appreciating natural attractions.

2.9.4 A total of 20 Eco-tourism projects to be implemented in the next 5 years have been proposed by the Rajasthan Forest Department. The estimated spend on the projects is close to Rs. 574 Lakhs with almost 50% investment coming in the first two years.

Tourism Destinations in Rajasthan–Degree of their Environmental Sensitivity

2.9.5 The main tourism destinations and the degree of their environmental sensitivity are provided in the Exhibit 2.18

Exhibit 2.18

Environmental Sensitivity of Various Tourist Destinations in Rajasthan

Location	Eco Sensitivity	Key Issues/ Concerns
Jaipur	High	• Air pollution due to increased vehicular traffic • Scarcity of drinking water • Problem of effluent discharge and waste management • Depletion of natural areas due to construction activity
Ajmer	High	• Potential threat to Ana Sagar and Foy Sagar due to increased usage of lake water • Air pollution due to increased vehicular traffic • Problem of effluent discharge and waste management
Pushkar	High	• Pollution of the Pushkar Lake and surroundings • Improper sewage disposal during the Pushkar fair
Jaisalmer	High	• Problems of sewage disposal affecting the foundation of the structures of the fort and its precincts
Sariska NP	High	• Increased vehicular traffic will disturb the natural habitat of wildlife in the park • Destruction of vegetation due to increased tourist activity
Keolodeo NP	High	• Increased vehicular traffic will disturb the natural habitat of wildlife in the park
Ranthambhor TR	High	• Increased vehicular traffic will disturb the natural habitat of wildlife in the park • Destruction of vegetation due to increased tourist activity
Udaipur	High	• Increased commercial activity around the lakes due to conversion of residential places into hotel accommodation further leading to discharge of effluents in the lakes • Air pollution and congestion due to increased vehicular traffic
Mount Abu	High	• Air pollution due to increased vehicular traffic • High pressure on carrying capacity of the hill station
Desert National Park	Medium	• Disturbance/ destruction of the natural habitat of Desert National Park
Siliserh	Medium	• Contamination of lake water due to tourism sports and discharge of waste
Rajsamand	Medium	• Water pollution due pilgrims bathing and waste discharge from the nearby temple
Banswara & Dungarpur	Medium	• Threat to tribal habitat due to increase tourist arrival and associated commercial activity
Others locations	Low	

2.9.6 Tourist destinations that have high degree of environmental sensitivity are places of high tourist visitations. They face potential environmental threat due to pressure on civic amenities, especially the natural resources. The main destinations of growing environmental concerns due to increased tourism activity are the National Parks and Wildlife Sanctuaries that fall on the eastern border of the state.

2.9.7 Very few directly polluting investments have been proposed in the perspective plan and there is no significant negative impact on the environment and ecology. In fact, eco-tourism projects suggested in the perspective plan would be a big step towards generating interest towards ecological issues. Improved sewerage and drainage facilities would contribute positively to the ecology and hygiene levels at the places of tourist interest. At a broad level, it would also enhance the overall tourist experience. For example, improvement in the public amenities, monument landscaping site enhancement, cleaning of water bodies, and plantation of greenery will have a beneficial impact on the environmental of the cities.

Suggested Environmental Controls for Tourism Projects in Rajasthan

2.9.8 Given Rajasthan's increasing popularity as a tourism destination with foreign as well as domestic tourists and the growing popularity of tourism concepts such as nature tourism, eco-tourism, rural tourism, it is necessary to outline specific environment controls framework to ensure sustainability of tourism.

2.9.9 With proper ecological environmental controls, the threat to ecological balance could be mitigated. Some of the controls would be as mentioned below:

Forest Areas

- Restricting development of facilities (roads, hotels, etc.) inside the protected areas. Allowing bare minimum civic amenities inside the protected area
- Restricting vehicles movement within the protected areas
- Wherever possible, creating walk-ways, pre-marked nature trails, etc. that would aide smooth tourist flow within the protected areas and ensure less tourist nuisance

Tourism Projects/ Products

- Hotels: Subsidy on installation of ETPs & solid waste management system, subsidy on installation of renewable energy equipment (solar cell, biogas, etc.)
- Water tourism: Demarking only non-sensitive areas for water sports activities

Urban Agglomerations

- Development of region in a pre-planned manner so as to avoid concentrated tourist activity in a particular place thereby reducing the pressure on natural resources. For example, develop tourist infrastructure in vacant areas around the main cities to reduce demand on the city's civic infrastructure and resources.
- Devise a plan for effective collection, treatment and discharge of effluents from settlements within the walled cities in the state. For example, Jaipur, Udaipur, Jaisalmer, etc.
- Conservation of old/ walled cities through restriction of polluting vehicles within the precincts and by architectural controls and/ or restriction on new construction activity within these old/ walled cities
- Soil conservation activities such as plantation, afforestation, etc. to be made mandatory for new tourism projects.

Carrying capacity enhancement

2.9.10 The over consumption of resources by tourists and tourism infrastructure is incompatible with sustainable development. The carrying capacity at several places like Ajmer, Mount Abu, Jaipur, Udaipur in Rajasthan has exceeded with the increase of tourist inflow. There is a risk of tourist demand for resources (land, water, energy) competing with the needs of local population thereby increasing social inequality and injustice.

2.9.11 Tourism in Rajasthan, which was mainly mass tourism in the past was 'producer driven'. The industry today is becoming increasingly consumer-driven. A well informed, responsible tourist is putting increasing pressure on the tourism industry to behave more responsibly. As a result, the industry is aligning itself to address issues of carrying capacity.

2.9.12 The issue of carrying capacity has often been addressed by developing alternate tourist locations, thereby redistributing the tourist activity. However, this is easier done with activity driven tourism. Given the nature of tourism in Rajasthan, which is more passive (sight seeing), it would be difficult to address the issue of carrying capacity purely by creating or promoting new locations. Existing locations such as Ajmer, Jaipur, Udaipur would continue to attract a large number of tourists arriving in the state due their importance.

2.9.13 Tourism industry in Rajasthan lacks information on the requirements of sustainable tourism and on how to integrate economic interests with environmental and social requirements. While the tourism industry in Rajasthan may be willing to improve their products and services, there would be an imminent conflict between the industry's pursuit of economic gains and social and environmental responsibility.

2.9.14 Consumer behaviour in tourism is both a product and the cause for change in policies by the government and industry. Therefore, a comprehensive approach is required to solve the problems associated with market-driven tourism. Some of the recommendations that would influence tourist consumer behaviour are as provided below:

- Presently the usage of mass media to promote tourism in Rajasthan is restricted to advertisements, painting images of destinations rather than providing relevant information for potential travellers. Mass media can be effectively used to influence travel decisions and consumer behaviour in the destinations.
- There is a lack of reliable and appropriate research data on the determinants of tourist demand, motivation and behaviour. Statistics should be maintained and, if required, periodic researches undertaken to assess emerging tourist trends and identify sustainable alternatives.
- The key to develop effective partnerships in tourism industry in Rajasthan is to remove the imbalance in power between the different stakeholders. The tour operator and guides wield a considerable influence on the tourist flow and activity in the state. As a result most tourist activity in the state is concentrated in a few pockets. Hotels established outside the main tourist hubs attract only foreign tourist groups. Tour operators should be educated on the importance of carrying capacity and the need to spread the tourist activity away from the congested places.

2.9.15 The most obvious of the instruments and remedial measures available are:

- Legal measures: Rules and regulations that monitor the growth of tourism infrastructure at a particular place or an area. This could be mainly in form of restriction on the construction of new hotels and other accommodation facilities.
- Market based instruments such as taxes to influence market prices of tourism products and services.
- Industry self-monitoring: A self imposed code of conduct across the tourism industry participants like hotels, tour operators, guides, taxi operators, etc.
- Good local transport facilities: To ensure tourist movement away from the hubs, it is essential that adequate and affordable local transportation facilities must be provided for the tourists.

2.10 STRATEGIC ACTION PLAN

2.10.1 The Strategic Action Plan for Tourism Development in Rajasthan should focus on the following:

- Creation of New Circuits/ Destinations
- Creation of New Tourism Products
- Tourism as a Vehicle for Area Development
- Creation of Tourism Relevant Direct Infrastructure
- Exploiting Opportunities to Increase Tourism Revenues
- Tourism Marketing

2.10.2 Each of these entails a range of activities which are summarised below:

Action Plan Focus: Destinations and Circuits

STRATEGY	ACTION
Promote lesser explored destinations	• Provide basic tourist infrastructure and reliable services at these destinations • Establish local level marketing association jointly with the private sector to design specific marketing and promotion incentives and activities
Promote lesser explored circuits	• Initiate joint marketing and promotion action with Central Govt. and neighbour states wherever opportunity exists. For example, Hadoti and Vagad circuits • Looking at the tourist response, provide upgraded and new amenities and services to meet their needs

Action Plan Focus: New Tourism Products

STRATEGY	ACTION
Renew tourist interest in the state by creating new tourism concepts and products	• Identify sites and their potential to develop specific 'tourism products' • Create tourism magnets based on the recreational activities, family entertainment and leisure facilities • Explore possibility of developing new products like 'Boutique' resort tourism, archaeological tours related to ancient sites, tribal culture tours
Creation of Tourism Zones for Specific Tourism Products	• Desert Circuit could be developed and marketed for 'Adventure' and 'Rural' tourism • Ajmer-Pushkar Circuit could be developed as a 'Religious' Tourism Zone, offering integrated pilgrim infrastructure • Jaipur-Alwar-Sariska could be developed and marketed as 'Ethnic n Corporate' zone, with a greater focus on weekend and conference/ incentive tourism given its proximity to Delhi • Kota-Bundi could be developed and marketed as an undiscovered 'Nature and Heritage' zone

Action Plan Focus: Area Development through Tourism

STRATEGY	ACTION
1. Integral Development of	• Improve civic infrastructure in Ajmer and Pushkar (water, power, roads exportation)

STRATEGY	ACTION
Ajmer-Pushkar	• Undertake comprehensive 'clean and green' Ajmer-Pushkar programme by focusing on solid waste and sewage disposal, water supply, drainage, lake cleaning and city beautification • Reduce traffic-related air pollution by imposing restriction on vehicle movement within the city • Implement landscaping at key tourist attractions in the cities
2. Create low-impact, non-degrading tourist infrastructure in the region	• Encourage spreading of tourism activity outside Ajmer-Pushkar by imposing restrictions on Hotel construction in the towns • Aggressively promoting new tourist destinations around Ajmer-Pushkar and diverting the tourists to these places by providing basic tourism infrastructure • Decongestion of roads by restricting vehicular traffic near the pilgrim centres.
3. Increase avenues to generate income from tourist activities	• Encourage construction of mid-priced and luxury hotels in the region • Creation of entertainment and leisure facilities in the region. • Developing domestic airport and introducing regular air-services to Ajmer. • Promote the proposed airport as a gateway airport for tourist indenting to cover multiple tourist circuit in the state. • Build the promotional campaign of Ajmer-Pushkar around the theme of 'Gateway to the heart of Rajasthan'.

Action Plan Focus: Tourist Infrastructure

STRATEGY	ACTION
1. Enhancement of Connectivity infrastructure	• Prioritise airport projects. For example, Jaipur Airport upgradation, New Airstrips at Ajmer • Encourage charter air service companies to supplement scheduled services • Private sector participation in providing last-mile connectivity to the attractions • Identify and prioritise railway network upgradation and modernisation programme, with special attention given to routes linking tourist regions, destinations and centres • Upgraded/international standard tourist taxi/coach services • Introduce metered taxi/rickshaw services in main cities
2. Provide high quality hospitality experience	• Solicit foreign investment in hotels segment • Inculcate aspects of traditional hospitality in the service offered by the hospitality industry
3. Enhanced tourist experience as they move around in the state	• Provide navigational aids on all tourist routes (e.g. signage and information on wayside facilities) • Provide upgraded / standardised tourist facilities (restaurants, models, TRCs, wayside facilities, etc.) • Provide site interpretation aids at all tourist places • Ensure availability of organised guide services at important tourist location.

Action Plan Focus: Increasing Tourism Revenues

STRATEGY	ACTION
1 Extension of tourist	• Develop seasonal themes and product packages of experience appropriate

STRATEGY	ACTION
season in the state	to different seasons
2. Increase Average length of Stay (ALOS) of tourist in the state.	• Reviewing and remodeling of local sight seeing tours to extend duration of stay at a place • Focussed marketing of lesser explored tourist attractions around the place to make them an inevitable part of the local sight seeing itinerary • Convince tour operators and guide to standardise itineraries to avoid unhealthy competition • Create new attractions and tourism products
3. Increasing daily span of tourist activity	• Introduce events in the evening • Popularise site-visitation after sunset • Activities for the tourist leisure time 1. Passive – Parks & Gardens, Fountains, Lighting of Monuments 2. Active – Shopping, live performances, food festivals, food plazas / food courts, light and sound shows
4. Increasing daily tourist spends	• On travel: Example, novel concepts like Open top/ Glass top/ double decker buses • On accommodation: Example, help tourists upgrade from economy to mid-priced / luxury hotels • On food and beverages: Example, specialty and fine dining restaurants, food courts, local cuisine restaurants • On recreation: Example, theatre, music and dance performances • On Shopping: Example, shopping arcades, handicrafts and souvenir stores. • Others: Example, entry charges at tourist location, charity for conservation causes
5. Attract specific interest / high yield tourists	• Create and target specific products to special interested tourist groups such as Honeymoon package, Adventure package, Nature lovers package, etc. • Identify special interest groups and market products through appropriate channels – Segmentation, Targeting and Positioning.

Action Plan Focus: Tourism Marketing

STRATEGY	ACTION
1. Research based marketing and promotion campaign	• Constitutionalise a market research and monitoring cell • Establish a system of collection and analysis of statistics related to tourist arrival in the state • Co-ordinate / co-operate with the Central Governments programme of detailed market research in key markets of Europe and Asia • Design./ Create specific activities targeted at segments and riches for which products have been developed
2. Reorganisation of Tourism promotional activity in the state.	• Establish joint- sector promotion body ensuring effective representation of all tourism shareholders • Co-ordinated marketing efforts with the Central government and with other states • Standardisation of communication material • Developing consistent sales training and product education for personnel at customer touch points • Building close working relationship with the carriers and wholesale inbound operators
3. Attracting new	• Focus on MICE segment (Meetings, Incentives, Convention and

tourist categories / groups	Exhibition) and Creation of convention centres • Developing spin-off business from major national and international events and activities particularly in Delhi • Niche tourism activities like Eco-tourism and Rural tourism.

Conclusion

2.10.3 Thus, as seen above there is a strong need to have a holistic approach to tourism development, which is sustainable, participative and responsible leading to overall development of the state. Rajasthan already has a well-developed tourist infrastructure amongst Indian states as well as a new Tourism Policy and institutional initiatives aimed at harnessing the tourism opportunity in the future. The key challenge ahead is to ensure that the on-going and proposed tourism projects dovetail into the overall tourism objectives of the state to offer a contemporary range of tourist experiences (besides the traditional tourist experiences that Rajasthan is known for). This will enable Rajasthan to retain its prominent position in Indian tourism scenario in the future.

CHAPTER 3 :

OVERVIEW OF RAJASTHAN STATE

This chapter contains

- Background of Rajasthan
- Major economy sectors of the state
- Administrative divisions and district profiles
- Infrastructure in the state
- Major state government initiatives / incentives

3.1 BACKGROUND

3.1.1 The formation of Rajasthan in its present form has come in gradual states after the independence of the country. The present state of Rajasthan is effectively a union of 22 former princely states.

3.1.2 Rajasthan has a total area of 0.342 Sq. Kms, making it geographically the largest state in the country. The state shares its geographical boundaries with the states of Punjab, Haryana, Uttar Pradesh, Madhya Pradesh and Gujarat in India, and also has a long 1,070-Kms west boundary with India's neighbouring country Pakistan.

3.1.3 The topography of Rajasthan mainly comprises of three regions, namely, the Aravalli hills range, the Great Indian Thar Desert and the eastern part of the state. Aravallis, one of the oldest mountain ranges in the world stretches from Mount Abu in the south-west to Kota and Bundi in the east. The arid Thar Desert lies to the north-west of the state and is characterised by shifting sand dunes and high summer temperatures. Rainfall and soil fertility increases towards the eastern part of Rajasthan bordering Uttar Pradesh and Delhi. This region of cultivable land is also interspersed with rocky mountains near Jaipur and Bharatpur.

3.1.4 Although Rajasthan is the driest region in India, there are considerable contrasts in the climatic zones in the state. Except in the hills, the summer temperatures are as high as 46^{o}C and minimum of 25^{o}C (average of 38^{o}C). In winter, the daily maximum in most low-lying areas is between 22^{o}C and 28^{o}C with the minimum being between 8^{o}C and 14^{o}C.

3.1.5 The average annual rainfall in the state is close to 420 mm. Parts of the western desert receive very little rain, on average only 100 mm per year. The Aravalli range tends to experience a higher rainfall and lower temperatures throughout the year. To the south-west there is higher rainfall and marked humidity.

3.1.6 The population of the state is around 56.5 Mn according to the 2001 census and constitutes nearly 5.5% of the nation's population. The decennial rate of growth of population in the state at 28.33% for the period 1991-01, is higher than the all-India average.

3.1.7 The population density of the state is 165 persons per Sq. Kms. It varies from region to region, ranging between 13 persons per Sq. Kms in Jaisalmer (desert region) to 471 persons per Sq. Kms in Jaipur (east region).

3.1.8 Overall literacy level in the state as per the 2001 census is 61%. 76% of males are registered literate whereas female literacy is 44%. Tribals constitute 12% of the state population, nearly double the national average.

3.1.9 The principal language is *Rajasthani*, the four important dialects being *Marwari* in the west, *Jaipuri* in the east, *Malwi* in south-east and *Mewati* in north-east. *Hindi* is widely spoken and is rapidly replacing *Rajasthani* as the lingua franca.

3.2 MAJOR ECONOMY SECTORS

3.2.1 Rajasthan is a predominantly agrarian state where agriculture contributes more than 40% to the State Domestic Product. About 75% of the population lives in rural areas and is dependent on farming. The main crops of the state are food-grains, pulses and oilseeds.

3.2.2 Rajasthan is abundant in mineral wealth and holds a share of 24% in the total national production of non-metallic minerals. Rajasthan accounts for India's entire output of zinc concentrates, emeralds and garnets. The state is a major contributor to the country's production of gypsum, silver ore, asbestos, feldspar and mica, and has rich salt deposits at Sambhar and copper mines at Khetri and Dariba. Building stones like sandstone, marble, kotastone and granite in different colours are produced in large quantities in the state.

3.2.3 Rajasthan also has an emerging industry sector, the main industries being textiles, manufacture of rugs and woollen goods, vegetable oils and dyes. Traditional handicrafts such as jewellery, marble work, embossed brass, block printing, embroidery, pottery and decorative paintings are good foreign exchange earners for the state.

3.2.4 Heavy industry in the state includes manufacture of railway rolling stock, copper and zinc smelting. The chemical industry produces caustic soda, calcium carbides, fertilizers, pesticides and insecticides. The principal industrial clusters in the state are at Jaipur, Kota, Alwar, Udaipur and Bhilwara.

3.2.5 Another sector that has always played an important role in the state economy, particularly during the last few decades is tourism. Rajasthan's tourism industry has seen a strong growth in both the domestic and international tourist arrivals over the decades. The State Government has declared tourism as an industry. The industry employs over one-lakh persons directly and over three lakh indirectly.

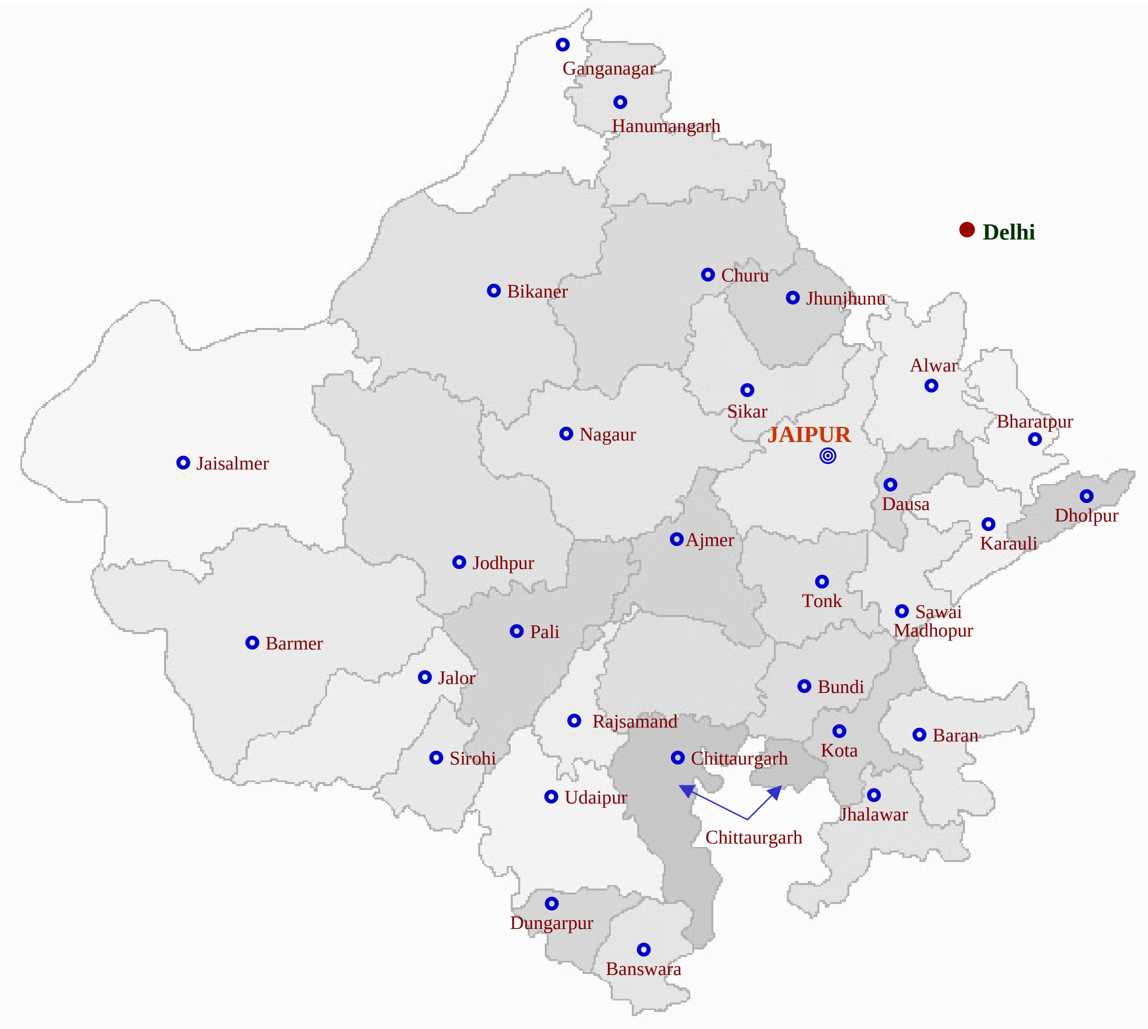
3.3 ADMINISTRATIVE DIVISIONS AND DISTRICT PROFILES

3.3.1 Rajasthan has been administratively divided into 6 divisions comprising 32 districts, 241 tehsils, 222 cities/ towns and 9189 village panchayats. The divisional headquarters of the 6 administrative divisions of Rajasthan are Jaipur, Bikaner, Jodhpur, Udaipur, Alwar and Kota.

3.3.2 Exhibit 3.1 provides a map of Rajasthan depicting the various districts in Rajasthan.

Exhibit 3.1

Districts and District Headquarters in Rajasthan



3.3.3 As seen in the Exhibit, Jaisalmer, with an area of 38401 Sq. Kms., is the largest geographical district, whereas, Dholpur with an area of 3034 Sq. Kms is the smallest district in the state.

3.3.4 In terms of population, Jaipur is the largest state with population of approx. 5.2 Mn, followed by Alwar (approx. 3 Mn), Jodhpur (approx. 2.9 Mn), Nagaur (approx. 2.8 Mn) and Udaipur (approx. 2.6 Mn). Jaipur also has the highest population density (471 persons/ Sq. Kms.) in the state.

3.3.5 The major urban agglomerations in the state having more than 5-lakh population are Jaipur, Jodhpur, Kota, Bikaner and Ajmer, Jaipur being the largest city with a population of 2.3 Mn. Other over lakh-population cities in the state include Udaipur, Ganganagar, Bharatpur, Pali, Sikar, Tonk, Hanumangarh, Beawar, Kishangarh and Jhunjhunun.

3.3.6 The main cities/ towns of tourist importance in the state include Jaipur, Jodhpur, Ajmer, Bikaner, Jaisalmer, Udaipur, Chittaurgarh, Alwar, Bharatpur, Sawai Madhopur and Mount Abu.

3.4 INFRASTRUCTURE IN RAJASTHAN

3.4.1 Rajasthan State Government has been increasing its plan outlays for infrastructure development over the past five-year plans. The state 9th Five Year Plan (FYP) outlay constituted an increase of 139% over that of the 8th FYP, and accorded over 75% of the total outlay solely for infrastructure development. The areas of 9th FYP outlay included power (33% of total outlay), transport (13.5%), irrigation (14.5%), social infrastructure (37.5) and tourism (1.5%).

Basic Infrastructure

Power

3.4.2 Although the total installed power generation capacity in the state has increased substantially from 13 MW in 1950-51 to over 4000 MW in 2001-02, Rajasthan yet lacks self-sufficiency in power generation to meet its current power demands. The peaktime power deficit in the state was estimated at 920 Mn Kwh.

3.4.3 The main sources of power supply to Rajasthan are Kota and Suratgarh Thermal Power Plants, Mahi Hydel Project (in Rajasthan), Bhakra, Beas (in Punjab), Chambal (in Madhya Pradesh) and Satpura projects (in Chhatisgarh). Out of the total energy generated in the state, over 95% is generated at the two thermal power plants at Kota and Suratgarh. Apart from the power generated in the state, Rajasthan also draws power from the central power grid.

3.4.4 Agriculture accounts for nearly 40% of the total electricity consumption in Rajasthan. Industrial and commercial establishments account for 33%, whereas, domestic consumption accounts for 18% of the total electricity consumed in the state.

3.4.5 Rajasthan has been recognised as one of the two leading states, which have vigorously pursued Power Sector Reforms. Substantial private sector investment in power generation is being encouraged. Captive power plants have been freely permitted. No permission from RSEB is required. The State Government has also announced a Captive Power Plant Policy.

Transport Infrastructure

3.4.6 In terms of transport infrastructure, Rajasthan has developed a good functional road and rail network. Although presently adequate, the air transport network in Rajasthan is limited given the vast geographical expanse of the state.

3.4.7 The total road network in Rajasthan increased more than eight-fold from 1950-51 to 2001-02. The total road length in the state is estimated to be around 150813 Kms at the end of 2001-02, of which approx. 66% (including other department roads) would be surfaced roads and balance being unsurfaced roads.

3.4.8 The density of roads per hundred Sq. Kms. is approx. 44 Kms. This is, however, still below the all India average of approx. 75 Kms of road per Sq. Kms. The total road network is expected to have connected over 45% of the total inhabited villages in the state at the end of 2001-02.

3.4.9 Five National Highways (NH), namely, NH8 (Delhi-Ahmedabad), NH11 (Agra- Bikaner), and NH12 (Jaipur-Bhopal), NH14 (Beawar-Sirohi-Radhanpur) and NH15 (Bhatinda-Kandla), measuring approx. 4,600 Kms, pass through the state. These connect major cities in the state, including most important tourist cities/ hubs in all the main tourist circuits. The NH8 from Delhi to Bombay via Jaipur-Ajmer-Udaipur-Ahmedabad is being converted into a six-lane highway under the Prime Minister's Golden Quadrilateral programme.

3.4.10 Besides these, there is a good network of State Highways (around 8600 Kms) and Major District Roads (around 5700 Kms.) providing connectivity between various important cities/ towns in the state.

3.4.11 The State Government has promulgated a Road Policy in 1995 to facilitate private sector participation in construction of toll roads, bridges and by passes. Private sector participation in Road sector is being actively encouraged.

3.4.12 The RSRTC and a large number of other private service providers provide the road transport infrastructure in the state. Given the extent of tourism activity in the state, this infrastructure is sufficient and well managed.

3.4.13 The rail network in Rajasthan mainly falls under the Western and Northern Railway zones. A small section of track also falls under the Central Railway zone. The total length of railway routes in the state by the end of March 2000 was 5,920 Kms. Out of the total network, 3,028 Kms. is covered under broad gauge, 2,803 Kms. under metre gauge, 89 Kms. under narrow gauge and a small stretch of 491 Kms. (from Gangdhar to Bharatpur) is also electrified. The total railway route length per 1000 Sq. Kms. of geographical area is 17 Kms vis-à-vis the national average of 19 Kms.

3.4.14 Two major trunk lines connecting the northern and western corridors of the country, namely Delhi-Ahmedabad and Delhi-Mumbai pass through the state. These connect various important cities in the state such as Jaipur, Ajmer, Abu Road, Bharatpur, Kota, Sawai Madhopur and others, with important metros and cities in other states. Similarly, the major cities in the state also have fairly good connectivity with a few cities in south India and in east India, particularly Kolkata.

3.4.15 Jaipur, Jodhpur, Bikaner, Kota, Sawai Madhopur and Bharatpur are the major rail junctions in Rajasthan that are on the broad gauge network. Udaipur, the most important city and tourist hub in Southern Rajasthan is however, on a metre gauge network.

3.4.16 Under the uni-gauge scheme of the Railways, the State has several ongoing and proposed programmes for conversion of metre gauge lines into broad gauge. Most of the metre gauge lines have already been converted, and all the major cities of the state, except Udaipur and Bhilwara, have been linked with broad gauge. Jaipur has been linked to major industrial cities like Mumbai, Calcutta, Chennai, Hyderabad, Delhi, Indore and many other towns. Efforts are being made to ensure that Bhilwara and Udaipur are also connected with broad gauge expeditiously. The proposal to provide rail link to Bhiwadi on priority is being pursued with the Railways.

3.4.17 Given the vast expanse of the state, air connectivity could play a major role in making intra-state long distance travel time efficient. The present air connectivity serves the need for entry into the state (and three major geographic divisions) via three major cities, namely, Jaipur, Jodhpur and Udaipur.

3.4.18 Apart from the above three airports operating regular commercial flights, Rajasthan has a total of 19 airstrips and 128 helipads though it should be noted that only a few are operational by way of scheduled commercial terminals.

3.4.19 Indian Airlines and Jet Airways have a regular air service from Mumbai and Delhi to Jaipur, Jodhpur and Udaipur. Jaipur Airport is being upgraded to an International airport and recently, Indian Airlines has initiated a flight service from Jaipur to Dubai (via Delhi) from February 2002. The other two airports viz., Jodhpur and Udaipur only have domestic flights from/ to Mumbai and Delhi.

3.4.20 Air Taxi Operators (ATOs) are being encouraged to expand their services in the state. The use of State Government's existing airstrips numbering 19 and some other facilities has already been offered to ATOs so as to facilitate their operations.

Communication

3.4.21 The communications facilities in the state have been growing speedily in the recent years. The total number of post offices in the state was 10,416 including 9,607 in the rural areas and 809 in the urban areas at the end of 2001-02. Thus, the average area and population served by each post office were 33 sq. Kms. and 5,422 persons respectively. Telegraph facilities are also provided by 2,310 offices.

3.4.22 The number of telephone exchanges in Rajasthan was 2,061 at the end of 2001-02. The state had 13.26 lakh telephone connections as of March 2001 including over 56,700 public call offices (PCOs). The total cellular subscriber base in the state was 66,000.

3.4.23 Special efforts are being made to provide efficient and reliable telecommunication facilities in industrial areas. Cellular phones facility, which is available only in select areas in the State, is proposed to be introduced in other industrially important locations like Alwar, Bhiwadi, Pali, Beawar, etc.

Urban Infrastructure Development

3.4.24 The State Government has sanctioned integrated urban development project for six towns with a cost of Rs. 1529 Cr. The Asian Development Bank is financing this project by sharing 69% of the project cost as a loan, and the rest will be shared by the Government and Urban Local Bodies. It is proposed to upgrade and expand the infrastructure facilities of water supply, sewerage, solid waste management, drainage, urban roads and traffic management, fire services, etc. in six principal towns of the state, namely, Jaipur, Jodhpur, Kota, Udaipur, Ajmer and Bikaner. The project is likely to be completed by December 2004.

Social Infrastructure

Education

3.4.25 Rajasthan has shown a substantial change in primary education and literacy in recent years. The literacy rate has jumped up from 38.55% (1991 Census) to 61.03% (Prov. 2001 Census).

3.4.26 There are over 18,000 pathshalas, around 40,000 primary and 22,500 upper primary schools functioning in the state. Rajasthan also has 280 colleges providing higher education. In the field of higher education, the state has 9 universities, which include 4 in general education, one in Sanskrit, one in National Law, two Agricultural universities and one Open University. The state also has close to 170 institutes imparting professional and technical education.

3.4.27 This education infrastructure is supported by various policy initiatives and specialty institutes and programmes aimed at achieving specific human resources goals of the state.

Health and Medical Facilities

3.4.28 Medical and health services in the state are being provided through a network of government institutions in the state. Rajasthan has around 220 government hospitals with total bed strength of approx. 38,000. Apart from this, the government has also provided a large number of dispensaries, health centres, maternity and child welfare centres and aid posts throughout the state. The total number of doctors working with government hospitals and health care centres is close to 6,100 making a ratio of 160 doctors per 1000 beds.

3.4.29 The state also has close to 85 hospitals and around 3,700 dispensaries providing healthcare and medical facilities in the field of alternative medicine e.g. Ayurveda, Homoeopathy, Unani and naturopathy. The total number of beds in such healthcare institutions is around 1,200.

Water Supply / Drinking Water

3.4.30 Given its topography (Thar Desert in the West and arid regions elsewhere), large parts of Rajasthan are water scarcity prone especially during the summer months. Geographical diversity and limited availability of both ground and surface water has aggravated the problems of drinking water in the state.

3.4.31 Rajasthan receives water from the Punjab rivers and also from the Western Yamuna (Haryana) and Agra canals (Uttar Pradesh) and from the Sabarmati and Narmada Sagar projects in the south. The state also shares the Bhakra Nangal project with Punjab and Chambal Valley project with Madhya Pradesh.

3.4.32 By the end of December 2001, all 222 cities and almost 99% of the total inhabited villages have been provided, partially or fully, with the facility of drinking water. Drinking water has also been made available to about 49,800 dhanis (small settlements). Drought prone areas of Bikaner, Jaisalmer and Barmer in western and northwestern Rajasthan have been benefited by the twin canals of Indira Gandhi Nahar Pariyojana (IGNP) which carry water from the Sutlej and Beas rivers in Punjab.

3.5 MAJOR STATE GOVERNMENT INITIATIVES

3.5.1 Rajasthan is one of the faster growing state economies in the country. During the past five years the average growth rate of investment in the large and medium sector has been 33% and in the SSI sector over 15%. Over the same period, exports from the State have grown at an annual average rate of 53%.

3.5.2 The principal objective of the Rajasthan Government now is to 'make Rajasthan the most preferred state for investment in the identified sectors and to ultimately achieve global competitiveness'. Towards this end, infrastructure development, with active participation of the private sector, has been identified as one of the key focus areas.

3.5.3 In order to encourage private sector investment in infrastructure development projects, the Government of Rajasthan has adopted a three-pronged strategy:

- Creating an Enabling Policy Framework through Economic Reforms
- Strengthening the Industrial framework/ New Enabling Institutions
- Demonstration Projects

Enabling Policy Framework through Economic Reforms

3.5.4 Rajasthan has been in the forefront of Economic Reforms. It was the first State in the country to adopt the International Competitive bidding route for setting up power projects. The State Government has also enacted the Power Sector Reforms Bill for the unbundling of the operations of Rajasthan State Electricity Board (RSEB). The creation of the State Electricity Regulatory Commission (SERC) and privatisation of power distribution are other major initiatives in the Power Sector.

3.5.5 Rajasthan also become the first state to announce a State Road Policy, facilitating the entry of private enterprise in the roads sector. The Government has amended the laws to enable private investment and collection of tolls. A model concession agreement has also been drafted for inviting the private sector to develop roads on Build Operate Transfer (BOT) basis.

3.5.6 Besides power and roads, the state is also seeking private sector participation in setting up of and maintenance of industrial areas, including specific social infrastructure projects in these areas. The private sector is also invited to set-up Inland Container Depots (ICDs) and Export Processing Zones (EPZs) in the state.

3.5.7 Tourism is a focus sector in Rajasthan. Private sector investment is encouraged in the development of tourism products like hotels / resorts, amusement parks, water parks, museums, golf courses, etc. A new Tourism Policy formulated in 2001 simplifies the rules for allotment and conversion of land for tourism units as well as provides incentives for private sector investment in tourism infrastructure in the state. A programme for the privatisation of RTDC properties is also underway. (A detailed discussion on the various tourism-sector related initiatives of the state government is provided in the subsequent chapter).

Enabling Institutions

3.5.8 Rajasthan is also one of the first states in the country to have set up an Infrastructure Project Development Company, called Project Development Corporation Limited (PDCOR Ltd.), with the prime objective of implementing infrastructure projects in Rajasthan on a commercial format. PDCOR has been floated as a joint venture between the private sector (HDFC Ltd. and IL&FS Ltd.) and the Government of Rajasthan. It takes up project development work - including identification of prima-facie commercially viable projects, preparation of detailed feasibility and investment banking reports, obtaining required Government approvals and identification of private parties which can own and execute these projects.

3.5.9 On the industrial investment front, The Bureau of Industrial Promotion (BIP) is the nodal agency that promotes setting up of industrial units in the State. BIP has also been made the single window for clearing all medium and large-scale industrial projects.

3.5.10 Rajasthan State Industrial Development and Investment Corporation (RIICO) is the nodal agency for development of industrial areas in the State. It also provides loans to private entrepreneurs for setting up industrial units in the State and for investing in infrastructure development. Rajasthan Financial Corporation (RFC) also supplements the efforts of RIICO by offering loans to the private sector.

Demonstration Projects

3.5.11 By creating an appropriate policy framework and with the assistance of the Enabling Institutions, the Government of Rajasthan has demonstrated success in terms of private participation in infrastructure development. Four road projects developed by the private sector are operating in the state on which toll is being collected successfully. Two more road projects are being developed by the private sector on BOT basis.

3.5.12 In the power sector, Power Purchase Agreements (PPAs) have been signed with private parties. Private sector has also shown keen interest in setting up power plants under the Captive Power Policy of the state. A number of social infrastructure projects have been taken up by the private sector in the numerous industrial areas of the state. These projects range from setting up of medical / engineering colleges to establishing Common Effluent Treatment Plants.

3.5.13 The State Government acknowledges the importance of industrial area development and development of tourism, as these sectors have a multiplier effect on the overall economic development of the state. These `Trigger Sectors’ also create development opportunities in terms of employment generation and development of social infrastructure.

3.5.14 The overall approach towards the development and upgradation of infrastructure is a combination of optimum utilization of the State's resources and involvement of the private sector. Specific measures are being taken to develop Sectoral Clusters taking into account the needs of the targeted industry.

CHAPTER 4 :

OVERVIEW OF EXISTING TOURISM SCENARIO IN RAJASTHAN

This chapter contains

- Background of tourism in Rajasthan
- Major tourist destinations in Rajasthan
- Tourist traffic in Rajasthan
- Major state government plans and incentives for tourism department
- RTDC activities

4.1 BACKGROUND OF TOURISM IN RAJASTHAN

4.1.1 Rajasthan has emerged as one of the popular tourist destinations in India for both domestic and foreign tourists. The number of tourist arrivals in the state has increased four fold in the last thirty years and in 2001, the state received 0.6 Mn foreign tourist and over 7 Mn domestic tourists.

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

4.1.3 Four decades ago tourism in Rajasthan was small industry that was largely confined to the elite foreign tourists and domestic pilgrim traffic. Tourist arrivals were restricted to a few thousand tourists annually and were primarily recorded in select places such as Jaipur, the state capital, Udaipur and Jodhpur (for foreign tourists) and the pilgrim centres of Ajmer, Pushkar and Nathdwara (for domestic tourists). The employment in the sector and the sector's contribution to the state economy, as well as employment potential were limited.

4.1.4 However, over the last few decades, due to the focussed efforts of Rajasthan Tourism, various State Government agencies, select entrepreneurs / individuals, tourism has grown from an elite and pilgrim phenomenon to a mass phenomenon putting Rajasthan firmly on the foreign and domestic tourist map. Also, as compared to the past, where the tourism in the state meant desert tourism, heritage tourism (forts, palaces, etc.) and pilgrim tourism, today the tourists have a wide canvas of places, attractions and activities to choose from in the state, which enhances the overall tourism experience.

4.1.5 The tourist arrivals in the state have shown a substantial increase in the past few decades. The total tourist arrivals in Rajasthan have grown at a CAGR of 5% from 3.39 to 7 Mn in 1985-86 to Mn in 2001-02. The number of foreign tourists has also increased at a CAGR of 5% from 0.27 Mn in 1985-86 to 0.6 Mn in 2001-02.

4.1.6 The industry today employs over one lakh people directly and over three lakh people indirectly. Its contribution to the State economy is estimated to be over Rs 2000 Cr. presently. Given the increasingly important role that the sector plays in the overall socio-economic development of the state, the State Government of Rajasthan has accorded an industry status to tourism from the year 1989.

4.1.7 As the nodal agency to promote tourism in the state, the Department of Tourism (DoT), Rajasthan has played a key role in this growth along with the DoT promoted Rajasthan Tourism Development Corporation (RTDC), which was established in November, 1978 primarily to act as catalyst by developing tourism infrastructure facilities (for domestic and foreign tourists), particularly by way of basic amenities like accommodation, catering and organised tours / sight seeing facilities.

4.1.8 Also, the prestigious ‘Palace on Wheels’ catering to the upmarket foreign tourist was started on 26th January, 1982 by RTDC in collaboration with Indian Railways and over 35,000 tourists in 554 trips have travelled since its inception upto April 2001.

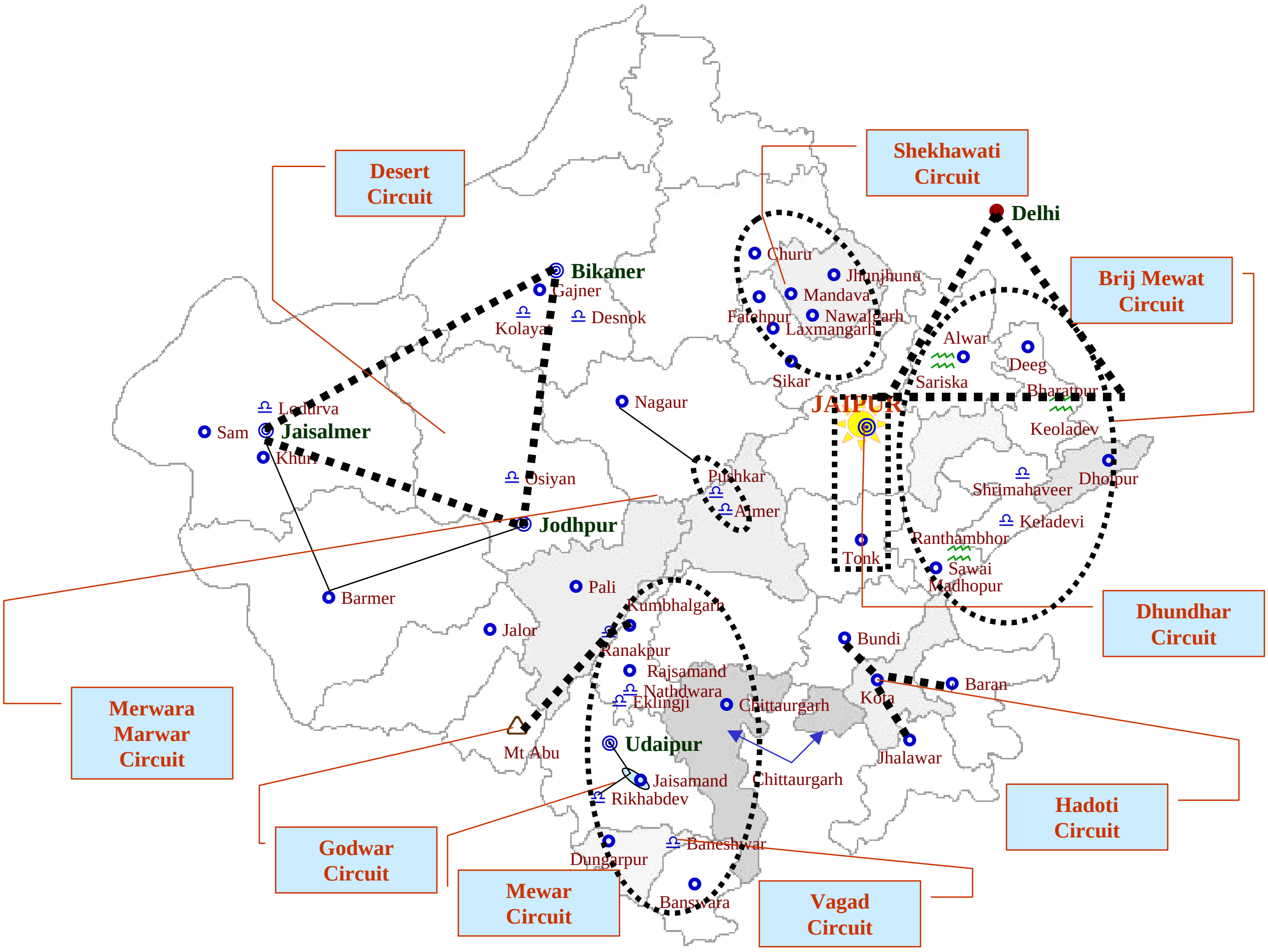
4.2 MAJOR TOURIST DESTINATIONS IN RAJASTHAN (CIRCUITS AND STANDALONE DESTINATIONS)

4.2.1 Exhibit 4.1 indicates the major tourist circuits and locations in Rajasthan. As seen, Tourism in Rajasthan extends almost through the entire state, though tourist activity is concentrated around six main cities, which serve as ‘tourist hubs’ for places of tourist attraction in and around these ‘hubs’. These tourist ‘hub’ cities are Jaipur, Jodhpur, Jaisalmer, Bikaner, Udaipur and Mount Abu. Almost every tourist (with the possible exception of pilgrim traffic) who visits Rajasthan would visit one or more of these ‘tourist hub’ locations as part of his / her tourist itinerary. Each of these hubs usually form part of a Tourist Circuit as follows :

- Jaipur is a part of the popular ‘Golden Triangle’ circuit (Delhi-Agra-Jaipur) that is very popular with the foreign tourists
- Jodhpur, Bikaner and Jaisalmer form the popular ‘Desert Circuit’ of Rajasthan
- Udaipur is the entry point into south Rajasthan and forms the hub for tourist activity in the Mewar and Vagad region of the state.
- Mount Abu, the only hill station in Rajasthan, is largely a standalone tourist destination for domestic tourists (especially from Gujarat but also Western India).

Exhibit 4.1

Tourism Map of Rajasthan – Major Tourist Circuits



Major Tourist Circuits

4.2.2 A unique feature of tourism in Rajasthan is the development of tourist circuits rather than standalone tourist destinations. As Exhibit 4.1 indicates there are nine tourist circuits as identified by Rajasthan DoT, based on their geography, attractions and coverage by independent / group tourists as follows :

- Desert Circuit
- Mewar Circuit
- Dhundhar Circuit
- Godwar Circuit
- Merwara-Marwar Circuit
- Brij-Mewat Circuit
- Shekhawati Circuit
- Hadoti Circuit and
- Vagad Circuit

4.2.3 Of these 9 circuits, the Jaipur (Dhundhar) Circuit, Desert Circuit and Mewar Circuit are well developed, whereas in other circuits, tourism is limited to cover of only 1-2 destinations rather than the circuit as a whole.

4.2.4 Exhibit 4.2 provides a snapshot of the various tourism circuits.

Exhibit 4.2

Major Tourist Circuits in Rajasthan

Circuit	Season	Main Tourist Locations	Largest Tourist Location (Tourist arrivals in 2001)	Main Attractions/ Tourism Experience	Other Places of Tourist Interest
Desert Circuit	Oct-Mar	Jodhpur, Jaisalmer, Bikaner	Jodhpur (4.5 lakh)	Sand dunes and desert experience Two unique forts Palaces and carved Havelis	Osiyan (near Jodhpur) Sam and Khuri dunes, Lodurva Jain temples (near Jaisalmer) Gajner Palace and WLS, Deshnok Karni Mata temple (near Bikaner) Barmer
Mewar Circuit	Sept-Mar	Udaipur Chittaurgarh Nathdwara* Kumbhalgarh	Udaipur (7.2 lakh)	Leisure, history and pilgrim Lakes, few forts and palaces Pilgrim centres	Jaisamand Lake, Jagat and Nagda temple ruins, Rana Pratap memorials (near Udaipur) Wild life sanctuary (near Kumbhalgarh)
Vagad Circuit	Sept-Mar	Dungarpur Banswara	Banswara (1.2 lakh)	Tribal culture, fairs and festivals, forts and palaces and nature	Baneshwar, Galiyakot (near Dungarpur) Mahi Dam, Arthuna (near Banswara)
Godwar Circuit	Feb-June Sept-Dec	Mount Abu* Ranakpur	Mount Abu (12.9 lakh)	Leisure: Mount Abu, the only hill station in Rajasthan Pilgrim: Ranakpur, one of the five holy Jain places Delwara temples, Nakki lake	Gaumukh temple, Arbuda temple (near Mount Abu)
Dhundhar Circuit	Sept-Mar	Jaipur*	Jaipur (8.3 lakh)	Forts, palaces, havelis, gardens Jantar Mantar Observatory	Samode Palace and gardens, Abhaneri step-well, Sambhar Lake, Ramgarh Lake (near Jaipur)
Brij Mewat Circuit	Oct-Feb	Bharatpur S Madhopur* Alwar Sariska*	Bharatpur (11.1 lakh)	Nature/ Wild life tourism Few forts, palaces and lakes	Siliserh Lake Palace (near Sariska and Alwar) Deeg (near Bharatpur)
Merwara-Marwar	Domestic– Throughout the year Foreign –	Ajmer* Pushkar	Ajmer (13.2 lakh)	Pilgrimage (Dargah Sharif and Pushkar Lake)	Lakes (in and around Ajmer) Kishangarh (on Ajmer-Jaipur route)

Circuit	Season	Main Tourist Locations	Largest Tourist Location (Tourist arrivals in 2001)	Main Attractions/ Tourism Experience	Other Places of Tourist Interest
	Nov				Roopangarh (near Kishangarh) Nagaur Fort, Merta City (Nagaur district)
Shekhawati Circuit	Sept-Mar	Sikar Jhunjhunu	Jhunjhunu (11.0 lakh)	Frescos and painted havelis	
Hadoti Circuit	Sept-Mar	Kota Bundi Jhalawar	Kota (6.4 lakh)	Natural beauty Few forts, palaces and temples	

Also popularly covered as standalone destinations

<u>Desert Circuit (Jodhpur-Jaisalmer-Bikaner)</u>

4.2.5 The Desert circuit includes the popular tourist locations of Jodhpur, Jaisalmer and Bikaner. Barmer and Nagaur are the other locations, which also increasingly form a part of the Desert circuit itinerary. An extended Desert circuit tour also includes other places such as Ajmer / Pushkar and Merta. The Desert circuit is popular with both foreign as well as domestic tourists.

4.2.6 The circuit is a part of the great Indian Thar Desert and is characterised by the sand dunes spread across the region. The climate is the hot and dry for most part of the year except for a short monsoon period. Hence, tourism is seasonal with the season extending from October to March.

<u>Mewar Circuit (Udaipur-Chittaurgarh-Nathdwara)</u>

4.2.7 The Mewar circuit offers a combination of religion and history. Udaipur is the tourist hub of this circuit, other key tourist locations in this circuit being Chittaurgarh, Nathdwara and Kumbhalgarh. Other places of tourist interest, though less frequented are Jaisamand Lake, Jagat, Rikhabdeo, Eklingji, Haldighati, etc. are relatively underdeveloped tourist areas adjoining the Mewar circuit.

4.2.8 Mewar region falls in the Aravalli range that encompasses lakes, beautiful hills and deep valleys. The climate in the region is pleasant for most part of the year except the summer months from April to June. The tourist activity is high during the months of September to March. The region being popular amongst domestic tourists, also receives tourists from the neighbouring states during vacation months in summer.

<u>Vagad Circuit (Dungarpur-Banswara)</u>

4.2.9 The Vagad circuit offers a combination of tribal culture and history. Although a separate circuit by itself, Udaipur (Mewar Circuit) is most often the hub for this circuit. Other key tourist locations in this circuit are Baneshwar, Deo Somnath, Arthuna, Galiyakot and Mahi Dam. This circuit is relatively unexplored due to its proximity to the popularity of the adjoining the Mewar circuit.

4.2.10 Vagad region comprises the southern tip of the Aravalli range and lies on the Rajasthan-Gujarat border. The region encompasses wild and rugged terrain in the northeast to alluvial soil in the southwest. The climate in the region is pleasant for most part of the year except the summer months from April to June. The tourist activity is high during the months of September to March, peaking during the Baneshwar Fair in February.

Dhundhar Circuit (Jaipur-Dausa-Tonk)

4.2.11 The Dhundhar circuit is spread around Jaipur and is known for its rich blend of culture, history, architecture and religion. Besides Jaipur, it includes tourist locations such as Samode, Abhaneri, Tonk and Ramgarh. These locations are usually covered by undertaking one-day excursion from Jaipur.

4.2.12 The Dhundhar circuit lies between the northern Aravalli range and close to the Sambhar Basin. The climate in the region is extremely hot during the peak summer months of April – June. As a result, the peak tourist season extends from September to March. Being the capital city and the main gateway into the state, Jaipur and the region also experiences some tourist arrivals during the vacation months.

4.2.13 The circuit is very popular with both foreign as well as domestic tourists. The main attraction of the Dhundhar circuit is the palaces, forts and museums in and around Jaipur. Apart from this, Jaipur is also a place for arts and handicrafts and numerous festivities.

Godwar Circuit (Mount Abu-Ranakpur)

4.2.14 The Godwar circuit has the only hill station in Rajasthan - Mount Abu. The beautiful temple town of Ranakpur is the other important attraction in the circuit. The former is very popular leisure destination with the tourist coming from Gujarat, whereas the latter is popular with both the domestic as well as foreign tourist. Another location in the circuit, which is relatively unexplored by the tourists, is the simple Rajasthani town of Jalore.

4.2.15 Although a part of the Aravalli range, Mount Abu is detached completely from it by a narrow valley and the highest point is situated at its northern end. The place also has the richest vegetation in Rajasthan. As the only hill station in the state Mount Abu is a popular summer retreat, and the tourist season extends from February to June and in the vacation period from September to December. Located nearby are the famous Delwara Jain Temples, which are renowned all over the world for their exquisite stone carvings.

Merwara-Marwar Circuit (Ajmer-Pushkar Circuit)

4.2.16 The Merwara-Marwar Circuit is the heart of pilgrim activity in Rajasthan. Ajmer and Pushkar are the important pilgrim centres for tourists from all over India. Pushkar is internationally known for its annual camel fair held in November with a large number of foreign tourists visiting the fair every year. Other locations in the circuit, Merta and Nagaur are relatively less popular.

4.2.17 The circuit falls in the Sambhar Plains. The tourist season is spread out evenly during the year although the tourist arrivals are very high during the annual Urs at Ajmer and the Pushkar Fair.

Brij Mewat Circuit (Alwar-Sariska-Bharatpur-Sawai Madhopur)

4.2.18 The Brij Mewat circuit is very popular with wildlife enthusiasts. The region also has a fair share of places of historic and archaeological importance. The circuit covers locations bordering Delhi, Uttar Pradesh and Madhya Pradesh and includes Alwar, Sariska, Deeg, Bharatpur, Karauli and Sawai Madhopur. Although termed as a circuit these tourist locations are covered as daily excursions from Jaipur or enroute Jaipur from either Delhi or Agra. Sawai Madhopur is also covered as a standalone circuit by the domestic to tourist.

4.2.19 The circuit is nestled between cluster of small hills of the Aravalli range. The southern and eastern part of the circuit bordering Uttar Pradesh, has large areas under wetlands, locally called as Orans. The tourist arrivals at these locations are the maximum during the winter months from October to February.

4.2.20 The main attractions in the Brij Mewat circuit are the National Parks at Sariska, Bharatpur and Ranthambhor. The circuit (especially Sariska and Bharatpur) is also popular as a weekend tourist destination for visitors coming from Delhi and the National Capital Region.

Shekhawati Circuit (Sikar-Mandawa-Jhunjhunu)

4.2.21 The Shekhawati region in Rajasthan is known for its fresco-painted havelis built by the former rich merchants of the region. The Shekhawati region is popularly called the 'open art gallery" of Rajasthan. This region includes numerous small towns like Mandawa, Nawalgarh, Sikar, Jhunjhunu, Fatehpur, Churu, Mukundgarh, Dundlod, Chirawa, etc. each having their share of such beautiful havelis.

4.2.22 The circuit attracts primarily the foreign tourists arriving into the state. The region also serves as the gateway for tourists arriving from Delhi and moving towards Bikaner in the Desert circuit. The tourist season extends from September to March.

Hadoti Circuit (Bundi-Kota-Jhalawar)

4.2.23 The Hadoti circuit is amongst the least explored regions of Rajasthan. This circuit includes the districts of Bundi, Kota and Jhalawar. Places of tourist interest in the adjoining Baran district are also covered as a part of this circuit.

4.2.24 The Hadoti region falls in the Harawati plains, which is interspersed with the Bundi hills and Kota plateau. The region has beautiful hills, valleys and lakes, which form a picturesque countryside. The tourist season in the region extends from September to March.

4.2.25 The main attractions in the Hadoti circuit are the palaces at Kota and Bundi. The Hadoti circuit also has several places of religious interest, especially for domestic tourists arriving from Madhya Pradesh. Jhalawar is also well known for its annual fair.

4.2.26 Although the nine circuits in Rajasthan cover the entire universe of attractions that the state has to offer their coverage by various independent tourists differ considerably. Similarly, group tourists cover these circuits in different ways. The most popular tours taken by various tourists are given in Exhibit 4.3. The nine identified circuits are covered in detail subsequently.

Exhibit 4.3

Popular Tours/ Circuits by Tourist Types

Circuit/ Destination	Popular Coverage Pattern	Popular among Tourist Category
Jaipur City	As standalone destination	Independent tourists
	As a part of the Golden Triangle	Group Tourists
	As an extension of other circuits being the state capital	Independent/ Group Tourists
Desert circuit (Jodhpur-Jaisalmer-Barmer-Bikaner)		Group Tourists (Mainly foreign)
Jodhpur –Jaisalmer: Popular leg	Also covered independently.	Group/ Independent (Foreign) Tourists
Bikaner-Barmer: Less popular	Barmer is at times not covered at all	Group Tourists
Mewar circuit (Udaipur-Chittaurgarh-Rajsamand)		Group Tourists
Udaipur City	As standalone destination	Group/ Independent (Domestic) Tourists

Circuit/ Destination	Popular Coverage Pattern	Popular among Tourist Category
Udaipur-Chittaurgarh	Also done independently As a part of the PoW	Group (Domestic)/ Independent (Domestic) Tourist Group (Foreign) Tourist
Udaipur-Nathdwara-Rajsamand Nathdwara	Day excursion from Udaipur Also covered standalone as pilgrim destination	Group/ Independent Domestic Tourist, particularly from Gujarat
Udaipur-Kumbhalgarh-Ranakpur	Day excursion from Udaipur	Group/ Independent Domestic Tourist
Vagad circuit (Dungarpur-Banswara)		
Dungarpur	Day excursion from Udaipur / Approached from Gujarat enroute Udaipur	Group/ Independent Domestic Tourist
Banswara	Day excursion from Udaipur / Approached from Ratlam (Madhya Pradesh)	Group/ Independent Domestic Tourist
Godwar circuit (Mount Abu-Ranakpur)	Popularly approached from Gujarat Also approached from Udaipur	Group/ Independent Domestic Tourist Group/ Independent Domestic Tourist
Brij-Mewat circuit (Alwar-Sariska-Deeg-Bharatpur-Dholpur-Karauli-Sawai Madhopur)		Group Tourist
Keoladeo NP, Bharatpur	Covered standalone or as an extension of the Golden Triangle	Group/ Independent (Foreign) Tourists
Sariska Palace and NP	Covered standalone	Group (Foreign)/ Independent (Domestic) Tourists
Ranthambhor NP	Covered standalone	Group (Foreign)/ Independent (Domestic) Tourists

Popularity of Tourist Destinations

4.2.27 The popularity of various locations within the circuits outlined above differs from one category of tourist to another. For example, Mount Abu and Nathdwara are popular amongst the domestic tourists mainly from Gujarat, whereas, Shekhawati and Jaisalmer are popular with the foreign tourist.

4.2.28 Exhibit 4.4 summarises the popularity levels as well as the tourism experience sought at the main tourist destinations in Rajasthan amongst various tourist categories.

Exhibit 4.4

Popularity of Main Tourist Destinations of Rajasthan

Destination	Nature of Tourism Activity	Popularity Amongst Tourists	
		Indian	Foreign
Jaipur	Capital City History, Heritage and Culture	**High**	**High** - Entry point into Rajasthan - Part of the Golden Triangle
Jodhpur	Heritage and Culture	**Medium** -Declining over the years	**High** - Part of the Desert Circuit

Destination	Nature of Tourism Activity	Popularity Amongst Tourists	
		Indian	**Foreign**
Jaisalmer	Desert Heritage and Culture	**Low**	**High** - Focal point of the Desert Triangle
Bikaner	Heritage and Culture	**High**	**Medium** - Entry point for Desert Circuit from Delhi via Shekhawati
Udaipur	Heritage and Culture, Leisure	**High** - Particularly from Gujarat	**High**
Chittaurgarh	History	**High**	**Low**
Nathdwara	Religion	**High**	**Low**
Mount Abu	Leisure	**High** - Popular hill station for Rajasthan and Gujarat	**Low**
Ajmer	Religion	**High**	**High** - Offshoot of the Pushkar Fair
Pushkar	Religion	**High**	**High** - Particularly, during the Pushkar Fair
Bharatpur	Nature	**Medium**	**High** - Bird Sanctuary
Alwar	Heritage and Culture	**Medium**	**Medium**
Shekhawati	Art	**Low**	**Medium** - Frescos - Entry point to Desert circuit
Jhunjunun	Heritage and Culture	**Low**	**Medium** - Entry point from Delhi
Jhalawar	Heritage and Culture	**High** - Event led (Fairs)	**Low**
Dungarpur	Heritage	**Low**	**Low**
Banswara	Tribal Culture	**Medium** -Event led (Fairs)	**Low**

4.3 TOURIST TRAFFIC IN RAJASTHAN

4.3.1 Rajasthan with its rich cultural, historical and environmental heritage, coupled with colourful fairs and festivals and friendly people has become a popular destination for tourists from all over the world as well as from India. Except for sea beaches and snow clad mountains, the state offers a wide canvas of tourism products–traditionally this has meant desert tourism, forts, palaces, lakes and sanctuaries but now also includes adventure tourism, rural tourism, aqua tourism, etc.

4.3.2 Rajasthan received around 0.61 Mn of the 2.62 Mn foreign tourists who visited India in 2001. Additionally, the state also recorded over 7.75 Mn domestic tourist in the same year. The popular Golden Triangle circuit (Delhi-Agra-Jaipur) has put Jaipur on the world tourism map with the city receiving the highest number of foreign tourists visiting the state.

4.3.3 Exhibit 4.5 gives the growth trends in tourist arrivals at various locations in Rajasthan during the last five years.

4.3.4 Rajasthan receives tourists from all over India, though there are larger number of arrivals from a few states such as Gujarat, Punjab-Haryana, Uttar Pradesh, Madhya Pradesh and West Bengal. Although, traditionally domestic tourism was primarily for religion and history/ heritage, the domestic tourist today is increasingly seeking different experiences. Jaipur, Jodhpur and Udaipur also receive corporate tourists.

4.3.5 The foreign tourists received by the state are primarily from European countries, particularly UK, France and Germany. A large number of tourists also come from Asian countries, particularly from Japan.

4.3.6 The profile of foreign tourists has also undergone a change in the past few years. Today the tourist is increasingly seeking ‘interactive’ tourism experiences. Products such as safaris, rural tourism, sports tourism, etc. are gaining increasingly popularity.

Exhibit 4.5

Tourist Arrival Growth Trends

Circuit	Location	Tourists	1997	1998	1999	2000	2001	Comments
Desert Circuit	Jodhpur	Indian	427549	364870	352707	370933	383479	Most popular location in the Desert circuit for both foreign and domestic tourists
		Foreign	49221	49007	47807	67845	69812	
		Total	476770	413877	400514	438778	453291	
	Jaisalmer	Indian	69184	52889	35157	58578	103319	Being the 'core' of the Desert circuit, popular with domestic and foreign tourists
		Foreign	57166	52299	50283	50732	46914	
		Total	126350	105188	85440	109310	150233	
	Bikaner	Indian	196168	205976	225678	182477	185645	Popular for its forts and religious places, notable amongst them being Deshnok Karni Mata Temple
		Foreign	25479	26752	22215	28441	31441	
		Total	221647	232728	247893	210918	217086	
Mewar Circuit	Udaipur	Indian	638987	575088	578622	735333	662826	Increasingly popular with domestic tourists. Now has marginally higher domestic traffic than Jaipur
		Foreign	84284	78267	78708	77174	56760	Popular with foreign tourists for Lakes, Palaces and Havelis
		Total	723271	653355	657330	812507	719586	
	Nathdwara	Indian	281161	326749	464136	462837	319159	Essentially a pilgrim town - only domestic pilgrim traffic
		Foreign		37	166	300	562	
		Total	281161	326786	464302	463137	319721	
	Chittaurgarh	Indian	240872	327874	150108	120145	120390	Gets significant traffic from both Western Madhya Pradesh, West Bengal and Rajasthan
		Foreign	13357	10453	5886	8164	7552	
		Total	254229	338327	155994	128309	127942	
	Rikhabdeo	Indian	8754	10629	16021	36893	8200	Religious tourists from Gujarat
		Foreign	25	28	52	22	60	
		Total	8779	10657	16073	36915	8260	
Vagad Circuit	Banswara	Indian	76200	96137	111872	109053	115101	Famous for its Baneshwar Fair
		Foreign	256	306	338	263	273	

Circuit	Location	Tourists	1997	1998	1999	2000	2001	Comments
		Total	76456	96443	112210	109316	115374	
Jaipur / Dhundhar Circuit	Jaipur	Indian	700358	616315	613511	745476	655715	
		Foreign	184112	150971	129955	154756	172950	Highest foreign tourist arrivals in the state. Gets significant Golden Triangle traffic
		Total	884470	767286	743466	900232	828665	
Mount Abu - Ranakpur (Godwar Circuit)	Mount Abu	Indian	1391832	1056113	1338431	1254770	1282940	Highest domestic tourist arrivals in the State (excluding fair / festivals locations)
		Foreign	15818	14259	13413	14427	13752	Popular for the Delwara Jain Temples
		Total	1407650	1070372	1351844	1269197	1296692	
	Ranakpur	Indian	55320	55756	55520	56949	61535	Jain pilgrim centre
		Foreign	301	23976	21676	23816	24144	Known for the exquisitely carved Jain Temples
		Total	55621	79732	77196	80765	85679	
Ajmer-Pushkar (Merwara-Marwar Circuit)	Ajmer	Indian	493596	783782	766497	1088000	1269309	Domestic traffic concentrated at the annual Urs festival at Ajmer Dargah
		Foreign	60066	48808	45202	51344	54040	
		Total	553662	832590	811699	1139344	1323349	
	Pushkar	Indian	700515	679303	731124	951000	865000	Traffic highly concentrated during the annual Pushkar festival
		Foreign	50198	38150	49279	52011	46182	Foreign traffic concentrated during the Pushkar camel Fair
		Total	750713	717453	780403	1003011	911182	
Brij-Mewat Circuit	Bharatpur	Indian	118310	112394	104247	118079	101181	Bharatpur Bird Sanctuary in the Keoladeo National Park is the main tourist attraction. Keoladeo National Park is also a world heritage site
		Foreign	16265	14638	10626	11262	9553	
		Total	134575	127032	114873	129341	110734	
	S. Madhopur	Indian	77238	84961	62080	89391	50598	Ranthambhor National Park the main tourist attraction
		Foreign	4704	8602	6750	8869	10064	
		Total	81942	93563	68830	98260	60662	

Circuit	Location	Tourists	1997	1998	1999	2000	2001	Comments
	Alwar	Indian	50747	47360	53958	76934	100995	
		Foreign	1837	12465	7934	8235	3334	
		Total	52584	59825	61892	85169	104329	
	Sariska	Indian	5864	10706	11949	15559	11817	Gaining popularity with Delhi tourists as a weekend gateway
		Foreign	1280	8325	9551	10854	12351	Sariska Wild Life Sanctuary the major attraction
		Total	7144	19031	21500	26413	24168	
	Siliserh	Indian	1780	3956	1981	2036	1843	Gaining popularity as weekend destination
		Foreign	394	404	254	206	120	
		Total	2174	4360	2235	2242	1963	
	Behror	Indian	10004	8189	6417	5754	3799	Enroute to/ from Delhi/ Jaipur
		Foreign	80	84	49	66	36	
		Total	10084	8273	6466	5820	3835	
Shekhawati Circuit	Jhunjunun	Indian	63085	66205	61027	68192	76446	Main tourist location in Shekhawati region that is covered by both domestic and foreign tourists for their fresco havelis
		Foreign	26641	30233	25346	28818	33751	
		Total	89726	96438	86373	97010	110197	
	Sikar	Indian	14912	7952	5952	8136	6382	
		Foreign	803	574	337	527	295	
		Total	15715	8526	6289	8663	6677	
Hadoti Circuit	Kota	Indian	102162	83212	53017	53874	62438	Underdeveloped circuit. Not on the foreign tourist map. Also, not on the national tourism map - current domestic tourist traffic largely from North / Central India
		Foreign	2156	1834	1523	1775	1991	
		Total	104318	85046	54540	55649	64429	
	Bundi	Indian	2661	11333	29293	30433	20911	Popular for its magnificent forts and beautiful palaces
		Foreign	1431	3818	10342	10568	4334	
		Total	4092	15151	39635	41001	25245	
	Jhalawar	Indian	183812	124615	128703	189694	174262	Primarily during the Jhalawar fair. The place is also famous for its Sun

Circuit	Location	Tourists	1997	1998	1999	2000	2001	Comments
								Temple
		Foreign	95	47	41	82	72	
		Total	183907	124662	128744	189776	174334	
Others		Indian	379044	690946	717520	543865	1113927	
		Foreign	9091	17032	24952	12543	7940	
		Total	388135	707978	742472	556408	1121867	
Grand Total		Indian	6290115	6403310	6675528	7374391	7757217	
		Foreign	605060	591369	562685	623100	608283	
		Total	6895175	6994679	7238213	7997491	8365500	

4.3.7 Exhibit 4.6 provides details on the tourist stay patterns for foreign and domestic tourists at major locations in the state for each of the tourist circuits. Generally, the foreign either as part of the Golden Triangle circuit or as a Rajasthan only itinerary. The domestic tourist on the other hand, usually prefers to visit selective locations rather than a comprehensive 'all Rajasthan' tours.

Exhibit 4.6

Tourist Stay Patterns

Circuit	Domestic Tourist		Foreign Tourist	
	Location	ALOS	Location	ALOS
Desert Circuit	Jodhpur	1	Jodhpur	1.5
	Jaisalmer	1.5	Jaisalmer	2
	Bikaner	1	Bikaner	1
Mewar Circuit	Udaipur (Standalone)	2	Udaipur (Circuit)	2.5
	Udaipur (Circuit)	3		
	Nathdwara (Standalone)	1		
Vagad Circuit	Dungarpur	1	Dungarpur	1
	Banswara	1		
Godwar Circuit	Mount Abu	2	Mount Abu	1
	Ranakpur (Standalone)	1		
Hadoti Circuit	Kota	2	Kota	1
Dhundhar Circuit	Jaipur (Standalone)	3	Jaipur (Standalone)	2
	Jaipur (Circuit)	2	Jaipur (Golden Triangle)	1.5
	Samode (Weekend Getaway)	2	Samode	1
Brij Mewat Circuit	Sariska (Weekend Getaway)	1.5	Sariska	2
	Sawai Madhopur	1	Sawai Madhopur	2
Merwara-Marwar Circuit	Ajmer	1	Pushkar	2
	Pushkar	1		
Shekhawati Circuit	Mandawa / Nawalgarh / Dundlod	1	Mandawa / Nawalgarh / Dundlod	1

ALOS – Average Length of Stay in terms of bed nights spent. Figures are illustrative in nature

Tourist Traffic Trends

4.3.8 The main tourist traffic trends in Rajasthan over the past 5 years are as follows:

- **Slow Growth in tourism in the main tourist locations** : The main tourist cities of Rajasthan namely, Jaipur, Udaipur, Jodhpur, Jaisalmer, Bikaner and Mount Abu have seen marginal growth (and occasionally a marginal decline) in total tourist traffic and all these locations (barring a few exceptions) have seen tourist traffic levels in 2001 largely unchanged from 5 years ago (1997)

- **Select Tourist locations are experiencing high growth** : In particular, the Ajmer-Pushkar circuit is experiencing high growth in domestic tourists – whilst foreign tourist traffic at these locations is more or less static, domestic tourist traffic has increased significantly particularly at Ajmer

  Also, the Alwar-Sariska belt is experiencing strong growth. Growth in domestic tourism is largely due to its increasing popularity as a weekend gateway from Delhi (as well as a 'conference tourism' venue) while growth in foreign tourist traffic is led by the growing popularity of the Sariska WLS amongst foreigners who visits Jaipur and / or cover the Golden Triangle circuit

Amongst the smaller tourist destinations, Bundi is particularly (part of the Hadoti circuit) has seen a multi-fold increase in both domestic and foreign traffic

Banswara (also Dungarpur) is slowly emerging on the tourist map though it should be noted that taking Banswara as an example traffic is led by the annual religious festivals / fairs

- **The tourism experience sought from Rajasthan is changing** : Traditionally the Rajasthan tourism experience offered palaces, forts, lakes and the desert. However, based on the 5-year trend in tourist traffic, the experience sought from Rajasthan is changing. The traditional tourism experience is no doubt desired but the focus is gradually shifting to more varied tourism products particularly:
  - Eco-tourism / wild life tourism (particularly the Sanctuaries)
  - Weekend tourism / conference tourism (particularly in Northern Rajasthan given its proximity to Delhi and NCR)
  - Value-added desert tourism (including adventure tourism, desert safaris, desert sports, etc.)
  - Newer (less 'touristry') destinations offering the same traditional experience (e.g. Bundi, distant heritage hotels, etc.)
- **Domestic tourists are gradually becoming more important than foreign tourists**: more so since in the last few years (and particularly in 2001) foreign tourists have been static while domestic tourists have grown.

4.3.9 Tourism activity in Rajasthan has shown a direct correlation with the socio-political stability in the country and the state. Political uncertainty, social unrest and such events have affected the tourist activity adversely in the past. Although, the foreign tourist numbers have remained stable over the years, they have failed to achieve their growth potential.

4.3.10 Thus, tourism has come to play a significant role in Rajasthan's economy. Although the sector has huge potential to contribute significantly towards the state's overall socio-economic development, the same has yet to be fully realised. Recognizing this, the State Government, has formulated a comprehensive Tourism Policy and taken up several initiatives to harness the untapped potential of tourism.

4.4 MAJOR STATE GOVERNMENT PLANS AND INCENTIVES FOR TOURISM

4.4.1 Rajasthan Government has accorded tourism an industry status in the year 1989. The state government has also announced a comprehensive tourism policy in the year 2001 and has made tourism a focus sector in the State Budget for the year 2002-03.

Tourism Policy of Rajasthan-2001

4.4.2 The stated objectives of the new Tourism Policy, 2001 are as follows :

- Development of the tourism industry to increase employment opportunities, especially in the rural areas for unemployed youth
- Optimum utilisation of rich tourist resources of the State in order to attract the maximum number of domestic and international tourists
- To facilitate the growth of tourism in the state and to further involve the private sector in the development of tourism in Rajasthan

- Preservation of the rich, natural, historical, architectural and cultural heritage of Rajasthan with special emphasis on conservation of historical monuments in Rajasthan
- To develop a ready market for the rich and varied handicrafts and cottage industries of Rajasthan so as to ensure welfare of artisans/ artists
- To promote inter cultural understanding through religious/ pilgrim tourism and fairs and festivals
- To promote socio-economic development of Rajasthan through tourism with special thrust on backward areas
- To make tourism a `people's industry' in the state
- To minimise the negative impact of tourism and promote sustainable tourism
- To diversify the tourism product

4.4.3 It is envisaged that the State Government will play the role of a catalyst towards tourism development in the state. It will be primarily involved in tourism promotion and the provision of a policy and regulatory framework and where relevant, enabling infrastructure–the private sector would be encouraged to invest in direct tourism related infrastructure in the state.

Strategy Intent Emerging from Rajasthan's Tourism Policy

- **Tourism as 'Growth Engine'**: Tourism has been identified as a 'growth engine' to promote socio-economic development of the state.
- **Conserving and Augmenting the 'Core'**: The state will seek to conserve and augment what constitutes the 'core' of its tourism offering, namely, heritage and culture that is expressed through legends, buildings, events, art, music and dance
- **Diversifying the 'Product Offering'**: The state recognises the changing market place and increasing competitive pressures within the country and outside the country and hence, will seek to diversify its tourism offering by adding new products to its tourism portfolio
- **Participative and Responsible Tourism**: Tourism will be made more participative by increasingly involving local communities in developing and maintaining their tourism assets, and would increase responsibility of the industry towards the society by seeking to create new employment opportunities, creating environment controls and conserving environment, promoting local culture, ensuring tourist well-being and increasing tourist responsibility towards the host community
- **Creating a 'Green Channel' for Tourism Investment**: The state will seek and encourage increasing private participation in tourism development and assume a strong catalytic role

State Government/ DoT Rajasthan Initiatives for Development of Tourism Industry

4.4.4 Recognising the role of the private sector in the development of the tourism industry, the State Government has announced several initiatives and incentives to encourage and facilitate private sector participation. Some of these are outlined below:

- **Acquisition of land for tourism development**: A Land Bank has been set up by DoT through its nodal agency, RTDC, to make available land belonging to various government departments (PWD, Forest and Revenue), local municipalities, corporations, UITs to the private investor for setting up tourism units.

- **Identification of Nazool Properties for establishment of tourism units**: These are properties which are not protected by State Department of Archaeology and Museums (A&M) or Archaeological Survey of India (ASI) and which are owned by the State Government. Such properties would be transferred to DoT for developing into heritage hotels / museums / tourist complexes / tourist resorts in collaboration with private entrepreneurs under Disposal of Land and Properties by DoT/ RTDC Rules, 1997.

- **Simplification of rules and regulations for allotment and conversion of land for tourism infrastructure**: DoT, in consultation with the revenue and local self government departments is in the process of amending the relevant rules for conversion and allotment of land for setting up of tourism units in rural and urban areas.

- **Identification of direct tourism infrastructure and tourism products for private sector investment**: DoT has identified tourism infrastructure projects like air services, accommodation facilities, road links, etc. and unique tourism products such as amusement parks, water parks, ropeways, theme parks, tourist resorts, Haveli on Wheels, Palace on Waves, Rural tourism, etc. for private sector investment.

- The state has also promulgated special **Ropeway Act and Ropeway Rules** for facilitating the establishment of ropeways in the state.

- **Identification of Special tourist areas for preservation of special characters of these areas**: DoT is initiating special efforts to preserve the unique identity of tourist destinations that have assumed heritage importance like Jaisalmer, Pushkar, Nathdwara, Mount Abu, etc. Accordingly, local authorities have been asked to pass special laws to ensure preservation of special character of these tourist towns.

- **Preservation of historical and cultural heritage**: DoT is encouraging private initiative in preservation or monuments (forts, palaces, etc.) **by offering these monuments for adoption**. Efforts are being made to co-ordinate preservation, conservation and upkeep of the old buildings with all departments including ASI, A & M, Devasthan, Waqf Board, UIT’s, municipalities, corporations, etc.

- **Dissemination of Information:** Rajasthan tourism has also launched its own website that currently offers all the information on the state tourism to the tourists. It endeavors to broad base this website and offer online assistance to private investors on investment opportunities in the state

State Government Incentives to Tourism Units[1]

4.4.5 To supplement its initiatives, the State Government has also extended various incentives for tourism industry in Rajasthan:

[1] Tourism Units include Boarding/ Lodging units, Safari Parks, Holiday Resorts, Amusement Parks, Camping Sites, Ropeways and Motels

- Remission in stamp duty to the extent of 50% on transfer of deeds relating to land purchased in Municipal areas and to the extent of 100% relating to land purchased in Panchayat area
- Remission in Land and Building tax to the extent of 100% for hotels for the first five years if the hotel falls in a Municipal area
- Remission in Luxury tax to the extent of 50% for five years in Municipal areas and to the extent of 100% for five years in Panchayat areas
- Concession in Bar License fees for heritage hotels
- Increase in Luxury Tax slabs from Rs. 750 to Rs. 1000 and 50% rebate in Luxury Tax during off-season (April- July)
- Interest subsidy of 2% for tourism units on capital investment of Rs. 60 lakhs and above with a condition that at least 50% of the unskilled workforce will be employed from local people
- DG sets subsidy at 25% of purchased value subject to maximum of Rs. 2.5 lakhs for tourism units established in rural areas
- Entertainment tax exemption for films to the extent of 100% for a period of one year from the date of release if 75% of the film is picturised in Rajasthan
- Entertainment tax exemption to the extent 75% in first year, 50% in second year and 25% in third year for new Multiplexes and Drive-in Cinemas
- Allotment of Government land upto four bigas in rural areas at 25% of the reserved price of agricultural land subject to the condition that 100% unskilled workforce is employed from the local area

Central Government Loans and Schemes

4.4.6 Apart from the above state incentives, tourism units in the state can also avail of various incentives and concessions offered by the Central Government from time to time. Some of the major incentives being currently offered by the Central Government are as follows:

- Loan facility- the Tourism Finance Corporation of India (TFCI) provides financial assistance to the private sector for construction of hotels as well as other tourist facilities with an investment of Rs. 3 Cr. and above
- Interest subsidy- A 3% interest subsidy is available to hotels of one to three star categories on loans sanctioned by financial institutions. 5% interest subsidy is available on loans if tourism units are constructed in Jaisalmer, Jodhpur and Barmer
- Income Tax Incentives- (a) 50% of profit derived by hotels, travel agents and tour operators in foreign exchange are exempt from income tax. The balance 50% of profits in foreign exchange is also exempt provided it is reinvested within a period of five years in new hotel projects or expansion of existing units.
- Income Tax Incentive- (b) Hotels located in hilly areas, rural areas, places of pilgrimage or places notified as important for tourism development will be eligible for 50% deductions from their profits/ gains. In respect of hotels located in other places the deduction allowed is 30% except Mumbai, Delhi, Chennai and Kolkata

4.4.7 In its efforts to advance tourism in the state, the DoT has assigned RTDC the task of facilitating development of direct tourism infrastructure. The following section gives a brief introduction to the role and activities of RTDC in Rajasthan Tourism.

4.5 RTDC AS THE 'CATALYST'

4.5.1 After its establishment in 1979, RTDC took over the ownership and management of all the hotels, motels, resthouses that were, till then, under the Department of Tourism, Rajasthan. At present it operates 61 units which includes 36 hotels, 15 motels, 7 cafetarias, and 3 independent units. A total of 2102 bed capacity is available with RTDC, in four categories of hotels, namely Elite, Classic, Standard and Economy. Besides these, RTDC also provides temporary 'tented' accommodation at various tourist places, particularly during the fairs and festivals.

4.5.2 RTDC runs 42 Tourist Reception Centres (TRCs) and Tourist Information Bureaus (TIBs) at 21 places in the state and 5 outside the state (at New Delhi, Mumbai, Kolkata, Ahmedabad and Chennai).

4.5.3 RTDC provides transport facilities for the tourist visiting Rajasthan. It provides daily sight seeing and guided tour facility through luxury buses at important 'tourist hubs' like Jaipur, Jodhpur, Chittaurgarh, Jaisalmer, Sariska, Mount Abu and Udaipur. For this, RTDC has a fleet of 12 buses, 6 taxis and an imported car.

4.5.4 RTDC operates package tours from Delhi during the months of September to April every year. The package tours include transport in deluxe coach and car, accommodation in deluxe RTDC properties and sightseeing. It also has a special economy school package for children (school students).

4.5.5 RTDC operates the prestigious Palace on Wheels (PoW) train in association with the Indian Railways. This train, which has 14 deluxe saloons with elegant interiors and modern amenities journeys through Delhi, Jaipur, Jaisalmer, Jodhpur, Sawai Madhopur, Chittaurgarh, Udaipur, Agra and Bharatpur in the tour of 7 days. Annually, around 2700 tourists use the PoW for touring around in the state.

4.5.6 RTDC organises the famous Pushkar Fair with an objective to promote cultural heritage and festivals. A tented village is setup by RTDC comprising of more than 500 tents and dormitories to provide accommodation and catering facilities for the tourists.

4.5.7 RTDC provides boating facilities at Siliserh (Alwar), Ramgarh (Jaipur), Amber (Jaipur), Kailana (Jodhpur), Udaipur, Gajner (Bikaner) and Bundi. The boats are either cruiser motorboats or paddleboats.

4.5.8 As a diversified activity, RTDC is a license holder of wholesale beer from June 1987 and also runs 59 Beer shops in the state. Variety of Indian Made Foreign Liquor (IMFL) and beer is provided at 22 units of RTDC.

<u>Future Plans of RTDC</u>

4.5.9 RTDC's plans for further development of tourism infrastructure and promotion includes the following:

- RTDC would takeover the old castles / forts from the Government and allot them for development as a heritage properties and hotels, under the Land Bank scheme. The focus is primarily on promotion of tourism in the lesser-known circuits
- RTDC has already licensed 17 of its units (which include hotels, wayside facilities, motels, cafeterias, etc.) for private parties to operate. RTDC has identified 21 more

properties that would be licensed to private parties. Of these 21 properties 12 would be licensed with the staff and the remaining without the staff.

- RTDC has signed Memorandum of Understanding (MoU) for joint promotion and marketing of tourism with Maharashtra, West Bengal, Karnataka, Himachal Pradesh, Orissa, Uttaranchal and Pondicherry. Similar MoUs are planned with Indian and International airlines
- RTDC plans to enter into collaboration with other State Tourism Corporations and private tour operators to have Inter-state package tour arrangements (recently a MoU has been signed with Gujarat State Tourism Development Corporation)
- RTDC would collaborate with the State Department of Civil Aviation and District Collectors for making use of the air strips and helipads at different locations in the state to encourage private Air Taxi Operators (ATOs)

4.5.10 With its institutional setup and policy initiatives, Rajasthan Tourism has the right foundation to build a sustainable tourism industry in the state. There is now a strong need to co-ordinate and orchestrate efforts of various stakeholders to realise the mission of making Tourism in Rajasthan a truly People's Industry.

CHAPTER 5 :

EXISTING DIRECT TOURISM INFRASTRUCTURE AND MAJOR TOURISM PLANS AND SCHEMES

This chapter contains an overview of the tourism relevant infrastructure in Rajasthan and includes the following :

- Transport Infrastructure including Air, Rail, Road
- Accommodation
- Tourist Offices and Information Centres
- Midways and Wayside Facilities
- Sanctuaries and Monuments: Existing Status and Infrastructure
- Other Tourist relevant facilities/ services
- Tourism related Support infrastructure
- Future thrust areas for Tourism infrastructure development
- SWOT of Rajasthan tourism

5.1 INTRODUCTION

5.1.1 Success of tourism in Rajasthan hinges critically upon the adequacy and quality of tourism related infrastructure (and the tourist facilities and services) that are available to the tourist. Tourism relevant infrastructure specifically includes the following:

- Transport and Connectivity Infrastructure (by Air/ Rail/ Road both in terms of transport terminals, connectivity and transport services)
- Direct Tourism Infrastructure in terms of :
  - a) Accommodation (Private/ Government)
  - b) Tourist Offices and Information Centres
  - c) Midway and Wayside Facilities
  - d) Others (Shopping facilities, Restaurants, etc.)
- Sanctuaries and Monuments

5.2 TRANSPORT INFRASTRUCTURE IN RAJASTHAN

5.2.1 Tourism related transport infrastructure and facilities can be categorised as follows:

- Transport infrastructure
  - Road network
  - Rail network
  - Terminals (airports, bus and railways stations)
- Travel facilities
  - Road travel (buses, taxis, auto-rickshaws)
  - Rail services
  - Flight services

5.2.2 Rajasthan has a well-developed infrastructure for tourism in terms of travel links to major circuit ‘hubs’ from different parts of the country. Jaipur, Udaipur, Jodhpur and Mount Abu form the important gateways to the state, with well-established road and rail networks connecting these places to the rest of the tourist locations in the state (also air, excluding Mount Abu).

Existing Road Transport Infrastructure

Road network

5.2.3 The state has a well-developed network of roads that facilitate access to the main tourist hubs from within and outside the state and ease movement within the circuits. Hubs such as Jaipur, Jodhpur and Udaipur are connected to other tourist places in the state through a well-developed network of roads. The road connectivity in the state is depicted in the Exhibit 5.1

Road Travel Facilities

5.2.4 Road travel facilities in the state include buses, tourist taxis and rickshaws. These are provided by both, private operators and the state transport undertakings. A large number of buses, tempos and taxis are owned by private tour operators.

5.2.5 It is estimated that around 12,000 buses, 4,000 tempos, 11,500 taxis and 16,000 rickshaws are presently operational in the state. Tourist taxis are mostly employed for intra-city travel and local excursions to various tourist sites. Buses and passenger tempos are used for inter-city transport, whereas, rickshaws are used for local travel.

Rajasthan State Road Transport Corporation (RSRTC)

5.2.6 RSRTC, a state undertaking, is the provider of public transport facilities in the state. It operates close to 4,500 buses (including 200 privately owned buses) and transports over 1 Mn passengers from its 46 depots spread across the state.

5.2.7 RSRTC operates over 13,000 bus services all over Rajasthan and to the adjoining states of Gujarat, Haryana, Punjab, Delhi, Uttar Pradesh, Himachal Pradesh, Madhya Pradesh and Maharashtra. Apart from the inter-city transport, RSRTC also runs city buses in

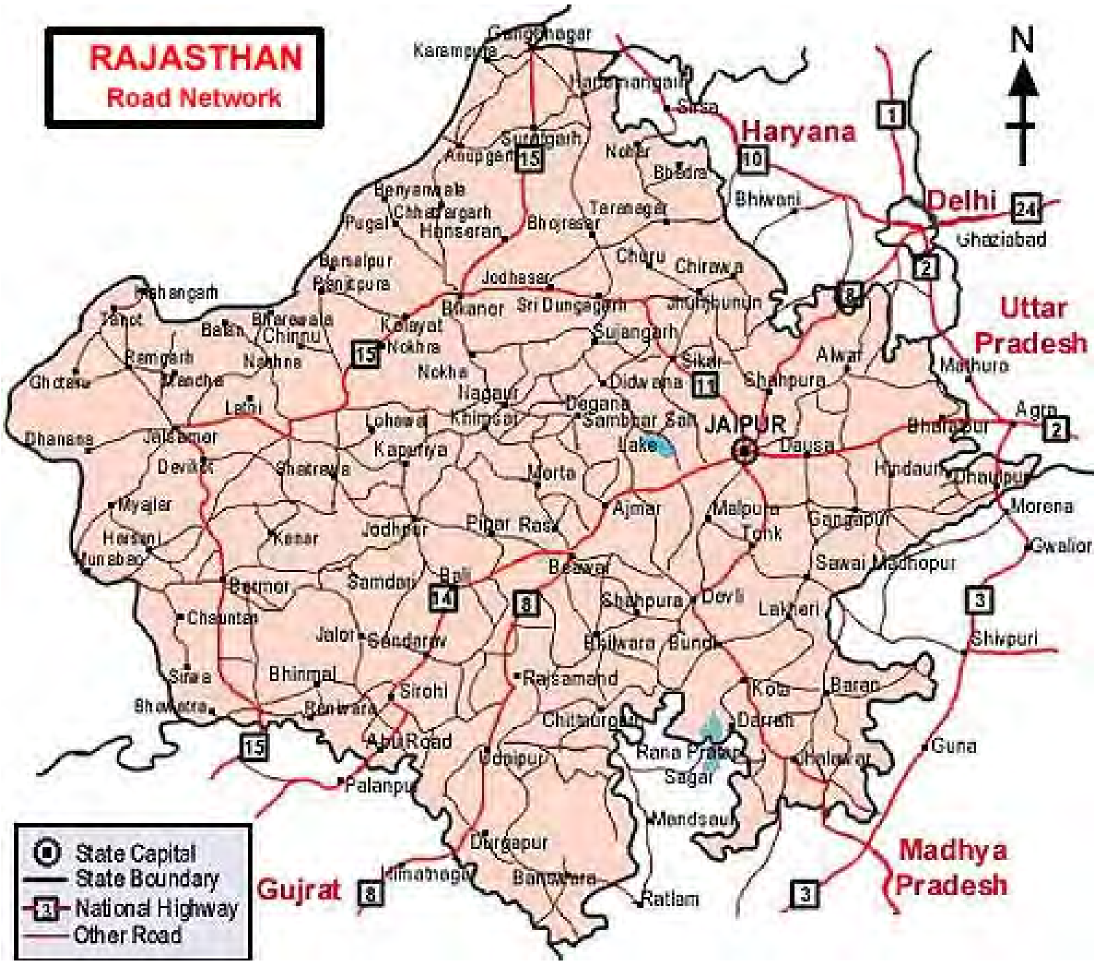
Jaipur. RSRTC's bus services within the state and to the neighbouring states are categorised into five types based on the type of buses;

- Ordinary service
- Express service
- Semi-deluxe service
- Deluxe service (popularly known as Silver Line)
- Air conditioned service

These primarily cater to the tourist traffic

<u>Exhibit 5.1</u>

<u>Road Connectivity in Rajasthan</u>



<u>Railways</u>

5.2.8 The rail network in Rajasthan mainly falls under the Western and Northern Railway zones. A small section of track also falls under the Central Railway zone. The total length of railway routes in the state is around 5,920 Kms. Out of the total length, 3,028 Kms is covered under broad gauge, 2,803 Kms under meter gauge and 89 Kms under narrow gauge and a small stretch of 491 Kms on the Western Railway (between Gangdhar and Bharatpur) is electrified.

5.2.9 Jodhpur, Jaipur, Ajmer, Bikaner, Kota, Sawai Madhopur, Chittaurgarh, Merta Road and Bharatpur are the major rail junctions in Rajasthan with broad gauge connectivity with the rest of the country. Udaipur is also an important railway terminal though at present it is on the metre gauge network.

5.2.10 The rail connectivity map of Rajasthan is provided in Exhibit 5.2 while Exhibit 5.3 provides rail connectivity details of the main tourist locations in the state.

Exhibit 5.2

Railway Connectivity Map of Rajasthan

Exhibit 5.3

Rail Connectivity of Major Tourist Locations in Rajasthan

Name of the Place	Nearest Significant Railhead		Type of Rail Line
	Place	Distance (km.)	
Mount Abu	Abu Road	21	BG
Udaipur	Udaipur	--	MG (Conversion to BG)
Jaipur	Jaipur	--	BG, MG
Pushkar	Ajmer	13	BG
Jodhpur	Jodhpur	--	BG, MG
Ajmer	Ajmer	--	BG
Jaisalmer	Jaisalmer	--	BG
Nathdwara	Udaipur	48	MG (Conversion to BG)
Chittaurgarh	Chittaurgarh	--	BG
Bharatpur	Bharatpur	--	BG (Electrified)
Bikaner	Bikaner	--	BG, MG

Name of the Place	Nearest Significant Railhead		
Ranakpur	Abu Road	95	BG
Kota	Kota	--	BG, BG (Electrified)
Sawai Madhopur	Sawai Madhopur	--	BG, BG (Electrified)
Jhunjhunun	Jhunjhunun	--	MG
Banswara	Dungarpur Udaipur	110 163	MG MG (Conversion to BG)
Alwar	Alwar	--	BG
Sariska	Alwar	37	BG
Rishabdeo	Udaipur	58	MG (Conversion to BG)
Bundi	Kota	46	BG, BG (Electrified)
Sikar	Sikar	--	MG
Siliserh	Alwar	13	BG
Jaisamand	Udaipur	48	MG (Conversion to BG)
Behror	Rewari	52	BG
Jhalawar	Jhalawar Road Kota	28 62	BG, BG (Electrified) BG, BG (Electrified)
Osiyan	Osiyan	--	BG
Barmer	Barmer	--	MG (Conversion to BG)
Nagaur	Nagaur	--	BG

BG – Broad Gauge, MG – Meter Gauge

5.2.11 As seen, major circuit hubs and standalone tourist locations in Rajasthan are well connected by rail network. Jaipur, Ajmer, Jodhpur and Mount Abu are the important gateways for domestic tourists travelling on rail. These locations have regular train services to and from important cities in the country and in the state.

5.2.12 The Mewar region currently only has a metre gauge network with the exception of Chittaurgarh which is also connected on the broad gauge network. Udaipur, which is the main tourist hub of Mewar has no broad guage connectivity with other tourist locations in and outside Rajasthan. Broad gauging of Chittaurgarh–Udaipur link is proposed which is expected to improve the connectivity of Udaipur with the main Mumbai-Delhi trunk line. The proposed broad gauging of the Ahmedabad–Udaipur link would bring Udaipur on the important Ahmedabad–Delhi and Mumbai-Ahmedabad-Udaipur network. Exhibit 5.4 provides a list of major trains running between tourist destinations in Rajasthan and important cities in the country.

Exhibit 5.4

Major Trains Connecting Tourist Destinations in Rajasthan to Other Cities in India

Trains arriving into	**Name of the Train**	**Number**	**Frequency**
JAIPUR			
Delhi	Delhi-Sarai Rohilla Porbandar Express	9264	Th, Mo
	Delhi-Jodhpur Express	4859	Daily
	Delhi-Ahmedabad Mail	9106	Daily
	Delhi-Jaipur Express	2413	Daily
	Bareilly-Gandhidham Ala-hazrat Express	4311	We, Su
	Dehradun-Okha Uttaranchal Express	9266	Su
	Delhi-Ahmedabad Ashram Express	2916	Daily
	Delhi-Jodhpur Mandore Express	2461	Daily
	New -Delhi Ajmer Shatabdi Express	2015	Except Su

Trains arriving into	Name of the Train	Number	Frequency
	New Delhi-Ahmedabad Swarna Jayanti Rajdhani Express	2958	Tu, Th, Sa
	Delhi-Sarai Rohilla-Udaipur Chetak Express	9615	Daily
	Delhi-Sarai Rohilla-Jaipur Shekhawati Express	9733	Daily
Mumbai	Bandra-Jaipur Aravali Express	9707	Daily
	Mumbai-Jaipur Express	2955	Daily
Kolkata	Howrah-Jodhpur Bikaner Express	2307/2307A	Daily
	Sealdah Ajmer Ananya Express	2315	Fr
Chennai	Jaipur-Chennai/ Bangalore Express	9768/9776	Tu, Fr, Su
Bangalore	Jaipur-Bangalore Express	9776	Th,Sa
JODHPUR			
Delhi	Delhi-Jodhpur Express	4859	Daily
	Delhi-Jodhpur Mandore Express	2461	Daily
Mumbai	Bandra-Bikaner Ranakpur Express	4708	Daily
Kolkata	Howrah-Jodhpur Bikaner Express	2307	Daily
Bangalore	Bangalore Jodhpur Express	6508	Su
UDAIPUR			
Delhi	Delhi-Sarai Rohilla-Ahmedabad Express	9943	Daily
	Delhi-Sarai Rohilla-Udaipur Chetak Express	9615	Daily
BIKANER			
Delhi	Delhi-Sarai Rohilla Bikaner Express	4789	Daily
	Delhi-Sarai Rohilla Bikaner Mail	4791	Daily
	Delhi-Sarai Rohilla Bikaner Link Express	4709	Daily
Mumbai	Bandra-Bikaner Ranakpur Express	4708	Daily
Kolkata	Bikaner Howrah Link Express	2307A	Daily
AJMER			
Delhi	Delhi-Sarai Rohilla Porbandar Express	9264	Th, Mo
	Delhi-Ahmedabad Mail	9106	Daily
	Bareilly-Gandhidham Ala-hazrat Express	4311	We, Su
	Dehradun-Okha Uttaranchal Express	9266	Su
	Delhi-Ahmedabad Ashram Express	2916	Daily
	New -Delhi Ajmer Shatabdi Express	2015	Except Su
	New Delhi-Ahmedabad Swarna Jayanti Rajdhani Express	2958	Tu, Th, Sa
	Delhi-Sarai Rohilla-Ahmedabad Express	9943	Daily
	Delhi-Sarai Rohilla-Udaipur Chetak Express	9615	Daily
Mumbai	Bandra-Jaipur Aravali Express	9707	Daily
Kolkata	Sealdah-Ajmer Ananya Express	2315	Fr
Bangalore	Ajmer-Bangalore Express	6509	Fr

5.2.13 As seen from the Exhibit, there are regular services linking various important tourist locations in Rajasthan with other cities in the country. Besides these, there are regular train services between important tourist locations within the state. For example, there are regular daily services between Jaipur-Bikaner, Jaipur-Jodhpur-Jaisalmer, Jaipur-Udaipur, Jaipur-Kota, Ajmer-Udaipur, Jaipur-Bikaner, etc.

Air Links

5.2.14 Although Rajasthan has 19 airstrips and 128 helipads, regular commercial air services are operational only at Jaipur, Jodhpur and Udaipur. Kota and Jaisalmer do not have regular commercial flight services inspite of having adequate landing and take off facilities. Flights to Jaisalmer have been discontinued recently given its sensitive location bordering Pakistan.

5.2.15 Airports at Jaipur and Udaipur are managed by the Airports Authority of India (AAI) whereas the airstrips at Jodhpur and Jaisalmer are under the control of Indian Air Force (IAF).

5.2.16 Air services connect the state only to Mumbai and Delhi. Indian Airlines, Jet Airways and Alliance Air operate regular flights to Udaipur, Jodhpur and Jaipur, ex-Mumbai/Delhi. The details of the air services to Rajasthan are shown in Exhibit 5.5

Exhibit 5.5

Air Services to Rajasthan

Sector	Airline	Frequency	Aircraft	Stops	Flt. No.	ETD	ETA
JAIPUR							
Jaipur-Ahmedabad	Alliance Air	Mo/We/Fr	737	Direct	CD7269	1810	1910
Jaipur-Delhi	Indian Airlines	Daily	320	Direct	IC895	0830	0910
	Jet Airways	Daily Daily	AT7 737	Direct Direct	9W3301 9W722	0945 1800	1045 1840
	Alliance Air	Daily	737	Direct	CD7472	2030	2110
Jaipur-Jodhpur	Alliance Air	Daily	737	Direct	CD7471	0700	0740
Jaipur-Kolkata	Alliance Air	Mo/We/Fr Tu/Th/Sa	737 737	Via Ahmedabad Direct	CD7269 CD7267	1810 1950	2155 2155
Jaipur-Mumbai	Alliance Air	Daily	737	Via Jodhpur and Udaipur	CD7471	0700	1030
	Jet Airways	Daily Daily	AT7 737	Via Udaipur Direct	9W3401 9W372	0735 1930	1105 2105
	Indian Airlines	Daily	320	Direct	IC612	2030	2205
JODHPUR							
Jodhpur-Delhi	Jet Airways	Daily	AT7	Direct	9W3316	0855	1015
	Alliance Air	Daily	737	Via Jaipur	CD7472	1920	2110
Jodhpur-Jaipur	Alliance Air	Daily	737	Direct	CD7472	1920	2000
Jodhpur-Mumbai	Alliance Air	Daily	737	Via Udaipur	CD7471	0810	1030
	Jet Airways	Daily	AT7	Direct	9W3408	1255	1500
Jodhpur-Udaipur	Alliance Air	Daily	737	Direct	CD7471	0810	0850
UDAIPUR							
Udaipur-Delhi	Alliance Air	Daily	737	Via Jodhpur and Jaipur	CD7472	1810	2110
	Jet Airways	Daily Daily	AT7 AT7	Via Jaipur Direct	9W3301 9W3312	0810 1305	1045 1445
	Jet Airways	Daily	AT7	Direct	9W3301	0810	0915

Sector	Airline	Frequency	Aircraft	Stops	Flt. No.	ETD	ETA
Udaipur-Jaipur	Alliance Air	Daily	737	Via Jodhpur	CD7472	1810	2000
Udaipur-Jodhpur	Alliance Air	Daily	737	Direct	CD7472	1810	1850
Udaipur-Mumbai	Jet Airways	Daily Daily except Sat	AT7 AT7	Direct Direct	9W3401 9W3406	0920 1925	1105 2110
	Alliance Air	Daily	737	Direct	CD7471	0920	1030

Exhibit 5.6

Rajasthan Air Passenger Traffic

	1996-97	1997-98	1998-99	1999-00
Passengers Handled				
Jaipur	221700	228153	232322	267027
Udaipur	147800	136195	125751	158888
Jodhpur	44300	50391	N.A.	N.A.
	413800	**414739**	**358073**	**425915**
Aircrafts Handled				
Jaipur	6382	6154	5878	6448
Udaipur	2086	2112	2007	3793
Jodhpur	711	810	N.A.	N.A.
	9179	**9076**	**7885**	**10241**

Source: Airport Authority of India

5.2.17 The details of air traffic at the three commercial airports in Rajasthan are given in Exhibit 5.6. As seen, a total of 10241 flights operated from the three airports, and a cumulative of 4.3 lakh passengers were handled in the year 1999-00.

5.2.18 The Jaipur airport is being upgraded to an International airport. The airport upgradation project is being implemented by AAI with a strong catalytic role being played by RTDC especially in the funding of the project (from HUDCO and OECF, Japan) Already Indian Airlines has initiated a once-a-week flight service from Jaipur to Dubai (via Delhi) from February 2002.

5.2.19 With an objective of improving the air connectivity of Ajmer with rest of the country, AAI has recently commissioned a feasibility study for construction of a domestic airport at Ajmer.

Tour Operators

5.2.20 Large number of private tour operators provide travel related services, such as transport vehicles (tourist coaches and taxis), hotel reservations, local sightseeing, air and rail bookings, airport and railway pickups, guide services (foreign language guides), etc. It is estimated that, Rajasthan has over 200 tour operators.

5.2.21 Tour operators in the state are hierarchically arranged as:

- ❑ National tour operators (Thomas Cook, SOTC, SITA, TCI, Cox & Kings, etc.)

- Regional tour operators (RTS, Dhola Maru Travels, Aravali Tours, etc.)
- Local tour operators

5.2.22 National and regional tour operators usually provide complete tour planning for in-bound tourists. Regional tour operators have annual contracts with their international counterparts, which are usually obtained through a bid process. Local tour operators organise tours for domestic group travelers and arrange for travel (tourist taxis) for excursions within the circuit.

5.2.23 Apart from this regional tour operators from other states plan operate tours in co-ordination with the regional / local tour operators in Rajasthan. RTDC also organises daily sightseeing tours from Jaipur, Jodhpur, Udaipur, Sawai Madhopur, Sariska and Jaisalmer.

5.3 ACCOMODATION

5.3.1 There are a wide variety of tourist accommodations available in the state ranging from deluxe five star palace hotels to dharmashalas/ dormitories at pilgrim locations.

5.3.2 The accommodation available in the state can be categorised as follows:

- Hotels (including Heritage Hotels)
- Government Accommodation (including RTDC/ITDC Accommodation, circuit houses, PWD and Forest Dept. Accommodation. etc.)
- Paying guest accommodation
- Tents
- Dharamshalas / dormitories

Hotels (including Heritage hotels)

5.3.3 Rajasthan offers the tourist a vast range of accommodation options to suit his budget as well as his preferences. It is estimated that the total number of hotels in the State is around 1,450 with a bed capacity of approx. 55,000-60,000. More than 75% of these hotels are located in the major tourist hubs such as Jaipur (~300 hotels), Udaipur (~130 hotels), Mount Abu (~130 hotels), Jodhpur (~90 hotels), Ajmer (~70 hotels), Jaisalmer (~50 hotels), etc.

5.3.4 The hotels in Rajasthan are largely managed by the private sector primarily by local entrepreneurs or local/ regional hotels/ groups. Domestic and international hotel chains are also present in the state and offer accommodation primarily in the luxury category. Domestic hotel chains like The Taj Group (Indian Hotels Co. Ltd.), The Oberoi Group (East India Hotels Ltd.), WelcomHeritage Hotels (ITC Hotels), HRH Group who own/ manage several star hotels in the state. Similarly, international chains like Holiday Inn, Accor, Radisson, Quality Inn also have a presence in the state through franchisee arrangements.

5.3.5 Rajasthan has been a pioneer state in launching heritage hotels in the country by converting old palaces and havelis of erstwhile rulers into tourist accommodations. These heritage hotels have become extremely popular with tourists, especially the foreign tourists. At present there are 43 DoT recognised heritage hotels in Rajasthan with a room capacity of 2330 rooms. Apart from these, there are 53 other heritage hotels (with an approx. capacity of 1800 rooms) that are not recognised by the DoT. A list of Heritage hotels in the state is given in Appendix 5.

5.3.6 The luxury range of hotels (4 Star, 5 Star, 5 Star Deluxe, Heritage and Resorts) constitute approx. 9% of the total number of hotels in the state. Mid-range hotels (2-star/3-star) constitute 14% and the remaining 73% are accounted by the budget range of hotels. The illustrative room tariffs across these hotel categories are as follows :

Exhibit 5.7

Details of Room Tariff Range (Rs. Per Night)

Category	Season (Rs./Room)	Off Season (Rs./Room)
Star & Luxury (5/4 star)	3000-4500	2000-2500
Mid-range (2/3 star)	1800-2500	1200-1800
Budget range	400-800	300-500
Heritage Hotels (except national chains)	1800-2500	1000-1500

5.3.7 It should be noted that the Budget range of hotels include a large population of uncategorised hotels/non-DoT recognised hotels. However, these hotels are present even in smaller places in the state and are popular with the average domestic tourist and also increasingly with the average foreign tourist. Over the years, there has been a shift in the profile of the foreign tourists arriving in Rajasthan, with an increasing number of young foreign tourists travelling to the state, who are not willing to spend on the luxury/ heritage experience, but demand clean and comfortable accommodation at an affordable price. Thus, there exists a gap in terms of good quality economy hotels in the state, given the more younger and less wealthier profile of the foreign tourist. This gap is accentuated particularly during the peak season.

Government Hotel Accommodation (RTDC, RSHCL and ITDC)

5.3.8 RTDC today owns/ manages 61 properties consisting of 36 hotels and 15 motels. The details of these units are provided in Exhibit 5.8. In its initiative to privatise its assets, RTDC has leased out some of its properties to private houses.

Exhibit 5.8

Details of RTDC Properties

Category	No. of Units
Hotels	36
Motels	15
Cafeterias	7
Others	3

5.3.9 A total of 2102 bed capacity is available with RTDC across its four categories of hotels, namely, Elite, Classic, Standard and Economy. Within these, RTDC offers suites, AC rooms, cool rooms, huts, ordinary rooms and dormitories to the tourists. Accommodation at RTDC hotels is available at reasonable tariffs (ranging from Rs. 50 for dormitories at Economy hotels to Rs. 1900 for suites at Elite Hotels). The main/flagship RTDC properties in the state are Hotel Gangaur (126 beds), Hotel Swagatam (100 beds) and Hotel Teej (109 beds) in Jaipur, Hotel Moomal (130 beds) in Jaisalmer, Hotel Ghoomar (156 beds) in Jodhpur, Hotel Shikhar (164 beds) in Mt. Abu, Hotel Kajri (141 beds) in Udaipur

5.3.10 In line with the policy of the State Government to increasingly involve private sector in the development of tourism infrastructure, RTDC accommodation properties have been leased out to private parties. By the end of 2000, around 17 RTDC units were licensed out (without staff) to private parties for two years and another 21 units were proposed to be licensed out (with/ without staff).

5.3.11 Another Government of Rajasthan undertaking, Rajasthan State Hotel Corporation Ltd. (RSHCL) also owns and manages two hotels in the state. These hotels are located at Jaipur (36 rooms) and Udaipur (25 rooms).

5.3.12 Indian Tourism Development Corporation (ITDC) manages 3 hotel properties in Rajasthan, one each at Jaipur (99 rooms), Udaipur (54 rooms) and Bharatpur (18 rooms). The combined bed capacity of these hotels is 342 beds.

5.3.13 Besides these, there are Circuit Houses, PWD and Electricity Board Dak Bungalows in Sikar, Churu, Jhunjhunu, Khetri and Pilani. Permission for accommodation can be obtained from local authorities. These alternatives offer accommodation at reasonable rates.

Paying Guest Accommodation

5.3.14 A major part of the tourism experience for a tourist is experiencing local life at a particular place. Recognising this, the Rajasthan Government, as part of its tourism activities, has pioneered a Paying Guest Scheme, wherein the tourists can stay as paying guests in a family atmosphere. This scheme is presently in operation in 12 cities in Rajasthan (Ajmer, Alwar, Bharatpur, Bikaner, Bundi, Chittaurgarh, Jaipur, Jaisalmer, Jodhpur, Kota, Mount Abu and Udaipur) and the estimated number facilities across the state is approx. 450 units with a total capacity of approx. 2700 beds.

5.3.15 The tariffs at these paying guest accommodations range from Rs. 50 to Rs. 500 per day. Care is taken to ensure that only such houses and families are identified and registered with the DoT who will offer adequate and suitable facility to the tourist.

5.3.16 Although the Paying Guest scheme was launched in 1991, this scheme has been only moderately successful. The reasons for the same apparently being the waning interest of families in offering such facilities due to loss of personal space. Moreover, the hosts are also expected to maintain certain standards to be eligible for this scheme. This has also been discouraging more families to offer these services.

Tents

5.3.17 Temporary tented accommodations are also available particularly during specific events such as fairs and festivals, when there is a large influx of tourists. Presently such tented accommodation is available in Pushkar, Jaisalmer and Nagaur during their fairs and festivals and is very popular with all the tourists.

5.3.18 Tents are provided by RTDC as well as other hotel chains like the Taj, Oberoi and WelcomHeritage. For example, during the annual Pushkar Festival, RTDC sets up a temporary tourist village consisting of huts (32), Swiss tents (150), standard tents (50) and dormitories (25). The village also has a coffee shop and a dining hall, which can cater to 1500 guests at a time. In addition to this, private hotels also put up over 500 tents during the same period.

5.3.19 Apart from the temporary accommodation during the fairs and festivals, permanent accommodation in form of tents is also provided by various star hotels at smaller tourist locations – here the focus is on providing the tourist with a tent/ camp-site experience. For example, Royal Camp at Nagaur Fort by WelcomHeritage Group (20 Swiss tents), Choki Dhani at Jaipur (31 village huts and 34 executive huts), Samode Bagh (50 Swiss tents), The Desert Resort (60 huts), etc.

5.3.20 Tented accommodation is also provided by organisers of various safaris in the state. On an average these safaris consist of a minimum of 15 tents for 2 nights.

Dharamshalas/ Dormitories

5.3.21 Several religious trusts across the state run dharamshalas/ dormitories that provide basic accommodation largely to the pilgrim tourists. Such accommodations supplement regular accommodation at pilgrim places like Ranakpur, Nathdwara, Ajmer, Pushkar, etc. and also at other cities such as Jaipur, Udaipur, Jodhpur, etc.

5.3.22 The estimated bed capacity of these dharamshalas would be close to 8,000 by and large in dormitory style accommodation This capacity is however flexible and can be stretched to accommodate a large mass of pilgrims arriving during various fairs and festivals.

Summary of Existing Accommodation Infrastructure

5.3.23 Based on the total accommodation facilities and the capacity available at these places, the overall accommodation scenario in Rajasthan is summarised as provided in Exhibit 5.9

Exhibit 5.9

Summary of Accommodation Available in Rajasthan

Category of accommodation	No. of units	Capacity (no. of beds)
Hotels/Govt. Accommodation (excl. RTDC/ITDC/RHSL)	1450	58,000
Paying guest facility	450	2,700
Tents (Temporary only)	750	2,100
Dharamshalas / Dormitories	--	8,000
Total	**2850**	**70,800**

Source: AFF Estimates

5.3.24 Overall occupancy levels across different categories of hotels in the state was around 60% in the past few years. However, in the recent years (particularly in 2001) the average occupancy levels have dropped to as low as 35-40%.

5.3.25 The peak time occupancy levels in main tourist cities in the state such as Jaipur, Jodhpur, Jaisalmer, Bikaner and Udaipur rise to 90-100%. There is a shortage of rooms particularly in the mid-range hotels in all the above places during the peak season.

5.3.26 Similarly, the peak time occupancy levels in Mount Abu, Ajmer and Pushkar are 90-100%. Shortage of rooms is experienced in all category of hotels during season time in Mount Abu and during festival time in Ajmer and Pushkar. Occupancy in all hotels is stretched by accommodating more people in each room.

5.3.27 In smaller cities too, the peak occupancy levels are high (80-90%) and shortage is experienced in luxury/ mid-range categories.

5.4 TOURIST OFFICES AND INFORMATION CENTRES

5.4.1 Another critical tourist infrastructure is tourist information centres in a place. These centres are designed to help the tourist get the best tourism experience in any location.

5.4.2 DoT, Rajasthan operates Tourist Reception Centres (TRCs) and Tourist Information Bureaus (TIBs) at various places across the state. The primary aim of these offices is to provide the arriving tourist with essential information related to accommodation, travel and sight seeing, shopping and events.

5.4.3 Presently, there are 11 TRCs and 29 TIBs at different tourist locations in the state. Also, there are two regional tourist offices in Jodhpur and Udaipur and smaller TRCs in Delhi, Kolkata, Mumbai, Ahmedabad and Chennai. Apart from offering tourist information, the TRCs also provide services such as arranging for bookings at RTDC and other private hotels in Rajasthan, information on other details like package tours, fairs and festivals, paying guest accommodation, etc.

5.4.4 A list of these offices is provided in Exhibit 5.10

Exhibit 5.10

Existing Tourist Offices : TRCs / TIBs in Rajasthan

Sr. No	District	TRC / TIB
1	Jaipur	TRC, Government Hostel, M.I. Road, Jaipur TIB, Railway Station, Jaipur TIB, Sindhi Camp, Jaipur TIB, Sanganer Airport, Jaipur TIB, Amer, Jaipur
2	Jodhpur	Regional Tourist Office, Jodhpur TRC, Jodhpur TIB, Jodhpur TIB, Airport, Jodhpur
3	Jaisalmer	TRC, Jaisalmer TIB, Jaisalmer TIB, Railway Station, Jaisalmer
4	Udaipur	Regional Tourist Office, Udaipur TRC, Udaipur TIB, Udaipur TIB, Railway Station, Udaipur TIB, Dabok Airport, Udaipur
5	Chittaurgarh	TRC, Chittaurgarh TIB, Chittaurgarh
6	Kota	TRC, Kota TIB, Kota
7	Bundi	TIB, Bundi
8	Sawai Madhopur	TRC, Sawai Madhopur TIB, Railway Station, Sawai Madhopur
9	Ajmer	TIB, Hotel Khadim, Ajmer TIB, Railway Station, Ajmer TIB, Pushkar
10	Bharatpur	TRC, Hotel Saras, Bharatpur TIB, Bharatpur

Sr. No	District	TRC / TIB
11	Alwar	TIB, Alwar
12	Jhunjhunu	TRC, Jhunjhunu TIB, Jhunjhunu
13	Bikaner	TRC, Hotel Dhola Maru, Bikaner TIB, Junagadh, Bikaner
14	Mount Abu	TIB, Mount Abu
15	Jhalawar	TIB, Jhalawar
16	Banswara	TIB, Banswara
17	Nathdwara	TIB, Nathdwara
18	Sikar	TIB, Sikar
19	Barmer	TIB, Barmer
20	Dungarpur	TIB, Dungarpur
21	Nagaur	TIB, Nagaur
Outside Rajasthan		
1	New Delhi	Rajasthan TRC
2	Kolkata	Rajasthan TRC
3	Mumbai	Rajasthan TRC
4	Chennai	Rajasthan TRC
5	Ahmedabad	Rajasthan TRC

Source: DoT, Rajasthan

5.4.5 Besides these Tourist offices, there are also travel/tourist information desks run by local tour operators at most of the larger hotels. These desks offer travel-related assistance in terms of local sightseeing information, taxi services, travel reservations, etc. to the tourist.

5.4.6 Although efforts are being made to have TRCs/ TIBs at maximum number of cities and important tourist locations in the state, the TRCs/ TIBs in the state need upgradation in terms of their infrastructure, professional training of staff and extent and quality of information offered.

5.5 MIDWAYS AND WAYSIDE FACILITIES

5.5.1 Rajasthan has a huge geographical area spanning more than 800 Kms from East to West and North to South. Since the air network and rail connectivity is limited in terms of its reach to smaller locations, there is a greater use of road for intercity travel as well as day-trips/ excursions from the major tourist destinations. This necessitates creation of suitable midway/ wayside infrastructure to provide enroute/ wayside amenities at appropriate places so that traveling tourists can relax and refresh.

5.5.2 Most roads connecting major tourist circuits and locations within each circuit have a number of small restaurants, dhabas, etc. catering to the refreshment requirement of the traveler. However most of these facilities are owned and managed by local entrepreneurs and therefore lack standardisation in hygiene and service. Also, at many places such facilities are not equipped to service large groups that may come in during the peak season and may lack in both quality and hygiene.

5.5.3 To overcome these deficiencies, RTDC has provided mid-ways at various places on the popular tourist routes. Presently, there are 21 such RTDC midways/ wayside facilities. Besides these, there are also private midway facilities offered on most busy tourist routes.

5.5.4 RTDC midways usually provide the traveler with amenities like a restaurant, communication facility, parking, washrooms and occasionally also with accommodation facilities. A list of current RTDC midway / wayside facilities that exist along various relevant tourist routes in Rajasthan are given in Exhibit 5.11.

Exhibit 5.11

Midway Facilities by RTDC in Rajasthan

Place	District	Type/ Management	Route Catered to
Kishangarh	Ajmer	Midway	Jaipur-Ajmer (NH8)
Talbriksh Behror	Alwar	Wayside Facility Midway-Motel	 Jaipur-Delhi (NH8)
Deeg	Bharatpur	Midway-Motel	Bharatpur-Deeg
Gulabpura Meenal	Bhilwara	Midway Wayside Facility	Bhilwara-Ajmer
Ratangarh	Churu	Midway	Bikaner-Agra Highway (NH11)
Mahuwa	Dausa	Midway	Bikaner-Jaipur-Agra Highway (NH11)
Dholpur	Dholpur	RTDC-Midway	Bombay-Agra Highway (NH3)
Shahpura Dudu	Jaipur	Midway Midway	Jaipur-Behror-Delhi (NH8) and Jaipur-Alwar Jaipur-Ajmer (NH8)
Gadisar Pokaran	Jaisalmer	Wayside Facility RTDC Midway	Jaisalmer – Bikaner (NH15) Jaisalmer-Jodhpur (State Highway) Jaisalmer-Jodhpur, Jaisalmer-Bikaner (NH15)
Bap Osiyan Phalodi Dechu	Jodhpur	Wayside Facility RTDC Midway Wayside Facility Wayside Facility	Jaisalmer-Bikaner Road (NH15) Jodhpur-Osiyan Road Jodhpur-Jaisalmer Road Jaisalmer-Bikaner Road (NH15) Jodhpur-Jaisalmer via Sekhala (State Highway)
Merta	Nagaur	Wayside Facility	Junction between Ajmer, Pali and Nagaur
Bar	Pali	RTDC-Midway	Ajmer-Jodhpur Road (Between Beawar and Raipur on State Highway)
Deogarh	Rajsamand	Midway	Jaipur-Ajmer-Udaipur Road (NH8)
Sikar	Sikar	Wayside Facility	Jaipur-Bikaner (NH-11)
Pindwara	Sirohi	Wayside Facility	Mount Abu-Udaipur Road (NH14)

Source: DoT, Rajasthan

5.5.5 Although there is a vast network of wayside facilities across the state, there are insufficient wayside facilities on some important routes. For example, on the Udaipur-Chittaurgarh-Kota and Udaipur-Jagat-Jaisamand-Chawand-Rishabdeo routes in South Rajasthan, on the Osiyan-Phalodi and Phalodi-Bikaner routes in the Desert region, on the Bikaner-Shekhawati route, etc.

5.5.6 Although the facilities available are by and large adequate in numbers, they lack in quality that an international traveler is used to and expects. Moreover, there are insufficient signages indicating the availability of such wayside facility on most routes. This creates a lot of inconvenience to Free Independent travellers, who have to depend on their drivers to get to a wayside facility.

5.6 SANCTUARIES AND MONUMENTS : EXISTING STATUS AND INFRASTRUCTURE

5.6.1 Rajasthan has one of the most varied of landscapes and natural attractions the country has to offer to the tourist. On one side, it has the arid Great Indian Thar Desert while on the other, it has one of the oldest mountain ranges in the world - the Aravalis. It also has over 25 sanctuaries/ parks, which can offer a different tourism experience. The following sections give an overview of the states and infrastructure at the various sanctuaries/ parks in the state.

Sanctuaries/ Parks

5.6.2 The forests of Rajasthan cover an approx. 9.3% of the total geographical area of the state. These forests are spread unequally in northern, southern, eastern and southeastern parts of the state. Rajasthan has 4 National Parks and 25 Wildlife Sanctuaries identified by the State Forest Department. The total area of National parks / Sanctuaries is 9,161.21 sq. km., which is roughly 2.8% of the geographic area of the state or 30.2% of the forest areas in the state.

5.6.3 The details of the major wild life sanctuaries in the state are given in Exhibit 5.12.

5.6.4 Although the state has over 25 sanctuaries/ parks, only the National Parks at Bharatpur, Ranthambhor and Sariska are amongst the popular tourist attractions in the state. The total tourist arrival at these places in 1999 was close to 2.2 lakh tourists, which includes a large number of foreign tourists. Other protected areas in the state are relatively less popular with only around 32,000 tourist arrivals cumulatively. Development and promotion of these sanctuaries on a selective basis thus offers Rajasthan the opportunity to enhance the its tourism experience in the state.

Exhibit 5.12

Wild Life Sanctuaries in Rajasthan: Existing status

Sr. No.	Protected Area	Area (sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access	Comments
	National Parks					
1	Keoladeo National Park	29	• About 390 species of monsoon breeder, resident and migratory birds. • Siberian cranes, otters, civet, hedgehog, fishing cat, jackal, etc.	At Bharatpur • RTDC/ITDC hotels • Forest Resthouse • Private hotels	• On NH11, 55 Kms from Agra and 190 Kms from Jaipur	• Falls on the "Golden Triangle" circuit • World Heritage site
2	Ranthambhor National Park	392	• Tiger, leopard, sloth bear, crocodile, civet, chinkara, birds of prey, etc.	At Ranthambhor • RTDC hotel • Forest Resthouse • Private hotels	• Jaipur–180 Kms • Tonk–90 Kms • Kota–125 Kms	• Usually covered standalone. • Visited for tiger
3	Sariska National Park	548	• Tiger, panther, neelgai,, hyena, sambhar, etc.	At Sariska • RTDC Hotel • Sariska Palace	• Alwar–37 Kms	• Close proximity to Delhi (170 Kms)
4	Desert National Park	3162	• Sand dunes, chinkara, desert cats and foxes	At Jaisalmer • RTDC hotel • Private hotels • Tents / Huts at Sam and Khuri	• Jaisalmer–40 Kms	• Popular for desert safaris
	Sanctuaries					
1	Sawai Mansingh W.L. Sanctuary	128	• Sloth bear, wild boar, caracal, chital, chinkara, hyena, etc.	At Sawai Madhopur • RTDC hotel • Private hotels	• Jaipur–180 Kms • Tonk–90 Kms • Kota–125 Kms • Karauli–25 Kms • Jaipur–144 Kms	
2	Keladevi W.L. Sanctuary	676	• Tiger, panther, sambhar, sloth bear, cheetal, porcupine, etc.	At Jaipur • RTDC/ITDC hotel		

Sr. No.	Protected Area	Area (sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access	Comments
				• Private hotels At Sawai Madhopur • RTDC hotel • Private hotels		
3	Kumbhalgarh W.L. Sanctuary	609	• Panther, jungle cat, hyena • Also Ranakpur temples and Kumbhalgarh Fort	• Forest Resthouse, Kumbhalgarh At Ranakpur • Dharamshalas / dormitories At Udaipur • RTDC hotels • Private hotels	• Udaipur–100 Kms • Mount Abu–240 Kms	• Popular for nature treks • Scope for other tourism products such as paragliding, etc.
4	Phulwari Ki Nal W.L. Sanctuary	493	• Four horned antelope, leopard, hyena, chinkara, wild boar and 120 species of birds	• Forest Resthouse, Kotra	• Udaipur–120 Kms	• Close to Udaipur • Can be promoted for nature treks
5	Todgarh Raoli W.L. Sanctuary	463	• Leopard, wild boars, hyena, sloth bear, jackal, sambhar, etc.	• Forest Resthouse	• Beawar–47 Kms on NH8	
6	Sitamata W.L. Sanctuary	423	• Panther, chinkara, sambhar, wild boar, wolf, jackal, hyena, etc.	• Forest Resthouse At Chittaurgarh • Private hotels • RTDC hotel	• Chittaurgarh–45 Kms	• Not very accessible
7	Ramgarh Vishdhari W.L. Sanctuary	253	• Tiger, leopard, wolf, sloth bear, sambhar, neelgai and birds • Ramgarh Palace and Cenotaphs	At Kota • Forest Resthouse • Government Circuit house At Bundi • RTDC hotel • Private hotels	• Bundi–50 Kms • Kota–88 Kms	
8	Jamva Ramgarh W.L. Sanctuary	300	• Panther, chital, wild boar, hyena, etc. • Ramgarh Fort	At Jaipur • RTDC hotels • Private hotels	• Jaipur–35 Kms	• High potential for nature tourism being closer to Jaipur

Sr. No.	Protected Area	Area (sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access	Comments
9	Mount Abu W.L. Sanctuary	328	• Panther, wild boar, hyena, sambhar, sloth bear, etc. • Nakki Lake, Delwara Temples, Gurushikhar at Mount Abu	At Mount Abu • RTDC hotels • Forest Resthouse • Govt. Circuit house • Private hotels	• Mount Abu–10 Kms	• High potential for nature tourism and related products
10	National Chambal W.L. Sanctuary	280	• Sun basking Gavials in winter on the river banks	At Kota • RTDC hotel • Forest Resthouse • Government Circuit house	• Kota–80 Kms	
11	Darrah W.L. Sanctuary	274	• Panther, sloth bear, hyena, jackal, wolf, etc. • Visit Ramgarh Vishdhari Sanctuary, Jawahar Sagar Sanctuary and Kota Barrage	At Kota • Forest Resthouse • RTDC hotel • Government Circuit house	• Kota–47 Kms on NH12	
12	Bhainsrodgarh W.L. Sanctuary	229	• Panther, chinkara, jackal, hyena, sambhar, etc. • Also visit to Fort, Gaiparnath temple and Pratapsagar Dam	At Kota • Forest Resthouse • RTDC hotel • Government Circuit house	• Kota–55 Kms • Chittaurgarh–150 Kms	
13	Bund Baretha W.L. Sanctuary	199	• Leopard, hyena, jungle cat, chital, sambhar, etc. • Visit to Bharatpur	At Bharatpur • RTDC hotel • Forest Resthouse • Private hotels	• Bharatpur–45 Kms	
14	Bassi W.L. Sanctuary	139	• Panther, four horned antelope, hyena, jackal, chital, etc. • Visit to Chittaurgarh Fort	At Chittaurgarh • RTDC hotel • Private hotels	• Chittaurgarh–25 Kms	
15	Jawahar Sagar W.L. Sanctuary	153	• Gavial, Crocodile, sambhar, chital, wild boar, sloth bear, etc. • Also visit to Kota dam, Garadia Mahadev, Gaiparnath Temple	At Kota • Forest Resthouse • RTDC hotel • Government Circuit house	• Kota–35 Kms	
16	Shergarh W.L. Sanctuary	99	• Leopard, hyena, wild boar, chital, sambhar, sloth	• Haveli Shergarh Hotel	• Kota–130 Kms	

Sr. No.	Protected Area	Area (sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access	Comments
			bear, etc. • Also visit to Gagron Fort (40 km), Kakuni temples (30 Kms)	• Forest Resthouse At Kota • RTDC hotel • Private hotels	• Jhalawar–50 Kms • Baran–45 Kms	
17	Jaisamand W.L. Sanctuary	52	• Panther, chinkara, wild boar, hyena, jungle cat, etc. • Also visit to Jaisamand Lake	• Island Resort, Jaisamand At Udaipur • RTDC/ITDC hotels • Private hotels	• Udaipur–45 Kms	• Can be developed alongwith the Jaisamand Lake for Nature Tourism
18	Nahargarh W.L. Sanctuary	50	• Leopard, hyena, wild boar, fox, jackal and migratory and land birds • Also visit to Nahargarh, Jaigarh, Amer, Keast Kyari, Lake Bhavsagar	Jaipur • RTDC/ITDC hotels • Private hotels • Forest Resthouse	• Outskirts of Jaipur	
19	Sajjangarh W.L. Sanctuary	9	• Panther, chinkara, sambhar, chital, hyena, jackal, langur, etc. • Also visit Sajjangarh Fort	At Udaipur • RTDC/ITDC hotels • Private hotels	• Outskirts of Udaipur	• Potential for nature treks
20	Ramsagar W.L. Sanctuary	34	• Panther, chital, wild boar, neelgai, bear, etc.	•	• Dhaulpur–33 Kms	
21	Van Vihar W.L. Sanctuary	26	• Insignificant fauna	•	• Dhaulpur	
22	Kesarbagh W.L. Sanctuary	15	• Insignificant fauna	•	• Dhaulpur	
23	Talchappar W.L. Sanctuary	7	• Black buck and migratory birds	In Shekhawati • Private hotels • Heritage hotels	• Churu–100 Kms	
	TOTAL	**9161**				

Lakes and Hill Stations

5.6.5 Rajasthan also has many lakes and other water bodies that make a good attraction for the tourists for sightseeing as well as boating/aqua tourism/aqua sport activities. Some of these lakes are artificial and were built by the erstwhile rulers. A list of major lakes that have become important tourist attractions are provided in Exhibit 5.13

Exhibit 5.13

Major Lakes of Rajasthan

LAKES	NEAREST MAIN TOURIST CITY	COMMENTS
▪ Anna Sagar	▪ Ajmer	▪ Marble Pavilions ▪ Developed as a picnic spot with food courts, etc.
▪ Foy Sagar	▪ Ajmer	▪ Artificial lake created under the famine relief project, now a picnic spot
▪ Pushkar Lake	▪ Pushkar	▪ Situated at the edge of the desert and surrounded b hills on three sides ▪ Primarily a religious place
▪ Siliserh Lake	▪ Sariska, Alwar	▪ A weekend destination for Delhi and Jaipur locals ▪ Has the Lake Palace Hotel and food facilities therein. Boating facilities are also offered
▪ Gadisar Lake	▪ Jaisalmer	▪ Rain water lake ▪ Boating facilities offered
▪ Balsamand Lake	▪ Jodhpur	▪ Artificial Lake
▪ Rajsamand Lake	▪ Rajsamand	▪ Famous for the Kankroli temple and the ornamenta arches and chhatries on the banks. Serves as a hangout place for tourist visiting temples
▪ Nakki Lake	▪ Mount Abu	▪ Lake at the only hill station in Rajasthan ▪ Offers boating facilities for tourists
▪ Pichhola Lake	▪ Udaipur	▪ Famous for the Lake Palace. No commercial activities around the Lake. However, many hotels on the banks
▪ Sambhar Lake	▪ Jaipur	▪ The largest inland salt water lake in India ▪ Few tourist facilities around
▪ Jaisamand	▪ Udaipur	▪ Second largest artificial lake in Asia ▪ One island resort and very few tourist facilities around
▪ Fatehsagar Lake	▪ Udaipur	▪ Houses the famous Nehru Park/ garden situated on an island on the lake, surrounded by mountains on three sides ▪ Serves as hangout place for tourists

5.6.6 Mount Abu is the only hill station in Rajasthan. It is situated at 1720 m above the sea level and is located at the southwestern tip of the Aravalis. Mount Abu is a popular weekend destination especially for tourists coming from adjoining Gujarat. It also houses the beautiful Delwara temples. However, given its since the existing infrastructure is highly stretched and the carrying capacity of the location is increasingly becoming an issue – for this reason construction of new hotels/accommodation facilities at Mt Abu is now restricted.

Monuments

5.6.7 Rajasthan is richly endowed with historical, religious, cultural and nature sites. It houses old monuments such as forts, palaces, havelis, memorials, cenotaphs, towers, statues, etc. of various centuries. These historical monuments are currently under various agencies such as the State Government, Archaeological Survey of India and Archaeology and Museums Department. A large number of monuments such as palaces, havelis and others are still owned by the erstwhile rulers and the private trusts setup by them. Exhibit 5.14 provides a list of important monuments in the state.

5.6.8 Given the vast number of monuments in the state, conservation and maintenance of the same is a critical issue. The government has therefore initiated a scheme of adoption of monuments by individuals and private parties, whereby these individuals and private parties contribute towards conserving/ maintaining the adopted monuments under the overall control of DoT.

Exhibit 5.14

Major Monuments in Rajasthan

Forts and Palaces	Havelis, Cenotaphs and others	Religious Places
Amer Fort (Jaipur)	Adhai Din ka Jhopda (Ajmer)	Kanak Vrindavan Temple Complex (Jaipur)
Hawa Mahal (Jaipur)	Moosi Rani ki Chhatri (Alwar)	Dargah Sharif
City Palace (Jaipur)	Buddhist Ruins (Viratnagar)	Bhramha Temple- Pushkar
Jal Mahal Palace (Jaipur)	Arthuna ruins (Banswara)	Pushkar Ghats- Pushkar
Nahargarh Fort (Jaipur)	Devi Kund Cenotaphs (Bikaner)	Abdulla Pir (Banswara)
Taragarh Fort (Ajmer)	Raniji ki Baori (Bundi)	Madareshwar Temple (Banswara)
Bala Qila (Alwar)	84 Pillared Cenotaph (Bundi)	Tripura Sundari (Banswara)
City Palace (Alwar)	Vijay Stambh (Chittaurgarh)	Kiradu Temples (Barmer)
Sariska Palace	Kirti Stambh (Chittaurgarh)	Bhandasar Jain Temple (Bikaner)
Siliserh Palace Hotel	Abhaneri Well (Dausa)	Deshnok Karni Mata Temple (Bikaner)
Juna Barmer Fort ruins	Manak Chowk and Havelis (Jaisalmer)	Shri Kolayat Shrine (Bikaner)
Lohagarh Fort and Palace (Bharatpur)	Patwon ki Haveli (Jaisalmer)	Deo Somnath (Dungarpur)
Deeg Palace (Bharatpur)	Nathmalji ki Haveli (Jaisalmer)	Galiyakot (Dungarpur)
Junagarh Fort and Palace (Bikaner)	Salim Singhji ki Haveli (Jaisalmer)	Jaisalmer fort Jain Temples
Lalgarh Palace (Bikaner)	Tazia Tower (Jaisalmer)	Lodurva Temple (Jaisalmer)
Gajner Palace (Bikaner)	Jhalarapatan (Jhalawar)	Chandrabhaga Temples (Jhalawar
Taragarh (Bundi)	Jaswant Thada (Jodhpur)	Ranakpur Temples (Pali)
Chittaurgarh Fort and Palaces	Mandore Cenotaphs and Hall of Heroes (Jodhpur)	Delwara Temples (Sirohi)
Udai Bilas Palace (Dungarpur)	Haldighati (Rajsamand)	Khatu Shyamji (Shekhawati)
Jun Mahal (Dungarpur)	Havelis of Shekhawati	Jagmandir Temple (Udaipur)
Jaisalmer Fort and Palaces	Saheliyon ki Bari (Udaipur)	Eklingji (Rajsamand)
Gagron Fort (Jhalawar)		Nathdwara (Rajsamand)
Jhalawar Fort		Jagat Temples (Udaipur)
Mehrangarh Fort (Jodhpur)		
Umaid Bhavan Palace (Jodhpur)		
Kumbhalgarh Fort (Rajsamand)		
Nagaur Fort (Nagaur)		
Ranthambhor Fort (Sawai Madhopur)		
Nawalgarh Fort and Palace (Shekhawati)		
City Palace (Udaipur)		
Lake Palace (Udaipur)		
Sajjangarh Fort and Palace (Udaipur)		

5.7 OTHER TOURIST RELEVANT FACILITIES/ SERVICES

Recreational Facilities

5.7.1 Recreational facilities include resorts, amusement parks, boating facilities, camping facilities, health rejuvenation, etc. Although Rajasthan has a vast inventory of natural and cultural attractions, it traditionally had relatively few recreational facilities to offer to the tourist. However, this is changing and a beginning has already been made with recreational facilities and products such as boating, camping, hiking, horse safaris, etc., being started by private entrepreneurs at various tourist places.

5.7.2 Camping facilities are provided at places like Ranthambhor, Sam and Khuri (near Jaisalmer), Dausa (on Jaipur – Agra highway), Chetoli (near Kotputli on Delhi-Jaipur highway), Kheechan (near Phalodi on Jaisalmer- Bikaner highway) and Manwar (Jaisalmer-Jodhpur highway).

5.7.3 Of late, resorts, theme parks and health rejuvenation/spa resorts are increasingly being set up by the private sectors and Rajasthan now has close to 30 resort hotels offering the tourist leisure experience (including an upmarket spa resort near Jaipur ‘s of the Oberoi group). A large number of such resorts are currently concentrated in South Rajasthan around Udaipur, mainly catering to domestic tourists coming from Gujarat.

5.7.4 Rajasthan has developed centres for alternate medication and lifestyles. Large number of these centres exist in Jaipur and other parts of Rajasthan. Some of these are The Government Yogic Treatment cum Research Centre, National Institute of Ayurveda, Nature Cure Centre, Shri Mahaveerji Sansthan, SPG Kayakalp Centre, etc. Besides these, many private hotels like Raj Vilas, Sariska Palace, etc. have started offering health packages to the tourists.

Cultural Complexes

5.7.5 Rajasthan is rich in its cultural diversity with each region in the state having its own identity in terms of traditions and customs, lifestyle, art, music and dances, attire and cuisine. The visiting tourist can experience this diversity while traveling in the state and also through various museums and fairs and festivals. However, there is a need to make this diversity reach the tourist ‘at one place’ whereby he can understand, appreciate and have a participative cultural experience.

5.7.6 Presently, this integrated promotion of the cultural diversity to the tourist is done through initiatives such as Shilpgram (Udaipur) run by Western Zone Cultural Complex and Bhartiya Lok Kala Museum (Udaipur). Choki Dhani (Jaipur), started by a private entrepreneur is also an example of a cultural complex operating on a commercial format.

Shopping Facilities

5.7.7 Shopping is another complementary activity that contributes to the overall attractiveness of a tourism destination. Rajasthan’s cultural heritage translates itself into various art-form expressed through textiles, wood-carvings, paintings, stone-carvings, gemstones and jewelry, leather products, etc. As such, Rajasthan has a lot to offer to the tourist in terms of range of goods available. However, the local industries are scattered across the state and have a very fragmented and small scale dominated retail base.

5.7.8 The location and distribution of shopping facilities is largely unorganised. Shopping areas have developed closer to the tourist attractions. At times, these areas are congested and crowded, failing to give the tourist a leisure shopping experience.

5.7.9 There are exceptions, however, in the form of a few organised setups like Rajasthali (Government of Rajasthan undertaking), Cottage Industries Emporium (Private), Central Cottage Industries Emporium (Private) who have a network of retail outlets in major tourist cities in the state. Besides these there are Government approved souvenir shops in all major tourist cities and towns though they are out-numbered by small, unorganised set-ups.

Other Facilities

5.7.10 Besides these, there are other facilities such as communication facilities, banks and exchange facilities, etc. which also form an essential part of the tourism infrastructure. These services are well developed in Rajasthan, given the large number of foreign tourist arrivals in the state. Banks and Money Exchanges are available in all major cities of the state. Similarly, most hotels in the state offer communication facilities (STD, ISD, Internet) to their customers.

5.8 TOURISM RELATED SUPPORT INFRASTRUCTURE

5.8.1 One of the important tourism related support infrastructure are training institutes for developing quality human resources for tourism industry.

5.8.2 Currently, there are a few institutes that offer training/ courses in travel and tourism management, hotel management and catering. Rajasthan Institute of Travel and Tourism Management (RITTMAN) functioning as a regional chapter of IITTM at Jaipur offers courses and other programmes in various travel and tourism areas. Similarly, there are presently 3 Food Craft Institutes in Rajasthan. These are run by DoT. Similarly, as an ongoing activity, DoT conducts specialised training and refresher programmes for guides.

5.8.3 In keeping with the changing demand of tourism related jobs, the DoT Rajasthan plans to further strengthen these institutes in terms of the courses offered and their reach.

5.9 FUTURE THRUST AREAS FOR TOURISM INFRASTRUCTURE DEVELOPMENT

State Govt. Outlay on Tourism and Existing Tourism Projects under Implementation

5.9.1 The State Government’s total outlay on tourism development in the state for the 9th Plan (1997-2002) was Rs. 303.1 Cr. Under this plan the DoT, had proposed the following major areas for investment:

- Development of Desert Circuit
- Development of Tourist sites
- Upgradation of Jaipur Airport
- Food Craft Institutes

5.9.2 The expenditure upto 31st March, 2001 on tourism related projects has been Rs. 251.32 Cr. For the year 2001-02 (last year of the 9th Plan), the budgeted outlay was Rs. 100.1 Cr. The main projects under implementation under the 9th plan (1997-2002) are given in Exhibit 5.15 below.

Exhibit 5.15

Main Tourism Projects (above Rs. 50 Lakhs) of 9th FYP under Implementation

Project	Executing Agency	Total Cost (Rs. Lakhs)
Development Works under the State Plan		
Repairs of Moat Wall at Junagarh	AVS	64.12
Development of Kirodi, Jhunjhunun	DRDA	143.60
Development of Osiyan Temple, Jodhpur	A & M	90.03
Shilpgram, Sawai Madhopur	Collector	58.00
Sound and Light Show, Udaipur	RTDC	108.17
Development of Kiradu Temple, Barmer	A & M	110.00
Royal Chhatri, Mandore	A & M	85.00
Development of Hadoti circuit	RTDC	50.00
Development works under Centre Sponsored Schemes		
Integrated Development of Place of Pilgrimage Pushkar Ghats, Ajmer	RTDC	58.62
Integrated Development of Vishram Sthali on Pushkar Road, Ajmer	RTDC	93.39
Sound and light show at Amer	RTDC & ITDC	140.66
Integrated Development of Important Tourist Places in Hadoti Region	A & M	99.00
Upgradation of Hotel Moomal, Jaisalmer	RTDC	48.80
Upgradation of Hotel Ghoomar, Jodhpur	RTDC	49.88
Upgradation of Hotel Shikhar, Mount Abu	RTDC	49.83
Upgradation of Hotel Kajri, Udaipur	RTDC	49.90
Refurbishment work at Kiradu Temples	A & M	50.00
Development of Kamra Khas at Bharatpur	A & M	50.00
Conservation work of Albert Hall, Jaipur	A & M	50.00
Conservation of Cenotaphs at Mandore Garden, Jodhpur	A & M	50.00
Development work at Fatehprakash Museum, Chittaurgarh	A & M	50.00
Conservation of Amber Fort, Jaipur	A & M	80.00
Development of Ghat at Ramdeora, Jaisalmer	RTDC	49.99

Note: A&M – Archaeology & Museum, DRDA – District Rural Development Agency

5.9.3 DoT has also prioritised projects that will be undertaken for further development of the tourism infrastructure. The list of proposed projects are provided below in Exhibit 5.16

Exhibit 5.16

List of Proposed Projects

Sr. No.	Name of the Project	Estimated Cost (Rs. Lakhs)	Executing Agency
1	Construction of Food Crafts Institute, Jodhpur	265.55	RSBCC
2	Sound and Light Show, Mandore Gardens, Jodhpur	102.00	ITDC
3	Interpretation Centre at Ranthambhor and Bharatpur	67.00	Forest Department
4	Refurbishment of Gagron Fort, Jhalawar	50.00	A & M
5	Development of Elephant Village, Amber	50.00	JDA
6	Cleaning and Repairing of Sujanganga, Bharatpur	50.00	UIT
7	Internal paving for approach and refurbishment of Jalore Fort	50.00	A & M

5.9.4 Most of the projects undertaken and proposed by the DoT through its implementing agencies relate to the refurbishment and conservation of the existing tourism assets such as monuments, sanctuaries, hotels, midways and TRCs / TIBs. Other projects include creation of new assets like site interpretation services, sound and light shows, public convenience centres, etc.

Other Important Projects

5.9.5 Apart from the above projects there are a few large projects being implemented in the state. Some of the prestigious tourism-related projects under implementation in the state are:

- **Jaipur International Airport Project**: The Jaipur airport is being upgraded to an International airport. It has been proposed to take up the extension of runway from 7500 ft. to 9000 ft. and construction of new control tower and parking bays. The airport upgradation project is being implemented through the efforts of RTDC supported by AAI.
- **Jal Mahal Tourism Infrastructure Project (JTIP)**: The JTIP proposes to refurbish the Jal Mahal Palace and develop infrastructure in the near vicinity. This includes refurbishing Jal Mahal, developing boating, building tourist cottages and clubs, developing heritage village and crafts market, etc. It is estimated to cost approx. Rs.70 Cr. and is being developed with active participation from the private sector.
- **Mewar Complex Project**: Places connected with the life of Maharana Pratap are being developed as tourist locations under the Mewar Complex project. These places include Kumbhalgarh, Chittaurgarh, Haldighati, Gogunda and Chawand. The project envisages creation of basic tourism infrastructure, beautification and creation of interpretation facilities at these places.
- **Jaipur Film City Project**: The state government is planning to develop a film city near Jaipur at Jamdoli for which it has acquired 1,000 acres of land. The government has chalked out incentives to attract Mumbai film industry producers and investors to set up studios and multiplex cinema theatres. This initiative is expected to attract more domestic tourists to the city.
- **Various Hotel Projects across the State**: The private sector on its part is instrumental in creating infrastructure like hotels and resorts in the state. Some of the large hotel projects proposed in the state are Vision Hotels and Resorts (Leela Group), Marwar Hotels (Accor Group), EIH Ltd. (Oberoi Group), Royale Manor Hotels and Industries Ltd., in Udaipur, Suman Motels, Bharat Hotels and Jaypee Hotels (Jaiprakash Group) in Jaipur, Suman Motels, Marwar Hotels (Accor Group) in Jaisalmer and Royale Manor Hotels and Industries Ltd. in Jodhpur

5.9.6 The Tourism Policy of Rajasthan, 2001 has outlined various plans and schemes of the State Government for the sector. It is envisaged that, the State Government will primarily play a catalyst’s role, thereby encouraging private sector participation in developing tourism infrastructure. Some of the initiatives in this direction are detailed subsequently.

Thrust Areas for Tourism Infrastructure Development

5.9.7 The State Government has identified the following tourism thrust areas for development:

Accommodation

- Encourage more private investment in the hotel industry by providing them various incentives and identifying land/ areas for such projects
- Encourage the establishment of Heritage hotels in the State to provide reasonable accommodation for tourists and also preserve historical heritage from dilapidation
- Strengthen and extend paying guest accommodation availability through the currently operational Paying Guest Scheme

Travel and Transport

- Strengthen the rail infrastructure by increasing broad gauge rail connectivity between tourist cities/ towns and providing trains at tourist convenient timings
- Upgrade existing road links, increasing reasonable surface transport facilities such as AC coaches, tourist cars, etc and standardise charges for various services across the State
- Encourage air-taxi services between various cities/ towns by setting up required facilities
- Identify and set-up wayside facility locations across the State

Monuments

- Develop various Nazool properties owned by the State Government in collaboration with private entrepreneurs
- Develop land/ properties belonging to the Devasthan Department

New Tourism products

- Encourage new tourism ventures such as camping sites, eco-friendly nature tourism, rural tourism, adventure tourism etc.

Information and promotion

- Augment dissemination of information at local level by upgrading the existing Tourist Reception/ Information Centres and establishing newer Centres/ Kiosks closer to main tourist locations/ attractions
- Optimise marketing efforts through use of different media and marketing instruments

Others

- Develop tourism support infrastructure and human resources through the setting up of a Rajasthan Institute of Tourism and Travel Management (RITTMAN)

5.9.8 Based on the above, DoT has identified various project areas in which private participation/ investment in tourism is actively sought. The list of these project areas is provided in Exhibit 5.17

Exhibit 5.17

List of Projects Areas Identified for Private Particiapation

Direct Tourism Products	Accommodation	Road Transport	Other Transport	Other support infrastructure
▪ Water Sports (yatching, canoeing, kayaking) ▪ Camp Tourism ▪ River cruises ▪ Palace on Waves (Houseboats) ▪ Canal Safaris in Indira Gandhi Canal Project ▪ Heritage Museum	▪ Hotels (budget, economy, resort, star) ▪ Heritage hotels ▪ Camp Sites ▪ Paying guest accommodation	Tourist toll roads at various locations such as: ▪ Chomu–Samode ▪ Khekara–Kumbhalgarh ▪ Pali–Narlai ▪ Udaipur – Jagat ▪ Banswara – Arthuna	▪ Special tourist trains ▪ Air taxi services ▪ Helicopter services	▪ Handicraft marts / Shilpgram ▪ Hotel Management and Food Craft Institutes at Udaipur, Jodhpur, Bikaner, Mt. Abu and Kota ▪ Foreign Language schools ▪ Ropeways ▪ Water supply and sewerage schemes ▪ Transport terminals

5.10 SWOT OF RAJASTHAN TOURISM

5.10.1 As seen from the preceding chapter and section, Rajasthan has a favorable inventory of tourism assets in terms of core infrastructure and support facilities. These assets have been built over the years through state funding and private initiatives. Even the new tourism products like safaris, adventure sports, rural tourism have been developed along the existing assets like forts, palaces and sanctuaries. What the state lacks is in development of unique tourism products that would attract an entirely new category of tourists and a strong and focused Marketing Plan. Based on the above, the SWOT for Rajasthan Tourism is provided in Exhibit 5.18.

Exhibit 5.18

SWOT Analysis

STRENGTHS	WEAKNESSES
• Vast inventory of attractions (Natural, Historical, Cultural, Archaeological, Religious, Architectural) • Basic tourism infrastructure in place (Almost 4 decades old tourism industry) Diversity of attractions–some unique attractions • Proximity to Delhi-a premier gateway to the country for foreign tourists Hospitable nature of the local populace No history of law and order problems Well distributed tourist attractions in the state	• Socio-economically underdeveloped state • Harsh climatic conditions-restricting tourist season • Shares a long (often hostile) border with Pakistan • Most tourist locations also happen to be places of economic activity-resulting into overcrowded tourist places/ towns • 'Problems of plenty'-Large number of similar tourist attractions in the state leading to loss of tourist interest to visit them • Unorganised and fragmented tourism industry-Lack of trained manpower • Lack of community appreciation of tourism as a sustainable source of income • Poor image of India abroad
OPPORTUNITIES	**THREATS**

• Tourists are becoming more interested in self-improvement and lifelong learnings resulting into participatory, intellectually stimulating and purposeful tourism experiences • Increasing desire to escape urban environment-opportunity for rural tourism • Tourists seeking 'authentic' experiences-opportunity for heritage tourism • Increasing domestic tourism demand • Conversion of Jaipur Airport into an International Airport	• Political instability in the country • Rapidly emerging competing destinations within and outside the country-Increasing popularity of these destinations • Foreign visitors seeking value for money (VFM) experience in the state • Modern technology (Internet) has led to greater exchange of tourism experiences • One bad experience could lead to losing many future tourists

CHAPTER 6 :

TOURIST CIRCUIT / LOCATION WISE: EXISTING STATUS, ONGOING AND PROPOSED PROJECTS

This chapter contains an analysis of existing status, ongoing and new projects for each of the major circuits in Rajasthan as follows:

- Overview of the circuit
- Main tourist spots and attractions and tourist traffic trends
- Direct tourism infrastructure (Existing, ongoing and new / identified projects)
- Connectivity infrastructure (Existing, ongoing and new / identified projects)
- Tourist forecast for key locations in the circuit

6.1 INTRODUCTION

6.1.1 This chapter provides an analysis of the identified tourism circuits in terms of, the existing tourism scenario in the circuit, evaluation of their future tourism potential and forecast tourist traffic and the infrastructure required for tapping this potential in terms of both ongoing and new projects. The analysis of each circuit covers the following areas:

- **Overview of the circuit**: This section includes a brief background to the circuit in terms of its history, geography, topography, etc.
- **Main tourist spots and attractions**: This section identifies the main tourists spots and their attractions
- **Connectivity Infrastructure**: This will include an analysis of the inter-circuit as well as the intra-circuit connectivity for each circuit in terms of the availability of infrastructure links and the quality of the associated services by:
  a) Air
  b) Rail
  c) Road

- **Direct relevant infrastructure**: This section will include analysis of the following direct tourism infrastructure heads in terms of current status, gaps, ongoing and proposed / identified projects and new projects.
    a) Accommodation (hotels, heritage hotels, paying guests facilities, etc.). The demand supply gaps and future requirement forecasts for accommodation for important locations in each circuit will be dealt with in detail in Chapter 8.
    b) Midway facilities
    c) Tourist offices
    d) Tourist site enhancement
    e) Sanctuaries/ Eco-tourism
    f) Tourism products (ropeways, film city, amusement parks, health resorts, etc.)
- **Evaluation of the overall potential** (on various parameters) for tourism development in the particular circuit/ location
- Based on this evaluation (of future potential for tourism development) the forecast growth rates assumed for the future (short term, medium term and long term) are indicated for each of the important locations within the circuit.

  Note: Short Term: 2002-2006, Medium Term: 2007-2011, Long Term: 2012-2021

Structure of this Chapter

6.1.2 Given the fact that tourism in Rajasthan is organised on a tourist ‘circuit’ rather than ‘standalone’ destinations, the existing states and the ongoing as well as proposed projects (2001-02) are analysed on a circuit-wise basis for the following:

Section	Circuit
6.1	Desert Circuit
6.2	Mewar Circuit
6.3	Vagad Circuit
6.4	Dhundhar Circuit
6.5	Godwar Circuit
6.6	Merwara-Marwar Circuit
6.7	Brij-Mewat Circuit
6.8	Shekhawati Circuit
6.9	Hadoti Circuit

Important Note:

The projects given in this section include the following
(1) On-going Projects
(2) Proposed Projects
Based on the discussions with the DoT, these projects are expected to be competed in the short-term.
In addition to these, new project areas (based on the study) have also been identified. These projects are further elaborated in Chapter 8.

6.2 DESERT CIRCUIT

Overview of the Circuit

Background

6.2.1 The desert circuit includes three districts in western Rajasthan rising out of the golden sands of the Thar Desert. The circuit is woven around the principal tourist locations in these districts, namely, Jodhpur, Jaisalmer and Bikaner (commonly referred to as the Desert Triangle) and now increasingly the desert town of Barmer.

6.2.2 A map of the desert region showing the main tourist locations is provided in Exhibit 6.1.

Exhibit 6.1

Map of the Desert Circuit

Geography and Topography

6.2.3 The arid and forbidding Thar Desert lies in north-west Rajasthan and is characterised by shifting sand dunes and high summer temperatures of upto 45 °C. Jodhpur lies on the edge of this arid tract and is the link between the desert on the west and the semi-arid but cultivable regions to the East. The region receives very little rainfall- 90% of it in the monsoon (July-September)

6.2.4 Jodhpur with a population approx. 8.5 Lakhs is the largest city in the region. It is also the second largest city in the state. Other important cities in the region include Bikaner (population 5.3 Lakhs), Barmer (84,000) and Jaisalmer (48,000). The Desert circuit is the largest though the most sparsely populated region in the state.

6.2.5 Given the climatic profile of the Desert circuit the tourist season is limited to the winter months and almost the entire tourist traffic comes between October to March.

Travel Links

6.2.6 Jodhpur Civil Aerodrome (located 4 Kms from the city centre) is the only airport in the Desert region with daily commercial passenger flights operated by Alliance Air, and Jet Airways from Delhi, Mumbai, Jaipur and Udaipur. Commercial air services to the other airport within the region - Jaisalmer have been temporarily discontinued recently given its sensitive position near the forward areas.

6.2.7 A well-developed broad gauge rail network connects the Desert region to the main cities in the country. There are regular train services between Jodhpur and Bikaner to cities like Delhi, Mumbai, Kolkata, Chennai and Bangalore. Onward connections to Jaisalmer are available ex-Jodhpur.

6.2.8 The Desert region is also well connected by roads with National Highway (NH15) passing through Bikaner, Jaisalmer and Barmer. Jodhpur is connected to all the three places by state highways and district roads.

Major Tourist Spots and Attractions

6.2.9 Exhibit 6.2 indicates the major tourist locations and attractions in the Desert circuit. The region has several tourist attractions, though the most popular are in and around Jodhpur, Jaisalmer and Bikaner.

Exhibit 6.2

Major Tourist Locations in the Desert Circuit

District	Major Attractions	Major Day-excursions	Major Events
Jodhpur	Jodhpur City 1) Umaid Bhavan Palace and Museum 2) Mehrangarh Fort 3) Jasvant Thada (Cenotaphs) 4) Mandore Gardens 5) Balsamand Lake and Gardens	Ex-Jodhpur (1) Osiyan Temples (58 Kms)	Marwar Festival (July-August)
Jaisalmer	Jaisalmer City 1) Jaisalmer Fort 2) Gadisar Lake 3) Patwon ki Haveli (architecture) 4) Salim Singh ki Haveli (architecture) 5) Nathmalji ki Haveli (architecture) 6) Tazia Tower	Ex-Jaisalmer (7) Lodurva Temples (16 Kms) (8) Sam Sand Dunes (42 Kms) (9) Akal Fossil Park (17 Kms) (10) Desert National Park (45 Kms) (11) Khuri Village Safari (50 Kms) (12) Ramdeora temple (100 Kms)	Desert Festival (January-February)
Bikaner	Bikaner City 13) Junagarh Fort and Museums	Ex-Bikaner (17) Gainer Palace and Wildlife	Camel

District	Major Attractions	Major Day-excursions	Major Events
	(14) Lalgarh Palace (15) Camel Research Farm (16) Devi Kund	Sanctuary (32 Kms) (18) Shri Kolayat Shrine (50 Kms) (19) Deshnok Karni Mata temples (30 Kms) (20) Katriyasar Desert Village (55 Kms)	Festival (January) Kolayat Fair (November) Gangaur Festival (April)
Barmer	Barmer Town 1) Ancient fort and temple ruins 2) Sun Temple	Ex-Barmer (1) Kiradu Temples (30 Kms) (2) Khed and Jasol Temples (70 Kms)	Tilwara Cattle Fair (March-April) Khed Fair (August-September)

Main Tourist Locations and Attractions

6.2.10 Unlike most other circuits in the state, the Desert circuit does not have one particular 'hub' per se though Jodhpur is the most popular entry point. Given the large geographical area covered, the major cities in the region are hubs for the tourist undertaking local excursions. Some salient observations with respect to the main tourist locations and the type of tourists they attract are as follows:

- **Jodhpur**: Jodhpur, one of the principal cities in the circuit, has the massive 15th century Mehrangarh fort. The city also houses the grand Umaid Bhavan palace (and hotel), the only 20th century palace. Other attractions include the beautiful white marble royal cenotaphs of Jasvant Thada and the ancient capital of Marwar, Mandore with its cenotaphs and gardens. Another emerging destination, around an hour's drive from the city is the Osiyan village, which houses 15 beautifully sculpted Jain and Brahmanical temples belonging to five different centuries.
- **Jaisalmer**: Jaisalmer, the golden city of Rajasthan, is one of the favourite destinations for both domestic and foreign tourists. The main attraction is the Jaisalmer fort, which houses an entire living area within its ramparts and is known for its beautifully carved havelis and its ancient Jain temples. Attractions outside the fort, are the intricately carved havelis such as the Patwon ki Haveli and the Salim Singh ki Haveli and the Gadisar Lake. Other famous attractions ex-Jaisalmer include the Lodurva Jain temples, Sam sand dunes, the Desert National Park and the Khuri village safari. The popular tourism 'products' of the region include the desert village camps, desert safaris and the desert festival.
- **Bikaner**: Bikaner lies at the northern most point of the desert circuit, and is famous for its forts, palaces and havelis. Places of tourist interest include the Junagarh fort and museum and the Lallgarh palace. Other attractions are the Camel Research Farm and the Bhandeshwar and Sandeshwar temples (visited by the domestic tourists). The popular excursions from this city include the famous Karni Mata temple (at Deshnok), the Gajner Palace and wildlife sanctuary and Shri Kolayat temple.
- **Barmer**: A small desert town, Barmer is famous for its carved wooden furniture and hand block printing. It is best visited during the annual fairs held nearby. The places of interest in this region include the ruins of Juna Barmer and the Kiradu

temples. Other places in the district like Khed and Jasol are also known for their temple architecture.

Less frequented Tourist Locations

6.2.11 Some of the less frequented tourist locations in the area include:

- **Around Jodhpur-** The Osiyan temples: Although Osiyan is becoming popular among the tourists, the destination is still very underdeveloped in terms of direct tourist infrastructure such as hotels, signage, wayside/ midway facilities, guide services, etc.
- **Around Jaisalmer-** The Wood Fossil Park and Desert National Park : The wood fossil park at Akal and the Desert National Park near Jaisalmer seldom falls in the normal tourists itinerary and is visited primarily by nature enthusiasts.
- **Around Bikaner-** Bikaner also has good tourist locations that are currently less frequented. These include among others the Kapil Muni temple at Kolayat, Gajner Wildlife Sanctuary and the Kalibanga pre-Harappan and Harappan ruins. Katriyasar, near Bikaner is also emerging as a popular tourist destination for rural tourism.
- **Barmer** – Inspite of its unique attractions such as the Kiradu Temples and the Barmer Fort ruins, Barmer is not a part of the major tours covering the Desert Circuit largely due to its remote location and poor connectivity.

Existing Tourist Traffic Trends

6.2.12 The major tourist locations in the desert circuit include Jodhpur, Jaisalmer and Bikaner. Jodhpur ranks sixth in terms of total tourist arrivals and second in terms of foreign tourist arrivals in the state. Jaisalmer ranks fifth in terms of the foreign tourist arrivals in the state. Bikaner ranks eight in terms of the domestic tourist arrivals in the state.

6.2.13 Tourist traffic and past growth trends for the major tourist centres in the desert circuit are provided in Exhibit 6.3. The salient observations are provided below.

Exhibit 6.3

Tourist Arrivals in the Desert Circuit

Tourist Location	Category of Tourist	1996	1997	1998	1999	2000	2001	CAGR	Comments
Jodhpur	Domestic	418232	427549	364870	352707	370933	383479	-2%	More often the entry point for the desert circuit.
	Foreign	48462	49221	49007	47807	67845	69812	8%	
	Total	466694	476770	413877	400514	438778	453291	-1%	
Jaisalmer	Domestic	79901	69184	52889	35157	58578	103319	5%	Popular among both domestic and foreign tourists. Likely to emerge as the new entry point as a result of starting of a direct train from Delhi.
	Foreign	49486	57166	52299	50283	50732	46914	-1%	
	Total	129387	126350	105188	85440	109310	150233	3%	
Bikaner	Domestic	168075	196168	205976	225678	182477	185645	2%	Gradually firming up on the foreign tourist itinerary
	Foreign	19983	25479	26752	22215	28441	31441	9%	
	Total	188058	221647	232728	247893	210918	217086	3%	

Source: DoT, Rajasthan

Domestic Tourist Traffic

- The domestic traffic is highest in Jodhpur city (~4.5 Lakhs) followed by Bikaner (~1.9 Lakhs) and then Jaisalmer (~1 Lakhs). Although Jaisalmer traditionally ranks behind Jodhpur and Bikaner in terms of domestic tourist arrival numbers, it has recorded an impressive 5% growth in domestic arrivals in the past five years. The other cities have either shown a decline or have grown at a lower rate during the same period.
- Though there are other tourist spots in the region such as Barmer, Osiyan, etc. none of them currently have significant tourist traffic. Osiyan is rapidly gaining popularity amongst domestic tourists. Similarly, Barmer as well as others places such as Ramdeora, Deshnok, Kolayat record good domestic tourist arrivals during the fairs and festivals in these places

Foreign Tourist Traffic

- Jodhpur receives the highest number of foreign tourists and has also shown 8% growth in the number of tourist arrivals in the past years. Bikaner has also recorded a 9% growth in the number of foreign tourists, although it ranks behind both Jodhpur and Jaisalmer currently.
- Jaisalmer, the traditionally popular destination with the foreigners has, however, shown a decline in the number of arrivals in the same period. This decline is attributed to its proximity to the Pokhran nuclear test site, and to the India-Pakistan border. Besides, both Jodhpur and Bikaner are offering tourists new products such as the desert and village safari packages that traditionally originated ex-Jaisalmer.

Connectivity Infrastructure

6.2.14 Travel links of various tourist spots in the Desert region are shown in Exhibit 6.4

Exhibit 6.4

Travel Connectivity of Towns within the Desert Region

Sr. No.	Towns	Connectivity	Comments
1	Jodhpur	Air, Road (SH), Rail (Metre Gauge and Broad Gauge)	Important gateway to the Desert Circuit
2	Jaisalmer	Road (NH15), Rail (Broad Gauge)	Could emerge as starting point for the circuit with a direct train service from Delhi
3	Bikaner	Road (NH15), Rail (Broad Gauge and Metre Gauge)	Good connectivity with the popular Shekhawati
4	Barmer	Road (NH15), Rail (Metre Gauge)	

Air

6.2.15 Jodhpur Civil Aerodrome (located 4 Kms from the city centre) is the only airport in the Desert region operating commercial passenger flights. Regular services are offered by airliners such as Jet Airways and Alliance Air for Jodhpur to/ from Delhi and Mumbai (outside the state) and Jaipur and Udaipur. Services to Jaisalmer have been stopped due to security reasons.

6.2.16 Jodhpur's airport currently handles 6 incoming / outgoing flights per day and around 70,000 passengers per annum. The current runway can only handle smaller aircraft-

AT7 (62 seater) operated by Jet Airways and 737-100/200 (~110 seater) operated by Alliance Air. However, with only 6 flights per day the airport capacity is sufficient to meet short / medium term needs. In a longer term, there is a need to upgrade the airport at Jodhpur to handle bigger aircraft which can facilitate direct flight services from metros other than Delhi and Mumbai, particularly from Kolkata as the domestic tourist segment has shown a significant share of tourist coming from West Bengal. Direct flights from one of the cities in South India (Chennai, Bangalore or Hyderabad) would also add to the Desert Circuit's appeal with the domestic tourist from the South.

6.2.17 Subject to defence / security considerations, in the medium-long term, there is a need to reintroduce air services to Jaisalmer to make the place better accessible.

Rail

6.2.18 The Desert region is connected to the main cities in the country primarily via Jodhpur and Bikaner. Connectivity within the circuits is however inadequate. Jodhpur is connected to Bikaner and Jaisalmer independently. However, there is no direct connection between Bikaner and Jaisalmer. As a result, it is not possible to cover the entire circuit (despite there being long distance journeys) on a train.

6.2.19 Following trains are operational between the cities in the Desert circuit and the main cities in the country. There is a train service to Jodhpur from Delhi (2 trains daily), Kolkata (1 train daily), Bangalore (1 train once a week) and to Bikaner from Mumbai (1 train daily), Delhi (3 trains daily), Kolkata (1 train daily). Recently the Intercity Express from Delhi and Udaipur has been further extended upto Jaisalmer, connecting Jaisalmer with Delhi directly.

6.2.20 In the long-term extending the Delhi - Bikaner link upto Jaisalmer with a new line connecting Bikaner and Phalodi (alongside NH15) would save time by avoiding the detour required at present.

6.2.21 Presently, there is only one train from South India (Bangalore–Jodhpur) which runs once a week. There is a need to increase the existing frequency and start more train services from other locations in South India to either Jodhpur or Jaisalmer.

Road

6.2.22 The Desert circuit has excellent road connectivity. The region is well connected by roads with National Highway (NH15) passing through Bikaner, Jaisalmer and Barmer. Jodhpur is connected to Jaipur by State Highway upto Sojat (Pali district) and from there by NH14 (upto Beawar) and NH8 (further to Jaipur).

6.2.23 The Desert Circuit is popularly covered by road. There are many tour operators who offer bus/ private taxi tours for the entire region or particular cities as per tourist preferences. These facilities range from Deluxe/AC coaches to economy class facilities.

6.2.24 Apart from these, there is a good bus network of RSRTC across the region. However, most tourists do not travel by the RSRTC buses as these services are primarily geared for the local populace rather than tourist and tourist relevant facilities at the bus terminals are thus minimal.

On-going and Proposed Projects

6.2.25 Appendix 6A provides the list of proposed road construction and maintenance projects in the Desert circuit.

6.2.26 The roads within the Desert circuit which need to be prioritised for carrying repairs are listed below:

- Jodhpur to Osiyan (58 Kms)
- Gajner to Jaisalmer-Bikaner highway (4 Kms)

Tourism Related Direct Infrastructure

6.2.27 The three main cities in the Desert circuit, namely Jodhpur, Jaisalmer and Bikaner have a fairly well developed direct tourism infrastructure in terms of connectivity, accommodation, tourist information services, etc. as described below.

Accommodation

6.2.28 The tourist stay in the region (and hence the need for appropriate tourist accommodation) is concentrated in the three main cities of the region, namely, Jodhpur, Jaisalmer and Bikaner. The typical stay duration of the foreign tourist in Jodhpur and Bikaner is one day each and two days in Jaisalmer. A domestic tourist usually does not cover all the three main cities in the Desert circuit. Also, domestic pilgrim tourists traveling to religious places like Ramdeora, Kolayat and Deshnok usually stay at the smaller lodges and dharamshalas/ dormitories in these regions.

6.2.29 Exhibit 6.5 provides an overview of hotel accommodation in the Desert circuit region.

Exhibit 6.5

Accommodation in Desert Tourism Circuit- Current Status

Sr. No.	District	Location	No. of Units	No. of Rooms	Approx. No. of Beds	Of which RTDC bed capacity
1	Jodhpur	Jodhpur • Hotels • Paying Guest Accommodation	90 42	2300 150	4600 300	Ghoomar (150)
2	Jaisalmer	Jaisalmer • Hotels • Paying Guest Accommodation	46 7	1250 21	2500 42	Moomal (58)
		Sam	1	8	16	Sam Dhani (16)
		Pokhran	1	14	28	Godavan (28)
3	Bikaner	Bikaner • Hotels • Paying Guest Accommodation	40 22	950 66	1900 132	Dholamaru (54)
4	Others		15	401	802	Khartal (8)* at Barmer
	Total		**264**	**5160**	**10320**	**6 (314)**

**RTDC property proposed to be licensed with staff*

6.2.30 As seen from the Exhibit, the Desert circuit has a capacity of approx. 5160 rooms (approx. 10320 beds assuming 2 beds per rooms). Of the total room capacity, over 90%

is concentrated in the three major towns of Jodhpur, Jaisalmer and Bikaner. The distribution of hotels is reflective of the tourist distribution / arrivals in the place as discussed below:

- **Jodhpur City:** Jodhpur has the largest number of hotels and hotel rooms / bed capacity in the Desert circuit. Out of 2450 hotel rooms in Jodhpur, the number of luxury rooms is high at 514 (20%). On the other end there is a predominance of lower end / economy rooms (80%). In addition paying guest facilities are available which provide and estimated additional 150 rooms and about 300 beds.
- Based on seasonality factor tourist arrivals into the city the average bed nights required in the city are close to 2000, indicating an average occupancy of 40%. However, it is estimated that peak-time occupancy of hotels in Jodhpur would be close to 80%. Thus there is no apparent shortfall in the hotel room availability in Jodhpur at present. However, based on the trends in the mix of domestic and foreign tourist arrivals in Jodhpur, there might be a slight shortfall in the economy range hotels in the future.
- **Jaisalmer City**: Jaisalmer has relatively less number of hotels as compared to Jodhpur. There are also relatively less number of paying guest facilities in the city. Out of 1271 hotel rooms in Jaisalmer, the number of luxury rooms is just 94 and there is a predominance of lower end / economy rooms (over 90%). The tourists arriving in Jaisalmer (especially foreign tourists) seek a desert lifestyle and prefer spending the night in the desert camps at places like Khuri and Sam. This trend explains the relative paucity of luxury rooms in Jaisalmer.
- Based on seasonality factor tourist arrivals into the city the average bed nights required in the city are close to 850, indicating occupancy of 33%. During peak season the occupancy of hotels in Jaisalmer is close to 75%. Presently there is no apparent shortfall in the overall hotel room availability in Jaisalmer. Jaisalmer, however, lacks in availability in mid-price accommodation facilities.
- **Bikaner City**: Bikaner has relatively less number of hotels. Bikaner also offers the tourist with lesser number of options in terms of star category hotels. Since all the main tourist spots close to Bikaner (like Kolayat, Deshnok, and Gajner) are covered by undertaking a day trip from Bikaner, there is a limited need for hotels in the respective places.
- Gajner Palace Hotel located 30 Kms from Bikaner on the Bikaner – Jaisalmer route is a popular halt for foreign groups moving towards Jaisalmer. Based on the seasonality factor of tourist arrivals into the city the average bed nights required in the city are close to 1050, indicating occupancy of close to 50%. During peak season the occupancy of hotels in Bikaner is close to 75%. Thus, there is no apparent shortfall in overall hotel capacity currently.
- Out of 1016 hotel rooms in Bikaner, the number of luxury rooms is 259 suggesting an overcapacity in the premium luxury segment. The other categories of hotels include the economy and a large number of unregistered hotels accounting for the remaining 75% of the total room capacity. Thus, prima facie there appears to be a shortfall in the mid-price / budget category of hotels.
- **Other Locations**: Besides the above there are various heritage properties in the region, like the 30-room Fort Chanwa Luni hotel (35 Kms from Jodhpur), 24-room Jhalamand Garh (12 Kms from Jodhpur), 14-room Fort Pokhran (110 Kms from Jaisalmer) and the 21-room Fort Khejarla (84 Kms from Jodhpur). There is also the 41-tent Manwar Desert camp at Khiyansarya (110 Kms from Jodhpur). These places offer luxury accommodation catering primarily to foreign groups.

- Apart from the above, accommodation facilities are also provided at the pilgrim places in the circuit. Dharamshalas/ dormitories at Deshnok, Osiyan, Ramdeora and Shri Kolayat provide accommodation facilities to the domestic tourists.

On-going Hotel Projects

6.2.31 A list of major proposed and ongoing hotel projects in the region is provided in Exhibit 6.6. Besides few other smaller projects have been approved by DoT, a list of which is provided in Appendix 6B.

Exhibit 6.6

Proposed Luxury Hotel projects in the Desert Circuit

Sr. No.	Location	Company Name	Group / Promoter / Collaborator	Details	Investment (Rs. Cr.)	Status of the project
1	Jaisalmer	Suman Motels	Private (Indian)	40 rooms	22	Under implementation
2	Jodhpur	Royale Manor Hotels & Inds. Ltd.	Private (Indian)	NA	NA	Proposed
3	Jaisalmer	Marwar Hotels	Accor Group, France	NA	NA	Announced

Source: CMIE Infrastructure, 2001

Wayside Facilities

6.2.32 The current RTDC Midways / Wayside facilities that exist along the various tourist relevant routes in the Desert circuit are given in Exhibit 6.7

Wayside Facility Gaps

6.2.33 There are no RTDC wayside facilities on the 225 Kms stretch from Jodhpur enroute Barmer. Pachpadra (in Barmer district) is an ideal location for setting up a midway facility. This midway would cater to both; tourists traveling from Jodhpur to Barmer and those traveling from Mt. Abu to Barmer (via Jalore). Similarly, there are presently no wayside facilities on the Jaisalmer-Barmer stretch of the NH15. It is recommended that a wayside facility be constructed at the junction at Shiv (Barmer district), which would serve the Jaisalmer–Barmer and Jodhpur–Barmer routes.

6.2.34 On the Jaisalmer–Bikaner route (NH15) there is a wayside facility at Phalodi (165 Kms from Jaisalmer). There are no wayside facilities beyond Phalodi as one moves towards Bikaner (Bikaner is 165 Kms from Phalodi). It is recommended that a wayside facility be started at Nokhra.

Exhibit 6.7

Midway Facilities by RTDC in Desert Circuit

District	Place	Type/ Management	Route Catered to
Jaisalmer	Gadisar	Wayside Facility	Jaisalmer – Bikaner (NH15) Jaisalmer-Jodhpur (State Highway)
	Pokhran	RTDC Midway	Jaisalmer-Bikaner (NH15) Jaisalmer-Jodhpur (State Highway)
Jodhpur	Bap	Wayside Facility	Jaisalmer-Bikaner (NH15) Jodhpur-Osiyan (State Highway)
	Dechu	Wayside Facility	Jodhpur-Jaisalmer via Sekhala (State Highway)
	Osiyan	RTDC Midway	Jodhpur-Jaisalmer (State Highway)
	Phalodi	Wayside Facility	Jaisalmer-Bikaner (NH15)

6.2.35 Presently, the DoT does not have any plans for constructing any wayside facility / motel in the Desert circuit.

New Projects: Wayside Facilities

6.2.36 Based on the tourist movement in the Desert circuit and the tourist traffic in the coming years, wayside/ midway facilities are recommended as follows:

- On the Jodhpur-Barmer (via Kalyanpur) and Mount Abu-Barmer routes
- On the Jaisalmer-Bikaner route

Tourists Offices

6.2.37 Rajasthan Tourism has tourist offices and kiosks at several tourist places in the Desert Circuit namely, Jodhpur, Jaisalmer, Bikaner and Barmer as indicated in Exhibit 6.8

Exhibit 6.8

Tourist Information Offices in Desert Circuit

Sr. No.	District	TRC / TIB
1	Jodhpur	Regional Tourist Office, Jodhpur TRC, Jodhpur TIB, Jodhpur TIB, Airport, Jodhpur
2	Jaisalmer	TRC, Jaisalmer TIB, Jaisalmer TIB, Railway Station, Jaisalmer
3	Bikaner	TRC, Hotel Dhola Maru, Bikaner TIB, Junagarh, Bikaner
4	Barmer	TIB, Barmer

Note: At some of the places the tourist information desk is located in the RTDC hotel premises.

Tourist Offices Gaps

6.2.38 It is recommended that a small tourist information kiosk be setup at those places where the tourist requires a guide service. The function of Tourist Information Kiosk located at the site would be to provide the visiting tourists with guide service (only those registered with the DoT). The information kiosks should be located at the popular tourist places within the circuit. For example, at Mehrangarh Fort or Jaisalmer Fort, where most tourists visit, there are no tourist information services available. Similar Tourist Information Kiosk should also be setup at Osiyan.

Development of Tourist Spots / Tourist Site Enhancement

6.2.39 Monuments in Jodhpur such as Umaid Bhavan Palace, Mehrangarh Fort and Jasvant Thada are privately owned and managed. As such, they are professionally conserved and well maintained. Mandore gardens in Jodhpur are managed by the local municipality and are in need of maintenance. The fountains in the garden are dry and are full of rubbish. Similarly, other structures in the complex, though floodlit, also lack maintenance.

6.2.40 Apart from the main Osiyan temple, only a few other temples in the area is conserved or maintained. Similarly, the step-well at the place is full of hyacinth and has become a dumping ground for rubbish and needs to be cleaned up.

6.2.41 The precincts of Jaisalmer fort house an entire town as a result of which there are problems of waste discharge, which is a discomfort for the visiting tourist. This problem is aggravated by stray cattle within the fort premises.

Ongoing Projects

6.2.42 Exhibit 6.9 provides the list of developmental works being carried out in the Desert circuit under various state and central Government plans.

Exhibit 6.9

Developmental Works in the Desert Circuit

District	Name of the Project	State / CSS	Total Cost (Rs. Lakhs)	Executing Agency	Status
Jodhpur	Development of Osiyan Temples	State Plan	90.03	A & M	Ongoing
	Development of Royal Chhatri Mandore	State Plan	85.00	A & M	Ongoing
	General toilet facilities and development of Museum, Jodhpur	CSS	5.00	A & M	Ongoing
	Upgradation of Hotel Ghoomar, Jodhpur	CSS	48.80	RTDC	Ongoing
	Conservation of Cenotaphs Mandore Gardens, Jodhpur	CSS	80.00	A & M	Ongoing
	Refurbishment of city gates of Jodhpur	CSS	20.00	A & M	Proposed
	Sound and light show a Mandore Gardens, Jodhpur	CSS	102.00	ITDC	Proposed
	Construction of Food Crafts Institute, Jodhpur	CSS	265.50	RSBCC	Proposed
	Water Sports and pavement around Kaylana Lake, Jodhpur	CSS	30.00	RTDC	Proposed
	Water Sports at Takhat Sagar, Jodhpur	CSS	10.00	RTDC	Proposed
	Public convenience at Sonana Khetla Ji, Jodhpur	CSS	7.00	A & M	Proposed
Jaisalmer	Development of Akshaya Pol, Jaisalmer	State Plan	7.00	Nagar Palika	Proposed
	Conservation of Patwon ki Haveli	CSS	20.00	A & M	Ongoing
	Development of Ghat at Ram Deora	CSS	49.99	RTDC	Ongoing
	General toilet facilities including water supply arrangements and development of lawns at Museum, Jaisalmer	CSS	10.00	A & M	Ongoing
	Upgradation of Hotel Moomal, Jaisalmer	CSS	48.80	RTDC	Ongoing
	Public convenience in Dussehra Chowk, Gadisar Tank and near Patwon ki Haveli, Jaisalmer	CSS	12.00	Sulabh International	Proposed
	Parking space behind Jaisalmer Fort	CSS	9.00	Nagar Palika	Ongoing
Barmer	Development of Kiradu Temples	State Plan	110.00	A & M	Ongoing
	Refurbishment work at Kiradu Temples	CSS	50.00	A & M	Ongoing
Bikaner	Public convenience at Kolayat, Bikaner	CSS	12.00	Sulabh International	Proposed

Note: CSS: Centrally Sponsored Schemes

Source: DoT, Rajasthan

6.2.43 Apart from these ongoing and identified projects, new projects that can be taken up in the region are as follows:

- Light and sound show at Mehrangarh fort
- Development of 'tourist walkway' in Osiyan
- Restoration and conservation of step-well and temples at Osiyan
- Development of waste disposal systems at Jaisalmer fort

Sanctuaries

6.2.44 Desert National Park (DNP) near Jaisalmer is the only National Park in the Desert circuit. The details of the Desert National Park are provided in Exhibit 6.10

Exhibit 6.10

Sanctuary in Desert Circuit: Existing Status

Protected Area	Area (Sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access
Desert National Park	3162	• Sand dunes, chinkara, desert cats and foxes • Camel ride over the sand dunes	At Jaisalmer • RTDC hotel • Private hotels • Tents / Huts at Sam and Khuri	• Jaisalmer – 40 Kms • Sam – 40 Kms • Lodurva – 15 Kms • Khuri – 40 Kms

Ongoing and Proposed Projects

6.2.45 At present there is no zonation in the Desert National Park. The Management Plan prepared by the State Forest Department proposes a zonation of the National Park into Core, Buffer and Tourism Zones. The State Forest Department has identified several works to be carried out for developing Desert National Park as an Eco-tourism site. The details of the works are as provided in Exhibit 6.11.

Exhibit 6.11

Proposal for Development of Eco-Tourism at Desert National Park

Sr. No.	Details of Work	Amount (Rs. Lakhs)
1	Improvement of habitat in old closures by renewing their fencing in Sudhashri (1165 hectares) and Sam (1400 hectares)	13.00
2	Construction of Nature Trails in Sudhashri (7 Kms) and Sam (5 Kms)	2.50
3	Construction of Watch Towers in Sudhashri and Sam one each with telescopes	4.00
4	Construction of Transit huts at Sudhashri and Sam	10.00
	Total	**29.50**

Tourism Products

6.2.46 Currently, the tourism products that are being offered in the Desert region include primarily desert safaris, camel safaris/ rides and to a small extent rural camps. Some new tourism products such as ropeways (Kailana Lake to Machia Fort), eco-tourism, etc. have been identified by the DoT. Apart from these, the region also has scope/ potential to develop various other new products such as camping sites, car rallies, participative rural tourism, canal tourism, cultural complexes, etc.

Summary of Infrastructure in Desert Circuit

6.2.47 Exhibit 6.12 provides a summary of the tourism relevant infrastructure in the Desert circuit.

Exhibit 6.12

Tourism Relevant Infrastructure in Desert Circuit

Category	Current Status	Potential for Development		
		Short Term	Medium Term	Long Term
Connectivity Infrastructure	Fairly developed	✓	✓	✓
		In line with traffic growth		
Accommodation	Moderately developed	✓	✓	✓
		Capacity in the mid-range segment		
Midway/ Wayside Facilities	Fairly developed	✓		
Tourist Offices	Adequate	✓		
Others (Recreational Facilities, Shopping Facilities, etc)	Adequate	✓	✓	✓
		Organised shopping facilities retailing the local art/ handicrafts/ textiles, etc.		
Monuments/ Site Enhancement	Moderately developed	✓	✓	✓
Sanctuaries/ Eco-Tourism	Not developed	✓		
Tourism Products (Rural Tourism, Resort Tourism, Health Tourism, etc)	Not developed	✓	✓	✓

Evaluation of Potential for Tourism Growth and Traffic Forecast Assumptions

6.2.48 The evaluation of the Desert circuit from the viewpoint of potential for tourism growth in the future is based on various factors as outlined in Exhibit 6.13.

6.2.49 The Desert circuit is one of the most popular circuit amongst the tourists (especially foreign tourists) coming to Rajasthan who seek the wilderness, architecture, history, culture, religion and desert lifestyle in and around the popular locations of Jodhpur, Jaisalmer and Bikaner.

6.2.50 Although the tourist potential of Jodhpur, Jaisalmer and Bikaner in the circuit has been well exploited, there is further scope for development of Osiyan, Barmer and Nagaur, which are presently less explored. Also, a greater thrust on desert sports / adventure tourism and rural tourism is necessary to fully exploit the inherent tourist potential.

6.2.51 Overall, the desert circuit offers high potential for future growth given its uniqueness (only desert in India) for foreign and domestic tourists and its strong potential for linkage with adventure tourism, desert sports and rural tourism.

Exhibit 6.13

Desert Circuit: Evaluation of Potential for Tourism Growth

Note: 1. Tourism products like Eco-tourism, Rural Tourism, Adventure Tourism, Aqua Tourism, etc.
2. Core Infrastructure like accommodation, restaurants, wayside facilities, tour services, etc.

6.2.52 Based on this assessment the forecast growth rates for tourists traffic in the major locations within the Desert circuit are as given below in Exhibit 6.14

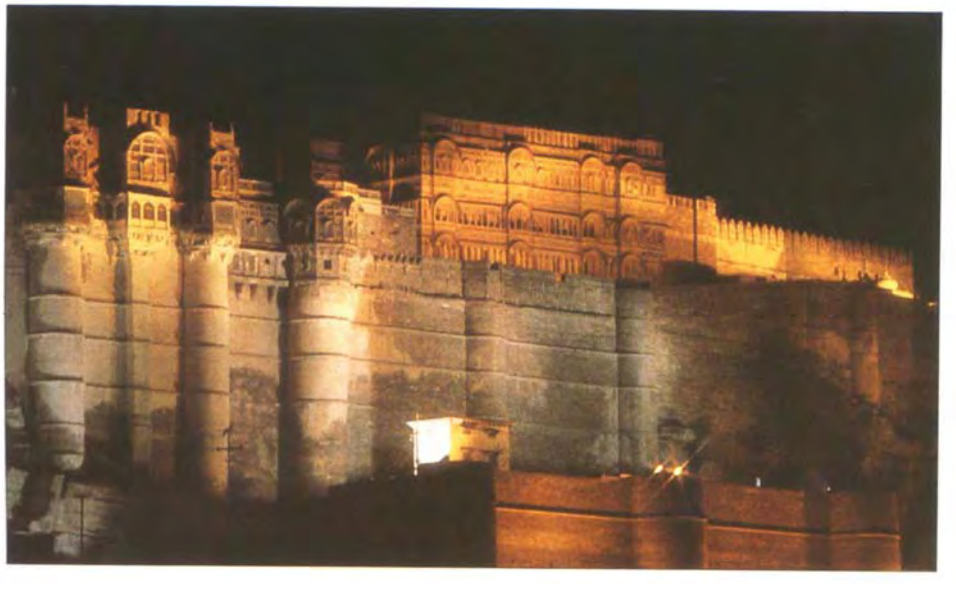
Exhibit 6.14

Desert Circuit – Forecast Growth Rates in Tourist Arrivals

Location	Tourist category	Short Term	Medium Term	Long Term
Jodhpur	Domestic	1%	2%	6%
	Foreign	5%	5%	5%
Jaisalmer	Domestic	-3%	4%	5%
	Foreign	9%	8%	8%
Bikaner	Domestic	3%	2%	2%
	Foreign	7%	7%	8%

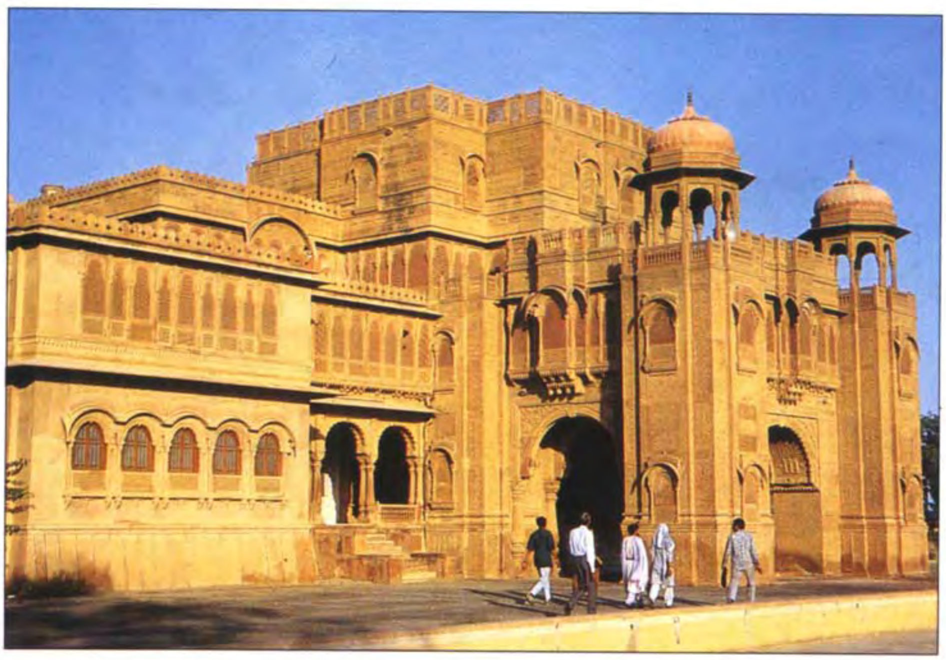
Note: Short-term growth rates are based on 'average' tourist arrival figures from 1997-2001. This has been done to discount the irregularities in tourist arrivals in the year 2001

Gadisar Lake - One of the several attractions in Jaisalmer

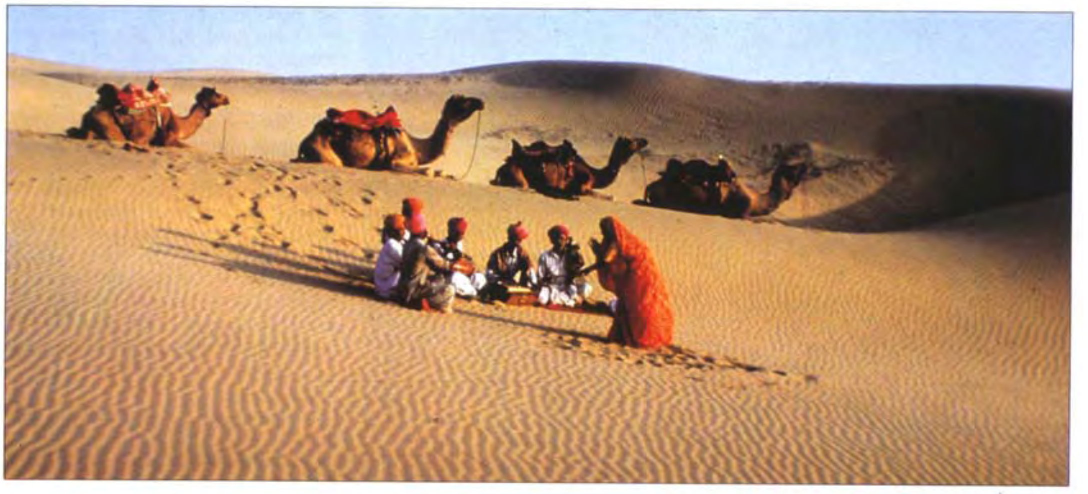


Matchless grandeur of Mehrangarh Fort, Jodhpur

Sand dunes at Sam - Popular with tourists visiting Jaisalmer



Bikaner Palace - Houses a Heritage Hotel



Panoramic Jaisalmer Desert

Junagarh Fort - Houses a famous museum

Umaid Bhavan, Jodhpur

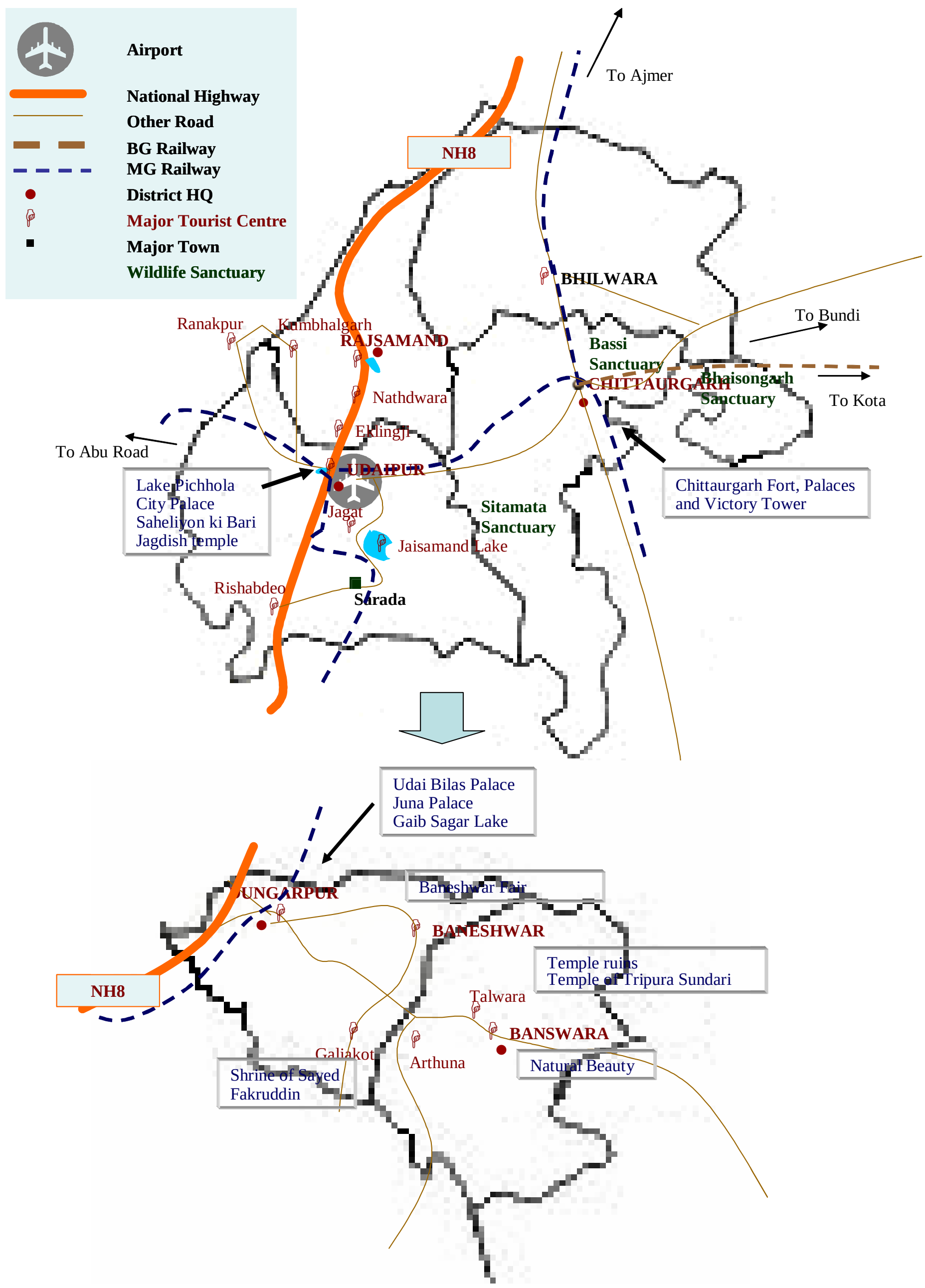
6.3 MEWAR CIRCUIT

Overview of the Circuit

6.3.1 Mewar region encompasses beautiful hills, lakes and deep valleys. The circuit offers a combination of religion and history and is particularly popular amongst the domestic tourist. This circuit primarily includes locations like Udaipur, Chittaurgarh and Nathdwara. Exhibit 6.15 provides a map of the Mewar circuit showing the main tourist locations in the circuit.

Exhibit 6.15

Tourist Map of Mewar Circuit



Geography and Topography

6.3.2 Mewar area lies to the north of the Tropic of Cancer. The climate in this area is hot during the summer months of April to June. The winters are mild and pleasant and hence the peak tourist season is from September to March. The area is a mixture of plains and hills and has large tracks of land covered by forests. With a large number of sanctuaries and lakes in the area. In general, the Mewar region in a hilly forested and lake filled region in sharp contrast to the harsh desert on its west. Udaipur with a population of 3.9 Lakhs is the largest city in the circuit.

Travel links

6.3.3 Udaipur's Dabhok airport (located around 24 Kms East of the city) is the only airport in the Mewar region. Udaipur is connected to Delhi and Mumbai (outside the state) and Jaipur and Jodhpur through daily flights.

6.3.4 The Mewar region is connected by rail to Delhi and Ahmedabad (via a metre gauge network). Chittaurgarh is the only station with broad gauge connectivity to the rest of the country via a Chittaurgarh–Kota broad gauge line.

6.3.5 The Mewar region is well connected by roads with the National highway NH8 passing through Udaipur and many important tourist locations are on/ off NH8 itself. The other tourist locations are connected by State Highway or district roads.

Major Tourist Spots and Attractions

6.3.6 Exhibit 6.16 indicates the major tourist locations in the Mewar circuit. There are a large number of tourist spots in the Mewar area, though the most popular are the ones in and around Udaipur which is the tourism hub for the region.

Exhibit 6.16

Major Tourist Locations in Mewar Region

District	Major Attractions	Major Excursions	Major Events
Udaipur	Udaipur City (1) City Palace (2) Jagdish Temple (3) Sahelion ki Bari (Gardens) (4) Pratap Memorial (5) Bhartiya Lok Kala Museum (6) Fateh Sagar Lake (7) Pichhola Lake (8) Sajjangarh Fort (9) Ahar Cenotaphs (10) Gulab Bagh (Rose Garden)	Ex-Udaipur (1) Chittaurgarh Fort (120 Kms) (2) Eklingji Temples (22 Kms) (3) Nagda (temple ruins) (23 Kms) (4) Haldighati (battle site) (40 Kms) (5) Nathdwara Temple 48 Kms) (6) Kankroli Temple (65 Kms) (7) Rajsamand Lake (66 Kms) (8) Jagat (Temple) (58 Kms) (9) Jaisamand Lake (48 Kms) (10) Gogunda (Historic site) (26 Kms) (11) Chavand (Historic site) (83 Kms) (12) Rikhabdeo (Jain Temple) (58 Kms) (13) Kumbhalgarh Fort (84 Kms)	Mewar Festival (March-April) Gangaur Festival (March-April) Teej (July-August)

Main Tourist Locations and Attractions

6.3.7 Some salient observations with respect to the main tourist and the type of tourists they direct are as follows:

- **Udaipur**: Udaipur is the main tourist centre in Mewar. The city is full of lakes and palaces. The main attractions are the City Palace, Lake Pichhola, Fateh Sager Lake, Jag Niwas Palace, Jagdish Temple, Sahelion Ki Bari, Ahar, etc. are all located within the city. Sajjangarh fort and the adjoining small wild life sanctuary are another attraction located around 8 Kms from the city. On the north of Udaipur lies Nathdwara (famous Krishna temple) Nagda (temple ruins), Eklingji (temple complex), Haldighati (battleground) visited mainly by the domestic tourists for both religious and historical purposes. Further north lies Rajsamand Lake and Kankroli. Both these tourist spots are less popular and visited only by a few domestic tourists.

- **Chittaurgarh**: Chittaurgarh, around 120 Kms east of Udaipur is very popular as a place of historical interests to domestic tourists particularly with the Bengali tourist. The fort is also gaining in popularity with foreign tourists.
- **Kumbhalgarh**: Kumbhalgarh, around 84 Kms west of Udaipur is an important location for tourists enroute Ranakpur. The fort is particularly popular with domestic tourists and known for its camping sites and horse safaris.

Less Frequented Tourist Locations

6.3.8 The Southern part of the Mewar region is relatively less frequented/ underdeveloped and not part of the main Mewar tourist circuit as follows :

- **Rikhabdeo**: Around 65 Kms South of Udaipur on NH8, it is a pilgrim centre with a temple dedicated to Rikhabdeoji, the Jain Tirthankara. It essentially attracts pilgrim traffic
- **Jaisamand Lake**: Located around 50 Kms South of Udaipur on a State highway, it is the second largest artificial lake in Asia with the Jaisamand Wild Life Sanctuary adjoining it. This tourist spot is slowly gaining in popularity partly due to the resort hotel operational at Jaisamand Lake. There is also a 10th century temple enroute at Jagat– it is popularly referred to as the 'Khajuraho of Rajasthan'.

Existing Tourist Traffic Trends

6.3.9 The major tourist locations in the Mewar region include Udaipur, Chittaurgarh and Nathdwara. Amongst all the tourist centres in Rajasthan, Udaipur is the tourism hub of Mewar and has the second place after Jaipur in terms of foreign tourist arrivals and third after Jaipur and Mount Abu in terms of domestic tourists (excluding Pushkar and Ajmer). Tourist traffic and past growth trends for major tourist centres in the Mewar region is provided in Exhibit 6.17. The salient observations are provided in the subsequent paragraphs.

Exhibit 6.17

Tourist Arrivals in Mewar Region

Tourist Location	Category of Tourist	1996	1997	1998	1999	2000	2001	CAGR	Comments
Udaipur	Indian	621516	638987	575088	578622	735333	662826	1%	Entry point from South Gujarat
	Foreign	82610	84284	78267	78708	77174	56760	-7%	
	Total	704126	723271	653355	657330	812507	719586	0%	
Nathdwara	Indian	231776	281161	326749	464136	462837	319159	7%	Popular amongst the Gujarati pilgrims
	Foreign	0	0	37	166	300	562		
	Total	231776	281161	326786	464302	463137	319721	7%	
Chittaurgarh	Indian	182400	240872	327874	150108	120145	120390	-8%	Important on domestic tourists itinerary
	Foreign	18240	13357	10453	5886	8164	7552	-16%	
	Total	200640	254229	338327	155994	128309	127942	-9%	
Rikhabdeo	Indian	8057	8754	10629	16021	36893	8200	0%	Popular amongst the Gujarati pilgrims
	Foreign	13	25	28	52	22	60	36%	
	Total	8070	8779	10657	16073	36915	8260	0%	

Source: DoT, Rajasthan

Domestic Tourist Traffic

- Domestic traffic is the highest in Udaipur city (6.6 Lakhs) followed by Nathdwara (3.2 Lakhs) and then Chittaurgarh and Ranakpur
- Growth in domestic tourist traffic has been over 7% in Nathdwara, which has become a major spot for domestic pilgrims visiting the famous temple dedicated to Lord Krishna. Domestic tourist arrivals at Chittaurgarh have shown a marginal decrease in the later half of the last decade
- Rikhabdeo, the other important pilgrim centre for domestic tourists gets approx. 20,000 tourists annually. This number has varied significantly in the past

Foreign Tourist Traffic

- Foreign tourists mainly visit Udaipur with a few taking day excursions to Chittaurgarh, although the highest growth was recorded in Chittaurgarh, which is gaining popularity. Other places of tourist interest in the Mewar area are not frequented much by foreign tourists. In fact total foreign tourist arrivals even in Udaipur are only about 55,000 which is roughly one-third the traffic in Jaipur.
- Other tourist spots in the region currently have insignificant tourist traffic. This includes tourist locations like Jaisamand, Rajsamand, etc. each of them gets few tourists (between 10-50 per day average during the season).

Connectivity Infrastructure

6.3.10 Travel links of various spots in the Mewar region are shown in Exhibit 6.18.

Exhibit 6.18

Travel Connections of Towns within the Mewar Region

Sr. No.	Towns	Connectivity	Comments
1	Udaipur	Air, Road (NH8), Rail (Metre Gauge)	Gateway to the Mewar Circuit. Gauge widening under progress Connected to Mumbai, Delhi, Jaipur and Jodhpur by flight services
2	Nathdwara	Road (NH8)	
3	Chittaurgarh	Road (SH), Rail (Broad Gauge and Metre Gauge)	Important rail junction. Road to Udaipur is being widened to 4 lane under the NHAI project

Air

6.3.11 Udaipur’s Dabhok airport (located 32 Kms from the city) is the only airport in the Mewar area and has flights connecting it to Mumbai and Delhi (outside the state) and Jaipur and Jodhpur (within Rajasthan).

6.3.12 Currently there are 6 flights landing into to Udaipur. There are 3 daily direct services from/to Mumbai (both direct) and 3 services from/to Delhi (one direct and two hopping via Jaipur/Jodhpur). Additionally, there are 2 services to Jaipur (one hopping via Jodhpur) and one service to Jodhpur.

6.3.13 With only 6 incoming flights per day at present, the airport capacity is sufficient to meet future needs. However, the current runaway at Dabok can only handle smaller aircraft (737-200 and A37 type aircraft). Thus there is a need to extend the runaway to handle bigger aircraft over the medium/ long term.

6.3.14 In the longer-term helipads/ airstrips can be developed at Chittaurgarh and Dungarpur. There is also a need to improve air services to/from Udaipur and other locations in India :

- Ahmedabad: No flight at present but a latent demand
- Delhi: 2 of the 3 flights are hopping fights. There is a need for more direct flights to Udaipur for Delhi.
- Kolkata: Tourists from Kolkata have to take a connecting flight from Delhi
- Chennai: Would bring Udaipur closer to international travelers arriving from the South and East Asian countries

Rail

6.3.15 Udaipur and the entire Mewar region is connected by rail though this is a meter gauge network, which limits the region's direct rail connectivity to the broad gauge network of the rest of the country. The only exception is Chittaurgarh (on the eastern edge of the Mewar region) which is on the broad gauge network.

6.3.16 There are 2 trains daily between Udaipur and Delhi (via Chittaurgarh) and 1 train daily between Udaipur and Ahmedabad. Additionally, there is one train daily from Jaipur, Ajmer, Khandwa and Indore stopping at Chittaurgarh.

6.3.17 Though Udaipur has a rail connection to Chittaurgarh this is a slow meter gauge line, which prevents running of faster trains. Most of the track is also single lane, which causes considerable delay in travelling. However, for shorter circuits the road route is preferred so as to enable sightseeing enroute. However, with the broad gauging work of the Udaipur–Chittaurgarh line underway, connectivity of Udaipur with other main cities is expected to improve substantially.

6.3.18 'The Palace on Wheels' is a fully air-conditioned luxury train, which runs during the peak season of September to March providing royal treatment for the tourists. This one-week trip leaves Delhi every Wednesday and travels to Jaipur, Chittaurgarh, Udaipur, Jaisalmer, Jodhpur, Bharatpur, Agra and back to Delhi. This 104 seat capacity train is very popular with the foreign tourists. However, since Udaipur lacks broad gauge connectivity the Udaipur – Chittaurgarh stretch is done by road.

6.3.19 There is a need to convert the existing metre gauge network to broad gauge on the Udaipur-Himatnagar–Ahmedabad route. This will offer broad gauge connection to Ahmedabad and Mumbai. It will also help in tourist development of Jaisamand, the entire Southern Mewar region and also of the Vagad circuit consisting of Dungarpur and Banswara.

Road

6.3.20 Udaipur lies on NH8 (Delhi-Ahmedabad highway) and is well connected to important tourist and commercial centres such as Jaipur, Delhi and Ahmedabad (which are also on NH8). Within the state Udaipur is well connected to Chittaurgarh, Jodhpur, Mount Abu, etc. Other tourist spots and places on the Mewar circuit are essentially connected to Udaipur only by road.

6.3.21 While there are about 300 RSRTC buses which operate daily from Udaipur, there are a large number of private buses/ coaches and taxies which operate as per tourist demand. These facilities range from deluxe/ AC coaches to economy class facilities. No inadequacy has been indicated on this account by any of the tour operators.

On-going and proposed Projects

6.3.22 The main national highway in the area is NH8, which connects Delhi to Bombay via Jaipur, Ajmer, Udaipur and Ahmedabad. This highway is being converted into a 4 lane highway between Delhi and Jaipur and is being widened and converted into 4 lanes between Ajmer and Udaipur on certain stretches measuring about 50 Kms under the Golden Quadrilateral project of NHAI.

6.3.23 A major state highway SH9 connects Udaipur to Chittaurgarh (via. Dabhok and Mavli). The stretch from Udaipur to Chittaurgarh is being made 4 lanes till Dabhok and 2 lanes beyond that till Chittaurgarh under a World Bank funded project worth Rs. 26 Cr.

6.3.24 The stretch from Chittaurgarh to Ajmer is also planned to be widened under another World Bank aided project costing about Rs. 39 Cr.

6.3.25 Appendix 6A provides the list of proposed road construction and maintenance projects for tourist locations in the Mewar Circuit

6.3.26 The roads within the Mewar circuit which need to be prioritised for carrying repairs are listed below:

- Udaipur–Jagat–Jaisamand–Chavand-Rikhabdeo (120 Kms)

Tourism Related Direct Infrastructure

6.3.27 The three main tourist locations in the Mewar circuit, namely Udaipur, Chittaurgarh and Nathdwara have fairly well developed direct tourism infrastructure in terms of connectivity, accommodation, tourist information services, etc.

Accommodation

6.3.28 Accommodation facilities in the Mewar area range from luxury hotels to government / RTDC tourist bungalows and paying guest facilities. The bulk of the hotel room capacity is concentrated in Udaipur City, which is the tourism hub or the Mewar circuit. Other location with a fairly developed hotel infrastructure is Chittaurgarh. The typical stay duration of domestic tourist in the region is 3 days in Udaipur, which includes a day excursion to Chittaurgarh. A typical foreign tourist spends 2–3 days in Udaipur. Very few domestic (and foreign) tourists stay in Chittaurgarh.

6.3.29 Exhibit 6.19 provides on overview of hotel accommodation in the Mewar circuit. As seen from the Exhibit, the Mewar Circuit has a capacity of approx. 4500 rooms (approx. 9000 beds). Of the total bed capacity, over 75% is concentrated in the hub city of Udaipur.

Exhibit 6.19

Accommodation in Mewar Tourism Circuit – Current Status

Sr. No.	District	Location	No. of Units	No. of Rooms	No. of Beds	Of which RTDC bed capacity
1	Udaipur	Udaipur City • Hotels • Paying Guest Accommodation	 127 134	 3031 400	 6062 800	Kajri (141)
		Jaisamand	1	40	80	
		Rikhabdeoji	3	(+25)	(+50)	Gavri (23)
2	Rajsamand	Nathdwara	4	60	106	• Gokul (24) • Yatrika (20)
		Haldighati	1	1	6	
		Kumbhalgarh	1	21	42	
3	Chittaurgarh	Chittaurgarh • Hotels • Paying Guest Accommodation	 32 9	 720 27	 1454 54	Panna (60)
4	Others		8	200	400	
		Total	**320**	**4525**	**9054**	**5 (268)**

Source: DoT, Rajasthan

Note: *1. No. of hotels includes unregistered hotels*

2. Figures in brackets indicate beds and rooms in Dharamshalas.

6.3.30 The current status of the accommodation facilities available at each of these locations is discussed below.

- **Udaipur City**: Udaipur has the largest number of hotels and hotel rooms / bed capacity in the Mewar circuit. There are also a large number of unregistered hotels and paying guest facilities in the city. Out of 3431 hotel rooms in Udaipur, the number of luxury rooms is above 400. There is a predominance of lower end / economy rooms (85%). In addition to the hotel rooms paying guest facilities are available which provide and estimated additional 400 rooms and about 800 beds.
- Based on tourist arrivals into the city, there present there is presently an over capacity in the luxury category of hotels. There may be a minor shortage in the mid-price category for a few days during the peak season only. Thus, in the long term, there could be a need for hotels in the mid-priced segment.
- **Rajsamand District**: Since all the main tourist spots in Rajsamand district like Nathdwara, Haldighati, Nagda, Rajsamand Lake, etc. are covered by tourists via a day trip from Udaipur, there is thus only a limited need for hotels in the area which is catered to by a few hotels at these locations.
- Being an important pilgrim centre, Nathdwara, has suitable low-priced accommodation (Dharamshalas, etc.) There are also two tiny hotels with a total of 8 rooms and 30 beds in dormitory style. There are also two RTDC hotels with a total of 46 beds. The pilgrim traffic (which peaks during certain festivals like Janmasthami) requires low cost accommodation which is met mainly by the existing dharamshalas.
- Several motels have opened up on the highway between Udaipur and Nathdwara that cater to the tourists traveling on their own vehicles from places in Gujarat to Nathdwara. Besides the above there is a 35 room heritage property in the district located around 135 Kms from Udaipur and is essentially a stand-alone resort that

offer luxury accommodation catering primarily to foreign tourists and foreign tour groups. There are two hotels in the Kumbhalgarh Fort area.

- **Chittaurgarh District**: Chittaurgarh has 32 hotels with about 720 hotel rooms but most of the rooms are in lower price or economy segment. There is no 3 star and above category hotel. There are only 6 hotels in the 2-star category and all the rest are in the "below 2-star" category. RTDC's Hotel Panna with 30 rooms (60 beds) is currently the largest hotel in Chittaurgarh. As in Udaipur, in Chittaurgarh also about 27 paying guest-rooms are available There are no other significant tourist accommodation facilities in the rest of the district.

- **South of Udaipur**: The tourist locations in South, are currently not part of the main tourist circuit and there are only a few hotels in the region. There is a resort at Jaisamand Lake with a capacity of 40 rooms. Two other hotel units at Jaisamand (RTDC bungalow and one ITDC hotel) have closed down. The Karni fort at Bambora village near Jaisamand lake has recently (since 1998-99) been converted into a luxury fort hotel and offers 30 rooms catering to an up-market clientele. There is also a 16 room Heritage Hotel–Fort Dhariyawad at Dhariyawad, which is close to the Sita Mata Sanctuary in the adjoining Chittaurgarh district.

6.3.31 Since there are no good/ luxury hotels at Chittaurgarh foreign tourists have traditionally avoided visiting Chittaurgarh (or alternatively visited the fort via a day trip from Udaipur) due to lack of proper eating places and accommodation suitable for foreign tourists. Given the recent growth in tourist traffic at Chittaurgarh (especially foreign tourists) there appears to be a need for an up-market hotel in the area to cater to foreign tourists.

6.3.32 Given the success of the Island Resort at Jaisamand, there appears a potential for few more (about 2) such resorts.

On-going Hotel Projects

6.3.33 A list of major proposed and ongoing hotel projects in the region is provided in Exhibit 6.20. Besides these a few other smaller projects have be approved by DoT, a list of which is provided in Appendix 6B.

6.3.34 The room capacity in the luxury category hotels in Udaipur is likely to increase further after the completion of the hotel projects mentioned above, further aggravating the problems of poor occupancy levels of these hotels.

Exhibit 6.20

Proposed Luxury Hotel Projects in the Mewar Circuit

Sr. No.	Location	Company Name	Group / Promoter / Collaborator	Details	Investment (Rs. Cr.)	Status of the Project
1	Udaipur	Vision Hotels and Resorts Ltd.	Leela Group	91 rooms	60	Under Implementation
2	Udaipur	Marwar Hotels	Accor Group, France	NA	57	Under Implementation
3	Udaipur	EIH Ltd.	Oberoi Group	NA	NA	Under Implementation
4	Udaipur	Royale Manor Hotels & Inds. Ltd.	Private (Indian)	NA	NA	Proposed

Source: CMIE Infrastructure, 2001

Wayside Facilities

6.3.35 The current RTDC Midways / Wayside facilities that exist along the various tourist relevant routes in the Mewar circuit are given in Exhibit 6.21.

Exhibit 6.21

Midway facilities by RTDC in Mewar Circuit

District	Place	Type / Management	Route Catered to
Udaipur	Gogunda	RTDC Motel*	Udaipur-Ranakpur and Udaipur-Mt Abu Road (NH76)
Rajsamand	Deogarh	RTDC Midway	Udaipur-Ajmer (NH8)
	Haldighati	RTDC Resthouse*	Nathdwara-Haldighati route (District road)

** Now privatised*

Wayside Facility Gaps

6.3.36 For tourist taking the Udaipur–Jagat-Jaisamand Lake–Chawand–Rikhabdeo route (around 120 Kms), there are very little options available for dining and refreshing along the way. It is recommended that a wayside facility (with a accommodation facility) be setup on this route.

6.3.37 Wayside facilities do not exist on the Udaipur-Chittaurgarh State highway. In order to facilitate greater tourist traffic to Chittaurgarh, it is recommended that a wayside facility be set up.

6.3.38 There is a potential to start a wayside facilities on the Udaipur–Kumbhalgarh route (84 Kms), which presently has a substantial tourist traffic movement. This facility could be located near Bhutala, where there is a fork for Haldighati and further to Nathdwara and Rajsamand.

6.3.39 The DoT, Rajasthan has identified a need to set-up a wayside facility at Menal on the Chittaurgarh–Kota route, which is also an area of tourist attraction (waterfall, forest area). Menal is a few Kms from Chittaurgarh en-route to Kota. This facility can also provide accommodation for tourists visiting Bassi sanctuary.

6.3.40 In the Mewar Circuit, the DoT has plans for constructing a Midway at Mangalwar on the Udaipur–Chittaurgarh route. This project (with an investment of Rs. 20 Lakhs) has been taken up under the Central Sponsored Scheme (CSS).

New Projects: Wayside facilities

6.3.41 The future requirements for wayside facilities are as follows:

- On the Udaipur-Jagat-Jaisamand Lake-Chawand-Rikhabdeo at Jaisamand
- On the Chittaurgarh-Kota (NH64) at Menal
- On the Kumbhalgarh-Udaipur route at Bhulala

Tourist Offices

6.3.42 RTDC has tourist offices and kiosks at all the major tourist spots in the Mewar area viz. Udaipur, Chittaurgarh and Nathdwara as indicated in Exhibit 6.22.

Exhibit 6.22

Tourist Offices in Mewar Region

Sr. No	District	TRC / TIB
1	Udaipur	Regional Tourist Office, Udaipur TRC, Udaipur TIB, Udaipur TIB, Railway Station, Udaipur TIB, Dabhok Airport, Udaipur
2	Chittaurgarh	TRC, Chittaurgarh TIB, Chittaurgarh
3	Nathdwara	TIB, Nathdwara

Tourist Offices Gaps

6.3.43 Currently there is no Rajasthan Tourism office at Rajsamand. It is recommended that Tourist Reception Centre be setup at Rajsamand.

Development of Tourist Spots/ Tourist Site Enhancement

6.3.44 The old Udaipur city, which is located on the banks of several lakes, has narrow by-lanes with old houses and havelis. A large number of these havelis have been converted to heritage hotels, thereby increasing the pressure on the civic infrastructure. The effluent of the city is discharged in the lakes as a result if which the lake water has become highly polluted.

6.3.45 Monuments in Udaipur such as City Palace and Lake Palace, which are privately owned or managed, are well maintained. Sahelion ki Bari gardens in Jodhpur, is managed by the local municipality and as such, the fountains in the garden lack maintenance.

Ongoing Projects

6.3.46 Department of Tourism, Rajasthan state is developing a Mewar Complex, which includes Kumbhalgarh, Haldighati, Chavand, Gogunda and Chetak Samadhi. While work is going on at Chetak Samadhi, a total estimate of scope or the cost of the project to be carried out at Mewar Complex is not available. Some have estimated that the total cost may be close to Rs. 2-3 Cr. The expenditure planned for the Mewar Complex includes expenditure on roads, parking facilities, land-scaping and afforestation.

6.3.47 The proposal to open a cafeteria at Chittaurgarh fort has been approved by ASI. ASI has however imposed restrictions on the operations of the cafeteria at the fort, which makes its functioning uneconomical.

6.3.48 Exhibit 6.23 provides the list of developmental works being carried out in the Mewar circuit under various state and central Government plans.

Exhibit 6.23

Developmental Works in the Mewar Circuit

District	Name of the Project	State/ CSS	Total Cost (Rs. Lakhs)	Executing Agency	Status
Udaipur	Light and Sound show at Udaipur	State Plan	108.17	RTDC	Ongoing
Udaipur, Rajsamand	Mewar Complex	State Plan	NA	PWD	Ongoing
Udaipur	Upgradation of Hotel Kairi,	CSS	49.90	RTDC	Ongoing

District	Name of the Project	State/ CSS	Total Cost (Rs. Lakhs)	Executing Agency	Status
	Udaipur				
Udaipur	Refurbishment of Palace of Rana Pratap at Chavand	CSS	25.00	A & M	Ongoing
Chittaurgarh	Toilet facilities and water supply in Museum, Chittaurgarh	CSS	8.43	A & M	Ongoing
Chittaurgarh	Development of Fateh Prakash Museum	CSS	50.00	A & M	Ongoing
	Development of TRC, Chittaurgarh	CSS	20.00	RTDC	Proposed
	Midway Mangalwar, Chittaurgarh	CSS	20.00	RTDC	Proposed
Rajsamand	Conservation works at birth place of Maharana Pratap (Kumbhalgarh)	CSS	15.00	ASI	Proposed
	Public convenience and water facility at Kumbhalgarh Fort	CSS	10.00	ASI	Proposed

CSS=Centrally Sponsored Schemes

Source: DoT, Rajasthan

6.3.49 Apart from these ongoing and identified projects, a few new projects have been identified based on the current 'gaps' for development of tourism sites in the Mewar circuit. These are:

- ❑ Development of affluent disposal system for the old city – Cleaning of Lake Pichhola at Udaipur
- ❑ Development of lake side promenade along Fateh Sagar Lake at Udaipur
- ❑ Landscaping and floodlighting of the temple complex at Jagat
- ❑ Landscaping of the Rana Pratap Memorial at Chawand
- ❑ Development of Public Garden at the lake site
- ❑ Development of parking place near the Eklingi temple complex

Sanctuaries

6.3.50 There are seven wildlife sanctuaries in Mewar circuit. The sanctuaries in the area are neither very well developed nor well advertised or marketed as tourist destinations. In addition prior permission is required from the Deputy Game Warden, Rajasthan Forests Department. The details of these sanctuaries are provided in Exhibit 6.24

Exhibit 6.24

Sanctuaries in Mewar Circuit: Existing Status

Protected Area	Area (Sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access
Kumbhalgarh W.L. Sanctuary	609	• Panther, jungle cat, hyena • Also Ranakpur temples and Kumbhalgarh Fort	• Forest Resthouse, Kumbhalgarh At Ranakpur • Dharamshalas / dormitories At Udaipur • RTDC hotels • Private hotels	• Udaipur – 100 Kms • Mount Abu – 240 Kms

Protected Area	Area (Sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access
Sitamata W.L. Sanctuary	423	• Panther, chinkara, sambhar, wild boar, wolf, jackal, hyena, etc.	• Forest Resthouse At Chittaurgarh • Private hotels • RTDC hotel	• Chittaurgarh – 45 Kms
Bhainsrodgarh W.L. Sanctuary	229	• Panther, chinkara, jackal, hyena, sambhar, etc. • Also visit to Fort, Gaiparnath temple and Pratapsagar Dam	At Kota • Forest resthouse • RTDC hotel • Government Circuit house	• Kota – 55 Kms • Chittaurgarh – 150 Kms
Bassi W.L. Sanctuary	139	• Panther, four horned antelope, hyena, jackal, chital, etc. • Visit to Chittaurgarh Fort	At Chittaurgarh • RTDC hotel • Private hotels	• Chittaurgarh – 25 Kms
Jaisamand W.L. Sanctuary	52	• Panther, chinkara, wild boar, hyena, jungle cat, etc. • Also visit to Jaisamand Lake	• Island Resort, Jaisamand At Udaipur • RTDC/ITDC hotels • Private hotels	• Udaipur – 45 Kms
Sajjangarh W.L. Sanctuary	9	• Panther, chinkara, sambhar, chital, hyena, jackal, langur, etc. • Also visit Sajjangarh Fort	At Udaipur • RTDC/ITDC hotels • Private hotels	• Outskirts of Udaipur
Phulwari Ki Nal W.L. Sanctuary	493	• Four horned antelope, leopard, hyena, chinkara, wild boar and 120 species of birds	• Forest Resthouse, Kotra	• Udaipur – 120 Kms

<u>Ongoing and Proposed projects</u>

6.3.51 Of the sanctuaries mentioned in the Exhibit, Jaisamand sanctuary in Udaipur district, Sita Mata in Chittaurgarh and Kumbhalgarh in Rajsamand district have the maximum potential for development as tourist spots.

6.3.52 The State Forest Department has identified several works to be carried out for developing wildlife sanctuaries as Eco-tourism sites. The details of the works are as provided in Exhibit 6.25

Exhibit 6.25

Proposal for Development of Eco-Tourism at Wildlife Sanctuaries in Mewar region

Sr. No.	Details of work	Amount (Rs. Lakhs)
1	Jaisamand Wildlife Sanctuary (Udaipur) • Development of Interpretation Centre at Hawa Mahal. • Development of Roothi Rani Ka Mahal into a rest house • Development of visitors path-Hawa Mahal to Roothi Rani Ka Mahal • Development of Camping sites at Dhimra Bagh • Development of visitors path-Palodara to Dhimra Bag • Development / Repair of old Aodis • Publicity and signage	70.00
2	Sajjangarh Wildlife Sanctuary (Udaipur) • Development of Sajjangarh Palace • Development of camping site • Beautification of the main road	50.00
3	Kumbhalgarh Wildlife Sanctuary (Udaipur) • Trithankar Trail, Ranakpur	85.00

Sr. No.	Details of work	Amount (Rs. Lakhs)
	• Nature Trail: Kumbhalgarh- Thandiberi • Development of Parash Ram temple Road • Camping site-Sumer • Interpretation Centre at Ranakpur • Publicity and Signage	
4	Raoli Todgarh Wildlife Sanctuary (Udaipur) • Camp site development at Raoli • Rest house and camp site at Kabra Data • Goram Ghat Train Safari • Development of Bhilberi • Publicity and Signage	65.00
5	Phulwari ki Nal Wildlife Sanctuary (Udaipur) • Camping site at Panarwa and Mamer • Nature Trails • Publicity, Education and Signage	35.00

Tourism Products

6.3.53 The tourism products present in the circuit include primarily heritage tourism, religious tourism and to a limited extent nature and leisure tourism. Some tourism products such as ropeways (Moti Magri–Sajjangarh Fort), Rural Tourism, Horse Safari, Palace on Waves, water parks, amusement parks, etc. have been identified by the DoT.

6.3.54 The region also has scope/ potential to develop various new products such as camping sites, Ropeway at Kumbhalgarh, boating facilities (motor boats, paddle boats, water scooters, water skiing, etc.) at Rajsamand, water resort/ water park, trekking camps and water sports events at Jaisamand and hand gliding at Chittaurgarh.

Summary of Infrastructure in Mewar Circuit

6.3.55 Exhibit 6.26 provides a summary of tourism relevant infrastructure in the Mewar circuit.

Exhibit 6.26

Tourism Relevant Infrastructure in Mewar Circuit

Category	Current Status	Potential for Development		
		Short Term	Medium Term	Long Term
Connectivity Infrastructure	Fairly developed	✓	✓	✓
		In line with traffic growth		
Accommodation	Fairly developed	✓	✓	✓
		In line with traffic growth		
Midway/ Wayside Facilities	Adequate	✓		
Tourist Offices	Adequate			
Others (Recreational Facilities, Shopping Facilities, etc)	Adequate	✓		
Monuments/ Site Enhancement	Well developed	✓		
Sanctuaries/ Eco-Tourism	Not developed	✓	✓	
Tourism Products (Rural Tourism, Resort Tourism, Health Tourism, etc)	Not developed		✓	✓

Evaluation of Potential for Tourism Growth and Traffic Forecast Assumptions

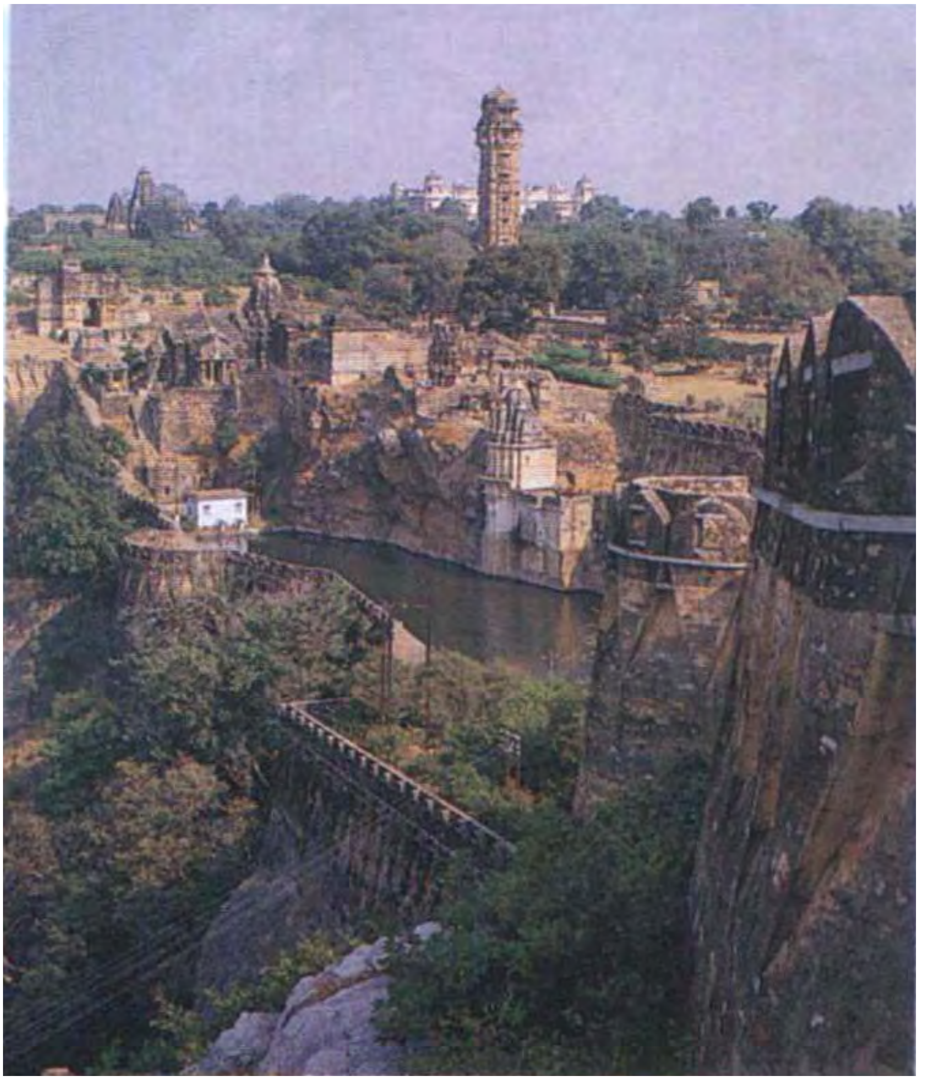
6.3.56 The evaluation of the Mewar circuit from the viewpoint of potential for tourism growth in the future is based on various factors as outlined in Exhibit 6.27.

Exhibit 6.27
Mewar Circuit: Evaluation of Potential for Tourism Growth

	Low		High	Comments
Inventory of existing attractions			■	Historic and religious attractions
Diversity of existing attractions			■	Forts, Palaces, Lakes, Temples, Handicrafts and Shopping
Number of unique attractions			■	Lake Palace, City Palace, Chittaurgarh, Kumbhalgarh, Nathdwara, Haldighati, etc.
Potential for promoting new locations and tourism products[1]		■		New attractions: Jaisamand, Jagat New tourism products: Rural Tourism, Eco-tourism, Ropeways, Convention Centre
Prima facie Tourism Potential based on attractions			■	
Present Connectivity		■		Excellent highway connection, Inadequate rail connectivity- presently only meter gauge. Limited (and only small) flights to Udaipur
Core Tourism Infrastructure[2]			■	
Opportunity for increasing the tourist season			■	High: Popular region with vacationing tourists from Gujarat. Tourist season extends into summer months of April and May
Carrying capacity		■		Carrying capacity issues at Udaipur – High concentration of hotels near Lake Pichhola
Potential for Tourism growth		■		

6.3.57 The Mewar circuit is the second most popular circuit amongst the tourists coming to Rajasthan. The circuit, centered on Udaipur, offers the tourist a diversity of attractions like the Lake Palace and City Palace, Chittaurgarh and Kumbhalgarh forts, battlefields and temples. The region is very popular for its temples (Nathdwara and Eklingji) and attracts large number of domestic tourists from the neighbouring Gujarat. Most tourist locations within the circuit are well connected by a road network. However, rail connectivity from different parts of the country to Udaipur is a constraining factor.

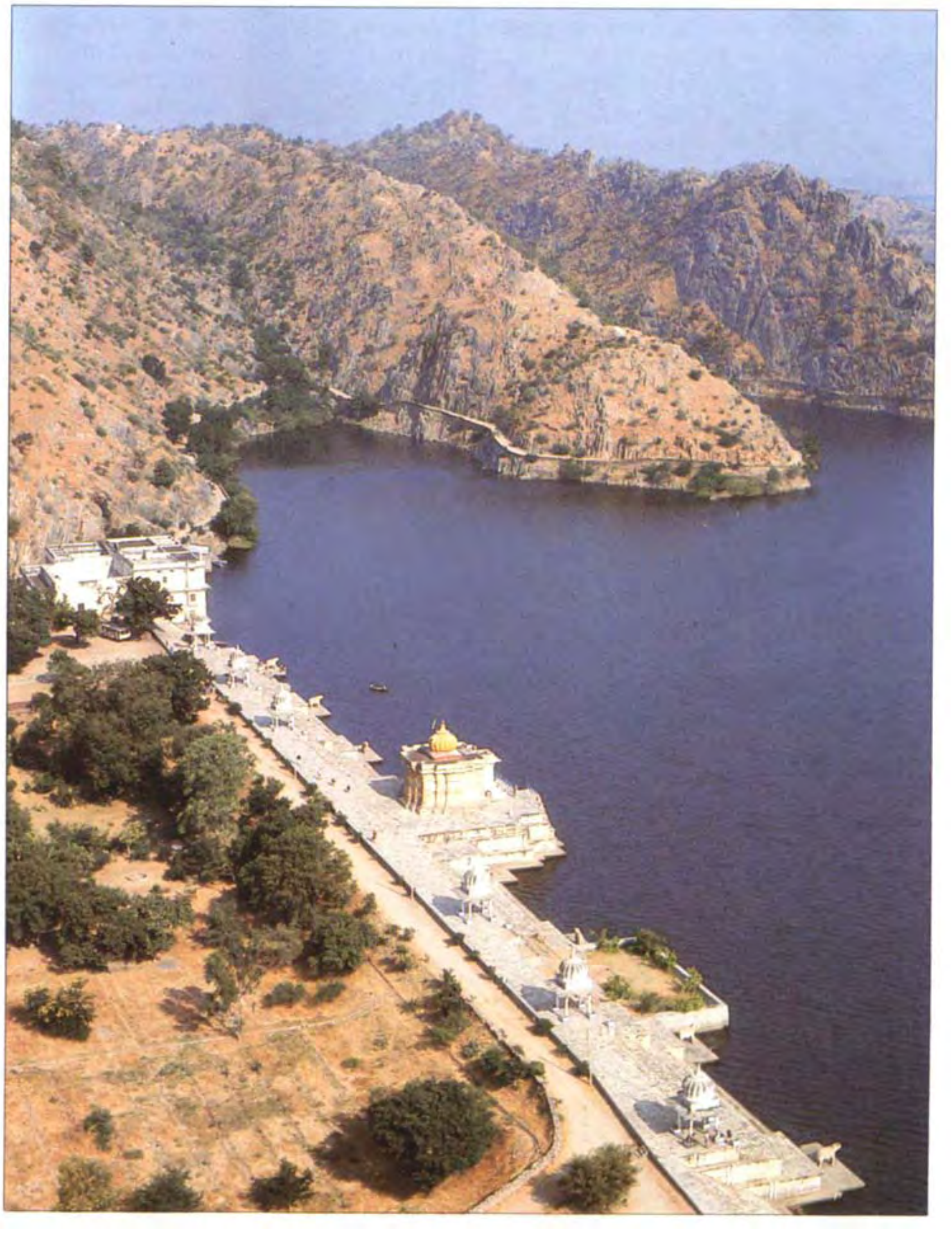
6.3.58 Overall the circuit would continue with its appeal to the domestic tourists from Gujarat. The circuit offers medium potential for growth, which would mainly come from new unexplored locations like Jaisamand and Jagat. Given its topography, water resources, tribal habitation, forests and wildlife, the Mewar region has the necessary assets to be developed as the eco-tourism region. In the longer term, Udaipur would face constraints of carrying capacity because of its peculiar geography and ecological sensitivity.



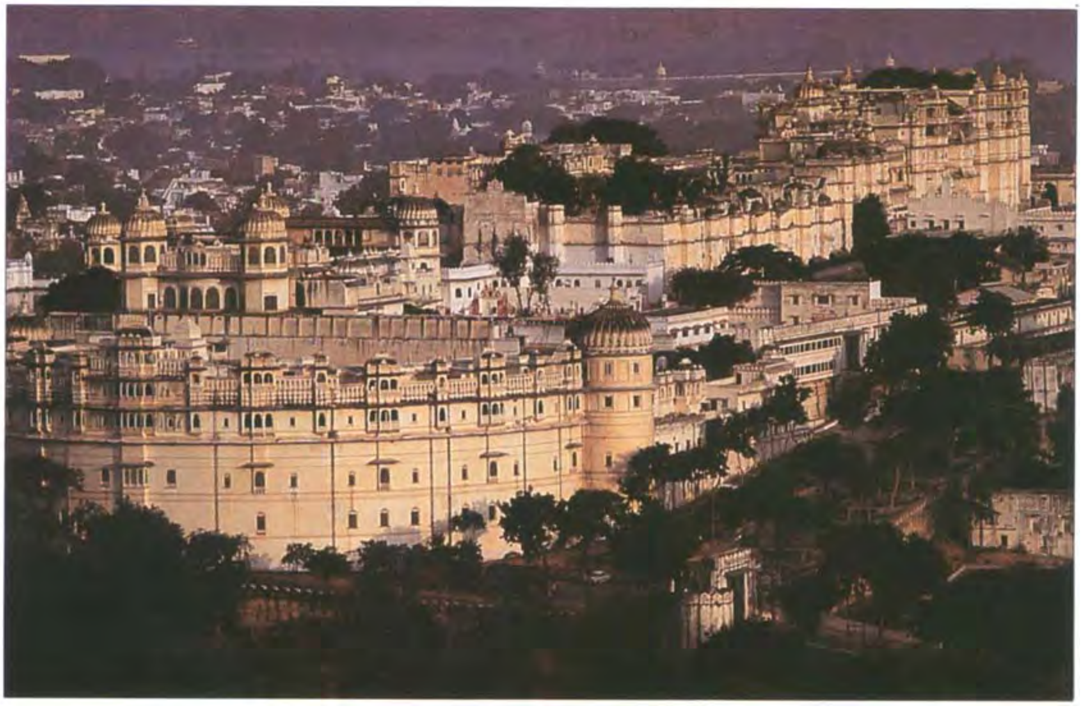
Chittaurgarh Fort - A must see for tourists visiting Udaipur

Kumbhalgarh Fort - Birthplace of Maharana Pratap

Lake Palace - Udaipur



Lake Jaisamand Waterfront - Offers a scope to be developed into a tourist complex having water resort, amusement park, bird park, water sports



City Palace, Udaipur

6.3.59 Based on this assessment the forecast growth rates for the major locations within the Mewar circuit are as given below in Exhibit 6.28

Exhibit 6.28

Mewar Circuit – Forecast Growth Rates in Tourist Arrivals

Location	Tourist category	Short Term	Medium Term	Long Term
Udaipur	Domestic	1%	1%	2%
	Foreign	10%	4%	6%
Nathdwara	Domestic	9%	4%	3%
	Foreign	-7%	4%	6%
Chittaurgarh	Domestic	7%	1%	2%
	Foreign	7%	4%	6%
Rikhabdeo	Domestic	23%	4%	3%
	Foreign	-4%	2%	4%

Note: Short term growth rates are based on 'average' tourist arrival figures from 1997-2001. This has been done to discount the irregularities in tourist arrivals in the year 2001.

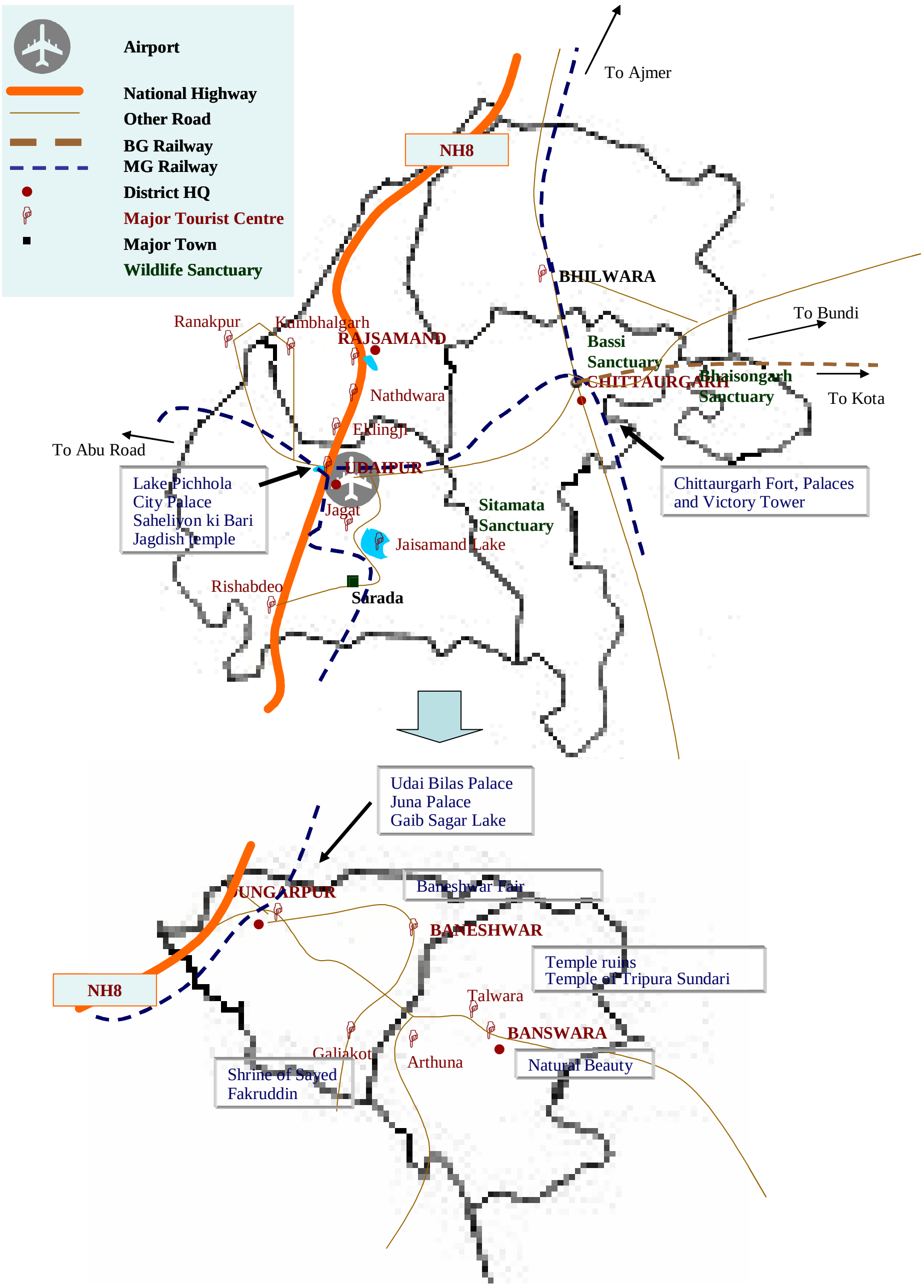
6.4 VAGAD CIRCUIT

Overview of the Circuit

6.4.1 Vagad region has a varied topography that encompasses wild and rugged terrain in the northeast to fertile plains of alluvial soil in the southwest. The circuit offers a combination of tribal culture, religion and history and is particularly popular amongst the domestic tourist. This circuit primarily includes Dungarpur and Banswara. Exhibit 6.29 provides a map of the Mewar circuit showing the main tourist locations in the circuit.

Exhibit 6.29

Tourist Map of Vagad Circuit



Geography and Topography

6.4.2 Vagad area lies to the south of the Mewar Circuit bordering Gujarat. The climate in this area is hot during the summer months of April to June. The winters are mild and pleasant and hence the peak tourist season is from September to March. The area is a mixture of plains and hills and has large tracks of land covered by forests. With a large number of sanctuaries and lakes in the area. The region consists of the two districts of Dungarpur and Banswara separated by the Mahi river. In general, the Vagad region is the tribal belt of Rajasthan. Banswara with a population of 86,000 is the largest city in the circuit.

Travel links

6.4.3 Udaipur's Dabhok airport (located around 24 Kms East of the city) is the closest airport to the Vagad region. Udaipur Airport is 130 Kms from Dungarpur and 190 Kms from Banswara. Udaipur is connected to Delhi and Mumbai (outside the state) and Jaipur and Jodhpur through daily flights. Ahmedabad Airport is around 175 Kms from Dungarpur and 310 Kms from Banswara. Ahmedabad is connected to Delhi, Mumbai, Bangalore and Kolkata through daily flights and also has international flights connecting it to Dubai.

6.4.4 Dungarpur is connected by rail to Delhi and Ahmedabad (via a metre gauge network). The nearest railhead for Banswara is Ratlam in Madhya Pradesh at a distance of 80 Kms. Chittaurgarh is the closest station with broad gauge connectivity to the rest of the country via a Chittaurgarh–Kota broad gauge line. Chittaurgarh is 230 Kms from Dungarpur and 200 Kms from Banswara.

6.4.5 Dungarpur lies at a distance of 21 Kms from National highway NH8 passing through Udaipur, Ahmedabad and Jaipur and many important tourist locations are on/ off NH8 itself. Banswara has good connectivity from Ratlam. The Sirohi-Ratlam State highway cuts through both the districts in the Vagad region. Other tourist locations in the state are connected by State Highway or district roads.

<u>Major Tourist Spots and Attractions</u>

6.4.6 Exhibit 6.30 indicates the major tourist locations in the Vagad circuit. Although, there are a large number of tourist spots in the Vagad area, the most popular are the Dungarpur and Banswara.

<u>Exhibit 6.30</u>

<u>Major Tourist Locations in Vagad Region</u>

District	Major Attractions	Major Excursions	Major Events
Dungarpur	<u>Dungarpur</u> (1) Udai Bilas Palace (2) Juna Mahal Palace (3) Gaib Sagar Lake (4) Government Museum	<u>Ex-Dungarpur</u> (1) Beneshwar Temple (60 Kms) (2) Deo Somnath Temple (24 Kms) (3) Galiyakot (Sufi shrine) (58 Kms) (4) Baroda (temples) (41 Kms) (5) Bhuvaneshwar (temple) (9 Kms) (6) Poonjpur (temple) (37 Kms)	Beneshwar Fair (February-March) Bar Bij Fair (October-November)
Banswara	<u>Banswara</u> (1) Anand Sagar Lake (2) Dialab Lake (3) Abdullah Pir Shrine (4) Madareshwar Temple	(1) Mahi Dam (18 Kms) (2) Arthuna (temple ruins) (55 Kms) (3) Talwara (ruins) (15 Kms) (4) Tripura Sundari (temples) (19 Kms) (5) Parahera (Temple) (22 Kms) (6) Chinch (Temple) (18 Kms)	

Main Tourist Locations and Attractions

6.4.7 Some salient observations with respect to the main tourist and the type of tourists they direct are as follows:

- **Dungarpur**: Dungarpur is famous for its unique architectural style, which is reflected in the Udai Bilas Palace and Juna Palace. Another interesting place to visit is the famous shrine dedicated to Shrinathji on the banks of the Gaib Sagar Lake. Tourists also visit Dungarpur to see the large variety of migratory birds that frequent the water bodies at Dungarpur during winters.
- **Banswara**: Banswara is known for its scenic beauty, especially the Mahi Bajaj Sagar Dam. Mahi river has number of islands inside and thus Banswara is also known as 'City of Hundred Islands". Others places worth visit in the town are Anand Sagar Lake, Dialab Lake, Madareshwar and the shrine of Abdulla Pir.
- **Baneshwar**: Baneshwar, which lies 60 Kms east of Dungarpur at the confluence of the Som and Mahi rivers, is famous for its Shiva Temple. This temple is much revered by the Bhils (tribals) and the annual fair (held in February-March) attracts hordes of tribals from the Rajasthan and the adjoining states of Gujarat and Madhya Pradesh.
- **Arthuna**: Arthuna lies at a distance of 55 Kms from Banswara. Arthuna is famous for its ruins of the Hindu and Jain temples dating back to the 11th, 12th and 15th centuries.

Less Frequented Tourist Locations

6.4.8 Other places of tourist interest in the Vagad region and are relatively less frequented/ underdeveloped are as follows :

- **Deo Somnath**: Around 24 Kms from Dungarpur on the banks of Som river is the 12th century Shiva temple. It essentially attracts pilgrim traffic
- **Galiyakot**: Located around 58 Kms from Dungarpur, Galiyakot is known for the Shrine of Syed Fakhruddin, much revered by the Dawoodi Bohra community. The annual Urs in the Muslim month of Moharram attracts a large number of devotees from the community
- **Talwara**: Talwara (15 Kms from Banswara) is of historical importance because of its ancient temples and the ruins of some old monuments.
- Apart from the above there are several places that are of interest to the domestic tourist such as **Tripura Sundari** (19 Kms from Banswara), **Parahera** (22 Kms from Banswara), **Chinch** (18 Kms from Banswara), **Baroda** (41 Kms from Dungarpur), **Bhuvaneshwar** (9 Kms from Dungarpur) and **Poonjpur** (37 Kms from Dungarpur).

<u>Existing Tourist Traffic Trends</u>

6.4.9 The major tourist locations in the Vagad Circuit include Dungarpur and Banswara. Tourist statistics in the circuit are available only for Banswara. In 2001, Banswara recorded 1.2 Lakh tourists, mostly domestic.

6.4.10 Tourist traffic and past growth trends for Banswara in the Vagad region is provided in Exhibit 6.31. The salient observations are provided in the subsequent paragraphs.

Exhibit 6.31

Tourist Arrivals in Vagad Region

Tourist Location	Category of Tourist	1996	1997	1998	1999	2000	2001	CAGR	Comments
Banswara	Indian	76101	76200	96137	111872	109053	115101	9%	Still unexplored except during the annual Beneshwar Fair
	Foreign	260	256	306	338	263	273	1%	
	Total	76361	76456	96443	112210	109316	115374	9%	

Source: DoT, Rajasthan

Tourist Traffic

- Growth in domestic tourist traffic has been over 9% in Banswara, mainly riding on the popularity of the Baneshwar Fair.
- Very few foreign tourists travel to Banswara.

Connectivity Infrastructure

6.4.11 Travel links of various spots in the Vagad region are shown in Exhibit 6.32.

Exhibit 6.32

Travel Connections of Towns within the Vagad Region

Sr. No.	Towns	Connectivity	Comments
1	Dungarpur	Road (NH8), Rail (Meter Gauge)	On the Ahmedabad – Udaipur rail and road link
2	Banswara	Road (SH)	Good road connectivity with Ujjain and Ratlam in Madhya Pradesh
3	Baneshwar	Road (SH)	Good connectivity from Dungarpur

Air

6.4.12 There is no airport in the Vagad region. Udaipur's Dabhok airport (located 130 Kms from Dungarpur and 190 Kms from Banswara) is the most convenient airport for the tourists visiting the region alongwith the Mewar region. It has flights connecting it to Mumbai and Delhi (outside the state) and Jaipur and Jodhpur (within Rajasthan). Ahmedabad airport, which is at a distance of 175, Kms is also closer to Dungarpur.

6.4.13 Currently there are 6 flights landing into to Udaipur. There are 3 daily direct services from/ to Mumbai (both direct) and 3 services from/ to Delhi (one direct and two hopping via Jaipur/Jodhpur). Additionally, there are 2 services to Jaipur (one hopping via Jodhpur) and one service to Jodhpur.

6.4.14 With only 6 incoming flights per day at present, the airport capacity is sufficient to meet future needs. However, the current runaway at Dabhok can only handle smaller aircraft (737-200 and A37 type aircraft). Thus there is a need to extend the runaway to handle bigger aircraft over the medium/ long term.

6.4.15 In the longer-term helipads/ airstrips can be developed at Dungarpur. There is also a need to improve air services to/from Udaipur and other locations in India :

- Delhi: 2 of the 3 flights are hopping fights. There is a need for more direct flights to Udaipur for Delhi.
- Kolkata: Tourists from Kolkata have to take a connecting flight from Delhi

- Chennai: Would bring Udaipur closer to international travelers arriving from the South and East Asian countries

Rail

6.4.16 Dungarpur is connected by rail to Ahmedabad and Delhi through a meter gauge network, which limits the region's direct rail connectivity to the broad gauge network of the rest of the country. The closest broad gauge connection is Chittaurgarh (on the eastern edge of the Mewar region) which is 230 Kms from Dungarpur and 200 Kms from Banswara.

6.4.17 There are two trains daily between Udaipur and Delhi (via Chittaurgarh) and one train daily between Udaipur and Ahmedabad. Additionally, there is one train daily from Jaipur, Ajmer, Khandwa and Indore stopping at Chittaurgarh.

6.4.18 Though Udaipur has a rail connection to Chittaurgarh this is a slow meter gauge line, which prevents running of faster trains. Most of the track is also single lane, which causes considerable delay in travelling. However, for shorter circuits the road route is preferred so as to enable sightseeing enroute. However, with the broad gauging work of the Udaipur–Chittaurgarh line underway, connectivity of Vagad with other main cities is expected to improve substantially.

6.4.19 There is a need to convert the existing metre gauge network to broad gauge on the Udaipur-Himatnagar–Ahmedabad route. This will offer broad gauge connection to Ahmedabad and Mumbai. It will help in tourist development of Jaisamand, Dungarpur, Banswara and the entire southern Mewar region

Road

6.4.20 Dungarpur lies at a distance of 21 Kms from NH8 (Delhi-Ahmedabad highway) and is well connected to important tourist and commercial centres such as Jaipur, Delhi and Ahmedabad (which are also on NH8). Other tourist spots and places on the Vagad circuit are essentially connected to Dungarpur only by road.

6.4.21 Banswara is best approached from Ratlam. The Sirohi-Ratlam state highway cuts through both the districts in the Vagad region. Other tourist locations in the state are connected by state highway or district roads.

<u>On-going and proposed Projects</u>

6.4.22 The most common route taken by tourists from Mumbai is the Ajanta-Mandu–Banswara. Mandu is a famous hill-station in Madhya Pradesh. However, the road stretch between Mandu and Banswara, a large part of which passes through Madhya Pradesh is poor thereby restricting the accessibility of tourist locations in the Banswara district.

6.4.23 National highway (NH8), which connects Delhi to Bombay via Jaipur, Ajmer, Udaipur and Ahmedabad is being widened and converted into 4 lanes under the Golden Quadrilateral project of NHAI.

6.4.24 Appendix 6A provides the list of proposed road construction and maintenance projects for tourist locations in the Vagad Circuit

6.4.25 The roads within the Vagad circuit which need to be prioritised for carrying repairs are listed below:

- Bhantara Darwaza–Udai Bilas Palace (1.5 Kms)

Tourism Related Direct Infrastructure

6.4.26 The Vagad circuit, has relatively underdeveloped direct tourism infrastructure in terms of connectivity, accommodation, tourist information services, etc.

Accommodation

6.4.27 Accommodation facilities in the Vagad area is restricted to mid-range for the domestic tourists to a lone Heritage hotel in Dungarpur that caters to the foreign tourist. Government accommodation in circuit houses and PWD resthouses and budget hotels are available in abundance. Udaipur City, which is the tourism hub for the Vagad region, offers several accommodation options for tourists undertaking day excursions to the region. The average length of stay of the domestic tourists in Dungarpur/ Banswara is one day. Very few foreign tourists stay in Banswara.

6.4.28 Exhibit 6.33 provides on overview of hotel accommodation in the Vagad circuit. As seen from the Exhibit, the Vagad Circuit has a capacity of approx. 417 rooms (approx. 1050 beds). Almost the entire bed capacity is concentrated in Banswara and Dungarpur.

Exhibit 6.33

Accommodation in Mewar Tourism Circuit – Current Status

Sr. No.	District	Location	No. of Units	No. of Rooms	No. of Beds	Of which RTDC bed capacity
1	Dungarpur	Dungarpur	8	157	314	RTDC Motel Ratanpur (10)
2	Banswara	Banswara	10	260	732	
		Total	**15**	**417**	**1046**	**10**

Source: DoT, Rajasthan

Note: *1. No. of hotels includes unregistered hotels*
2. Figures in brackets indicate beds and rooms in Dharamshalas.

6.4.29 The current status of the accommodation facilities available at each of these locations is discussed below.

- Dungarpur has a heritage hotel (Udai Bilas Palace) with 17 rooms catering essentially to up-market/ foreign tourists. However, Banswara has 8 economy category ‘dormitory type’ hotels with around 260 rooms (732 beds) mainly catering to the religious tourists arriving in the region.
- Government accommodation in the region includes the Mahi Rest House and other irrigation department bungalows at sites of dams and canals. Circuit houses and PWD resthouses, both in Dungarpur and Banswara, provide good accommodation facilities, which are preferred by domestic tourists.

6.4.30 Foreign tourists avoid staying at Vagad region due to lack of decent accommodation facilities in the region. As a result, they usually undertake day excursions from Udaipur. However, given the growing interest in wilderness related tourist activities of foreign tourists there appears to be a need for an up-market hotel in the area.

6.4.31 The success of the Island Resort at Jaisamand suggests that such facility can be replicated in the backwaters of the Mahi Bajaj Sagar Dam. Dungarpur offers a scope for resorts/ mid-priced hotels for the weekend tourists travelling from neighbouring Gujarat.

<u>On-going Hotel Projects</u>

6.4.32 There are no major hotel projects proposed in the Vagad region. A lone hotel project has been approved by DoT at Bicchiwada in Dungarpur district (details provided in Appendix 6B).

Wayside Facilities

6.4.33 Presently there are no RTDC Midways / Wayside facilities on any tourist relevant routes in the Vagad circuit.

<u>Wayside Facility Gaps</u>

6.4.34 There is a potential to start a wayside facility at Khairwara on the Udaipur–Dungarpur route (21 Kms from Dungarpur) and at Bicchiwada on the Ahmedabad-Dungarpur route (21 Kms from Dungarpur), which presently has a substantial tourist traffic movement. Another midway facility could be located near Danpur on the Ratlam-Banswara route.

<u>New Projects: Wayside facilities</u>

6.4.35 The future requirements for wayside facilities are as follows:

- On the Udaipur-Dungarpur route at Khairwara (on NH8)
- On the Ahmedabad-Dungarpur route at Bicchiwada (on NH8)
- On the Ratlam-Banswara route at Danpur

Tourist Offices

6.4.36 RTDC has tourist offices and kiosks at Banswara and Dungarpur as indicated in Exhibit 6.34.

<u>Exhibit 6.34</u>

<u>Tourist Offices in Vagad Region</u>

Sr. No	District	TRC / TIB
1	Banswara	TIB, Banswara
2	Dungarpur	TIB, Dungarpur

<u>Tourist Offices Gaps</u>

6.4.37 For tourists travelling on road from Gujarat and Madhya Pradesh, there is a need for a Tourist Information kiosks on the Gujarat–Rajasthan and Gujarat-Madhya Pradesh border. This office could be located at Ratanpur (Gujarat border) and Danpur (Madhya Pradesh border).

Development of Tourist Spots/ Tourist Site Enhancement

6.4.38 The 16^{th} century city palace of Banswara, covers a large area and is typical example of old Rajput architecture. The palace is owned by the royal family and is still one of better maintained heritage architecture in the region. However the palace can be visited on invitation only. Efforts could be made to convert parts of the palace into museum and thrown open to the public.

6.4.39 It is estimated that close to 10 Lakh pilgrims (mainly tribals) visit the Baneshwar during the 7-day fair. The Baneshwar fair has, in the recent years, started attracting foreign tourists. Presently there are very few accommodation options available for the tourist resulting into only day visitation. The Fort Dhariyawad heritage hotel arranges for tented accommodation during the Baneshwar Fair. RTDC in association with other heritage hotels in the region (Vagad and Mewar) can promote the fair by arranging for more tents during the fair thereby providing the tourist with an option for an overnight halt.

6.4.40 Apart from the annual Baneshwar fair, the weekly 'haats' also attract the tribal population from the neighbourhood forests. These weekly haats are also colourful affairs and can be institutionalised and promoted as a Tribal Cultural Centre. A Tribal Cultural Centre would be an interactive institution that would portray the tribal lifestyle and rituals, artforms and handicrafts to the visiting tourist.

6.4.41 Centres like Kali Kalyani Dham, Padoli Rathore, Swami Narayan Gurukul, Ravindra Dhyan Ashram and Param Anand Ashram in Banswara district can be promoted for meditation and yoga activities.

Ongoing Projects

6.4.42 Exhibit 6.35 provides the list of developmental works being carried out in the Vagad circuit under various state and central Government plans.

Exhibit 6.35

Developmental works in the Vagad Circuit

District	Name of the Project	State/ CSS	Total Cost (Rs. Lakhs)	Executing Agency	Status
Banswara	Conservation of Arthuna Temple, Dungarpur	CSS	20.00	A & M	Proposed
Dungarpur	Conservation of Dev Somnath, Dungarpur	CSS	10.00	A & M	Proposed

CSS:Centrally Sponsored Schemes

Source: DoT, Rajasthan

6.4.43 Apart from these ongoing and identified projects, there is a scope for a new resort project in the backwaters of the Mahi Bajaj Sagar dam in Banswara

Sanctuaries

6.4.44 Although a thickly forested area, there are no wildlife sanctuaries in Vagad circuit. The native birds commonly seen in the Vagad region are partridges, peafowls, rock pigeon, green pigeon, quails, cuckoo and parrots. Migratory birds such as goose, ducks, snipes, cuckoo, weaver birds and cranes are regular visitors to the area during winters. There is a case for declaring the areas of Palisoda and Katara as wildlife sanctuaries that can be further marketed as tourist destinations.

Tourism Products

6.4.45 The tourism products present in the circuit include primarily religious tourism and heritage tourism to a limited extent. There is virtual absence of nature and leisure tourism in the region. Some tourism products such as Palace on Waves, canal safari, water parks, etc. have been identified for the region.

6.4.46 The region also has scope/ potential to develop various new products such as, water resort/ water park at Mahi Bajaj Sagar Dam, canal safaris in Mahi Dam canals at Banswara and boating facilities at Dungarpur.

Summary of Infrastructure in Vagad Circuit

6.4.47 Exhibit 6.36 provides a summary of tourism relevant infrastructure in the Vagad circuit.

Exhibit 6.36

Tourism Relevant Infrastructure in Vagad Circuit

Category	Current Status	Potential for Development		
		Short Term	Medium Term	Long Term
Connectivity Infrastructure	Adequate	✓	✓	✓
		In line with traffic growth		
Accommodation	Not developed	✓	✓	✓
		In line with traffic growth		
Midway/ Wayside Facilities	Lacking	✓	✓	
Tourist Offices	Adequate (scope for more)		✓	
Others (Recreational Facilities, Shopping Facilities, etc)	Not developed	✓		
Monuments/ Site Enhancement	Fairly developed	✓		
Sanctuaries/ Eco-Tourism	Not applicable			
Tourism Products (Rural Tourism, Resort Tourism, Health Tourism, etc)	Not developed	✓	✓	✓

Evaluation of Potential for Tourism Growth and Traffic Forecast Assumptions

6.4.48 The evaluation of the Vagad circuit from the viewpoint of potential for tourism growth in the future is based on various factors as outlined in Exhibit 6.37.

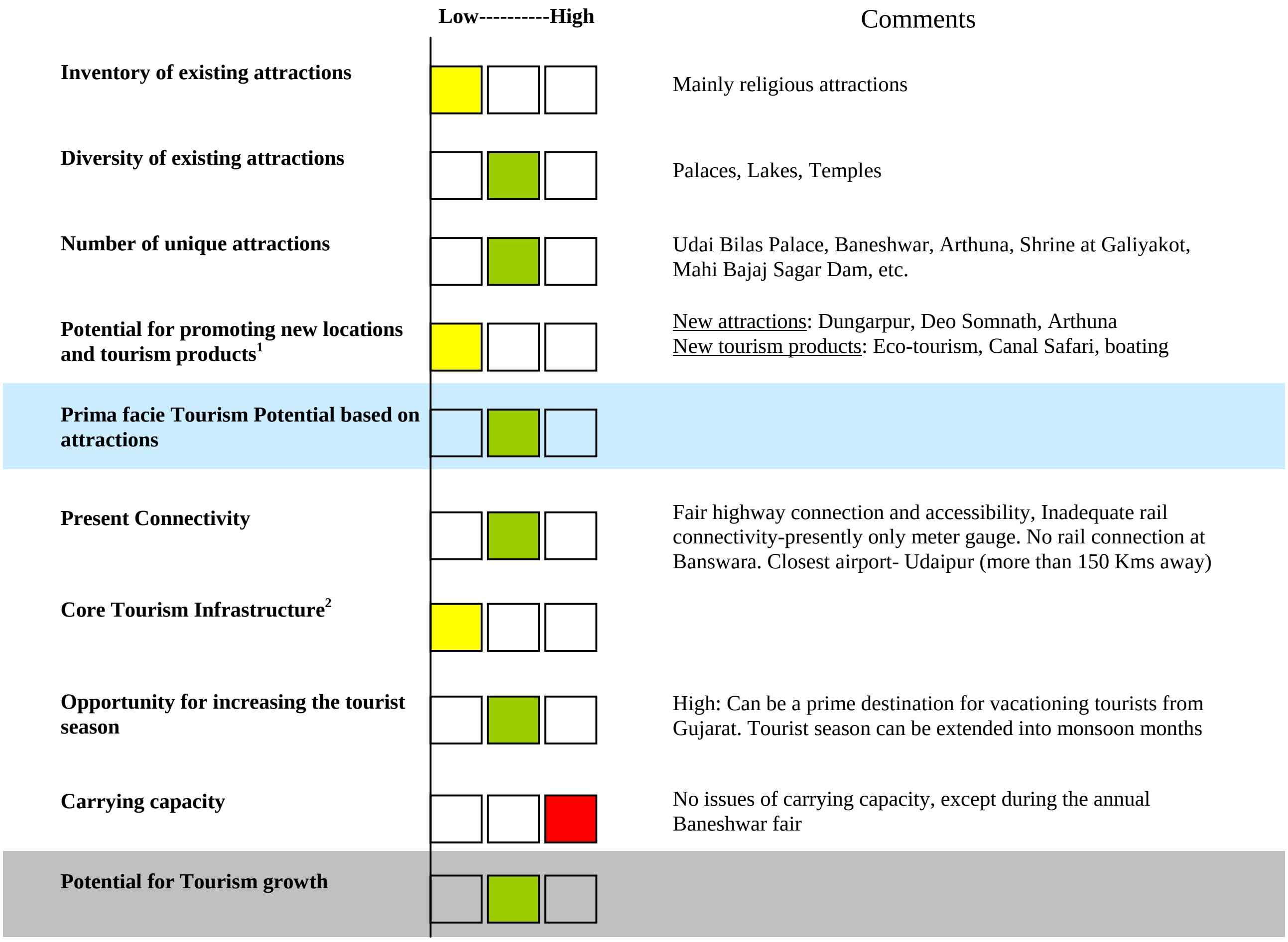
6.4.49 The Vagad circuit is amongst the least popular circuit amongst the tourists coming to Rajasthan. The circuit, essentiatialy consisting of Dungarpur and Banswara, offers the tourist a limited diversity of attractions but has some of the unique attractions like the Udai Bilas Palace, Arthuna and several important religious sites. However, basic tourist activity only exists in Dungarpur. Other places in the region are more of pilgrimage places than tourist places.

6.4.50 The region is very popular for its Baneshwar Fair and attracts large number of pilgrims from the neighbouring Gujarat and Madhya Pradesh. Most tourist locations within the circuit are well connected by a road network. However, rail connectivity from different parts of the country to the Vagad circuit is a constraining factor. It is still dependent on the Mewar circuit (especially Udaipur) to attract tourists. It would take some time for the circuit to evolve as an independent tourist destination.

6.4.51 Overall the circuit offers a medium potential for growth, given is poor tourist infrastructure. However with its relatively unexplored locations like Dungarpur, Arthuna and Deo Somnath, the circuit can be taken up for focussed development. Its carrying capacity would emerge as Vagad's prime asset for all around development. Given its topography, water resources, tribal habitation, forests and wildlife, the Vagad region has the necessary assets to be developed as the eco-tourism region.

Exhibit 6.37

Vagad Circuit: Evaluation of Potential for Tourism Growth



6.4.52 Based on this assessment the forecast growth rates for Banswara within the Vagad circuit are as given below in Exhibit 6.38

Exhibit 6.38

Vagad Circuit – Forecast Growth Rates in Tourist Arrivals

Location	Tourist category	Short Term	Medium Term	Long Term
Banswara	Domestic	5%	6%	8%
	Foreign	4%	2%	4%

Note: Short-term growth rates are based on 'average' tourist arrival figures from 1997-2001. This has been done to discount the irregularities in tourist arrivals in the year 2001.

6.5 DHUNDHAR CIRCUIT

Overview of the Circuit

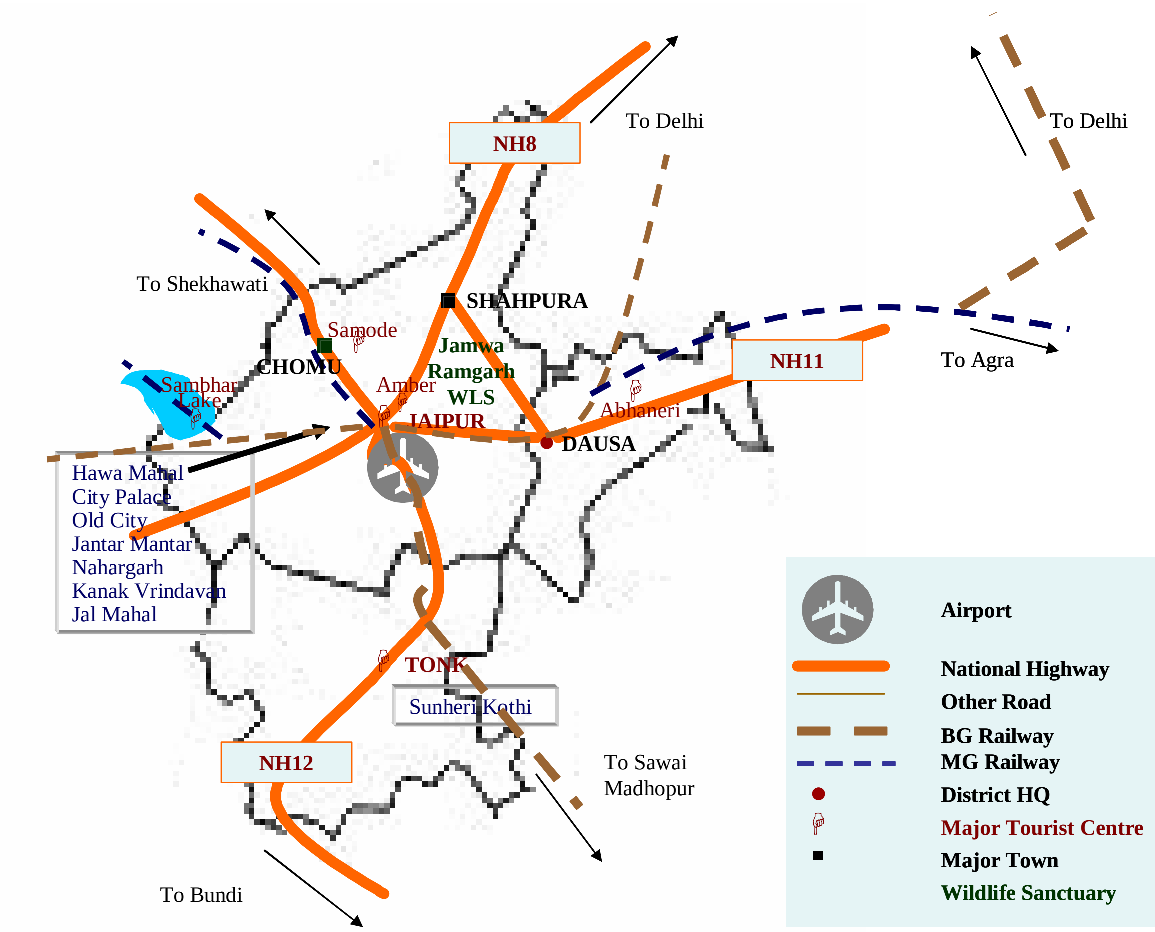
Background

6.5.1 The Dhundhar circuit constitutes of tourist locations around Jaipur and is known for its blend of culture, history, architecture and religion. It includes tourist locations in Jaipur, Dausa and Tonk districts, mainly the Jaipur City and others like Samode, Abhaneri and Ramgarh. Jaipur the capital city of Rajasthan, is the hub for this circuit. Other locations in the circuit are usually covered by taking daily excursions from Jaipur.

6.5.2 A map of the Dhundhar tourism circuit is provided in Exhibit 6.39

Exhibit 6.39

Map of the Dhundhar Tourism Circuit



Geography and Topography

6.5.3 The Dhundhar circuit lies in the central part of the state between the northern Aravalli range and close to the Sambhar Basin. The climate in the region is extremely hot during the peak summer months of April–June. As a result, the tourist season extends from

September to March. The region gets an annual rainfall of around 640 mm, most of it in the monsoon months of June to September.

Travel links

6.5.4 Being the capital of Rajasthan and an important tourist location, Jaipur is well connected by air, rail and road to the rest of the country. Jaipur is one of the main tourist entry points for Rajasthan. It is, particularly, the entry point for foreign tourists coming into the state. Presently, the city has a domestic airport, which is being upgraded to an International airport. Domestic flights connect Jaipur to Jodhpur and Udaipur within the state and to Delhi, Mumbai, Kolkata and Ahmedabad. An international flight to Middle East (Dubai) has been operational since February 2002.

6.5.5 Jaipur is also well connected to the major cities in the state as well as in the country through rail and road. Jaipur falls on the main rail trunk line between Delhi and Ahmedabad and is also well connected to major cities in the state such as Ajmer, Jodhpur, Bikaner, Jaisalmer, Kota, and others by rail.

6.5.6 Jaipur is also on the NH8 and NH11, and has good road connectivity to all major cities in the state. After the completion of the National Highway Authority of India's Golden Quadrilateral project, Jaipur would be an overnight journey from Ahmedabad and most parts of Northern India.

Major Tourist Spots and Attractions

6.5.7 Dhundhar region has a large inventory of attractions, which are diverse as well as unique. Hence the region is popular amongst domestic as well as foreign tourists. The main attractions in the region are given in Exhibit 6.40

Exhibit 6.40

Major Tourist Locations in Dhundhar Circuit

District	Major Attractions	Major Day-excursions	Major Events
Jaipur	Jaipur (1) The City Palace (2) Jantar Mantar Observatory (3) Hawa Mahal Palace (4) Govind Devji Temple (5) Galtaji Pilgrim Centre (6) Moti Doongri, Lakshmi Narayan Temple (7) Statue Circle (8) Ram Niwas Gardens with Zoo (9) BM Birla Planetarium (10) Old City Others (1) Maharani ki Chhatri Cenotaphs (2) Jal Mahal Palace (3) Kanak Vrindavan Temple Complex (4) Gaitore Cenotaphs (5) Ghat ki Guni gardens (Sisodia Rani gardens) (6) Amer fort (Sheesh Mahal and other palaces) (7) Jaigarh fort (8) Nahargarh fort (9) Sanganer palaces and temples	(1) Bagru Fort (35 Kms)- on Ajmer Road (2) Ramgarh Lake, temples and fort ruins (32 Kms NE) (3) Samode Haveli and Bagh (40 Kms NW) (4) Bairath ruins (86 Kms on Shahpura-Alwar road) (5) Abhaneri well and temple (128 Kms NE off Agra road) (6) Sambhar Lake – (94 Kms W) (7) Madhogarh Tunga (40 Kms on Bassi-Lalsot Agra road)	Gangaur Festival (March-April) Elephant Festival (March) Teej (July-August)

District	Major Attractions	Major Day-excursions	Major Events
Dausa	Abhaneri		
Tonk	Tonk Sunheri Kothi		

Main Tourist Locations and Attractions

6.5.8 Although termed as the Dhundhar circuit, the circuit is mainly concentrated at Jaipur. As seen in the Exhibit, the Dhundhar circuit has a large inventory of attractions covering history, religion, culture and leisure. Jaipur also offers other products such as convention facilities, health centres, etc. Jaipur has some unique attractions such as the Hawa Mahal, the Jantar Mantar Observatory, etc.

6.5.9 Other places in the circuit are within a radius of 80 Kms from Jaipur. Most tourists stay in Jaipur and visit other places in the circuit taking day excursions. Thus, the Dhundhar circuit is usually completed within 2 days from Jaipur.

Less Frequented Tourist Locations

6.5.10 There are places in the Dhundhar region that have some interesting tourist attractions but largely remain unexplored by the tourists. These include the step-well at Abhaneri, the Sunheri Kothi at Tonk, the ruins at Viratnagar, Ramgarh Lake, Sambhar Lake and Sanganer. Of these, Abhaneri well, Sunheri Kothi, Viratnagar ruins, Ramgarh and Sambhar Lake are unique and as such offer good tourism potential. They have the potential to be developed as 'satellite' tourist destinations for Jaipur.

Existing Tourist Traffic Trends

6.5.11 Jaipur being the only location in the Dhundhar circuit, most tourists prefer staying at Jaipur. Effectively, the trends in tourist arrivals at Jaipur reflect upon the popularity of the circuit to an extent. Exhibit 6.41 gives the tourist traffic trends for Jaipur.

Exhibit 6.41

Tourist Arrivals in the Dhundhar Region

Tourist Location	Category of Tourist	1996	1997	1998	1999	2000	2001	CAGR	Comments
Jaipur	Domestic	659694	700358	616315	613511	745476	655715	0%	• State Capital • Standalone destination for large number of tourists • Proximity to Delhi • Part of Golden Triangle • Good overall connectivity
	Foreign	82610	184112	150971	129955	154756	172950	16%	
	Total	742304	884470	767286	743466	900232	828665	2%	

Domestic Tourist Traffic

- Jaipur is the 4th most popular tourist location in Rajasthan.
- Domestic tourist arrivals in Jaipur have plateaued recently with minor yearly variations in the arrival figures.

Foreign Tourist Traffic

- Jaipur's appeal is very strong with the foreign tourist. The arrivals here have shown a marked increase in the last few years, inspite of various events that have dampened the general tourist activity in the country as well as the region. In terms of foreign tourist arrivals, Jaipur ranks 1st in the state

- Several factors contribute to popularity of Jaipur amongst the foreign tourists. Apart from the diversity and uniqueness of its attractions, Jaipur also has excellent direct tourism infrastructure in the state.

Connectivity Infrastructure

Air

6.5.12 Presently, Jaipur airport handles 12 flights in a week, of which 9 are daily flights. Jaipur has direct connectivity with Mumbai, Delhi, Kolkata, Jodhpur and Ahmedabad and handles a total of 3 Lakhs passengers per annum. Flight services to Dubai have also commenced since February 2002.

6.5.13 The current and planned facilities at the Jaipur airport will be sufficient to meet the growing traffic demands in the future.

6.5.14 There is a need for direct flight from one of the cities in South India. A direct flight to either Bangalore or Chennai is desired to fly international tourists disembarking at these locations into Rajasthan.

6.5.15 The Jaipur airport is being upgraded to an international airport, and is expected to receive Rajasthan destined tourist directly in the future. With the upgradation of the airport, there would be further scope for international charter flights to land into Jaipur directly.

Rail

6.5.16 Jaipur is well connected by rail to various cities across India and Rajasthan and has both broad gauge and meter gauge connectivity. Jaipur falls on the important Mumbai-Delhi trunk line (via Ahmedabad). There are daily services to/ from Delhi, Ahmedabad, Kolkata and Mumbai. There are three services in a week between Jaipur and Chennai and two between Jaipur and Bangalore, Jaipur and Indore.

6.5.17 In terms of local travel, Jaipur also has good service to/ from major tourist cities in Rajasthan. There are daily train services to Jodhpur, Bikaner, Shekhawati, Sawai Madhopur, Ajmer, Abu Road, Kota and Udaipur, thus linking the important cities in most circuits in the state of Jaipur.

6.5.18 Jaisalmer is becoming increasingly popular with both domestic and foreign tourists. More services connecting Jaipur and Jaisalmer are desired in the future.

Road

6.5.19 Road connectivity is important for intra circuit travel, particularly in the case of Dhundhar circuit, which has a ‘hub and spoke’ structure with Jaipur serving as the hub. Jaipur falls on the NH8 (Delhi-Jaipur-Ahmedabad-Mumbai) which would be widened to 4 lanes under the NHAI’s Golden Quadrilateral connecting the four metro cities of India together. NH11 (Bikaner-Jaipur-Agra) and NH12 (Jaipur-Tonk) also pass through Jaipur.

6.5.20 Road connectivity within the circuit needs to be improved to enable smooth passage of tourists in the region. A ring road around Jaipur is extremely necessary to save the tourist the trouble of passing through the city everytime.

Ongoing/ Proposed Projects

6.5.21 A list of on-going/ proposed projects in the region is given in Appendix 6A. The roads within the Dhundhar circuit, which need to be prioritised for carrying repairs are listed below:

- Sikandra (NH11) to Abhaneri – 7 Kms
- Tonk-Sawai Madhopur –77 Kms

6.5.22 Sawai Madhopur is emerging as one of the major attractions in Rajasthan. As mentioned earlier Sawai-Madhopur is mostly approached from Jaipur side. The road connecting Jaipur to Sawai-Madhopur needs to be suitably upgraded to handle the future tourist movement.

Tourism Related Direct Infrastructure

Accommodation

6.5.23 The tourist stay in the region is presently concentrated in Jaipur. The average length of stay in the city for a foreign tourist is 1.5 days, whereas that for a domestic tourist is around 2 days. Exhibit 6.42 provides an overview of hotel accommodation in the Dhundhar circuit region.

Exhibit 6.42

Accommodation in Dhundhar Tourism Circuit- Current Status

Sr. No.	District	Location	No. of Units	No. of Rooms	No. of Beds	Of which RTDC bed capacity
1	Jaipur	Jaipur				
		• Hotels	300	5085	10170	• Gangaur (126) • Swagatam (100) • Tourist Hotel (66) • Teej (109) • Durg Café (2)
		• PG Accommodation	114	342	684	
		Samode	2	85	170	
		Kanota	1	15	30	
		Sambhar	1	10	20	
		Ramgarh	3	35	70	• Jheel T V (20)
		Shahpura	1	6	12	• Motel Shahpura (12)
2	Dausa	Dausa	1	1	2	• Motel Dausa (2)
		Mahuwa	1	5	10	• Motel Mahuwa (10)
		Bhandarej	1	35	70	
		Kala Kho	1	18	36	
		Barawanda	1	15	30	
		Khawa Raoji	1	10	20	
	Tonk	Pachewar	1	20	40	
		Rajmahal (170 Kms from Jaipur on Jaipur-Kota Rd.)	1	10	20	
		Awan (50 Kms from Tonk)	1	12	24	
	Total		428	5662	11324	9 (447)

6.5.24 As seen from the Exhibit, the Dhundhar circuit has a capacity of approx. 5662 rooms (approx. 11324 beds). Jaipur has the most number of hotel rooms anywhere in the state. Of the total room capacity in the Dhundhar circuit, approx. 95% is concentrated in Jaipur alone. This includes about 15 heritage hotels with a capacity of approx. 550 rooms and 1100 beds. Jaipur also has the highest number of 5-star, 5-star Deluxe and Heritage hotels in the state. This category of hotels has a room capacity of approx. 1400 accounting for nearly 25% of the total room capacity in the city.

6.5.25 The accommodation available at other places in the circuit are mostly heritage hotels usually catering to the foreign groups. Samode Haveli and Samode Bagh have also emerged as popular weekend/ short holiday destination for domestic tourists coming from Delhi. A budget tourist does not have any option but to stay in Jaipur which has about 2700 rooms in the economy category.

6.5.26 A list of proposed and ongoing projects in the region is provided in Exhibit 6.43

Exhibit 6.43

Proposed Hotel Projects in the Dhundhar Circuit

Sr. No.	Location	Company Name	Group / Promoter / Collaborator	Details	Investment (Rs. Cr.)	Status of the project
1	Jaipur	Suman Motels	Private (Indian)	40 rooms	22	Under implementation
2	Jaipur	Bharat Hotels Ltd.	Private (Indian)	200 rooms	NA	Under implementation
3	Jaipur	Jaypee Hotels	Jayprakash Group	NA	NA	Under implementation
4	Jaipur	Sarovar Plaza	Private (Indian)	100	NA	2003+
5	Jaipur	Accor Ummed Hotel	Accor and Indian	100	NA	2003+
6	Jaipur	Radisson	Foreign	101	NA	2003+
7	Jaipur	Hyatt	Foreign	NA	NA	2003+

Source: CMIE - Infrastructure and Jones Lang Lasalle - India Hotel Report
NA - Not Available

6.5.27 As seen in the Exhibit above, projects with a planned capacity of over 700 rooms (1400 beds) are proposed/ under implementation in Jaipur. All these projects would add rooms in the premium segment and are expected to be completed in the next 2-3 years. Once completed, there would be an over capacity in the luxury segment of hotels. Apart from these, several small and mid-sized hotel projects have been approved by the DoT.

6.5.28 A list of hotel and resort projects approved by DoT in the Dhundhar region is provided in Appendix 6B.

Wayside Facilities

6.5.29 The current RTDC Midways / Wayside facilities that exist along the various tourist relevant routes in the Dhundhar circuit are given in Exhibit 6.44

Exhibit 6.44

Midway Facilities by RTDC in Dhundhar Circuit

District	Place	Type/ Management	Route Catered to
Jaipur	Shahpura	Midway/ Motel	Jaipur-Behror-Delhi (NH8) and Jaipur-Alwar route, 60 Kms from Jaipur and 200 Kms from Delhi
	Dudu	Midway	Jaipur-Ajmer (NH8) 65 Kms from Jaipur and 65 Kms from Ajmer

Wayside Facility Gaps

6.5.30 The future requirements for wayside facilities are as follows:

- For tourists moving from the Dhundhar circuit towards Shekhawati region, there are no RTDC wayside facilities on the 110 Kms stretch from Jaipur enroute Sikar (Shekhawati). Chomu (Jaipur) could be possible locations for construction for a small wayside facility for the route
- Another route with absence of wayside facility/ midway is the Jaipur-Sawai Madhopur route (162 Kms). Although, there are two routes that can be taken from Jaipur to Sawai Madhopur, the Jaipur-Tonk-Sawai Madhopur is most preferred. With the further development of the Dhundhar circuit towards the east or Jaipur the Jaipur-Dausa-Sawai Madhopur road is also expected to gain importance. A small wayside facility/ midway on each of these routes is recommended

Tourist Offices

6.5.31 Rajasthan Tourism has tourist offices and kiosks at several places in Jaipur city such as the airport, railway station, MI Road and Amer. A comprehensive list of TRCs and TIBs in the region is given in Exhibit 6.45

Exhibit 6.45

Tourist Information Offices in Dhundhar Circuit

Sr. No	District	TRC / TIB
1	Jaipur	TRC, Government Hostel, M.I. Road, Jaipur TIB, Railway Station, Jaipur TIB, Sindhi Camp, Jaipur (close to the RTDC bus depot) TIB, Sanganer Airport, Jaipur TIB, Amer, Jaipur

6.5.32 There are no other tourist-offices in the region. Given the concentration of tourist activity in Jaipur, these tourist offices are adequate to disseminate information to the arriving tourists. However, there is a need to upgrade these tourist offices and increase their visibility to the tourists.

Development of Tourist Spots / Tourist Site Enhancement

6.5.33 Most monuments in the Dhundhar region, particularly Jaipur, are maintained well, financed through Central Government funds. Exhibit 6.46 provides the list of developmental works being carried out in the Dhundhar circuit under various state and central Government plans.

Exhibit 6.46

Developmental Works in the Dhundhar circuit

District	Name of the Project	State/ CSS	Total Cost (Rs. Lakhs)	Executing Agency	Status
Jaipur	Refurbishment of Amer fort	CSS	20.00	A&M	Ongoing
	Refurbishment of Nahargarh fort	CSS	20.00	A&M	Ongoing
	Sound and Light show at Amer	CSS	140.66	RTDC & ITDC	Ongoing
	Toilet facilities and land-scaping including water supply arrangement at Mughal Gate, Viratnagar	CSS	10.00	A&M	Ongoing
	Conservation of Gaitore Cenotaphs	CSS	2.95	A&M	Ongoing
	Conservation of Hawa Mahal	CSS	27.00	A&M	Ongoing
	Conservation of Jantar Mantar	CSS	20.00	A&M	Ongoing
	Conservation of Maharani Cenotaphs	CSS	8.05	A&M	Ongoing
	Hark system in Amber Palace	CSS	6.14	A&M	Ongoing
	Conservation of Amber Fort	CSS	80.00	A&M	Ongoing
	Website upgrading of DoT And RTDC	CSS	50.00	DoT	Ongoing
	Conservation of Akbar's Kos Minar	CSS	10.72	A&M	Proposed
	Conservation of monuments at Viratnagar	CSS	25.00	A&M	Proposed
	Conservation of Albert Hall	CSS	50.00	A&M	Proposed
Tonk	Refurbishment of Sunheri Kothi	CSS	6.00	A&M	Ongoing
	Conservation of Sunheri Kothi	State	24.02	INTACH	Ongoing
	Refurbishment of wells near Todaraisingh	CSS	10.00	ASI	Proposed
Dausa	Refurbishment of Abhaneri well	CSS	25.00	ASI	Proposed
	Conservation of Geejgarh Fort	CSS	7.00	A&M	Proposed

CSS=Centrally Sponsored Schemes

Source: DoT, Rajasthan

Sanctuaries/ Eco-tourism

6.5.34 The Dhundhar region has two sanctuaries totally spanning over an area of 350 Sq. Kms., the details for which are given in Exhibit 6.47

Exhibit 6.47

Sanctuaries in Dhundhar Circuit: Existing Status

Protected Area	Area (Sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access
Jamwa Ramgarh W.L. Sanctuary	300	• Panther, chital, wild boar, hyena, etc. • Ramgarh Fort	At Jaipur • RTDC hotels • Private hotels	• Jaipur – 35 Kms
Nahargarh W.L. Sanctuary	50	• Leopard, hyena, wild boar, fox, jackal and migratory and land birds • Also visit to Nahargarh, Jaigarh, Amer, Keast Kyari, Lake Bhavsagar	Jaipur • RTDC/ITDC hotels • Private hotels • Forest Resthouse	• Outskirts of Jaipur

Ongoing and Proposed projects

6.5.35 Mayla Bagh and Odi Ramsagar are located in the Nahargarh Wildlife Sanctuary near Jaipur. The outstretch of dense Dhok forests and wild animals in the vicinity of Jaipur city makes these places an ideal circuit of trekkers, wildlife lovers, bird watchers and others. It is necessary to upgrade the available buildings for tourists and campers. At Mayla Bagh it is proposed to repair the old structure and develop a walking trail/ trekking path from Mayla Bagh to Akheda bund. At Odi Ramsagar it is proposed to convert Choti Hodi into a rest house. Development of camping sites and shelters is also being proposed. The details of the works are as provided in Exhibit 6.48

Exhibit 6.48

Proposal for Development of Eco-Tourism at Nahargarh WLS

Sr. No.	Details of Work	Amount (Rs. Lakhs)
1	Repair of old structure	3.00
2	Development of walking trail / trekking path from Mayla Bagh to Akheda Bund	0.50
3	Publicity	0.50
	Total	4.00

6.5.36 Presently, there are no development plans for the Jamwa Ramgarh sanctuary.

New Tourism Products

6.5.37 Jaipur has in the recent years positioned itself as a Convention Centre and has hosted a few international and national conventions. Given its excellent with Delhi and Mumbai and the leisure activities it offers to the visiting delegates, Jaipur can be aggressively promoted as a convention centre with a difference. It is necessary to construct few more convention centres or convert old palaces into convention centres. Similarly, other tourism product concepts such as Resorts and Amusement Parks can also be explored. Several resorts and amusement park projects have been proposed in the Dhundhar region. The Delhi-Jaipur highway especially offers several opportunities for new projects**.**

6.5.38 Some of the other projects already identified by the DoT in the Dhundhar region are as follows:

- Ropeway project between Amber-Jaigarh: Jaipur.
- Film city: Jaipur
- Palace on waves, Ramgarh Lake, Jaipur

6.5.39 Besides these, the region also has scope to develop few other projects such as Theme/ speciality restaurants, cultural complexes and Handicrafts Plaza.

Summary of Infrastructure in Dhundhar Circuit

6.5.40 Exhibit 6.49 provides a summary of tourism relevant infrastructure in the Dhundhar circuit.

Exhibit 6.49

Tourism Relevant Infrastructure in Dhundhar Circuit

Category	Current Status	Potential for Development		
		Short Term	Medium Term	Long Term
Connectivity Infrastructure	Well developed	✓	✓	✓
		In line with tourist traffic		
Accommodation	Well developed	✓	✓	✓
		In line with tourist traffic , Need for mid-range hotels		
Midway/ Wayside Facilities	Adequate	✓		
Tourist Offices	Adequate			
Others (Recreational Facilities, Shopping Facilities, etc)	Adequate	✓	✓	
Monuments/ Site Enhancement	Adequate	✓		
Sanctuaries/ Eco-Tourism	Not developed	✓	✓	
Tourism Products (Rural Tourism, Resort Tourism, Health Tourism, etc)	Nascent stage	✓	✓	✓

Evaluation of Potential for Tourism Growth and Traffic Forecast Assumptions

6.5.41 The evaluation of the Dhundhar circuit from the viewpoint of potential for tourism growth in the future is based on various factors as outlined in Exhibit 6.50

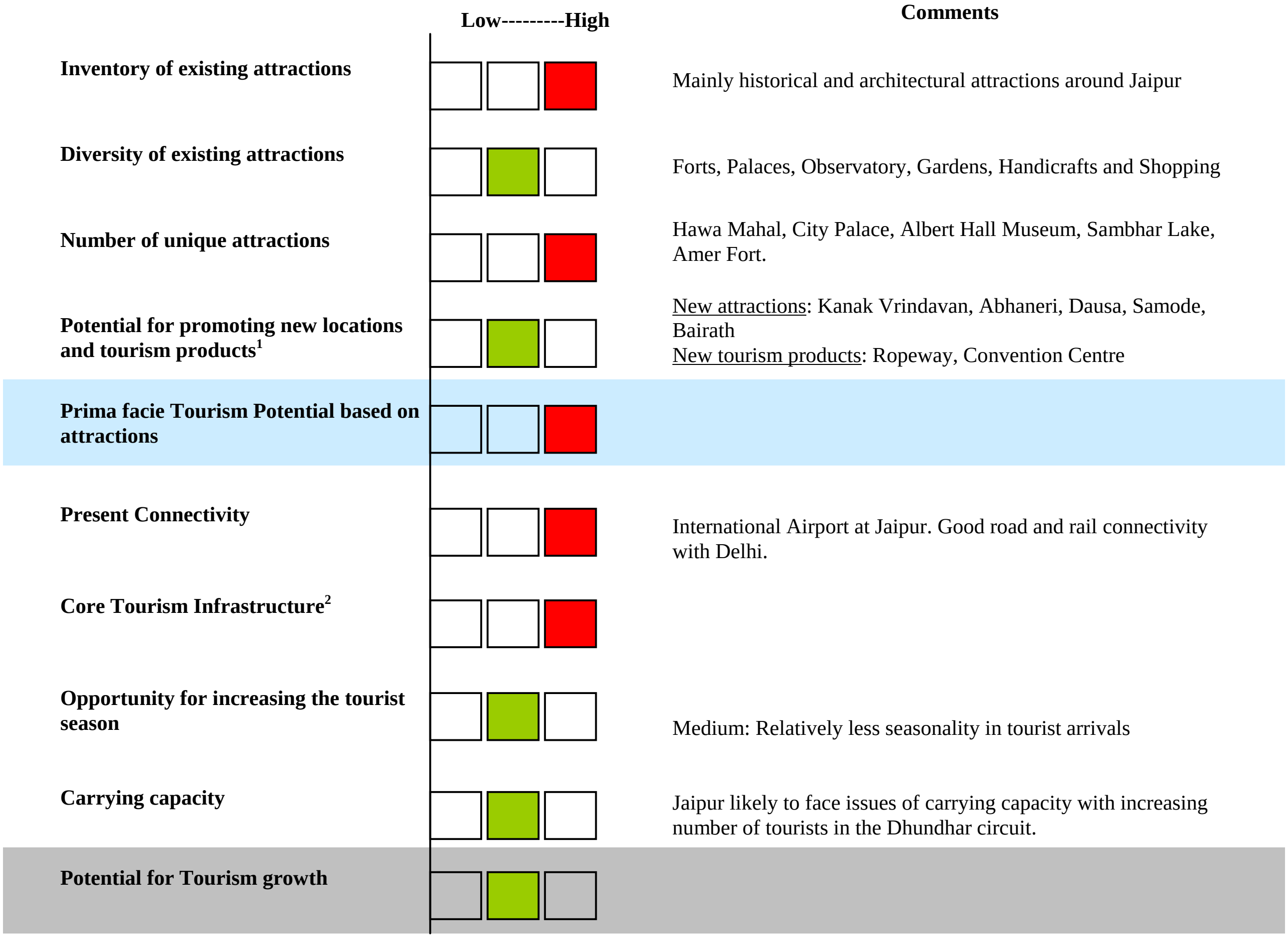
6.5.42 The Dhundhar circuit consists of the state capital and number of unique tourist attractions such as Hawa Mahal, City Palace, Abhaneri step-well, etc. The connectivity links in this region are also well developed. Although there is a saturation of tourist potential in Jaipur City, the region per se has enough scope to accommodate increasing tourist traffic.

6.5.43 The Dhundhar circuit consists of the state capital and number of unique tourist attractions such as Hawa Mahal, City Palace, Abhaneri step-well, etc. The connectivity links in this region are also well developed. Although there is a saturation of tourist potential in Jaipur City, the region per se has enough scope to accommodate increasing tourist traffic.

6.5.44 Foreign tourist arrivals in Jaipur is likely to see a good growth in the future, mainly because of tourists arriving on the International Flights landing in Jaipur.

<u>Exhibit 6.50</u>

<u>Dhundhar Circuit: Evaluation of Potential for Tourism Growth</u>



6.5.45 Based on this assessment the forecast growth rates for the major locations within the Hadoti circuit are as given below in Exhibit 6.51

<u>Exhibit 6.51</u>

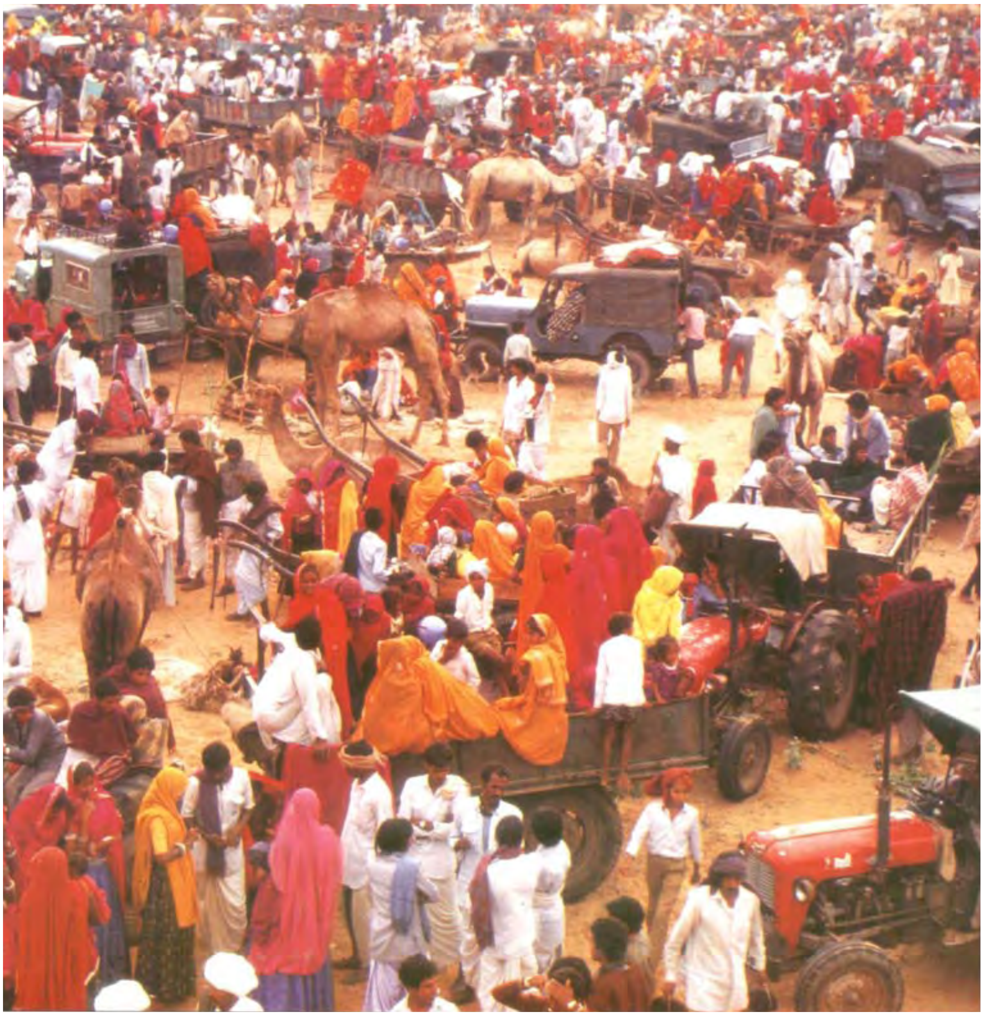
<u>Dhundhar Circuit – Forecast Growth Rates in Tourist Arrivals</u>

Location	Tourist category	Short Term	Medium Term	Long Term
Jaipur	Domestic	3%	2%	2%
	Foreign	3%	3%	5%

Note: Short term growth rates are based on 'average' tourist arrival figures from 1997-2001. This has been done to discount the irregularities in tourist arrivals in the year 2001

Albert Hall Museum, Jaipur

Amer Fort - Outskirts of Jaipur - Popular with tourists visiting Jaipur



Sheetla Mata Fair, Chaksu - Annual event held in March-April

6.6 GODWAR CIRCUIT

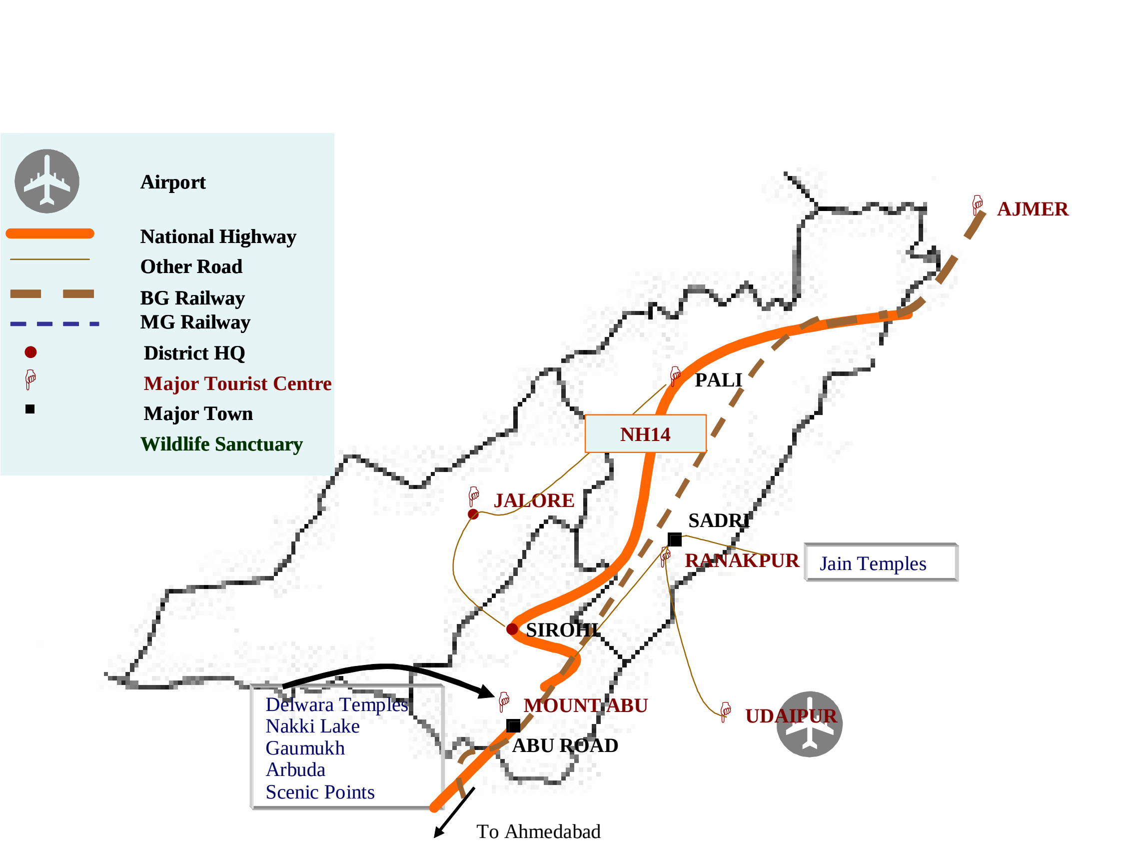
Overview of the Circuit

Background

6.6.1 The Godwar circuit consist of the only hill station in Rajasthan- Mount Abu. The beautiful temple town Ranakpur is the other important attraction in the circuit. The former is very popular leisure destination with the tourist coming from Gujarat, whereas the latter is a pilgrim centre, popular with both domestic as well as foreign tourist. Other location falling under the circuit, which is relatively unexplored by the tourist, is the simple Rajasthani town of Jalore. Thus, the Godwar circuit is essentially a two location circuit, of which Mount Abu is often covered as a standalone circuit.

6.6.2 A map of the Godwar tourism circuits provided in Exhibit 6.52

Exhibit 6.52
Map of the Godwar Circuit



Geography and Topography

6.6.3 Mount Abu lies 1720 m above the sea level, and forms the south-western tip of the Aravalli range. The hill station stretches along a 20 Kms long plateau and is approached from Abu Road in the south east. The area is well wooded with flowering trees, and a good variety of birdlife. Mount Abu benefits from lower temperatures and cooling breezes. The summer temperatures in Mount Abu are 27-28°C when those in the plains are 32-34°C. Mount Abu lies in the Sirohi district of Rajasthan.

6.6.4 Ranakpur lies in the Pali district of Rajasthan close to the Pali and Rajsamand district border. Surrounded by hills on all sides the Ranakpur temples lie in the protected area of Kumbhalgarh wildlife sanctuary

Travel links

6.6.5 The Godwar region is well connected to the rest of the state as well to Gujarat and Mumbai in the south by rail and road. There is no airport in the region and the closest airport is at Udaipur, which is approx. 90 Kms from Ranakpur and 185 Kms from Mount Abu. The closest railhead for Mount Abu is Abu road at a distance of 22 Kms. The national highway NH14 also passes through Abu Road.

Major Tourist Spots and Attractions

6.6.6 Godwar region has relatively lesser number of tourist attractions. However, these attractions are very unique, and hence the region attracts many domestic as well as foreign tourists. The main attractions in the region are given in Exhibit 6.53

Exhibit 6.53

Major Tourist Locations in Godwar Circuit

District	Major Attractions	Major Day-excursions	Major Events
Sirohi	Mount Abu (1) Dilwara Jain Temples (2) Nakki Lake (3) Gaumukh Temple (4) Arbuda (5) Adhar Devi Temple (6) Sunset Point (7) Honeymoon Point (8) Guru Shikhar (Highest peak) (9) Achalgarh Fort	(1) Ranakpur (181 Kms)	Summer Festival (June) Winter Festival (December)
Pali	Ranakpur 1) Jain Temple Complex	(1) Kumbhalgarh (48 Kms) (2) Mount Abu	
Jalore	Jalore (1) Jalore Fort		

Main Tourist Locations and Attractions

6.6.7 Tourist activity is mainly concentrated around two major locations- Mount Abu and Ranakpur. Very few tourists go to Jalore and other places in the region.

- **Mount Abu**: Mount Abu is the popular hill station of Rajasthan. It offers two main tourism products- leisure and religion. Many domestic tourist come to Mount Abu for its pleasant climate and scenic beauty. Mount Abu has the beautiful Nakki Lake, around which most of the tourist activity is centered. Other interesting sites in the place such as the Sunset point and the Honeymoon point also attract crowds of domestic tourists.
- Mount Abu also receives many foreign tourists, who come to see the famous Dilwara temples, famous for their intricate architecture. Various other Jain and Hindu temples around the place, notable amongst them being the Gaumukh,

Arbuda temple and Adhar Mata temple, are also visited by the tourists arriving in Mount Abu.

- Mount Abu is usually covered as a standalone destination. Many tourists also cover Mount Abu on short overnight excursion from Udaipur coming via Kumbhalgarh and Ranakpur.
- **Ranakpur**: The other important tourist location in the region Ranakpur is a small temple town known for its Jain temple complex. This place is popular among the domestic as well as the foreign tourists. It is one of the five holy places for the Jains. The beautiful temple architecture and carving attract many foreign travellers who take a short excursion ex-Udaipur.

Less Frequented Tourist Locations

6.6.8 Except Mount Abu and Ranakpur, other places in the Godwar regions that have very little tourist potential. Places like Pali, Sirohi, Jalore, although unexplored, have very little to offer in terms of unique attractions. Jalore fort is the only notable attraction that has the potential to be included as a part of the circuit.

Existing Tourist Traffic Trends

6.6.9 Exhibit 6.54 gives the tourist traffic trends for Mount Abu and Ranakpur.

Exhibit 6.54

Tourist Arrivals in the Godwar Region

Tourist Location	Category of Tourist	1996	1997	1998	1999	2000	2001	CAGR	Comments
Mount Abu	Domestic	1124432	1391832	1056113	1338431	1254770	1282940	3%	Popular weekend getaway for Gujarat.
	Foreign	13785	15818	14259	13413	14427	13752	0%	
	Total	1138217	1407650	1070372	1351844	1269197	1296692	3%	
Ranakpur	Domestic	57000	55320	55756	55520	56949	61535	2%	Popular among both domestic and foreign tourists for religion and architecture respectively.
	Foreign	350	301	23976	21676	23816	24144	133%	
	Total	57350	55621	79732	77196	80765	85679	8%	

Domestic Tourist Traffic

- The Godwar circuit has been traditionally popular among the domestic tourist. This was primarily because of the fact that the region houses the only hill station in Rajasthan. The place has been a traditional weekend destination for the domestic tourists from Gujarat.
- Some of the holy places for the Jain community, respectively the Dilwara temples and Ranakpur also attract a number of large pilgrim tourists. The domestic traffic in both the places has been growing at a flat rate of 2% over the past few years.

Foreign Tourist Traffic

- The Jain temples of Dilwara and Ranakpur are known for their intricate carvings and are thus, popular with the foreign tourists. The foreign tourist arrivals for Mount Abu have stagnated in the recent years. However, arrivals in Ranakpur have shown a growth trend recently.

- In the recent years, many foreign tourists have started visiting Mount Abu for Dilwara temples. But they prefer not to stay in Mount Abu as it is overcrowded. Foreign tourists prefer taking day excursion ex-Udaipur.

Connectivity Infrastructure

Air

6.6.10 There is no airport in the Godwar region. The nearest airports from Mount Abu are Udaipur (185 Kms) and Ahmedabad (221 Kms), and for Ranakpur is Udaipur (80 Kms).

6.6.11 Udaipur has services to Jodhpur and Jaipur in Rajasthan and Delhi and Mumbai Rajasthan. Ahmedabad has regular commercial services to Delhi, Mumbai, Kolkata, Baroda, Bangalore and Hyderabad.

6.6.12 Direct air connectivity, particularly with Jaipur, will go a long way in attracting many foreign tourists who currently do not include Mount Abu and Ranakpur in their itinerary due to time constraints. Air taxi/ helicopter services would make Mount Abu and Ranakpur more accessible from Jaipur.

6.6.13 Helipads in Mount Abu and Ranakpur have been identified by the DoT to invite private investment for operating air services in the region.

Rail

6.6.14 The nearest rail link for Mount Abu is Abu Road (22 Kms), which falls on the main Delhi-Ahmedabad BG route. There are regular train services that connect Abu Road to Delhi, Jaipur, Bikaner, Jodhpur, Ajmer and Ahmedabad. There are three daily train services between Abu Road and Ahmedabad, two daily train services between Abu Road and Delhi, Jaipur and Jodhpur, one daily service between Abu Road and Bikaner.

6.6.15 The nearest rail head for Ranakpur is the small station at Falna (35 Kms). Only passenger trains stop at Falna. For most long distance connectivity the nearest rail head for Ranakpur is Abu Road (160 Kms).

Road

6.6.16 NH14 passes through the Godwar circuit, connecting the region with Delhi, Jaipur and Ajmer in the north and Ahmedabad in the south. However, the intra/ inter region road connectivity is poor. Most places in Pali, Jalore and Sirohi are connected by a few state highways and small district roads. Abu Road is connected with Udaipur by a state highway with fair road condition. The road connectivity to Ranakpur is adequate.

6.6.17 Several RSRTC state bus services as well as private bus and taxi services are available between Udaipur and Mount Abu, Udaipur and Ranakpur and Mount Abu and Ranakpur. State bus services are also available between Mount Abu/ Sirohi and Jalore and between Mount Abu / Sirohi Sanderao to Jodhpur. Bus services (government and private) are also available between Mount Abu and Ahmedabad.

6.6.18 A list of on-going/ proposed projects in the region is given in Appendix 6A.

Tourism Related Direct Infrastructure

6.6.19 Mount Abu has fairly developed tourism related infrastructure in terms of accommodation, tourist offices, connectivity and tourism related services. In contrast to this, Ranakpur, although a popular pilgrim place lacks the necessary tourism infrastructure.

Accommodation

6.6.20 Tourist stay in the Godwar region is primarily at Mount Abu. Pilgrims visiting Ranakpur occasionally stay in dharamshalas at Ranakpur. The average length of stay in Mount Abu for a foreign tourist is 1 day, whereas that for a domestic tourist is 2 days. The average length of stay of a tourist in Ranakpur is 1 day. Exhibit 6.55 provides an overview of hotel accommodation in the Godwar circuit region.

Exhibit 6.55

Accommodation in Godwar Tourism Circuit- Current Status

Sr. No.	District	Location	No of Units	No. of Rooms	No. of Beds	Of which RTDC bed capacity
1	Sirohi	Mount Abu • Hotels • PG Accommodation	 108 35	 1895 154	 4093 335	• Shikar (164)
2	Pali	Ranakpur	1	1	2	• Shilpi (32)
		Pali	1	5	10	• Paniharin (24)
		Barr Motel	1	2	4	• Motel Barr (4)
		Bera (Resort-100 Kms from Mount Abu, 20 Kms from Ranakpur)	1	8	16	
		Rohet (40 Kms from Jodhpur)	1	29	60	
		Dhamli (55 Kms from Ranakpur)	1	15	30	
		Sardar Samand Palace (65 Kms from Jodhpur)	1	19	40	
		Nimaj (15 Kms from Barr)	1	14	26	
		Sodawas (70 Kms from Ranakpur)	1	10	20	
3	Jalore	Bhenswara	1	13	26	
		Daspan	1	11	22	
		Sodawas (70 Kms from Ranakpur)	1	10	20	
		Total	155	2187	4704	4 (224)

6.6.21 As seen from the Exhibit, the Godwar circuit has a capacity of approx. 2187 rooms (approx. 4704 beds). Of the total room capacity, approx. 95% is concentrated in Mount Abu alone. Mount Abu has 4 heritage hotels with a capacity of approx. 120 rooms and 240 beds. Besides these, Mount Abu also has some dharamshalas and dormitories that mainly cater to the pilgrim tourist coming in the town.

6.6.22 Most of the accommodation in the Pali region, apart from that in Ranakpur, caters to the transit tourist. For instance, hotels in Ghanerao, Rohet, Nimaj fall on tourist routes from Gujarat to South Rajasthan to Jodhpur and Ajmer in the central part of Rajasthan.

6.6.23 The total current accommodation in the region is sufficient to meet the overall demand. However, Mount Abu faces serious shortfall of budget rooms during the peak season/ days. Also, given the growth of foreign tourist at Ranakpur, there is a need for 5/4 star accommodation in Mount Abu. Presently, construction activity is restricted. This places a limit on the carrying capacity of Mount Abu.

6.6.24 Ranakpur has very few options for overnight stay of the tourists. There is a need for mid-priced/ luxury accommodation at Ranakpur. Presently the tourists stay at the dharamshalas/ dormitories near the temple complex.

6.6.25 Presently, there are no projects under implementation or planned in the Godwar region. However, the DoT has approved certain hotel/ resort projects in the region, the list of which is given in Appendix 6B.

Wayside Facilities

6.6.26 A list of RTDC Midways / Wayside facilities that exist along the various tourist relevant routes in the Godwar circuit is provided in Exhibit 6.56

Exhibit 6.56

Midway facilities by RTDC in Godwar Circuit

District	Place	Type/ Management	Route Catered to
Bar	Pali	RTDC-Midway	Ajmer-Jodhpur Road (Between Beawar and Raipur on State Highway)
Pindwara	Sirohi	Wayside Facility	Mount Abu-Udaipur Road (NH14)

6.6.27 Besides these, there are several small roadside dhabas at Abu Road that serve food and beverages. However, there is no proper wayside facility in this place. Similarly, there is no wayside facility between Abu road and Jodhpur on the popular Ahmedabad-Jodhpur route.

6.6.28 Projects prioritised under the Central Financial Assistance include wayside facility development at Sanderao (Sirohi-Pali). Two private wayside facilities/ midways have been approved by the DoT at Himawas (Sirohi-Pali road) and Mundara (Abu Road-Pali road). However, no information is available on the status of the project.

New Projects: Wayside Facilities

6.6.29 New midway facilities are recommended at following places:

- On the Udaipur-Mount Abu route at Abu Road
- On the Ahmedabad-Mount Abu

Tourist Offices

6.6.30 A list of TRCs and TIBs in the Godwar region is given in Exhibit 6.57

Exhibit 6.57

Tourist Information Offices in Godwar Circuit

Sr. No	District	TRC / TIB
1	Mount Abu	TIB Mount Abu

6.6.31 There is no other TRC/ TIB in the region. However, given the trends in tourist traffic and the movement of tourists, there is no need for a TRC/ TIB in any other location in the region. In the future, depending on the traffic numbers, there could be a need for a TIB on the Jodhpur route via Pali or Ranakpur.

Development of Tourist Spots / Tourist Site Enhancement

6.6.32 The main monuments in the Godwar region, namely, the Dilwara temples and Ranakpur temples are owned by religious trusts and are maintained very well. The main developmental works being carried out/ proposed in the Godwar region are provided in Exhibit 6.58

Exhibit 6.58

Developmental Works in the Godwar circuit

District	Name of the Project	State/ CSS	Total Cost (Rs. Lakhs)	Executing Agency	Status
Sirohi	General toilets and development works including water supply arrangements at Chandrawati, Abu Road	CSS	10.00	A&M	Ongoing
Sirohi	Upgradation of Shikar, Mount Abu	CSS	49.83	RTDC	Ongoing
Sirohi	Development of Nakki Ghat	CSS	40.00	Municipal Board	Proposed
Sirohi	Conservation of Varmaan Sun Temple, Mount Abu	CSS	8.00	Municipal Board	Proposed
Pali	General toilets and development of lawns at Museum	CSS	5.00	A&M	Ongoing
Pali	Repair work at Sun Temple Ranakpur	CSS	10.00	A&M	Proposed
Jalore	Internal paving for approach and refurbishment of Jalore fort	CSS	50.00	A&M	Proposed

CSS= Centrally Sponsored Schemes

Source: DoT, Rajasthan

Sanctuaries/ Eco tourism

6.6.33 The Godwar region has one wild life sanctuary the details for which are given in Exhibit 6.59

Exhibit 6.59

Sanctuaries in Godwar Circuit: Existing Status

Protected Area	Area (Sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access
Mount Abu W.L. Sanctuary	328	• Panther, wild boar, hyena, sambhar, sloth bear, etc. • Nakki Lake, Dilwara Temples, Gurushikhar at Mount Abu	At Mount Abu • RTDC hotels • Forest Resthouse • Govt. Circuit house • Private hotels	• Mt. Abu – 10 Kms

Ongoing and Proposed Projects

6.6.34 The Rajasthan Department of Forests has proposed several works to develop the Mount Abu wildlife sanctuary as a Eco-tourism destination. A list of proposed projects for the Mount Abu sanctuary is given in Exhibit 6.60

Exhibit 6.60

Proposed Eco-tourism Projects at Mount Abu Sanctuary

Sr. No.	Details of Work	Amount in (Rs. Lakhs)
1	Creation of Interpretation Centre	25.00
2	Development of Nature Camping sites at 3 places	15.00

Sr. No.	Details of Work	Amount in (Rs. Lakhs)
3	Development Trekking routes and Nature Trails	21.00
4	Breeding enclosure for Jungle Fowl	3.00
5	Translocation Centre at Dilwara block	7.00
	Total	**71.00**

Tourism Products

6.6.35 Some of the new tourism product projects identified in the Godwar region by the DoT are as follows:

- Resorts a Barighata, Bari, Banas and Bali
- Ropeway project between Scout Office-Gaumukh: Mount Abu .
- Jalore Fort: Jalore
- Amusement Park, Health Centre, Pilgrim Infrastructure: Mount Abu

6.6.36 Given the topography and the profile of tourists coming to the region, the region also has a good potential for new tourism products such as handgliding/ paragliding, mountaineering, rapling, etc.

Summary of Infrastructure in the Godwar Circuit

6.6.37 Exhibit 6.61 provides a summary of the tourism relevant infrastructure in the Godwar circuit.

Exhibit 6.61

Tourism Relevant Infrastructure in Godwar Circuit

Category	Current Status	Potential for Development		
		Short Term	Medium Term	Long Term
Connectivity Infrastructure	Well developed	✓	✓	✓
Accommodation	Developed	✓	✓	✓
		In line with tourist growth		
Midway/ Wayside Facilities	Poor	✓		
Tourist Offices	Low			
Others (Recreational Facilities, Shopping Facilities, etc)	Low	✓	✓	✓
Monuments/ Site Enhancement	Fairly developed	✓	✓	
Sanctuaries/ Eco-Tourism	Not developed		✓	✓
Tourism Products (Rural Tourism, Resort Tourism, Health Tourism, etc)	Not developed	✓	✓	✓

Evaluation of Potential for Tourism Growth and Traffic Forecast Assumptions

6.6.38 The evaluation of the Godwar circuit from the viewpoint of potential for tourism growth in the future is based on various factors as outlined in Exhibit 6.62

6.6.39 The Godwar Circuit, which consists of Mount Abu and Ranakpur, is a popular circuit amongst tourists from neighbouring Gujarat. The circuit offers limited diversity of

Dilwara Temple, Mt. Abu - Exquisite carvings

Ranakpur Temple - One of te five holy places of the Jain community

Nakki Lake, Mt. Abu

attractions, except Mount Abu, which is the only hill station in the state. The circuit is also easily accessible from Gujarat, both by road and rail.

6.6.40 In the longer term, Mount Abu would be constrained by its carrying capacity because of its geography and ecological sensitivity. Further construction activity at the hill station is also restricted by legislation passed for maintaining the ecological balance of the place. As such it offers limited scope for development. Ranakpur is unlikely to see major increase in tourist arrivals in the future.

Exhibit 6.62

Godwar Circuit: Evaluation of Potential for Tourism Growth

	Low--------High	Comments
Inventory of existing attractions		Natural and religious attractions
Diversity of existing attractions		Hill station, temples and lake
Number of unique attractions		Mount Abu – Only hill station in Rajasthan, Ranakpur and Dilwara – Jain temples with unique carvings
Potential for promoting new locations and tourism products[1]		New attractions: Jalore New tourism products: Health resorts, Nature trails, etc.
Prima facie Tourism Potential based on attractions		
Present Connectivity		Excellent rail and highway connection. No airport in the circuit - Limited and only small flights to Udaipur, the nearest airport
Core Tourism Infrastructure[2]		Large number of hotels in Mount Abu. Only a few in Ranakpur.
Opportunity for increasing the tourist season		High: Popular region with vacationing tourists from Gujarat. Tourist season extends into summer months of April and May
Carrying capacity		Carrying capacity – an issue at Mount Abu
Potential for Tourism growth		

6.6.41 Based on this assessment the forecast growth rates for the major locations within the Godhwar circuit are as given below in Exhibit 6.63

Exhibit 6.63

Godhwar Circuit – Forecast Growth Rates in Tourist Arrivals

Location	Tourist category	Short Term	Medium Term	Long Term
Mount Abu	Domestic	2%	2%	2%
	Foreign	7%	4%	5%
Ranakpur	Domestic	1%	2%	2%
	Foreign	5%	4%	5%

Note: Short term growth rates are based on 'average' tourist arrival figures from 1997-2001. This has been done to discount the irregularities in tourist arrivals in the year 2001

6.7 MERWARA-MARWAR CIRCUIT

<u>Overview of the Circuit</u>

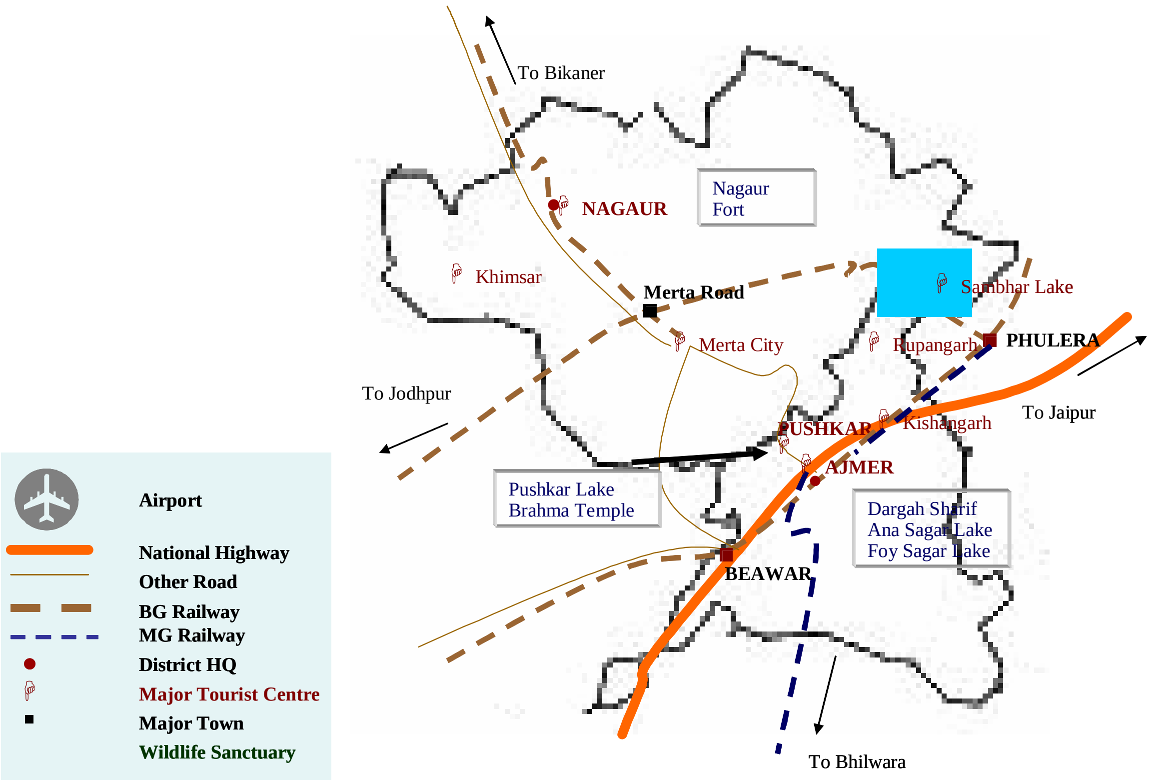
Background

6.7.1 The desert circuit primarily includes pilgrim towns of Ajmer and Pushkar, and relatively unexplored places like Merta and Nagaur. The circuit covers the two central districts of Rajasthan, namely, Ajmer and Nagaur.

6.7.2 A map of the Merwara-Marwar circuit is provided in Exhibit 6.64

<u>Exhibit 6.64</u>

<u>Map of the Merwara–Marwar Circuit</u>



Geography and Topography

6.7.3 Ajmer and Pushkar are located 132 Kms west of Jaipur, in a scenic valley encircled by the Aravalli hills. The valley is interspersed with several lakes forming important attractions for the two holy towns. Surrounded by hills on three sides, Pushkar is 11 Kms from Ajmer and situated on the banks of the Pushkar lake.

6.7.4 Ajmer with a population approx. 4.9 Lakhs is the fifth largest city in the state. Other important cities in the region include Kishangarh and Nagaur. The Merwara–Marwar circuit falls in one of the most densely populated region in the state.

Travel links

6.7.5 Jaipur Airport (located at a distance of 130 Kms) is the closest airport for the Merwara-Marwar region. Regular services are operational from Jaipur to major cities such as Delhi, Mumbai, Ahmedabad, and Kolkata.

6.7.6 Ajmer is an important junction on the Western railway (Mumbai–Delhi via Ahmedabad). A well-developed rail network connects the Ajmer to Mumbai, Delhi, Kolkata, Pune, etc. Merta Road (another junction on the Eastern Railway) and Nagaur also fall on the Jaipur–Bikaner route.

6.7.7 The Merwara-Marwar region is also well connected by roads with National Highway (NH8) passing through Ajmer and Kishangarh. Being centrally located, Ajmer also has excellent road connectivity with most circuits in the state.

Major Tourist Spots and Attractions

6.7.8 Exhibit 6.65 indicates the major tourist locations and attractions in the Merwara–Marwar circuit. The region has relatively less number of tourist attractions, though some of the most visited ones, as compared to other circuits in the state.

Exhibit 6.65

Major Tourist Locations in Merwara–Marwar Circuit

District	Major Attractions	Major Day-excursions	Major Events
Ajmer	Ajmer City 1) Dargah of Khwaja Moinuddin Chishti (Sufi Shrine) 2) Shahjahan's Mosque 3) Adhai-din-ka-Jhonpra (monument) 4) Taragarh Fort 5) Nasiyan (Jain temple) 6) Ana Sagar lake 7) Foy Sagar lake 8) Museum 9) Mayo College Pushkar (1) Brahma Temple (2) Savitri Temple (3) Pushkar lake and ghats	Ex-Ajmer / Pushkar (1) Merta (temples and ruins) (75 Kms) (2) Kishangarh (paintings) (27 Kms) (3) Mangliyawas (Kalpa Vriksha) (26 Kms) (4) Makrana (Marble Quarries) (108 Kms.) (5) Roopangarh (Fort) (25 Kms)	• Pushkar Fair (October-November) • Annual Urs at Ajmer (according to lunar calendar)
Nagaur	Nagaur City (1) Nagaur Fort (2) Moti Mahal (Palace) (3) Badal Mahal (Palace) (4) Hawa Mahal (Palace) (5) Baradari (Courtyard) (6) Temples (7) Tarkin ka Dargah (mosque)	(1) Merta (temples and ruins) (75 Kms)	• Nagaur Cattle Fair (January-Febraury)

Main Tourist Locations and Attractions

6.7.9 Although termed as a circuit, the Merwara-Marwar circuit is mainly concentrated around the Ajmer-Pushkar hub. Other locations in the circuit are of very little significance and hence less visited by both, the domestic and the foreign tourists. The theme of the circuit is really ‘pilgrim tourism’. Some salient observations with respect to the main tourist locations and the type of tourists they attract are as follows:

- **Ajmer**: Ajmer, one of the main cities in the circuit, has the famous shrine or dargah of the sufi saint Khwaja Moinuddin Chishti. The annual Urs at the dargah attracts pilgrims of all faiths form around the country and also from abroad. Other attractions in Ajmer include the marvelous Shahjahan’s mosque inside the dargah, Adhai-din-ka-Jhonpra and the lakes.
- **Pushkar**: Pushkar houses the only temple in India dedicated to Lord Brahma and is an important pilgrimage for the Hindus. Located on the banks of the Pushkar Lake, the temple town is famous for the colourful Pushkar fair held every year during October-November. It attracts large number of domestic as well as foreign tourist during the 5-day fair.

Less Frequented Tourist Locations

6.7.10 Apart from Ajmer and Pushkar, the Merwara-Marwar circuit has several other locations of interest to the tourists. Since most tourists (especially domestic) come to Ajmer and Pushkar specifically for pilgrimage, the tourists take a return journey to their towns immediately after completing the pilgrimage. Moreover, the other places within the circuit are not unique in terms of their attractions. Hence they are less visited. Some of the less frequented / unexplored tourist locations in the area include:

- **Merta**: Merta is a historic town at a distance of 75 Kms from Ajmer. The town is known for its association with the famous saint-poet Meera and the temple dedicated to her. The town also has the famous Charbhuja temple and a massive mosque constructed by Emperor Aurangzeb.
- **Nagaur**: Nagaur (165 Kms from Ajmer) has a fort situated in the centre of the city, which houses old palace, water cisterns and other ruins. These buildings in the fort are adorned with some excellent murals. The town also possesses some monuments of historical importance such as, shrine of Khwaja Hamiduddin Nagauri and Amar Singh Rathore ki Chhatri. Nagaur, however, gets the highest number of tourists during its annual cattle fair held in January-Febraury.
- **Kishangarh**: 27 Kms. From Ajmer on the Jaipur road, Kishengarh is known for its finest school of miniature painting established in the 18^{th} century. The exquisite ‘Bani Thani’ paintings are very unique to this place. Kishangarh, however, does not have any other tourist attraction.
- **Others**: Places like Roopangarh, Mangliyawas and Makrana in the circuit do not receive any significant number of tourists. Mangliyawas gets tourists from the nearby areas and also from outside the state to worship two trees of the rare species – known as ‘Kalpa Vriksha’. Roopangarh fort and palace has been converted to a heritage hotel. Makrana is known for its marble mines.

Existing Tourist Traffic Trends

6.7.11 The major tourist locations in the desert circuit include Ajmer and Pushkar. Ajmer gets the highest number of tourists anywhere in Rajasthan. Similarly, Pushkar receives the third highest number of tourists in the state after Ajmer and Jaipur.

6.7.12 Tourist traffic and past growth trends for the major tourist centres in the Merwara-Marwar circuit are provided in Exhibit 6.66. The salient observations from the Exhibit are provided in the subsequent paragraphs.

Exhibit 6.66

Tourist Arrivals in the Merwara-Marwar Circuit

Tourist Location	Category of Tourist	1996	1997	1998	1999	2000	2001	CAGR	Comments
Ajmer	Domestic	527008	493596	783782	766497	1088000	1269309	19%	Popularity growing consistently over the past few years.
	Foreign	56126	60066	48808	45202	51344	54040	-1%	
	Total	583134	553662	832590	811699	1139344	1323349	18%	
Pushkar	Domestic	702604	700515	679303	731124	951000	865000	4%	Large concentration of arrivals during the annual Pushkar Fair. Foreign tourist arrivals stagnant.
	Foreign	48993	50198	38150	49279	52011	46182	-1%	
	Total	751597	750713	717453	780403	1003011	911182	4%	

Source: DoT, Rajasthan

Domestic Tourist Traffic

- Domestic tourist traffic of ~12.7 Lakhs in Ajmer and ~8.65 Lakhs in Pushkar, makes the Merwara–Marwar circuit the most popular circuit in the state.
- Ajmer with its large base of tourist arrivals has also recorded an impressive 19% growth in domestic arrivals in the past six years. Pushkar during the same period has grown at a lower rate.
- Though there are other tourist spots in the region such as Merta, Nagaur, etc. none of them currently have significant tourist traffic. Tourist arrival in Nagaur is highly concentrated during the annual cattle fair. Mangliywas mostly gets visitors from the nearby places.

Foreign Tourist Traffic

- Ajmer and Pushkar received equal amount of foreign tourists (close to 50,000). The growth in the foreign tourist traffic has also followed the same pattern in the recent years inspite of the fact that most foreign tourists visit Pushkar during the Pushkar fair, whereas foreign tourist arrivals at Ajmer are spread out over a much larger period.
- Pushkar, the traditionally popular destination with the foreign tourists has, however, shown a stagnant or marginal decline in the number of arrivals. This is attributed to the limited carrying capacity of the area.
- Nagaur is the next most popular destination (after Ajmer and Pushkar) for foreign tourists. Although no statistics are available for foreign tourist arrivals at the other locations within the circuit, it is estimated that none of the locations receive more than 20,000 foreign tourists in a year.

Connectivity Infrastructure

6.7.13 Travel links of various tourist spots in the Merwara – Marwar region are shown in Exhibit 6.67

Exhibit 6.67

Travel Connections of Towns within the Merwara – Marwar Region

Sr. No.	Towns	Connectivity	Comments
1	Ajmer	Road (NH8), Rail (Broad Gauge)	Important junction on the Western Railway (Mumbai–Delhi) Excellent road connectivity with 'hub' cities in most circuits Jaipur (130 Kms) is the closest airport
2	Pushkar	Road (SH)	Ajmer is the closest Railhead Ajmer bypass connects Pushkar to NH8
3	Merta	Road	Poor road connectivity with Ajmer / Pushkar
4	Nagaur	Road (SH), Rail (Broad Gauge)	Good connectivity from Bikaner

Air

6.7.14 Jaipur Airport (located 130 Kms from Ajmer) is the closest airport. Regular services are operational from major cities such as Delhi, Mumbai, Ahmedabad and Kolkata to Jaipur. An international flight to Dubai has also been started from Jaipur from February 2002. Jodhpur which is at a distance of 210 Kms relatively poor air connectivity (connected only to Mumbai, Delhi, Jaipur and Udaipur).There is a need for more direct flight services from cities like Hyderabad and Lucknow to Jaipur, specifically given the cities' demographic profile.

6.7.15 With an objective of improving the air connectivity of Ajmer with rest of the country, AAI has recently commissioned a feasibility study for construction of a domestic airport at Ajmer.

Rail

6.7.16 The Merwara – Marwar region is connected to the main cities in the country primarily via Ajmer. Ajmer is a major junction on the main west-north rail trunkline and is also connected to Delhi (4 trains daily, 2 trains running on specific days of the week), Ahmedabad (1 train daily, 5 trains running on specific days of the week), Mumbai (1 daily) Bangalore (once a week), Sealdah (once a week), Dehradun (once a week) and Bareilly (twice a week). Ajmer is also connected to Mewar region (Udaipur) through 2 trains daily. independently. Shatabdi Express, which runs from Ajmer to Delhi six days a week, reaches Delhi within 6.5 hours. Connectivity within the main locations in the circuit is however inadequate. As a result, the circuit is usually done by road.

Road

6.7.17 The Merwara–Marwar Circuit is well connected by roads with National Highway (NH8) passing through Ajmer. Pushkar is also connected by Ajmer bypass to the NH8. Connections with Kishangarh, Mangliawas, Roopangarh, Makrana from Ajmer are excellent. Road to Merta, which extends further to Nagaur is narrow and damaged in places.

6.7.18 Being centrally located, the circuit also has excellent connections with other important circuits in the state like Desert circuit (Jodhpur–Jaisalmer–Bikaner), Godhwar Circuit

(Mount Abu–Ranakpur), Mewar Circuit (Udaipur–Chittaurgarh–Ranakpur), Dhundhar Circuit (Jaipur) and Hadoti (Bundi–Kota–Jhalawar). In fact, critical road links to all these circuits radiate out of Ajmer.

6.7.19 Appendix 6A provides the list of proposed road construction and maintenance projects in the Merwara – Marwar Circuit.

6.7.20 The roads within the Merwara – Marwar Circuit which need to be prioritised for carrying repairs are listed below:

- Ajmer to Pushkar (11 Kms)

<u>Tourism Related Direct Infrastructure</u>

6.7.21 Given the arrival statistics at these places, the two towns in the Merwara-Marwar circuit, namely Ajmer and Pushkar have fair direct tourism infrastructure in terms of connectivity, accommodation, tourist information services, etc. as described below.

Accommodation

6.7.22 The tourist stay in the region (and hence the need for appropriate tourist accommodation) is concentrated in Ajmer and Pushkar. Tourists (domestic and foreign) stay either in Ajmer or Pushkar. The typical stay duration of the foreign tourist in Pushkar is two days. Very few foreign tourists stay at Ajmer. A domestic tourist, on the contrary, stays either at Ajmer or at Pushkar only for one day only. The average stay duration of foreign tourists is high in Pushkar on account of the Pushkar fair, which runs over 4 days. Very few tourists undertake day excursions from Ajmer or Pushkar. The remaining places in the circuit are covered while traveling from one region / circuit to another. Exhibit 6.68 provides an overview of hotel accommodation in the Merwara–Marwar Circuit.

<u>Exhibit 6.68</u>

<u>Accommodation in Merwara-Marwar Circuit- Current Status</u>

Sr. No.	District	Location	No. of Units	No. of Rooms	No. of Beds	Of which RTDC bed capacity
1	Ajmer	Ajmer • Hotels • Paying Guest Accommodation	 57 12	 1600 35	 3200 70	 Khadim (122)
2	Pushkar	Pushkar • Hotels • Paying Guest Accommodation • Tents #	 32 13 750	 950 40 750	 1900 80 2100	 Sarovar (84) Tourist Village (60) 250 tents
3	Others		12	250	500	
	Total		876	3625	7850	4 (766)

 # Only during the Pushkar Fair

6.7.23 As seen from the Exhibit, the Merwara Marwar circuit has a capacity of approx. 3625 rooms (approx. 7850 beds). Of the total room capacity, close to 95% is concentrated in Ajmer and Pushkar.

6.7.24 The current status of the accommodation facilities available at each of these locations is discussed below:

- **Ajmer City**: Ajmer has the largest number of hotels and hotel rooms / bed capacity in the Merwara - Marwar circuit. There are no stare category or heritage hotels in Ajmer. Hotel Mansingh Palace is the only 3 star hotel in Ajmer. It is estimated that out of 1635 hotel rooms in Ajmer, the number of rooms in unclassified hotels would be as high as 90%. These are mostly in the lower end / economy hotels, where the pilgrims check in for dumping their luggage / freshening up after a long journey. Paying guest facilities are not so popular amongst the tourists arriving in the city and it is estimated that they account for additional 35 rooms and about 70 beds.
- A large number of tourists take a day excursion from Jaipur and as such do not take a halt in Ajmer or Pushkar. Similarly, domestic pilgrims from outside the state instead of checking in at the hotel, move ahead with their journey after seeking the blessings at the shrine.
- Except for the annual Urs at the shrine, there is very little seasonality in tourist arrivals. Based on this factor the average bed nights required in the city are close to 2800, mostly in the economy category. However, since a large number of tourists cover Ajmer in day excursions, they do not avail of the accommodation facility. The average occupancy at the hotels is expected to be at 70% (far higher than any other place in the state). However, it is estimated that might be a slight shortfall in the hotel room availability during the Urs due to people arriving from all over the country.
- Supplementary accommodation is also made available at railway retiring rooms and dharamshalas.
- **Pushkar**: Pushkar has relatively less number of hotels as compared to Ajmer. The total permanent bed capacity is close to 2000 beds. During the Pushkar Fair the total bed capacity is enhanced to 4100 beds. Like Ajmer a large number of hotels in Pushkar are in the economy / low price category typically catering to the domestic pilgrim crowd. However, unlike Ajmer there are a few (about 4) heritage hotels and resorts in Pushkar. These hotels cater to the foreign tourist arriving during the non-Pushkar fair period.
- Out of the approx. 2000 permanent bed capacity in the town, nearly 90% lies in the budget and economy range. There are also relatively less number of paying guest facilities in the city. The foreign tourists arriving in Pushkar during the Fair invariably stay in the tents. Their duration of stay is nearly 2 days. During the Pushkar Fair close to 750 tents are put up by RTDC and other private hotels. These cater to approx. 2100 people.
- Based on seasonality factor tourist arrivals into the city and the stay patterns the average bed nights required in the city are close to 850, indicating occupancy of 42%. During the fair, an overall shortage in the bed capacity is felt. However, this is taken care by tented accommodation and by diverting some of the crowd to Ajmer.
- **Other Locations**: Besides the above there are Heritage properties in the region; namely the 51-room Kuchaman Fort Hotel (100 Kms from Ajmer), the 27-room Roopangarh Fort (25 Kms from Ajmer), 15-room Phool Mahal Palace at Kishangarh (27 Kms from Ajmer), etc. These places offer luxury accommodation catering primarily to foreign groups.

6.7.25 For the Merwara- Marwar circuit, the present accommodation availability at an aggregate level is inadequate for the present tourist arrivals. However, since there is a distribution of tourists from Ajmer / Pushkar, the capacity is enough to accommodate the halting tourists.

6.7.26 The Merwara–Marwar circuit lacks in luxury category hotels. Trends point towards the change in the profile of the arriving tourists at Ajmer / Pushkar requiring availability of luxury hotel rooms in the places.

On-going Hotel Projects

6.7.27 There are no major hotels projects proposed for the circuit. A list of smaller hotel projects in the region is provided in Appendix 6B.

Wayside Facilities

6.7.28 The current RTDC Midways / Wayside facilities that exist along the various tourist relevant routes in the Merwara - Marwar circuit are given in Exhibit 6.69

Exhibit 6.69

Midway facilities by RTDC in Merwara–Marwar Circuit

District	Place	Type/ Management	Route Catered to
Ajmer	Kishangarh	Midway	Jaipur-Ajmer (NH8)
Jaipur	Dudu	Midway	Jaipur-Ajmer (NH8)
Nagaur	Merta	Wayside Facility	Junction between Ajmer, Pali and Nagaur
Pali	Bar	RTDC-Midway	Ajmer-Jodhpur Road (Between Beawar and Raipur on State Highway)
Bhilwara	Gulabpura	Midway	Bhilwara-Ajmer State highway (part of the Mumbai – Delhi route via Ahmedabad, Udaipur, Chittaurgarh, Ajmer and Jaipur)

Wayside Facility Gaps

6.7.29 Given the small expanse of the circuit, most tourist movement within the circuit takes place from Pushkar and Ajmer (11 Kms). As such, there is no requirement of wayside facilities within the circuit. Tourist movement by road to other locations in the circuit is too insignificant to warrant a new wayside facility.

6.7.30 Presently, there are no plans for constructing any new wayside facility / motel in the Merwara - Marwar circuit.

New Projects: Wayside facilities

6.7.31 Being the central region of Rajasthan and because of its good road connectivity with other circuits, it is important to provide for wayside facilities along the main roads connecting the Merwara – Marwar circuit to other circuits.

6.7.32 The midway at Gulabpura would gain significance after the main national highway NH-8, which connects Delhi to Bombay via Jaipur, Ajmer, Udaipur and Ahmedabad is converted into a 4 lane highway under the Golden Quadrilateral project of NHAI. In the long term further augmentation of the midway to cater to heavier traffic would be required.

Tourist Offices

6.7.33 Rajasthan Tourism has tourist offices and kiosks at Ajmer, Pushkar and Nagaur in the Merwara – Marwar circuit as indicated in Exhibit 6.70

Exhibit 6.70

Tourist Information Offices in Mewara-Marwar Circuit

Sr. No.	District	TRC / TIB
1	Ajmer	TIB, Hotel Khadim, Ajmer TIB, Railway Station, Ajmer TIB, Pushkar
2	Nagaur	TIB, Nagaur

Note: At some of the places the tourist information desk is located in the RTDC hotel premise

Tourist Offices Gaps

6.7.34 Currently there is no Tourist Information office at Merta. It is recommended that a small tourist information kiosk is setup in the town.

Development of Tourist Spots / Tourist Site Enhancement

6.7.35 Works that need to be undertaken on a priority basis in Pushkar are cleaning and maintenance of Pushkar ghats, development of new parking space and construction of pedestrian footpaths along the road from the Brahma Temple to the ghats.

6.7.36 Similarly in Ajmer, works for clearing the approach road to the shrine, wastewater management in the area around the shrine, etc. need to be undertaken to ease tourist movement in the walled city.

6.7.37 Baghera, situated 107 Kms. South-east of Ajmer, is known for its archaeological sites, lakes, temple ruins. This place has the potential to be developed further as an important tourist destination for day excursions from Ajmer / Pushkar. The location would also be accessible enroute Hadoti circuit from Merwara–Marwar circuit.

6.7.38 With its excellent location outside the city, availability of water source and its present structure, Foy Sagar Lake at Ajmer could be an ideal location for landscaping and developing gardens.

Ongoing Projects

6.7.39 Exhibit 6.71 provides the list of developmental works being carried out in the Merwara-Marwar Circuit under the central Government plans.

Exhibit 6.71

Developmental Works in the Merwara - Marwar Circuit

District	Name of the Project	State/ CSS	Total Cost (Rs. Lakhs)	Executing Agency	Status
Ajmer	General toilets and development of lawns at Akbar ka Quila, Ajmer	CSS	5.00	A & M	Ongoing
	Integrated development of place of pilgrimage – Pushkar Ghats	CSS	58.62	A & M	Ongoing
	Integrated development of Vishram Sthali on Pushkar Road, Ajmer	CSS	93.39	RTDC	Ongoing
	Upgradation of Hotel Khadim, Ajmer	CSS	11.13	RTDC	Ongoing

District	Name of the Project	State/ CSS	Total Cost (Rs. Lakhs)	Executing Agency	Status
	Maintenance of Taragarh Fort, Ajmer	CSS	14.00	A & M	Ongoing
	Shilpgram at Tourist Village, Pushkar	CSS	27.50	RTDC	Proposed
	Landscaping work at Adhai-din-ka-Jhonpra, Ajmer	CSS	5.00	ASI	Proposed
	Development of Baradari at Anasagar, Ajmer	CSS	20.00	A & M	Proposed
	Construction of TRC, Ajmer	CSS	40.00	RTDC	Proposed
	Conservation of Malkot Fort, Merta City, Nagaur	CSS	25.00	A & M	Proposed
	Conservation of Meera Mahal and Becha Kund, Merta city	CSS	20.00	A & M	Proposed
Nagaur	Conservation and development of Amar Singh Rathore's Cenotaphs, Nagaur	CSS	20.00	A & M	Ongoing

Sanctuaries

6.7.40 There are no wildlife sanctuaries in the Merwara–Marwar circuit.

Tourism products

6.7.41 The DoT has identified specific tourism products for the circuit. These are Palace on Waves (at Ana Sagar), Amusement parks, Ropeways (Savitri Mandir, Pushkar and Taragarh, Ajmer), etc. have been identified by the DoT. Besides, the region also can develop other tourism products such as artists' village and safaris.

Summary of Infrastructure in the Merwara-Marwar Circuit

6.7.42 Exhibit 6.72 provides a summary of the infrastructure in the Merwara-Marwar circuit.

Exhibit 6.72

Tourism Relevant Infrastructure in Merwara-Marwar Circuit

Category	Current Status	Potential for Development		
		Short Term	Medium Term	Long Term
Connectivity Infrastructure	Fairly well developed	✓	✓	✓
		In line with tourist traffic		
Accommodation	Fairly developed	✓	✓	✓
		In line with tourist traffic, Need for mid-range facilities		
Midway/ Wayside Facilities	Adequate	✓		
Tourist Offices	Adequate	✓		
Others (Recreational Facilities, Shopping Facilities, etc)	Not developed	✓	✓	✓
Monuments/ Site Enhancement	Developed	✓	✓	
Sanctuaries/ Eco-Tourism	Not present			
Tourism Products (Rural Tourism, Resort Tourism, Health Tourism, etc)	Not developed	✓	✓	✓

Evaluation of Potential for Tourism Growth and Traffic Forecast Assumptions

6.7.43 The evaluation of the Merwara-Marwar circuit from the viewpoint of potential for tourism growth in the future is based on various factors as outlined in Exhibit 6.73

6.7.44 The Merwara-Marwar Circuit, which consists of the two pilgrim towns of Ajmer and Pushkar, is very popular amongst the domestic tourist. Merta, which is also a part of the circuit, is relatively less visited by the tourists.

6.7.45 Tourist arrival at these locations is highly concentrated during the two annual events (Pushkar Fair and Urs at Ajmer). Being large urban agglomerations, Ajmer and Pushkar are constrained by their carrying capacity. As such, the circuit offers limited diversity for the tourist. In terms of future development also, the region offers little potential in terms of new locations or innovative tourism products.

Exhibit 6.73
Merwara- Marwar Circuit: Evaluation of Potential for Tourism Growth

	Low---------High	Comments
Inventory of existing attractions		Pilgrim circuit in all respects
Diversity of existing attractions		Pilgrim places, lakes, forts
Number of unique attractions		Dargah of sufi saint Khwaja Moinuddin Chisthi, the only Brahma Temple in India, Pushkar Festival
Potential for promoting new locations and tourism products[1]		New attractions: Kishangarh, Roopangarh, Nagaur, Merta New tourism products: Ropeways, water sports
Prima facie Tourism Potential based on attractions		
Present Connectivity		Good road connectivity with Delhi via Jaipur and with other circuits in the state. Ajmer an important junction on Western railway. Jaipur (130 km) is the closest airport
Core Tourism Infrastructure[2]		
Opportunity for increasing the tourist season		High: Perennial tourism activity, though highly concentrated during the annual Urs (at Ajmer dargah) and the Pushkar Festival
Carrying capacity		Issue of carrying capacity at Ajmer (amongst top 5 populous cities in Rajasthan) and also at Pushkar because of the layout of the old cities
Potential for Tourism growth		

6.7.46 Based on this assessment the forecast growth rates for the major locations within the Merwara - Marwar circuit are as given below in Exhibit 6.74

Dargah of Khwaja Moin-ud-Din Chishti, Ajmer - Attracts close to 14 lakh tourist within a year - Highest in the state

Adhai Din Ka Jhonpra, Ajmer - Renowned for its ornate calligraphy

Exhibit 6.74

Merwara-Marwar Circuit – Forecast Growth Rates in Tourist Arrivals

Location	Tourist category	Short Term	Medium Term	Long Term
Ajmer	Domestic	1%	5%	6%
	Foreign	5%	5%	6%
Pushkar	Domestic	6%	5%	5%
	Foreign	7%	5%	6%

Note: Short term growth rates are based on 'average' tourist arrival figures from 1997-2001. This has been done to discount the irregularities in tourist arrivals in the year 2001

6.8 BRIJ MEWAT CIRCUIT

Overview of the Circuit

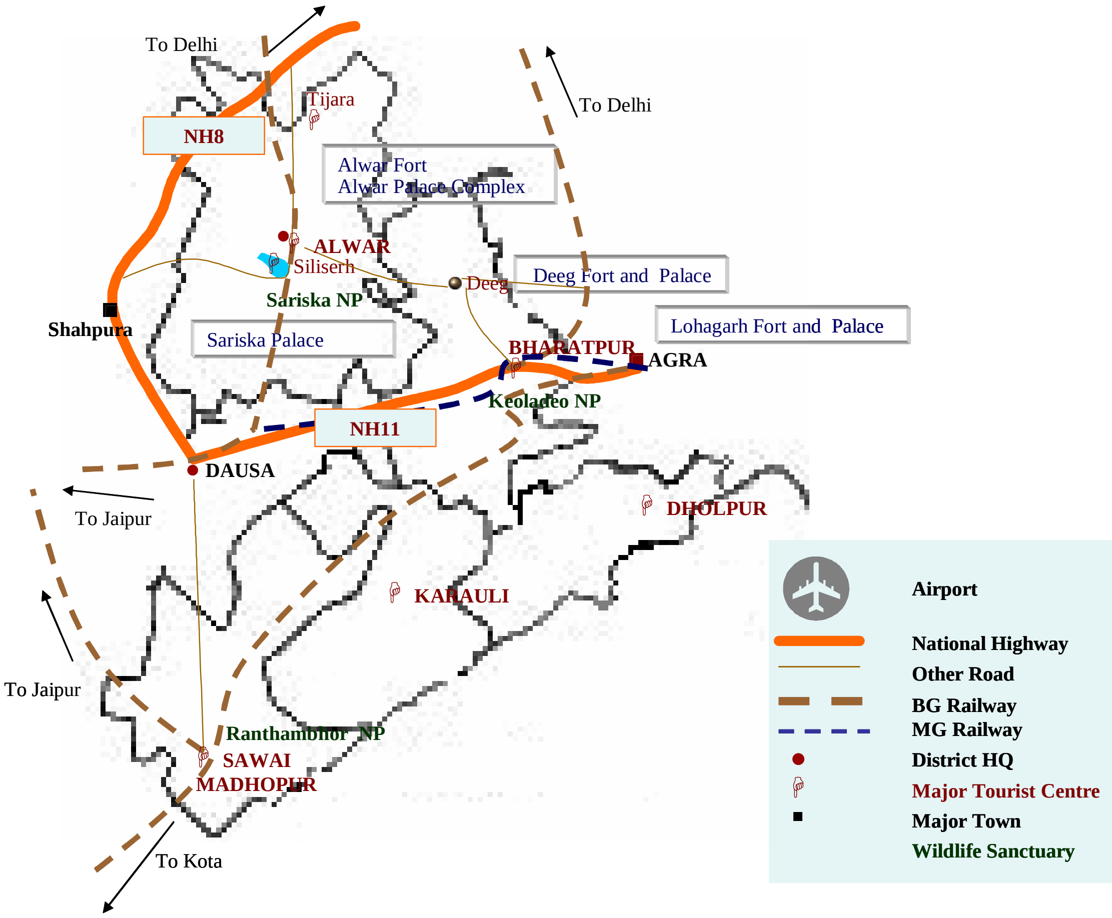
Background

6.8.1 The Brij Mewat circuit covers locations bordering Delhi, Uttar Pradesh, Madhya Pradesh, Sariska, and Bharatpur. Other places in the circuit include mainly Alwar, Deeg, Karauli and Sawai Madhopur. The circuit is most famous for its Keoladeo National Park, Sariska National Park and Ranthambhor National Park and is very popular with wildlife enthusiasts. The region also has a fair share of places of historic and archaeological importance in the areas. Although termed as a circuit these tourist locations are covered as daily excursions from Jaipur or enroute Jaipur from either Delhi or Agra. The Brij Mewat region is constituted of three separate sub-circuits, namely, Alwar-Sariska, Bharatpur-Deeg and Sawai Madhopur

6.8.2 Dholpur and Karauli in the Brij Mewat circuit are particularly known for their fairs and attract a large number of domestic pilgrimage tourists. A map of the Brij Mewat tourism circuit is provided in Exhibit 6.75

Exhibit 6.75

Map of the Brij Mewat Tourism Circuit



Geography and Topography

6.8.3 The circuit is nestled between cluster of small hills of the Aravali range. The southern and eastern part of the circuit, bordering Uttar Pradesh has large areas under wetlands, locally called as Orans. The tourist arrivals at the locations in the circuit are largely during the winter months from October to February.

6.8.4 The Alwar-Sariska sub-circuit is towards the North bordering Delhi. Bharatpur-Deeg is towards the East (54 Kms from Agra), whereas Sawai-Madhopur-Ranthambhor lies towards the South. Karauli and Dholpur lie between the Bharatpur and Sawai Madhopur sub-circuits.

Travel links

6.8.5 The nearest airlink for Alwar region is Jaipur (148 Kms) and Delhi (165 Kms). Bharatpur is closest to Agra (56 Kms), and can also be accessed from Jaipur (176 Kms). Similarly, Sawai Madhopur is closest to the Jaipur airport (165 Kms). Dholpur and Karauli are almost equidistant from Agra and Jaipur.

6.8.6 The region is well connected by rail. Alwar, Bharatpur and Sawai Madhopur are connected by broad gauge line with regular train services connecting them with Delhi and other major cities in Western and Central India.

6.8.7 Bharatpur is connected by NH11 to Agra and Jaipur. Alwar is 80 Kms off the Delhi Mumbai highway (NH3) whereas Sawai Madhopur is connected to Jaipur and other cities such as Kota, Tonk and Dausa by state roads.

6.8.8 Thus, overall the region is well connected with major cities in Rajasthan as well as with major tourist cities in the north India such as Delhi and Agra, and also has excellent rail and road-transport services.

Major Tourist Spots and Attractions

6.8.9 The main attractions in the Brij Mewat Circuit are the National Parks at Sariska, Bharatpur and Ranthambhor. The Brij Mewat Circuit (especially Sariska and Bharatpur) is also popular as a weekend tourist destination for Delhi and the National Capital Region (NCR).

6.8.10 The main attractions in the region are given in Exhibit 6.76

Exhibit 6.76

Major Tourist Locations in Brij Mewat Circuit

District	Major Attractions	Major Day-excursions	Major Events
Alwar	Alwar (1) Bala Qila- The Alwar fort (2) Alwar Palace Complex- Palace, Centotaphs, Tanks (3) Vijay Mandir Palace (4) Purjan Vihar Gardens (5) Hope Circus- architectural monument Sariska (1) Sariska Palace (2) Tal Vrakhsha Temples	(1) Jaisamand Lake (2) Sariska wildlife sanctuary and Tiger reserve (3) Kankwari, Tehla and Kushalgarh forts in the Sariska WLS	Holi, Gangaur and others Alwar Utsav (February)

District	Major Attractions	Major Day-excursions	Major Events
	Siliserh Siliserh Lake Palace		
Bharatpur	Bharatpur (1) Lohagarh fort- Palaces, Museum, Towers	(1) Keoladeo Ghana National Park (2) Deeg Palace (35 Kms)	
Sawai Madhopur	Sawai Madhopur (1) Ranthambhor Fort- Palaces, Cenotaphs (2) Ranthambhor National Park (3) Amareshwar Mahadev Temple (4) Bhairon Temple (5) Chamatkar Jain Temple	Ex-Sawai-Madhopur (1) Tonk (90 Kms) (2) Kakod fort (22 Kms) (3) Hati Bhata (32 Kms) (4) Shri Mahaveerji (110 Kms) (5) Chauth ka Barwada Temple (25 Kms) (6) Rameshwar Ghat (60 Kms)	Mahaveerji Fair (March-April)
Karauli	Karauli (1) Palace, Lake, Temples (Madan Mohanji and Kalyanji) (2) Kela Devi Temple- Karauli		Kela Devi Fair (April)
Dholpur	Dholpur (1) Shergarh Fort (2) Ghanta Ghar (3) Van Vihar- Ramsagar wildlife sanctuary (4) Talab Shahi Lake (5) Machkund (pilgrim place)		

Main Tourist Locations and Attractions

6.8.11 Brij Mewat circuit is most popular for its wildlife experience. The national parks at Sariska, Bharatpur and Ranthambhor figure on the tour itinerary of most foreign tourists visiting Agra/ Jaipur/ Golden Triangle. Besides the three national parks, the circuit also has other attractions, most notable amongst them being the palaces at Sariska and Deeg.

6.8.12 Alwar-Sariska sub-circuit also has some beautiful palaces and lakes. Siliserh lake palace is a weekend getaway for tourist from Delhi. Similarly, Lake Jaisamand near Alwar is also a popular picnic destination during the rains.

6.8.13 In Bharatpur, the Lohagarh fort, which lies in the town, is usually visited alongwith Keoladeo National Park. It houses some beautiful palaces and the Iron Tower (Lohastambh). Similarly, Sawai Madhopur has some interesting tourist attractions such as the Kakod fort and the Hati Bhata (huge elephant carved out of one stone).

Less Frequented Tourist Locations

6.8.14 The Brij Mewat circuit alongwith all its sub-circuits are mainly visited for their National Parks. As such, other attractions remain largely unexplored.

- **Sawai Madhopur**: Amareshwar Mahadev Temple, Bhairon Temple, Chamatkar Jain Temple, Chauth ka Barwada Temple, Rameshwar Ghat
- **Karauli district**: Numerous monuments, buildings and temples inhabit the verdant surroundings of Karauli. Kela Devi temple is mostly visited during fairs. Karauli fort and palaces, and temples of Madan Mohanji and Kalyanji are less frequented by the pilgrim tourists.

- **Dholpur district**: Machkund (pilgrim centre) is popular amongst all tourist locations in the district. Other places like Ghanta Ghar, Talab Shahi Lake, Shergarh Fort, Van Vihar and Ramsagar wildlife sanctuaries are hardly visited by the tourists.

6.8.15 Given their connectivity and their relative unexplored nature, Karauli and Dholpur have good tourism potential. They present a good opportunity to be developed in an integrated manner with either Ranthambhor and/ or Bharatpur.

Existing Tourist Traffic Trends

6.8.16 The major tourist locations in the Brij Mewat region include Alwar, Sariska, Siliserh, Bharatpur and Sawai Madhopur. The three National Parks in the circuit together account for over 1.5 Lakhs tourist. Bharatpur ranks first in terms of tourist arrivals in the circuit, followed by Alwar. However, in terms of growth Alwar has shown an increase in domestic as well as foreign tourist vis-à-vis Bharatpur, which has registered a decline in both domestic and foreign tourists. Similarly, Ranthambhor has gained popularity in the past 2 years after the much publicised visit of the American President.

6.8.17 Exhibit 6.77 gives the tourist traffic trends for Brij Mewat region. The salient features are provided in the subsequent paragraphs.

Exhibit 6.77

Tourist Arrivals in the Brij Mewat Region

Tourist Location	Category of Tourist	1996	1997	1998	1999	2000	2001	CAGR	Comments
Alwar	Indian	49751	50747	47360	53958	76934	100995	15%	Proximity to Delhi Entry point for Jaipur (via Tijara temple town) Good inventory of historical attractions
	Foreign	2427	1837	12465	7934	8235	3334	7%	
	Total	52178	52584	59825	61892	85169	104329	15%	
Sariska	Indian	4876	5864	10706	11949	15559	11817	19%	Proximity to Delhi-Weekend getaway for domestic tourist Eco-tourism coupled with heritage and history for foreign tourists
	Foreign	1193	1280	8325	9551	10854	12351	60%	
	Total	6069	7144	19031	21500	26413	24168	32%	
Siliserh	Indian	1779	1780	3956	1981	2036	1843	1%	Proximity to Delhi-Weekend resort and picnic spot for domestic tourist
	Foreign	480	394	404	254	206	120	-24%	
	Total	2259	2174	4360	2235	2242	1963	-3%	
Bharatpur	Indian	118479	118310	112394	104247	118079	101181	-3%	Must visit location on the Golden Triangle route from Agra to Jaipur. However failing in popularity
	Foreign	30323	16265	14638	10626	11262	9553	-21%	
	Total	148802	134575	127032	114873	129341	110734	-6%	
Sawai Madhopur	Indian	67693	77238	84961	62080	89391	50598	-6%	Increasing popularity of the tiger reserve amongst the domestic as well as foreign tourists (Gained more prominence after the visit of the American President)
	Foreign	6399	4704	8602	6750	8869	10064	9%	
	Total	74092	81942	93563	68830	98260	60662	-4%	

Source: DoT, Rajasthan

Domestic Tourist Traffic

- The important locations where the domestic tourist visits are Alwar, Bharatpur and Sawai Madhopur. At a sub-circuit level, domestic tourist arrivals have shown an increase in Alwar-Sariska region, whereas those in Bharatpur and Sawai Madhopur have registered a decline. Tourist arrivals in Sariska have grown at 19%, albeit on a smaller base, whereas Alwar have grown by 15% on a larger base. Siliserh which is restrained by its carrying capacity has shown a steady decline in tourist arrivals

Foreign Tourist Traffic

- In terms of foreign tourist arrivals, Sariska has registered a growth of 60% in the last five years. Other locations such as Sawai Madhopur and Alwar have also registered an increase in the category, however, the traditionally favourite Bharatpur has recorded a decline of 6%, largely due to tourists moving to either Sariska or Ranthambhor from Agra enroute Jaipur. Siliserh which receives only a few foreign tourists has also shown a sharp decline in the recent years

Connectivity Infrastructure

6.8.18 Travel links for various tourist locations/ spots in the Brij Mewat region are given in Exhibit 6.78

Exhibit 6.78

Travel Connectivity of Tourist Locations in the Brij Mewat Region

Sr. No.	Towns/ Tourist Locations	Connectivity	Comments
1	Alwar-Sariska	Air Delhi airport (165 Kms) Jaipur airport (148 Kms) Rail Alwar : Broad Gauge Road (180 Kms from Shahpura on NH8)	Delhi at a distance of 3-4 hours by road
2	Bharatpur	Air Delhi airport (185 Kms) Agra airport (56 Kms) Jaipur airport (176 Kms) Rail Bharatpur and Bayana: Broad Gauge Bharatpur-Agra Metre Gauge Road NH11	Falls on the Golden Triangle route
3	Sawai Madhopur	Rail Sawai Madhopur : Broad Gauge Road SH	Good rail connectivity with Jaipur, Bharatpur and Kota Could be an entry point for the wildlife circuit (Ranthambhor-Keoladeo-Sariska)
4	Dholpur	Road (NH3)	

Air

6.8.19 As mentioned earlier, the region has good air connectivity links being close to Delhi, Jaipur and Agra.

6.8.20 Delhi has an international airport and has good flight services linking it to all major cities in the world, in India and in Rajasthan. Presently, Jaipur airport handles 12 flights in a week, of which 9 are daily flights. Jaipur has direct connectivity with Mumbai, Delhi, Kolkata, Jodhpur and Ahmedabad and handles a total of 3 Lakhs passengers per annum. The airport is being upgraded to an international airport. Flight services to Dubai have also commenced since February 2002. Agra has three flights in a week to/ from Delhi and is also connected to Varanasi and Khajurao.

6.8.21 Thus, the region has good air connectivity links. Given the coverage patterns of the locations in the region, the present links and services are adequate to cater to the current demand. However, in the future, flight services from 1-2 cities in South India need to be started to bring the international and domestic tourists to Rajasthan.

6.8.22 The Jaipur airport is being upgraded to an international airport, and is expected to receive Rajasthan-destined tourist directly in the future.

Rail

6.8.23 The region has very good rail connectivity, in fact, all the important tourist locations in the region are connected by broad gauge rail to Delhi and other cities. (e.g., Bharatpur, Sawai-Madhopur, Dholpur, etc.)

6.8.24 Alwar falls on the main Delhi-Ahmedabad trunk line. There are 4 daily services, apart from other weekly services, from Delhi to Alwar and from Jaipur to Alwar. Similarly, there are 2 daily services connecting Alwar to Ahmedabad. For intra-state travel, there are daily services linking Alwar to other important tourist locations in Rajasthan such as Jodhpur and Abu Road.

6.8.25 Bharatpur has broad gauge as well as metre gauge connectivity. It falls on the Delhi-Mumbai broad gauge trunk line and is also connected to Agra via metre gauge. There are four daily services linking Bharatpur to Delhi and three to Mumbai. Similarly, there are daily services linking Bharatpur to other important tourist cities in Rajasthan such as Sawai Madhopur and Kota. Sawai Madhopur also falls on the same Delhi-Mumbai trunk line and is linked to Delhi, Mumbai and Baroda by regular daily and weekly services, including some express services.

Road

6.8.26 The Brij Mewat region is also well connected by road to places within and outside Rajasthan . Sariska is approx. 80 Kms from Shahpura, which lies on NH8. Similarly, there are state roads connecting Alwar to Delhi via Kishangarh. There are regular state transport services to Alwar from Delhi and Jaipur.

6.8.27 Bharatpur falls on NH11 (Jaipur-Agra) and has regular bus services from Agra and Jaipur. Private taxis are also available from the two cities. The approach road to Sawai Madhopur from Jaipur ex-Tonk is a state road. Bus services from Jaipur are not very satisfactory, and more often the preferred mode of transport is the train linking the two cities. Taxis are used for local travel.

6.8.28 Roads within the National Parks are usually unsurfaced and as such not motorable. However, the regulations of the State Forest Dept. prohibit any kind of construction activity (including roads) inside the National Parks and wildlife sanctuaries.

6.8.29 A list of on-going/ proposed projects in the region is given in Appendix 6A.

Tourism Related Direct Infrastructure

Accommodation

6.8.30 The main stay locations in the region are Sariska, Bharatpur and Sawai Madhopur. Tourist movement trend shows that the Alwar-Sariska sub-circuit is mostly covered as day excursion from Jaipur. The Bharatpur-Deeg sub-circuit is either covered as a part of the Golden Triangle or a day excursion from Jaipur/ Agra.

6.8.31 The foreign tourists spend at least a day at the NPs if they form a part of their tour itinerary. In Sariska/ Ranthambhor their stays are usually extended upto 3 days. On the contrary, only a few domestic tourists stay more than a day at these places. More often these places are a part of the day excursion or the domestic tourists.

6.8.32 Exhibit 6.79 provides an overview of hotel accommodation in the Brij Mewat Circuit region. As seen from the Exhibit, the Brij Mewat circuit has a capacity of approx. 1025 rooms (approx. 1930 beds). As expected, around 60% of this capacity is concentrated around the three National Parks.

Exhibit 6.79

Accommodation in Brij Mewat Tourism Circuit- Current Status

Sr. No.	District	Location	No of Units	No. of Rooms	No. of Beds	Of which RTDC bed capacity
1	Alwar	Alwar Hotels PG Accommodation	 15 11	 225 30	 400 50	Meenal (12)
		Sariska	5	185	350	Tiger Den (66)
		Siliserh	1	10	20	Lake Palace Hotel (20)
		Neemrana	1	42	72	
		Behror	3	72	150	Motel Behror (44)
2	Bharatpur	Bharatpur Hotels PG Accommodation	 12 11	 140 33	 260 66	Hotel Saras (63)
		Deeg				Motel Deeg
		Peharsar (23 Kms from Bharatpur on Jaipur-Agra road)	1	23	42	
3	Sawai Madhopur	Sawai Madhopur/ Ranthambhor	13	236	460	Vinayak (18) Jhoomar Baori (24) Hotel Castle (12)
		Savti	1	11	22	
4	Karauli	Karauli	1	21	41	
	Total		74	1025	1933	8 (247)

- **Alwar-Sariska**: Alwar-Sariska together has a combined capacity of around 410 rooms and around 750 beds. Out of these, a large number of rooms (~35%) is in the luxury segment. The rest is divided between mid-range and economy segment, with the latter having a 40% share in the total number of rooms. In addition, to the hotel rooms paying guest facilities are available, which provide an estimated additional 30 rooms and about 50 beds. Apart from these, there are railway retiring rooms, circuit houses and Government Dak bungalows that also offer alternative accommodation facilities.

- Based on the seasonality and tourist arrivals, the average bed nights required in Alwar-Sariska are close to 500, indicating occupancy of 65%. However, it is estimated that during peak time the occupancy of hotels in Alwar and Sariska would be close to 85%. Thus, there is currently no shortfall in the hotel room availability. However, given the increasing number of domestic tourist arriving in the area, there might be a slight shortfall in the mid-range hotels. Similarly, in Sariska, given the fact that the foreign tourist are growing at a very high rate, there might be a scope for development of some heritage properties into hotels. Also, Alwar-Sariska sub-circuit offers excellent opportunity to be developed as a weekend getaway destination for domestic tourists especially from the NCR. Accommodation catering to this category of tourists would be needed in the future. This would include more resorts and budget hotels/ tourist bungalows.

- **Bharatpur:** Bharatpur has a capacity of approx. 180 rooms and 330 beds. Based on the seasonality and tourist arrivals, the theoretical bed nights required in Bharatpur are close to 500, indicating a shortfall in capacity. However, since most of the tourists arriving into Bharatpur are transit tourists or who have taken a day's excursion from Jaipur or Agra. This capacity is sufficient to meet the demand for hotel accommodation. Besides hotels, there is an additional paying guest capacity of 40 rooms and around 65 beds in the town, which makes up for any shortfall in the capacity.
- **Sawai Madhopur:** Sawai Madhopur has an estimated hotel capacity of close to 235 rooms and 460 beds. Over 80% of this capacity is concentrated in the economy segment. Given the increasing popularity of Sawai-Madhopur with foreign tourists, there might be a shortfall in the luxury and mid-range category of rooms.

Ongoing Hotel Projects

6.8.33 At present there are no proposed large hotel projects in the Bharatpur-Mewat circuit. However, DoT has approved several small hotel and resort projects in the Brij Mewat region including 4 in Alwar, 1 in Bharatpur and 14 in Sawai Madhopur. A list of such projects is provided in the Appendix 6B.

Wayside Facilities

6.8.34 The current RTDC Midways / Wayside facilities that exist along the various tourist relevant routes in the Brij Mewat circuit are given in Exhibit 6.80

Exhibit 6.80

Midway facilities by RTDC in Brij Mewat Circuit

District	Place	Type/ Management	Route Catered to
Alwar	Talbriksh	Wayside Facility	Alwar-Delhi (SH)
	Behror	Midway Motel	Jaipur-Delhi (NH8)
Bharatpur	Deeg	Midway Motel	Deeg
Dholpur	Dholpur	RTDC-Midway	Bombay-Agra Highway (NH3)

Wayside Facility Gaps

6.8.35 Jaipur to Sawai Madhopur route is 162 Kms by road. There are two roads that one can take from Jaipur to Sawai Madhopur, one Jaipur-Dausa-Sawai Madhopur and the other Jaipur-Tonk-Sawai Madhopur. Presently there are no wayside facilities on any of these routes. Although, the present traffic on these routes is not very significant, a small wayside facility/ midway on each of these routes is recommended

6.8.36 There are several ways, which the tourists can take to come to Alwar. Although, Alwar-Behror-Delhi via NH-8 route has a midway at Behror, there is no other wayside facility between Alwar-Delhi via Kishangarh or Tijara. Given that these routes may see an increased traffic in the future, a small wayside facility at Kishangarh is recommended

6.8.37 Presently, there is a midway planned on the Delhi-Sariska road at Bhiwari. The total cost of the project is Rs. 25 Lakhs and it is being implemented by RTDC.

Tourist Offices

6.8.38 Rajasthan Tourism has tourist offices and kiosks at several places in the Brij Mewat region as shown in Exhibit 6.81

Exhibit 6.81

Tourist information offices in Brij Mewat Circuit

Sr. No	District	TRC / TIB
1	Alwar	TIB, Alwar
2	Bharatpur	TRC, Hotel Saras, Bharatpur TIB, Bharatpur
3	Sawai Madhopur	TRC, Sawai Madhopur TIB, Railway Station, Sawai Madhopur

6.8.39 Given the pattern of tourist movement in this circuit (i.e. ex-Jaipur, or ex-Agra), the current tourist information offices in the region are adequate.

Development of Tourist Spots / Tourist Site Enhancement

6.8.40 One of the important monuments in the Alwar-Sariska sub-circuit is the Alwar palace. One of the most magnificent palaces in the Western part of Rajasthan, this palace now houses several government offices. Alwar palace has a tremendous potential to be developed as a tourist attraction. In fact, it would be one of the first palaces to be visited by a tourist if he approaches via the Delhi-Tijara-Alwar route. Maintenance of this palace is a priority work. The cenotaph of Moosi Rani and the Sagar tank in the palace complex also need repairs and conservation work. The main monument in Sariska, namely, the Sariska Palace is now converted into a hotel and is maintained very well.

6.8.41 The fort area of ***Bharatpur*** and ***Deeg*** also requires conservation and maintenance. Similarly, the monuments in ***Sawai Madhopur*** and ***Ranthambhor*** region require maintenance and restoration.

6.8.42 The developmental works being carried out in the region are provided in Exhibit 6.82

Exhibit 6.82

Developmental Works in the Brij Mewat Circuit

District	Name of the Project	State/ CSS	Total Cost (Rs. Lakhs)	Executing Agency	Status
Alwar	Upgradation of Hotel Behror	CSS	31.95	RTDC	Ongoing
	Upgradation of Lake Palace Hotel, Siliserh	CSS	36.68	RTDC	Ongoing
	Upgradation of Tourist Bungalow at Sariska	CSS	27.93	RTDC	Ongoing

District	Name of the Project	State/ CSS	Total Cost (Rs. Lakhs)	Executing Agency	Status
	Conservation of Moosi Rani Cenotaph/ Sagar Tank	CSS	20.00	UIT	Ongoing
	Refurbishment of Fateh Gumbaj	CSS	12.00	A&M	Ongoing
Bharatpur	Refurbishment of Deeg Fort	CSS	5.00	A&M	Ongoing
	General toilets and landscaping work at fort Museum	CSS	10.00	A&M	Ongoing
	Development of Kamra Khas	CSS	50.00	A&M	Ongoing
	Refurbishment of Kishori Mahal	CSS	25.00	A&M	Ongoing
	Conservation work of Deeg Palace	CSS	15.00	ASI	Proposed
	Cleaning and repairing of Sujanganga	CSS	50.00	UIT	Proposed
	Conservation of Fateh Burg	CSS	5.00	A&M	Proposed
Sawai Madhopur	Upgradation of Vinayak Bungalow	CSS	30.57	RTDC	Ongoing
	Approach to Delhi gate and opening at Ranthambhor Fort	CSS	30.00	ASI	Proposed
Dholpur	Toilet facilities at Machkund and Talab Shahi	CSS	1.88	A&M	Ongoing
	Conservation of The Palace	CSS	10.00	A&M	Proposed

CSS – Centrally Sponsored Schemes

Sanctuaries/ Eco tourism

6.8.43 The details about the NPs and wildlife sanctuaries in the Brij Mewat circuit are given in Exhibit 6.83

Exhibit 6.83

Sanctuary in Brij Mewat Circuit: Existing Status

Protected Area	Area (Sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access
Keoladeo National Park	29	• About 390 species of monsoon breeder, resident and migratory birds • Siberian cranes, otters, civet, hedgehog, fishing cat, jackal, etc.	At Ranthambhor • RTDC/ITDC hotels • Forest Resthouse • Private hotels	• On NH11, 55 Kms from Agra and 190 Kms from Jaipur
Ranthambhor National Park	392	• Tiger, leopard, sloth bear, crocodile, civet, chinkara, birds of prey, etc.	At Bharatpur • RTDC hotel • Forest Resthouse • Private hotels	• Jaipur – 180 Kms • Tonk – 90 Kms • Kota – 125 Kms
Sariska National Park	548	• Tiger, panther, neelgai,, hyena, sambhar, etc.	At Sariska • RTDC Hotel • Sariska Palace	• Alwar – 37 Kms
Keladevi W.L. Sanctuary	676	Tiger, panther, sambhar, sloth bear, cheetal, porcupine, etc.	At Jaipur • RTDC/ITDC hotel • Private hotels At Sawai Madhopur • RTDC hotel • Private hotels	• Karauli – 25 Kms • Jaipur – 144 Kms
Bund Baretha W.L. Sanctuary	199	Leopard, hyena, jungle cat, chital, sambhar, etc. Visit to Bharatpur	At Bharatpur • RTDC hotel • Forest Resthouse • Private hotels	• Bharatpur – 45 Kms
Ramsagar	34	Panther, chital, wild boar,		• Dhaulpur – 33

Protected Area	Area (Sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access
W.L. Sanctuary		neelgai, bear, etc.		Kms
Van Vihar W.L. Sanctuary	26	Insignificant fauna		• Dhaulpur
Kesarbagh W.L. Sanctuary	15	Insignificant fauna		• Dhaulpur

Ongoing and Proposed projects

6.8.44 The detail of the eco-tourism plans for the various wildlife sanctuaries and national parks in the region are as provided in Exhibit 6.84

Exhibit 6.84

Proposal for Development of Eco-Tourism at Keoladeo National Park

Sr. No.	Details of Work	Amount (Rs. Lakhs)
1	Keoladeo National Park Black topping of two nature trails in the Park Sapan Mori-Lala Pyara Kunda-to Choumara (3.8 Kms) Keoladeo Temple-Python point-Choumara Raising of Park Boundary Wall Publication of folder	118.80
2	Sariska National Park - Kankwari Fort - Tehla Fort - Kushalgarh Fort	36.00 12.00 14.00 10.00
3	Ranthambhor National Park	14.50
4	Keladevi Wildlife Sanctuary	14.50
	Total	**183.80**

6.8.45 The specific spots that are being developed in various sanctuaries are elaborated below:

- **Kankwari Fort**: This seventeenth century fort is located in the Tiger Reserve area of Sariska, Alwar. Natural forests of the Aravali Hill system surround the fort. Its location makes it an ideal site for campers and nature lovers. The fort is partly damaged and needs restoration. It is proposed to develop the area to make it suitable for night stay of visitors. Repair of approach road, restoration of three rooms for staying and construction of water harvesting structures along with boring for ground water is being proposed.

- **Tehla and Kushalgarh Fort**: These two small forts lie on the fringes of the Sariska Tiger Reserve. These structures are presently abandoned and do not have any resource for their development. The Tehla fort lies on top of the hill and if partly repaired it could serve as a surveillance post with wireless installations ideal of protection of wildlife. Repair of road from old nursery to Tehla fort is being proposed. Conversion of three rooms into a rest house is essential to provide accommodation to the tourists. Boring with pipeline is also being proposed to ensure water availability. Kushalgarh fort is a small fort perched on a small hillock on Sariska – Alwar road located at about 7 Kms form Sariska Tiger Project headquarters. This building can be used as a night shelter for tourists and back packers. For this repair and conversion into rest house / dormitory is being proposed. For water availability, boring is being proposed.

- **Khandar Fort**: Khandar fort is situated at a distance of about 35 Kms. from the New Sawai Madhopur town. Khandar forms the buffer area of the Project Tiger (Ranthambhor). The fort is situated on the top of a hill and is quite majestic. Trees of dhok are in abundance and the view from the fort of the surrounding areas is spectacular. At present a wireless station has been established at the fort to ensure protection of the wildlife. For providing night shelter to the tourists it is proposed that three rooms in the fort are repaired and supplied with basic furniture. Boring with pipeline is essential for ensuring water availability. Repair of approach road is necessary.

- **Udgir Fort**: Government of Rajasthan has transferred the Udgir Fort to the Forest Department in 1999. The fort is situated in the Keladevi Sanctuary in Karauli district. The area is rich in Dhok trees. It is necessary to repair the approach road. Two rooms inside the fort are proposed to be repaired and provisions for basic furniture and other amenities for the tourists are being proposed. Water harvesting structures / water holes near the fort are also being proposed.

Tourism Products

6.8.46 Apart from the current inventory of tourism attractions, the region has scope/ potential to develop new tourism products. Some tourism products such as ropeways (Moosi Rani Cenotaph-Alwar Fort), eco-tourism, etc. have been identified by the DoT.

6.8.47 The region can also develop other tourism products such as Golfcourse, Resort, Cultural Complex, Rural tourism in Karauli and Water Resorts / Water Sports in Siliserh.

Summary of Infrastructure in Brij-Mewat Circuit

6.8.48 Exhibit 6.85 provides a summary of the tourism relevant infrastructure in the Brij-Mewat Circuit.

Exhibit 6.85

Tourism Relevant Infrastructure in Brij-Mewat Circuit

Category	Current Status	Potential for Development		
		Short Term	Medium Term	Long Term
Connectivity Infrastructure	Fairly developed	✓	✓	✓
		In line with traffic growth		
Accommodation	Fairly developed	✓	✓	
Midway/ Wayside Facilities	Good	✓		
Tourist Offices	Adequate	✓		
Others (Recreational Facilities, Shopping Facilities, etc)	Not developed	✓	✓	✓
Monuments/ Site Enhancement	Fairly developed	✓		
Sanctuaries/ Eco-Tourism	Developed	✓	✓	✓
Tourism Products (Rural Tourism, Resort Tourism, Health Tourism, etc)	Developed		✓	✓

Evaluation of Potential for Tourism Growth and Traffic Forecast Assumptions

6.8.49 The evaluation of the Brij - Mewat circuit from the viewpoint of potential for tourism growth in the future is based on various factors as outlined in Exhibit 6.86

Exhibit 6.86
Brij - Mewat Circuit: Evaluation of Potential for Tourism Growth

6.8.50 The Brij-Mewat Circuit, which mainly consists of the three National Parks, is a popular destination for nature and wildlife enthusiasts. Sariska, Bharatpur and Ranthambhor are the presently the popular locations in the circuit. This circuit has excellent connectivity with the National Capital Region (NCR) and with Agra and Gwalior.

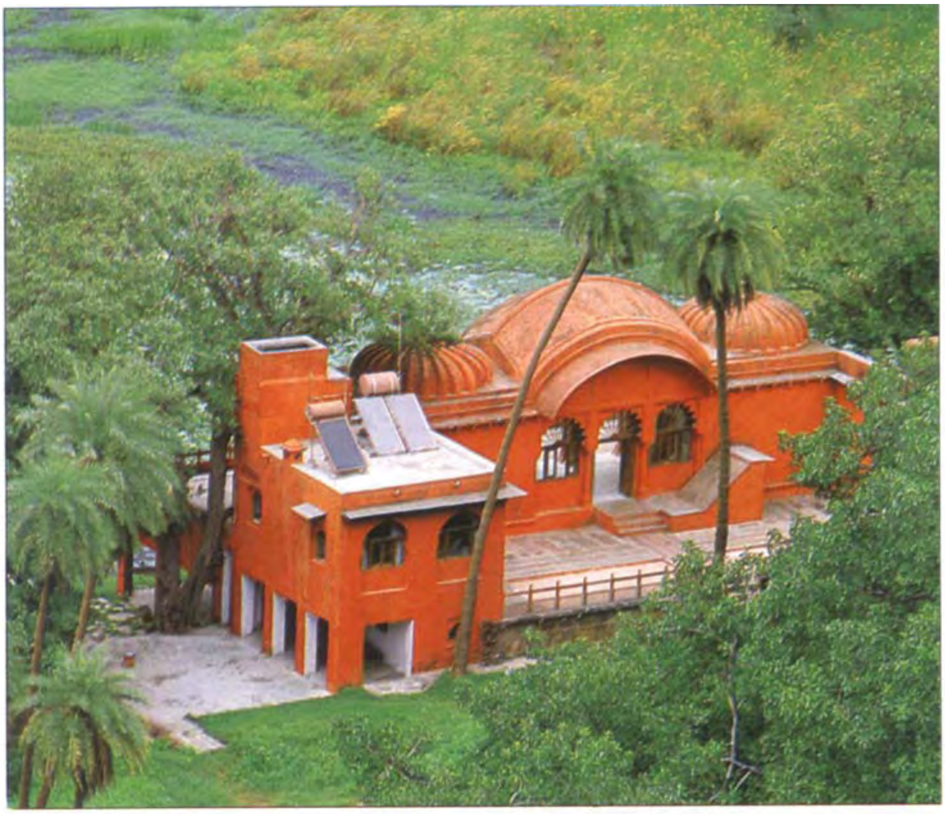
6.8.51 Places like Alwar, Siliserh and Deeg offer an excellent opportunity to be developed as weekend getaway destinations for tourists from the NCR. Tourism products like health resorts, water sports, naturopathy and eco-tourism could be developed at these places exclusively for the domestic tourists.

6.8.52 Based on this assessment the forecast growth rates for the major locations within the Brij - Mewat circuit are as given below in Exhibit 6.87

Musi Rani ki Chattri at Alwar Fort

Sariska Palace - A hunting lodge now converted to a Heritage Resort

Deeg Palace - Ideal for converting it into an open air auditorium for cultural programmes



Jogi Mahal - Resort in the heart of Ranathambhor National Park

Tiger at Ranathambhor National Park

Exhibit 6.87

Brij Mewat Circuit – Forecast Growth Rates in Tourist Arrivals

Location	Tourist category	Short Term	Medium Term	Long Term
Bharatpur	Domestic	4%	4%	8%
	Foreign	8%	7%	10%
S. Madhopur	Domestic	10%	4%	5%
	Foreign	8%	8%	8%
Alwar	Domestic	2%	5%	8%
	Foreign	21%	5%	10%
Sariska	Domestic	16%	10%	10%
	Foreign	20%	15%	12%
Siliserh	Domestic	6%	5%	6%
	Foreign	15%	2%	4%
Behror	Domestic	18%	5%	5%
	Foreign	37%	10%	11%

Note: Short term growth rates are based on 'average' tourist arrival figures from 1997-2001. This has been done to discount the irregularities in tourist arrivals in the year 2001

6.9 SHEKHAWATI CIRCUIT

Overview of the Circuit

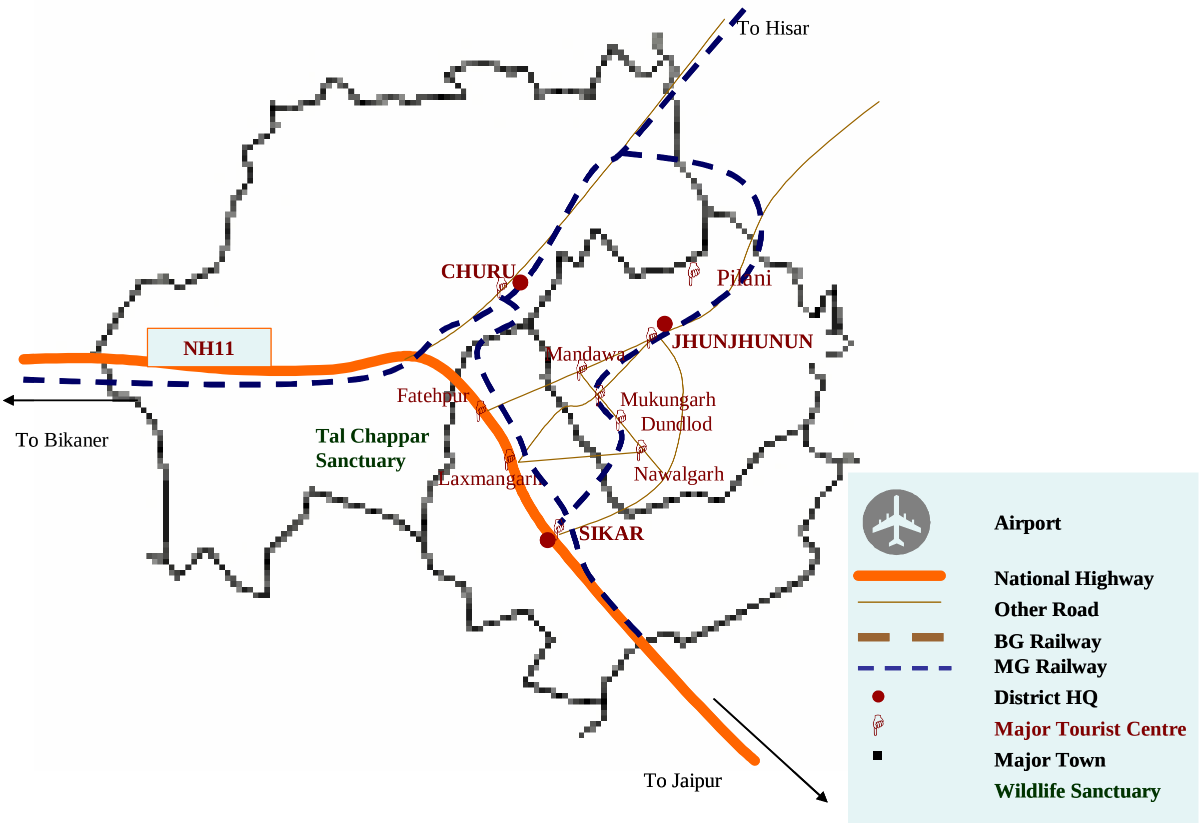
Background

6.9.1 The Shekhawati region includes the three districts of Churu, Sikar and Jhunjhunun in the north-eastern part of Rajasthan bordering Haryana. The region, known as the 'open art gallery of Rajasthan' is famous for its painted havelis.

6.9.2 A map of the Shekhawati region is provided in Exhibit 6.88

Exhibit 6.88

Map of the Shekhawati Circuit



Geography and Topography

6.9.3 Shekhawati is a semi-desert area bounded on two sides by the Delhi-Jaipur and Jaipur-Bikaner highways. Sikar lies north of Jaipur, while Jhunjunun in the north touches Churu district and the state of Haryana. Most of the painted towns and villages are concentrated in the west and the north of Shekhawati. Sikar with a population approx. 1.8 Lakhs is the largest town in the region. Other important cities in the region include the district headquarters of Jhunjhunun and Churu. The Shekhawati region is one of the most thickly populated regions in the state.

Travel Links

6.9.4 Jaipur Airport (located 110 Kms from Sikar) is the nearest airport to the Shekhawati region. Regular services are operational from Jaipur to major cities such as Delhi, Mumbai, Kolkata and Ahmedabad and to cities in the state like Udaipur and Jodhpur. A direct international flight also Jaipur to Dubai in the Middle East.

6.9.5 The Shekhawati region lacks a well developed rail network. Places like Jhunjhunun, Mukundgarh and Sikar are connected by Metre Gauge to Delhi, Jaipur and Bikaner. The Shekhawati Express runs between Delhi and Jaipur stopping at Jhunjhunun, Mukundgarh and Sikar. Sikar and Jhunjhunun are connected by road to Jaipur, Bikaner and Delhi.

6.9.6 The NH-11 (Agra-Bikaner) passes through important tourist towns like Sikar, Fatehpur, Lachhmangarh and Ratangarh. However, conditions of the roads connecting the tourist towns within the region are extremely poor.

Major Tourist Spots and Attractions

6.9.7 Exhibit 6.89 indicates the major tourist locations and attractions in the Desert circuit. The region has several tourist small towns famous for their painted havelis, though most of them are within lose distance of each other.

Exhibit 6.89

Major Tourist Locations in Desert Circuit

District	Major Attractions	Major Day-excursions	Major Events
Sikar	Sikar City (1) Biyani Haveli (2) Murarka Haveli (3) Somani Haveli (4) Sagarmal Sodhani Haveli (5) Madhav Niwas Kothi (6) Jubilee Hall (7) Fort (8) Jain temples	Lachhmangarh (1) Sawant Ram Chokhani Haveli (2) Mirijamal Kyala Haveli (3) Bansidhar Rathi Haveli (4) Kedia Haveli (5) Sanganeria Haveli Fatehpur (1) Ramgopal Mahavirprasad Haveli (2) Goenka Haveli (3) Hukumsichand Choudhri Haveli (4) Jalan Haveli (5) Bhartiya Haveli	Teej (July / August) Gangaur Festival (March/April)
Jhunjunun	Jhunjunun Town (1) Nar Singh Das Tibrewal haveli (2) Khaitan Haveli (3) Ishwar Das Modi Haveli (4) Khatri Mahal (Wind Palace) (5) Bihariji Temple	Nawalgarh (1) Aath (eight) haveli complex (2) Jodhraj Patodia Haveli (3) Bansidhar Bhagat Haveli (4) Chokhani Haveli (5) Hotel Roop Niwas Palace Churi Ajitgarh (1) Shiv Narain Nemani Haveli (2) Kothi Shiv Datt Haveli (3) Rai Jaganlal Tibrewal Haveli (4) Ram Rampratap Nemani Haveli Chirawa (5) Rai Bahadur Tulsian Haveli	Teej (July / August) Gangaur Festival (March/April)

District	Major Attractions	Major Day-excursions	Major Events
		(1) Nemani Haveli (2) Mangalchand Dalmia Haveli (3) Rarachand Keshardev Dalmia Haveli (4) Dulichand Kakrania Haveli (5) Bhola Ram Kakrania Haveli (6) Manoharlal Vaidh Haveli (7) Kakrania Well (8) Sehksaria Well <u>Dundlod</u> (1) Dundlod Fort (2) Goenka Haveli <u>Mukundgarh</u> (1) Mukundgarh Fort (2) Kanoria Haveli (3) Ganeriwala Haveli (4) Textiles and brasswork <u>Khetri</u> (1) Raghunath Temple (2) Bhopalgarh Fort (3) Panna lal Shah ka Talab (water tank) (4) Sukh Mahal (Palace) (5) Hari Singh Temple (6) Baghore Fort <u>Mandawa</u> (7) Mandawa Castle (1) Chokhani Haveli (2) Saraf Haveli (3) Goenka Haveli (4) Ladia Haveli <u>Parasrampura –</u>Shardul Singh's Chhatri (Cenotaph) <u>Baggar –</u>Reservior Ramgarh – Havelis and temple Surajgarh - Fort Alsisar and Malsisar – Havelis, temples, fort Bissau – Havelis Mehansar – Fort and temples	
Churu	<u>Churu</u> (1) Churu Fort (2) Kanhaiyalal Bagla Haveli (3) Kothari Haveli (4) Surana Haveli (5) Poddar Haveli (6) Nagarshree Chandmal Bhantia Haveli (7) Sagarmal Vaidya Haveli (8) Bajrangmal Mantri Haveli 9) Jai Dayal Goenka Haveli 10) Parakh Haveli 11) Jain Temple 12) Balaji Temple		Teej (July / August) Gangaur Festival (March/April)

Main Tourist Locations and Attractions

6.9.8 Unlike most other circuits in the state, where there are a few unique attractions, Shekhawati circuit itself is unique from the remaining circuits. The main attraction in the circuit are the painted havelis, which are more or less identical, are spread out over the entire region and as such the uniqueness of the region lies in its homogeneity. As a result the tourist usually does not visit more than 2 - 3 places in the circuit. Amongst the more popular ones are Mandawa, Nawalgarh, Mukundgarh, Sikar, Jhunjhunun and Dundlod.

- **Mandawa**: Mandawa is an important stop over for groups travelling from Delhi enroute Bikaner. The place is famous for its fort, the Mandawa Castle, now converted into a heritage hotel. Some havelis worth visiting in this small town are Chokhani, Saraf, Goenka and Ladia
- **Nawalgarh**: Nawalgarh has one of the finest havelis in the region. Some of the havelis are maintained by the trusts formed by respective owners and are converted into museums. Nawalgarh also has a fort, which now lies in a dilapidated condition
- **Mukundgarh**: Mukundgarh town built around a temple square is known for its fort, which is now a heritage hotel. Like other towns in the region, Mukundgarh also has painted havelis. It has good handicrafts market, selling textiles, brassware and iron scissors
- **Sikar**: Sikar, the largest town in the region, is known for its havelis and temples. Tourists also take small half-day excursions to Harshnath temples and Jeen Mata temples located close to Sikar
- **Dundlod**: Dundlod is known for its fort and the horse safaris. It also has the famous Goenka Haveli
- **Jhunjhunun**: Jhunjhunun, the capital of Shekhawati also has splendidly painted havelis. Other interesting attractions include Khatri Mahal, Badalgarh, Jorawargarh, Mertani Baori, Ajit Sagar and Jain temple

6.9.9 The popularity of Mandawa, Nawalgarh, Mukundgarh, Sikar, Jhunjhunun and Dundlod lies in the fact that they offer the visiting tourist with excellent staying options at their heritage hotels. As a result these towns have emerged as important locations on the tourist map of the region.

Less Frequented Tourist Locations

6.9.10 Apart from the places mentioned above, most towns in the region are relatively less visited by tourists. Places like Lachhmangarh, Ramgarh, Churi Ajitgarh, Chirawa, Parasrampura, Khetri, Fatehpur and Churu, although bestowed with the same attractions, do not fall on the regular tourist itinerary because of their inadequate travel links and / or their lack of good accommodation facilities for the tourist.

6.9.11 Surajgarh, Kajra, Alsisar, Malsisar Bissau, Mehansar, etc. are places with some unique attractions from what the entire region has to offer. These places also receive very few tourist arriving in the circuit.

Existing Tourist Traffic Trends

6.9.12 The region is relatively less popular amongst the tourist circuits in Rajasthan. Tourist traffic and past growth trends for the major tourist centres in the Shekhawati circuit are provided in Exhibit 6.90. The salient observations from the Exhibit are discussed in the subsequent paragraphs.

Exhibit 6.90

Tourist Arrivals in the Shekhawati Circuit

Tourist Location	Category of Tourist	1996	1997	1998	1999	2000	2001	CAGR	Comments
Jhunjhunun	Domestic	57997	63085	66205	61027	68192	76446	6%	More attractions close to Jhunjhunun, though the ton does not have too many attractions per se
	Foreign	24237	26641	30233	25346	28818	33751	7%	
	Total	82234	89726	96438	86373	97010	110197	6%	
Sikar	Domestic	6140	14912	7952	5952	8136	6382	1%	Entry point for groups and individuals travelling on roads towards Bikaner from Delhi.
	Foreign	480	803	574	337	527	295	-9%	
	Total	6620	15715	8526	6289	8663	6677	0%	

Source: DoT, Rajasthan

Domestic Tourist Traffic

- ❑ The domestic traffic in the circuit is highest in Jhunjhunun (~76 thousand). The arrivals have also grown (at a rate of 6%) over the years.
- ❑ Sikar, in comparison, has been getting close to 6000 domestic tourists every year. Domestic tourist arrivals have grown very insignificantly in the later half of the 90's.
- ❑ Although, no record is available, other tourist locations in the region such as Nawalgarh and Mandawa also currently get significant tourist traffic. Nawalgarh is rapidly gaining popularity amongst domestic tourists.

Foreign Tourist Traffic

- ❑ In the Shekhawati region, Jhunjhunun and the towns in the district receive the maximum of foreign tourists. Particularly, the heritage hotels at Mandawa, Nawalgarh and Dundlod are popular with in-bound tour operators. Arrival of foreign tourists in Jhunjhunun area has grown at 7% in the later half of the 90's.
- ❑ Other locations in the Shekhawati circuit are very rarely frequented by the foreign tourists, mainly because of their similarity with the places already visited.

Connectivity Infrastructure

6.9.13 Travel links of various tourist locations in the Shekhawati region are shown in Exhibit 6.91

Exhibit 6.91

Travel Connections of Towns within the Shekhawati Region

Sr. No.	Towns	Connections	Comments
1	Sikar	Road (NH-11), Rail (Metre Gauge, on the Jaipur-Bikaner and Delhi-Jaipur route)	Gateway to Shekhawati for tourist arrivals from Delhi (by train) and Jaipur (by road or train)
2	Jhunjhunun, Mandawa, Dundlod, Nawalgarh, Mukundgarh	Road (SH)	Poor condition of roads connecting the towns

Air

6.9.14 Jaipur Airport (located 130 Kms from Ajmer) is the closest airport. Regular services are operational from major cities such as Delhi, Mumbai, Ahmedabad and Kolkata to Jaipur. Jaipur also has a direct international air connection with Dubai in the Middle East. The airport is under the process of getting upgraded to an International Airport.

6.9.15 There is also a need for more direct flight services from metros from South, especially Chennai, which is a disembarkation point for tourists arriving from South / East Asia.

Rail

6.9.16 The Shekhawati region lacks a well developed rail network. Places like Jhunjhunun, Mukundgarh and Sikar are connected by Metre Gauge to Delhi, Jaipur and Bikaner. The Shekhawati Express runs between Delhi and Jaipur stopping at Jhunjhunun, Mukundgarh and Sikar. Reengus and Ratangarh are the important junctions in the Shekhawati region.

6.9.17 There are 4 train services daily from Jaipur to Sikar, 3 services daily from Delhi to Ratangarh and 3 services daily from Delhi to Reengus.

6.9.18 Presently, being connected by a metre gauge, there are very few connections from other places in the country to the Shekhawati region. Upgradation of rail network in this region would help in further connectivity with the rest of the country and increase the tourist inflow.

Road

6.9.19 Road is the most important mode of connectivity with the Shekhawati region. This circuit is mostly covered over road. Sikar and Jhunjhunun are connected by road to Jaipur, Bikaner and Delhi. The NH11 (Agra-Bikaner) passes through important tourist towns like Sikar, Fatehpur, Lachhmangarh and Ratangarh.

6.9.20 Apart from these, there is a good bus network of RSRTC across the region. However, most tourists do not travel by the RSRTC buses as the facilities available at the bus terminals at main cities are bare minimal.

6.9.21 The conditions of the roads connecting the tourist towns within the region are extremely poor and the tourist faces extreme discomfort negotiating the roads. There is also a lack of navigation aids like signboards and milestones identifying nearby towns of tourist interest.

<u>On-going and Proposed Projects</u>

6.9.22 Appendix 6A provides the list of proposed road construction and maintenance projects in the Shekhawati Circuit.

6.9.23 The roads within the Shekhawati Circuit which need to be prioritised for carrying repairs are listed below:

- ❑ Khetri to Jhunjhunun (40 Kms.)
- ❑ Jhunjhunun to Mukundgarh-Nawalgarh-Sikar (70 Kms.)

- Jhunjhunun to Mandawa-Fatehpur (48 Kms.)
- Sikar to Salasar (82 Kms.)
- Salasar to Talchappar (36 Kms.)

Tourism Related Direct Infrastructure

6.9.24 The Shekhawati region, although near to Delhi and Jaipur, is relatively less developed in terms of its travel links, and accommodation facilities for the tourist. The subsequent paragraphs discuss the status of the tourism infrastructure in the Shekhawati circuit.

Accommodation

6.9.25 The tourist stay in the region is concentrated in the main towns like Mandawa, Nawalgarh, Mukundgarh and Jhunjhunun. The typical stay duration of the tourist in the Shekhawati region is not more than 1 day, with most tourists arriving in the night and visiting the havelis in the nearby towns on their way to Bikaner from Delhi. Tourists (domestic or foreign) usually cover 1 – 2 towns in the region. Some tourists who, specifically come for the Shekhawati circuit from either Jaipur or Delhi, visit 3 – 4 locations spending 2 days in the region.

6.9.26 Exhibit 6.92 provides an overview of hotel accommodation in the Desert Circuit region.

Exhibit 6.92

Accommodation in Shekhawati Circuit- Current Status

Sr. No.	District	Location	No. of Units	No. of Rooms	No. of Beds	Of Which RTDC Hotels
1	Jhunjhunun	Jhunjhunun	3	45	90	
		Nawalgarh	3	58	116	
		Dundlod	1	45	90	
		Mukundgarh	1	46	92	
		Mandawa	3	137	274	
		Bagar	1	8	16	
		Mahansar	1	12	24	
		Arooka	1	06	12	
2	Sikar	Sikar	1	25	50	
		Fatehpur	1	10	20	Hotel Haveli (20 beds)
4	Others*		20	250	500	
	Total		**36**	**642**	**1284**	**1 (20)**

**AFF Estimates*

6.9.27 As seen from the exhibit, the tourist accommodation facilities in Shekhawati vary between two extremes. On one hand, there are about heritage and resorts hotels on one side and while small unregistered on the other. Except RTDC Hotel Haveli, Hotel Shiv Shekhawati and around 20 unregistered hotels, all other hotels are heritage properties or resorts. In addition, a number of dharamshalas and lodges throughout Shekhawati region offer accommodation on reasonable tariff.

6.9.28 Out of 650 hotel rooms in Shekhawati, the number of luxury rooms is close to 50% suggesting an abundance in the premium luxury segment. These places offer luxury accommodation catering primarily to foreign groups, who usually make an overnight stop on the way to Bikaner. The remaining 50% is mainly across the economy segment. Thus, prima facie there appears to be a shortfall in the mid-price / budget category of hotels.

6.9.29 The distribution of hotels shows that a large number of hotels are located in the small towns of Jhunjunun district. Very few options for accommodation are available for a tourist in Sikar and Churu district.

6.9.30 Apart from the above, the circuit houses, PWD and Electricity Board Dak Bungalows in Sikar, Churu, Jhunjhunun, Khetri and Pilani also provide accommodation facilities to the domestic tourists.

6.9.31 For the Shekhawati circuit, the present accommodation availability at an aggregate level is inadequate if one goes strictly by the present level of tourist arrivals in the region. However, since most tourists (especially domestic) prefer not to stay in Shekhawati, the present accommodation is sufficient for the overnight tourists.

6.9.32 In the future, as the road network improves the number of tourists arriving on tourist buses and taxis from Delhi is likely to increase. There might be a need for some more hotel rooms in the mod-range segment. For the foreign tourists who prefer to stay in the heritage hotels, some heritage should be identified to convert them into hotels.

On-going Projects

6.9.33 No new hotel projects are proposed in the Shekhawati region. A list of smaller hotel projects approved by DoT is provided in Appendix 6B.

Direct Tourism Infrastructure: Wayside Facilities

6.9.34 The current RTDC Midways / Wayside facilities that exist along the various tourist relevant routes in the Shekhawati circuit are given in Exhibit 6.93.

Exhibit 6.93

Midway facilities by RTDC in Shekhawati Circuit

Place	District	Type/ Management	Route Catered to
Ratangarh	Churu	Midway	Bikaner-Agra Highway (NH-11)
Sikar	Sikar	Wayside Facility	Bikaner- Agra Highway (NH-11)

Wayside Facility Gaps

6.9.35 For a tourist travelling from Jaipur to Jhunjhunun (distance 170) the first RTDC midway is at Sikar at a distance of 110 Kms from Jaipur. There are no RTDC wayside facilities on the stretch between Jaipur and Sikar. It is recommended that a new wayside facility be opened on the way. An ideal location for such a facility would be Reengus, at a distance of 58 Kms from Jaipur.

6.9.36 Within the circuit, there are hardly any good restaurants for the tourist to stop for refreshment. It is recommended that a midway (motel) be set up near Mukundgarh

6.9.37 Presently, the RTDC does not have any plans for constructing wayside facilities / motels in the Shekhawati region.

Tourist Offices

6.9.38 Rajasthan Tourism has tourist offices at Sikar and Jhunjhunun as indicated in Exhibit 6.94

Exhibit 6.94

Tourist information offices in Shekhawati Circuit

Sr. No.	District	TRC / TIB
1	Jhunjhunun	TRC, Jhunjhunun TIB, Jhunjhunun
2	Sikar	TIB, Sikar

Tourist Offices Gaps

6.9.39 The tourist movement in the Shekhawati region happens in a mostly from South (from Jaipur), West (from Bikaner) or East (from Delhi). For the tourists approaching from the Bikaner, the gateway to the heart of Shekhawati region is Fatehpur. A tourist passes through important places like Mandawa, Mukundgarh, Dundlod, Nawalgarh, Lachhmangarh, before he reaches Sikar or Jhunjhunun. Currently there is no Tourist Information office at Fatehpur. It is recommended that a small tourist information kiosk is setup on the NH-11 in the town.

6.9.40 Within the small towns with havelis, an individual tourist is left at the mercy of the locals to assist and guide him to different havelis in the town. Very little information is available to the tourist about the important havelis to visit in the town. It is recommended that tourist kiosks be started in the important towns of Nawalgarh, Mukundgarh and Mandawa.

Development of Tourist Spots / Tourist Site Enhancement

6.9.41 The Shekhawati region has a vast inventory of havelis, some of which are in an excellent condition. However, most of the havelis have over the years dilapidated. The havelis, which have been properly maintained, are the ones most frequented by the tourists.

6.9.42 Most havelis are privately owned, and as such, face a resource crunch for undertaking any kind of maintenance works. A large number of havelis can be taken up for restoration and converted into public attractions.

6.9.43 The roads leading to havelis are narrow bylanes and often crowded. The tourist taking these roads has to negotiate the dirt and bad roads to reach these havelis. There is need to have proper walkways, exclusively for pedestrians wanting to visit the havelis. These walkways would take the tourist around important havelis in the area and, as such, should be replete with signage.

Ongoing Projects

6.9.44 Exhibit 6.95 provides the list of developmental works being carried out in the Desert Circuit under various state and central Government plans.

Exhibit 6.95

Developmental Works in the Shekhawati Circuit

District	Name of the Project	State/ CSS	Total Cost (Rs. Lakhs)	Executing Agency	Status
Jhunjhunun	Development of Kirodi	State Plan	143.60	DRDA	Ongoing
	Development of Khetri Fort	State Plan	30.00	DRDA	Ongoing
	Chemical conservation of Bihariji Temple, Jhunjhunun	CSS	10.00	A & M	Proposed

District	Name of the Project	State/ CSS	Total Cost (Rs. Lakhs)	Executing Agency	Status
	Refurbishment of Ramgarh Fort, Jhunjhunun	CSS	10.00	A & M	Proposed
Sikar	Drinking water facility Harsh Sikar	State Plan	88.00	DRDA	Ongoing
	Conservation of cenotaphs of Todarmal at Udaipurwati	CSS	5.00	A & M	Proposed
	Repair and painting of 7 old gates, Sikar	CSS	10.00	Nagar Palika	Proposed
Churu	Tourist facility at Salasar	State Plan	20.00	Collector	Ongoing

Sanctuaries

6.9.45 Talchappar Wildlife Sanctuary near Churu is the only wild life sanctuary that comes under the Shekhawati circuit. The details of the Talchappar Wildlife Sanctuary are provided in Exhibit 6.96

Exhibit 6.96

Sanctuaries in Shekhawati Circuit: Existing Status

Protected Area	Area (Sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access
Talchappar W.L. Sanctuary	7	• Black buck and migratory birds	In Shekhawati • Private hotels • Heritage hotels	• Churu – 100 Kms

Ongoing and Proposed Projects

6.9.46 The Talchappar wildlife sanctuary is amongst the smallest wildlife sanctuary in the state. It is also amongst the least visited sanctuaries in the state. The State Forest Department has identified several works to be carried out for developing Talchappar Wildlife Sanctuary as an Eco-tourism site. The details of the works are as provided in Exhibit 6.97

Exhibit 6.97

Proposal for Development of Eco-Tourism at Talchappar Wildlife Sanctuary

Sr. No.	Details of Work	Amount (Rs. Lakhs)
1	Upgradation of Rest House	3.00
2	Eradication of Prosopis juliflora and other weeds	2.00
3	Interpretation Centre	5.00
4	Water bodies and shelters	5.00
5	Boring, pump, etc.	1.50
6	Publicity	0.50
	Total	**17.00**

Tourism Products

6.9.47 The DoT has identified tourism products like horse safaris, amusement parks, water parks for the Shekhawati region. The Shekhawati region offers an excellent opportunity to be developed as an art district. Besides, the region also can develop other tourism products such as Open air art galleries/ Interpretation and education at Jhunjhunun/ Sikar / Churu.

Summary of Infrastructure in Shekhawati Circuit

6.9.48 Exhibit 6.98 provides a summary of the tourism relevant infrastructure in the Shekhawati region.

Exhibit 6.98

Tourism Relevant Infrastructure in Shekhawati Circuit

Category	Current Status	Potential for Development		
		Short Term	Medium Term	Long Term
Connectivity Infrastructure	Poor	✓	✓	✓
		In line with tourist growth		
Accommodation	Poor	✓	✓	✓
		Need to build more hotel facilities		
Midway/ Wayside Facilities	Adequate	✓		
Tourist Offices	Adequate	✓		
Others (Recreational Facilities, Shopping Facilities, etc)	Not developed	✓	✓	
Monuments/ Site Enhancement	Not developed	✓		
Sanctuaries/ Eco-Tourism	Not developed		✓	
Tourism Products (Rural Tourism, Resort Tourism, Health Tourism, etc)	Not developed	✓	✓	✓

Evaluation of Potential for Tourism Growth and Traffic Forecast Assumptions

6.9.49 The evaluation of the Shekhawati circuit from the viewpoint of potential for tourism growth in the future is based on various factors as outlined in Exhibit 6.99

6.9.50 The Shekhawati circuit consists of several smaller towns famous for its painted havelis. Towns like Nawalgarh, Mukundgarh, Mandawa, Bissau, Dundlod, etc. are amongst the relatively more frequented places in the circuit. As such, the circuit offers limited diversity in terms of attractions. Very few domestic tourists coming to Rajasthan visit the Shekhawati Circuit. On the contrary, this circuit is more popular amongst the foreign tourists.

6.9.51 Road connectivity of the region with NCR and Jaipur is excellent. Places like Mandawa and Nawalgarh are important stopovers for tourist groups moving towards Jaipur or Bikaner from Delhi. Being smaller towns, the places within the circuit face constrains such as unavailability of civic amenities, poor road infrastructure, limited carrying capacity, lack of basic tourism infrastructure, etc. In terms of future development, the offers little potential for development of new locations or innovative tourism products.

Samode Haveli - Popular with foreign tourists visiting Jaipur and Shekhawati

Haveli in Shekhawati - Exquisite paintings adorn the interiors and exteriors

Exhibit 6.99

Shekhawati Circuit: Evaluation of Potential for Tourism Growth

	Low---------	Comments
Inventory of existing attractions		Painted walls and frescoes
Diversity of existing attractions		Painted havelis, palaces
Number of unique attractions		Homogeneity in the inventory of attraction throughout the region
Potential for promoting new locations and tourism products[1]		New tourism products: Heritage walks
Prima facie Tourism Potential based on attractions		
Present Connectivity		Good road connectivity with Delhi - Important gateway for tourist movement from Delhi to Bikaner (also Jaipur). Rail links not well developed. Nearest airport - Jaipur
Core Tourism Infrastructure[2]		
Opportunity for increasing the tourist season		High: Proximity to Delhi and Jaipur
Carrying capacity		Issue of carrying capacity in the smaller towns and villages.
Potential for Tourism growth		

6.9.52 Based on this assessment the forecast growth rates for the major locations within the Shekhawati circuit are as given below in Exhibit 6.100

Exhibit 6.100

Shekhawati Circuit – Forecast Growth Rates in Tourist Arrivals

Location	Tourist category	Short Term	Medium Term	Long Term
Jhunjunun	Domestic	6%	5%	5%
	Foreign	22%	10%	11%
Sikar	Domestic	12%	5%	5%
	Foreign	35%	10%	11%

Note: Short term growth rates are based on 'average' tourist arrival figures from 1997-2001. This has been done to discount the irregularities in tourist arrivals in the year 2001

6.10 HADOTI CIRCUIT

<u>Overview of the Circuit</u>

Background

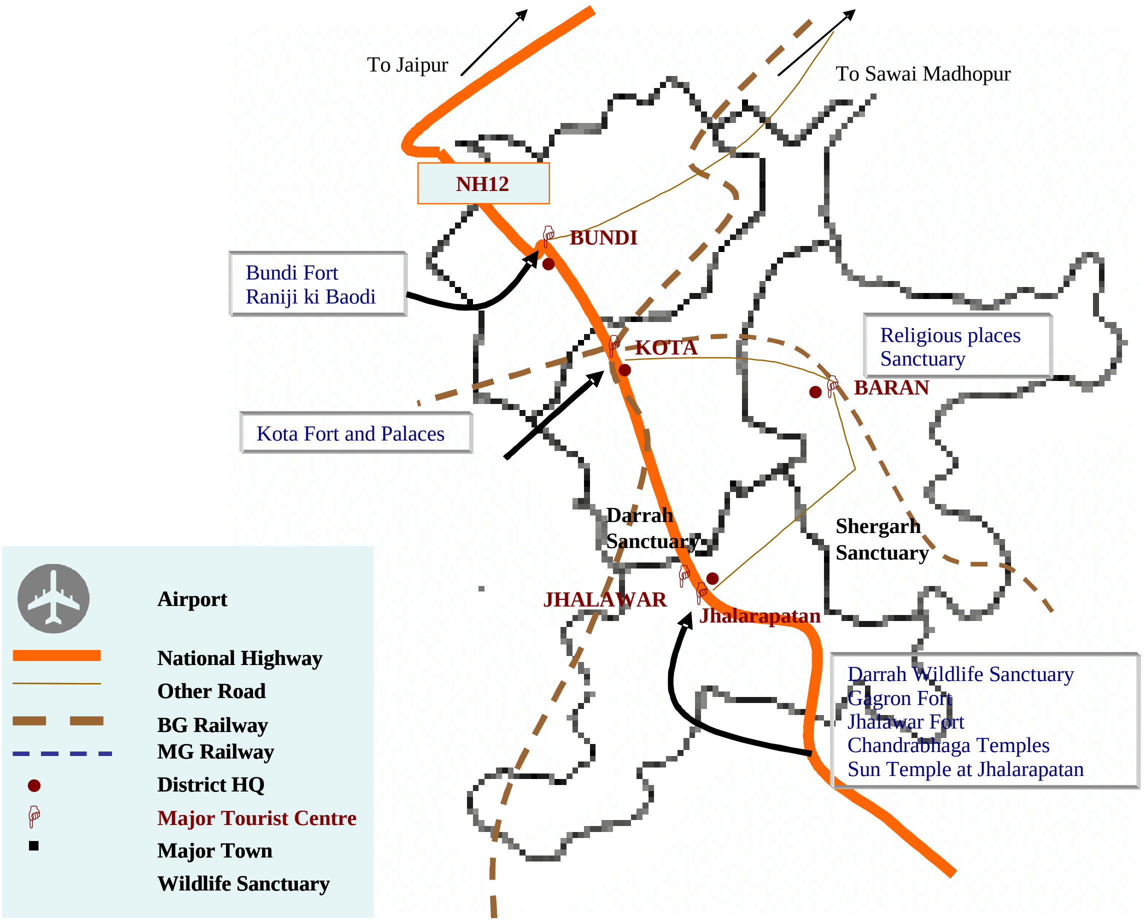
6.10.1 Hadoti circuit is the least explored regions of Rajasthan. The region is known for its beautifully sculpted temples and forts and palaces. This circuit includes locations like Bundi, Kota and Jhalawar. Places of tourist interest in Baran district are also covered as a part of this circuit.

6.10.2 Kota, Bundi, Jhalawar and Baran compose the backbone of the Hadoti region, which has a history that goes back several centuries. Surprisingly unexplored, the Hadoti region of Rajasthan has some splendid treasures for the tourist. Its impregnable fortresses, sprawling palaces, exquisitely wrought temples and lovely waterways act as a magnificent foil to exotic wildlife and delicate fresco paintings.

6.10.3 A map of the Hadoti tourism circuit is provided in Exhibit 6.101

<u>Exhibit 6.101</u>

<u>Map of the Hadoti Tourism Circuit</u>



Geography and Topography

6.10.4 The Hadoti region falls in the Harawati plains, which is interspersed with the Bundi hills and Kota plateau. The region has beautiful hills, valleys and lakes, which form a picturesque countryside.

6.10.5 Kota is a city strung out along the eastern bank of River Chambal, just below a rocky gorge. Bundi is surrounded by the Aravalli hills on three sides and is circumscribed by a massive wall with four gateways. Jhalawar lies at the edge of the Malwa plateau and has rocky but water-laden verdant landscape, unlike much of Rajasthan.

Travel links

6.10.6 Hadoti region is well connected in terms of rail and road, although it has very poor connectivity by air. The nearest airport is Jaipur, which is 215 Kms from Bundi.

6.10.7 NH12 connects the three main cities in the circuit, namely, Bundi, Kota and Jhalawar with each other and with Jaipur in the north. There are regular bus links connecting the region to the main tourist locations in the state and in neighbouring Madhya Pradesh. Kota also falls on the main broad gauge line running from Delhi to Mumbai, and is also connected by rail with Jaipur, Jodhpur, Bharatpur and Bundi.

Major Tourist Spots and Attractions

6.10.8 Hadoti has a large number of attractions. The main attractions in the region are given in Exhibit 6.102

Exhibit 6.102

Major Tourist Locations in Hadoti Circuit

District	Major Attractions	Major Excursions	Major Events
Kota	Kota (1) Kota Fort- Palaces, Havelis and Museum (2) Umaid Bhavan Palace (3) Jag Mandir Palace (4) Chambal Gardens (5) Kota Barrage	Ex-Kota (1) Badoli Temple Complex (48 Kms)- Baran (2) Rana Pratap Sagar Dam & Bhainsrogarh (50-55 Kms) (3) Bhanddeora Temple (110 Kms)- Baran district (4) Garhgachh Temple ruins (110 Kms)- Baran district (5) Sitabari (120 Kms)- Baran district (6) Shergarh Fort (125 Kms)- Baran district (7) Darrah Wildlife Sanctuary (50 Kms)	Kota Dussehra (October)
Bundi	Bundi (1) Taragarh Fort (2) The Palace (3) Chhattar Mahal or Palace of Towers (4) Ratan Daulat Monument (5) Chitrashala: Gallery of Miniatures and Murals (6) Nawal Sagar Lake (7) Raniji ki Baori Wells (8) Sukh Mahal Palace (9) Phool Sagar Palace (10) Shikar Burj (11) Keshar Bagh	Ex-Bundi (1) Jait Sagar Lake (3 Kms) (2) Rameshwaram Cave Temple (20 Kms) (3) Keshavraipatan Temples (45 Kms) (4) Ramgarh Sanctuary (45 Kms) (5) Bijolia Fort (50 Kms) (6) Menal Temples (70 Kms) (7) Talwas Fort and Temples (53 Kms) (8) Dugari Fort and Paintings (65 Kms) (9) Indragarh Fort (77 Kms)	Kajli Teej (July-August)

District	Major Attractions	Major Excursions	Major Events
	(12) 84 Pillared Cenotaph		
Jhalawar	Jhalawar (1) Jhalawar Fort (2) Government Museum (3) Bhavani Natya Shala Theatre	Ex-Jhalawar (1) Rain Basera Cottage (6 Kms) (2) Jhalarapatan Temples (6 Kms) (3) Chandrabhaga Temples (7 Kms) (4) Gagron Fort and Buddhist Caves and Stupas (5) Dag Temples (100 Kms) (6) Kakuni Temples and Fort (65 Kms) – Baran district (7) Bhimsagar Dam (24 Kms) (8) Atishey Jain Temple (35 Kms) (9) Dalhanpur Temples (54 Kms) (10) Fort of Gangadhar (120 Kms)	Jhalawar Fair (October-November)

Main Tourist Locations and Attractions

6.10.9 As seen in Exhibit 6.92, the Hadoti region has a vast inventory of attractions. The region is truly, the best kept secrets of Rajasthan, and has many beautiful and unexplored forts, palaces and old temples and temple ruins.

- **Kota**: Kota is a major industrial town of the state. Yet, memories of its ancient links linger strongly in form of various structures, ruins, paintings and murals. The most notable among these are the Kota fort and the various palaces and havelis within the fort, Jag Mandir and the Chambal Gardens. There are many small yet interesting attractions scattered in the city. A day's excursion from Kota is Baran district, which has many interesting attractions such as forts and temples.
- **Bundi**: 36 Kms from Kota is a tiny picturesque town of Bundi. Interesting monuments including impressive medieval forts, palaces, havelis, temples with beautiful stone idols and chhattris with carved pillars, along with a picturesque lake in the heart of the town, add to its charm. Bundi is very famous for its intricate carvings and murals.
- **Jhalawar**: Jhalawar boasts of rich historic as well as natural wealth with some exquisite pre-historic cave paintings, massive forts and thickly wooded forests and exotic wildlife variety. One can spot countless species of birds as one drives past the lush countryside. The countryside is all the more fascinating and colourful during winters.

Less Frequented Tourist Locations

6.10.10 The entire Hadoti circuit is unexplored, and rarely falls in the itinerary of major tour operators or individual tourist visiting Rajasthan. The region's vast inventory of attractions coupled with its differentiating natural surroundings accord it a very good potential for tourism development.

Existing Tourist Traffic Trends

6.10.11 Tourist traffic and past growth trends for the major tourist centres in the Hadoti circuit are provided in Exhibit 6.103. The salient observations are provided below.

Exhibit 6.103

Tourist Arrivals in the Hadoti Circuit

Tourist Location	Category of Tourist	1996	1997	1998	1999	2000	2001	CAGR	Comments
Kota	Domestic	6140	14912	7952	5952	8136	6382	1%	Being industrial town, many tourist shy away from the city
	Foreign	480	803	574	337	527	295	-9%	
	Total	***6620***	***15715***	***8526***	***6289***	***8663***	***6677***	***0%***	
Bundi	Domestic	87583	102162	83212	53017	53874	62438	-7%	Known for their natural beauty and vast historical wealth expressed through unique and unexplored forts, palaces, havelis and temples that attract the foreign tourist. Jhalawar hosts the famous Chandrabhaga fair
	Foreign	857	2156	1834	1523	1775	1991	18%	
	Total	***88440***	***104318***	***85046***	***54540***	***55649***	***64429***	***-6%***	
Jhalawar	Domestic	2016	2661	11333	29293	30433	20911	60%	
	Foreign	582	1431	3818	10342	10568	4334	49%	
	Total	***2598***	***4092***	***15151***	***39635***	***41001***	***25245***	***58%***	

Source: DoT, Rajasthan

6.10.12 The traffic in Hadoti region is very less as compared to its counterpart regions in the state.

Domestic Tourist Traffic

- Bundi receives the maximum number of domestic tourists in the Hadoti region. It is the house of many temple complexes. One of the main events in the place that attracts many tourists from nearby villages and major towns is the festival of Teej, called the Kajli Teej. Though, the tourist arrivals in the city have fallen in the last five years (a 7% decrease in CAGR terms), there has been an increase in the numbers in the year 2001 of approx. 16%
- Jhalawar, is another town that is popular with the domestic tourist. It houses the famous Sun temple at Jhalarapatan, and also has the famous Chandrabhaga fair that attracts many domestic tourists. The tourist arrivals in the city have increased at a rate of 60% per annum over the last five years, although they have shown a decrease in the year 2001
- Although Kota is one of the larger cities of Rajasthan it does not receive many tourists (approx. 6400). The domestic tourist arrivals in the city have shown a very small increase during the last five years (approx. 1% per annum)

Foreign Tourist Traffic

- The region does not receive many foreign tourists. Cumulative foreign tourist arrivals in the region account for less than 3% of the total foreign tourist arrivals in the state
- Jhalawar receives the maximum number of foreign tourists in the region. The number has also been growing at a rate of 49% per annum since 1996. In 1998, Jhalawar witnessed an increase of approx. 170% in foreign tourist arrivals. However, in 2001 there was again a decrease of 58% in the tourist arrivals

Connectivity Infrastructure

6.10.13 Travel links of various tourist spots in the Hadoti region are shown in Exhibit 6.104

Exhibit 6.104

Travel Connectivity of Towns within the Hadoti Region

Sr. No.	Towns	Connectivity	Comments
1	Kota	Road-NH12, Rail-BG Main trunk line between Delhi-Baroda-Mumbai	Has good rail services connecting it to major towns in the country Also has a airport, though not commercially used
2	Bundi	Road NH12, Rail	
3	Jhalawar	Road NH12	
4	Baran	Road, Rail BG	Good connectivity with Kota

Air

6.10.14 The nearest airport to the region is Jaipur, which is 215 Kms from Bundi and 245 Kms from Kota on the NH12. Although Kota has an airport, currently there are no commercial flights to/ from the city.

Rail

6.10.15 The Hadoti region has good rail connectivity. Kota, Jhalawar and Baran have broad gauge connectivity, with Kota falling on the main trunk line between Delhi-Mumbai. There are regular weekly and daily services connecting Kota to places in Rajasthan and in other states of the country.

6.10.16 There is one daily service and several convenient weekly services between Kota and Jaipur. Similarly, there are eight daily services from/ to Delhi and seven daily services from/ to Mumbai connecting Kota. Besides these, there are a few other weekly services between Kota and Delhi/ Mumbai. These services also connect Kota to Sawai Madhopur in Rajasthan. There are some daily and few weekly services from/ to Kota to/ from Amritsar, Jallandar, Ludhiana, Indore, Ujjain and Ratlam. Kota is also connected to Chittaurgarh, Jhalawar and Baran by broad gauge and regular passenger services operate on these routes.

6.10.17 Presently, there are no trains that connect Kota directly to the cities in the south.

Road

6.10.18 The Hadoti circuit has excellent road connectivity. The region is well connected by roads with National Highway (NH 12) passing through Bundi, Kota and Jhalawar. Baran is connected by state roads with the above cities.

6.10.19 Regular bus services are available on all the major routes connecting the three cities with other major cities in the state, particularly Jaipur, Sawai Madhopur and Chittaurgarh. There are bus services connecting Kota to several other cities in other states.

Tourism Related Direct Infrastructure

6.10.20 The overall tourism related infrastructure in the region is poor and inadequate. The DoT, however, plans to develop the region so as to fully tap its potential in the future. An assessment of the current status of tourism infrastructure in the Hadoti circuit is provided subsequently.

Accommodation

6.10.21 The tourist stay in the region (and hence the need for appropriate tourist accommodation) is concentrated in the three main cities of the region, namely, Kota, Bundi and Jhalawar. The foreign tourist typically stays in Kota and covers Bundi, Baran and Jhalawar as day trips ex-Kota. In this case, length of stay in Kota is typically 2 nights. The tourist may also take a night halt in Bundi.

6.10.22 The domestic tourist also takes a halt in Kota. However, he usually covers only a few places around the region. His stay is typically of two days. The domestic tourist coming to the region for festivals and fairs usually stays in temple dharamshalas/ dormitories or small guest-houses in the region. Exhibit 6.105 provides an overview of hotel accommodation in the Hadoti circuit region.

Exhibit 6.105

Accommodation in Hadoti Tourism Circuit- Current Status

Sr. No.	District	Location	No of Units	No. of Rooms	No. of Beds	Of which RTDC hotels-
1	Kota	Kota • Hotels • PG Accommodation	 20 21	 450 60	 900 120	• Chambal* (36)
2	Bundi	Bundi • Hotels • PG Accommodation	 10 18	 200 40	 400 80	• Vrindavati* (14)
3	Jhalawar	Jhalawar	5	100	200	• Chandrawati** (6)
		Total	**74**	**850**	**1700**	**3 (56)**

**RTDC property proposed to be licensed with staff*

*** RTDC property licensed without staff*

6.10.23 As seen from the Exhibit, the Hadoti circuit has a capacity of approx. 850 rooms (approx. 1700 beds assuming 2 beds per rooms). The distribution of hotels is reflective of the tourist distribution / arrivals in the place as discussed below:

- **Kota City:** Kota has the largest number of hotels and hotel rooms / bed capacity in the Hadoti circuit. Out of 900 hotel rooms in Kota, 20% is accounted by heritage rooms, whereas the rest is accounted by economy and other rooms. In addition paying guest facilities are available which provide and estimated additional 60 rooms and about 120 beds.
- Based on seasonality factor tourist arrivals into the city the average bed nights required in the city are close to 200, indicating an average occupancy of 46%. However, it is estimated that peak-time occupancy of hotels in Kota would be close to 75%. Thus there is no apparent shortfall in the hotel room availability in Kota at present. Although, overall the room capacity is sufficient to meet the room night demand, there is a serious shortfall in mid-range room facilities in Kota. Based on the trends in the mix of domestic and foreign tourist arrivals in Kota, there is a need to build more mid range hotels in the future

- **Bundi City:** Bundi has fewer hotels as compared to Kota. The number of paying guests facilities is also fewer. There are around 200 hotel rooms (with 400 bed capacity, assuming 2 beds per room), and around 40 paying guest rooms. Most accommodation is in the economy segment, although there are a few heritage hotels also. There are no star hotels in the city.
- **Jhalawar City**: There are very few hotels in Jhalawar city. Most domestic (apart from the religious tourists) as well as foreign tourist covers Jhalawar as a day trip from Kota.

6.10.24 Apart from the above, accommodation facilities are also provided at the pilgrim places in the circuit. Dharamshalas / dormitories at Jhalawar and Kota provide accommodation facilities to the domestic tourists.

6.10.25 Hadoti offers good tourism potential and many tour operators are looking at exploring the region. Its growth is presently restricted by the absence of required and sufficient tourism infrastructure, the most important being lack of proper accommodation facilities. Thus, there is a strong need to built heritage and mid-range accommodation facilities in the region, particularly in Bundi. Bundi lies 215 Kms south of Jaipur and can be covered by tourists/ tours from/ to Chittaurgarh, which falls in most ‘around Rajasthan’ tours.

6.10.26 There are no on-going or proposed hotel projects in the region.

Wayside Facilities

6.10.27 Currently, there are no RTDC midways/ wayside facilities in the Hadoti region. Also, there are no plans of DoT for constructing any wayside facility in the present plan.

<u>Wayside Facility Gaps</u>

6.10.28 Given the increasing traffic in the region, there is a need for wayside facilities at the popular routes taken by the tourists such as Jaipur-Bundi and Bundi-Chittaurgarh route

Tourist Offices

6.10.29 Rajasthan Tourism has tourist offices in the Hadoti circuit namely, at Kota, Bundi and Jhalawar as indicated in Exhibit 6.106

Exhibit 6.106

Tourist Information Offices in Hadoti circuit

Sr. No.	District	TRC / TIB
1	Kota	TRC, Kota TIB, Kota
2	Bundi	TIB, Bundi
3	Jhalawar	TIB, Jhalawar

<u>Tourist Offices Gaps</u>

6.10.30 It is recommended that a small tourist information kiosks be setup at those places where the tourist requires a guide service. The function of Tourist Information Kiosk located at the site would be to provide the visiting tourists with guide service (only those registered with the DoT). The information kiosks should be located at the popular tourist places within the circuit.

Development of Tourist Spots / Tourist Site Enhancement

6.10.31 Exhibit 6.107 provides the list of developmental works being carried out in the Hadoti circuit under various state and central Government plans.

Exhibit 6.107

Developmental Works in the Hadoti Circuit

District	Name of the Project	State/ CSS	Total Cost (Rs. Lakhs)	Executing Agency	Status
Kota	General toilets and development of lawns at Museum, Kota	State Plan	5.00	A & M	Ongoing
	Integrated development of important tourist places in Hadoti region Bundi and near Kota	State Plan	99.00	A & M	Ongoing
Bundi	Refurbishment of Baories at Bundi	CSS	10.00	A & M	Proposed
Jhalawar	Chemical conservation of Garh Palace	State Plan	12.50	A & M	Ongoing
	Refurbishment of Gagron Fort, Jhalawar	CSS	50.00	A & M	Proposed
	Construction of TRC, Jhalawar	CSS	10.00	RTDC	Proposed
	Conservation and Public Convenience at Jhalawar	CSS	48.00	A & M	Proposed

Sanctuaries

6.10.32 The details of the wildlife sanctuaries in the Hadoti region are provided in Exhibit 6.108

Exhibit 6.108

Sanctuaries in Hadoti Circuit: Existing Status

Protected Area	Area (Sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access
Shergarh W.L. Sanctuary	99	• Leopard, hyena, wild boar, chital, sambhar, sloth bear, etc. • Also visit to Gagron Fort (40 km), Kakuni temples (30 Kms)	• Haveli Shergarh Hotel • Forest Resthouse At Kota • RTDC hotel • Private hotels	• Kota–130 Kms • Jhalawar–50 Kms • Baran–45 Kms
Darrah W.L. Sanctuary	274	• Panther, sloth bear, hyena, jackal, wolf, etc. • Visit Ramgarh Vishdhari Sanctuary, Jawahar Sagar Sanctuary and Kota Barrage	At Kota • Forest Resthouse • RTDC hotel • Government Circuit house	• Kota–47 Kms on NH12
National Chambal W.L. Sanctuary	280	• Sun basking Gavials in winter on the river banks	At Kota • RTDC hotel • Forest Resthouse • Government Circuit house	• Kota–80 Kms
Ramgarh Vishdhari W.L. Sanctuary	253	• Tiger, leopard, wolf, sloth bear, sambhar, neelgai and birds • Ramgarh Palace and Cenotaphs	At Kota • Forest Resthouse • Government Circuit house	• Bundi–50 Kms • Kota–88 Kms

Protected Area	Area (Sq. Kms)	Activities / Sightseeing / Flora / Fauna	Accommodation	Road Access
			At Bundi • RTDC hotel • Private hotels	
Jawahar Sagar W.L. Sanctuary	153	• Gavial, Crocodile, sambhar, chital, wild boar, sloth bear, etc. • Also visit to Kota dam, Garadia Mahadev, Gaiparnath Temple	At Kota • Forest Resthouse • RTDC hotel • Government Circuit house	• Kota–35 Kms

Ongoing and Proposed projects

6.10.33 The State Forest Department has identified several works to be carried out for developing various wildlife sanctuaries in the region as Eco-tourism sites. The details of the works are as provided in Exhibit 6.109

Exhibit 6.109

Proposal for Development of Eco-Tourism in the Hadoti Region

Sr. No.	Details of Work	Amount (Rs. Lakhs)
1	**Darrah Sanctuary-Kota** • Upgradation of existing forest guest house including provision for basic furniture, minor repairs, etc. • Boring for water availability • Development of Interpretation Centre • Repair of old Baories and development of water holes • Construction of anicuts Publicity	**17.00**
2	**Ramgarh Vishdhari Sanctuary- Bundi** • Construction of Interpretation Centre • Upgradation of Forest House • Improvement of road network • Development of watch towers and hides • Construction of small anicut on river • Boring for water • Publicity	**23.50**
3	**Shergarh Fort – Baran** • Development of Interpretation Centre • Construction of rest house • Repair of approach road to the fort • Boring for water availability • Construction of water harvesting structures / water holes • Publicity	**10.75**
4	**Shahbad- Baran**	**14.50**
5	**Sorsan-Baran** • Construction of rest house • Trekking route / camping sites • Water harvesting structures • Boring • Watch towers / hides • Publicity	**12.50**

6.10.34 The specific spots that are being developed in various sanctuaries are elaborated below

- **Shergarh Fort- Baran**: Shergarh Fort is surrounded by dense dhok forests in an area of about 100 hectares. Basic facilities developed at Shergarh Fort would attract eco tourists. It is proposed to convert some portion of the fort into a rest house. Provision for repair, furnishing, etc. is being kept. Boring is to be done to ensure water availability. Approach road would have to be repaired.
- **Shahbad- Baran**: The tract near Shahbad contains very good Dry Mixed deciduous forest, which is an ideal resort for large and small mammals, birds and reptiles. The tract en-bounds variety of vegetation including endangered species and medicinal herbs. The escarpments in Upper Vindhyan region contain large number of permanent water holes. Besides there is a large possibility to develop new water points by erecting anicuts across hordes of rivulets joining Kunnu river. Kunnu River itself contains permanent water 'Dehs' – an ideal place for the animals to drink water. Geological studies reveal all phases of Vindhyan Formations like Vindhyan super group, Sirbu Shales, lime stone, Bhandar sand stones, Ganurgarh shales, Rewa shales and sand stone exposed east of Shahbad.
- Above all, the tract contains large population of sloth bear an endangered species (above 50 in number) and traces of tiger are not ruled out. Among other animals sighted so far include Leopard (abundant visibility), wild-boar, Hyena, Sambhar, Spotted dear, Fox, Jungle Cat, Wild dog (Dhole), Caracal, civets, etc.
- The area is historically important too. The famous Shahbad Fort in the middle provides a picturesque resort. Future Kota-Shivpuri National Highway Jaipur-Kota-Jabalpur would provide ample opportunity to the tourists from Shivpuri and Kota alike. Shivpuri National Park on one end, Shergarh and Darrah Sanctuary on other with Sorsan Godawan closed area would attract wildlifers, conservationists and environmentalists considerably.
- It is proposed to develop an Interpretation Centre in the area. For providing accommodation to the visiting tourists, a rest house is being proposed. Boring for water is essential and is being proposed. Repair of approach road is being proposed. Water harvesting structures like anicut / water hole are also being proposed.
- **Sorsan-Baran**: Sorsan is situated at a distance of about 40 Kms. from Kota. The Great Indian Bustard is found in natural conditions in this area. Besides the Great Indian Bustard, other wild animals like lesser floricans, black buck, Chinkara, Wolf, Fox, Monitor lizard, etc. are found in this closed area. The area of Sorsan closed area is about 100 Sq. Kms. It can be developed as a good destination for bird watches and wild lifers. It is proposed to construct a rest house in the area with provision for basic furniture and other amenities. Boring is to be done. Water harvesting structures need to be developed. Development of watch towers / hides is being proposed. Trekking route through the closed area is also being proposed.

Tourism products

6.10.35 Hadoti circuit, being totally unexplored has no developed tourism products. The region has been traditionally selling the nature and history concept. Given its unexplored nature there are many new products that can be started in the place. The region can be developed very distinctively to add to the product portfolio that Rajasthan can offer.

Summary of Infrastructure in Hadoti Circuit

6.10.36 Exhibit 6.110 provides a summary of the tourism relevant infrastructure in the Hadoti region.

Exhibit 6.110

Tourism Relevant Infrastructure in Hadoti Circuit

Category	Current Status	Potential for Development		
		Short Term	Medium Term	Long Term
Connectivity Infrastructure	Fairly developed	✓	✓	✓
		In line with tourist growth		
Accommodation	Poor	✓	✓	✓
Midway/ Wayside Facilities	Not present	✓	✓	
Tourist Offices	Adequate		✓	
Others (Recreational Facilities, Shopping Facilities, etc)	Not developed	✓	✓	
		Kota textiles are very well known. Build shopping complexes to retail the local textiles.		
Monuments/ Site Enhancement	Not developed	✓		
Sanctuaries/ Eco-Tourism	Not developed		✓	✓
Tourism Products (Rural Tourism, Resort Tourism, Health Tourism, etc)	Not developed	✓	✓	✓

Evaluation of Potential for Tourism Growth and Traffic Forecast Assumptions

6.10.37 The evaluation of the Hadoti circuit from the viewpoint of potential for tourism growth in the future is based on various factors as outlined in Exhibit 6.111

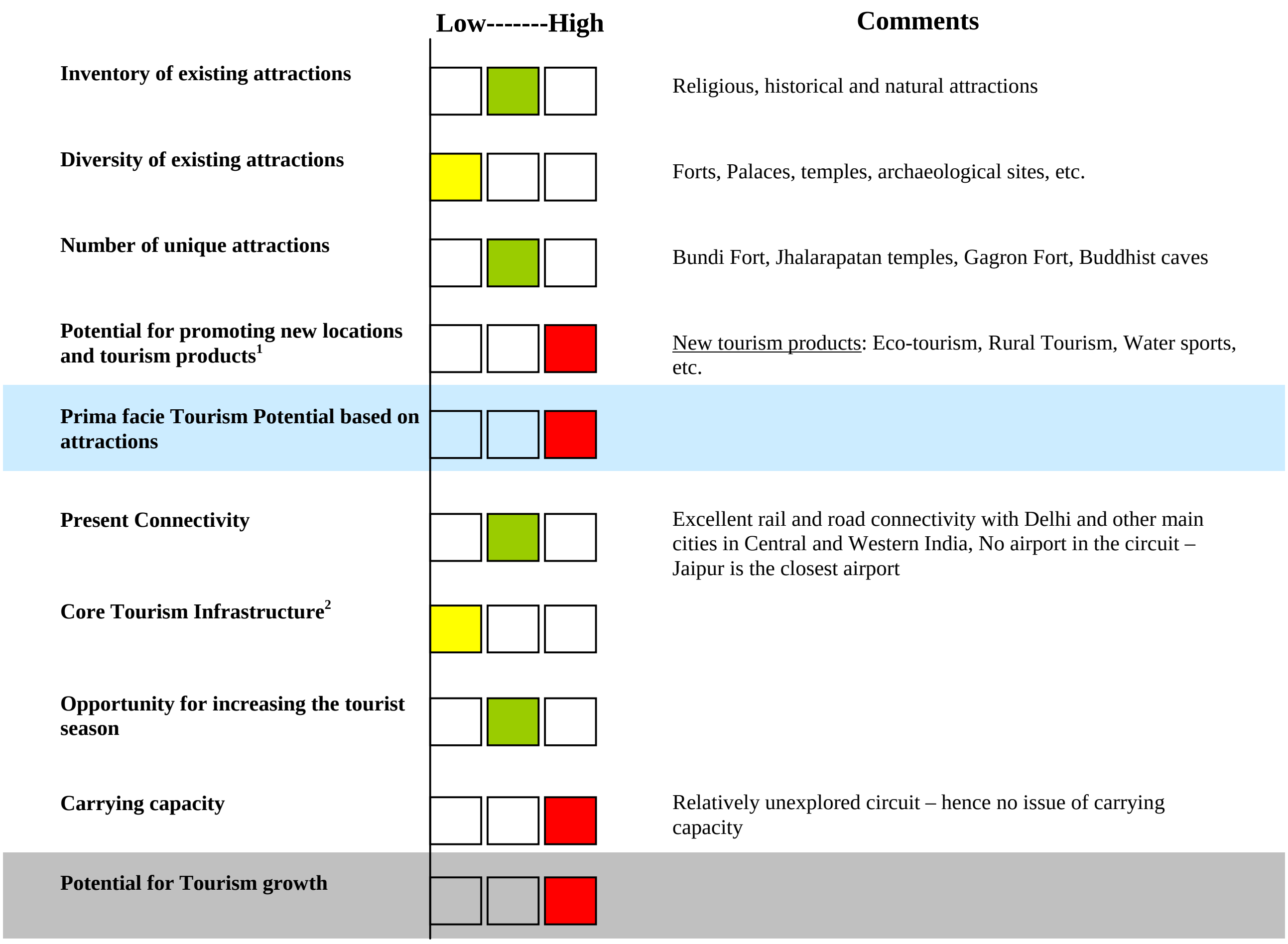
6.10.38 As seen in the Exhibit, the Hadoti circuit has a very good potential for tourism development given its vast bank of attractions coupled with its unique topography. The region is also well connected by road and rail and is accessible from North (Delhi, Agra), East (Ujjain, Indore and Ratlam), West (Udaipur, Chittaurgarh) and South (Mumbai).

6.10.39 The region has also experienced one of the highest growths amongst the tourist circuits in Rajasthan in the past few years. With the marketing and promotion efforts of the DoT supported by the private sector, Hadoti circuit is expected to emerge as a popular destination in the future.

6.10.40 Given its low base of tourist arrivals and its growing popularity, Hadoti circuit is likely to experience high growth rates in the future. The short-term growth would, however, be constrained by its lack of basic tourism infrastructure such as accommodation, tourist offices, midways and site development works.

Exhibit 6.111

Hadoti Circuit: Evaluation of Potential for Tourism Growth



6.10.41 Based on this assessment the forecast growth rates for the major locations within the Hadoti circuit are as given below in Exhibit 6.112

Exhibit 6.112

Hadoti Circuit – Forecast Growth Rates in Tourist Arrivals

Location	Tourist category	Short Term	Medium Term	Long Term
Kota	Domestic	15%	10%	8%
	Foreign	18%	12%	13%
Bundi	Domestic	22%	15%	16%
	Foreign	32%	12%	13%
Jhalawar	Domestic	9%	8%	8%
	Foreign	18%	12%	13%

Note: Short-term growth rates are based on 'average' tourist arrival figures from 1997-2001. This has been done to discount the irregularities in tourist arrivals in the year 2001

Gadh Palace, Bundi

Kota Palace

Gagron Fort - Surrounded on three sides by water

Menal Waterfall - One of the lesser known destinations in Hadoti Circuit

CHAPTER 7 :

FORECAST OF FUTURE TOURIST TRAFFIC

This chapter contains:

- Past trends of tourist traffic into Rajasthan
- Brief methodology for 20-year forecast
- Location-wise Tourist Traffic Forecast
- (The traffic estimates for individual tourist circuits is given in Chapter 6)

7.1 PAST TRENDS OF TOURIST TRAFFIC INTO RAJASTHAN

Overview of Tourist Traffic Trends in India

7.1.1 Total tourist traffic in India was estimated at 240 Mn tourists in 2001. Domestic tourists account for more than 98% of total tourist arrivals in Rajasthan. Exhibit 7.1 provides a summary of tourist traffic trends in India and Rajasthan over the past few years.

7.1.2 Although, foreign tourist arrivals in India showed a healthy growth during most part of the early 1990's, this was followed by a period of near stagnant arrival levels. This was primarily due to increased competition from the South East Asian countries, which were becoming more attractive and cheaper destinations due to meltdown in their economies in the post Asian crisis period. Political instability and transitory domestic social conditions prevailing in India further compounded the decline of foreign tourist arrivals in India.

Rajasthan: Tourist Traffic Trends

7.1.3 Rajasthan received around 0.61 Mn of the 2.62 Mn foreign tourists who visited India in 2001. Additionally, the state also recorded over 7.75 Mn domestic tourist in the same year. Tourist arrivals in Rajasthan have been following a more or less similar growth trend as that of the overall Indian market.

7.1.4 The domestic tourist traffic in Rajasthan has grown annually at the rate of 7% (between 1990 and 2001) whereas, the foreign tourist arrivals have grown at a lower rate of 3% in the same period. In terms of domestic tourist arrivals, the state has a share of 9% of the national total. The national average of 32: 1 for domestic to foreign tourists drops to about 12.8: 1 for the state of Rajasthan, which indicates that though domestic tourism is larger and growing rapidly as compared to foreign tourists, the state still has a higher share of foreign tourists as compared to the national average.

7.1.5 Exhibit 7.1 shows the past trend of tourist arrivals in Rajasthan.

Exhibit 7.1

Summary of Tourist Traffic Trends in India and Rajasthan

	Category of Tourist	1996	1997	1998	1999	2000	2001	CAGR
India	Domestic	140119672	159877008	168196000	190671014	210113540	198223323 *	7%
	Foreign	2287860	2374094	2358629	2481928	2641157	2625074*	3%
	Total	**142407532**	**162251102**	**170554629**	**178564370**	**189243750**	**200918397**	**7%**
Rajas-than	Domestic	5726441	6290115	6403310	6675528	7374391	7757217	6%
	Foreign	495021	605060	591369	562685	623100	608283	4%
	Total	**6221462**	**6895175**	**6994679**	**7238213**	**7997491**	**8365500**	**6%**

Source: DoT, Rajasthan **Provisional based on various published sources*

7.1.6 The Compounded Annual Growth Rates (CAGR) in the domestic and international tourist arrivals in Rajasthan was:

- 7% (domestic) and 3% (foreign) between 1990 to 2001 (over the decade)
- 7% (domestic) and 5% (foreign) between 1990 to 1995 (1^{st} half of the 90's)
- 6% (domestic) and 2% (foreign) between 1996 to 2001 (2^{nd} half of the 90's)

7.1.7 As seen, the 2^{nd} half of the 90's decade has seen a marked slowdown in foreign tourists in the state (in line with national trends) whereas domestic tourist continue to grow roughly at the same rate as in the early 90's.

7.1.8 The location-wise past growth trends across Rajasthan is presented in Exhibit 7.2 and is analysed as follows:

Domestic Tourists: Past Growth Trends

7.1.9 The tourist locations in Rajasthan experiencing strong growth in domestic tourist arrivals are :

- Nathdwara in the Mewar Circuit
- Ajmer and Pushkar in the Merwara – Marwar Circuit
- Alwar and Sariska in the Brij- Mewat Circuit
- Jhunjhunun in the Shekhawati Circuit
- Bundi and Jhalawar in the Hadoti Circuit

Foreign Tourists: Past Growth Trends

7.1.10 All the above locations (with the exception of Nathdwara which is a domestic pilgrim centre) have also experienced a good growth in foreign tourist arrivals albeit on a smaller base. Amongst the traditional foreign tourist destinations Jodhpur, Bikaner and Sawai Madhopur have experienced strong growth whereas decadal growth has been slow in the larger destinations of Jaipur and Udaipur.

Exhibit 7.2

Past Growth Trends in Tourist Arrivals

	2001			Growth Rates (Domestic)			Growth Rates (Foreign)		
	Domestic	**Foreign**	**Total**	**1990-2001**	**1990-1996**	**1996-2001**	**1990-2001**	**1990-1996**	**1996-2001**
Jaipur	655715	172950	828665	5%	9%	0%	1%	0%	3%
Ajmer	1269309	54040	1323349	10%	4%	19%	20%	41%	-1%
Pushkar	865000	46182	911182	8%	11%	4%	12%	25%	-1%
Bharatpur	101181	9553	110734	-2%	-1%	-3%	0%	21%	-21%
S. Madhopur	50598	10064	60662	1%	7%	-6%	6%	4%	9%
Alwar	100995	3334	104329	9%	5%	15%	20%	32%	7%
Sariska	11817	12351	24168	7%	-3%	19%	25%	2%	60%
Siliserh	1843	120	1963	-2%	-5%	1%	-7%	11%	-24%
Behror	3799	36	3835	--	--	-12%	--	--	-13%
Jhunjunun	76446	33751	110197	18%	30%	6%	8%	9%	7%
Sikar	6382	295	6677	--	--	1%	--	--	-9%
Kota	62438	1991	64429	-3%	-1%	-7%	1%	-12%	18%
Bundi	20911	4334	25245	22%	-3%	60%	27%	11%	49%
Jhalawar	174262	72	174334	--	--	30%	--	--	9%
Jodhpur	383479	69812	453291	-1%	-1%	-2%	4%	2%	8%
Jaisalmer	103319	46914	150233	0%	-4%	5%	1%	4%	-1%
Bikaner	185645	31441	217086	5%	8%	2%	9%	8%	9%
Udaipur	662826	56760	719586	2%	2%	1%	-1%	4%	-7%
Nathdwara	319159	562	319721	4%	3%	7%	67%	-100%	
Chittaurgarh	120390	7552	127942	-2%	3%	-8%	4%	24%	-16%
Banswara	115101	273	115374	9%	9%	9%	40%	83%	1%
Rishabdeo	8200	60	8260	7%	12%	0%	14%	-1%	36%
Mount Abu	1282940	13752	1296692	8%	13%	3%	7%	14%	0%
Ranakpur	61535	24144	85679	-4%	-9%	2%	-4%	-54%	133%
Others	1113927	7940	1121867	--	--	22%	--	--	3%
	7757217	**608283**	**8365500**	**7%**	**7%**	**6%**	**3%**	**5%**	**2%**

Source: DoT Statistics, Government of Rajasthan

7.1.11 Having analysed the location wise past growth trends in the tourist traffic in Rajasthan (both domestic and foreign) the following paragraphs describe the methodology used to forecast future traffic over the next 20 years Perspective Plan period.

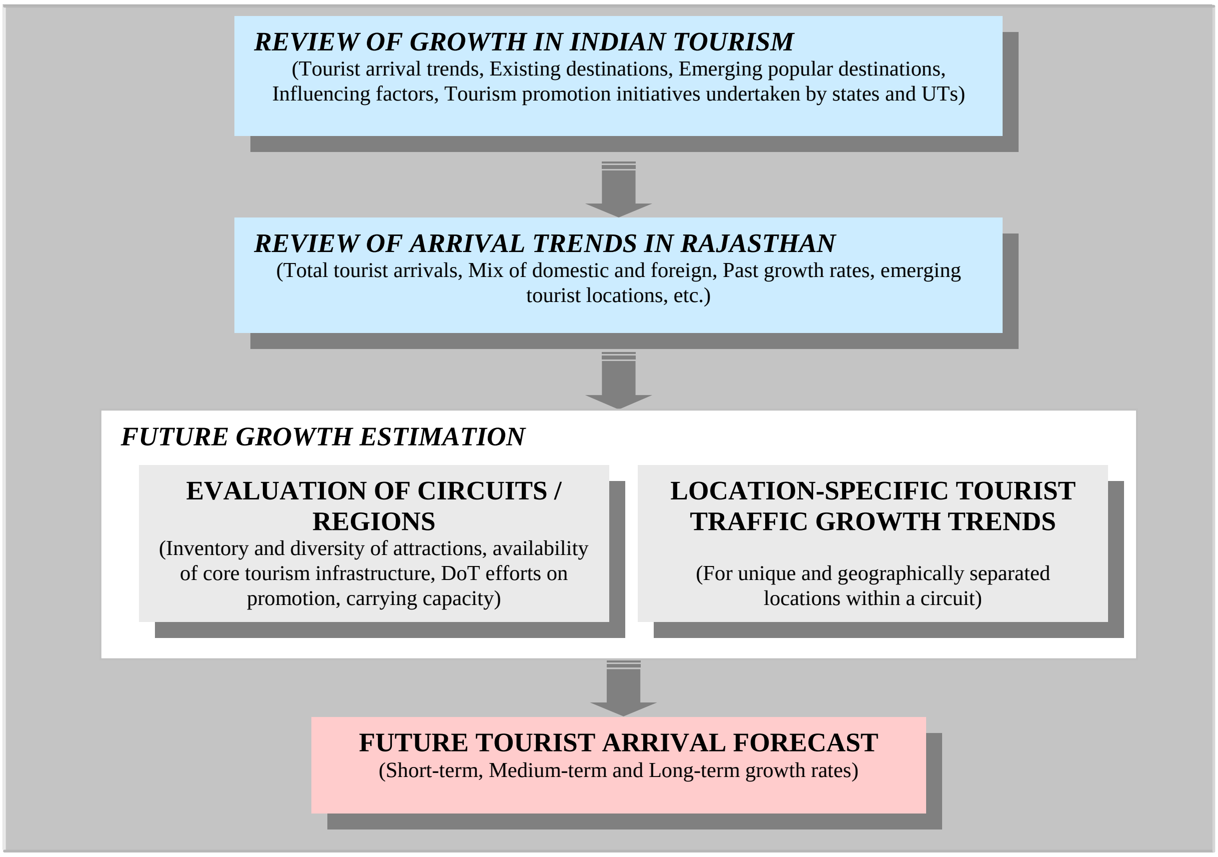
7.2 BRIEF METHODOLOGY FOR 20-YEAR FORECAST

7.2.1 The estimation of future tourist arrivals is mainly based upon an analysis of the past trends in tourist arrivals (both domestic and foreign) and an evaluation of the circuit and its main tourist locations from the viewpoint of future potential for development. Location-wise tourist arrivals for all important tourist locations within the state have been projected for both domestic and foreign tourists.

7.2.2 The conceptual framework of the forecasting model is provided in Exhibit 7.3.

Exhibit 7.3

Future Tourist Arrival Forecast: Conceptual Framework



7.2.3 The various steps followed for tourist arrival forecast are as detailed below:

- **Review of growth in Indian tourism (domestic and foreign tourists) market**: The tourism market in the country (for domestic and foreign tourists) was reviewed for understanding the tourist arrival trends, arrivals at existing destinations, emerging popular destinations, influencing factors for tourism and tourism related initiatives undertaken by various states and UTs.

- **Review of past tourist arrival trends in Rajasthan**: A review of tourism in Rajasthan was done from the point of view of understanding the past trends in arrivals and mix of domestic and foreign in various circuits / regions and at various locations within it, emerging tourist locations experiencing high growth, etc.

- **Estimation of future growth potential at circuit / regional level** : This included the following:

  - **Evaluation of circuits / regions**: In this stage a particular circuit / region was evaluated in terms of its inventory and diversity of attractions, availability of core tourism infrastructure, DoT efforts on promoting the circuit / region, carrying capacity, etc. to assess the overall future potential for development of tourism in the circuit.

  - **Location-specific forecast growth rates**: After the future potential was ascertained at the circuit level, growth rates for potential tourism growth at the major locations were assumed.

- **Future Tourist arrival Forecast**: Based on these individual growth rates, the future tourist arrivals are computed based upon the short-term, medium-term and long-term growth rates expected for the location.

7.2.4 Based on the above the projected tourist traffic for Rajasthan upto year 2021 is provided in Exhibit 7.4

Exhibit 7.4

Projected Tourist Traffic

Year	Domestic	Foreign	Total
2001 (Actual)	7757217	608283	8365500
2006	8893545	894632	9788177
2011	10973192	1201467	12174658
2021	16172269	1785142	17957411

7.2.5 Thus, by year 2021, the total tourist arrivals in the state would more than double to about 18 Mn from the present arrival figure of 8.4 Mn.

7.2.6 The tourist arrivals in the state are expected to grow at a CAGR of approx. 3% and 8% in the short term (by year 2006) in the domestic and foreign tourist categories, respectively. In the medium term (by year 2011), the tourist arrivals are expected to grow at a CAGR of 4% and 7% in the domestic and foreign tourist categories respectively. In the long term (by the year 2021), the overall growth is expected to be relatively lower at 4% for domestic tourists and 8% for foreign tourists.

7.2.7 The growth in tourist arrivals in the initial part of the forecast period would be mainly from tourists arriving at the existing popular tourist locations in the state. However, as these places get saturated over a long period, the growth in tourist arrivals at these places is likely to plateau due to the limited carrying capacity of those places. Lesser-known destinations / new tourist locations, in mean time, have to be developed to attract tourists. The new locations are expected to contribute to the further growth in tourist arrivals in the state in the medium and the long term.

Locationwise Forecast of Tourist Traffic in Rajasthan

7.2.8 Based on the location-wise/ circuit-wise evaluation and assessment of potential for future tourism growth, Exhibit 7.5 provides the forecast of tourist arrivals at the important locations in Rajasthan. Refer Appendix 7 for the detailed year-wise, location-wise projections on likely traffic.

Exhibit 7.5

Forecast of Tourist Arrivals at the Important Locations in Rajasthan

Circuit	Location	Tourist Category	Actual 2001	Forecast of Tourist Arrivals (Nos.)		
				2006	2011	2021
Desert	Jodhpur	Domestic	383479	393536	434495	583925
		Foreign	69812	89247	113904	145789
		Total	453291	482782	548399	729714
	Jaisalmer	Domestic	103319	87752	106764	136650
		Foreign	46914	73477	107962	159737

Circuit	Location	Tourist Category	Actual 2001	Forecast of Tourist Arrivals (Nos.)		
				2006	2011	2021
		Total	150233	161229	214726	296387
	Bikaner	Domestic	185645	216642	239190	264215
		Foreign	31441	44729	62735	92820
		Total	217086	261371	301925	357034
Mewar	Udaipur	Domestic	662826	685293	720250	795604
		Foreign	56760	90994	110708	148712
		Total	719586	776287	830957	944316
	Nathdwara	Domestic	319159	491301	597743	693621
		Foreign	562	390	474	637
		Total	319721	491691	598217	694258
	Chittaurgarh	Domestic	120390	170227	178910	197628
		Foreign	7552	10409	12664	17012
		Total	127942	180636	191574	214640
	Rishabdeo	Domestic	8200	22688	27603	32031
		Foreign	60	48	53	65
		Total	8260	22736	27656	32096
Vagad	Banswara	Domestic	115101	144154	192911	285423
		Foreign	273	332	367	447
		Total	115374	144487	193278	285871
Dhundhar	Jaipur	Domestic	655715	775477	856189	945766
		Foreign	172950	200776	232754	297909
		Total	828665	976253	1088943	1243675
Godwar	Mount Abu	Domestic	1282940	1395053	1540251	1701395
		Foreign	13752	19733	24009	30729
		Total	1296692	1414786	1564259	1732124
	Ranakpur	Domestic	61535	63953	70609	77997
		Foreign	24144	30787	37458	47943
		Total	85679	94740	108067	125940
Merwara - Marwar	Ajmer	Domestic	1269309	1343507	1714693	2303318
		Foreign	54040	68594	87546	117598
		Total	1323349	1412101	1802238	2420916
	Pushkar	Domestic	865000	1157712	1477567	1891185
		Foreign	46182	63636	81218	109098
		Total	911182	1221348	1558784	2000284
Brij – Mewat	Bharatpur	Domestic	101181	120276	146334	216610

Circuit	Location	Tourist Category	Actual 2001	Forecast of Tourist Arrivals (Nos.)		
				2006	2011	2021
		Foreign	9553	13808	19366	31531
		Total	110734	134083	165699	248140
	S. Madhopur	Domestic	50598	80682	98162	125641
		Foreign	10064	15033	22089	32682
		Total	60662	95715	120251	158322
	Alwar	Domestic	100995	109715	140027	207274
		Foreign	3334	8524	10879	17720
		Total	104329	118239	150906	224995
	Sariska	Domestic	11817	24732	39831	64881
		Foreign	12351	30874	62100	111013
		Total	24168	55607	101931	175894
	Siliserh	Domestic	1843	2429	3099	4165
		Foreign	120	237	262	319
		Total	1963	2666	3362	4485
	Behror	Domestic	3799	8585	10957	14024
		Foreign	36	171	275	469
		Total	3835	8756	11232	14493
Shekhawati	Jhunjunun	Domestic	76446	101244	129216	165387
		Foreign	33751	90977	146520	250024
		Total	110197	192221	275736	415412
	Sikar	Domestic	6382	11081	14143	18102
		Foreign	295	1332	2145	3659
		Total	6677	12413	16287	21761
Hadoti	Kota	Domestic	62438	128100	206306	305242
		Foreign	1991	4553	8024	15048
		Total	64429	132653	214330	320290
	Bundi	Domestic	20911	56318	113275	232833
		Foreign	4334	17258	30415	57036
		Total	25245	73576	143690	289869
	Jhalawar	Domestic	174262	262968	386386	571682
		Foreign	72	166	292	548
		Total	174334	263134	386679	572230
Others	Others	Domestic	1113927	1040122	1528280	4337669
		Foreign	7940	18546	27251	96595
		Total	1121867	1058668	1555531	4434265
Total	Total	Domestic	7757217	8893545	10973192	16172269
		Foreign	608283	894632	1201467	1785142
		Total	8365500	9788177	12174658	17957411

7.2.9 As seen from the Exhibit, Ajmer, Pushkar, Mount Abu, Udaipur and Jaipur would continue to be the important locations for tourism in Rajasthan inspite of constraints on their carrying capacity. In the later part of the forecast period (in the long term), other relatively unexplored locations are expected to gain importance and tourist arrivals grow sharply.

7.2.10 The prime focus therefore should be on augmenting the tourism infrastructure at the presently popular destinations to meet the short and medium term growth. At the same time, new tourism products and infrastructure should be created at the lesser-known destinations so that they attract some share of tourists from the already saturated places.

CHAPTER 8 :

NEW TOURISM PROJECTS IN RAJASTHAN: INVESTMENT AND PHASING

This chapter contains:

- Summary of new tourism projects in the state
- Category-wise summary of investment

8.1 SUMMARY OF NEW TOURISM PROJECTS IN THE STATE

8.1.1 This chapter provides a summary of the newly identified tourism projects across different categories in the state. For each of the identified projects an indicative cost estimate is provided and priority assigned to prepare a phased investment plan spanning the next 20 years (upto 2021). For the purpose of phasing of the projects, three time periods have been considered as follows:

- Short term (2002-06), i.e. 5 years
- Medium term (2006-11), i.e. next 5-10 years
- Long term (2011-21), i.e. beyond 10 years

8.1.2 While providing the overall cost estimates and phasing of investment for the proposed projects, the likely parties responsible for funding and implementation of the projects have been identified.

It should be noted that these new tourism projects are in addition to the on-going and proposed projects in individual circuits that have been elaborated earlier in Chapter 6.

<u>Accommodation</u>

8.1.3 Rajasthan presently has a bed capacity close to 70,800 beds across different categories of accommodations such as hotels, paying guests, dharamshalas, dormitories and tents. Out of the this estimated capacity more than 75% is concentrated at the major tourist hubs like Jaipur, Udaipur, Mount Abu, Jodhpur, Ajmer, Jaisalmer, etc.

8.1.4 Planning for hotel capacity for the future is based on the concept of 'Peak time' requirement. For the present capacity assessment, 'Peak time' has been defined as the time (day/ days/ week or months) during which there is maximum pressure on the tourism infrastructure (particularly accommodation).

8.1.5 At most places in Rajasthan the tourist season extends from September to March (7 months), however, the tourist arrivals are concentrated in the winter months of December, January and February. The arrival of two categories of tourists, viz. foreign and domestic exhibits a distinct pattern. Foreign tourist season extends from September to March. The domestic tourist season is evenly spread out, with large number of arrivals coinciding with the annual Diwali, Christmas-New Year and summer vacations.

8.1.6 However, certain cities/ locations have distinct peak periods as shown in Exhibit 8.1.

Exhibit 8.1

Peak time for select tourist cities/ locations

City/ Location	Peak time (days)	Rationale
Ajmer	14 (mostly domestic tourists)	Annual Urs at the Dargah
Pushkar	10 (foreign tourists) 20 (domestic tourists)	Pushkar / Camel Fair
Mount Abu	20	Diwali, Christmas-New Year vacations

Note: There are other lesser known locations where the tourist arrivals are concentrated during certain events / religious fairs, notable among these being Baneshwar (Dungarpur), Jhalarapatan (Jhalawar), Ramdeora (Jaisalmer), Shri Kolayat (Bikaner), Keladevi (Karauli), etc.

8.1.7 Based on the future tourist arrivals and their stay patterns, the future capacity requirement in accommodation has been worked out for the main hubs in the state. The existing demand supply gaps and future peak time capacity requirement for accommodation for important locations in the state is provided below in Exhibit 8.2. (The detailed calculations are provided in Appendix 8)

8.1.8 As seen from Exhibit 8.2, presently there is an aggregate overcapacity in accommodation availability in the state. Current occupancy levels at most tourist locations in the state are in the range of 80-85%. However, at a micro level, there is a shortfall in specific categories of hotels at certain locations based on peaktime tourist arrivals. Based on the future trends in tourist arrivals and their stay patterns, it is estimated that there would be a shortfall of about 36,000 rooms in Rajasthan by 2021.

8.1.9 A seen from the Exhibit 8.2, although there is an overall overcapacity in the aggregate room availability in the state at present, there is an actual shortfall of approx. 285 accommodation units in different parts of the state. By year 2006 i.e. in short term, approx. 425 new accommodation units would have to be created mostly in 'others' (dormitories, budget hotels, dharamshalas, paying guest accommodation, etc.) category. Similarly, going by present availability of accommodation in the state there would be a need for approx. 600 accommodation units by 2011 and approx. 850 units by 2021.

Exhibit 8.2

Accommodation: Existing Status and Future Peak Time Capacity Requirement

Location	Category	Present Capacity (No. of Rooms)	Estimated Future Peak Capacity Requirement (Rooms)				Estimated Additional Number of Hotels Required (Illustrative)			
		2001	2002	2006	2011	2021	2002	2006	2011	2021
Jaipur	Luxury	1392	594	708	811	998	0	0	0	0
	Mid-priced	1050	1359	1569	1762	1671	6	10	14	14
	Economy	2000	1696	1924	2135	1930	0	0	5	5
	Others	715	514	584	648	419	0	0	0	0
		5157	4163	4785	5357	5018	6	10	19	19
Alwar	Luxury	105	56	69	106	142	0	0	0	1
	Mid-priced	160	82	104	139	185	0	0	0	0
	Economy	150	52	69	77	102	0	0	0	0
	Others	84	15	19	26	34	0	0	0	0
		499	205	261	348	462	0	0	0	1
Bharatpur	Luxury	0	35	41	55	87	0	0	1	1
	Mid-priced	120	66	74	96	147	0	0	0	1
	Economy	30	51	56	70	105	1	1	1	3
	Others	45	13	15	19	28	0	0	0	0
		195	166	185	239	369	1	1	2	4
Sawai Madhopur	Luxury	70	68	92	126	177	0	0	1	2
	Mid-priced	40	103	131	173	237	1	2	3	4
	Economy	180	65	78	100	134	0	0	0	0
	Others	20	22	26	33	45	0	1	1	2
		310	257	328	433	593	1	3	5	8
Ajmer	Luxury	0	88	111	142	191	1	1	1	2

Location	Category	Present Capacity (No. of Rooms)	Estimated Future Peak Capacity Requirement (Rooms)				Estimated Additional Number of Hotels Required (Illustrative)			
	Mid-priced	60	392	495	632	849	7	9	11	16
	Economy	1000	1525	1925	2457	3300	17	31	49	77
	Others	700	1826	2305	2942	3952	113	161	224	325
		1760	3831	4836	6173	8291	138	201	286	420
Pushkar	Luxury	640	716	906	1157	1549	1	3	5	9
	Mid-priced	250	782	993	1268	1691	11	15	20	29
	Economy	840	1356	1765	2253	2909	17	31	47	69
	Others	180	1033	1351	1724	2215	85	117	154	203
		1910	3888	5015	6401	8365	114	165	227	310
Jodhpur	Luxury	750	150	194	241	268	0	0	0	0
	Mid-priced	350	285	334	396	476	0	0	1	3
	Economy	1050	414	444	501	652	0	0	0	0
	Others	360	115	125	141	183	0	0	0	0
		2510	964	1096	1279	1578	0	0	1	3
Jaisalmer	Luxury	150	155	209	304	375	0	1	2	2
	Mid-priced	480	294	392	559	693	0	0	2	4
	Economy	640	190	241	318	400	0	0	0	0
	Others	125	56	72	95	120	0	0	0	0
		1395	694	913	1276	1588	0	1	3	7
Bikaner	Luxury	440	69	96	129	157	0	0	0	0
	Mid-priced	50	128	160	200	235	2	2	3	4
	Economy	525	183	206	237	267	0	0	0	0
	Others	120	51	58	67	76	0	0	0	0
		1135	432	520	633	735	2	2	3	4
Udaipur	Luxury	780	695	788	901	1125	0	0	1	3
	Mid-priced	350	605	659	726	861	5	6	8	10

Location	Category	Present Capacity (No. of Rooms)	Estimated Future Peak Capacity Requirement (Rooms)				Estimated Additional Number of Hotels Required (Illustrative)			
	Economy	1890	1307	1378	1468	1657	0	0	0	0
	Others	616	253	269	289	331	0	0	0	0
		3636	2861	3093	3385	3974	5	6	9	14
Chittaurgarh	Luxury	40	21	22	24	27	0	0	0	0
	Mid-priced	400	26	28	29	33	0	0	0	0
	Economy	990	71	74	77	86	0	0	0	0
	Others	70	13	13	14	16	0	0	0	0
		1500	131	137	145	161	0	0	0	0
Nathdwara	Luxury	0	77	94	114	132	1	1	2	2
	Mid-priced	200	103	125	152	176	0	0	0	0
	Economy	360	282	343	417	484	0	0	2	4
	Others	210	51	62	76	88	0	0	0	0
		770	513	624	759	881	1	1	4	6
Mount Abu	Luxury	140	265	289	320	356	1	1	2	2
	Mid-priced	40	781	847	936	1036	15	16	18	20
	Economy	1530	1292	1399	1545	1707	0	0	0	6
	Others	315	259	280	310	342	0	0	0	3
		2025	2596	2815	3111	3441	16	18	20	31
Banswara	Luxury	0	77	94	114	132	1	1	2	2
	Mid-priced	80	103	125	152	176	0	1	1	2
	Economy	180	282	343	417	484	3	5	8	10
	Others	0	51	62	76	88	5	6	8	9
		260	513	624	759	881	10	14	19	23
Kota	Luxury	240	15	27	45	74	0	0	0	0
	Mid-priced	0	20	36	59	94	0	1	1	2
	Economy	120	46	81	130	196	0	0	1	3

Location	Category	Present Capacity (No. of Rooms)	Estimated Future Peak Capacity Requirement (Rooms)				Estimated Additional Number of Hotels Required (Illustrative)			
	Others	100	30	53	85	126	0	0	0	3
		460	110	196	320	491	0	1	2	7
Shekhawati	Luxury	429	58	129	204	340	0	0	0	0
	Mid-priced	45	39	79	120	193	0	1	1	3
	Economy	150	25	38	51	72	0	0	0	0
	Others	20	9	17	24	38	0	0	0	2
		644	130	263	399	643	0	1	2	5
Total	**Luxury**	**5176**	**3140**	**3868**	**4793**	**6130**	**5**	**8**	**16**	**27**
	Mid-priced	**3675**	**5168**	**6150**	**7398**	**8753**	**47**	**63**	**84**	**111**
	Economy	**11635**	**8836**	**10363**	**12255**	**14486**	**39**	**68**	**113**	**176**
	Others	**3680**	**4312**	**5310**	**6570**	**8101**	**203**	**284**	**388**	**547**
		24166	***21455***	***25691***	***31016***	***37471***	***294***	***423***	***601***	***861***

8.1.10 The investment requirement for the hotel projects and its phasing is provided in Exhibit 8.3

Exhibit 8.3

Hotel Projects: Investment and Phasing

Category	By 2006 (Short term)			2007-2011 (Medium term)			2012-2021 (Long term)			Total		
	No. of Hotels	No of Rooms	Invst. (Rs. Lakhs)	No. of Hotels	No of Rooms	Invst. (Rs. Lakhs)	No. of Hotels	No of Rooms	Invst. (Rs. Lakhs)	No. of hotels	No of Rooms	Invst. (Rs. Lakhs)
Luxury	8	800	17600	8	800	17600	11	1100	24200	27	2700	59400
Mid-priced	63	3150	25200	21	1050	8400	27	1350	10800	111	5550	44400
Economy	68	2040	6120	45	1350	4050	63	1890	5670	176	5280	15840
Others	284	2840	2840	104	1040	1040	159	1590	1590	547	5470	5470
Total	**423**	**8830**	**51760**	**178**	**4240**	**31090**	**260**	**5930**	**42260**	**861**	**19000**	**125110**

Note: (1) Refer Appendix 8 for the detailed calculations and assumptions
(2) Investment requirement is based on the following assumptions
Luxury : 100 rooms @ Rs. 22 Lakh/ Room
Mid-priced : 50 rooms @ Rs. 8 Lakhs/ Room
Economy : 30 rooms @ Rs. 3 Lakhs/ Room

8.1.11 It is estimated that in the next 20 years, approx. Rs. 1250 Cr. would be needed in creating additional accommodation capacity in the state. As has been the trend in the past, the investment in hotel infrastructure in the state would mostly come from the private sector. Foreign investors, especially the hotels chains, would have to be invited to invest in the luxury category (5-star deluxe, 5-star and 4-star) of hotels.

Resorts and Camping Sites

8.1.12 In addition to the standard forms of accommodation facilities (hotels and paying guest), accommodation in form of resorts and camping sites have also been proposed in the perspective plan.

8.1.13 Accommodation capacity at a place is incidental upon the tourist arrivals which in turn is dependent upon the tourist attractions / tourism products in the place. In contrast, the resort itself being an independent attraction / tourism product, the resort facilities and room capacity can influence the tourist arrivals. The capacity of the resorts is recommended based upon our understanding of the carrying capacity of the place. Exhibit 8.3 provides a comprehensive list of proposed resort/ camping site projects in the state.

Exhibit 8.3

Resort and Camping Sites Projects in Rajasthan

Sr. No.	District	Location	Category	Est. Cost (Rs. Lakhs)	Suggested Investor	Phasing
1	Jodhpur	Kheechan	Resort	150.00	Private	MT
2	Jodhpur	Surrounding locations	Camping sites (30 tents)	10.00	Private	MT
3	Jaisalmer	Sam	Camping Site	20.00	Private	ST
4	Jaisalmer	Satta	Hotel cum Resort	50.00	Private	MT
5	Jaipur	Jatwada	Hotel Resort	150.00	Private	MT
6	Jaisalmer	Amar Sagar	Hotel Resort	65.00	Private	MT
7	Jaisalmer	Satta	Hotel Resort	150.00	Private	MT

Sr. No.	District	Location	Category	Est. Cost (Rs. Lakhs)	Suggested Investor	Phasing
8	Jaisalmer	Rupsi	Resort	15.00	Private	MT
9	Jaisalmer	Kanoi	Resort	15.00	Private	LT
10	Jaisalmer	Sam	Resort	15.00	Private	MT
11	Jaisalmer	Badabag	Resort	150.00	Private	LT
12	Udaipur	Sarada	Resort	150.00	Private	LT
13	Udaipur	Sisarma	Resort	150.00	Private	LT
14	Udaipur	Jaisamand	Water resort (30 room)	300.00	Private	ST
15	Jaipur	Sanganer	Resort	200.00	Private	LT
16	Jaipur	Kot	Resort	175.00	Private	MT
17	Jaipur	Sanganer	Resort	250.00	Private	LT
18	Jaipur	Amer	Resort	150.00	Private	LT
19	Jaipur	Achrol	Resort	150.00	Private	MT
20	Jaipur	Sambhar Lake	Resort	150.00	Private	MT
21	Jaipur	Kukas	Resort	150.00	Private	LT
22	Jaipur	Bishanpura	Resort	150.00	Private	MT
23	Pali	Bali	Resort	150.00	Private	ST
24	Sirohi	Banas	Hotel Resort	150.00	Private	LT
25	Sirohi	Barighata	Resort	300.00	Private	MT
26	Sirohi	Bari	Resort	150.00	Private	LT
27	Nagaur	Panwadi	Resort (20 tents)	150.00	Private	ST
28	Ajmer	Devnagar	Resort	670.00	Private	MT
29	Nagaur	Kuchaman	Tented accommodation	20.00	Private	ST
30	Alwar	Behror	Resort	45.00	Private	MT
31	Alwar	Behror	Resort	52.00	Private	MT
32	Alwar	Livari	Resort	150.00	Private	MT
33	Alwar	Alwar	Resort	150.00	Private	MT
34	Alwar	Sariska	Forest Resort (50 rooms)	650.00	Private	ST
35	Alwar	Siliserh	Water Resort with water sports (40 rooms)	400.00	Private	MT
36	Alwar	Jaisamand	Water Resort	400.00	Private	MT
37	S. Madhopur	Khilchipur	Hotel Resort	345.00	Private	ST
38	S. Madhopur	Sherpura	Hotel Resort	150.00	Private	ST
39	S. Madhopur	Khilchipur	Resort	130.00	Private	MT
40	S. Madhopur	Sherpur	Resort	45.00	Private	MT
41	S. Madhopur	Sherpur	Resort	150.00	Private	LT
42	S. Madhopur	Sherpura	Resort	150.00	Private	LT
43	S. Madhopur	Khilchipur	Resort	150.00	Private	LT
44	Kota	Naya Kheda	Resort	150.00	Private	ST
45	Banswara	Mahi Bajaj Sagar Dam	Resort	300.00	Private	ST
	Total			**7772.00**		

8.1.14 Thus, an estimated Rs. 75 Cr. would be spent on constructing new resorts/ camping sites in the state. Private sector would be responsible for creating this tourism asset. Exhibit 8.4 provides the details of investment requirement and phasing for resort and camping sites projects in Rajasthan.

Exhibit 8.4

Resort / Camping Sites Projects: Investment and Phasing

	By 2006 (Short term)		2011 (Medium term)		2021 (Long term)		Total	
	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)
Resorts / Camping sites	**10**	**2235**	**22**	**3572**	**13**	**1965**	**45**	**7772**

Wayside Facilities

8.1.15 Based on the traffic and tourist movement analysis in the individual circuits, 17 new midways / wayside facilities have been proposed in the Rajasthan. Besides the new midways, augmentation of the midway at Gulabpura in Bhilwara district has also been proposed. The proposed wayside facilities in the state are indicated in Exhibit 8.5

Exhibit 8.5

Proposed Wayside Facilities

Sr. No.	District	Location	Type of Project	Route catered	Est. Cost (Rs. Lakhs)	Suggested Investor	Phasing
1	Barmer	Pachpadra	Motel (with stay facility) / Midway	Jodhpur–Barmer (via Kalyanpur) Mt. Abu–Barmer (via Jalore)	50.00	Private	ST
2	Barmer	Shiv	Midway	Jaisalmer–Barmer (NH15) Jodhpur–Barmer (via Shergarh)	30.00	Private	ST
3	Bikaner	Nokhra	Midway	Jaisalmer–Bikaner (NH15)	30.00	Private	ST
4	Udaipur	Jaisamand	Motel (with stay facility)	Udaipur–Jagat–Jaisamand Lake–Chawand–Rikhabdeo	50.00	Private	ST
5	Chittaurgarh	Menal	Motel	Chittaurgarh–Kota (NH64)	50.00	Private	ST
6	Rajsamand	Bhutala	Wayside facility	Kumbhalgarh–Udaipur	30.00	Private	ST
7	Jaipur	Chomu	Wayside facility	Jaipur-Shekhawati	30.00	Private	ST
8	Dausa	Lolsot	Wayside facility	Dausa-Sawai Madhopur	30.00	Private	ST
9	Tonk	Tonk	Midway	Jaipur-Sawai Madhopur	30.00	Private	ST
10	Sirohi	Abu Road	Wayside facility	Udaipur-Mount Abu, Ahmedabad–Mount Abu	50.00	Private	ST
11	Pali	Pali	Wayside facility	Abu Road-Jodhpur	30.00	Private	ST
12	Jalore	Jalore	Midway	Jalore	30.00	Private	ST

Sr. No.	District	Location	Type of Project	Route catered	Est. Cost (Rs. Lakhs)	Suggested Investor	Phasing
13	Bhilwara	Gulabpura	Augmentation of Midway	Bhilwara-Ajmer State highway (part of the Mumbai–Delhi route via Ahmedabad)	20.00	Private	ST
14	Sikar	Reengus	Midway	Jaipur–Sikar–Bikaner (NH11)	30.00	Private	ST
15	Jhunjhunun	Mukundgarh	Midway	Sikar-Jhunjhunun (SH)	30.00	Private	ST
16	Tonk	Tonk	Wayside facility	Jaipur–Tonk-Sawai Madhopur	30.00	Private	ST
17	Dausa	Lalsot	Wayside facility	Jaipur–Dausa-Sawai Madhopur	30.00	Private	ST
18	Alwar	Kishangarh	Wayside facility	Delhi–Tijara–Kishengarh–Alwar	30.00	Private	ST
19	Dungarpur	Khairwara	Wayside facility	Udaipur-Dungarpur (on NH8)	30.00	Private	ST
20	Dungarpur	Bicchwada	Wayside facility	Ahmedabad-Dungarpur (on NH8)	30.00	Private	ST
21	Banswara	Danpur	Wayside facility	Ratlam-Banswara	30.00	Private	ST
	Total				**700.00**		

8.1.16 A total of Rs. 7 Cr. would be required for developing and augmenting wayside facilities in the state. Investment in wayside facilities has been proposed in the first 3 years of the perspective plan as it is primarily for improvement of direct tourism related facilities and hence should be taken up on priority basis.

8.1.17 Since its creation, RTDC has been responsible for constructing and managing the wayside facilities in the state. However, in the recent years RTDC has licensed out many of its properties (including wayside facilities) to private parties for management. The investment in the new wayside facilities would largely come from the private parties. Exhibit 8.6 provides the details of investment requirement and phasing for wayside facilities in Rajasthan.

Exhibit 8.6

Wayside Facilities: Investment and Phasing

	By 2006 (Short term)		**2011 (Medium term)**		**2021 (Long term)**		**Total**	
	No. of units	Investment (Rs. Lakhs)	No. of units	Investment (Rs. Lakhs)	No. of units	Investment (Rs. Lakhs)	No. of units	Investment (Rs. Lakhs)
Wayside facilities	**21**	**700**	**0**	**0**	**0**	**0**	**21**	**700**

Tourist Offices

8.1.18 Based on the trends in tourist arrivals at different locations and focus on development of lesser-explored tourist locations in Rajasthan, 10 new tourist information offices have been proposed in the state. These consist of a mix of Tourist Information Bureaus, Tourist Reception Centres and Tourist Information Kiosks.

8.1.19 The function of Tourist Information Kiosk located at the tourist site would be to provide the visiting tourists with guide services (only those guides registered with the DoT). The idea behind the concept of Information kiosk is to limit the 'lapka' menace and safeguard the tourist from unscrupulous elements in the business.

8.1.20 The list of proposed tourist offices in the state is provided in Exhibit 8.7

Exhibit 8.7

Proposed Projects for Tourist Information Offices

Sr. No.	District	Location	Tourist Information Office	Est. Cost (Rs. Lakhs)	Suggested Investor	Phasing
1	Jodhpur	Osiyan	Tourist Information Kiosk	5.00	DoT/ RTDC	ST
2	Jodhpur	Mehrangarh Fort	Tourist Information Kiosk	5.00	DoT/ RTDC	ST
3	Jaisalmer	Jaisalmer Fort	Tourist Information Kiosk	5.00	DoT/ RTDC	ST
4	Banswara	Danpur	Tourist Information Kiosk	5.00	DoT/ RTDC	LT
5	Banswara	Banswara	Tourist Reception Centre	15.00	Local Hotel Association	MT
6	Dungarpur	Ratanpur	Tourist Information Kiosk	5.00	DoT/ RTDC	ST
7	Nagaur	Merta	Tourist Information Kiosk	5.00	DoT/ RTDC	ST
8	Sikar	Fatehgarh	Tourist Information Bureau	15.00	Local Hotel Association	ST
9	Jhunjhunun	Nawalgarh	Tourist Information Kiosk	5.00	DoT/ RTDC	ST
10	Jhunjhunun	Mukundgarh	Tourist Information Kiosk	5.00	DoT/ RTDC	ST
	Total			**70.00**		

8.1.21 A total investment of approx. Rs. 70 lakhs would be required for Tourist Information Offices in the state. Investment in most of these tourist offices is suggested to be done in the short term (first 5 years) of the perspective plan. To regulate the quality of information disseminated to the tourists and to maintain objectivity while guiding, it is proposed that the investment and management of the proposed tourist information offices be taken over by DoT/ RTDC.

8.1.22 Exhibit 8.8 provides the details of investment requirement and phasing for wayside facilities in Rajasthan.

Exhibit 8.8

Tourist Offices: Investment and Phasing

	By 2006 (Short term)		**2011 (Medium term)**		**2021 (Long term)**		**Total**	
	No. of units	Investment (Rs. Lakhs)	No. of units	Investment (Rs. Lakhs)	No. of units	Investment (Rs. Lakhs)	No. of units	Investment (Rs. Lakhs)
Tourist offices	**8**	**50**	**1**	**15**	**1**	**5**	**10**	**70**

Travel Links and Transport Connectivity Infrastructure

Air

8.1.23 Of the 6 civil airports in the state, Jodhpur, Jaisalmer and Bikaner have airstrips under the control of the Indian Air Force (IAF) with the runway shared by the civilian aircrafts and IAF. Presently, regular flights are operational from Jaipur, Udaipur and Jodhpur only.

- **Jodhpur**: The current runway can only handle smaller aircraft- AT7 (62 seater) operated by Jet Airways and 737-100/200 (~110 seater) operated by Alliance Air. However, with only 6 flights per day the airport capacity is sufficient to meet short / medium term needs. In long term, there is a need to upgrade the airport at Jodhpur to handle bigger aircraft (Boeing 737) with a scope for future expansion to Airbus A320, which can facilitate direct flight services to Jodhpur.
- Also, based on the future arrival forecast at the Jodhpur airport, a separate airport terminal is required in Jodhpur in the longer term.
- **Bikaner**: A separate airstrip is recommended at Bikaner. There is an unused airstrip in Bikaner under the control of the state government. This could be upgraded to facilitate small and medium capacity aircrafts. At the same time, domestic carriers should be encouraged to start flight services to Bikaner. This project could be undertaken over a long term.
- **Udaipur**: The current runaway at Maharana Pratap Airport, Dabok can only handle smaller aircraft (737-200 and A37 type aircraft). There is a need to extend the runaway to handle bigger aircraft over the medium/ long term.
- **Ajmer/ Pushkar**: An airstrip, which would handle small and medium capacity aircrafts, is recommended near Ajmer. A small terminal to handle tourist traffic is also proposed to be constructed. Domestic air taxi operators should be invited to start flight services to Ajmer from Delhi and Mumbai. On this front, AAI has recently commissioned a feasibility study for construction of a domestic airport at Ajmer. This project is expected to cost Rs. 2500 Lakhs and would be undertaken over the next 5 years.
- **Jaipur**: Jaipur Airport is being developed as an International Airport, by extending the runway from 7500 feet to 12000 feet (including building of culverts). Phase I envisages construction of RCC culverts and extension of runway from 7500 feet to 9000 ft while Phase II encompasses extension from 9000 feet to 12000 feet. Other works such as parking aprons, taxi track and international terminal building is also proposed to be carried out. The total cost of the proposed work is estimated to be Rs. 7700 Lakhs. Since the funds for the project have already been allocated and the project implementation work is already underway, it has not been excluded from the list.
- **Others**: Helipads to cater to tourist arrivals in Dungarpur, Kota and Mount Abu is proposed to be constructed in the medium term. The estimated cost of the three helipads with the associated passenger’s terminals would be around Rs. 750 Lakhs.

8.1.24 Exhibit 8.9 shows air connectivity upgradation projects identified for Rajasthan.

Exhibit 8.9

Proposed Projects for Air Connectivity Upgradation

Sr. No.	Airport	Project	Est. Cost (Rs. Lakhs)	Suggested Investor	Phasing
1	Jodhpur	Runway extension and airport terminal	4600.00	To be identified	LT
2	Jaisalmer	Development of new airstrip	1500.00	To be	MT

				identified	
3	Bikaner	Development of new airstrip	1500.00	AAI	LT
4	Udaipur	Runway extension	1500.00	AAI	MT
5	Ajmer / Pushkar	Development of airstrip and terminal	2500.00	AAI	ST
6	Mount Abu / Kota/ Dungarpur	Development of helipads	750.00	PWD	MT/ LT
	Total		**12350.00**		

8.1.25 A total of approx. Rs. 124 Cr. would be needed on additional infrastructure for air connectivity. Exhibit 8.10 provides the details of investment requirement and phasing for air connectivity projects in Rajasthan.

Exhibit 8.10

Air Connectivity Projects: Investment and Phasing

	By 2006 (Short term)		**2011 (Medium term)**		**2021 (Long term)**		**Total**	
	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)
Airports / Airstrips /	1	2500.00	2	3000.00	2	6100.00	5	11600.00
Helipads	--	--	3	750.00	--	--	3	750.00
Total	**1**	**2500.00**	**5**	**3750.00**	**2**	**6100.00**	**8**	**12350.00**

Roads

8.1.26 The DoT has proposed works amounting to Rs. 5382.07 Lakhs for road development and repairs for tourist locations in the state. (This has been discussed earlier in Chapter 6 on a circuit-wise basis). Some of these projects are already underway. To ensure smooth flow of tourists and accessibility of the tourist attractions, it is recommended that the remaining works be carried out in the short term (within the next 5 years). Exhibit 8.11 provides details of investment requirement and phasing for road connectivity projects in Rajasthan.

Exhibit 8.11

Road Connectivity Projects: Investment and Phasing

	By 2006 (Short term)		**2011 (Medium term)**		**2021 (Long term)**		**Total**	
	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)
Link roads / Approach roads	**--**	**5382.07**	**--**	**--**	**--**	**--**	**--**	**5382.07**

8.1.27 The main implementing agency for road projects in the state would be the Public Works Department (PWD). Besides PWD other agencies like Forest Department (approach roads to sanctuaries) and private owners (approach roads to hotels, resorts, amusement parks and other private properties) would also be responsible for development of roads falling within respective interest areas.

8.1.28 Of the projects identified by DoT, some road links need to be prioritised for carrying repairs are listed below in Exhibit 8.12. These road projects should be carried out as soon as possible.

Exhibit 8.12

Road Projects: Priority from Tourist Access Viewpoint

Sr. No.	Districts	Route	Type of Work	Est. Cost (Rs. Lakhs)	Investor/ Implementor	Phasing
1	Jodhpur	Jodhpur to Osiyan (58 Kms)	Repairs	87.00	PWD	ST
2	Bikaner	Gajner to Jaisalmer-Bikaner highway (4 Kms)	Repairs	10.00	PWD	ST
3	Udaipur	Udaipur–Jagat–Jaisamand–Chavand-Rikhabdeo (120 Kms)	Repairs	240.00	PWD	ST
4	Dungarpur	Bhantara Darwaza–Udai Bilas Palace (1.5 Kms)	Repairs	5.00	PWD	ST
5	Dausa	Sikandra (NH11) to Abhaneri (7 Kms)	Repairs	25.00	PWD	ST
6	Tonk / Sawai Madhopur	Tonk-Sawai Madhopur (77 Kms)	Repairs	120.00	PWD / Forest Dept.	ST
7	Ajmer	Ajmer to Pushkar (11 Kms)	Repairs	20.00	PWD	ST
8	Jhunjhunun	Khetri to Jhunjhunun (40 Kms)	Repairs	200.00	PWD	ST
9	Jhunjhunun / Sikar	Jhunjhunun to Mukundgarh-Nawalgarh-Sikar (70 Kms)	Repairs	350.00	PWD	ST
10	Jhunjhunun	Jhunjhunun to Mandawa-Fatehpur (48 Kms)	Repairs	250.00	PWD	ST
11	Sikar / Churu	Sikar to Salasar (82 Kms)	Repairs	240.00	PWD	ST
12	Churu	Salasar to Talchappar (36 Kms)	Repairs	110.00	PWD / Forest Dept.	ST
		Total		**1657.00**		

Development of Tourist Spots / Tourist Site Enhancement

8.1.29 Several projects for development of tourist sites (new and old) and tourist site enhancement have been proposed. A list of such projects with the associated cost estimates and phasing is provided in Exhibit 8.13.

Exhibit 8.13

Proposed Projects for Developing of Tourist Spots/ Site Enhancement

Sr. No.	District	Location	Project	Est. Cost (Rs. Lakhs)	Suggested Investor	Phasing
1	Jodhpur	Jodhpur	Light and sound show at Mehrangarh fort	150.00	Private	ST
2	Jodhpur	Osiyan	Development of ‘tourist walkway’ in the town	30.00	Collector	MT
3	Jodhpur	Osiyan	Restoration and conservation of step-well and temples	25.00	Private with ASI	MT
4	Jaisalmer	Jaisalmer Fort	Development of waste disposal systems	100.00	UIT	LT
5	Udaipur	Udaipur	Development of effluent disposal system for the old city – Cleaning of Lake Picchola	100.00	UIT	ST
6	Udaipur	Udaipur	Development of lake side	120.00	Private	LT

Sr. No.	District	Location	Project	Est. Cost (Rs. Lakhs)	Suggested Investor	Phasing
			promenade along Fateh Sagar Lake			
7	Udaipur	Jagat	Landscaping and flood lighting of the temple complex	10.00	Private	ST
8	Udaipur	Chawand	Landscaping of the Rana Pratap Memorial	5.00	Private	ST
9	Udaipur	Jaisamand	Development of Public Garden at the lake site	10.00	Private	ST
10	Rajsamand	Eklingji	Development of parking place near the temple complex	15.00	PWD	ST
11	Dausa	Dausa	Refurbishment of Abhaneri well	25.00	ASI	MT
12	Dausa	Dausa	Conservation of Geejgarh Fort	7.00	A & M	MT
13	Tonk	Tonk	Refurbishment of wells near Todaraisingh	10.00	A & M	MT
14	Pali	Ranakpur	Landscaping of Ranakpur temple complex	40.00	Temple Trust	MT
15	Ajmer	Ajmer	Development of gardens at Foy Sagar	10.00	Private	MT
16	Ajmer	Ajmer	Construction of pilgrim complex consisting of waiting rooms, dining facilities, toilets, etc. near the shrine	100.00	UIT	ST
17	Ajmer	Baghera	Development of basic tourist facilities (TRC & hotel)	100.00	RTDC	ST
18	Ajmer	Roopangarh	Enhancement of the fort premises and approach roads	20.00	Private	MT
19	Nagaur	Nagaur	Restoration of the Fort precincts	20.00	Private	MT
20	Alwar	Alwar Palace Complex	Restoration of Palace and floodlighting of the Moosi Rani Cenotaph and the Sagar Tank	200.00	RTDC	ST
21	Alwar	Alwar Fort	Sound and light Show	150.00	Private	LT
22	Bharatpur	Deeg	Restoration of Deeg Palace and convert a part for hosting cultural events	300.00	Private	MT
23	Jhunjhunun and Sikar	Nawalgarh, Mandawa, Mukundgarh	Creation of heritage walkways connecting various havelis in the town	45.00	Community	MT
24	Banswara	Baneshwar	Creation of Tribal Cultural Centre	200.00	Community	MT
	Total			**1792.00**		

8.1.30 Development of tourist sites could be with private sector investment (including NGOs for restoration projects) wherein DoT could identify such projects and invite private sector to undertake enhancement / beautification work. Local community also has a responsibility in maintenance of the sites and creating basic tourist facilities. Exhibit 8.14 provides the details of investment requirement and phasing for tourist site enhance in Rajasthan.

Exhibit 8.14

Tourist Site Enhancement: Investment and Phasing

	By 2006 (Short term)		2011 (Medium term)		2021 (Long term)		Total	
	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)
Tourist site enhancement	**9**	**690.00**	**12**	**732.00**	**3**	**370.00**	**23**	**1792.00**

Sanctuaries / Eco-tourism

8.1.31 Rajasthan Forest Department has identified a total of 20 eco-tourism projects to be implemented in the state within the next 5 years. The estimated spend on these projects is close to Rs. 574 Lakhs with almost 50% investment coming in the first two years. The details of the investment allocation and phasing is provided in Exhibit 8.15

Exhibit 8.15

Eco-tourism Projects: Investment and Phasing

Sr. No.	District	Name of Protected Area / Spot	Est. Cost (Rs. Lakhs)	Investor	Phasing
1	Udaipur	Jaisamand Wildlife Sanctuary	70.00	Forest Dept.	ST
2	Udaipur	Sajjangarh Wildlife Sanctuary	50.00	Forest Dept.	ST
3	Udaipur	Kumbhalgarh Wildlife Sanctuary	85.00	Forest Dept.	ST
4	Udaipur	Raoli Todgarh Wildlife Sanctuary	65.00	Forest Dept.	ST
5	Udaipur	Phulwari Ki Nal Wildlife Sanctuary	35.00	Forest Dept.	ST
6	Sirohi	Mount Abu Wildlife Sanctuary	71.00	Forest Dept.	ST
7	Jaisalmer	Desert National Park Wildlife Sanctuary	29.50	Forest Dept.	ST
8	Churu	Talchappar Wildlife Sanctuary	17.00	Forest Dept.	ST
9	Kota	Darrah Wildlife Sanctuary	17.00	Forest Dept.	ST
10	Bundi	Ramgarh Vishdhari Wildlife Sanctuary	23.50	Forest Dept.	ST
11	Alwar	Kankwari Fort, Sariska	12.00	Forest Dept.	ST
12	Jodhpur	Kheechan, Phalodi	10.50	Forest Dept.	ST
13	Jaipur	Myla Bagh, Jaipur	4.00	Forest Dept.	ST
14	Alwar	Tehla Fort, Alwar	14.00	Forest Dept.	ST
15	Alwar	Kushalgarh Fort, Sariska	10.00	Forest Dept.	ST
16	Baran	Shergarh Fort, Baran	10.75	Forest Dept.	ST
17	Baran	Shahbad, Baran	14.50	Forest Dept.	ST
18	Sawai Madhopur	Khandar Fort, Sawai Madhopur	14.50	Forest Dept.	ST
19	Kota	Sorsan, Kota	12.50	Forest Dept.	ST
20	Karauli	Udgir Fort	8.25	Forest Dept.	ST
	Total		**574.00**		

8.1.32 The responsible agency for implementing these eco-tourism projects in the state is primarily the State Forest Department. Sponsorship could be sought from the private sector/ corporates like hotels, tourist agencies, tour operators, etc. to fund and promote eco-tourism projects. Exhibit 8.16 provides the details of investment requirement and phasing for sanctuaries/ eco-tourism projects in Rajasthan.

Exhibit 8.16

Sanctuaries / Eco-tourism projects: Investment and Phasing

	By 2006 (Short term)		2011 (Medium term)		2021 (Long term)		Total	
	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)
Sanctuaries / Eco tourism	**20**	**574.00**	**0**	**0**	**0**	**0**	**20**	**574.00**

Tourism Products (Cultural Complexes, Adventure Tourism, Aqua Tourism, etc.)

8.1.33 Apart from core tourism infrastructure projects, some tourism products have are also proposed at the individual circuit / location level. A list of such products with the associated cost estimates and phasing is provided in Exhibit 8.17.

Exhibit 8.17

Proposed Tourism Products

Sr. No.	District	Location	Project	Est. Cost (Rs. Lakhs)	Suggested Investor	Phasing
1	Jaisalmer	Desert	Desert car rally	50.00	RTDC	LT
2	Bikaner	Surrounding villages	Rural tourism	20.00	Local Community/ Co-operative	ST
3	Bikaner	Sattasar, Kharbara	Canal Safaris (in the IGNP Canal)	50.00	RTDC / Irrigation Dept.	LT
4	Rajsamand	Kumbhalgarh	Ropeway	1600.00	Private	ST
5	Rajsamand	Rajsamand	Boating facilities (motor boats, paddle boats, water scooters, water skiing, etc.)	50.00	Private	MT
6	Udaipur	Jaisamand	Trekking camps	10.00	Private	ST
7	Udaipur	Jaisamand	Water Sports events (Rowing championships)	100.00	Private	ST
8	Banswara	Mahi Dam canals	Canal Safaris	100.00	RTDC / Irrigation Dept.	ST
9	Dungarpur	Dungarpur	Boating facilities (paddle boats)	30.00	Private	MT
10	Chittaurgarh	Chittaurgarh	Hand gliding/ Paragliding	100.00	Private	MT
11	Jaipur	Nahargarh Fort	Theme Village	300.00	Private	MT
12	Jaipur	Jaipur	Cultural Complex	800.00	Private	MT
13	Jaipur	Jaipur	Handicrafts Plaza	500.00	Local Community/ Co-operative	ST
14	Sirohi	Mount Abu	Handgliding/ Paragliding	100.00	Private	MT
15	Sirohi	Mount Abu	Jungle treks/ trails alongwith camping sites	150.00	Private	ST
16	Sirohi	Mount Abu	Mountaineering training centres	100.00	Private	ST
17	Ajmer	Kishengarh	Artists’ village	30.00	Local Community/ Co-operative	MT

Sr. No.	District	Location	Project	Est. Cost (Rs. Lakhs)	Suggested Investor	Phasing
18	Alwar	Alwar-Delhi Road	Golf Course and Resort	800.00	Private	ST
19	Sawai Madhopur	Sawai Madhopur	Cultural Complex	800.00	Private	MT
20	Jhunjhunun / Sikar / Churu	1 - 2 towns in the Shekhawati region	Open air art galleries / Art interpretation and education complex	100.00	Private	ST
21	Banswara	Canals of the Mahi Bajaj Sagar Dam	Canal Safaris	200.00	Private	LT
	Total			**5990.00**		

8.1.34 Development of tourism products would be primarily the private sectors' responsibility. The State Government (DoT) would create the necessary mechanism for inviting and clearing private sector investment proposals.

8.1.35 It is recommended that community participation be sought in projects like artists' villages, cultural complexes, handicrafts plazas, etc. Exhibit 8.18 provides the details of investment requirement and phasing for tourism products in Rajasthan.

Exhibit 8.18

Tourism Products: Investment and Phasing

	By 2006 (Short term)		2011 (Medium term)		2021 (Long term)		Total	
	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)
Tourism products	**10**	**3480.00**	**8**	**2210.00**	**3**	**300.00**	**21**	**5990.00**

8.2 CATEGORY-WISE AND INVESTOR-WISE SUMMARY OF PROJECTS

8.2.1 Exhibit 8.19 provides the category-wise summary of proposed investment in tourism infrastructure and its phasing in the state.

Exhibit 8.19

Summary of Investment and Phasing

Sr. No	Category	Total Investment (Rs. Lakhs)	Phasing		
			Short term	Medium Term	Long Term
1	**Connectivity Infrastructure**	**17732**	**7882**	**3750**	**6100**
	• Airports/ helipads	12350	2500	3750	6100
	• Link Roads/ Approach roads	5382	5382	0	0
2	**Tourism Related Infrastructure**	**142008**	**59489**	**37619**	**44900**
	• Hotels	125110	51760	31090	42260
	• Resorts/ Camping Sites	7772	2235	3572	1965
	Sub-total	*132882*	*53995*	*34662*	*44225*
	• Wayside Facilities	700	700	0	0

	• Tourist Offices	70	50	15	5
	• Tourist site enhancement	1792	690	732	370
	• Sanctuaries/ Eco-tourism	574	574	0	0
	• Tourism Products	5990	3480	2210	300
	Total	**159740**	**67371**	**41369**	**51000**

8.2.2 As seen in the Exhibit, a total of around Rs. 1600 Cr. of investment is estimated to be required for these new/ additional projects over the next twenty years to develop tourism infrastructure in the state. A large part of this investment is expected to be in accommodation facilities followed by connectivity infrastructure. Accommodation facilities need to be added in line with the traffic growth in the state and at particular destinations. In case of connectivity infrastructure, construction and repairs of link and approach roads would be needed to be taken on priority.

8.2.3 Similarly, other tourism infrastructure such as wayside facilities and tourist offices need to be provided on a priority basis at various locations. Tourist site enhancement and new tourism products should be phased out so as to optimise the destination life cycle.

CHAPTER 9 :

TOURISM PROJECTS: EMPLOYMENT OPPORTUNITIES AND ENVIRONMENTAL ISSUES

This chapter contains:

- Introduction
- Tourism and Employment
- Tourism and Environment: Issues in Rajasthan
- Eco-tourism in Rajasthan: Key Issues
- Tourism Destinations in Rajasthan-Degree of their Environmental Sensitivity
- Proposed Tourism Projects-Degree of Environmental Sensitivity

9.1 INTRODUCTION

9.1.1 As seen from the previous chapters, tourism industry in Rajasthan has increasingly assumed an important role in the overall socio-economic development of the state. There are various economic benefits as well as costs that are associated with increased tourism activity in Rajasthan.

9.1.2 The potential economic benefits from tourism development include:

- Increased resources for the protection and conservation of natural and cultural heritage resources;
- Increased income and improved standard of living from tourists expenditures;
- Increased induced income from tourism expenditures;
- New employment opportunities;

- New induced employment opportunities;
- Increased community visibility leading to other economic development opportunities;
- Increased tax-base;
- Improved infrastructure and facilities;
- Development of local handicrafts

9.1.3 The potential costs include:

- Seasonal employment
- Inflation and increased costs (land, housing, food and services)
- Pollution; increased traffic/ congestion
- Negative impact on cultural and natural heritage resources
- Others such as increased crime, leakage of revenue, etc.

9.1.4 Thus, tourism activity can affect the overall social and economic well being and development of the state. Hence, it is imperative to understand the various benefits and costs involved in tourism, to plan for sustainable tourism development in Rajasthan. The present chapter analyses two most important tourism cost-benefit areas for Rajasthan, namely, employment and environment.

9.2 TOURISM AND EMPLOYMENT

9.2.1 The economic benefit of tourism development projects have been measured in terms of employment generated directly in the tourism sector, as well as in the economy as a whole due to linkages of the tourism sector with the rest of the economy.

Total Employment Generation

9.2.2 The direct employment likely to be generated in the economy due to tourism activity is based on the following parameters:

Tourist Arrivals

9.2.3 As explained in the forecast sections in Chapter 6, the tourist arrivals at each of the nine circuits studied is expected to grow at a higher rate in the first and second phase (short to medium term) and plateau out in the latter years. These growth rates are based on various factors (outlined earlier) such as basic tourism potential of a region, current and required infrastructure levels and scope for development of new products in the future.

Average Length of Stay

9.2.4 To arrive at the total distinct tourist stay in the state, tourist arrivals in ‘main entry points and hubs’ and main standalone locations in the state are considered. These arrivals represent over 90% of the ‘distinct’ tourist arrivals in the state. It is crucial to identify ‘distinct’ tourists as multiple counting of a tourist is inevitable as he/ she travels across different locations within the state.

9.2.5 Thus, to arrive at the 'distinct' domestic tourist numbers, the arrivals at Jaipur, Jodhpur, Udaipur, Mount Abu, Ajmer, Nathdwara, Alwar-Sariska and Kota were considered. Similarly, for the 'distinct' foreign tourist numbers, arrivals at Jaipur, Jodhpur, Bikaner, Udaipur, Sariska, Ranthambhor and Kota were considered.

9.2.6 The average length of stay at the above identified 'hubs' and standalone locations were further taken to calculate the total 'distinct' tourist days in the state.

9.2.7 The average length of stay at each of these places is estimated to increase by 1-2 days in the future (due to the introduction and marketing of new tourism products or augmentation of the existing tourism products in each of these locations) and is factored in to calculate the total distinct tourist days in the future.

Average Tourist Spends

9.2.8 Similarly, average tourist spends in each of the locations considered were calculated. These have been based on the average tourist spends as per the estimates of DoT, Rajasthan and based on inputs from the tourist operators and tourist trade at each location.

Incremental Tourist Expenditure

9.2.9 Based on the above, the incremental tourist expenditure has been calculated as follows:

Incremental Tourist Expenditure	=	(Incremental Tourist Arrivals) **x** (Average Length of Stay in the state) **x** (Average Spend Per Day)

9.2.10 Incremental tourist expenditures were thus calculated for both domestic as well as foreign tourists.

Tourism Employment Potential

9.2.11 Direct tourism employment potential has been calculated by using the incremental tourist expenditures for domestic and foreign tourists and employment/ output ratio that has been established for the Indian tourism sector based on earlier studies conducted by the Ministry of Tourism, Government of India. The employment output ratio gives the employment generated (in terms of number of people employed) per million rupees of tourist expenditure.

Thus,

Direct Tourism Employment Potential	=	(Incremental Tourist Expenditure) **x** (Employment / Output Ratio)

Note: Employment/ Output Ratio: Domestic – 59.2726; Foreign - 71.1618

9.2.12 To calculate the overall employment generated in the economy through tourist expenditures, the employment multiplier is used. The employment multiplier provides the total employment (direct as well as indirect employment) generation as a result of the total output.

Thus,

Total Employment	=	Direct Employment **x** Employment Multiplier

Note: Employment Multiplier: Domestic – 2.29; Foreign – 2.435

9.2.13 The summary of above calculations for Rajasthan state is given in Exhibit 9.1. The detailed calculations for the same are provided in Appendix 9.

Exhibit 9.1

Employment Potential of Tourism in Rajasthan

Year	Incremental Tourist Expenditure (Rs. Mn)		Direct Incremental Employment	Total Incremental Employment
	Domestic	Foreign		
2002	103	53	9867	23143
2003	107	59	10540	24745
2004	111	65	11193	26299
2005	115	71	11913	28014
2006	128	90	14058	33126
2007	125	64	12001	28143
2008	131	69	12736	29880
2009	138	75	13530	31759
2010	144	82	14390	33795
2011	188	122	19831	46667
2012	147	99	15779	37159
2013	154	106	16659	39239
2014	161	113	17592	41447
2015	169	120	18583	43791
2016	177	128	19634	46280
2017	168	84	15914	37305
2018	175	88	16652	39038
2019	183	92	17426	40854
2020	191	96	18238	42759
2021	200	101	19089	44756
Cumulative Employment Potential			**305628**	**718200**

9.2.14 As seen in Exhibit 9.1, the tourist activity in the state is estimated to create an additional employment potential of over 7 Lakh in Rajasthan over the next 20 years, of which around 3 Lakh is estimated by way of direct employment potential and over 4 Lakh by way of indirect employment potential.

Employment Potential by Category Summary

9.2.15 The employment opportunities in the state are aligned with the pattern of tourism expenditure. A typical tourist spend can be categorised under the following heads:

- Accommodation
- Local Tour and Transport Services

- ❑ Food and Beverages
- ❑ Recreation, Cultural and Sporting Activities
- ❑ Shopping
- ❑ Others including Local Sightseeing, Guide Services, etc.

9.2.16 An estimate of tourist expenditure break-up on the above categories is given in Exhibit 9.2

Exhibit 9.2

Illustrative Break-up of Tourist Expenditures

	Domestic	Foreign
Accommodation	35%	31%
Tour and Transport Services	10%	19%
Food and Beverages	24%	19%
Recreation and Cultural Activities	1%	9%
Shopping	26%	16%
Others	4%	6%

9.2.17 As seen in the Exhibit, accommodation has the largest share in tourist (foreign as well as domestic) expenditures in the state. This is followed by expenditure on food and beverages, local transport and tour services, shopping, recreation and others (entry charges at monuments, guide charges, etc.) for the foreign tourist. The domestic tourist spend on on recreation and cultural activities is relatively lesser.

9.2.18 There are substantial opportunities available for greater local participation in the tourism sector. In the tourist accommodation industry, there is scope for the provision of mid-priced accommodation. Alongside major roads linking tourist locations, there are opportunities for the provision of wayside amenities including restaurants and cafes. There are opportunities for involvement of local entrepreneurs in secondary tourist activities such as boat hire; and, for the expansion of tourist shopping with associated income injections into rural and remote communities.

Employment Potential Opportunities: Overall and for Women and Artisans

9.2.19 Exhibit 9.3 gives the employment potential in various areas of tourist spends.

Exhibit 9.3

Employment Potential of Various Tourist Expenditure Areas

Category	Overall Employment Potential		Potential for Women Employment		Potential for Artisan Employment	
Accommodation						
Star/ Heritage Hotels	**High** 50-300/ unit	• Front Desk • Housekeeping • Food Service • Maintenance • Others (administration, travel desk, entertainment, health and beauty, etc.)	**High** 5-50/ unit	• Front Desk • Housekeeping • Administration • Food Service • Parlors and Salons	**Medium** 5-10/ unit	• Live performances • Souvenirs and Handicraft stores
Other Hotels	**High**	• Front Desk	**Medium**	• Front Desk	**Low**	• Souvenirs and

Category	Overall Employment Potential		Potential for Women Employment		Potential for Artisan Employment	
	15-60/ unit	• Housekeeping • Food Service • Maintenance	5-20/ unit	• Housekeeping	2-3/ unit	Handicraft stores
Paying Guest	**Low** 4-5/ unit	Basic services on offer	**High** 1-3/ unit	Can be managed by housewives	**Low**	
Dharamshalas and Dormitories	**Low** 5-10/ unit		**Low** 1-2/ unit		**Low**	
Tour and Travel Services						
Tour Operators	**High** 10-80/ unit	• Reception • Administration • Drivers	**High** 5-10/ unit	• Reception • Administration	**Low**	
Transport	**High**	• Drivers	**Low**		**Low**	
Food Service						
Restaurants	**High** 20-40/ unit	• Service • Kitchen • Helpers	**Low** 2-5/ unit	• Kitchen	**Low** 1-2/ unit	• Cultural shows (occasionally)
Wayside facility	**High** 10-20/ unit	• Service • Kitchen • Helpers	**Low**	• Kitchen	**Low**	
Recreation (Theatre, Cultural Complexes, Shilpgrams Health Resorts Health and Rejuvenation Safaris, etc.)	**High**	• Live performances • Artisans • Instructors • Safari Guides • Administration	**High**	• Live Performances • Instructors • Administration	**High**	• Live performances • Shilpgram artisans
Souvenir Shopping						
Direct: Retail	**Medium**	• Sales • Administration	**Medium**	• Sales • Administration	**Low**	
Indirect: Manufacturing	**High**	• Weavers • Craftsman • Sculptors, Potters • Smiths • Artisans	**High**	• Weavers • Craftsman • Sculptors, Potters • Smiths • Artisans	**High**	• Weavers • Craftsman • Sculptors, Potters • Smiths • Artisans
Others						
Guide Services	**Medium**		**Low**		**Low**	

Potential for Women Employment

9.2.20 Women comprise a low proportion of persons working in the organised sector of the state. A notable feature of the tourism sector is that it employs a large proportion of women, educated and uneducated, skilled and unskilled. Women are in greater numbers as compared to other industries in hotels, airline services, travel agencies, handicrafts manufacture, cultural activities, other tourism-related activities (Annual Report 1996-1997, Government of India). Tourism thus offers a large potential for the employment of women and socially disadvantaged groups in Rajasthan.

9.2.21 As seen in Exhibit, the project sectors identified in the perspective plan, which offer maximum potential for employment of women are accommodation, tour and travel services and recreation. Other project sectors such as shopping also generate large direct and indirect opportunities for employment of women.

Potential for Artisan Employment

9.2.22 The projects that offer maximum opportunity for creating employment for artisans are in the recreation and souvenir-shopping category. Recreation facilities like theatres, cultural complexes and Shilpgrams, etc. offer maximum opportunities for employing the local artisans.

Strategies for Increasing Employment through Tourism

9.2.23 To maximise opportunities for local participation, training programmes need to be made available to residents of the state, especially younger people. Training programmes can raise the skill base of the industry and thereby aid in the delivery of quality tourist experiences. In addition to direct recruitment the development of the tourism sector is likely to attract migrants looking for better economic opportunities. To the extent possible, these employment opportunities should be met through the local populace/ community and only specialist positions recruited from outside the state. The key objective should be to achieve high and appropriate tourism standards.

9.3 TOURISM AND ENVIRONMENT ISSUES IN RAJASTHAN

9.3.1 Tourism activity like any other industry has the potential to disturb the environment of the native place. This could be in the form of increased air, water and noise pollution, destruction of the social and cultural fabric of the native place, disturbance/ destruction of the natural biodiversity of the place, etc. Exhibit 9.4 gives an illustrative list of environmental issues that may arise due to increased tourism activity in Rajasthan.

Exhibit 9.4

Tourism and Environment Issues in Rajasthan

Environmental Issue	Connection to tourism	Environmental problems arising from / addressed by
Negative effects of increased tourism activity		
Changes of biological resources	Tourism activities such as hunting, fishing, camping and other sports may lead to depletion of ecosystems and species	• Loss of biological diversity • Soil contamination
Land use and environmental restructuring	Construction of roads, hotels, resorts, ropeways and other infrastructure	• Loss of biological diversity • Soil erosion
Waste discharge in water, air and land	Increase in the number of persons in tourism areas leads to increase in amount of waste	• Air pollution • Water pollution • Soil contamination
Water use for human activities	Increased consumption of sparse resources during tourism seasons	• Resource scarcity
Energy production and consumption	Tourism will lead to increased use of various means of transport	• Greenhouse effect • Destruction of ozone layer • Air pollution
Human health and environmental disasters	Emission of noise and gases from traffic will affect human health and increase destruction of buildings of cultural value	• Noise pollution • Air pollution
Positive effects of increased tourism activity		
Resource Management	Increased income from tourist may lead to better resource management	• Loss of biological diversity • Soil contamination and

Environmental Issue	Connection to tourism	Environmental problems arising from / addressed by
	Tourist interest in flora and fauna may lead to an increase in area of natural reserves	erosion
Pollution monitoring and control	Demand from tourists for good quality drinking water, etc. may lead to better monitoring	• Water pollution • Air pollution • Noise pollution
Effects of environment quality on tourism activity		
Ecosystems inventories	Ecosystems such as forests, deserts, wetlands, etc. will influence tourism demand	• Resource scarcity • Loss of biological diversity
Lithospheric and hydrological systems	Topography, soil type, amount of precipitation will influence tourism demand	• Soil erosion • Resource scarcity
Atmospheric system	Temperature and air pollution may influence tourism demand	• Air pollution

9.3.2 Although generic environment legislation is present in Rajasthan, there is currently no legislation that deals with the direct effects of tourism activity on the environment of the native place.

9.3.3 Presently, the important environment related legislation that affects tourism are the policies of the Central and the State Governments concerning forests and other protected areas. It is important to note here that these policies do not have any specific mention of tourism. In fact, there is a general tendency to discourage tourist activity in the forest and other protected areas to ensure preservation of the environment and ecological damage due to the influx of tourists.

Ecological Heritage of Rajasthan: Focus Areas for Environmental Control

9.3.4 Rajasthan has rich and diversified social, ethnic heritage and distinct flora and fauna. It also has remarkably glorious history and tradition of sacrifices for the conservation of its rich biodiversity. The sentiments and traditional value system of protecting wildlife has been duly respected by its people, especially the tribals in the state. The State Government has accorded environment highest priority even today and the ban imposed on hunting since 1977 is in force to preserve the wildlife in the state.

9.3.5 The forests of Rajasthan cover an area of 31,900 Sq. Km., which is 9.32% of the total geographical area of the state. They are spread unequally in northern, southern, eastern and south-eastern parts of the state. Some of the biodiversity rich areas of Rajasthan, namely Keoladeo National Park in Bharatpur and Sambhar Lake in Rajasthan, have been declared as world heritage sites.

9.3.6 Rajasthan has 4 National Parks and 25 Wildlife Sanctuaries identified by the State Forest Department. The total area of National Parks and Sanctuaries is 9161.21 Sq. Km., which is roughly 2.8% of the geographic area of the state or 30.2% of the forest areas in the state. Apart from the above, the Forest Department has also identified 32 closed areas in the state. These areas account for 4.3% of the total geographic area of the state.

9.3.7 The vast floral and faunal diversity of the state is evident from the fact that there are about 2500 species of plants, 450 species of birds, 50 species of mammals, 20 species of reptile and 14 species of amphibians besides numerous species of insects, butterflies, micro flora and fauna. A large number of big and small water bodies scattered all over the state including the recently created wetlands along Indira Gandhi Nahar have also enhanced the habitat diversity in the state.

9.3.8 Though Rajasthan as a whole is characterised by arid land and desert, there are unique areas of spectacular habitats. The Thar Desert of Rajasthan has great significance supporting unique species of desert flora and fauna. It has typical desert life forms such as Desert Cat, Desert Fox, Caracal, Indian Gazelle and Great Indian Bustard. The Semi-Arid Zone is a large transition area between the true desert and the seasonally wet peninsular India. The preponderance of grasses and edible shrubs in is a perfect habitat for Cheetal, Sambhar and Blue Bull.

9.3.9 There are several other species of great conservation significance, such as, Tiger, Leopard, Four Horned Antelope, Black Buck, Sloth bear, Jackal, Flying Squirrel among others. The Keoladeo National Park (KNP) at Bharatpur is amongst world’s unique habitat for birds, particularly a paradise for water birds. Similarly, Chambal river is another unique wetland naturing rich variety of aquatic fauna including fresh water Crocodile, Gavial, Gangetic Dolphin, Soft Shelled Turtle, Otters, a variety of endemic fish and other species.

State forest Policy

9.3.10 The state has taken up various strategies, plans and programmes within the overall framework of the National Forest Policy with special emphasis on combating desertification, checking soil erosion and denudation with massive people’s movement.

9.3.11 The present forest area of the State is only 9.32% of its total geographical area, which is far below the national average. Considering the existing extent of forest area and availability of non-forest wastelands, it is felt that an estimated 20% of the state's geographical area can be brought under forest or tree cover by adopting appropriate technologies and providing required level of investment.

9.3.12 The existing area under various Protected Area Network (PAN) is 2.8% of the state’s geographical area, which is close to that recommended by the Wildlife Institute of India for Rajasthan, which envisages 3.1% of geographical area of the state under PAN.

9.3.13 World heritage sites like Sambhar Lake, other wetlands, sacred groves, locally called Orans and other similar areas rich in biodiversity provide ideal habitats to a variety of flora and fauna. On a conservative estimate these areas constitute about 1.8% of the geographical area. Some of these areas have been already declared as Closed Areas for the purpose of imposing ban on shooting of wild animals. These areas could be conveniently brought under scientific management for the purpose of biodiversity conservation. Considering all these aspects, the Forest Department of Rajasthan State proposes to have 4.8% of geographical area of the state for biodiversity purposes.

9.3.14 Some of the salient points of the state forest policy relevant to tourism are as follows:

- ❑ Conservation of unique rich heritage, cultural and ethnic tradition of conservation of floral and faunal diversity and genepool reserves through a network of protected areas, such as National Parks, Sanctuaries, Biosphere Reserves and Closed Areas.

- Conservation of rare and endangered species of flora and fauna of the state by undertaking in-situ and ex-situ conservation measures and establishing linkages with the natural habitats of the species for their rehabilitation.
- Promoting eco-development around protected areas with the involvement of local people and NGOs.
- Extension and dissemination of research findings and proven technologies for adoption by the users, government, non-government and private individuals.
- Shifting the onus of management of forests from the traditional management practices to people oriented approaches by internalising intensive and extensive participatory strategies in the working system of the Forest Department.
- Education and awareness raising through interpretation aimed at public appreciation of the importance of wildlife to human society.
- Bringing forestry close to people by creating massive people's movement with the involvement of women to minimise pressure on the existing forests.

9.3.15 As seen, the State Forest Policy addresses issues of community involvement in Conservation and that of education and awareness generation. These are inline with the overall objective of developing eco-tourism products in the state. However, given the growing trend of eco-tourism worldwide, there is a strong need to outline a specific framework which would address the eco-tourism development issues within the overall objectives of the Forest policy.

9.4 ECO-TOURISM IN RAJASTHAN: KEY ISSUES

9.4.1 Eco-tourism is generally described as 'tourism associated with protected areas'. Eco-tourism, a form of nature based tourism, aims to be ecologically, socio-culturally, and economically sustainable while providing opportunities for understanding and appreciating the natural environment. The three elements of Eco-tourism in Rajasthan perspective could be identified as:

- Focus of attraction is natural environments (e.g. wetlands or deserts) or specific components thereof, such as a particular type of animal or plant.
- Emphasis is on learning as an outcome of the interaction between tourists and natural environment. Eco-tourism is therefore differentiated from a generic nature-based tourism that are more *leisure based* or those that are *adventure oriented*.
- Sustainability which ensures that the integrity of those places is not undermined whilst understanding and appreciating natural attractions.

9.4.2 Eco-tourist is a word coined for nature and wildlife tourists and aims at providing the tourist with nature tourism opportunities and also at generating economic returns to strengthen protected areas and augment economic benefits for the local people.

9.4.3 Rajasthan despite having only 9.32% of geographical area under forests offers varied opportunities of developing eco-tourism both in the protected areas and outside the protected areas. The development of Eco-tourism will not only enhance the tourists arrivals in the state but also earn sizeable foreign exchange together with employment generation largely in an around forest areas benefiting rural and tribal population of the state.

Eco-tourism in Rajasthan and its Sustainability

9.4.4 In a state like Rajasthan recognised for its mass tourism, sustainable nature based tourism has been practiced for several decades within national parks and wildlife sanctuaries. However, the application of 'eco-tourism' label can be an ideological niche that can differentiate it from other forms of mass tourism.

9.4.5 Eco-tourism could actually improve the sustainability of tourism. The conventional line of thinking is that, greater the tourist inflow at a place, the more likely that the environmental and socio-cultural carrying capacity will be exceeded. The carrying capacity is not fixed but can be increased to a certain extent through appropriate management strategies.

- Eco-tourism can be effectively promoted in the state by identifying areas, which are quite rich in flora and fauna and providing camping sites to the visiting tourists so that they can enjoy the nature in its full glory.
- Trekking routes can be developed and safaris organized to give a real feeling of wilderness to the visiting tourists.
- Signages can be placed at strategic points to provide useful information to the visitor.
- Effective publicity by way of providing folders, maps, literature to the tourists would certainly generate the desired interest in the tourists to visit these places. This will serve a twin purpose; while new tourist spots will emerge on the state map, the pressure of tourist traffic on select sanctuaries and national parks will be dispersed.

9.4.6 Experiments involving local community have been carried at several locations in Rajasthan. Broadly classified as 'Rural Tourism' these projects are aimed at promoting community involvement in developing tourism in the state. Bishnoi villages near Jodhpur are a good example eco-tourism, which involves community initiative.

9.4.7 A total of 20 Eco-tourism projects to be implemented in the next 5 years have been proposed by the Rajasthan Forest Department. The estimated spend on the projects is close to Rs. 574 Lakhs with almost 50% investment coming in the first two years. The details of the investment allocation and phasing is provided in Exhibit 9.5

Exhibit 9.5

Financial Allocation and Phasing for Eco-tourism Projects in Rajasthan

All figures in Rs. Lakhs

S No	Name of PA / Spot	Year I	Year II	Year III	Year IV	Year V	Total
1	Jaisamand W.L.S., Udaipur	20.00	20.00	10.00	10.00	10.00	70.00
2	Sajjangarh, WLS, Udaipur	10.00	10.00	10.00	10.00	10.00	50.00
3	Kumbhalgarh WLS, Udaipur	20.00	20.00	15.00	15.00	15.00	85.00
4	Raoli Todgarh WLS, Udaipur	15.00	15.00	15.00	10.00	10.00	65.00
5	Phulwari Ki Nal WLS, Udaipur	10.00	10.00	5.00	5.00	5.00	35.00
6	Mount Abu WLS, Sirohi	25.00	15.00	11.00	10.00	10.00	71.00
7	Desert National park, JSMR	10.00	5.00	5.00	5.00	4.50	29.50
8	Talchappar WLS, Churu	4.00	4.00	4.00	3.00	2.00	17.00
9	Darrah WLS, Kota	4.00	4.00	4.00	3.00	2.00	17.00
10	Ramgarh Vishdhari, Bundi	5.00	5.00	5.00	5.00	3.50	23.50

S No	Name of PA / Spot	Year I	Year II	Year III	Year IV	Year V	Total
11	Kankwari Fort, Sariska, Alwar	5.00	2.00	2.00	2.00	1.00	12.00
12	Kheechan, Phalodi	3.00	2.50	2.00	2.00	1.00	10.50
13	Myla Bagh, Jaipur	2.00	1.00	0.50	0.50	0.00	4.00
14	Tehla Fort, Alwar	5.00	3.00	3.00	2.00	1.00	14.00
15	Kushalgarh Fort, Sariska	5.00	2.00	2.00	0.50	0.50	10.00
16	Shergarh Fort, Baran	5.00	2.00	2.00	1.00	0.75	10.75
17	Shahbad, Baran	5.00	3.00	2.50	2.00	2.00	14.50
18	Khandar Fort, Sawai Madhopur	5.00	3.00	2.50	2.00	2.00	14.50
19	Sorsan, Kota	3.00	3.00	3.00	2.50	1.00	12.50
20	Udgir Fort	3.00	2.00	2.00	0.75	0.50	8.25
	Total	**164.00**	**131.50**	**105.50**	**91.25**	**81.75**	**574.00**

9.5 TOURISM DESTINATIONS IN RAJASTHAN–DEGREE OF THEIR ENVIRONMENTAL SENSITIVITY

9.5.1 The main tourism destinations and the degree of their environmental sensitivity are provided in the Exhibit 9.6

Exhibit 9.6

Environmental Sensitivity of Various Tourist Destinations in Rajasthan

Location	Eco Sensitivity	Key Issues/ Concerns
Jaipur	High	• Air pollution due to increased vehicular traffic • Scarcity of drinking water • Problem of effluent discharge and waste management • Depletion of natural areas due to construction activity
Ajmer	High	• Potential threat to Ana Sagar and Foy Sagar due to increased usage of lake water • Air pollution due to increased vehicular traffic • Problem of effluent discharge and waste management
Pushkar	High	• Pollution of the Pushkar Lake and surroundings • Improper sewage disposal during the Pushkar fair
Jaisalmer	High	• Problems of sewage disposal affecting the foundation of the structures of the fort and its precincts
Sariska NP	High	• Increased vehicular traffic will disturb the natural habitat of wildlife in the park • Destruction of vegetation due to increased tourist activity
Keolodeo NP	High	• Increased vehicular traffic will disturb the natural habitat of wildlife in the park
Ranthambhor TR	High	• Increased vehicular traffic will disturb the natural habitat of wildlife in the park • Destruction of vegetation due to increased tourist activity
Udaipur	High	• Increased commercial activity around the lakes due to conversion of residential places into hotel accommodation further leading to discharge of effluents in the lakes • Air pollution and congestion due to increased vehicular traffic
Mount Abu	High	• Air pollution due to increased vehicular traffic • High pressure on carrying capacity of the hill station
Desert National Park	Medium	• Disturbance/ destruction of the natural habitat of Desert National Park
Siliserh	Medium	• Contamination of lake water due to tourism sports and discharge of waste
Rajsamand	Medium	• Water pollution due pilgrims bathing and waste discharge from the nearby temple
Banswara & Dungarpur	Medium	• Threat to tribal habitat due to increase tourist arrival and associated commercial activity
Others locations	Low	

9.5.2 As seen from the Exhibit, tourist destinations that have high degree of environmental sensitivity are places of high tourist visitations. They face potential environmental threat due to pressure on civic amenities, especially the natural resources.

9.5.3 The main destinations of growing environmental concerns due to increased tourism activity are the National Parks and Wildlife Sanctuaries that fall on the eastern border of the state. The popularity of these National Parks is mainly due to the easy accessibility of these places. Sawai Madhopur (12 km from Ranthambhor) is an important junction on the Mumbai-Delhi rail line. The Keoladeo National Park lies on the extremely busy Agra-Jaipur highway (NH-11) which is a part of the famous Golden Triangle. The Jaipur-Alwar State highway passes through the Sariska Tiger Reserve.

9.5.4 Although the official tourist arrivals at the Desert National Park, Jaisalmer in 1999 were close to 1100, the actual figures would be multifold given visitors entering from the unfenced/ non-cordoned sides of the protected area. Presently there is no zonation within the park. A large number of tourists access the protected area from Sam and Sudhashri presenting a threat to the flora and fauna within the park. Thus, there is a need to demarcate the zones within the park as the Core zone, Buffer zone and Tourism zone to restrict/ manage the tourist activity.

9.6 PROPOSED TOURISM PROJECTS-DEGREE OF ENVIRONMENTAL SENSITIVITY

9.6.1 Very few directly polluting investments have been proposed in the perspective plan and there is no significant negative impact on the environment and ecology.

9.6.2 In fact, eco-tourism projects suggested in the perspective plan would be a significant step towards generating interest towards ecological issues. Improved sewerage and drainage facilities would contribute positively to the ecology and hygiene levels at the places of tourist interest. At a broad level, it would also enhance the overall tourist experience.

9.6.3 Improvement in the public amenities, monument landscaping site enhancement, cleaning of water bodies, and plantation of greenery will have a beneficial impact on the environmental of the cities.

9.6.4 Road construction and improvement projects suggested in the perspective plan would lead to decongestion on the existing roads, ultimately resulting into reduction in fuel consumption and reduction in air and noise pollution levels. However, road projects would require landfill / land reclamation in some cases. Thus, there is a threat of destroying water bodies / marshlands and the flora and fauna during such projects. Exhibit 9.7 provides a summary of degree of environmental sensitivity of the proposed tourism projects.

Exhibit 9.7

Environmental Sensitivity of Proposed Projects

Project	Degree of ecological sensitivity	Positive Impact	Negative Impact
Hotels & Resorts	Medium		• Increased consumption of sparse resources such as water • Effluent and solid waste management
Roads	Medium	• Decongestion of roads leading to reduction in fuel consumption	• Artificial landfill and reclamation of marshlands

Project	Degree of ecological sensitivity	Positive Impact	Negative Impact
			• Soil erosion
Airports	Medium		• Artificial landfill and reclamation of marshlands • Disturbance to flora and fauna
Ropeways	Medium	• Reduction of vehicular traffic leading to fall in air and noise pollution levels	• Disturbance to natural habitat of wildlife • Loss of bio-diversity
Water tourism	High		• Contamination of water bodies • Depletion of marine life
Site enhancement	Low	• Cleaning up of water bodies • Beautification leading to landscaping and tree plantation	
Golf courses	Medium		• Artificial landfill
Safaris	Low		

9.6.5 Hotels and resorts, ropeways, water tourism (water sports and canal safaris), desert sports, etc. are amongst the most eco-sensitive projects. Similarly construction / expansion of airports would lead to massive land reclamation and construction activity leading to air and noise pollution, in addition to affecting the flora and fauna due to clearing of the land required.

9.7 SUGGESTED ENVIRONMENTAL CONTROLS FOR TOURISM PROJECTS IN RAJASTHAN

9.7.1 Sustainability of tourism activity is highly dependent on how the activity can be woven into environmental and socio-cultural fabric of the native place at the same time adding to its economic development, whereby the local community derives maximum value from the same.

9.7.2 Given Rajasthan’s increasing popularity as a tourism destination with foreign as well as domestic tourists and the growing popularity of tourism concepts such as nature tourism, eco-tourism, rural tourism, it is necessary to outline specific environment controls framework to ensure sustainability of tourism.

9.7.3 With proper ecological environmental controls, the threat to ecological balance could be mitigated. Some of the controls would be as mentioned below:

Forest Areas

- Restricting development of facilities (roads, hotels, etc.) inside the protected areas. Allowing bare minimum civic amenities inside the protected area
- Restricting vehicles movement within the protected areas in a phasewise manner by:
  - Banning unescorted private vehicles from entering the protected areas
  - Replacing smaller vehicles (Jeep, Gypsy) with larger vehicles (Canter, Vans) to reduce the overall vehicles plying within the protected area
  - Eventually replacing all polluting vehicles with the non-polluting electric vehicles

- Wherever possible, creating walk-ways, pre-marked nature trails, etc. that would aide smooth tourist flow within the protected areas and ensure less tourist nuisance

<u>Tourism Projects/ Products</u>

- Hotels
  - Subsidy on installation of ETPs & solid waste management system
  - Subsidy on installation of renewable energy equipment (solar cell, biogas, etc.)
- Water tourism
  - Demarking only non-sensitive areas for water sports activities

<u>Urban Agglomerations</u>

- Development of region in a pre-planned manner so as to avoid concentrated tourist activity in a particular place thereby reducing the pressure on natural resources. For example, develop tourist infrastructure in vacant areas around the main cities to reduce demand on the city's civic infrastructure and resources.
- Devise a plan for effective collection, treatment and discharge of effluents from settlements within the walled cities in the state. For example, in Jaipur, Udaipur, Jaisalmer, etc.
- Conservation of old/ walled cities through restriction of polluting vehicles within the precincts and by architectural controls and/ or restriction on new construction activity within these old/ walled cities
- Soil conservation activities such as plantation, afforestation, etc. to be made mandatory for new tourism projects.

9.7.4 Besides these measures the State Government to boost sustainable eco-tourism though community based conservation should also encourage the following:

- Creation of participatory management institutions for every protected area
- Use of traditional knowledge in all respects of conservation
- Passing on various benefits of conservation to people
- Employment in wildlife programmes only to local people
- Access to information for local people

<u>Carrying Capacity Enhancement</u>

9.7.5 The over consumption of resources by tourists and tourism infrastructure is incompatible with sustainable development. The carrying capacity at several places like Ajmer, Mount Abu, Jaipur, Udaipur in Rajasthan has exceeded with the increase of tourist inflow. There is a risk of tourist demand for resources (land, water, energy) competing with the needs of local population thereby increasing social inequality and injustice.

9.7.6 Tourism in Rajasthan, which was mainly mass tourism in the past was 'producer driven'. The industry today is becoming increasingly consumer-driven. A well informed, responsible tourist is putting increasing pressure on the tourism industry to behave more responsibly. As a result, the industry is aligning itself to address issues of carrying capacity.

9.7.7 The issue of carrying capacity has often been addressed by developing alternate tourist locations, thereby redistributing the tourist activity. However, this is easier done with activity driven tourism. Given the nature of tourism in Rajasthan, which is more passive (sight seeing), it would be difficult to address the issue of carrying capacity purely by creating or promoting new locations. Existing locations such as Ajmer, Jaipur, Udaipur would continue to attract a large number of tourists arriving in the state due their importance.

9.7.8 Tourism industry in Rajasthan lacks information on the requirements of sustainable tourism and on how to integrate economic interests with environmental and social requirements. While the tourism industry in Rajasthan may be willing to improve their products and services, there would be an imminent conflict between the industry's pursuit of economic gains and social and environmental responsibility.

9.7.9 Consumer behaviour in tourism is both a product and the cause for change in policies by the government and industry. Therefore, a comprehensive approach is required to solve the problems associated with market-driven tourism. Some of the recommendations that would influence tourist consumer behaviour are as provided below:

- Presently the usage of mass media to promote tourism in Rajasthan is restricted to advertisements, painting images of destinations rather than providing relevant information for potential travellers. Mass media can be effectively used to influence travel decisions and consumer behaviour in the destinations.
- There is a lack of reliable and appropriate research data on the determinants of tourist demand, motivation and behaviour. Statistics should be maintained and, if required, periodic researches undertaken to assess emerging tourist trends and identify sustainable alternatives.
- The key to develop effective partnerships in tourism industry in Rajasthan is to remove the imbalance in power between the different stakeholders. The tour operator and guides wield a considerable influence on the tourist flow and activity in the state. As a result most tourist activity in the state is concentrated in a few pockets. Hotels established outside the main tourist hubs attract only foreign tourist groups. Tour operators should be educated on the importance of carrying capacity and the need to spread the tourist activity away from the congested places.

9.7.10 The most obvious of the instruments and remedial measures available are:

- Legal measures: Rules and regulations that monitor the growth of tourism infrastructure at a particular place or an area. This could be mainly in form of restriction on the construction of new hotels and other accommodation facilities.
- Market based instruments such as taxes to influence market prices of tourism products and services.
- Industry self-monitoring: A self imposed code of conduct across the tourism industry participants like hotels, tour operators, guides, taxi operators, etc.
- Good local transport facilities: To ensure tourist movement away from the hubs, it is essential that adequate and affordable local transportation facilities must be provided for the tourists.

Conclusion

9.7.11 Dovetailing tourism objectives with the overall environmental concerns requires planned co-operative efforts between the tourism industry, the local community and the Government on a sustained basis. Apart from a strong policy environment to protect and develop natural ecosystems, there is a strong need for local communities to participate in environment conservation. Similarly, the tourism industry has to appreciate the fact that tourism activity and its quality is highly dependent on the quality of environment that Rajasthan would offer to domestic and foreign tourists. Hence, eco-conservation and development has to be strongly integrated in all plans and activities for development of tourism in the state.

CHAPTER 10 :

FUNDING OF TOURISM PROJECTS, ROLE OF PRIVATE SECTOR AND RECENT PRIVATISATION INITIATIVES

This chapter contains on overview of the following:

- Ownership of tourism assets in Rajasthan
- Role of Private sector
- Initiatives and Incentives available to Private Sector
- Recent Efforts at Privatisation of RTDC properties and Learning
- Other non-government funding options

10.1 OWNERSHIP OF TOURISM ASSETS IN RAJASTHAN

10.1.1 Tourism assets in the state are classified as:

- Hospitality (Hotels, resorts, restaurants and wayside facilities)
- Travel infrastructure and facilities (buses, taxis, roads, airport, etc.)
- Information services (Tourist Reception Centre, Tourist Information Bureau)
- Tourism Sites (monuments, sanctuaries, etc.)
- Others (leisure facilities, cultural complexes, museums, shops, etc.)
- Tourism Support Services (Hotel Management and Food Craft Institutes)
- Properties of Historical and Cultural Significance (palaces, havelis, etc.)

10.1.2 The ownership of tourism assets under the above-mentioned categories is discussed in detail subsequently.

Hospitality

10.1.3 Most hotels, resorts and motels in the state are owned by private parties, some of them by national and international hotel chains. At present Rajasthan has close to 1450 hotels classified under different categories. Apart from the hotels, other accommodations such as paying guest and dormitories (dharamshalas / Yatri Niwas) are offered by individuals or public / private trusts.

10.1.4 Of the total room capacity in the state, approx. 4% is owned by the state government through its undertakings like RTDC and RSHCL. At present RTDC owns 36 hotels and 15 motels with a total capacity of 2102 beds. Besides these, RTDC also provides temporary ‘tented’ accommodation at various places during the fairs and festivals. Besides these, another state undertaking – Rajasthan State Hotel Corporation Ltd. (RSHCL) also manages two hotel properties and Indian Tourism Development Corporation (ITDC) manages 3 hotels in the state.

10.1.5 A large chunk of accommodation (approx. 96%) in the state, is thus, owned by the private sector in form of hotels and paying guest facilities. Of this close to 3% are owned and/or managed by national and international hotel chains. The rest are owned and managed by small local entrepreneurs.

10.1.6 The state has a large and fragmented base of restaurants and midways, which are also owned by local entrepreneurs. The RTDC also operates 7 cafeterias. Many of RTDC’s motels also double up as wayside facilities.

Travel Infrastructure and Facilities

10.1.7 Flight services are operational at only three places in Rajasthan i.e. Jaipur, Jodhpur and Udaipur. Flights to Jaisalmer have been currently discontinued. The airports at Jaipur and Udaipur are owned by the Airports Authority of India (AAI), whereas, the airports at Jodhpur and Jaisalmer is managed by the Indian Airforce. Presently, only three domestic airlines (Indian Airlines, Alliance Air and Jet Airways) and one international airline (Air India) operate on commercial basis in the state.

10.1.8 Railway assets are owned and managed by the Indian Railways. The prestigious Palace on Wheels (PoW) is jointly operated by RTDC and Indian Railways.

10.1.9 Road travel is the most preferred mode of travel within the state. Luxury coaches and taxi services for tourist travel within the state are owned by private entrepreneurs. Local population usually travels on buses operated by the state owned Rajasthan State Road Transport Corporation (RSRTC).

10.1.10 RTDC owns a fleet of 12 buses, 6 taxis and an imported car for providing daily sight seeing and guided tours at important tourist places like Jaipur, Jodhpur, Chittaurgarh, Jaisalmer, Sariska, Mount Abu and Udaipur

Information Services

10.1.11 Information dissemination and travel assistance services in the state are primarily provided by RTDC. RTDC runs 42 Tourist Reception Centres (TRCs) and Tourist Information Bureaus (TIBs) at 21 places in the state and 4 outside the state at New Delhi, Mumbai, Kolkata and Chennai.

10.1.12 Private information centers / kiosks are also operational, although only at the relatively larger hotels, providing information primarily on travel. These information centres are mostly managed by the local tour / taxi operators.

Sanctuaries and Monuments

10.1.13 The most critical tourism units in the state are sanctuaries and monuments. Rajasthan has 4 National Parks and 25 Wildlife Sanctuaries managed by the State Forest Department.

10.1.14 The forts, palaces, havelis, etc privately owned by the erstwhile princes and their descendents were transferred to or taken over by the Government after the abolition of privy purses and zamindari system. Some of these historical sites and monuments now fall under the jurisdiction of the Archaeological Survey of India (Central Agency) whereas some come under the aegis of Archaeology and Museum Department (State level Agency).

10.1.15 A few of the heritage and historical sites such as forts, palaces and havelis are, however, still owned by the descendents of the erstwhile rulers and often managed by private trusts established by them.

10.1.16 Some heritage properties have been converted into museums and tourist sites. For example, Mehrangarh Fort (Jodhpur), Patwon ki Haveli (Jaisalmer), Junagarh Fort (Bikaner), Poddar Haveli (Shekhawati) and others. A large number of palaces and havelis in the state have been converted into heritage hotels, many of which are managed by private parties.

10.1.17 The State Devasthan Department owns and manages several properties and land near the religious sites. However, the day to day working of the religious places is managed by the temple trusts.

Others

10.1.18 There are 21 museums managed by the State Government and 12 large museums managed by private bodies and trusts. Besides these, there are a large number of small private museums managed by small trusts and individuals across the state. Western Zone Cultural Centre of the Central Government also runs the Shilpgram near Udaipur, which is a cultural complex for the 4 states of Rajasthan, Gujarat, Maharashtra and Goa.

10.1.19 Apart from a few organised setups of handicraft and souvenir retail outlets in the state, the retail industry is dominated by a large number of privately-held small, unorganised outlets. Rajasthali (Government of Rajasthan undertaking), Cottage Industries Emporium (Private), Central Cottage Industries Emporium (Private) have are amongst the large retail setups with a network of outlets in the state.

10.1.20 The private sector has also created facilities for tourism products such as adventure tourism, nature tourism, leisure tourism, rural tourism, health tourism, etc. At some places, RTDC has also provided boating facilities.

Tourism Support Services (Hotel Management and Food Craft Institutes)

10.1.21 The requirement for trained personnel in the hospitality industry is met by a handful of institutes set up by the Government such as RITTMAN (regional chapter of IITTM in Jaipur) and other Hotel Management and Food Craft Institutes (at Udaipur, Jodhpur and Ajmer).

10.2 ROLE OF PRIVATE SECTOR

10.2.1 The development of tourism in Rajasthan in the future would be largely dependent upon partnership of government agencies (in core infrastructure) and private sector (in tourism assets and projects).

10.2.2 There is a need for the private sector to play a more contributory role in tourism development in the state. From owning and managing tourism-related direct infrastructure in the state, the private sector would now have to play active role in defining the overall direction of tourism in the state by:

i) Ownership of tourist attractions and creation of tourism products

ii) Promoting 'Brand Rajasthan'

iii) Consultative and participatory role in policy making

iv) Seeking community support for tourism

Ownership of Tourism Attractions and Creation of Tourism Products

10.2.3 A large number of tourist attractions in the state are owned by the state government departments like Archaeology & Museums (A & M), Devasthan Department, Revenue Department, Public Works Department (PWD), Forest Department, etc. As many as 300 such attractions which include cenotaphs, forts, palaces, wildlife parks, havelis, temples and pilgrim complexes are available for adoption. While ensuring the conservation and maintenance of the attractions, the private sector investors would derive the required publicity by undertaking socially responsible projects.

10.2.4 The nature of tourist activity in Rajasthan is changing from the traditional passive tourism (sightseeing and leisure) to more active in nature (safaris, adventure tourism, rural tourism, etc.). These entails creating tourism products that would be interactive in nature. The private sector investment would be critical in developing these tourism products.

Promoting 'Brand Rajasthan'

10.2.5 The private sector will have to play an active role in aggressively promoting 'Brand Rajasthan' whilst providing the basic infrastructure and services. The private sector in Rajasthan has so far not promoted Rajasthan aggressively to the world. It would have to participate in creating interest for Rajasthan through co-ordinated public relations activity. This would involve contributing through communications and service quality to the brand. 'Brand Rajasthan' would also reflect the quality of experience in Rajasthan and ensure that Rajasthan's uniqueness is showcased to the world.

10.2.6 The private sector would be DoT's partner in selling tourism. Towards achieving the overall objective of promoting 'Brand Rajasthan' DoT would develop strategies and tactical campaigns with the industry participants who deal directly with the tourists.

Consultative and Participatory Role in Policy making

10.2.7 The private sector industry participants would have an ongoing dialogue with the DoT and would play a critical role of advising the DoT on its policies and regulations concerning the industry.

Seeking Community Support for Tourism

10.2.8 The private sector (especially the local entrepreneurs) would have to undertake programmes to educate the community, NGO's and other local organisations on the role and the value of tourism and the contribution it makes to community life, employment and economy.

10.3 INITIATIVES AND INCENTIVES AVAILABLE TO PRIVATE SECTOR

10.3.1 DoT has already identified various areas in which private participation/ investment in tourism is actively sought. The list of areas where private investment is invited is provided in Exhibit 10.1

Exhibit 10.1

List of Areas Identified by DoT for Private Investment

Direct Tourism Products	Accommodation	Road Transport	Other Transport	Other support infrastructure
▪ Water Sports (yatching, canoeing, kayaking) ▪ Camp Tourism ▪ River cruises ▪ Palace on Waves (Houseboats) ▪ Canal Safaris in Indira Gandhi Canal Project ▪ Heritage Museum	▪ Hotels (budget, economy, resort, star) ▪ Heritage hotels ▪ Camp Sites ▪ Paying guest accommodation	Tourist toll roads at various locations such as: ▪ Chomu – Samode ▪ Khekara – Kumbhalgarh ▪ Pali – Narlai ▪ Udaipur – Jagat ▪ Banswara – Arthuna	▪ Special tourist trains ▪ Air taxi services ▪ Helicopter services	▪ Handicraft marts / Shilpgram ▪ Hotel Management and Food Craft Institutes at Udaipur, Jodhpur, Bikaner, Mt. Abu and Kota ▪ Foreign Language schools ▪ Ropeways ▪ Water supply and sewerage schemes ▪ Transport terminals

State Government Initiatives for Development of Tourism Industry

10.3.2 Recognising the role of the private sector in the development of the tourism industry, the State Government has announced several initiatives and incentives to encourage and facilitate private sector participation. Some of these are outlined below:

- ❑ **Acquisition of land for tourism development**: A Land Bank has been set up by DoT through its nodal agency, RTDC, to make available land belonging to various government departments (PWD, Forest and Revenue), local municipalities, corporations, UITs to the private investor for setting up tourism units.
- ❑ **Identification of Nazool Properties for establishment of tourism units**: These are properties which are not protected by State Department of Archaeology and Museums (A&M) or Archaeological Survey of India (ASI) and which are owned by the State Government. Such properties would be transferred to DoT for

developing into heritage hotels / museums / tourist complexes / tourist resorts in collaboration with private entrepreneurs under Disposal of Land and Properties by DoT/RTDC Rules, 1997.

- **Simplification of rules and regulations for allotment and conversion of land for tourism infrastructure**: DoT, in consultation with the revenue and local self government departments is in the process of amending the relevant rules for conversion and allotment of land for setting up of tourism units in rural and urban areas.
- **Identification of Special tourist areas for preservation of special characters of these areas**: DoT is initiating special efforts to preserve the unique identity of tourist destinations that have assumed heritage importance like Jaisalmer, Pushkar, Nathdwara, Mount Abu, etc. Accordingly, local authorities have been asked to pass special laws to ensure preservation of special character of these tourist towns.
- **Preservation of historical and cultural heritage**: DoT is encouraging private initiative in preservation or monuments (forts, palaces, etc.) by offering these monuments for adoption. Efforts are being made to co-ordinate preservation, conservation and upkeep of the old buildings with all departments including ASI, A & M, Devasthan, Waqf Board, UIT's, municipalities, corporations, etc.

<u>State Government Incentives to Tourism Units</u>

10.3.3 To supplement its initiatives, the State Government has also extended various incentives for tourism industry in Rajasthan. Some of the important ones are mentioned below:

- Remission in stamp duty to the extent of 50% on transfer of deeds relating to land purchased in Municipal areas and to the extent of 100% relating to land purchased in Panchayat area
- Remission in Land and Building tax to the extent of 100% for hotels for the first five years if the hotel falls in a Municipal area
- Remission in Luxury tax to the extent of 50% for five years in Municipal areas and to the extent of 100% for five years in Panchayat areas
- Concession in Bar License fees for heritage hotels
- Increase in Luxury Tax slabs from Rs. 750 to Rs. 1000 and 50% rebate in Luxury Tax during off-season (April- July)
- Interest subsidy of 2% for tourism units on capital investment of Rs. 60 Lakhs and above with a condition that at least 50% of the unskilled workforce will be employed from local people
- DG sets subsidy at 25% of purchased value subject to maximum of Rs. 2.5 Lakhs for tourism units established in rural areas
- Entertainment tax exemption for films to the extent of 100% for a period of one year from the date of release if 75% of the film is picturised in Rajasthan
- Entertainment tax exemption to the extent 75% in first year, 50% in second year and 25% in third year for new Multiplexes and Drive-in Cinemas
- Allotment of Government land upto four bigas in rural areas at 25% of the reserved price of agricultural land subject to the condition that 100% unskilled workforce is employed from the local area

Central Government Loans and Schemes

10.3.4 Apart from the above state incentives, tourism units in the state can also avail of various incentives and concessions offered by the Central Government from time to time. Some of the major incentives being currently offered by the Central Government are as follows:

- Loan facility- the Tourism Finance Corporation of India (TFCI) provides financial assistance to the private sector for construction of hotels as well as other tourist facilities with an investment of Rs. 3 Cr. and above
- Interest subsidy- A 3% interest subsidy is available to hotels of one to three star categories on loans sanctioned by financial institutions. 5% interest subsidy is available on loans if tourism units are constructed in Jaisalmer, Jodhpur and Barmer
- Income Tax Incentives- (a) 50% of profit derived by hotels, travel agents and tour operators in foreign exchange are exempt from income tax. The balance 50% of profits in foreign exchange is also exempt provided it is reinvested within a period of five years in new hotel projects or expansion of existing units.
- Income Tax Incentive- (b) Hotels located in hilly areas, rural areas, places of pilgrimage or places notified as important for tourism development will be eligible for 50% deductions from their profits/ gains. In respect of hotels located in other places the deduction allowed is 30% except Mumbai, Delhi, Chennai and Kolkata

Tourism Finance Corporation of India Ltd. (TFCI)

10.3.5 TFCI is a specialised development financing institution, catering to the needs of the tourism industry. TFCI has been promoted by IFCI alongwith financial institutions and leading banks and has provided assistance in form of rupee loans, underwriting / direct subscription to shares / debentures, equipment leasing and foreign loan guarantee for tourism-related activities, facilities and services.

10.3.6 Apart from core tourism projects like accommodation and hospitality segments, TFCI has also sanctioned assistance to projects like restaurants, wayside facilities, travel agencies, amusement parks, multiplexes, ropeways, car rental services, boating facilities, airports and tourism training institutes. However, major portions of TFCI's sanctions (over 90%) have gone in the hotel segment.

Private Sector Response to the DoT Initiatives

10.3.7 The state government's initiative for inviting private investment has evoked mixed response. Several interested private parties have submitted proposals to the DoT in the area of accommodation and leisure facilities.

10.3.8 The most important area where the DoT is actively soliciting private investment is in the creation of new tourism products. Some private and public trusts have responded by undertaking restoration and site beautification projects. One such initiative has been development of Kanak Vrindavan (Jaipur) by the Birla Trust.

10.3.9 Following reasons are cited for the mixed success of the DoT's initiatives:

- **Cautious approach of private investors** due to uncertain nature of tourism in the country in general and Rajasthan in particular. The past decade, especially the later half of the decade, has witnessed fluctuating tourist arrivals, low overall growth, and rapidly emerging competition from other destinations. This has rendered several proposed tourism projects non-viable under the present circumstances.
- **Fragmented industry structure** with large number of medium and small enterprises having limited capacity to invest.
- **Low investor confidence** in the current tourism scenario in general.

10.4 RECENT EFFORTS AT PRIVATISATION OF RTDC PROPERTIES AND LEARNINGS

10.4.1 After tourism was accorded an industry status by the Government of Rajasthan in 1989, a private sector led tourism development was envisaged. Inline with this vision, the State Government has embarked on the path of privatisation of its current tourism assets.

10.4.2 The main area in which privatisation has been successful is in accommodation, wherein the Department of Tourism has leased out 17 RTDC units (Hotels and Midways) to private parties on a short term two-year lease. Similarly, 21 more units are proposed to be leased out in the near future. Depending on the willingness of the private initiative to take up these properties and develop them further, the other properties will be similarly leased out.

Learning from Recent Privatisation Efforts and Suggested Way Forward

10.4.3 Discussions with Government officials and private parties (individuals and corporates) on the privatisation focus of the Rajasthan Tourism Department revealed some of the practical problems and concerns encountered in the process.

Privatisation so far is perceived to be limited to unprofitable ventures

10.4.4 So far, the focus of privatisation is perceived to be limited to unprofitable ventures instead of offering a whole range of investment avenues for the interested parties. There is now a felt need that the profitable ventures in which private parties had evinced interest should be opened up for investment on a long term (10 years and above) basis so that the private investor is encouraged to invest in upgradation of these facilities.

Need for a clear roadmap for privatisation

10.4.5 There is a need for thorough planning in the entire process of privatisation. For example, in the case of Rajasthan the interested parties were not clear on various issues related to areas of investment, transfer of properties, time frames for investment, eligibility norms, etc. What the private sector desires is clearly identified privatisation projects that are bankable in nature and are available on a long-term basis, so that investment in these properties can take place.

Inadequate awareness about the Government's privatisation schemes

10.4.6 Past experience suggests that many interested parties were unaware of various assets available for investment. This was primarily due to marketing of related schemes to selective audience (NRIs, foreign conservationists, etc.). An active effort to conduct 'road shows' for marketing these privatisation projects across India is necessary as this will increase the canvas of the investor profile.

No incentive to invest in currently non-profitable ventures

10.4.7 It is felt that some form of direct Government support is required especially in the privatisation of currently non-profitable ventures to a level wherein the private investor finds it attractive to come in. This has reduced the private sector confidence in such properties/ projects although inherently they have development potential with such Government support.

10.5 OTHER NON-GOVERNMENT FUNDING OPTIONS

10.5.1 Private sector investment, ably supported by Government investment in core infrastructure would be the two key sources for funding of tourism projects in the state. Apart from these, following sources for funding should also be looked at for tourism projects:

- Domestic Financial Institutions
- Foreign Direct Investment
- Foreign funding from bilateral and multilateral agencies
- Others (NGOs, trusts, community participation, Venture capital, etc.)

Domestic Financial Institutions

10.5.2 With Tourism being awarded an industry status by state governments, several financial institutions like IDFC, ICICI, IDBI, IFCI, etc. have expressed their willingness to fund tourism development projects, prominent amongst them being IDFC.

IDFC

10.5.3 IDFC, a financial institution with a mandate to invest in infrastructure projects in the country has broadened its initial focus on power, roads, ports and telecommunications to a framework of energy, telecommunications & information technology, integrated transportation, urban infrastructure and food & agri-business infrastructure. IDFC works as a lead arranger and also undertakes key advisory assignments with the infrastructure development agencies. It has approved financial assistance to 87 projects aggregating over Rs. 10,403 Crore so far.

10.5.4 IDFC has recently entered into a Memorandum of Understanding (MOU) with the Government of Uttaranchal to explore enabling initiatives in infrastructure development to harness the potential in hydro-power, tourism and other areas in Uttaranchal. The programmed involves an institutional alternative whereby the Government can access expert advice on policy frameworks and strategies on private finance initiatives to identify, structure and develop viable infrastructure projects with private sector participation. Such an approach is expected to enhance investments, both public and private, to expedite orderly development of power, tourism and other infrastructure sectors in the State.

10.5.5 IDFC has now nearly completed a power sector strategy for the State, undertaken and completed an AgroVision Report and is midway through two tourism projects and is now working on the revival of three airstrips and an urban vision for the state.

10.5.6 IDFC has also recognised the importance of environment risk management for infrastructure project financing. To support projects in addressing environmental risks, IDFC has established a separate Environmental Management Group (EMG) to administer its environmental management initiatives.

10.5.7 In addition to helping projects address environmental risks, through a value added approach, IDFC is also working on various initiatives to address the environmental and social issues of development at a policy level. IDFC is striving for an integrated approach to development that suitably identifies and addresses the risks to all stakeholders by:

- Providing technical inputs for environmental studies and management plans to address risks that may impair the project viability
- Providing inputs on issues associated with land acquisition and income restoration in areas where public sensitivities exist
- Helping develop terms of reference for studies to meet requirements of foreign lenders. In a specific instance, IDFCs intervention enabled the scope of the study to be reduced by over 50%, saving the project both money and time
- Assisting projects in identifying suitable professional consulting organizations to address specific requirements
- Providing inputs on regulatory requirements to enable projects to better understand and address the risks involved

Foreign Direct Investment

10.5.8 Foreign private investment for tourism projects is a relatively unexplored option in the Indian context. Foreign private investment in tourism has been so far limited to setting up of hotels by international hotel and fast-food restaurant chains through their Indian franchises. Other areas where foreign private investment has gone in the past are in support infrastructure like Airport projects, Power generation, etc.

10.5.9 An important recent development in this regard has been the raising of Foreign Direct Investment (FDI) limit to 100% for the Hotel and Tourism industry through the automatic route from the existing 51%. This would make investment in the hotel sector (especially the luxury and mid-priced range) more attractive for foreign players.

10.5.10 The main reason behind unavailability of foreign investment in other tourism infrastructure has been the relative small size of tourism market in India and lack of adequate financial incentives for the foreign investor to invest in tourism projects.

10.5.11 In the future, the focus areas where foreign investment should be sought in Rajasthan are for large projects like hotels, amusement and theme parks, resorts (including upmarket spa/ health resorts), golf clubs and air services. However, the simple most important sector for attracting foreign investment would still be the Hotel and Upmarket Resort sector.

Foreign Multilateral/ Bilateral Funding

10.5.12 International agencies can also provide assistance for tourism projects in form of bilateral aid (specific aid from the donor/ funding nation to the recipient agency) or multilateral aid (funding to recipient agency from international or multilateral agencies in the

World Bank, OECF, ADB, etc). This assistance could be in form of grant packages from donor agencies.

10.5.13 Agencies like the European Economic Community (EEC), UK Department for International Development (DFID), Canadian International Development Agency (CIDA) and United States Agency for International Development (USAID) are engaged in assisting tourism projects in the developing countries.

10.5.14 It is seen that usually tourism does not get a high priority in the total funding package by multilateral agencies. Since the focus of such lending is for core infrastructure and urban development projects (as in the case of Rajasthan for the ADB projects). Hence, it is critical that a Area Development Project is conceived in an integrated fashion as part of an overall Integrated Area Development Project for the area rather than a standalone basis. For restoration/ monument upgradation projects, support can also be sought from more project-focussed donor agencies (for example, the World Monuments Fund).

10.5.15 Other international sources of funding for tourism related investments that need to be explored are donor agencies like World Tourism Organisation (WTO) or the United Nations Development Programme (UNDP).

IFC

10.5.16 IFC, part of the World Bank Group, fosters economic growth in the developing world by financing private sector investments, mobilizing capital in the international financial markets, and providing technical assistance and advice to governments and businesses.

10.5.17 IFC has a wealth of experience in tourism. Since 1967 it has approved over US$1.3 billion of investments in more than 140 projects in 65 countries. At present it has over US$400 million of its own money invested in the global tourism industry.

10.5.18 IFC's Project Development Facilities (PDF) helps tourism project sponsors in the following areas:

- ❑ Obtaining equity and loan financing on appropriate terms, through project preparation advisory services;
- ❑ Formulating, evaluating and promoting project ideas and providing consultancy services to develop and implement business plans;
- ❑ Obtaining the technical assistance required for project implementation and start-up;
- ❑ Identifying and hiring appropriate technical and managerial personnel;
- ❑ Advising on acquiring local companies from foreign shareholders and acquiring state enterprises; and
- ❑ Developing marketing programmes for their projects;

10.5.19 IFC has assisted a wide range of sub-sectors of the industry with an emphasis on product development and tourism infrastructure – resort developers and accommodation providers, airlines, ground transport suppliers and owners of visitor attractions. IFC funds new products as well as those involving upgrading, expansion, redevelopment and repositioning elements.

Asian Development Bank (ADB)

10.5.20 ADB provides funding for tourism projects in areas of ecotourism, tourism service centers, access roads, airport upgrading and staff training.

Department of International Development (DFID)

10.5.21 DFID is the UK Government department working to promote sustainable development and eliminate poverty. In India, DFID has a large aid programme focussing on poverty alleviation through support for social sector initiatives.

Canadian International Development Agency (CIDA)

10.5.22 The CIDA Industrial Co-operation Programme provides financial support and advice to Canadian business planning sustainable business activities in developing countries in a variety of sectors. It reduces the risks to Canadian firms by sharing the costs unique to doing business in developing countries and those associated with providing training, the participation of women, and a clean environment. Financial support is provided through one of CIDA's three mechanisms:

- Investment
- Professional services
- Private participation in infrastructure

Others

10.5.23 Private and public trusts have also been instrumental in funding specific projects (usually at pilgrim centres, rural tourism, adoption of memorials) in Rajasthan. NGOs and community participation, also a possible source of funding has not been explored so far.

National Cultural Fund (NCF)

10.5.24 NCF was established as a trust in order to facilitate the infusion of Public and Private Sector funds in field of heritage conservation. This fund is managed and administered by the Council and an Executive Committee, draws representatives from various fields including Corporate Sector, Private Foundations and Non-profit organisations and is chaired by the Minister of Tourism and Culture.

10.5.25 For each project an MoU is entered into with the participating organisation and a Project implementation Committee setup with experts and representatives of the donor institutions to monitor and implement the projects. A Project Advisory Committee consisting of the nominees of the donors, NCF, representatives of the civic authorities and other interested groups oversee the project.

10.5.26 The NCF has, in the past, worked in close co-ordination with other trusts like the Indian Oil Foundation and Aga Khan Trust in field of protection, preservation and promotion of national heritage.

Aga Khan Trust for Culture (AKTC)

10.5.27 The Aga Khan Trust for Culture (AKTC), one of the agencies of the Aga Khan Development Network, implements cultural initiatives aimed at revitalising the heritage of Islamic communities and contributing to their social and economic development. Its programmes include the Aga Khan Award for Architecture, the Historic Cities Support Programme, and the Aga Khan Program for Islamic Architecture at Harvard University and Massachusetts Institute of Technology, ArchNet, the Music Initiative in Central Asia and the Humanities Project in Central Asia.

10.5.28 The Historic Cities Support Programme (HCSP) undertakes the conservation and rehabilitation of historic buildings and urban spaces in ways that act as catalysts for social, economic and cultural development. HCSP projects benefit from contributions provided by a variety of funding agencies including the World Bank, the Getty Grant Programme, the World Monuments Fund, the Ford Foundation, and the Swiss, Swedish and Norwegian bilateral aid organisation.

10.5.29 The Aga Khan Fund for Economic Development (AKFED) is an international development agency, which promotes entrepreneurship in the private sector in specific regions of the developing world. The mandate of Tourism Promotion Services is to realise tourism's potential in selected areas of the developing world, in an environmentally sensitive manner. TPS promotes tourism by building and managing hotels and lodges that contribute to economic growth in an environmentally sensitive manner.

World Monuments Fund (WMF)

10.5.30 WMF brings together public and private resources to carry out a comprehensive conservation programme of fieldwork, advocacy, funding and education and training. The agency has played an important role in the rescue and preservation of imperiled work of art and architecture. It works with its affiliates in France, Italy, Portugal, Spain and UK. The American Express Company is the founding sponsor of the World Monument Fund.

10.5.31 Governments from around the world, as well as local and community based preservation groups and professionals, nominate sites for inclusion on the World Monuments Watch List. A panel of international experts convened by WMF reviews the nominate sites and selects 100 of them for inclusion on the list, featuring the places most urgently in need of support and for which viable conservation plan exists.

Venture Capital Finance

10.5.32 Since tourism projects have a long gestation period, it has been seen that banks are reluctant to take risks. With this in the background, the state government should put up equity and quasi-equity and help investors in getting term loans. It is recommended that a Venture Capital Fund (VCF) be set up for state tourism projects.

10.5.33 The state can contribute a small amount to the equity base and raise the rest from financial institutions (FIs) like TFCI and IDFC. The fund will be professionally managed with people from FIs invited to participate and free of government interference. Initially, the equity will be invested in 10-15 prestigious private sector projects in a few key areas like amusement parks, water sports, etc. which have a high gestation period. Depending on the success of the fund, more areas can be opened up later for funding.

NGO assistance for Eco-tourism projects

10.5.34 Major international NGO's have also assisted with financial and technical assistance to support nature and tourism initiatives in developing countries. Some of the prominent amongst the NGO's are World Wildlife Fund (WWF), the World Conservation Union, the IUCN and the Nature Conservancy.

10.5.35 Exhibit 10.2 summarises the funding options available for various tourism projects in Rajasthan.

Exhibit 10.2

Funding Options Available for Tourism Projects in Rajasthan

Sr. No.	Type of Project	Likely Investing / Funding Parties						
		Government agencies	Domestic Private sector	Foreign Funding	Foreign (bilateral)	Foreign (Special donor agencies)	NGO	Community / Associations/ Cooperative
1	Infrastructure development at pilgrim places	4	4				4	4
2	Hotels		4	4				
3	Paying Guest Facilities		4					
4	Resorts (health, spas, water, jungle)		4	4				
5	Convention centres		4	4				
6	Restaurants and food services		4	4				
7	Amusement /Theme/ Water parks		4	4				
8	Ropeways		4	4	4			
9	Palace on Waves / River cruise	4	4					4
10	Havelis on Wheels		4					4
11	Air services	4	4	4	4			
12	Special tourist trains (Heritage trains)	4	4			4		4
13	Safaris (Camel / Elephant / Horse)		4				4	4
14	Tented camps		4					4
15	Conservation of Monuments	4	4	4	4	4	4	4
16	Museum Development	4	4	4	4	4	4	4
17	Golf Courses		4	4				
18	Rural tourism		4		4		4	4
19	Eco tourism	4	4	4	4	4	4	4
20	Adventure tourism		4	4	4		4	4
21	Handicraft marts		4				4	4
22	Cultural complexes / Shilpgram		4	4			4	4
23	Hotel Management and Food Craft Institutes		4					
24	Water supply and sewage schemes	4	4		4			4
25	Transport terminals	4	4					

10.5.36 At every stage, there would be need for the State Government (DoT) to stimulate private investment by creating a favourable atmosphere for investment with specific tourism-related fiscal, financial and other incentives. The State Government already has a number of incentive schemes for investment in different types of tourism related projects, as indicated earlier and these incentives appear adequate in the current context. Additionally, depending upon the importance of the project, the DoT could also extent special concessions to the investors on a case-to-case basis depending on the state and socio-economical impact of the project.

CHAPTER 11 :

INSTITUTIONAL FRAMEWORK FOR TOURISM DEVELOPMENT

This chapter contains

- Existing Institutional Framework
- Institutional Framework: Recent Initiatives

11.1 EXISTING INSTITUTIONAL FRAMEWORK

11.1.1 The State Government through its various departments and with assistance from the Central Government agencies is engaged in the task of creating tourism assets, managing them and promoting tourism in Rajasthan. The existing institutional framework for tourism development and promotion in Rajasthan is provided in Exhibit 11.1

11.1.2 As seen in the Exhibit, there are agencies at three levels engaged in activities related to tourism development and promotion. These three levels and the agencies therein are detailed below:

Primary Agencies (State Level)

11.1.3 Primary agencies involved directly in development and promotion of tourism are Department of Tourism, Art and Culture (DoT), Rajasthan, RTDC and RSHCL (DoT undertakings) and RITTMAN (Autonomous body)

Department of Tourism (DoT)

11.1.4 DoT, established in 1956, functions as an independent department within the Rajasthan State Government. Its functions include:

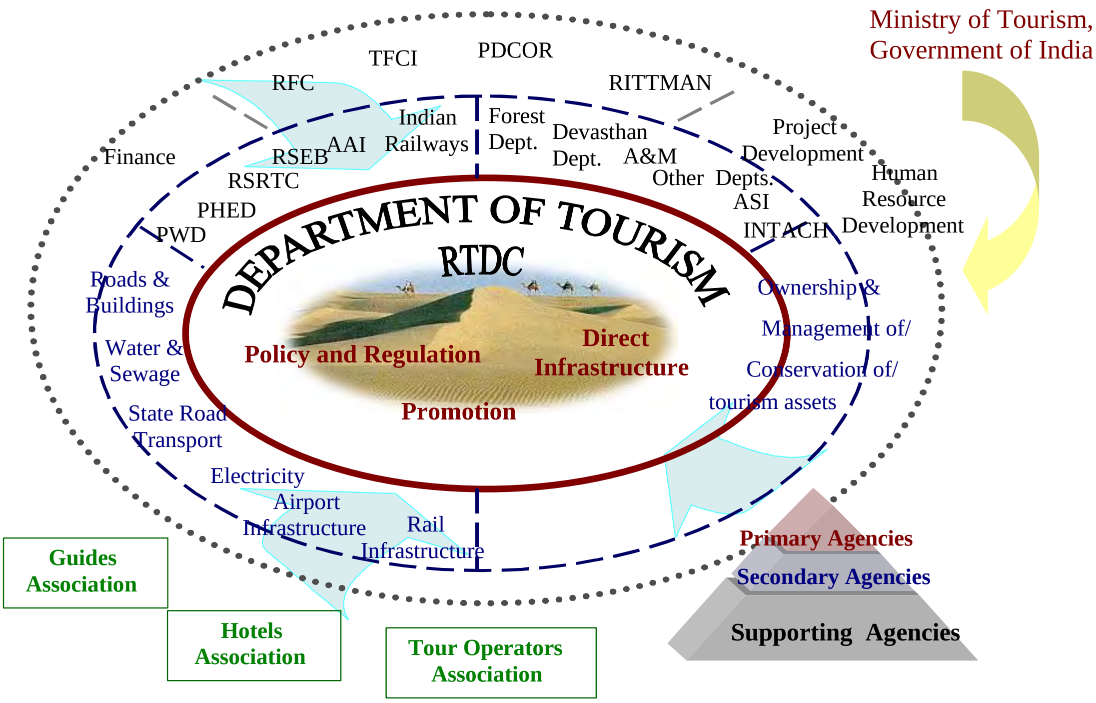
- Formulation and implementation of state policies and programmes related to tourism development and promotion
- Implementation of national policies and programmes related to tourism
- Co-ordination between various departments of the State Government and the private sector

11.1.5 DoT through its two state public sector undertakings, namely, RTDC and RSHCL provides accommodation and midway/ wayside facilities at various places across the state. DoT also runs the Tourist Reception Centres (TRCs)/ Tourist Information Bureaus (TIBs) at important tourist locations in the state. RTDC also organises various local, regional and state level conducted tours for visitors.

11.1.6 Besides these, DoT also carries out/ supports various promotional activities such as organisation of Rajasthan promotion seminars in different states and countries, organisation of fairs and festivals, art competitions and exhibitions, etc.

Exhibit 11.1

Institutional Framework for Tourism in Rajasthan



Other Agencies / Institutions

11.1.7 These include the agencies that provide infrastructure/ support for tourism in the state, etc. as shown in the Exhibit 11.2.

Exhibit 11.2

Other Agencies/ Institutions' Support for Rajasthan Tourism

Agency/ Institution	Role
State Level Institutions	
Public Works Department (PWD)	▪ Civil works falling under roads, bridges and public buildings and also

Agency/ Institution	Role
	work falling under activities like improvement of water bodies ▪ Responsible for maintenance of roads and government buildings ▪ Construction and maintenance of Helipads in the state
Rajasthan State Road Transport Corporation (RSRTC)	▪ Provides travel network (buses and bus stations) across the state
Public Health and Engg. Department (PHED)	▪ Responsible for supply of water and management of sewage systems
Local Municipal Councils/ Municipalities and local agencies (eg., JDA for Jaipur, etc.)	▪ Solid waste management, laying of roads and footpaths, street lighting, law and order, etc.
Urban Improvement Trust (UIT)	▪ Construction and maintenance of Traffic circles, street lighting, slum development, laying of roads and pavements, public utilities, etc.
Rajasthan State Electricity Board (RSEB)	▪ Responsible for electricity generation and distribution
Department of Forest and Wildlife	▪ Ownership and conservation of protected areas and wildlife in the state
Archaeology and Museums	▪ Ownership and conservation of archaeological wealth of the state
Devasthan Department	▪ Ownership and management of land and property at religious places
Rajasthan Urban Infrastructure Development Project (RUIDP)	▪ Implementation of urban infrastructure projects in Jaipur, Udaipur, Jodhpur, Ajmer, Bikaner and Kota
Central level/ National Institutions	
Indian Railways	▪ Railway lines, stations and services
Airports Authority of India	▪ Providing for Airport infrastructure and Airstrips
Archaeological Survey of India	▪ Ownership and conservation of certain archaeological sites in the state
INTACH	▪ Restoration and conservation of archaeological sites

11.1.8 Other agencies that are involved (indirectly) in the execution of tourism-related projects in the state include Rajasthan Small Industries Corporation (RAJSICO), Avas Vikas Sansthan (AVS), District Rural Development Agency (DRDA), District Collectorates (DC) and local self government bodies like Municipal Corporations, Municipal Councils, Gram Panchayats, etc.

11.1.9 Given the nature of tourism projects, the DoT liaises with other agencies/ departments on a regular basis for planning and implementing projects related to tourism development and promotion.

11.1.10 Apart from the state departments, the Centre also provides financial assistance for tourism projects in the state, under the Centrally Sponsored Schemes (CSS) for tourism projects. Execution agencies for projects sanctioned under the CSS are usually RTDC and the Rajasthan A&M department.

Support Agencies of Direct Relevance to Tourism Sector

Tourism Finance Corporation of India (TFCI)

11.1.11 The main objective of TFCI, a Centre level specialized financial institution, is to accelerate the growth of the tourism industry in India by providing financial assistance for tourism activities.

11.1.12 TFCI plays a developmental role within the overall policies of Government. It provides Rupee Loan, Equipment Finance/Leasing, Deferred Payment Guarantee, Underwriting of Public Issue, Merchant Banking and Advisory services to enterprises for setting up and/or development of tourism related activities, facilities and services including hotels, holiday resorts, amusement parks, safari parks, ropeways, cultural/conventional centres, air-taxi operations, car rentals, etc.

11.1.13 At present, TFCI has its head office in New Delhi, but efforts are on to persuade TFCI to open up a branch in Jaipur.

PDCOR

11.1.14 Project Development Corporation Limited (PDCOR), a joint sector company between HDFC, IL&FS and Government of Rajasthan, has been set up with the prime objective of implementing infrastructure projects in the state on a commercial format.

11.1.15 PDCOR takes up project development work including identification of prima facie commercially viable projects, preparation of detailed feasibility and investment banking reports, obtaining required government approvals and identification of private parties which can own and execute these projects. Currently PDCOR is managing the Jal Mahal Tourism Infrastructure Project in the area of tourism.

Other Agencies

11.1.16 Apart from PDCOR, there are other agencies that assist and facilitate private sector in investing in the state. The Bureau of Industrial Promotion (BIP) is the nodal agency that promotes setting up of private sector projects / units (in various sectors/ industries) in the state. BIP has also made the single window for clearing all medium and large-scale projects.

11.1.17 Rajasthan Financial Corporation (RFC), a state level funding institution, operates various loan schemes for the tiny, small and medium scale industries, many of them tailor made for specific entrepreneurial classes. RFC also undertakes activities such as underwriting, equity participation, collaborating as co-manager / advisor / consultant to public issues, etc.

Institutional Framework in Place

11.1.18 As seen above, the conventional institutional framework is in place in Rajasthan to enable direct and indirect development of tourism in the state. In addition, the state has recently carried out a variety of Institutional Incentives to improve and co-ordinate tourism development in the state as described below.

11.2 INSTITUTIONAL FRAMEWORK: RECENT INITIATIVES

11.2.1 The Government of Rajasthan has undertaken various institutional initiatives for tourism development in the state. Some of the initiatives taken by the Government are:

- **Rajiv Gandhi Tourism Development Mission** has been set up in 2001 under the chairmanship of the Chief Minister to ensure the time bound development of the tourism sector.
- A **State Tourism Advisory Board** under the chairmanship of the Chief Minister has been created for handling tourism-related policies and issue guidelines for the development of tourism in the State

- A **Standing Committee** under the chairmanship of Director, Tourism and comprising heads of various institutes of hotel management and tourism faculty has been appointed for promotion of education in tourism
- **Divisional Co-ordination Committees** for tourism have been setup to look after co-ordination of various agencies at the divisional level. This committee headed by the Divisional Commissioners, involves representatives of the travel trade, tourism professionals, INTACH and various private trusts managing heritage properties / monuments
- **District Tourism Promotion Committees** have also been setup headed by the District Collectors to seek more effective and active involvement of public representatives and Panchayati Raj institutions.
- The State Government is planning to establish a **Standing Committee for Redressal of Grievances** of the tourism industry and of inter-departmental nature. The committee would be chaired by the Secretary Tourism and would include representatives from the concerned departments and segments of tourism industry of the state.
- The State Government is also planning to enact the **Tourism Trade Regulation Act** to prevent exploitation of tourists. Under this act, the DoT will be empowered to license and inspect such establishments that are engaged in providing services to the tourists.

11.2.2 As can be seen the main thrust of these institutional initiatives is to provide an integrated decision making focus to the tourism sector in the state at a local, district, divisional and state level. These initiatives are a step in the right direction in terms of achieving better co-ordination amongst various agencies in the development of the tourism industry.

11.2.3 Given the fact that these Institutional Initiatives are already underway, the suggested focus areas for implementation are as follows:

Need for Common Vision/ Direction

11.2.4 The objectives and priorities of different departments having ownership of tourism assets and/ or engaged implementing tourism projects in the state need congruency with the overall objectives of tourism development. Often there are conflicting issues, for example, the objectives Forest Department and Archaeological Survey of India are to conserve their respective assets by restricting visitor arrivals at the sites managed by them while DoT's objective is to increase tourist arrivals at these very locations. Thus, there is a need for greater appreciation between various departments of the plans for tourism development in the state.

Need for clear norms on prioritisation of identified tourism projects

11.2.5 Prioritisation of tourism-related projects identified by DoT at the regional level is done often constrained by limited budget availability and/ or influenced by previous expenditure sanctioned in the region, which often results in an 'incremental' approach to project planning. This should ideally be done on a 'potential based/ tourism need based' basis to fully exploit the potential in the region.

Need for avenues for public / local community participation in planning

11.2.6 Whilst various of the initiatives mentioned earlier are underway, the existing framework needs to offer more opportunities for the local community to participate in the planning and decision making process for tourism development. In line with the State Government's vision of making the tourism industry a truly **People's Industry**, it is felt that local population should be involved in every aspect of policy making, planning and implementation. The role of the District level Tourism Promotion Committees that have been set up will thus be crucial to achieve these objectives.

Need for scientific planning and monitoring of tourist movements

11.2.7 The present mechanism for monitoring tourism movement in the state needs standardisation and use of scientific techniques. Worldwide tourist trends are closely monitored for making important decisions such as capacity planning, creation of new tourism infrastructure, developing new products and attractions and also in marketing of the products. Monitoring also helps in measuring economic impact of tourism through suitable cost-benefit evaluation and input-output analysis, and thus overall tourism policy planning for the state.

Empowerment of Regional Offices of DoT and Bottom-up Approach to Tourism Planning

11.2.8 Regional officers of DoT are more attuned to the ground realities at the places in terms of expectations of the tourists, difficulties faced by them, changing tourists' trends, etc. Being close to the tourist gives them a better perspective in deciding upon the priorities. Given the same, a bottom-up approach to tourism planning in terms of identifying new tourist attractions and products and developing them to harness their full potential would be beneficial.

Explore the opportunity for setting up of a state level equivalent of TFCI for funding tourism projects (especially in SME sector)

11.2.9 RFC is entrusted with the task of providing financial assistance to new investment ventures in the small and medium scale sector. Given the importance of tourism in the state economy and specific needs of the tourism industry there is an opportunity to explore the creation/ carving out of a specialist cell, which would primarily focus on funding required for tourism industry projects. This would be an equivalent of TFCI operating at the state level but with a greater focus on the SME enterprises within the tourism sector in the state.

Establishing a Tourism Monitoring Cell

11.2.10 It is essential that Rajasthan Government at all levels effectively monitor the various tourism developments in the state, benefits as well as the costs of investment in tourism infrastructure, infrastructure gaps, etc. on a continuous basis. Also, a system for measuring tourism industry performance needs to be institutionalised. This initiative would have to be ideally taken up at the state planning level as well as at the divisional level.

11.2.11 Monitoring of tourists would help in determining the value of tourism to the economy in terms of revenue generated by various sectors and the employment, income, taxes and other benefits. It is also an essential area for information for encouraging investment by the private sector. Overall, it would enable in tourism planning and developing policies and strategies for development of sustainable tourism in the state.

Conclusion

11.2.12 The investor in Rajasthan today seeks better government support not in terms of subsidies and financial assistance, but in terms of providing a healthy and hassle-free business environment.

11.2.13 With these initiatives it is anticipated that in the overall scenario, the role of DoT would be to act as a stimulus for the creation and development of a strong and vibrant tourism industry towards the socio-economic development of Rajasthan.

CHAPTER 12 :

STRATEGIC ACTION PLAN FOR TOURISM DEVELOPMENT IN RAJASTHAN

This chapter addresses the critical issues related to development of tourism in Rajasthan and provides strategic action plan for the same in terms of:

- Destinations and circuits
- New tourism products
- Area development through tourism
- Tourism infrastructure development
- Increasing tourism revenues
- Tourism Marketing
- Conclusion

12.1.1 The Strategic Action Plan for Tourism Development in Rajasthan should focus on the following:

- Creation of New Circuits/ Destinations
- Creation of New Tourism Products
- Tourism as a Vehicle for Area Development
- Creation of Tourism Relevant Direct Infrastructure
- Exploiting Opportunities to Increase Tourism Revenues
- Tourism Marketing

12.1.2 The following paragraphs discuss the key actions required for each of these areas.

12.2 DESTINATIONS AND CIRCUITS

12.2.1 Overall development of tourist potential of Rajasthan can be achieved both by development of existing destinations and by creating travel itineraries that link these destinations with each other and with lesser known destinations in the state***. This has already being done to a large extent in Rajasthan by identifying tourist circuits.*** Although the circuit-concept has been overall successful, there is a need for spreading the tourists and their spends equitably in the state.

12.2.2 Creating new circuits based on 'themes' would be essential to harness the untapped potential of some tourist places. The need for the future is to develop the 'not-so-popular' circuits in the state.

STRATEGY	ACTION
Promote lesser explored destinations	• Provide basic tourist infrastructure and reliable services at these destinations • Establish local level marketing association jointly with the private sector to design specific marketing and promotion incentives and activities
Promote lesser explored circuits	• Initiate joint marketing and promotion action with Central Govt. and neighbour states wherever opportunity exists. For example, Hadoti and Vagad circuits • Looking at the tourist response, provide upgraded and new amenities and services to meet their needs

12.3 NEW TOURISM PRODUCTS

12.3.1 Rajasthan should change its perception as being merely a heritage and cultural tourist destination by offering tourist a diverse range of new tourism products, which would attract an entire new class/ category of tourist in the state as indicated below.

STRATEGY	ACTION
1. Renew tourist interest in the state by creating new tourism concepts and products	• Identify sites and their potential to develop specific 'tourism products' • Create tourism magnets based on the recreational activities, family entertainment and leisure facilities • Explore possibility of developing new products like a) 'Boutique' resort tourism b) Archaeological tours related to ancient sites c) Tribal culture tours d) Sports tourism (Desert rallies, water sports/ regattas, Polo tournaments, Equestrian events, Golf tournaments) e) Adventure tourism (mountaineering, paragliding/ handgliding, ballooning, bungy jumping, etc.) f) Additional emphasis on promoting emerging (and already experimented) "niche" tourism products such as Rural tourism and Eco-tourism g) Market the products special interest segments
2. Creation of Tourism Zones for Specific Tourism Products	• Desert Circuit could be developed and marketed for 'Adventure' and 'Rural' tourism • Ajmer-Pushkar Circuit could be developed as a 'Religious' Tourism Zone, offering integrated pilgrim infrastructure • Jaipur-Alwar-Sariska could be developed and marketed as 'Ethnic n Corporate' zone, with a greater focus on weekend and conference/ incentive

STRATEGY	ACTION
	tourism given its proximity to Delhi • Kota-Bundi could be developed and marketed as an undiscovered 'Nature and Heritage' zone

12.4 AREA DEVELOPMENT THROUGH TOURISM

12.4.1 Tourism can also be the main vehicle for area development. For example, Merwara-Marwar circuit (specifically Ajmer-Pushkar) attracts the largest number of individual tourists in the State, yet in terms of tourist spends and contribution to the local economy the circuit is amongst the lowest in the state given the large number of pilgrim-tourists arriving at these places. With an area development approach the focus of efforts to develop this circuit would be on offering the visiting tourist more avenues to spend. The mechanics of such an approach taking Ajmer-Pushkar as an example is indicated below.

STRATEGY	ACTION
1. Integral Development of Ajmer-Pushkar	• Improve civic infrastructure in Ajmer and Pushkar (water, power, roads exportation) • Undertake comprehensive 'clean and green' Ajmer-Pushkar programme by focusing on solid waste and sewage disposal, water supply, drainage, lake cleaning and city beautification • Reduce traffic-related air pollution by imposing restriction on vehicle movement within the city • Implement landscaping at key tourist attractions in the cities
2. Create low-impact, non-degrading tourist infrastructure in the region	• Encourage spreading of tourism activity outside Ajmer-Pushkar by imposing restrictions on Hotel construction in the towns • Aggressively promoting new tourist destinations around Ajmer-Pushkar and diverting the tourists to these places by providing basic tourism infrastructure • Decongestion of roads by restricting vehicular traffic near the pilgrim centres
3. Increase avenues to generate income from tourist activities	• Encourage construction of mid-priced and luxury hotels in the region • Creation of entertainment and leisure facilities in the region • Developing domestic airport and introducing regular air-services to Ajmer • Promote the proposed airport as a gateway airport for tourist indenting to cover multiple tourist circuit in the state • Build the promotional campaign of Ajmer-Pushkar around the theme of 'Gateway to the heart of Rajasthan'

12.5 TOURIST INFRASTRUCTURE

12.5.1 Rajasthan has an overall well developed tourism infrastructure at most of tourist locations. However for new tourists destinations to develop, it would be of paramount importance to provide good air, rail and road links, last-mile connectivity to tourist sites, civic amenities and direct infrastructure like hotels, travel and tour services, interpretation services. The focus areas for the same are as indicated below.

STRATEGY	ACTION
1. Enhancement of Connectivity infrastructure	• Prioritise airport projects. For example, Jaipur Airport upgradation, New Airstrips at Ajmer • Encourage charter air service companies to supplement scheduled services • Private sector participation in providing last-mile connectivity to the attractions • Identify and prioritise railway network upgradation and modernisation programme, with special attention given to routes linking tourist regions, destinations and centres • Upgraded/international standard tourist taxi/coach services • Introduce metered taxi/rickshaw services in main cities
2. Provide high quality hospitality experience	• Solicit foreign investment in hotels segment • Inculcate aspects of traditional hospitality in the service offered by the hospitality industry
3. Enhanced tourist experience as they move around in the state	• Provide navigational aids on all tourist routes (e.g. signage and information on wayside facilities) • Provide upgraded / standardised tourist facilities (restaurants, models, TRCs, wayside facilities, etc.) • Provide site interpretation aids at all tourist places • Ensure availability of organised guide services at important tourist location

12.6 INCREASING TOURISM REVENUES

12.6.1 Tourism revenue can be increased in several ways. These include:

- Increasing tourist numbers
- Increasing the tourist season
- Increasing average length of stay (ALOS) of tourists
- Increasing daily expenditure of tourists through providing more spending opportunities.
- Attracting high yield (*avant garde*) tourists/ specific interest tourists.

12.6.2 Growth of tourists in Rajasthan and their ALOS in the state would, to a large extent, depend upon the novelty and uniqueness of tourism experience in the state. This will have to be effectively advertised and promoted to the various tourist groups.

12.6.3 An important issue for Rajasthan tourism is the significant decline in tourist arrivals in summer months (April-June). The focus areas for increasing tourism revenues are as indicated below.

STRATEGY	ACTION
1. Extension of tourist season in the state	• Develop seasonal themes and product packages of experience appropriate to different seasons 1. Promote the water bodies, hills and jungles of Mewar, Vagad and Godwar during summer season – Create resorts at appropriate places 2. Promote Hadoti and Brij Mewat circuits in Monsoon by creating products like jungle treks, water / canal safaris, wildlife trails. 3. Showcase the luminance and grandeur of Jaipur during the Diwali Season.

STRATEGY	ACTION
2. Increase Average length of Stay (ALOS) of tourist in the state.	• Reviewing and remodeling of local sight seeing tours to extend duration of stay at a place • Focussed marketing of lesser explored tourist attractions around the place to make them an inevitable part of the local sight seeing itinerary • Convince tour operators and guide to standardise itineraries to avoid unhealthy competition • Create new attractions and tourism products
3. Increasing daily span of tourist activity	• Introduce events in the evening • Popularise site-visitation after sunset • Activities for the tourist leisure time 1. Passive – Parks & Gardens, Fountains, Lighting of Monuments 2. Active – Shopping, live performances, food festivals, food plazas / food courts, light and sound shows
4. Increasing daily tourist spends	• On travel 1. Novel concepts like Open top/ Glass top/ double decker buses. 2. Special tourist shuttle services between local attractions- Provides flexibility to plan the excursions 3. Traditional models like horse carriages, camel carts, etc. • On accommodation 1. Help tourists upgrade from economy to mid-priced / luxury hotels 2. Value added services at hotels like health spas, sauna & Jacuzzis, ayurvedic treatment, Yoga and meditation, live performance. • On food and beverages 1. Specialty and fine dining restaurants 2. Food courts 3. Local cuisine restaurants • On recreation 1. Theatre, music and dance performances 2. Amusement parks / water parks. 3. Theme villages, cultural complexes 4. Boating. 5. Wildlife sanctuaries / Adventure activities • On Shopping 1. Shopping arcade. 2. Handicrafts and souvenir stores. 3. Duty free shops at International Airport at Jaipur • Others 1. Entry charges at tourist location. 2. Charity for conservation causes
5. Attract specific interest / high yield tourists	• Create and target specific products to special interested tourist groups. 1. Honeymoon package 2. Adventure package 3. Nature lovers package 4. Educational tours 5. Corporate tour package • Identify special interest groups and market products through appropriate channels – Segmentation, Targeting and Positioning.

12.6.4 Showcasing and display of manufacturing techniques of handicrafts and textiles in the state would reinforce tourists awareness of the products cultural and heritage value. The Shilpgrams in the state have been successful in propagating this concept of interactive tourism. Such concepts, termed as ‘Artists Villages’ are bound to increase the potential for additional sales of souvenirs and handicrafts.

12.7 TOURISM MARKETING

12.7.1 In an evolved state like Rajasthan, the overall responsibility of marketing of tourism in the state rests with the State Government, while individual private sector participants (hotels, tour operators, etc.) are involved in marketing and promotion activities at local firm level.

12.7.2 A large part of tourism success would depend upon marketing the attractions and products to precisely targeted bases. A professional tourism marketing approach needs to be developed at state as well as the industry participant level to co-ordinate in the promotion exercise as indicated below.

STRATEGY	ACTION
1. Research based marketing and promotion campaign	• Constitutionalise a market research and monitoring cell • Establish a system of collection and analysis of statistics related to tourist arrival in the state • Co-ordinate / co-operate with the Central Governments programme of detailed market research in key markets of Europe and Asia • Design./ Create specific activities targeted at segments and riches for which products have been developed
2. Reorganisation of Tourism promotional activity in the state.	• Establish joint- sector promotion body ensuring effective representation of all tourism shareholders • Co-ordinated marketing efforts with the Central government and with other states • Standardisation of communication material • Developing consistent sales training and product education for personnel at customer touch points • Building close working relationship with the carriers and wholesale inbound operators
3. Attracting new tourist categories/ groups	• Focus on MICE segment (Meetings, Incentives, Convention and Exhibition) and Creation of convention centres • Developing spin-off business from major national and international events and activities particularly in Delhi • Niche tourism activities like Eco-tourism and Rural tourism.
4. Online/ Internet booking	• Interactive itinerary planning (locations to visit, travel options, accommodation) • Online reservation system (for example, internet booking at all RTDC hotels showing status of occupancies). Also extending 'early bird' incentives to tourists planning their tour itineraries well in advance.

12.7.3 The key would be to design marketing strategies and tactical campaigns that will match Rajasthan's competitive strengths with the needs of specific tourist groups- thus a segmented approach is required rather than a 'mass promotion' approach. thereby building market share and deliver revenue and yield performance.

12.8 CONCLUSION

12.8.1 Before embarking on any kind of activity there needs to be clarity on a few issues related to tourism. Some of the important issues that need to be addressed are:

What constitutes a 'tourist'?

12.8.2 Tourism development in Rajasthan till the recent past was centered on the tourist who was colloquially as a person traveling for leisure, recreation and holidays. In today's context, this definition of 'tourist' is too narrow for tourism planning purpose. In a broader sense a tourist would be defined as a person who 'travels away from home' and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited, whatever his reason be. Broadly these reasons could be classified as below:

- Leisure, recreation and holidays
- Visiting friends and relatives
- Business and professional
- Health treatment
- Religion and pilgrimage
- Others (weekly *haats*, etc.)

12.8.3 The rationale for including these categories is that these activities contribute to the local tourism economy. These categories would include the foreign, the inter-state as well as the intra-state traveler.

<u>How to collect tourist data?</u>

12.8.4 Presently tourist arrival is monitored either at the hotels or a 'must visit' location in the city. However, there are several limitations of the system. For example, a 'day traveler' to a city would not be recorded in the statistics collected at the hotels and a 'repeat traveler' would not figure in the records if he decides to exclude the 'must visit' location from his itinerary.

12.8.5 Thus, there should be a thorough planning in tourist statistics collection in terms of deciding the best method for each important tourist location/ hub. For example, in a place like Jaipur, which also receives day-business travelers in large numbers, hotel statistics would not reflect this category of travelers. Thus, tourist arrival data for Jaipur could be appropriately captured at multiple locations in the city like entry points, central bus depots, railway stations, airports, 'must see' locations like Hawa Mahal or Amber Fort, etc. and appropriate derating factor applied to account for duplication in data collection. However, for Ajmer, the statistics could be collected only at one point, which is the Shrine.

<u>How much does tourism contribute to the state economy?</u>

12.8.6 The economic and employment impact of Tourism cannot be separated from the need for effective measurement of the sector and its impact on the wider economy. Presently, tourism as an industry is not specifically identified in the system of State accounts – rather its components are scattered throughout the accounts.

12.8.7 There is a need to develop a comprehensive ***Satellite Accounting System*** to measure the impact of Tourism on the state economy. Satellite Accounting provides information on a field of economic activity, and is generally tied to the economic accounts of the state. The account uses concise definitions of tourism and attempts to provide a clear and real measure of tourism-related economic activity. Both the direct and indirect tourism activities are accounted for in the areas such as, but not limited to, demand, supply, employment, taxes, etc. Such a tool is crucial in determining the complex spending patterns of visitors as well as the goods and services that cater to their needs.

12.8.8 Some of the advantages of Tourism Satellite Accounting can be summarised as follows:

- They identify the amount of benefit enjoyed by various sectors, and the employment, income, taxes and other benefits that flow from these sectors
- They provide a comprehensive picture of the size and scale of tourism in the state, and can help to gather support for ensuring adherence to the principles of sustainable tourism development
- They help the state and businesses determine the value of tourism to the economy, and thereby develop strategies for ensuring competitive advantage

12.8.9 The basis of Satellite Accounting lie in the fact that tourism 'industry' is defined not by the suppliers of its output, but by the consumers of its output. The producers within the tourism industry do have something in common, but instead of it being common goods or services that they produce, it is the fact that their output is purchased by a particular group of customers, namely tourists.

12.8.10 As such the tourism industry that is measured in tourism satellite account cuts across many industries in the state economy. As an example, the public transportation industry. In the state accounts, this industry will be defined as all suppliers of public transportation (State Transport Corporation, private tour operators, taxi operators, rickshaws, etc.). At the same time, however, a portion of this industry that is consumed by tourists will also contribute to the tourism industry. Thus, the tourism industry exists implicitly within the core state accounts, as part of many different industries, such as accommodation, transportation, restaurants, retail, and amusement and recreation.

How to plan for tourism growth in the state?

12.8.11 The over consumption of resources by tourists and tourism infrastructure is incompatible with sustainable development of tourism in the state. The carrying capacity at several places like Ajmer, Mount Abu, Jaipur, Udaipur in Rajasthan has exceeded with the increase of tourist inflow. There is a risk of tourist demand for resources (land, water, energy) competing with the needs of local population thereby increasing social inequality and injustice.

12.8.12 Tourism in Rajasthan, which was mainly mass tourism in the past was 'producer driven'. The industry today is becoming increasingly consumer-driven. A well informed, responsible tourist is putting increasing pressure on the tourism industry to behave more responsibly. As a result, the industry is aligning itself to address issues of carrying capacity.

12.8.13 The issue of carrying capacity has often been addressed by developing alternate tourist locations, thereby redistributing the tourist activity. However, this is easier done with activity driven tourism. Given the nature of tourism in Rajasthan, which is more passive (sight seeing), it would be difficult to address the issue of carrying capacity purely by creating or promoting new locations. Existing locations such as Ajmer, Jaipur, Udaipur would continue to attract a large number of tourists arriving in the state due their importance.

12.8.14 Tourism industry in Rajasthan lacks information on the requirements of sustainable tourism and on how to integrate economic interests with environmental and social requirements. While the tourism industry in Rajasthan may be willing to improve their products and services, there would be an imminent conflict between the industry's pursuit of economic gains and social and environmental responsibility.

12.8.15 Consumer behaviour in tourism is both a product and the cause for change in policies by the government and industry. Therefore, a comprehensive approach is required to solve the problems associated with market-driven tourism. Some of the recommendations that would influence tourist consumer behaviour are as provided below:

- Presently the usage of mass media to promote tourism in Rajasthan is restricted to advertisements, painting images of destinations rather than providing relevant information for potential travelers. Mass media can be effectively used to influence travel decisions and consumer behaviour in the destinations.
- There is a lack of reliable and appropriate research data on the determinants of tourist demand, motivation and behaviour. Statistics should be maintained and, if required, periodic researches undertaken to assess emerging tourist trends and identify sustainable alternatives.
- The key to develop effective partnerships in tourism industry in Rajasthan is to remove the imbalance in power between the different stakeholders. The tour operator and guides wield a considerable influence on the tourist flow and activity in the state. As a result most tourist activity in the state is concentrated in a few pockets. Hotels established outside the main tourist hubs attract only foreign tourist groups. Tour operators should be educated on the importance of carrying capacity and the need to spread the tourist activity away from the congested places.

12.8.16 The most obvious of the instruments and remedial measures available are:

- Legal measures: Rules and regulations that monitor the growth of tourism infrastructure at a particular place or an area. This could be mainly in form of restriction on the construction of new hotels and other accommodation facilities.
- Market based instruments such as taxes to influence market prices of tourism products and services.
- Industry self-monitoring: A self imposed code of conduct across the tourism industry participants like hotels, tour operators, guides, taxi operators, etc.
- Good local transport facilities: To ensure tourist movement away from the hubs, it is essential that adequate and affordable local transportation facilities must be provided for the tourists.

12.8.17 Thus, as seen above there is a strong need to have a holistic approach to tourism development, which is sustainable, participative and responsible leading to overall development of the state.

Appendix 1

Guidelines to be followed By State Govt./ UTs for Preparation of 20 Years Perspective Plans

Sr. No.		GUIDELINES	DoT, GoI Ref.
A	i)	**Tourist sites - Inventory and traffic**: The plan should be able to assess the existing tourism scenario in the State/ Union Territory with respect to existing traffic levels and inventory of: ➢ natural resources ➢ heritage and other socio-cultural assets ➢ quantitative/ demographic factors like population, employment, occupation, income levels, etc. ➢ services and infrastructure already available	(iv)
	ii)	**Existing tourism development plans**: The plan should review the status of existing development / investment plans of scheme for the development of tourism in the region.	(v)
	iii)	**Existing infrastructure**: The plan should assess the existing infrastructure level at identified destinations/ centre in terms of quality of roads/ transportation facilities, civic amenities, enroute transit facilities, boarding and lodging facilities etc.	(viii)
	iv)	**Tourist sites - Inventory and details**: The plan should list and evaluate existing/ potential tourist destination and centres and categorise them on the basis of inventory of attractions, infrastructure availability, degree of popularity, volume of traffic flow etc.	(vi)
	v)	**Tourist sites - Categorisation according to existing and potential**: The plan should analyse and categorise existing/ potential destinations and centres, as a stand-alone destination, part of a circuit and/ or as major attractions for special interests groups, etc.	(vii)
	vi)	**Tourist arrival forecast**: The plan should indicate the actual and the projected number of domestic and foreign tourist arrivals for each proposed tourist place.	(xv)
	vii)	**Tourist traffic - Existing and Forecast**: The plan should be able to broadly assess traffic flow to identified destinations and centres for assessment of infrastructure requirements taking into account past growth trends, suggested linkages and integration, future expected development including likely investments by the State and investment climate/ incentive for the private sector, etc.	(ix)
B	viii)	**Projects - Existing and New**: The plan should identify the existing as well as new tourism projects including projects for expansion/ augmentation, upgradation of facilities and services destinations and centres, which have potential for development.	(xi)
	ix)	**Project feasibility studies**: The plan should undertake product conceptualisation cum feasibility exercise inter-alia for identified projects covering aspects like locational evaluation, schematic product planning and conceptualisation including quantification of individual project parameters, assessment of overall investment levels and of project viability cum feasibility study exercises etc.	(xii)
	x)	**Employment potential of projects**: The plan should include project-wise potential for employment generation, a reasonable percentage of potential employment is to be reserved for women.	(xiv)
	xi)	**Employment potential of projects**: Prioritise the scheme on the basis of employment potential of the project and the tourist arrivals at the proposed place.	(xvi)
	xii)	**Environmental issues**: It is necessary that the environmental issues are dealt with in sufficient details and environmental impact assessment studies made in	(xxvii)

Sr. No.		GUIDELINES	DoT, GoI Ref.
		respect of all new projects.	
	xiii)	**Environmental issues**: Measures necessary for mitigating the adverse environmental impacts and rehabilitating the tourism places already environmentally damaged should be incorporated in the perspective plans.	(xxix)
	xiv)	**Projects-Desirable features**: The perspective plans should include carrying capacity studies, instruments of spatial and land use planning, instruments of architectural controls for restoration of old properties and construction of new ones in old towns and cities, strategy for local community participation and protection of cultural identity, awareness programmes for local participation and local commitment to the project.	(xxviii)
	xv)	**Infrastructure projects and investments**: The plan should attempt and arrive at an indicative cost configuration of likely investment on infrastructure development under different heads and to prioritise investment needs by drawing up a phased investment plan covering the next 20 years.	(x)
	xvi)	**Infrastructure projects**: An inventory of existing infrastructural facilities (including paying guest facility) is to be made, after which, the proposed infrastructure needs to be split up into various segments concerning different State Government Departments, such as PWD, Forest, Culture, Handicrafts, etc., and dovetailed with the Tourism Plans.	(xvii)
	xvii)	**Project funding:** Since the perspective plan would be used for external assistance, it would be desirable to suggest State tourism projects to foreign funding agencies for financial assistance; each project has to be properly scrutinised and finalised accordingly.	(xviii)
	xviii)	**Project funding**: Other sources of funding such as loans from the Financial Institutions, the Tourism Finance Corporation of India (TFCI) etc. need to be explored. Besides, proper incentives need to be suggested for private sector participation.	(xix)
	xix)	**Privatisation / Private sector participation**: The perspective plan should incorporate attractive packages/ schemes to attract private sector investment.	(xxvi)
	xx)	**Action plan for implementation**: The plan should prepare an action plan for implementation of identified potential development schemes/ projects/ products and for development of infrastructure in conformity with the policy objectives and guidelines provided by the conformity with the policy objectives and guidelines provided by the concerned state/ central agencies/ departments and the requirements of national development and funding agencies. The overall development plan to also take into account WTO's Bali declaration on tourism development.	(xiii)
	xxi)	**Infrastructure development - Role of state**: Further the available institutional machinery in the state to oversee / coordinate the development of tourism infrastructure has to be specifically suggested.	(xx)
C	xxii)	**Cultural complexes**: Cultural complexes can be suggested with the financial help from the State Department of Culture and later made economically viable on pattern of Dilli Haat.	(xxii)
	xxiii)	**Cultural complexes**: Facilities for performance by local artists, cultural troupes should be built into the perspective plan.	(xxi)
	xxiv)	**Cultural / handicrafts**: Handicraft shops should be suggested at various tourist places; these could be run by women.	(xxiii)
	xxv)	**Cultural / health**: Perspective plan should include potential developing health resorts at/ near the tourist places. Yoga classes, nature cure facilities, ayurvedic system of medicines should be available at these places to attract tourists	(xxiv)
D	xxvi)	**Privatisation / Private sector participation**: The perspective plan should include strategy for privatisation of the tourism-related properties owned by the State and the State Tourism Corporations.	(xxx)
E	xxvii)	**Implementation / Action plan – Year-wise planning of investment**: A perspective plan with a time frame of 20 years needs to be developed for developing sustainable tourism giving year-wise phasing of investment having	(i)

Sr. No.		GUIDELINES	DoT, GoI Ref.
		regard to the resources available. Department of Tourism shall provide Central financial assistance for this purpose subject to the maximum of Rs. 20.00 Lakhs.	
	xxviii)	**Implementation / Action plan - Short / Long term**: The plan should indicate short-term and long-term plans, targets and ground realities.	(ii)
	xxix)	**Implementation / Action plan - Role of various agencies**: The plan should indicate all activities to be undertaken by different agencies clearly indicating the time frame for each activity.	(iii)
	xxx)	**Executive Summary**: Consultant preparing the perspective plan should be asked to given an executive summary of the plan along with the report.	(xxv)

APPENDIX 5

List of Heritage Hotels in Rajasthan

Sr.No	Name of the Hotel	Place / City	No of Rooms	Type
1	The Ramgarh Lodge	Jaipur	11	Doubles
2	Raj Mahal Palace Hotel	Jaipur	38	Suites
3	Narain Niwas Palace	Jaipur	38	Doubles
4	Achrol Lodge/House	Jaipur	6	Rooms
5	Rambagh Palace	Jaipur	102	Rooms
6	Alsisar Haveli	Jaipur	33	Rooms
7	Chirmi Palace Hotel	Jaipur	24	Rooms
8	Bhanwar Vilas Palace	Jaipur	27	Rooms
9	Sawai Madhopur Lodge	Sawai Madhopur	32	Rooms
10	Royal Castle Kanota	Jaipur	10	Rooms
11	Roopniwas Palace	Jhunjhunun	30	Rooms
12	Raj Mahal Palace	Tonk	12	Rooms
13	The Hill Fort	Alwar	21	Rooms
14	Brijraj Bhawan Palace	Kota,Jaipur	7	Rooms/Suites
15	Sukhdham Kothi	Kota	14	Rooms
16	Pushkar Palace	Ajmer	39	Rooms
17	Roopangarh Fort	Ajmer	20	Doubles
18	Haveli Sher Garh	Kota	4	Rooms
19	Hotel Bissau Palace	Jaipur	45	Rooms
20	Mukundgarh Fort Hotel	Jhunjhunun	49	Rooms/Suites
21	Samode Bagh	Jaipur	44	Tents
22	The Fort Uniara	Tonk	10	Rooms
23	Castle Awan	Tonk	10	Rooms/Suites
24	Karauli House	Karauli	5	Rooms/Suites
25	Golden Castle Resort	Sikar	16	Rooms
26	Neemrana Fort	Alwar Dist	41	Rooms
27	Hotel Sariska Palace	Sariska, Alwar Dist		
28	Raj Palace	Jaipur	38	Suites
29	Pachewar Garh	Malpura Dist, Jaipur	20	Rooms
30	Chandra Mahal Haveli	Bharatpur	23	Doubles
31	Samode Haveli	Jaipur	22	Rooms
32	Lakshmi Vilas	Jaipur	33	Rooms
33	Raj Palace	Jaipur	25	Suites
34	Narain Niwas	Jaipur	38	Rooms
35	Khasa Kothi	Jaipur	36	Rooms
36	Laxmi Vilas Palace	Bharatpur	25	Rooms/Suites
37	Diggi Palace	Jaipur	44	Rooms
38	Haveli Braj Bhushan	Bundi	15	Rooms
39	Hotel Bhadrawati Palace	Bhandarej	38	Rooms
40	Castle Bijaipur	Chittorgarh	24	Rooms

Sr.No	Name of the Hotel	Place / City	No of Rooms	Type
41	Dundlod Fort	Jhunjhunu		Doubles
42	The Piramal Haveli	Bagar	8	Rooms
43	Samode Haveli	Gangpole	18	Rooms
44	Balsamand Palace	Jodhpur	35	Rooms/Suites
45	Hotel Jhalamand Garh	Jodhpur	23	Rooms
46	Fort Chanwa	Luni, Jodhpur	31	Rooms
47	Royal Rajwada	Bhadrajun, Jodhpur	12	Rooms
48	Ranbanka Palace	Jodhpur		
49	Sardar Samand Palace	SardarSamand, Jodhpur		Rooms
50	Jagram Durg	Pali Dist, Udaipur	14	Rooms
51	Karni Bhawan Palace	Jodhpur	32	Suites
52	Karni Kot	Sodawas	31	Rooms
53	Khimsar Fort	Pali Dist, Udaipur	50	Rooms
54	Ajit Bhawan Palace	Jodhpur		
55	Rawla Narlai	Between Udaipur & Jaipur	19	
56	Hotel Rohet Garh	Rohet, Pali Dist	25	Rooms
57	Cama Rajputana Club Resort	Mt Abu	42	Rooms
58	Hotel Raj Palace	Bhatiyani Chohtta, Udaipur	26	Rooms
59	Laxmi Vilas Palace Hotel	Udaipur	54	Rooms
60	Fateh Prakash Palace	Udaipur	17	Rooms
61	Hotel Connaught house	Mt Abu	14	Rooms
62	Royal Castle Ghanerao	Pali Dist, Udaipur	20	Rooms
63	Deogarh Mahal	Rajsamand, Udaipur	30	Rooms/Suites
64	Fort Dhariyawad	Dhariyawad, Udaipur	16	Rooms/Suites
65	Udai Bilas Palace	Dungarpur	17	Rooms
66	Hotel Caravanserai	Udaipur	24	Rooms
67	Rang Niwas Palace	Udaipur	20	
68	Shiv Niwas Palace	Udaipur	34	Rooms/Suites
69	Laxmi Niwas Palace	Udaipur	54	Rooms/Suites
70	Bijay Niwas Palace	Chittorgarh	18	Rooms/Suites
71	Palace Hotel	Mt Abu	35	Rooms/Suites
72	Shikarbadi	Udaipur	25	Rooms
73	Maharani Bagh Orchard Retreat	Ranakpur, Udaipur	18	Cottages
74	Kesar Bhawan Palace	Mt Abu	23	Doubles
75	Kotri Raola	Kotri	10	Rooms
76	Karni Bhawan Palace	Rajasthan	14	Rooms
77	Hotel Laligarh Palace	Bikaner	38	Rooms
78	Bhanwar Niwas Palace	Bikaner	26	Rooms
79	Gajner Palace	Bikaner	42	Rooms
80	Maan Bilas Palace	Bikaner	9	Rooms
81	Hotel Basant Vihar Palace	Bikaner	21	Rooms
82	Gorbandh Palace	Jaisalmer	67	Rooms
83	Narayan Niwas Palace	Jaisalmer	43	Rooms
84	Shahpura Garden	Shahpura	4	Doubles/Suites

Appendix 6A

List of Proposed Road Construction and Maintenance Projects

Desert Circuit

District	Nature of work	Budgeted Expenditure (Rs. Lakhs)	Length of Road (Kms.)
Bikaner	Widening of approach road to Gajner village	25.00	3.00
	Widening of road from Shivbadi to Camel Farm	7.50	0.50
	Construction of road to Hotel Bhawar Nivas, Old city	5.00	0.50
	Maintenance work of road from Katriyasar to Ranisar	10.00	10.00
Jodhpur	Construction of Bypass (Ring) roads around Jodhpur city	100.00	40.00
Jaisalmer	Construction of Link road from Khabha to Sam	12.00	20.00
	Construction of road from Ramghad Road to Shilpgram	3.00	N.A.
	Construction of road from Lodurva to Amar Sagar Jain temples	2.50	0.50
	Construction of road from Khabha village to Khabha Fort	7.50	1.50
	Construction of road from Ashapurn Mandir to Devi Kot	2.50	0.50
	Construction of road from Khulyala Math to Myajlar Pouchina	15.00	3.00
	Construction of road from N.E.S. Road to Cenotaphs (Pokharan)	5.00	1.00
	Construction of road from Nandloi to Nadhi (Pokharan)	15.00	3.00
	Maintenance of road from Lakshman Kata to Sangri	5.00	N.A.
	Construction of road connecting Bhairu Caves (Sathalsar) to Sati temples (cenotaphs) in Pokharan	5.00	5
Total		220.00	

Mewar Circuit

District	Nature of work	Budgeted Expenditure (Rs. Lakhs)	Length of Road (Kms.)
Udaipur	Maintenance of road to Jagat	5.00	52.00
	Development of Parshuram Mahadeo road	1.50	NA
	Beautification of road to Sajjangarh Road	10.00	NA
Chittaurgarh	Widening of the Fort road	10.00	NA
	Construction of road from Bassi hospital to Bassi Heritage hotel	5.00	1.00
	Construction of road from Vijaypur village to Heritage hotel	3	0.50
	Tar surfacing of road from Meenal main road to temple	1.50	0.25
	Maintenance of road from Kapasan to Matrukundia	5.00	11

District	Nature of work	Budgeted Expenditure (Rs. Lakhs)	Length of Road (Kms.)
	Construction of approach road to Mandalgarh	5.00	NA
	Construction of road to Niliya Mahadeo Lake	7.50	5
	Maintenance of road from Chittaurgarh to Bassi	4.00	12
	Maintenance of road from Chittaurgarh to Jahria Mahadeo	10.00	NA
	Maintenance of road from Chittaurgarh to Meenal	22.50	90
	Maintenance of road from Rashmi to Matrukundia	1.25	5
		91.25	

Vagad Circuit

District	Nature of work	Budgeted Expenditure (Rs. Lakhs)	Length of Road (Kms.)
Banswara	Construction of roads connecting Arthuna temples	15.00	NA
	Construction of road from Surya Mandir to Hanuman Mandir (Talwada)	2.50	NA
	Construction of road from Banswara bridge to temple	2.00	NA.
	Construction of approach road Kagdi waterfalls	20.00	8
	Construction of approach road to Amlipada waterfalls	0.50	1.50
	Construction of approach road to Juanda waterfalls	7.50	3.00
	Construction of approach road to Jheela waterfalls	3.00	3.00
	Road and footpath construction in Mangad dham	15.00	1.50
	Construction of roads connecting scattered 'Kalpvriskh' in Banswara	15.00	NA
Dungarpur	Construction of road from main road to Udai Nivas Palace	5.00	NA
	Construction of road from Juna Mahal to Udai Nivas Palace	5.00	NA
Total		**90.5**	

Dhundhar Circuit

District	Nature of work	Budgeted expenditure (Rs. Lakhs)	Length of road (Kms.)
Jaipur	Construction of road upto Sambhar Debyani	8.00	NA
	Construction of road from Maukhampur to Sambhar	10.00	NA
	Repairs of road from Chomu (NH11) to Samode Haveli	12.0	6
Dausa	Construction of stretch between the main road to Bhagwati Palace	7.5	3
Tonk	Road connecting Malpura to Pachewar	24	21
	Road connecting Hati Bhata to Sawai Madhopur	80	40

District	Nature of work	Budgeted expenditure (Rs. Lakhs)	Length of road (Kms.)
	Road connecting Tonk to Todaraisingh	160	80
	Road connecting Tonk to Diggi	100	50
	Road connecting Newai to Diggi	80	40
	Road connecting Tonk to Bisilpur	30	15
	Road between Dudu to Pachewar	48	24
	Total	**559.5**	

Godhwar Circuit

District	Nature of work	Budgeted expenditure (Rs. Lakhs)	Length of road (Kms.)
Sirohi	Approach road to Mini Nakki Lake	4.00	NA
	Construction/ maintenance of approach roads to tourist attractions in Mount Abu	15.00	NA
	Construction of road from main road to Hotel Kaiser Palace	4.00	NA
Jalore	Construction of road from Jalore fort to the main road	15.00	NA
Pali	Surfacing of road from Bijova to Anjaneshwar Mahadev	15.00	7
	Surfacing of Jaipura- Khoud-Nadol road connecting Ranakpur	100.00	50
	Approach road from Futadiwal to Parshuram Mahadev	4.72	NA
	Upgradation of approach road to Ghanerao	10.25	NA
	Construction of road connecting Saibaba fair location to Marwar	0.85	NA
	Construction of road from Pushkar to Kurki	24.00	NA
	Construction of road connecting Kortatirth to NH14	200.00	NA
	Construction of road from Hotel Rohetgarh to the main road	10.00	NA
	Total	**402.82**	

Merwara – Marwar Circuit

District	Nature of work	Budgeted expenditure (Rs. Lakhs)	Length of road (Kms.)
Ajmer	Construction of road from highway to Mangliyawas	5.00	5
	Construction of roads till Baijnath	1.00	2
	Construction of road to Dhuleshwar Mahadeo Mandir, Torgarh	17.50	7
	Construction of road from Baghera and Junia to Kekdi	15.00	6
	Development of link road to Silora	25.00	10
	Development of road from Salemabad to Kekdi	27.50	11
	Development of road to Akshay Pol	7.50	3

District	Nature of work	Budgeted expenditure (Rs. Lakhs)	Length of road (Kms.)
	Construction of road from Mahida to Gauri kund Mataji	7.50	3
	Construction of road from State Highway to Khoda Ganesh	15.00	N.A.
	Construction of walking track and camel-cart road from Ajmer to Pushkar	9.00	N.A.
	Construction of walking track from Pushkar to Ajay San	10.00	N.A.
	Construction of approach road to Hingonia	20.00	N.A.
	Development and widening of Beawar – Taragadh road	100.00	N.A.
	Maintenance work of Prithviraj Chauhan road to Akbar Fort	15.00	N.A.
	Maintenance and construction of road from Fountain Square Daulat Bagh to Baradari	5.00	N.A.
	Development and widening of Kishengarh – Roopangarh - Salasar Balaji road	200.00	N.A.
	Construction of approach road from Ajmer-Kota road to Sarwad Fort	40.00	N.A.
	Development and widening of Kekdi – Diggi Kalyan road	70.00	N.A.
	Development and widening of Kekdi – Devli Mandalgarh – Menal road	240.00	N.A.
	Widening of road from Fountain Square to Foy Sagar	20.00	N.A.
	Construction of road from Foy Sagar to Ajai Pol	15.00	N.A.
	Construction of Pushkar – Motisagar – Savitri Temple road	20.00	N.A.
	Construction of road from Amartya Guni to Nagdev caves	160.00	N.A.
	Widening of Fountain Square – Dargah – Adhai-din-ka-Jhonpra road	20.00	N.A.
	Construction of road from Tatgarh to Dhuleshwar Mahadeo	50.00	N.A.
	Development and widening of Ajmer - Kishengarh – Diggi Kalyan road	300.00	N.A.
	Maintenance work of road from Pushkar Ghats to Budha Pushkar	12.00	N.A.
Nagaur	Construction of road from Bagot to village Badu	25.00	10
	Construction of road from Kurki temple, Nagaur to Richmaliya, Ajmer	30.00	12
	Construction of approach road to Veer Tejaji	10.00	N.A.
	Construction of road from Nagaur to Jhoranda	30.00	N.A.
	Construction of approach road to Veer Tejaji birthplace, Kharnal	3.00	1
	Development and widening of Merta – Harsaur – Parbatsar road	30.00	N.A.
	Construction of Bhawal Mata – Jagansar road	12.00	N.A.
	Construction of road from Shyam Nagar to Jhorda and Chau to Jhorda	3.00	N.A.
	Construction of road from Shyam Nagar to Dhudhra	9.00	9

District	Nature of work	Budgeted expenditure (Rs. Lakhs)	Length of road (Kms.)
	Development and widening of Bhakron – Harnova road	7.00	N.A.
	Construction of approach road to Tau Nagar	6.00	N.A.
	Construction of approach road to Sai Tak	0.50	0.50
	Total	**1592.5**	

Brij Mewat Circuit

District	Nature of work	Budgeted expenditure (Rs. Lakhs)	Length of road (kms.)
Alwar	Approach road to Kankwari fort	8.00	NA
	Construction of road from Kankwari to Neelkanth	24.00	8
	Connecting roads to Jaisamand from Alwar and Siliserh	7.50	5
Bharatpur	Reconstruction of the approach road to Jal Mahal-Kumher	8.00	1½
	Construction of the road to Fateh Burj	80.00	40
	Approach road to Deeg Palaces	5.00	1
	Road from Deeg to Govardhan (going to NH3)	30.00	10
	Road from Usha Mandir-Bayana	2.00	250 Mts.
	Road from Bharatpur to Nagar via Deeg	330.00	65
	Road from Bharatpur to Rupbas	150.00	37
	Bharatpur to Bund Baretha via Bayana	120.00	60
	Road repairs from Bharatpur bus stand to Sewar	8.00	1
	Bharatpur Bus stand to Keoladeo NP	8.00	3
	Repairs of the road between Rupbas to Bayana	90.00	45
Sawai Madhopur	Road to Jheral Balaji	10	2
	Approach road from Khandar village to Khandar fort	5.00	-
	Sitamata Kho	20.00	10
	Laxmi Narayan Mandir	20.00	10
	Bhagwatgarh	50.00	25
	Chauth Mata Mandir	160.00	82
	Siwar Isarda	80.00	40
	Sawai Madhopur Dausa via Lalsot	200.00	105
Karauli	Repairs of all Municipality roads	50.00	-
	Anjani Mata Mandir	6.00	
	Sagar Lake	5.00	
	Kalyanji Mandir	5.00	
	Timangarh Fort	12.00	
	Mandralmal Fort	10.00	
	Nidad Fort	10.00	
Dholpur	Approach road to Shergarh fort	6.00	1.5
	Approach road to Babar gardens	6.00	0.5
	Construction of road from Sarmathura to Damoh	30.00	10
	Road circling Machkund	24.00	
	Total	**1579.5**	

Shekhawati Circuit

District	Nature of work	Budgeted expenditure (Rs. Lakhs)	Length of road (Kms.)
Jhunjhunun	Construction of Link road from main road to Mahansar Fort	3.00	N.A.
	Construction of road from Udaipurwati to Shakambari	70.00	N.A.
	Construction of road from Jhunjhunun to Mahansar via Bissau	120.00	N.A.
	Construction of road from Khetri to Bhopalgarh	80.00	N.A.
	Construction of road from Bhagchand to Shiv Temple, Mandawa	20.00	N.A.
	Construction of approach road to Desert Resort, Mandawa	15.00	N.A.
	Repairs of road from Castle Mandawa to Main road	5.00	N.A.
	Construction of road from Fatehsagar to Mandawa	14.00	N.A.
	Construction of approach road from Dundlod Fort to main road	6.00	N.A.
	Construction of approach roads connecting havelis, cenotaphs, forts in the Mandawa area	30.00	N.A.
	Total	**363.00**	

Hadoti Circuit

District	Nature of work	Budgeted expenditure (Rs. Lakhs)	Length of road (Kms.)
Kota	Approach road upto the banks of Alanya river	10.00	5
	Roads near Bhanddeora and Ram Mandir	5.00	1.5
	Road from Keval to Alanya river	15.00	5
	Road from Keval to Rock Painting Point	10.00	5
Bundi	Approach road from Shikar Burg to Rameshwaram	20.00	10
	Approach road to Golpur Shail Painting on the Bundi Bhilwara raod	10.00	3
	Construction of road from Bhilwara road to Bhimtal waterfall	20.00	3
	Construction of road from TV tower to Taragarh	10.00	
	Construction of road from Hajari Darwaja to Chitrashala	5.00	
	Repair of the road from Garda to Palkan	30.00	8
	Repairs of the road from Taleda to Keshparaipatan	40.00	27
Jhalawar	Construction of approach road to Vinayak Buddhist Caves, construction of bridge and steps	20.00	8
	Construction of road from Main road to Gagron Fort	80.00	-
	Carpeted road from Gunayi village to Kolvi Caves	20.00	5
	Chapi dam to the Main road	28.00	7
Baran	Badodara to Shergarh road construiction	30.00	11
	Development of Shergarh as well as roads	30.00	2
	Road from Shergarh to Baran	30.00	

District	Nature of work	Budgeted expenditure (Rs. Lakhs)	Length of road (Kms.)
	Road from Parvati river to Bhanddeora	70.00	35
	Total	**483.00**	

Appendix 6B

List of Ongoing Hotel Projects Approved by DoT (2001-02)

Sr No.	Unit	Place	District	Cost (Rs. Lakhs)
1	Resort	Barighata	Sirohi	300.00
2	Hotel	Khilchipur	S. Madhopur	170.12
3	Resort	Khilchipur	S. Madhopur	128.66
4	Hotel Resort	Khilchipur	S. Madhopur	342.00
5	Hotel	Khilchipur	S. Madhopur	7.94
6	Hotel	Khilchipur	S. Madhopur	7.03
7	Hotel	Jatoli	S. Madhopur	54.40
8	Resort	Sherpur	S. Madhopur	46.44
9	Resort	Devnagar	Pushkar	667.45
10	Hotel	Desuri	Pali	158.36
11	Hotel (Dhaba)	Hemwas	Pali	1.50
12	Midway	Mundara	Pali	20.25
13	Hotel	Bali	Pali	25.20
14	Hotel	Mandli	Pali	202.11
15	Hotel / Restaurant	Fatehgad	Jaisalmer	7.12
16	Hotel cum Resort	Satta	Jaisalmer	16.12
17	Hotel Resort	Amar Sagar	Jaisalmer	65.32
18	Resort	Rupsi	Jaisalmer	6.20
19	Resort	Kanoi	Jaisalmer	15.75
20	Midway	Pokharan	Jaisalmer	9.37
21	Resort	Sam	Jaisalmer	7.20
22	Hotel	Susawtan	Jaipur	450.00
23	Hotel	Amer	Jaipur	700.00
24	Resort	Sanganer	Jaipur	203.50
25	Resort	Kot	Jaipur	173.60
26	Resort	Sanganer	Jaipur	250.00
27	Hotel	Jaipur	Jaipur	172.00
28	Hotel	Bicchiwada	Dungarpur	9.96
29	Motel	Nalbadi	Bikaner	5.69
30	Hotel	Rismalsar	Bikaner	77.88
31	Hotel	Nalbadi	Bikaner	5.92
32	Hotel	Bharatpur	Bharatpur	82.72
33	Resort	Behror	Alwar	45.00
34	Resort	Behror	Alwar	52.00
35	Motel	Vana	Ajmer	10.00
36	Amusement Park	Parbatpura	Ajmer	98.00

Appendix 7
Tourist Arrival Forecast: Domestic Tourists

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Jaipur	689001.33	709671.373	730961.515	752890.36	775477.071	790986.612	806806.344	822942.471	839401.321	856189.347	864751.241	873398.753	882132.741	890954.068	899863.609	908862.245	917950.867	927130.376	936401.68	945765.696
Ajmer	1064183.2	1128034.18	1195716.23	1267459.2	1343506.75	1410682.09	1481216.19	1555277	1633040.85	1714692.9	1783280.61	1854611.84	1928796.31	2005948.16	2086186.09	2127909.81	2170468.01	2213877.37	2258154.91	2303318.01
Pushkar	883213.17	945038.089	1011190.76	1081974.11	1157712.3	1215597.91	1276377.81	1340196.7	1407206.53	1477566.86	1521893.86	1567550.68	1614577.2	1663014.52	1712904.95	1747163.05	1782106.31	1817748.44	1854103.41	1891185.47
Bharatpur	111116.08	113338.402	115605.17	117917.273	120275.618	125086.643	130090.109	135293.713	140705.462	146333.68	152187.028	158274.509	164605.489	171189.709	178037.297	185158.789	192565.14	200267.746	208278.456	216609.594
S. Madhopur	71684.841	73835.3866	76050.4482	78331.9616	80681.9205	83909.1973	87265.5652	90756.1878	94386.4353	98161.8927	101106.749	104139.952	107264.151	110482.075	113796.537	116072.468	118393.917	120761.796	123177.032	125640.572
Alwar	80643.744	87095.2435	94062.863	101587.892	109714.923	115200.67	120960.703	127008.738	133359.175	140027.134	145628.219	151453.348	157511.482	163811.941	170364.419	177178.996	184266.155	191636.802	199302.274	207274.365
Sariska	14140.707	16261.8127	18701.0846	21506.2473	24732.1843	27205.4028	29925.9431	32918.5374	36210.3911	39831.4302	41823.0017	43914.1518	46109.8594	48415.3524	50836.12	53377.926	56046.8223	58849.1634	61791.6216	64881.2026
Siliserh	2243.592	2288.46384	2334.23312	2380.91778	2428.53613	2549.96294	2677.46109	2811.33414	2951.90085	3099.49589	3192.48077	3288.25519	3386.90285	3488.50993	3593.16523	3700.96019	3811.98899	3926.34866	4044.13912	4165.4633
Behror	6310.368	6815.19744	7360.41324	7949.24629	8585.186	9014.4453	9465.16756	9938.42594	10435.3472	10957.1146	11285.828	11624.4029	11973.135	12332.329	12702.2989	12956.3449	13215.4718	13479.7812	13749.3768	14024.3644
Jhunjunun	74417.328	80370.7142	86800.3714	93744.4011	101243.953	106306.151	111621.458	117202.531	123062.658	129215.791	133092.264	137085.032	141197.583	145433.511	149796.516	152792.447	155848.295	158965.261	162144.567	165387.458
Sikar	8145.072	8796.67776	9500.41198	10260.4449	11081.2805	11635.3446	12217.1118	12827.9674	13469.3657	14142.834	14567.1191	15004.1326	15454.2566	15917.8843	16395.4208	16723.3293	17057.7958	17398.9518	17746.9308	18101.8694
Kota	73241.43	84227.6445	96861.7912	111391.06	128099.719	140909.691	155000.66	170500.726	187550.798	206305.878	216621.172	227452.231	238824.842	250766.084	263304.389	271203.52	279339.626	287719.815	296351.409	305241.951
Bundi	27159.44	32591.328	39109.5936	46931.5123	56317.8148	64765.487	74480.3101	85652.3566	98500.21	113275.242	124602.766	137063.042	150769.347	165846.281	182430.909	191552.455	201130.077	211186.581	221745.91	232833.206
Jhalawar	179610.71	197571.785	217328.963	239061.859	262968.045	284005.489	306725.928	331264.002	357765.123	386386.332	405705.649	425990.931	447290.478	469655.002	493137.752	507931.885	523169.841	538864.936	555030.884	571681.811
Jodhpur	378180.16	381961.96	385781.579	389639.395	393535.789	401406.505	409434.635	417623.327	425975.794	434495.31	447530.169	460956.074	474784.757	489028.299	503699.148	518810.123	534374.426	550405.659	566917.829	583925.364
Jaisalmer	72193.8	75803.49	79593.6645	83573.3477	87752.0151	91262.0957	94912.5795	98709.0827	102657.446	106763.744	109966.656	113265.656	116663.626	120163.534	123768.44	126243.809	128768.685	131344.059	133970.94	136650.359
Bikaner	200143.52	204146.386	208229.314	212393.9	216641.778	220974.614	225394.106	229901.988	234500.028	239190.029	241581.929	243997.748	246437.726	248902.103	251391.124	253905.035	256444.086	259008.526	261598.612	264214.598
Udaipur	658553.06	665138.591	671789.977	678507.877	685292.956	692145.885	699067.344	706058.018	713118.598	720249.784	727452.282	734726.804	742074.072	749494.813	756989.761	764559.659	772205.255	779927.308	787726.581	795603.847
Nathdwara	404194.7	424404.435	445624.657	467905.89	491301.184	510953.231	531391.361	552647.015	574752.896	597743.012	609697.872	621891.829	634329.666	647016.259	659956.584	666556.15	673221.712	679953.929	686753.468	693621.003
Chittaurgarh	163584.58	165220.428	166872.633	168541.359	170226.773	171929.04	173648.331	175384.814	177138.662	178910.049	180699.149	182506.141	184331.202	186174.514	188036.259	189916.622	191815.788	193733.946	195671.286	197627.998
Banswara	114183.69	121034.716	128296.799	135994.607	144154.284	152803.541	161971.753	171690.058	181991.462	192910.95	202556.497	212684.322	223318.538	234484.465	246208.688	253594.949	261202.797	269038.881	277110.048	285423.349
Rishabdeo	18665.29	19598.5545	20578.4822	21607.4063	22687.7767	23595.2877	24539.0992	25520.6632	26541.4897	27603.1493	28155.2123	28718.3165	29292.6829	29878.5365	30476.1073	30780.8683	31088.677	31399.5638	31713.5594	32030.695
Jaisamand	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Mount Abu	1288812.9	1314589.17	1340880.95	1367698.57	1395052.54	1422953.59	1451412.66	1480440.92	1510049.73	1540250.73	1555653.24	1571209.77	1586921.87	1602791.08	1618819	1635007.19	1651357.26	1667870.83	1684549.54	1701395.03
Ranakpur	59082.684	60264.3377	61469.6244	62699.0169	63952.9973	65232.0572	66536.6984	67867.4323	69224.781	70609.2766	71315.3693	72028.523	72748.8083	73476.2964	74211.0593	74953.1699	75702.7016	76459.7286	77224.3259	77996.5692
Others	823873.76	873306.19	925704.561	981246.835	1040121.64	1123331.38	1213197.89	1310253.72	1415074.02	1528279.94	1681107.93	1849218.72	2034140.6	2237554.65	2461310.12	2756667.33	3087467.41	3457963.5	3872919.13	4337669.42

Appendix 7
Tourist Arrival Forecast: Foreign Tourists

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Jaipur	165179	173437	182109	191215	200776	206799	213003	219393	225975	232754	239736	246929	254336	261967	269825	275222	280726	286341	292068	297909
Ajmer	54333	57593	61049	64712	68594	72024	75625	79406	83377	87546	91047	94689	98477	102416	106513	108643	110816	113032	115293	117598
Pushkar	50406	53430	56636	60034	63636	66818	70159	73667	77350	81218	84466	87845	91359	95013	98814	100790	102806	104862	106959	109098
Bharatpur	11803	12275	12766	13276	13808	14774	15808	16915	18099	19366	20528	21759	23065	24449	25916	26952	28031	29152	30318	31531
S. Madhopur	9554	10700	11984	13423	15033	16236	17535	18938	20453	22089	23193	24353	25571	26849	28191	29037	29908	30806	31730	32682
Alwar	7013	7363	7731	8118	8524	8950	9397	9867	10361	10879	11423	11994	12593	13223	13884	14579	15307	16073	16876	17720
Sariska	12646	15808	19760	24700	30874	35506	40831	46956	54000	62100	67067	72433	78227	84486	91245	94894	98690	102638	106743	111013
Siliserh	228	230	233	235	237	242	247	252	257	262	267	273	278	284	289	295	301	307	313	319
Behror	70	87	109	137	171	188	207	227	250	275	294	315	337	360	386	401	417	434	451	469
Jhunjunun	37264	46580	58226	72782	90977	100075	110083	121091	133200	146520	156776	167751	179493	192058	205502	213722	222271	231162	240408	250024
Sikar	545	682	852	1065	1332	1465	1611	1772	1950	2145	2295	2455	2627	2811	3008	3128	3253	3383	3519	3659
Kota	2196	2635	3162	3794	4553	5100	5712	6397	7165	8024	8666	9360	10109	10917	11791	12380	12999	13649	14332	15048
Bundi	8323	9987	11985	14382	17258	19329	21649	24246	27156	30415	32848	35476	38314	41379	44689	46924	49270	51733	54320	57036
Jhalawar	80	96	115	138	166	186	208	233	261	292	316	341	368	398	430	451	474	497	522	548
Jodhpur	65599	70847	76515	82636	89247	93709	98394	103314	108480	113904	117321	120841	124466	128200	132046	134687	137380	140128	142931	145789
Jaisalmer	54008	58329	62995	68035	73477	79355	85704	92560	99965	107962	113360	119028	124980	131229	137790	141924	146182	150567	155084	159737
Bikaner	30550	33605	36966	40663	44729	47860	51210	54795	58630	62735	65871	69165	72623	76254	80067	82469	84943	87491	90116	92820
Udaipur	74861	78604	82534	86661	90994	94633	98419	102355	106450	110708	115136	119741	124531	129512	134693	137387	140134	142937	145796	148712
Nathdwara	321	337	354	371	390	405	422	439	456	474	493	513	534	555	577	589	600	612	625	637
Chittaurgarh	8564	8992	9441	9913	10409	10825	11258	11709	12177	12664	13171	13698	14246	14815	15408	15716	16030	16351	16678	17012
Banswara	295	304	313	323	332	339	346	353	360	367	374	382	389	397	405	413	421	430	438	447
Rishabdeo	43	44	46	47	48	49	50	51	52	53	54	55	57	58	59	60	61	62	64	65
Jaisamand	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Mount Abu	15054	16108	17236	18442	19733	20523	21343	22197	23085	24009	24729	25471	26235	27022	27832	28389	28957	29536	30127	30729
Ranakpur	23488	25132	26891	28773	30787	32019	33300	34632	36017	37458	38581	39739	40931	42159	43424	44292	45178	46081	47003	47943
Others	14690	15572	16506	17496	18546	20030	21632	23363	25232	27251	30521	34183	38285	42879	48025	55229	63513	73040	83996	96595

DHUDHAR- JAIPUR

		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
(A)	**Est. No of Tourists**																				
	Foreign	165179	173438	182109	191215	200776	206799	213003	219393	225975	232754	239737	246929	254337	261967	269826	275222	280727	286341	292068	297909
	Domestic	689001	709671	730961	752890	775477	790986	806806	822942	839401	856189	864751	873398	882132	890954	899863	908862	917950	927130	936401	945765
	Total	854180	883109	913071	944105	976252	997785	1019809	1042335	1065376	1088943	1104487	1120327	1136469	1152920	1169689	1184084	1198677	1213471	1228469	1243675
	Peak Time Arrivals (% of total)																				
	Foreign	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
	Domestic	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Peak Time Arrivals																				
	Foreign	99107	104063	109266	114729	120465	124079	127802	131636	135585	139652	119868	123464	127168	130983	134913	137611	140363	143171	146034	148955
	Domestic	344500	354836	365481	376445	387738	395493	403403	411471	419700	428094	345900	349359	352853	356381	359945	363545	367180	370852	374560	378306
	Total	443608	458898	474746	491174	508204	519572	531205	543107	555285	567747	465769	472824	480021	487365	494858	501156	507544	514023	520595	527261
(B)	**% of Tourists requiring Hotel Accomodation**																				
	Foreign	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Domestic	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(C)	**Est. No of Tourists requiring Hotel Accomodation**																				
	Foreign	99107	104063	109266	114729	120465	124079	127802	131636	135585	139652	119868	123464	127168	130983	134913	137611	140363	143171	146034	148955
	Domestic	344500	354836	365481	376445	387738	395493	403403	411471	419700	428094	345900	349359	352853	356381	359945	363545	367180	370852	374560	378306
	Total	443608	458898	474746	491174	508204	519572	531205	543107	555285	567747	465769	472824	480021	487365	494858	501156	507544	514023	520595	527261
(D)	**Average Length of Stay (Nights)**																				
	Foreign	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5
	Domestic	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
(E)	**Est. No of Bed-Nights Required**																				
	Foreign	148661	156094	163899	172093	180698	186119	191703	197454	203377	209479	179802	185197	190752	196475	202369	206417	210545	214756	219051	223432
	Domestic	689001	709671	730961	752890	775477	790986	806806	822942	839401	856189	691801	698719	705706	712763	719891	727089	734360	741704	749121	756612
	Total	837662	865765	894860	924983	956175	977105	998509	1020396	1042778	1065668	871603	883915	896458	909238	922260	933506	944905	956460	968172	980044
(F)	**No of Beds per Room**																				
	Foreign	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5
	Domestic	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5
(G)	**Seasonality Factor: No of Season Days per year**																				
	Foreign	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
	Domestic	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
(H)	**No of Rooms Required**																				
	Foreign	1101	1156	1214	1275	1339	1379	1420	1463	1506	1552	1332	1372	1413	1455	1499	1529	1560	1591	1623	1655
	Domestic	3062	3154	3249	3346	3447	3515	3586	3658	3731	3805	3075	3105	3136	3168	3200	3232	3264	3296	3329	3363
	Total	4163	4310	4463	4621	4785	4894	5006	5120	5237	5357	4407	4477	4549	4623	4699	4761	4823	4887	4952	5018
(I)	**Likely Room Split-up By Hotel Category- Foreign Tourists**																				
	Luxury (5/4 Star & Heritage)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Mid-priced (2/3 Star)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Economy (1 Star and Unstarred)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Others (PG, Dharmashala, etc)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(J)	**Likely Room Split-up By Hotel Category - Domestic Tourists**																				
	Luxury (5/4 Star & Heritage)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Mid-priced (2/3 Star)	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
	Economy (1 Star and Unstarred)	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
	Others (PG, Dharmashala, etc)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(K)	**Likely Room Split-up By Hotel Category - Total**																				
	Luxury (5/4 Star & Heritage)	594	620	648	677	708	727	747	768	789	811	840	859	879	899	920	935	950	966	982	998
	Mid-priced (2/3 Star)	1359	1409	1460	1514	1569	1606	1644	1682	1722	1762	1455	1480	1506	1532	1559	1581	1603	1625	1648	1671
	Economy (1 Star and Unstarred)	1696	1750	1806	1864	1924	1965	2006	2048	2091	2135	1737	1758	1780	1802	1825	1845	1866	1887	1908	1930
	Others (PG, Dharmashala, etc)	514	531	548	566	584	596	609	622	635	648	374	379	384	390	395	400	404	409	414	419
	Total	4163	4310	4463	4621	4785	4894	5006	5120	5237	5357	4407	4477	4549	4623	4699	4761	4823	4887	4952	5018
(L)	**Current Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	1392	1392	1392	1392	1392	1392	1392	1392	1392	1392	1392	1392	1392	1392	1392	1392	1392	1392	1392	1392
	Mid-priced (2/3 Star)	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050
	Economy (1 Star and Unstarred)	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000	2000
	Others (PG, Dharmashala, etc)	715	715	715	715	715	715	715	715	715	715	715	715	715	715	715	715	715	715	715	715
	Total	5157	5157	5157	5157	5157	5157	5157	5157	5157	5157	5157	5157	5157	5157	5157	5157	5157	5157	5157	5157
(M)	**Shortfall in Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	-798	-772	-744	-715	-684	-665	-645	-624	-603	-581	-552	-533	-513	-493	-472	-457	-442	-426	-410	-394
	Mid-priced (2/3 Star)	309	359	410	464	519	556	594	632	672	712	405	430	456	482	509	531	553	575	598	621
	Economy (1 Star and Unstarred)	-304	-250	-194	-136	-76	-35	6	48	91	135	-263	-242	-220	-198	-175	-155	-134	-113	-92	-70
	Others (PG, Dharmashala, etc)	-201	-184	-167	-149	-131	-119	-106	-93	-80	-67	-341	-336	-331	-325	-320	-315	-311	-306	-301	-296
	Total	-994	-847	-694	-536	-372	-263	-151	-37	80	200	-750	-680	-608	-534	-458	-396	-334	-270	-205	-139

	BRIJ-MEWAT: ALWAR																				
		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
(A)	**Est. No of Tourists**																				
	Foreign	17635	18517	19443	20415	21436	22508	23633	24815	26055	27358	28726	30162	31670	33254	34917	36663	38496	40420	42441	44564
	Domestic	93924	101438	109553	118317	127782	134171	140880	147924	155320	163086	169609	176394	183450	190788	198419	206356	214610	223194	232122	241407
	Total	111559	119955	128996	138732	149218	156679	164513	172738	181375	190444	198336	206556	215120	224042	233336	243018	253106	263615	274564	285971
	Peak Time Arrivals (% of total)																				
	Foreign	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
	Domestic	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Peak Time Arrivals																				
	Foreign	10581	11110	11666	12249	12861	13505	14180	14889	15633	16415	14363	15081	15835	16627	17458	18331	19248	20210	21221	22282
	Domestic	46962	50719	54776	59158	63891	67086	70440	73962	77660	81543	67844	70558	73380	76315	79368	82542	85844	89278	92849	96563
	Total	57543	61829	66442	71407	76753	80590	84620	88851	93293	97958	82207	85639	89215	92942	96826	100874	105092	109488	114070	118845
(B)	**% of Tourists requiring Hotel Accomodation**																				
	Foreign	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Domestic	50%	50%	50%	50%	50%	55%	55%	55%	55%	55%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%
(C)	**Est. No of Tourists requiring Hotel Accomodation**																				
	Foreign	10581	11110	11666	12249	12861	13505	14180	14889	15633	16415	14363	15081	15835	16627	17458	18331	19248	20210	21221	22282
	Domestic	23481	25359	27388	29579	31946	36897	38742	40679	42713	44849	40706	42335	44028	45789	47621	49525	51506	53567	55709	57938
	Total	34062	36470	39054	41828	44807	50402	52922	55568	58346	61264	55069	57416	59863	62416	65079	67857	70754	73777	76930	80219
(D)	**Average Length of Stay (Nights)**																				
	Foreign	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
	Domestic	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
(E)	**Est. No of Bed-Nights Required**																				
	Foreign	21162	22220	23332	24498	25723	27009	28360	29778	31266	32830	28726	30162	31670	33254	34917	36663	38496	40420	42441	44564
	Domestic	23481	25359	27388	29579	31946	36897	38742	40679	42713	44849	40706	42335	44028	45789	47621	49525	51506	53567	55709	57938
	Total	44643	47580	50720	54077	57669	63906	67102	70457	73979	77678	69432	72497	75698	79043	82537	86188	90002	93987	98151	102501
(F)	**No of Beds per Room**																				
	Foreign	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
	Domestic	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
(G)	**Seasonality Factor: No of Season Days per year**																				
	Foreign	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
	Domestic	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
(H)	**No of Rooms Required**																				
	Foreign	118	123	130	136	143	150	158	165	174	182	160	168	176	185	194	204	214	225	236	248
	Domestic	87	94	101	110	118	137	143	151	158	166	151	157	163	170	176	183	191	198	206	215
	Total	205	217	231	246	261	287	301	316	332	348	310	324	339	354	370	387	405	423	442	462
(I)	**Likely Room Split-up By Hotel Category- Foreign Tourists**																				
	Luxury (5/4 Star & Heritage)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Mid-priced (2/3 Star)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Economy (1 Star and Unstarred)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Others (PG, Dharmashala, etc)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(J)	**Likely Room Split-up By Hotel Category - Domestic Tourists**																				
	Luxury (5/4 Star & Heritage)	10%	10%	10%	10%	10%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
	Mid-priced (2/3 Star)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Economy (1 Star and Unstarred)	40%	40%	40%	40%	40%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
	Others (PG, Dharmashala, etc)	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(K)	**Likely Room Split-up By Hotel Category - Total**																				
	Luxury (5/4 Star & Heritage)	56	59	62	65	69	87	92	96	101	106	94	98	103	108	113	118	124	130	136	142
	Mid-priced (2/3 Star)	82	87	92	98	104	115	120	126	133	139	124	130	136	142	148	155	162	169	177	185
	Economy (1 Star and Unstarred)	52	56	60	64	69	64	67	70	74	77	69	72	75	79	82	86	89	93	97	102
	Others (PG, Dharmashala, etc)	15	16	17	18	19	21	22	23	25	26	23	24	25	26	27	29	30	31	32	34
	Total	205	217	231	246	261	287	301	316	332	348	310	324	339	354	370	387	405	423	442	462
(L)	**Current Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	105	105	105	105	105	105	105	105	105	105	105	105	105	105	105	105	105	105	105	105
	Mid-priced (2/3 Star)	160	160	160	160	160	160	160	160	160	160	160	160	160	160	160	160	160	160	160	160
	Economy (1 Star and Unstarred)	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150
	Others (PG, Dharmashala, etc)	84	84	84	84	84	84	84	84	84	84	84	84	84	84	84	84	84	84	84	84
	Total	499	499	499	499	499	499	499	499	499	499	499	499	499	499	499	499	499	499	499	499
(M)	**Shortfall in Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	-49	-46	-43	-40	-36	-18	-13	-9	-4	1	-11	-7	-2	3	8	13	19	25	31	37
	Mid-priced (2/3 Star)	-78	-73	-68	-62	-56	-45	-40	-34	-27	-21	-36	-30	-24	-18	-12	-5	2	9	17	25
	Economy (1 Star and Unstarred)	-98	-94	-90	-86	-81	-86	-83	-80	-76	-73	-81	-78	-75	-71	-68	-64	-61	-57	-53	-48
	Others (PG, Dharmashala, etc)	-69	-68	-67	-66	-65	-63	-62	-61	-59	-58	-61	-60	-59	-58	-57	-55	-54	-53	-52	-50
	Total	-294	-282	-268	-253	-238	-212	-198	-183	-167	-151	-189	-175	-160	-145	-129	-112	-94	-76	-57	-37

BRIJ-MEWAT: SAWAI MADHOPUR

		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
(A)	**Est. No of Tourists**																				
	Foreign	9554	10700	11984	13423	15033	16236	17535	18938	20453	22089	23193	24353	25571	26849	28191	29037	29908	30806	31730	32682
	Domestic	71685	73835	76050	78332	80682	83909	87266	90756	94386	98162	101107	104140	107264	110482	113797	116072	118394	120762	123177	125641
	Total	81239	84536	88035	91755	95715	100145	104800	109694	114839	120251	124300	128493	132835	137331	141988	145110	148302	151567	154907	158322
	Peak Time Arrivals (% of total)																				
	Foreign	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%
	Domestic	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%
	Peak Time Arrivals																				
	Foreign	7643	8560	9588	10738	12027	12989	14028	15150	16362	17671	18555	19482	20456	21479	22553	23230	23927	24644	25384	26145
	Domestic	46595	47993	49433	50916	52443	54541	56723	58992	61351	63805	65719	67691	69722	71813	73968	75447	76956	78495	80065	81666
	Total	54238	56553	59020	61654	64470	67530	70750	74142	77713	81476	84274	87173	90178	93293	96521	98677	100883	103140	105449	107812
(B)	**% of Tourists requiring Hotel Accomodation**																				
	Foreign	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Domestic	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(C)	**Est. No of Tourists requiring Hotel Accomodation**																				
	Foreign	7643	8560	9588	10738	12027	12989	14028	15150	16362	17671	18555	19482	20456	21479	22553	23230	23927	24644	25384	26145
	Domestic	46595	47993	49433	50916	52443	54541	56723	58992	61351	63805	65719	67691	69722	71813	73968	75447	76956	78495	80065	81666
	Total	54238	56553	59020	61654	64470	67530	70750	74142	77713	81476	84274	87173	90178	93293	96521	98677	100883	103140	105449	107812
(D)	**Average Length of Stay (Nights)**																				
	Foreign	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
	Domestic	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
(E)	**Est. No of Bed-Nights Required**																				
	Foreign	15286	17121	19175	21476	24053	25977	28056	30300	32724	35342	37109	38965	40913	42958	45106	46460	47853	49289	50768	52291
	Domestic	46595	47993	49433	50916	52443	54541	56723	58992	61351	63805	65719	67691	69722	71813	73968	75447	76956	78495	80065	81666
	Total	61881	65114	68608	72392	76496	80518	84778	89292	94075	99147	102829	106656	110635	114772	119074	121907	124809	127784	130833	133957
(F)	**No of Beds per Room**																				
	Foreign	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
	Domestic	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
(G)	**Seasonality Factor: No of Season Days per year**																				
	Foreign	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
	Domestic	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
(H)	**No of Rooms Required**																				
	Foreign	85	95	107	119	134	144	156	168	182	196	206	216	227	239	251	258	266	274	282	291
	Domestic	173	178	183	189	194	202	210	218	227	236	243	251	258	266	274	279	285	291	297	302
	Total	257	273	290	308	328	346	366	387	409	433	450	467	486	505	525	538	551	565	579	593
(I)	**Likely Room Split-up By Hotel Category- Foreign Tourists**																				
	Luxury (5/4 Star & Heritage)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Mid-priced (2/3 Star)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Economy (1 Star and Unstarred)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Others (PG, Dharmashala, etc)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(J)	**Likely Room Split-up By Hotel Category - Domestic Tourists**																				
	Luxury (5/4 Star & Heritage)	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
	Mid-priced (2/3 Star)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Economy (1 Star and Unstarred)	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
	Others (PG, Dharmashala, etc)	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(K)	**Likely Room Split-up By Hotel Category - Total**																				
	Luxury (5/4 Star & Heritage)	68	74	79	85	92	98	104	111	118	126	131	137	143	149	155	159	163	168	172	177
	Mid-priced (2/3 Star)	103	109	116	123	131	139	146	155	164	173	180	187	194	202	210	215	220	226	231	237
	Economy (1 Star and Unstarred)	65	68	71	74	78	82	86	91	95	100	104	108	112	116	120	123	125	128	131	134
	Others (PG, Dharmashala, etc)	22	23	24	25	26	27	29	30	32	33	35	36	37	39	40	41	42	43	44	45
	Total	257	273	290	308	328	346	366	387	409	433	450	467	486	505	525	538	551	565	579	593
(L)	**Current Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70	70
	Mid-priced (2/3 Star)	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40
	Economy (1 Star and Unstarred)	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180
	Others (PG, Dharmashala, etc)	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20
	Total	310	310	310	310	310	310	310	310	310	310	310	310	310	310	310	310	310	310	310	310
(M)	**Shortfall in Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	-2	4	9	15	22	28	34	41	48	56	61	67	73	79	85	89	93	98	102	107
	Mid-priced (2/3 Star)	63	69	76	83	91	99	106	115	124	133	140	147	154	162	170	175	180	186	191	197
	Economy (1 Star and Unstarred)	-115	-112	-109	-106	-102	-98	-94	-89	-85	-80	-76	-72	-68	-64	-60	-57	-55	-52	-49	-46
	Others (PG, Dharmashala, etc)	2	3	4	5	6	7	9	10	12	13	15	16	17	19	20	21	22	23	24	25
	Total	-53	-37	-20	-2	18	36	56	77	99	123	140	157	176	195	215	228	241	255	269	283

MERWARA-MARWAR: AJMER

		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
(A)	**Est. No of Tourists**																				
	Foreign	54333	57593	61049	64712	68594	72024	75625	79406	83377	87546	91047	94689	98477	102416	106513	108643	110816	113032	115293	117598
	Domestic	1064183	1128034	1195716	1267459	1343507	1410682	1481216	1555277	1633041	1714693	1783281	1854612	1928796	2005948	2086186	2127910	2170468	2213877	2258155	2303318
	Total	1118516	1185627	1256765	1332171	1412101	1482706	1556841	1634683	1716418	1802238	1874328	1949301	2027273	2108364	2192699	2236553	2281284	2326909	2373448	2420916
	Peak Time Arrivals (% of total)																				
	Foreign	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Domestic	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Peak Time Arrivals																				
	Foreign	21733	23037	24419	25885	27438	28810	30250	31763	33351	35018	36419	37876	39391	40966	42605	43457	44326	45213	46117	47039
	Domestic	106418	112803	119572	126746	134351	141068	148122	155528	163304	171469	178328	185461	192880	200595	208619	212791	217047	221388	225815	230332
	Total	128152	135841	143991	152631	161788	169878	178372	187290	196655	206488	214747	223337	232270	241561	251224	256248	261373	266601	271933	277371
(B)	**% of Tourists requiring Hotel Accomodation**																				
	Foreign	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Domestic	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
(C)	**Est. No of Tourists requiring Hotel Accomodation**																				
	Foreign	5433	5759	6105	6471	6859	7202	7563	7941	8338	8755	9105	9469	9848	10242	10651	10864	11082	11303	11529	11760
	Domestic	212837	225607	239143	253492	268701	282136	296243	311055	326608	342939	356656	370922	385759	401190	417237	425582	434094	442775	451631	460664
	Total	218270	231366	245248	259963	275561	289339	303806	318996	334946	351693	365761	380391	395607	411431	427888	436446	445175	454079	463160	472423
(D)	**Average Length of Stay (Nights)**																				
	Foreign	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
	Domestic	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
(E)	**Est. No of Bed-Nights Required**																				
	Foreign	5433	5759	6105	6471	6859	7202	7563	7941	8338	8755	9105	9469	9848	10242	10651	10864	11082	11303	11529	11760
	Domestic	212837	225607	239143	253492	268701	282136	296243	311055	326608	342939	356656	370922	385759	401190	417237	425582	434094	442775	451631	460664
	Total	218270	231366	245248	259963	275561	289339	303806	318996	334946	351693	365761	380391	395607	411431	427888	436446	445175	454079	463160	472423
(F)	**No of Beds per Room**																				
	Foreign	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
	Domestic	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0
(G)	**Seasonality Factor: No of Season Days per year**																				
	Foreign	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
	Domestic	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14
(H)	**No of Rooms Required**																				
	Foreign	30	32	34	36	38	40	42	44	46	49	51	53	55	57	59	60	62	63	64	65
	Domestic	3801	4029	4270	4527	4798	5038	5290	5555	5832	6124	6369	6624	6889	7164	7451	7600	7752	7907	8065	8226
	Total	3831	4061	4304	4563	4836	5078	5332	5599	5879	6173	6419	6676	6943	7221	7510	7660	7813	7970	8129	8291
(I)	**Likely Room Split-up By Hotel Category- Foreign Tourists**																				
	Luxury (5/4 Star & Heritage)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Mid-priced (2/3 Star)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Economy (1 Star and Unstarred)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Others (PG, Dharmashala, etc)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(J)	**Likely Room Split-up By Hotel Category - Domestic Tourists**																				
	Luxury (5/4 Star & Heritage)	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%
	Mid-priced (2/3 Star)	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Economy (1 Star and Unstarred)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Others (PG, Dharmashala, etc)	48%	48%	48%	48%	48%	48%	48%	48%	48%	48%	48%	48%	48%	48%	48%	48%	48%	48%	48%	48%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(K)	**Likely Room Split-up By Hotel Category - Total**																				
	Luxury (5/4 Star & Heritage)	88	93	99	105	111	117	123	129	135	142	148	154	160	166	173	176	180	183	187	191
	Mid-priced (2/3 Star)	392	416	441	467	495	520	546	573	602	632	657	683	711	739	769	784	800	816	832	849
	Economy (1 Star and Unstarred)	1525	1616	1713	1816	1925	2021	2122	2228	2340	2457	2555	2657	2764	2874	2989	3049	3110	3172	3236	3300
	Others (PG, Dharmashala, etc)	1826	1935	2051	2175	2305	2420	2541	2668	2802	2942	3060	3182	3309	3442	3579	3651	3724	3798	3874	3952
	Total	3831	4061	4304	4563	4836	5078	5332	5599	5879	6173	6419	6676	6943	7221	7510	7660	7813	7970	8129	8291
(L)	**Current Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Mid-priced (2/3 Star)	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60	60
	Economy (1 Star and Unstarred)	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000
	Others (PG, Dharmashala, etc)	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700	700
	Total	1760	1760	1760	1760	1760	1760	1760	1760	1760	1760	1760	1760	1760	1760	1760	1760	1760	1760	1760	1760
(M)	**Shortfall in Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	88	93	99	105	111	117	123	129	135	142	148	154	160	166	173	176	180	183	187	191
	Mid-priced (2/3 Star)	332	356	381	407	435	460	486	513	542	572	597	623	651	679	709	724	740	756	772	789
	Economy (1 Star and Unstarred)	525	616	713	816	925	1021	1122	1228	1340	1457	1555	1657	1764	1874	1989	2049	2110	2172	2236	2300
	Others (PG, Dharmashala, etc)	1126	1235	1351	1475	1605	1720	1841	1968	2102	2242	2360	2482	2609	2742	2879	2951	3024	3098	3174	3252
	Total	2071	2301	2544	2803	3076	3318	3572	3839	4119	4413	4659	4916	5183	5461	5750	5900	6053	6210	6369	6531

MERWARA-MARWAR: PUSHKAR

		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
(A)	**Est. No of Tourists**																				
	Foreign	50406	53430	56636	60034	63636	66818	70159	73667	77350	81218	84466	87845	91359	95013	98814	100790	102806	104862	106959	109098
	Domestic	883213	945038	1011191	1081974	1157712	1215598	1276378	1340197	1407207	1477567	1521894	1567551	1614577	1663015	1712905	1747163	1782106	1817748	1854103	1891185
	Total	933619	998468	1067827	1142008	1221348	1282416	1346537	1413863	1484557	1558784	1606360	1655396	1705936	1758028	1811719	1847953	1884912	1922610	1961062	2000284
	Peak Time Arrivals (% of total)																				
	Foreign	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
	Domestic	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
	Peak Time Arrivals																				
	Foreign	15122	16029	16991	18010	19091	20045	21048	22100	23205	24365	25340	26353	27408	28504	29644	30237	30842	31459	32088	32729
	Domestic	264964	283511	303357	324592	347314	364679	382913	402059	422162	443270	456568	470265	484373	498904	513871	524149	534632	545325	556231	567356
	Total	280086	299540	320348	342602	366405	384725	403961	424159	445367	467635	481908	496619	511781	527408	543516	554386	565474	576783	588319	600085
(B)	**% of Tourists requiring Hotel Accomodation**																				
	Foreign	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
	Domestic	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
(C)	**Est. No of Tourists requiring Hotel Accomodation**																				
	Foreign	25203	26715	28318	30017	31818	33409	35079	36833	38675	40609	42233	43922	45679	47507	49407	50395	51403	52431	53480	54549
	Domestic	176643	189008	202238	216395	231542	243120	255276	268039	281441	295513	304379	313510	322915	332603	342581	349433	356421	363550	370821	378237
	Total	201846	215723	230556	246412	263361	276529	290355	304873	320116	336122	346612	357433	368595	380109	391988	399828	407824	415981	424300	432786
(D)	**Average Length of Stay (Nights)**																				
	Foreign	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
	Domestic	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
(E)	**Est. No of Bed-Nights Required**																				
	Foreign	50406	53430	56636	60034	63636	66818	70159	73667	77350	81218	84466	87845	91359	95013	98814	100790	102806	104862	106959	109098
	Domestic	176643	189008	202238	216395	231542	243120	255276	268039	281441	295513	304379	313510	322915	332603	342581	349433	356421	363550	370821	378237
	Total	227048	242438	258874	276429	295179	309937	325434	341706	358791	376731	388845	401355	414274	427616	441395	450222	459227	468411	477780	487335
(F)	**No of Beds per Room**																				
	Foreign	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
	Domestic	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0
(G)	**Seasonality Factor: No of Season Days per year**																				
	Foreign	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10	10
	Domestic	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20
(H)	**No of Rooms Required**																				
	Foreign	1680	1781	1888	2001	2121	2227	2339	2456	2578	2707	2816	2928	3045	3167	3294	3360	3427	3495	3565	3637
	Domestic	2208	2363	2528	2705	2894	3039	3191	3350	3518	3694	3805	3919	4036	4158	4282	4368	4455	4544	4635	4728
	Total	3888	4144	4416	4706	5015	5266	5530	5806	6096	6401	6620	6847	7082	7325	7576	7728	7882	8040	8201	8365
(I)	**Likely Room Split-up By Hotel Category- Foreign Tourists**																				
	Luxury (5/4 Star & Heritage)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Mid-priced (2/3 Star)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Economy (1 Star and Unstarred)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Others (PG, Dharmashala, etc)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(J)	**Likely Room Split-up By Hotel Category - Domestic Tourists**																				
	Luxury (5/4 Star & Heritage)	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%	2%
	Mid-priced (2/3 Star)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Economy (1 Star and Unstarred)	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
	Others (PG, Dharmashala, etc)	43%	43%	43%	43%	43%	43%	43%	43%	43%	43%	43%	43%	43%	43%	43%	43%	43%	43%	43%	43%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(K)	**Likely Room Split-up By Hotel Category - Total**																				
	Luxury (5/4 Star & Heritage)	716	760	806	855	906	952	999	1049	1102	1157	1202	1250	1299	1350	1403	1431	1460	1489	1519	1549
	Mid-priced (2/3 Star)	782	831	882	936	993	1043	1095	1150	1207	1268	1316	1367	1420	1475	1532	1562	1594	1625	1658	1691
	Economy (1 Star and Unstarred)	1356	1448	1547	1653	1765	1854	1946	2044	2146	2253	2325	2399	2475	2554	2635	2688	2742	2796	2852	2909
	Others (PG, Dharmashala, etc)	1033	1105	1181	1263	1351	1418	1489	1563	1642	1724	1777	1832	1888	1946	2006	2046	2087	2129	2171	2215
	Total	3888	4144	4416	4706	5015	5266	5530	5806	6096	6401	6620	6847	7082	7325	7576	7728	7882	8040	8201	8365
(L)	**Current Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	640	640	640	640	640	640	640	640	640	640	640	640	640	640	640	640	640	640	640	640
	Mid-priced (2/3 Star)	250	250	250	250	250	250	250	250	250	250	250	250	250	250	250	250	250	250	250	250
	Economy (1 Star and Unstarred)	840	840	840	840	840	840	840	840	840	840	840	840	840	840	840	840	840	840	840	840
	Others (PG, Dharmashala, etc)	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180
	Total	1910	1910	1910	1910	1910	1910	1910	1910	1910	1910	1910	1910	1910	1910	1910	1910	1910	1910	1910	1910
(M)	**Shortfall in Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	76	120	166	215	266	312	359	409	462	517	562	610	659	710	763	791	820	849	879	909
	Mid-priced (2/3 Star)	532	581	632	686	743	793	845	900	957	1018	1066	1117	1170	1225	1282	1312	1344	1375	1408	1441
	Economy (1 Star and Unstarred)	516	608	707	813	925	1014	1106	1204	1306	1413	1485	1559	1635	1714	1795	1848	1902	1956	2012	2069
	Others (PG, Dharmashala, etc)	853	925	1001	1083	1171	1238	1309	1383	1462	1544	1597	1652	1708	1766	1826	1866	1907	1949	1991	2035
	Total	1978	2234	2506	2796	3105	3356	3620	3896	4186	4491	4710	4937	5172	5415	5666	5818	5972	6130	6291	6455

DESERT-JODHPUR

		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
(A)	**Est. No of Tourists**																				
	Foreign	65599	70847	76515	82636	89247	93709	98394	103314	108480	113904	117321	120841	124466	128200	132046	134687	137380	140128	142931	145789
	Domestic	378180	381962	385782	389639	393536	401407	409435	417623	425976	434495	447530	460956	474785	489028	503699	518810	534374	550406	566918	583925
	Total	443779	452809	462296	472275	482782	495115	507829	520937	534456	548399	564851	581797	599250	617228	635745	653497	671755	690534	709848	729714
	Peak Time Arrivals (% of total)																				
	Foreign	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
	Domestic	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Peak Time Arrivals																				
	Foreign	39359	42508	45909	49581	53548	56225	59037	61988	65088	68342	58660	60420	62233	64100	66023	67343	68690	70064	71465	72895
	Domestic	151272	152785	154313	155856	157414	160563	163774	167049	170390	173798	179012	184382	189914	195611	201480	207524	213750	220162	226767	233570
	Total	190631	195293	200221	205437	210962	216788	222810	229038	235478	242140	237673	244803	252147	259711	267503	274867	282440	290226	298232	306465
(B)	**% of Tourists requiring Hotel Accomodation**																				
	Foreign	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Domestic	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(C)	**Est. No of Tourists requiring Hotel Accomodation**																				
	Foreign	39359	42508	45909	49581	53548	56225	59037	61988	65088	68342	58660	60420	62233	64100	66023	67343	68690	70064	71465	72895
	Domestic	151272	152785	154313	155856	157414	160563	163774	167049	170390	173798	179012	184382	189914	195611	201480	207524	213750	220162	226767	233570
	Total	190631	195293	200221	205437	210962	216788	222810	229038	235478	242140	237673	244803	252147	259711	267503	274867	282440	290226	298232	306465
(D)	**Average Length of Stay (Nights)**																				
	Foreign	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
	Domestic	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
(E)	**Est. No of Bed-Nights Required**																				
	Foreign	39359	42508	45909	49581	53548	56225	59037	61988	65088	68342	58660	60420	62233	64100	66023	67343	68690	70064	71465	72895
	Domestic	151272	152785	154313	155856	157414	160563	163774	167049	170390	173798	179012	184382	189914	195611	201480	207524	213750	220162	226767	233570
	Total	190631	195293	200221	205437	210962	216788	222810	229038	235478	242140	237673	244803	252147	259711	267503	274867	282440	290226	298232	306465
(F)	**No of Beds per Room**																				
	Foreign	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5
	Domestic	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5	2.5
(G)	**Seasonality Factor: No of Season Days per year**																				
	Foreign	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
	Domestic	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
(H)	**No of Rooms Required**																				
	Foreign	292	315	340	367	397	416	437	459	482	506	435	448	461	475	489	499	509	519	529	540
	Domestic	672	679	686	693	700	714	728	742	757	772	796	819	844	869	895	922	950	978	1008	1038
	Total	964	994	1026	1060	1096	1130	1165	1202	1239	1279	1230	1267	1305	1344	1385	1421	1459	1497	1537	1578
(I)	**Likely Room Split-up By Hotel Category- Foreign Tourists**																				
	Luxury (5/4 Star & Heritage)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Mid-priced (2/3 Star)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Economy (1 Star and Unstarred)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Others (PG, Dharmashala, etc)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(J)	**Likely Room Split-up By Hotel Category - Domestic Tourists**																				
	Luxury (5/4 Star & Heritage)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Mid-priced (2/3 Star)	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
	Economy (1 Star and Unstarred)	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%
	Others (PG, Dharmashala, etc)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(K)	**Likely Room Split-up By Hotel Category - Total**																				
	Luxury (5/4 Star & Heritage)	150	160	170	182	194	202	211	221	231	241	214	220	227	233	240	246	251	257	262	268
	Mid-priced (2/3 Star)	285	296	307	320	334	345	357	369	382	396	373	384	395	407	419	430	441	452	464	476
	Economy (1 Star and Unstarred)	414	421	428	436	444	455	466	477	489	501	503	518	533	549	566	582	599	616	634	652
	Others (PG, Dharmashala, etc)	115	118	120	122	125	128	131	134	138	141	141	145	150	154	159	163	168	173	178	183
	Total	964	994	1026	1060	1096	1130	1165	1202	1239	1279	1230	1267	1305	1344	1385	1421	1459	1497	1537	1578
(L)	**Current Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	750	750	750	750	750	750	750	750	750	750	750	750	750	750	750	750	750	750	750	750
	Mid-priced (2/3 Star)	350	350	350	350	350	350	350	350	350	350	350	350	350	350	350	350	350	350	350	350
	Economy (1 Star and Unstarred)	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050	1050
	Others (PG, Dharmashala, etc)	360	360	360	360	360	360	360	360	360	360	360	360	360	360	360	360	360	360	360	360
	Total	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510	2510
(M)	**Shortfall in Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	-600	-590	-580	-568	-556	-548	-539	-529	-519	-509	-536	-530	-523	-517	-510	-504	-499	-493	-488	-482
	Mid-priced (2/3 Star)	-65	-54	-43	-30	-16	-5	7	19	32	46	23	34	45	57	69	80	91	102	114	126
	Economy (1 Star and Unstarred)	-636	-629	-622	-614	-606	-595	-584	-573	-561	-549	-547	-532	-517	-501	-484	-468	-451	-434	-416	-398
	Others (PG, Dharmashala, etc)	-245	-242	-240	-238	-235	-232	-229	-226	-222	-219	-219	-215	-210	-206	-201	-197	-192	-187	-182	-177
	Total	-1546	-1516	-1484	-1450	-1414	-1380	-1345	-1308	-1271	-1231	-1280	-1243	-1205	-1166	-1125	-1089	-1051	-1013	-973	-932

DESERT: JAISALMER

		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
(A)	**Est. No of Tourists**																				
	Foreign	54008	58329	62995	68035	73477	79355	85704	92560	99965	107962	113360	119028	124980	131229	137790	141924	146182	150567	155084	159737
	Domestic	72194	75803	79594	83573	87752	91262	94913	98709	102657	106764	109967	113266	116664	120164	123768	126244	128769	131344	133971	136650
	Total	126202	134132	142589	151608	161229	170618	180616	191269	202622	214726	223327	232294	241643	251392	261559	268168	274950	281911	289055	296387
	Peak Time Arrivals (% of total)																				
	Foreign	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
	Domestic	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Peak Time Arrivals																				
	Foreign	32405	34997	37797	40821	44086	47613	51422	55536	59979	64777	56680	59514	62490	65614	68895	70962	73091	75284	77542	79868
	Domestic	28878	30321	31837	33429	35101	36505	37965	39484	41063	42705	43987	45306	46665	48065	49507	50498	51507	52538	53588	54660
	Total	61282	65319	69634	74250	79187	84118	89387	95020	101042	107483	100667	104820	109155	113680	118402	121459	124598	127821	131130	134528
(B)	**% of Tourists requiring Hotel Accomodation**																				
	Foreign	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Domestic	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(C)	**Est. No of Tourists requiring Hotel Accomodation**																				
	Foreign	32405	34997	37797	40821	44086	47613	51422	55536	59979	64777	56680	59514	62490	65614	68895	70962	73091	75284	77542	79868
	Domestic	28878	30321	31837	33429	35101	36505	37965	39484	41063	42705	43987	45306	46665	48065	49507	50498	51507	52538	53588	54660
	Total	61282	65319	69634	74250	79187	84118	89387	95020	101042	107483	100667	104820	109155	113680	118402	121459	124598	127821	131130	134528
(D)	**Average Length of Stay (Nights)**																				
	Foreign	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
	Domestic	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
(E)	**Est. No of Bed-Nights Required**																				
	Foreign	64810	69994	75594	81641	88173	95227	102845	111072	119958	129555	113360	119028	124980	131229	137790	141924	146182	150567	155084	159737
	Domestic	57755	60643	63675	66859	70202	73010	75930	78967	82126	85411	87973	90613	93331	96131	99015	100995	103015	105075	107177	109320
	Total	122565	130637	139269	148500	158374	168236	178775	190040	202084	214966	201334	209641	218311	227360	236805	242919	249197	255642	262261	269057
(F)	**No of Beds per Room**																				
	Foreign	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5
	Domestic	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
(G)	**Seasonality Factor: No of Season Days per year**																				
	Foreign	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
	Domestic	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
(H)	**No of Rooms Required**																				
	Foreign	480	518	560	605	653	705	762	823	889	960	840	882	926	972	1021	1051	1083	1115	1149	1183
	Domestic	214	225	236	248	260	270	281	292	304	316	326	336	346	356	367	374	382	389	397	405
	Total	694	743	796	852	913	976	1043	1115	1193	1276	1166	1217	1271	1328	1387	1425	1464	1504	1546	1588
(I)	**Likely Room Split-up By Hotel Category- Foreign Tourists**																				
	Luxury (5/4 Star & Heritage)	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
	Mid-priced (2/3 Star)	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
	Economy (1 Star and Unstarred)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Others (PG, Dharmashala, etc)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(J)	**Likely Room Split-up By Hotel Category - Domestic Tourists**																				
	Luxury (5/4 Star & Heritage)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Mid-priced (2/3 Star)	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
	Economy (1 Star and Unstarred)	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%
	Others (PG, Dharmashala, etc)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(K)	**Likely Room Split-up By Hotel Category - Total**																				
	Luxury (5/4 Star & Heritage)	155	167	180	194	209	225	243	261	282	304	268	281	295	309	325	334	344	354	364	375
	Mid-priced (2/3 Star)	294	315	339	364	392	420	451	484	520	559	501	525	549	575	602	619	637	655	674	693
	Economy (1 Star and Unstarred)	190	201	214	227	241	255	269	284	301	318	305	317	329	342	355	363	372	381	391	400
	Others (PG, Dharmashala, etc)	56	60	63	67	72	76	80	85	90	95	91	94	98	102	106	109	111	114	117	120
	Total	694	743	796	852	913	976	1043	1115	1193	1276	1166	1217	1271	1328	1387	1425	1464	1504	1546	1588
(L)	**Current Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150
	Mid-priced (2/3 Star)	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480	480
	Economy (1 Star and Unstarred)	640	640	640	640	640	640	640	640	640	640	640	640	640	640	640	640	640	640	640	640
	Others (PG, Dharmashala, etc)	125	125	125	125	125	125	125	125	125	125	125	125	125	125	125	125	125	125	125	125
	Total	1395	1395	1395	1395	1395	1395	1395	1395	1395	1395	1395	1395	1395	1395	1395	1395	1395	1395	1395	1395
(M)	**Shortfall in Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	5	17	30	44	59	75	93	111	132	154	118	131	145	159	175	184	194	204	214	225
	Mid-priced (2/3 Star)	-186	-165	-141	-116	-88	-60	-29	4	40	79	21	45	69	95	122	139	157	175	194	213
	Economy (1 Star and Unstarred)	-450	-439	-426	-413	-399	-385	-371	-356	-339	-322	-335	-323	-311	-298	-285	-277	-268	-259	-249	-240
	Others (PG, Dharmashala, etc)	-69	-65	-62	-58	-53	-49	-45	-40	-35	-30	-34	-31	-27	-23	-19	-16	-14	-11	-8	-5
	Total	-701	-652	-599	-543	-482	-419	-352	-280	-202	-119	-229	-178	-124	-67	-8	30	69	109	151	193

MEWAR: UDAIPUR

		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
(A)	**Est. No of Tourists**																				
	Foreign	74861	78604	82534	86661	90994	94633	98419	102355	106450	110708	115136	119741	124531	129512	134693	137387	140134	142937	145796	148712
	Domestic	658553	665139	671790	678508	685293	692146	699067	706058	713119	720250	727452	734727	742074	749495	756990	764560	772205	779927	787727	795604
	Total	733414	743742	754324	765168	776287	786779	797486	808413	819568	830957	842588	854468	866605	879007	891683	901946	912340	922864	933522	944316
	Peak Time Arrivals (% of total)																				
	Foreign	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%
	Domestic	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
	Peak Time Arrivals																				
	Foreign	44916	47162	49520	51996	54596	56780	59051	61413	63870	66425	69082	71845	74719	77707	80816	82432	84081	85762	87477	89227
	Domestic	197566	199542	201537	203552	205588	207644	209720	211817	213936	216075	218236	220418	222622	224848	227097	229368	231662	233978	236318	238681
	Total	242482	246704	251057	255549	260184	264424	268771	273231	277805	282500	287317	292263	297341	302556	307913	311800	315742	319740	323795	327908
(B)	**% of Tourists requiring Hotel Accomodatior**																				
	Foreign	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Domestic	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(C)	**Est. No of Tourists requiring Hotel Accomodation**																				
	Foreign	44916	47162	49520	51996	54596	56780	59051	61413	63870	66425	69082	71845	74719	77707	80816	82432	84081	85762	87477	89227
	Domestic	197566	199542	201537	203552	205588	207644	209720	211817	213936	216075	218236	220418	222622	224848	227097	229368	231662	233978	236318	238681
	Total	242482	246704	251057	255549	260184	264424	268771	273231	277805	282500	287317	292263	297341	302556	307913	311800	315742	319740	323795	327908
(D)	**Average Length of Stay (Nights)**																				
	Foreign	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
	Domestic	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
(E)	**Est. No of Bed-Nights Required**																				
	Foreign	89833	94324	99041	103993	109192	113560	118102	122827	127740	132849	138163	143690	149437	155415	161631	164864	168161	171524	174955	178454
	Domestic	592698	598625	604611	610657	616764	622931	629161	635452	641807	648225	654707	661254	667867	674545	681291	688104	694985	701935	708954	716043
	Total	682531	692949	703652	714650	725956	736491	747263	758279	769546	781074	792870	804944	817304	829960	842922	852968	863146	873459	883909	894497
(F)	**No of Beds per Room**																				
	Foreign	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5
	Domestic	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
(G)	**Seasonality Factor: No of Season Days per year**																				
	Foreign	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
	Domestic	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90	90
(H)	**No of Rooms Required**																				
	Foreign	665	699	734	770	809	841	875	910	946	984	1023	1064	1107	1151	1197	1221	1246	1271	1296	1322
	Domestic	2195	2217	2239	2262	2284	2307	2330	2354	2377	2401	2425	2449	2474	2498	2523	2549	2574	2600	2626	2652
	Total	2861	2916	2973	3032	3093	3148	3205	3263	3323	3385	3448	3513	3581	3650	3721	3770	3820	3870	3922	3974
(I)	**Likely Room Split-up By Hotel Category- Foreign Tourists**																				
	Luxury (5/4 Star & Heritage)	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%
	Mid-priced (2/3 Star)	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
	Economy (1 Star and Unstarred)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Others (PG, Dharmashala, etc)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(J)	**Likely Room Split-up By Hotel Category - Domestic Tourists**																				
	Luxury (5/4 Star & Heritage)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Mid-priced (2/3 Star)	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
	Economy (1 Star and Unstarred)	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%	55%
	Others (PG, Dharmashala, etc)	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(K)	**Likely Room Split-up By Hotel Category - Total**																				
	Luxury (5/4 Star & Heritage)	695	717	739	763	788	809	831	853	877	901	927	953	980	1008	1037	1054	1071	1089	1107	1125
	Mid-priced (2/3 Star)	605	618	631	645	659	672	685	698	712	726	741	756	771	787	804	815	826	838	849	861
	Economy (1 Star and Unstarred)	1307	1324	1342	1359	1378	1395	1413	1431	1449	1468	1487	1507	1527	1547	1567	1585	1603	1620	1639	1657
	Others (PG, Dharmashala, etc)	253	257	261	265	269	273	277	281	285	289	294	298	303	307	312	316	320	324	327	331
	Total	2861	2916	2973	3032	3093	3148	3205	3263	3323	3385	3448	3513	3581	3650	3721	3770	3820	3870	3922	3974
(L)	**Current Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	780	780	780	780	780	780	780	780	780	780	780	780	780	780	780	780	780	780	780	780
	Mid-priced (2/3 Star)	350	350	350	350	350	350	350	350	350	350	350	350	350	350	350	350	350	350	350	350
	Economy (1 Star and Unstarred)	1890	1890	1890	1890	1890	1890	1890	1890	1890	1890	1890	1890	1890	1890	1890	1890	1890	1890	1890	1890
	Others (PG, Dharmashala, etc)	616	616	616	616	616	616	616	616	616	616	616	616	616	616	616	616	616	616	616	616
	Total	3636	3636	3636	3636	3636	3636	3636	3636	3636	3636	3636	3636	3636	3636	3636	3636	3636	3636	3636	3636
(M)	**Shortfall in Room Availability By Categor**																				
	Luxury (5/4 Star & Heritage)	-85	-63	-41	-17	8	29	51	73	97	121	147	173	200	228	257	274	291	309	327	345
	Mid-priced (2/3 Star)	255	268	281	295	309	322	335	348	362	376	391	406	421	437	454	465	476	488	499	511
	Economy (1 Star and Unstarred)	-583	-566	-548	-531	-512	-495	-477	-459	-441	-422	-403	-383	-363	-343	-323	-305	-287	-270	-251	-233
	Others (PG, Dharmashala, etc)	-363	-359	-355	-351	-347	-343	-339	-335	-331	-327	-322	-318	-313	-309	-304	-300	-296	-292	-289	-285
	Total	-775	-720	-663	-604	-543	-488	-431	-373	-313	-251	-188	-123	-55	14	85	134	184	234	286	338

GODWAR: MOUNT ABU

		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
(A)	**Est. No of Tourists**																				
	Foreign	15054	16108	17236	18442	19733	20523	21343	22197	23085	24009	24729	25471	26235	27022	27832	28389	28957	29536	30127	30729
	Domestic	1288813	1314589	1340881	1367699	1395053	1422954	1451413	1480441	1510050	1540251	1555653	1571210	1586922	1602791	1618819	1635007	1651357	1667871	1684550	1701395
	Total	1303867	1330697	1358117	1386141	1414786	1443476	1472756	1502638	1533135	1564259	1580382	1596680	1613157	1629813	1646651	1663396	1680314	1697407	1714676	1732124
	Peak Time Arrivals (% of total)																				
	Foreign	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Domestic	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Peak Time Arrivals																				
	Foreign	753	805	862	922	987	1026	1067	1110	1154	1200	1236	1274	1312	1351	1392	1419	1448	1477	1506	1536
	Domestic	128881	131459	134088	136770	139505	142295	145141	148044	151005	154025	155565	157121	158692	160279	161882	163501	165136	166787	168455	170140
	Total	129634	132264	134950	137692	140492	143321	146208	149154	152159	155225	156802	158395	160004	161630	163274	164920	166584	168264	169961	171676
(B)	**% of Tourists requiring Hotel Accomodation**																				
	Foreign	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Domestic	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(C)	**Est. No of Tourists requiring Hotel Accomodation**																				
	Foreign	753	805	862	922	987	1026	1067	1110	1154	1200	1236	1274	1312	1351	1392	1419	1448	1477	1506	1536
	Domestic	128881	131459	134088	136770	139505	142295	145141	148044	151005	154025	155565	157121	158692	160279	161882	163501	165136	166787	168455	170140
	Total	129634	132264	134950	137692	140492	143321	146208	149154	152159	155225	156802	158395	160004	161630	163274	164920	166584	168264	169961	171676
(D)	**Average Length of Stay (Nights)**																				
	Foreign	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
	Domestic	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
(E)	**Est. No of Bed-Nights Required**																				
	Foreign	753	805	862	922	987	1026	1067	1110	1154	1200	1236	1274	1312	1351	1392	1419	1448	1477	1506	1536
	Domestic	257763	262918	268176	273540	279011	284591	290283	296088	302010	308050	311131	314242	317384	320558	323764	327001	330271	333574	336910	340279
	Total	258515	263723	269038	274462	279997	285617	291350	297198	303164	309251	312367	315515	318696	321909	325155	328421	331719	335051	338416	341815
(F)	**No of Beds per Room**																				
	Foreign	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
	Domestic	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
(G)	**Seasonality Factor: No of Season Days per year**																				
	Foreign	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20
	Domestic	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20
(H)	**No of Rooms Required**																				
	Foreign	19	20	22	23	25	26	27	28	29	30	31	32	33	34	35	35	36	37	38	38
	Domestic	2578	2629	2682	2735	2790	2846	2903	2961	3020	3081	3111	3142	3174	3206	3238	3270	3303	3336	3369	3403
	Total	2596	2649	2703	2758	2815	2872	2930	2989	3049	3111	3142	3174	3207	3239	3272	3306	3339	3373	3407	3441
(I)	**Likely Room Split-up By Hotel Category- Foreign Tourists**																				
	Luxury (5/4 Star & Heritage)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Mid-priced (2/3 Star)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Economy (1 Star and Unstarred)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Others (PG, Dharmashala, etc)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(J)	**Likely Room Split-up By Hotel Category - Domestic Tourists**																				
	Luxury (5/4 Star & Heritage)	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Mid-priced (2/3 Star)	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
	Economy (1 Star and Unstarred)	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
	Others (PG, Dharmashala, etc)	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(K)	**Likely Room Split-up By Hotel Category - Total**																				
	Luxury (5/4 Star & Heritage)	265	271	277	283	289	295	301	307	314	320	323	327	331	334	338	341	345	348	352	356
	Mid-priced (2/3 Star)	781	797	813	830	847	864	882	899	918	936	946	955	965	975	985	995	1005	1015	1026	1036
	Economy (1 Star and Unstarred)	1292	1318	1344	1371	1399	1427	1455	1485	1514	1545	1560	1576	1592	1608	1624	1640	1657	1673	1690	1707
	Others (PG, Dharmashala, etc)	259	264	269	275	280	286	292	297	303	310	313	316	319	322	326	329	332	335	339	342
	Total	2596	2649	2703	2758	2815	2872	2930	2989	3049	3111	3142	3174	3207	3239	3272	3306	3339	3373	3407	3441
(L)	**Current Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	140	140	140	140	140	140	140	140	140	140	140	140	140	140	140	140	140	140	140	140
	Mid-priced (2/3 Star)	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40
	Economy (1 Star and Unstarred)	1530	1530	1530	1530	1530	1530	1530	1530	1530	1530	1530	1530	1530	1530	1530	1530	1530	1530	1530	1530
	Others (PG, Dharmashala, etc)	315	315	315	315	315	315	315	315	315	315	315	315	315	315	315	315	315	315	315	315
	Total	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025
(M)	**Shortfall in Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	125	131	137	143	149	155	161	167	174	180	183	187	191	194	198	201	205	208	212	216
	Mid-priced (2/3 Star)	741	757	773	790	807	824	842	859	878	896	906	915	925	935	945	955	965	975	986	996
	Economy (1 Star and Unstarred)	-238	-212	-186	-159	-131	-103	-75	-45	-16	15	30	46	62	78	94	110	127	143	160	177
	Others (PG, Dharmashala, etc)	-56	-51	-46	-40	-35	-29	-23	-18	-12	-5	-2	1	4	7	11	14	17	20	24	27
	Total	571	624	678	733	790	847	905	964	1024	1086	1117	1149	1182	1214	1247	1281	1314	1348	1382	1416

HADOTI: KOTA

		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
(A)	**Est. No of Tourists**																				
	Foreign	2196	2635	3162	3794	4553	5100	5712	6397	7165	8024	8666	9360	10109	10917	11791	12380	12999	13649	14332	15048
	Domestic	73241	84228	96862	111391	128100	140910	155001	170501	187551	206306	216621	227452	238825	250766	263304	271204	279340	287720	296351	305242
	Total	75437	86863	100024	115185	132653	146009	160712	176898	194715	214330	225288	236812	248933	261683	275095	283584	292339	301369	310683	320290
(B)	**% of Tourists requiring Hotel Accomodation**																				
	Foreign	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Domestic	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(C)	**Est. No of Tourists requiring Hotel Accomodation**																				
	Foreign	2196	2635	3162	3794	4553	5100	5712	6397	7165	8024	8666	9360	10109	10917	11791	12380	12999	13649	14332	15048
	Domestic	73241	84228	96862	111391	128100	140910	155001	170501	187551	206306	216621	227452	238825	250766	263304	271204	279340	287720	296351	305242
	Total	75437	86863	100024	115185	132653	146009	160712	176898	194715	214330	225288	236812	248933	261683	275095	283584	292339	301369	310683	320290
(D)	**Average Length of Stay (Nights)**																				
	Foreign	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
	Domestic	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
(E)	**Est. No of Bed-Nights Required**																				
	Foreign	4392	5270	6324	7589	9107	10199	11423	12794	14329	16049	17333	18719	20217	21834	23581	24760	25998	27298	28663	30096
	Domestic	146483	168455	193724	222782	256199	281819	310001	341001	375102	412612	433242	454904	477650	501532	526609	542407	558679	575440	592703	610484
	Total	150875	173725	200048	230371	265306	292019	321425	353796	389431	428661	450575	473624	497867	523367	550190	567167	584677	602738	621366	640580
(F)	**No of Beds per Room**																				
	Foreign	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5
	Domestic	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
(G)	**Seasonality Factor: No of Season Days per year**																				
	Foreign	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180	180
	Domestic	250	250	250	250	250	250	250	250	250	250	250	250	250	250	250	250	250	250	250	250
(H)	**No of Rooms Required**																				
	Foreign	16	20	23	28	34	38	42	47	53	59	64	69	75	81	87	92	96	101	106	111
	Domestic	195	225	258	297	342	376	413	455	500	550	578	607	637	669	702	723	745	767	790	814
	Total	212	244	282	325	375	414	456	502	553	610	642	676	712	750	789	815	841	868	896	925
(I)	**Likely Room Split-up By Hotel Category- Foreign Tourists**																				
	Luxury (5/4 Star & Heritage)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Mid-priced (2/3 Star)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Economy (1 Star and Unstarred)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Others (PG, Dharmashala, etc)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(J)	**Likely Room Split-up By Hotel Category - Domestic Tourists**																				
	Luxury (5/4 Star & Heritage)	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Mid-priced (2/3 Star)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Economy (1 Star and Unstarred)	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%	45%
	Others (PG, Dharmashala, etc)	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(K)	**Likely Room Split-up By Hotel Category - Total**																				
	Luxury (5/4 Star & Heritage)	26	30	35	41	48	53	58	64	71	79	83	88	94	99	105	109	113	117	121	126
	Mid-priced (2/3 Star)	36	41	48	56	65	71	79	87	96	106	112	119	125	133	140	145	150	156	161	167
	Economy (1 Star and Unstarred)	90	104	120	138	159	175	192	212	233	256	270	283	298	313	329	339	350	360	372	383
	Others (PG, Dharmashala, etc)	59	68	79	91	104	115	126	139	153	168	177	185	195	205	215	222	228	235	242	250
	Total	212	244	282	325	375	414	456	502	553	610	642	676	712	750	789	815	841	868	896	925
(L)	**Current Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240
	Mid-priced (2/3 Star)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Economy (1 Star and Unstarred)	120	120	120	120	120	120	120	120	120	120	120	120	120	120	120	120	120	120	120	120
	Others (PG, Dharmashala, etc)	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
	Total	460	460	460	460	460	460	460	460	460	460	460	460	460	460	460	460	460	460	460	460
(M)	**Shortfall in Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	-214	-210	-205	-199	-192	-187	-182	-176	-169	-161	-157	-152	-146	-141	-135	-131	-127	-123	-119	-114
	Mid-priced (2/3 Star)	36	41	48	56	65	71	79	87	96	106	112	119	125	133	140	145	150	156	161	167
	Economy (1 Star and Unstarred)	-30	-16	0	18	39	55	72	92	113	136	150	163	178	193	209	219	230	240	252	263
	Others (PG, Dharmashala, etc)	-41	-32	-21	-9	4	15	26	39	53	68	77	85	95	105	115	122	128	135	142	150
	Total	-248	-216	-178	-135	-85	-46	-4	42	93	150	182	216	252	290	329	355	381	408	436	465

	SHEKHAWATI: JHUNJHUNUN																				
		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
(A)	**Est. No of Tourists**																				
	Foreign	37810	47262	59078	73847	92309	101540	111694	122863	135150	148665	159071	170206	182120	194869	208510	216850	225524	234545	243927	253684
	Domestic	82562	89167	96301	104005	112325	117941	123839	130030	136532	143359	147659	152089	156652	161351	166192	169516	172906	176364	179891	183489
	Total	120372	136430	155379	177852	204634	219481	235532	252894	271682	292023	306730	322295	338772	356220	374702	386366	398430	410909	423818	437173
(B)	**% of Tourists requiring Hotel Accomodation**																				
	Foreign	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
	Domestic	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
(C)	**Est. No of Tourists requiring Hotel Accomodation**																				
	Foreign	37810	47262	59078	73847	92309	101540	111694	122863	135150	148665	159071	170206	182120	194869	208510	216850	225524	234545	243927	253684
	Domestic	24769	26750	28890	31201	33698	35382	37152	39009	40960	43008	44298	45627	46996	48405	49858	50855	51872	52909	53967	55047
	Total	62578	74012	87968	105049	126007	136922	148845	161872	176109	191672	203369	215833	229116	243274	258367	267705	277396	287454	297894	308731
(D)	**Average Length of Stay (Nights)**																				
	Foreign	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
	Domestic	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
(E)	**Est. No of Bed-Nights Required**																				
	Foreign	37810	47262	59078	73847	92309	101540	111694	122863	135150	148665	159071	170206	182120	194869	208510	216850	225524	234545	243927	253684
	Domestic	24769	26750	28890	31201	33698	35382	37152	39009	40960	43008	44298	45627	46996	48405	49858	50855	51872	52909	53967	55047
	Total	62578	74012	87968	105049	126007	136922	148845	161872	176109	191672	203369	215833	229116	243274	258367	267705	277396	287454	297894	308731
(F)	**No of Beds per Room**																				
	Foreign	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
	Domestic	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0
(G)	**Seasonality Factor: No of Season Days per year**																				
	Foreign	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240
	Domestic	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240	240
(H)	**No of Rooms Required**																				
	Foreign	79	98	123	154	192	212	233	256	282	310	331	355	379	406	434	452	470	489	508	529
	Domestic	52	56	60	65	70	74	77	81	85	90	92	95	98	101	104	106	108	110	112	115
	Total	130	154	183	219	263	285	310	337	367	399	424	450	477	507	538	558	578	599	621	643
(I)	**Likely Room Split-up By Hotel Category- Foreign Tourists**																				
	Luxury (5/4 Star & Heritage)	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%
	Mid-priced (2/3 Star)	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
	Economy (1 Star and Unstarred)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Others (PG, Dharmashala, etc)	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(J)	**Likely Room Split-up By Hotel Category - Domestic Tourists**																				
	Luxury (5/4 Star & Heritage)	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
	Mid-priced (2/3 Star)	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
	Economy (1 Star and Unstarred)	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
	Others (PG, Dharmashala, etc)	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
(K)	**Likely Room Split-up By Hotel Category - Total**																				
	Luxury (5/4 Star & Heritage)	58	70	86	105	129	142	155	170	186	204	217	232	247	264	281	292	304	315	327	340
	Mid-priced (2/3 Star)	39	46	55	66	79	86	93	101	110	120	127	135	143	152	161	167	173	180	186	193
	Economy (1 Star and Unstarred)	25	27	30	34	38	40	43	45	48	51	53	56	58	61	63	65	67	69	70	72
	Others (PG, Dharmashala, etc)	9	10	12	14	17	18	19	21	23	24	26	27	29	30	32	33	34	35	37	38
	Total	130	154	183	219	263	285	310	337	367	399	424	450	477	507	538	558	578	599	621	643
(L)	**Current Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	429	429	429	429	429	429	429	429	429	429	429	429	429	429	429	429	429	429	429	429
	Mid-priced (2/3 Star)	45	45	45	45	45	45	45	45	45	45	45	45	45	45	45	45	45	45	45	45
	Economy (1 Star and Unstarred)	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150	150
	Others (PG, Dharmashala, etc)	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20	20
	Total	644	644	644	644	644	644	644	644	644	644	644	644	644	644	644	644	644	644	644	644
(M)	**Shortfall in Room Availability By Category**																				
	Luxury (5/4 Star & Heritage)	-371	-359	-343	-324	-300	-287	-274	-259	-243	-225	-212	-197	-182	-165	-148	-137	-125	-114	-102	-89
	Mid-priced (2/3 Star)	-6	1	10	21	34	41	48	56	65	75	82	90	98	107	116	122	128	135	141	148
	Economy (1 Star and Unstarred)	-125	-123	-120	-116	-112	-110	-107	-105	-102	-99	-97	-94	-92	-89	-87	-85	-83	-81	-80	-78
	Others (PG, Dharmashala, etc)	-11	-10	-8	-6	-3	-2	-1	1	3	4	6	7	9	10	12	13	14	15	17	18
	Total	-514	-490	-461	-425	-381	-359	-334	-307	-277	-245	-220	-194	-167	-137	-106	-86	-66	-45	-23	-1

Appendix 9

Employment Generation: Assumptions

1) To arrive at the no of ‘distinct’ tourists only the relevant destinations/ hubs of domestic tourist activity are considered
2) The average length of stay is expected to increase for these destinations/ circuits in the future
3) The average tourist expenditure per day is also expected to increase in the future due to introduction of more spending opportunities at each destination/ circuit
4) Employment Output Ratio and Employment Multiplier are taken from the Ministry of Tourism, Govt. of India Report on ‘Economic Impact of Tourism in India’

Appendix 9

Employment Generation: Domestic Traffic

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Jaipur	689001	709671	730962	752890	775477	790987	806806	822942	839401	856189	864751	873399	882133	890954	899864	908862	917951	927130	936402	945766
Ajmer	1064183	1128034	1195716	1267459	1343507	1410682	1481216	1555277	1633041	1714693	1783281	1854612	1928796	2005948	2086186	2127910	2170468	2213877	2258155	2303318
Pushkar	883213	945038	1011191	1081974	1157712	1215598	1276378	1340197	1407207	1477567	1521894	1567551	1614577	1663015	1712905	1747163	1782106	1817748	1854103	1891185
Bharatpur	111116	113338	115605	117917	120276	125087	130090	135294	140705	146334	152187	158275	164605	171190	178037	185159	192565	200268	208278	216610
S. Madhopur	71685	73835	76050	78332	80682	83909	87266	90756	94386	98162	101107	104140	107264	110482	113797	116072	118394	120762	123177	125641
Alwar	80644	87095	94063	101588	109715	115201	120961	127009	133359	140027	145628	151453	157511	163812	170364	177179	184266	191637	199302	207274
Sariska	14141	16262	18701	21506	24732	27205	29926	32919	36210	39831	41823	43914	46110	48415	50836	53378	56047	58849	61792	64881
Siliserh	2244	2288	2334	2381	2429	2550	2677	2811	2952	3099	3192	3288	3387	3489	3593	3701	3812	3926	4044	4165
Bundi	27159	32591	39110	46932	56318	64765	74480	85652	98500	113275	124603	137063	150769	165846	182431	191552	201130	211187	221746	232833
Banswara	114184	121035	128297	135995	144154	152804	161972	171690	181991	192911	202556	212684	223319	234484	246209	253595	261203	269039	277110	285423
Mount Abu	1288813	1314589	1340881	1367699	1395053	1422954	1451413	1480441	1510050	1540251	1555653	1571210	1586922	1602791	1618819	1635007	1651357	1667871	1684550	1701395
Ranakpur	59083	60264	61470	62699	63953	65232	66537	67867	69225	70609	71315	72029	72749	73476	74211	74953	75703	76460	77224	77997
Incremental Traffic																				
Ajmer		63851	67682	71743	76048	67175	70534	74061	77764	81652	68588	71331	74184	77152	80238	41724	42558	43409	44278	45163
Pushkar		61825	66153	70783	75738	57886	60780	63819	67010	70360	44327	45657	47027	48437	49890	34258	34943	35642	36355	37082
Bharatpur		2222	2267	2312	2358	4811	5003	5204	5412	5628	5853	6087	6331	6584	6848	7121	7406	7703	8011	8331
S. Madhopur		2151	2215	2282	2350	3227	3356	3491	3630	3775	2945	3033	3124	3218	3314	2276	2321	2368	2415	2464
Alwar		6451	6968	7525	8127	5486	5760	6048	6350	6668	5601	5825	6058	6300	6552	6815	7087	7371	7665	7972
Sariska		2121	2439	2805	3226	2473	2721	2993	3292	3621	1992	2091	2196	2305	2421	2542	2669	2802	2942	3090
Siliserh		45	46	47	48	121	127	134	141	148	93	96	99	102	105	108	111	114	118	121
Bundi		5432	6518	7822	9386	8448	9715	11172	12848	14775	11328	12460	13706	15077	16585	9122	9578	10057	10559	11087
Banswara		6851	7262	7698	8160	8649	9168	9718	10301	10919	9646	10128	10634	11166	11724	7386	7608	7836	8071	8313
Mount Abu		25776	26292	26818	27354	27901	28459	29028	29609	30201	15403	15557	15712	15869	16028	16188	16350	16514	16679	16845
Ranakpur	-2452	1182	1205	1229	1254	1279	1305	1331	1357	1384	706	713	720	727	735	742	750	757	765	772
Ajmer		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
S. Madhopur																				
Alwar																				
Sariska		1	1	1	1.5	1.5	1.5	1.5	1.5	1.5	2	2	2	2	2	2	2	2	2	2
Siliserh																				
Bundi																				
Udaipur		2	2	2	2	2	2	2	2	3	3	3	3	3	3	3	3	3	3	3
Banswara																				
Mount Abu		2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
Ranakpur																				
Jaipur	750	758	765	773	788	804	820	836	853	870	892	914	937	961	985	1009	1034	1060	1087	1114
Bharatpur																				
Alwar																				
Sariska	400	404	408	412	420	429	437	446	455	464	476	488	500	512	525	538	552	565	580	594
Siliserh																				
Bundi																				
Udaipur	750	758	765	773	788	804	820	836	853	870	892	914	937	961	985	1009	1034	1060	1087	1114
Banswara																				
Mount Abu	750	758	765	773	788	804	820	836	853	870	892	914	937	961	985	1009	1034	1060	1087	1114
Ranakpur																				
Jaipur		31	33	34	36	25	26	27	28	44	23	24	25	25	26	27	28	29	30	31
Bharatpur		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
S. Madhopur		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Alwar		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sariska		1	1	1	2	2	2	2	2	3	2	2	2	2	3	3	3	3	3	4
Siliserh		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Bundi		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Udaipur		10	10	10	11	11	11	12	12	19	19	20	21	21	22	23	24	25	25	26
Banswara		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Mount Abu		39	40	41	43	45	47	49	51	53	27	28	29	30	32	33	34	35	36	38
Ranakpur		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Direct Employment		6350	6595	6851	7627	7448	7807	8186	8587	11183	8716	9139	9584	10053	10546	9972	10421	10891	11384	11901
Total Employment		14542	15102	15688	17467	17056	17877	18745	19664	25609	19960	20929	21948	23021	24151	22835	23864	24941	26070	27253

Appendix 9
Employment Generation : Foreign Traffic

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	
Jaipur	165179	173437	182109	191215	200776	206799	213003	219393	225975	232754	239736	246929	254336	261967	269825	275222	280726	286341	292068	297909	
S. Madhopur	9554	10700	11984	13423	15033	16236	17535	18938	20453	22089	23193	24353	25571	26849	28191	29037	29908	30806	31730	32682	
Sariska	12646	15808	19760	24700	30874	35506	40831	46956	54000	62100	67067	72433	78227	84486	91245	94894	98690	102638	106743	111013	
Kota	2196	2635	3162	3794	4553	5100	5712	6397	7165	8024	8666	9360	10109	10917	11791	12380	12999	13649	14332	15048	
Jodhpur	65599	70847	76515	82636	89247	93709	98394	103314	108480	113904	117321	120841	124466	128200	132046	134687	137380	140128	142931	145789	
Udaipur	74861	78604	82534	86661	90994	94633	98419	102355	106450	110708	115136	119741	124531	129512	134693	137387	140134	142937	145796	148712	
Total	**647112**	**698778**	**756513**	**821370**	**894632**	**947439**	**1004153**	**1065128**	**1130755**	**1201467**	**1258536**	**1318787**	**1382430**	**1449689**	**1520807**	**1568572**	**1618670**	**1671305**	**1726709**	**1785142**	
					8.0%					**7.0%**										**5.5%**	
Incremental Traffic																					
	2002	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	
Jaipur		8259	8672	9105	9561	6023	6204	6390	6582	6779	6983	7192	7408	7630	7859	5397	5504	5615	5727	5841	
S. Madhopur		1146	1284	1438	1611	1203	1299	1403	1515	1636	1104	1160	1218	1279	1342	846	871	897	924	952	
Sariska		3162	3952	4940	6175	4631	5326	6125	7043	8100	4968	5365	5795	6258	6759	3650	3796	3948	4106	4270	
Kota		439	527	632	759	546	612	685	768	860	642	693	749	809	873	590	619	650	682	717	
Jodhpur		5248	5668	6121	6611	4462	4685	4920	5166	5424	3417	3520	3625	3734	3846	2641	2694	2748	2803	2859	
Udaipur		3743	3930	4127	4333	3640	3785	3937	4094	4258	4428	4605	4790	4981	5180	2694	2748	2803	2859	2916	
Average Length of Stay in a circuit/ destination																					
Jaipur	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	1.5	3	3	3	3	3	3	3	3	3	3	3	
S. Madhopur	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	
Sariska	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	
Kota					1	1	1	1	1	2	2	2	2	2	2	2	2	2	2	2	
Jodhpur	3	3	3	3	4	4	4	4	4	5	5	5	5	5	5	5	5	5	5	5	
Udaipur	2	2	2	2	2	2	2	2	2	3	3	3	3	3	3	3	3	3	3	3	
Average Spend per Day in the circuit/ destination																					
Jaipur	1500	1515	1530	1545	1576	1608	1640	1673	1706	1740	1784	1829	1874	1921	1969	2018	2069	2121	2174	2228	
S. Madhopur	1000	1010	1020	1030	1051	1072	1093	1115	1138	1160	1189	1219	1250	1281	1313	1346	1379	1414	1449	1485	
Sariska	1000	1010	1020	1030	1051	1072	1093	1115	1138	1160	1189	1219	1250	1281	1313	1346	1379	1414	1449	1485	
Kota	0	0	0	0	800	816	832	849	866	883	905	928	951	975	999	1024	1050	1076	1103	1131	
Jodhpur	1500	1515	1530	1545	1576	1608	1640	1673	1706	1740	1784	1829	1874	1921	1969	2018	2069	2121	2174	2228	
Udaipur	1000	1010	1020	1030	1051	1072	1093	1115	1138	1160	1189	1219	1250	1281	1313	1346	1379	1414	1449	1485	
Incremental Tourist Spend																					
Jaipur		19	20	21	23	15	15	16	17	35	37	39	42	44	46	33	34	36	37	39	
S. Madhopur		2	3	3	3	3	3	3	3	4	3	3	3	3	4	2	2	3	3	3	
Sariska		6	8	10	13	10	12	14	16	19	12	13	14	16	18	10	10	11	12	13	
Kota		0	0	0	1	0	1	1	1	2	1	1	1	2	2	1	1	1	2	2	
Jodhpur		24	26	28	42	29	31	33	35	47	30	32	34	36	38	27	28	29	30	32	
Udaipur		8	8	9	9	8	8	9	9	15	16	17	18	19	20	11	11	12	12	13	
Total Incremental Tourist Spend		59	65	71	90	64	69	75	82	122	99	106	113	120	128	84	88	92	96	101	1722
Employment/ Output Ratio	Employment/ Rs. 1 Mn Tourist Spend	71.1618																			**Cumulative**
Direct Employment		4190	4599	5062	6431	4553	4930	5345	5803	8648	7063	7520	8008	8530	9088	5943	6232	6535	6854	7188	122520
Employment Multiplier		2.435																			
Total Employment		10203	11198	12326	15659	11087	12004	13014	14131	21059	17199	18310	19499	20770	22130	14470	15174	15913	16688	17503	298336