

# Indian Tourism Vision 2047

## \$3 Trillion - Making India a tourism driven economy

Chintan Shivir, Tourism in Mission Mode

28th March 2023 – 29th March 2023

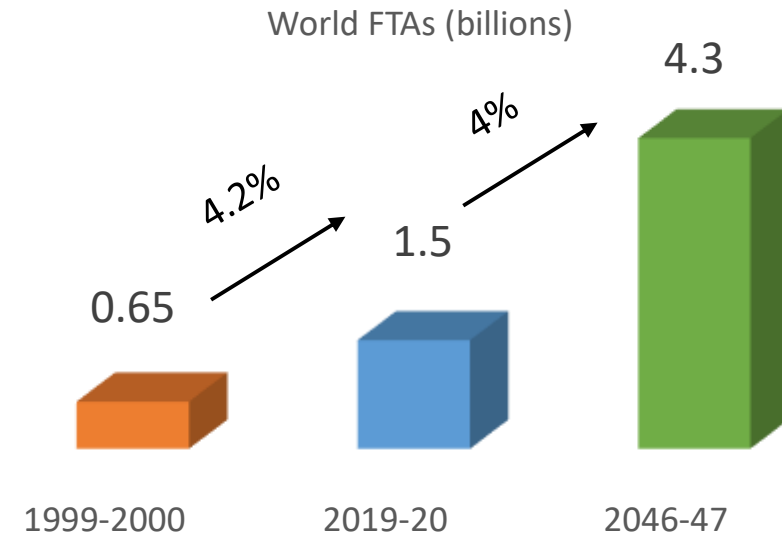
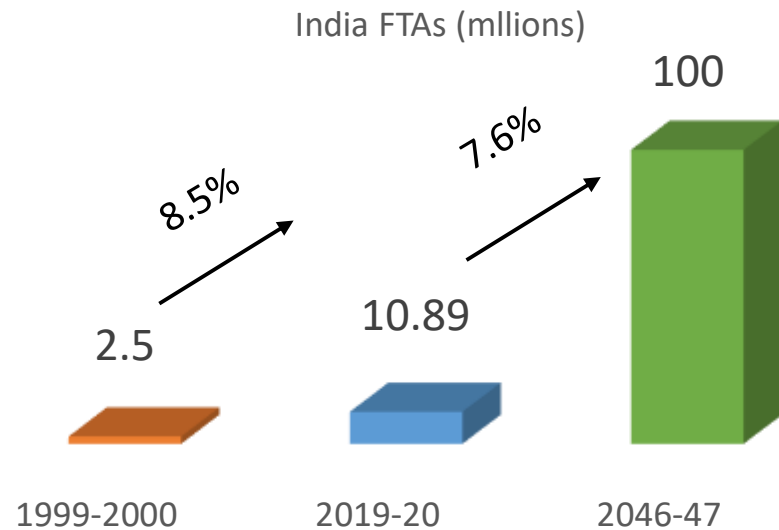


**- *Targets***

**- *Outcome***

**- *Enablers***

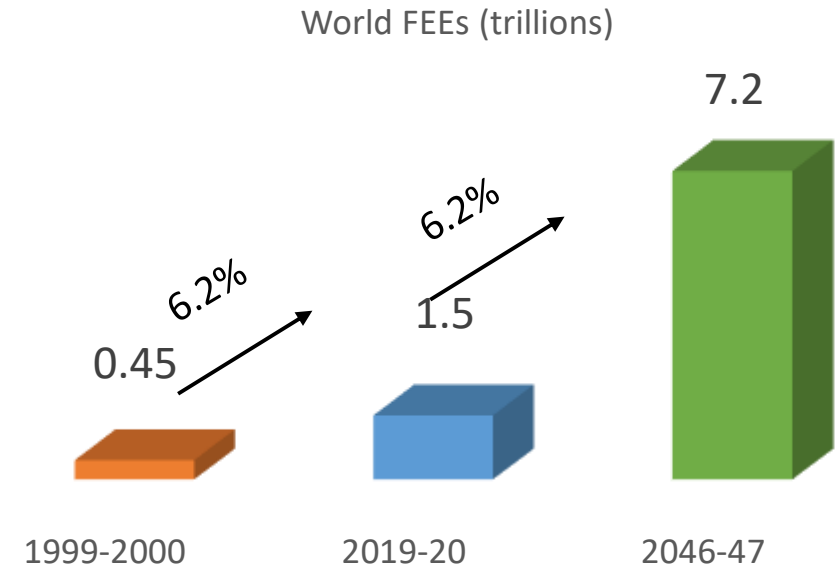
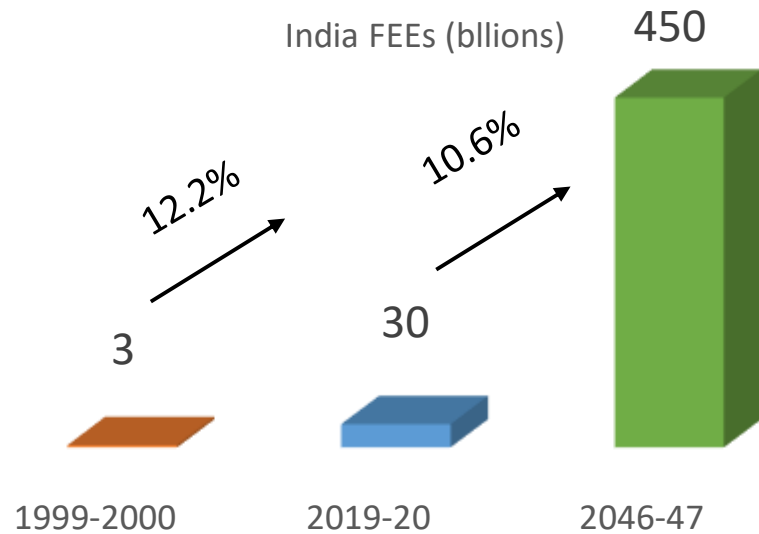
# Going for the century with foreign tourists



- India's share up from 0.37% to 1% to 2%+
- Target country-focused marketing; Segment driven destinations in states; Competitive global taxation; travel trade support
- ~ 150 mn on an optimistic scenario



# Increase tourism foreign exchange

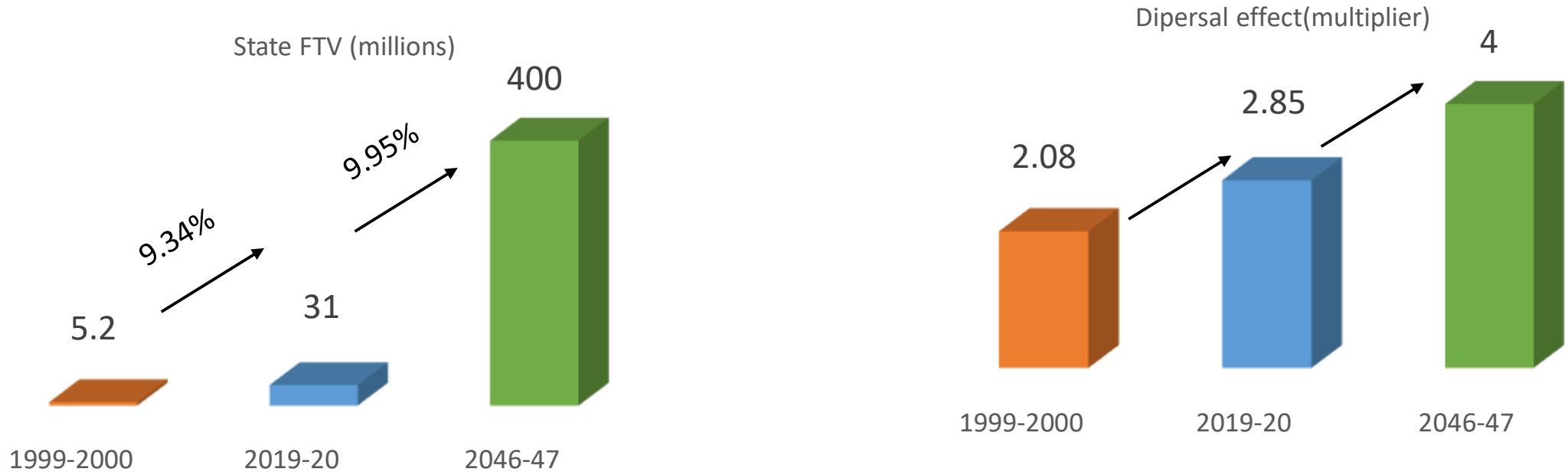


- PM's target - increase average spend from ~ \$ 2700 - \$ 4500
- Sustainable & premium tourism destinations – strategic differentiation
- Enhance unique Indian experiences
- India's share up from 0.67% to 2% to 6.25%
- Optimistic scenario - \$ 600 bn



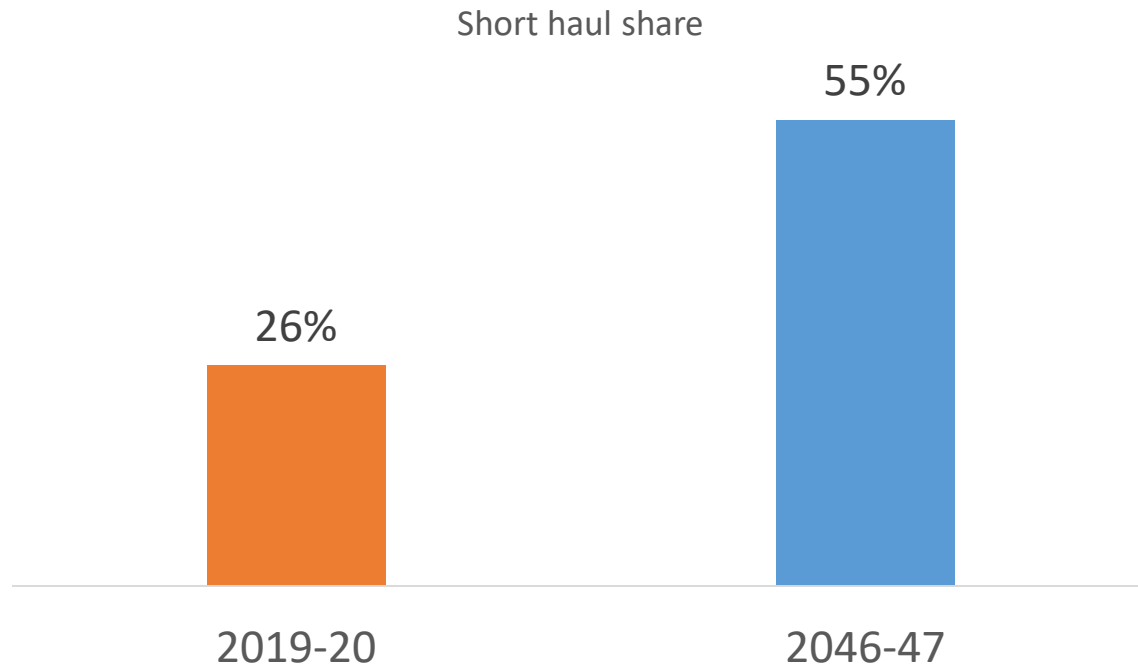
Federation of Associations in  
Indian Tourism & Hospitality

# Enhance states' foreign tourists footprint



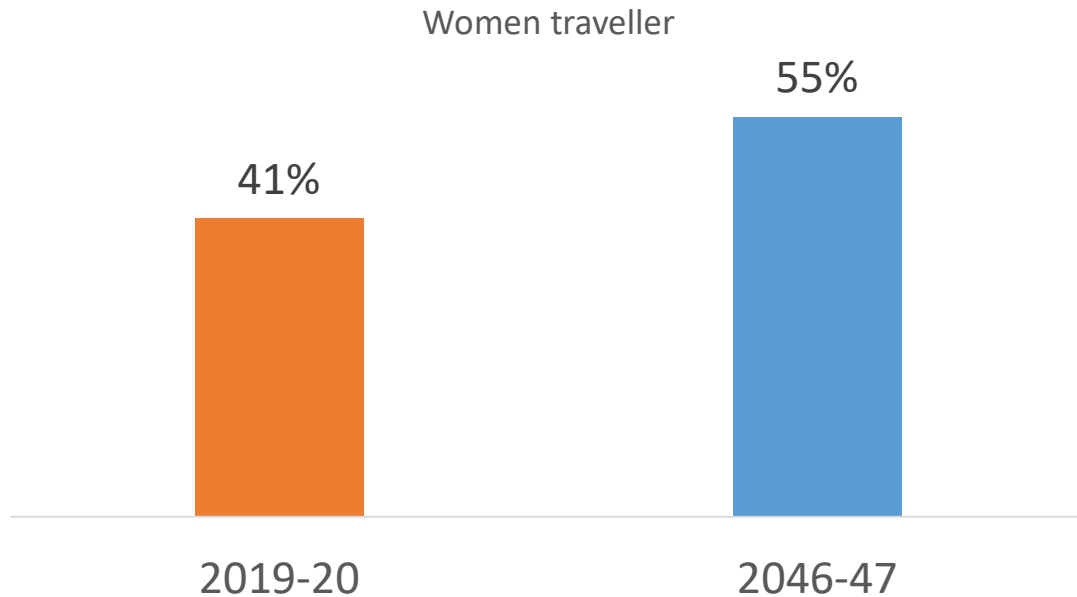
- Joint states marketing – synergies; inter state circuit development; national tourism transportation policy ; destinations development on convergence mode
- Optimistic scenario – 600 mn

# Increase regional travel



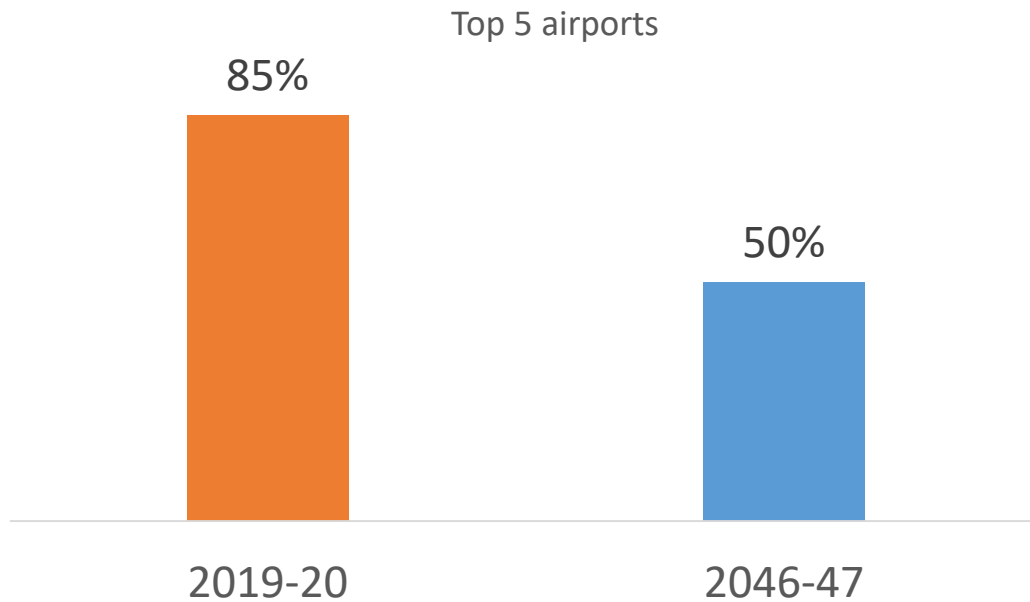
- Short haul (excl Bangladesh) to increase: South Asia, South East Asia, West Asia
- Global trend
- Regional Marketing
- Impulse long weekends purchase
- More frequent travel
- Derisk during global crisis

# Create India for 'women tourists' positioning



- Target solo women traveller
- Great for women, so great for families, LGBT+
- Safe, secure destinations
- 24-hour tourism zones

# Create international access across most states

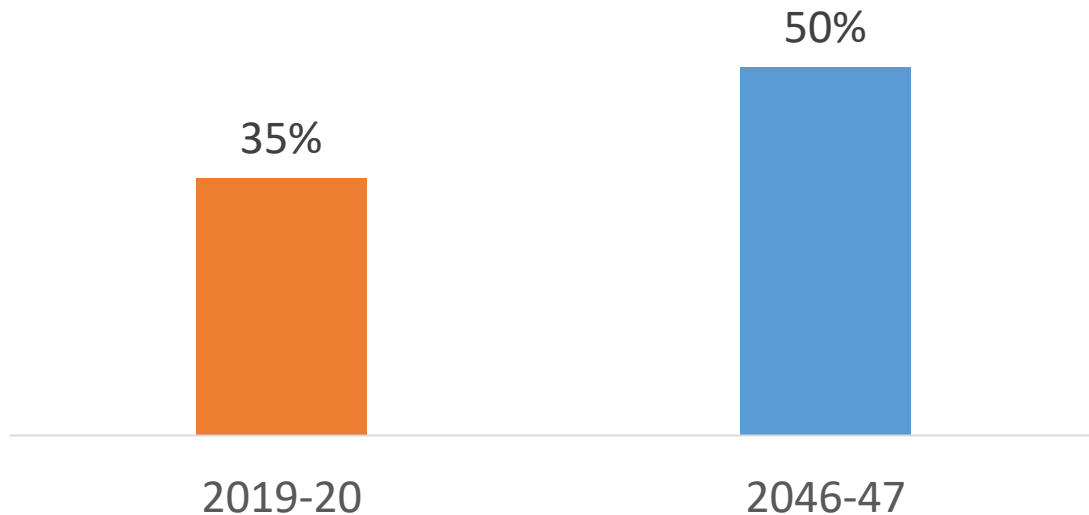


- More international linkages across states
- More unique tourism experiences with a 360 degree access of India
- Greater & faster regional tourists outreach



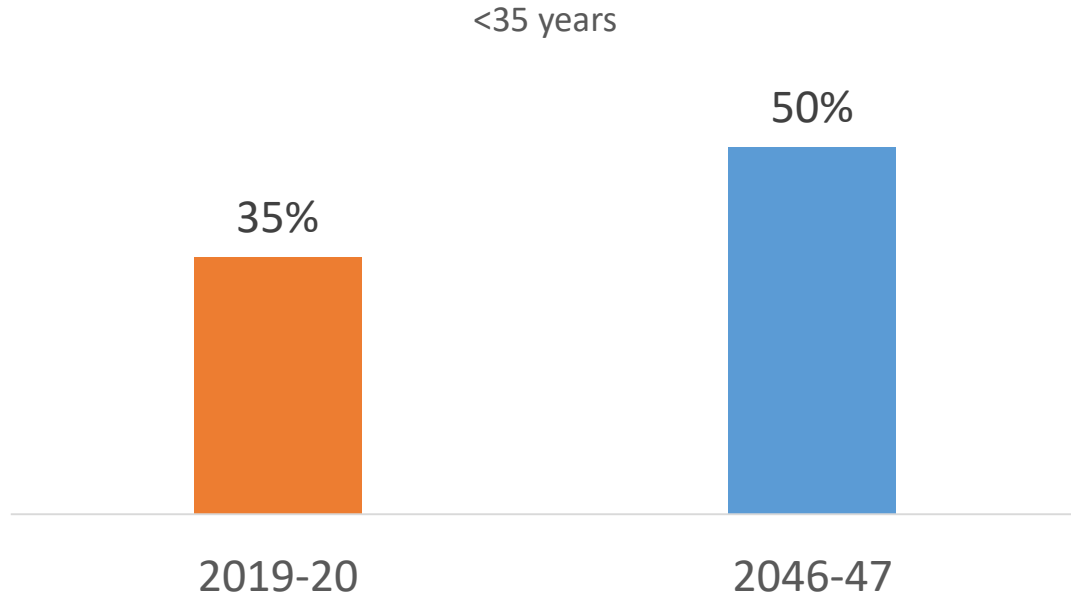
# Make India a 365 day destination

Off seasons' share



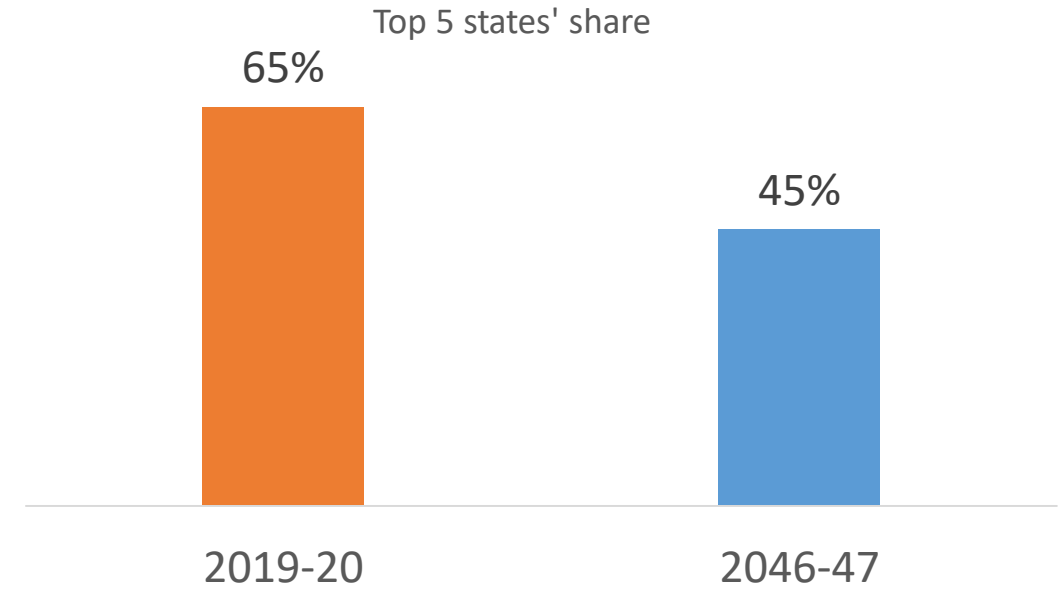
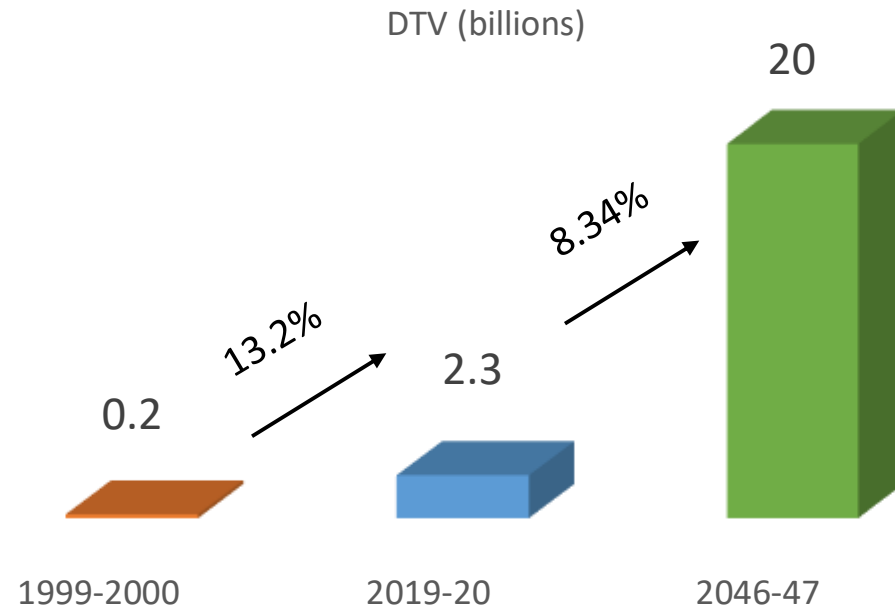
- Match target country – tourism state focus
- Segment marketing – mice, adventure, heritage, SIT
- New products & destinations on mission mode

# Position India as a destination for new age travellers



- Gen z, millennials positioning
- Digitally enabled tourism experiences
- Social media buzz
- Fast, flexible, fun access

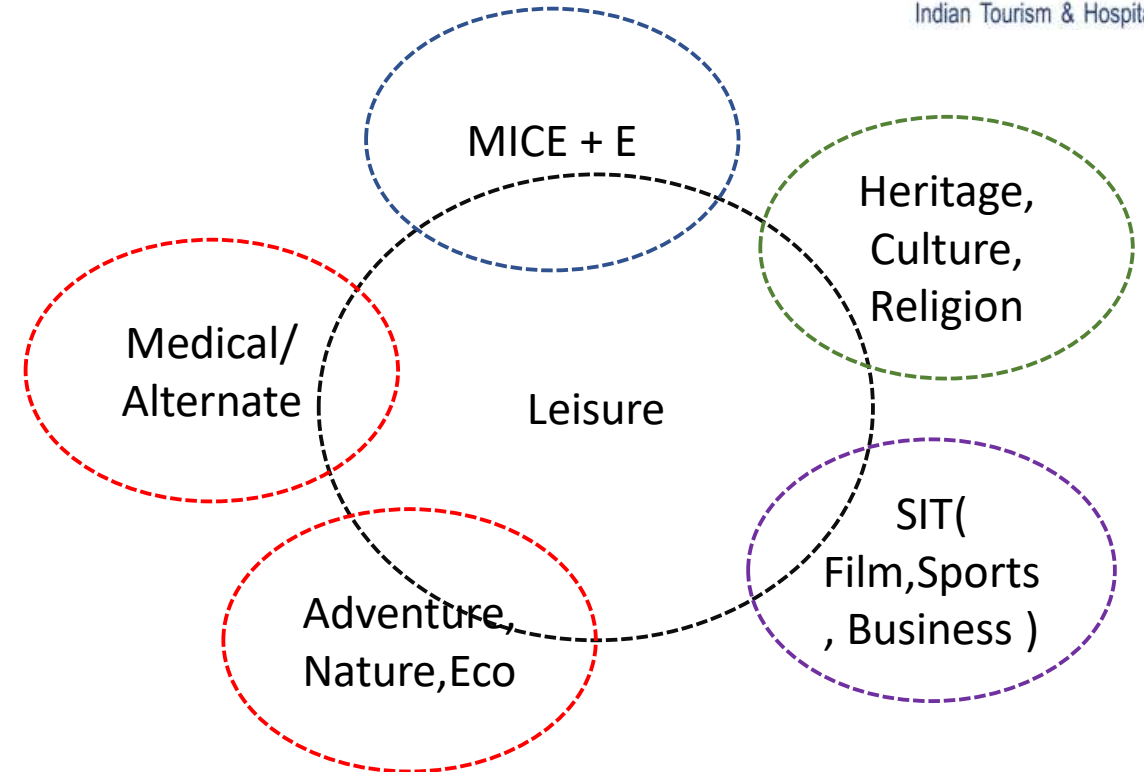
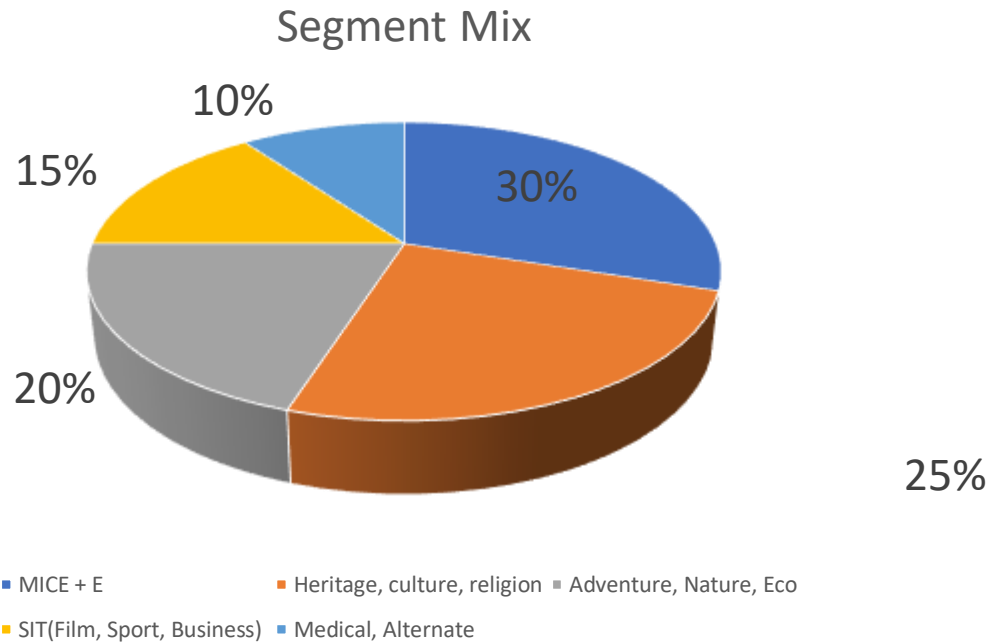
# Create world's largest domestic tourism market



- More world class tourism destinations in India
- Cross states marketing
- State unique tourism propositions & higher dispersal
- Seamless tourism transportation
- Enabling gst
- Beyond AP, Karnataka, UP, TN, Maharashtra



# Indian tourism driven by portfolio focus

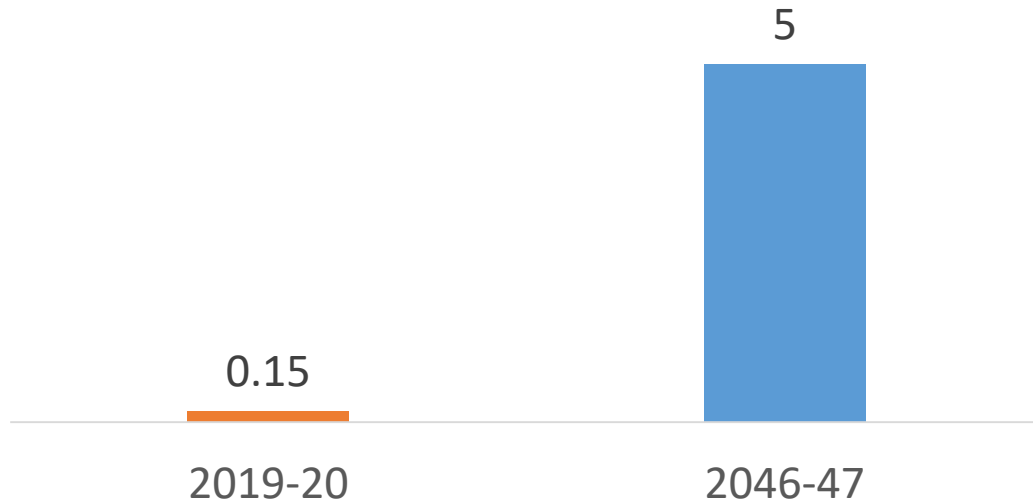


- Segment wise master plans & brands
- Leisure overlap in each segment
- Multi billion + tourism visitation in each segment

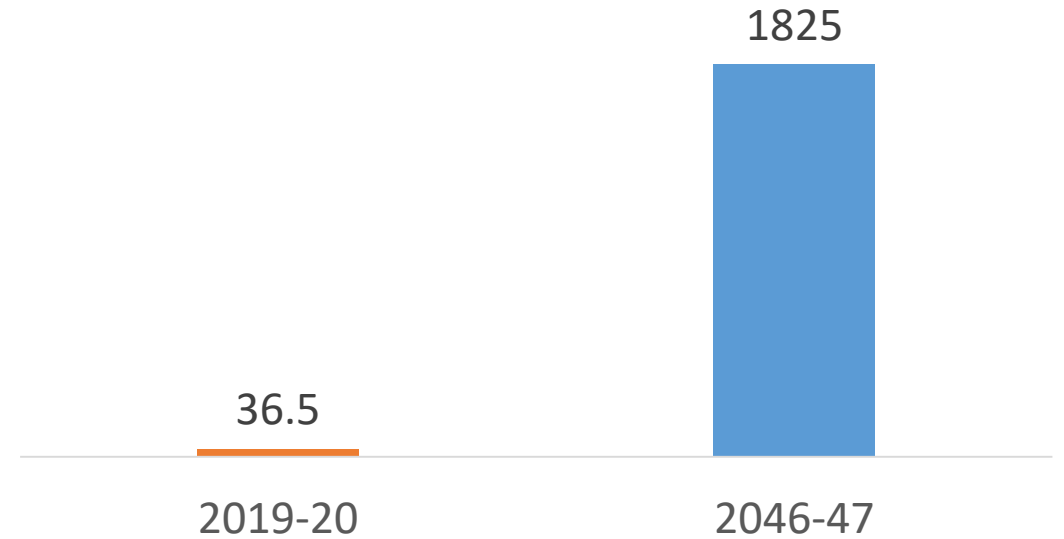


# Enhance branded quality accomodation

Branded/quality Hotel rooms (millions)

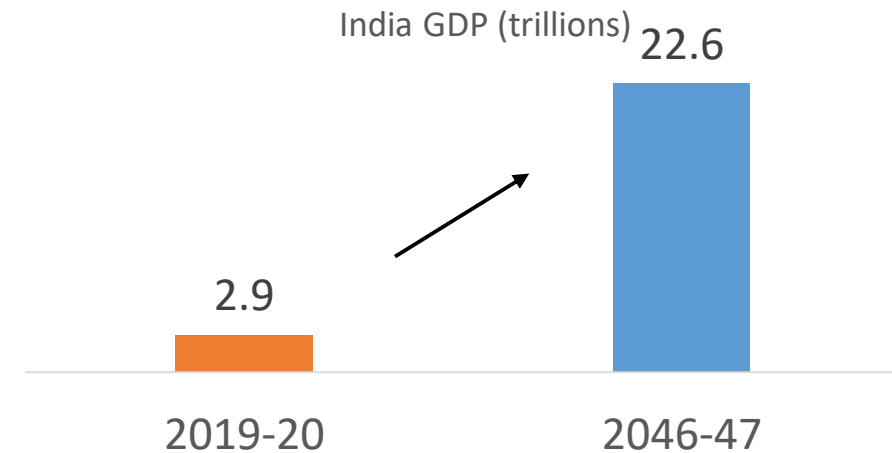
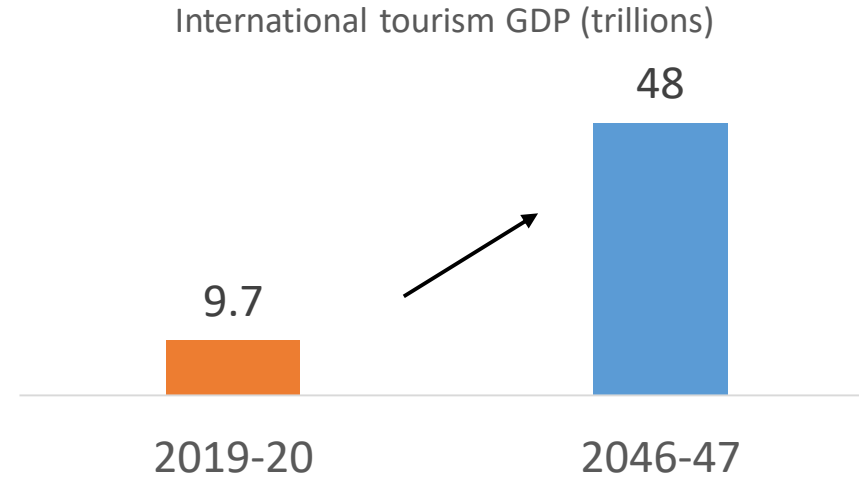
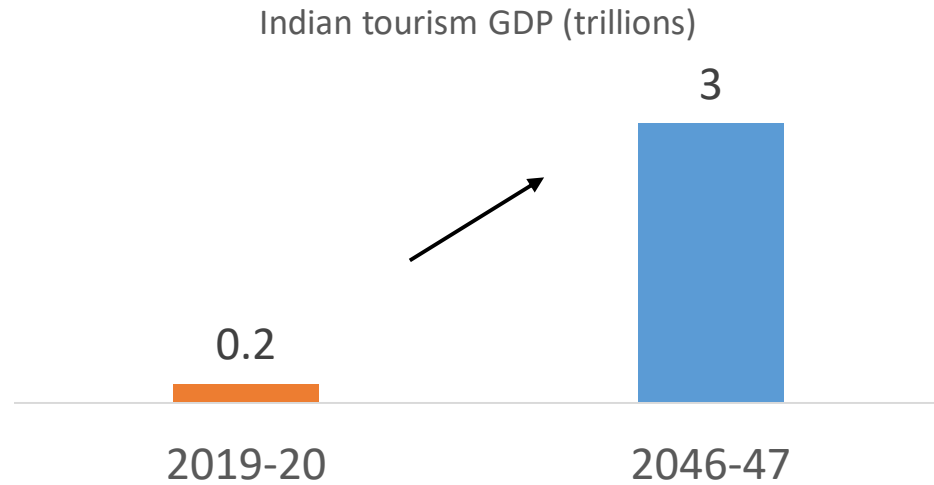


Branded/quality Hotel room nights (millions)



- 100 mn FTA@ 10 nights average will require 1 bn room nights; in addition domestic travellers
- 5 mn rooms @ 0.5 million capex per branded room ( excl land) will cost 2.5 lakh crores
- Low cost of funding required
- PPP with govt equity as land
- Hotel zones demarcation

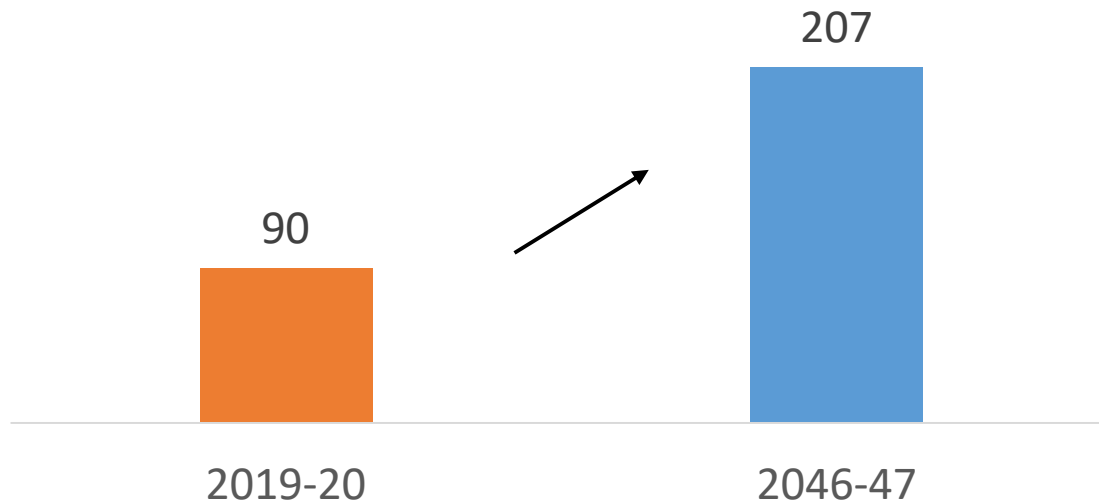
# India's tourism GDP will increase substantially



- Multiplier of 6.6 on tourism forex earnings
- Absorption rate of the economy for tourism products to increase
- % share of tourism to go up to ~13% of GDP from less than 8% with economy growing @8%

# Leading to immense employment potential across Indian mainlands & hinterlands

Indian tourism employment (millions)



- Employee productivity in India was almost \$2200
- Over 20 years with digitisation, AI & global standards, productivity will move towards global standards
- Even at ~ half global productivity of ~\$30000, a \$ 3 trillion tourism economy of India will have jobs potential for upto 20 crores Indians

But a \$3 tn tourism Indian economy  
needs to be enabled...



# Key strategic tourism enablers on mission mode

Export Status for  
tourism FEE

Infrastructure  
status for  
hospitality & MICE

National Tourism  
Council of PM &  
CMs

Globally  
competitive GST  
<10% @ full setoffs

Single window E-  
clearance for  
tourism projects

Segment wise  
master plans

National skills  
repository

Country specific B-B  
& G-C marketing @  
global budgets

Sensitisation on  
tourist safety and  
cleanliness

All India seamless  
tourist  
transportation...

Domestic and MICE  
travel credits

Integrated  
destination  
development and  
connectivity

Sustainable &  
responsible hard  
coded in design  
principles

Safety net for travel  
agents & tour  
operators...

Industry status  
across states &  
rational taxes

The journey is long, **but** is achievable through our partnership...

Jai Hind! 

