

Critical Analysis on Marketing Strategies for the Development of Indian Tourism Industry

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Abstract

The tourism industry has emerged as the largest and fastest growing commercial segment globally, contributing to global economic growth and development. Traditionally, Europe and the United States have remained tourism markets, new emerging economies. The number of international tourists to India is expected to see extraordinary growth in the coming decade. Being a major driver of growth in the Indian services sector, it is only capable of absorbing millions of foreign tourist arrivals and foreign exchange earnings of around Rs 1200.83 billion in the year 2022 (Source: India Brand Equity Foundation), although FTAs in India It accounts for 0.68% of international tourist arrivals in the entire world and 1.71% of total international tourism receipts which is very insignificant in contrast to USA, France etc. (Source: India Tourism Statistics Glimpse, 2021). The objective of this research is to discuss marketing strategies including development of tourism infrastructure and try to suggest solutions to increase foreign tourist arrivals.

Keywords: Foreign ourist, Foreign exchange, Inbound Tourism, Outbound Tourism

Introduction

Tourism indeed plays a significant role in India's economic growth and cultural diversity. India offers a rich tapestry of attractions, including historical monuments, religious sites, natural landscapes, and diverse cultural experiences that draw tourists from around the world. India offers a wide range of tourist attractions, including historical monuments, beaches, religious sites, hill stations, and more. Each region is known for its unique handicrafts, fairs, folk dances, and music. India's geographical diversity, from the Himalayas in the north to its coastal areas, adds to its appeal, offering a variety of destinations and experiences. India is a melting pot of different religions and cultures, including Hinduism, Buddhism, Islam, Christianity, Jainism, Sikhism, and Zoroastrianism, which coexist harmoniously. India is home to numerous places of religious importance, attracting pilgrims and tourists alike. Some popular religious destinations include Varanasi, Puri, Amritsar, and many others. Hill stations like Srinagar, Manali, and Ooty offer respite from the heat and provide scenic beauty. Tourism is a significant contributor to India's economy. It provides employment to both skilled and unskilled workers and supports various sectors, such as hotels, travel agencies, and transportation. Tourism helps promote and preserve India's rich cultural heritage, allowing visitors to gain insights into the country's traditions and customs. India ranks among the top tourist destinations in the Asia-Pacific region, and it is the 11th most visited country in that region. In global rankings, it stands at 40th for tourist arrivals. India offers a wide range of niche tourism products, including adventure, medical, wellness, sports, eco-tourism, and religious tourism. The government actively supports the tourism industry through policies and infrastructure development. Initiatives like "Incredible India" and the promotion of various tourism segments have been successful in attracting international and domestic visitors. While India has seen growth in the tourism sector, its share of international tourist arrivals is relatively low compared to some other countries. India faces competition from established tourist destinations. India has emerged as a significant destination for medical tourism, attracting people seeking high-quality healthcare services at a lower cost. The Indian tourism industry has significant growth potential and is expected to play a substantial role in the country's economic development in the coming years. India's tourism industry is a crucial driver of economic growth, cultural preservation, and global engagement. With continued government support and investment, India has the potential to further enhance its position as a top tourist destination.

Review of Literature

It is shown that the attractiveness acts as a major motivational factor in the choice of tourist destinations and forms a tourist need. Tourist attraction destination can be formed spontaneously or purposefully. The basic tools formation of the tourist areas are tourist destinations and tourism clusters (Morozov and Morozova, 2016). The attractiveness of the area does not

only depend on the characteristics of its corresponding site and the local population, but also from tourist cognitive image perception of the destination (Dimitrov et al., 2017). Destination personality is of positive influence on brand attractiveness and brand awareness, while, brand attractiveness, brand awareness and destination personality have positive influence on brand loyalty (Hurriyati and Setiawan, 2016). The competitiveness of an industry is a critical determinant of how well it performs in world markets. The potential for any country's tourism industry to develop will depend substantially on its ability to maintain competitive advantage in its delivery of goods and services to visitors. Competitiveness is a general concept that encompasses price differentials coupled with exchange rate movements, productivity levels of various components of the tourist industry and qualitative factors affecting the attractiveness or otherwise of a destination. Given some evidence on the price sensitivity of the demand for travel, destinations need to monitor their price competitiveness relative to alternate locations. Changing costs are among the most important factors influencing the choice of a destination with prices being an essential component in the overall tourism competitiveness of a destination (Göral, 2016). Destination image is the sum of perceptual beliefs, knowledge, affective feeling, and total impression that a visitor holds about a particular destination, and it plays a critical role in determining purchase decisions in the destination-choice process, and the attractiveness of a destination. And a good perception leads to a positive destination image, leads tourist satisfaction - which in turn results in destination loyalty (Haarhoff, 2018). The perceptions are crucial in achieving customer satisfaction and customer loyalty and therefore must be handled proactively to develop lasting relationships (Quintal and Polczynski, 2010). The tourist expectation (pre-purchase evaluation) and perceived quality (post-purchase intention) are two major antecedents of tourists' satisfaction (Biodun et al., 2013). The customer satisfaction has a significant indirect effect on behavioral brand loyalty when mediated by attitudinal brand loyalty, including cognitive-affective-conative brand loyalty stages (Back and Parks, 2003). destination image is worse when tourists use a travel agency and Internet together, than when they use a travel agency alone (Frías et al., 2008). In a research study it has been discussed that analysis focuses attention on how heterogeneity in populations taking similar trips should impact data collection for analysis of tourism behavior and destination loyalty (Kozak and Huan, 2002). The travel counselor dependability, expertise, familiarity, and company reputation lead to greater client trust; while dependability, familiarity, and civility predict client satisfaction (Macintosh, 2002).

While most people view themselves as highly individual, their actual motives and activities are quite similar (Prebensen et al., 2003). The travel and tourism industry has become a major contributor to the gross national product of many nations, with marketing tourist destinations and its products becoming a widely recognized practice for both public and private sector organizations (Riege and Perry, 2000). The tourism and hospitality sectors cannot be seen to be immune to fundamental changes in the orientation of marketing. Innovative experience design will become an increasingly important component of tourism and hospitality firms core capabilities (Williams, 2006). Changing demographics and the aging of the global population mean different marketing approaches will be needed to market tourism services to older consumers and also consumers from developing countries such as China and India (Tsiotsou and Ratten, 2010).

The new dynamics of the twenty-first century led to a new competitive environment in the field of tourism and hospitality business. This scenario is driving the industry companies to adopt new strategic marketing options and operational marketing processes (Gustavo, 2013). Gokilavani et al (2022) stated that India attracts special attention in tourism due to its heritage and other competitive advantage. Hence, Indian Tourism sector can use specific marketing strategy to influence people who travel around the world. Increasing the tourism sector in recent years has led in the development of the Indian economy, tourism industry provides several advantages to the nation such as jobs, revenue and foreign exchange. Whilst the tourism industry is rapidly increasing in India and contributes to grow GDP, it also poses many difficulties in creating fresh and good thoughts to support the country's tourism (Chawla & Jha, 2019). Mondal & Samaddar (2021) identified seven critical influencing factors, namely, affordability, consciousness, cultural involvement, status quo biasness, socio-environmental responsiveness, regulatory supervision and technological drivers concerning sharing economy in tourism. Yadav et al (2021) resulted that with the large scale travel restrictions, quarantines, social distancing and lockdown, Covid-19 has given a major impact on the economic development worldwide.

Discussion

This segment of our exploration will illuminate the data composed by numerous facts & figures circulated by ministry of tourism in the previous years and will provide insights about foreign tourist arrivals arriving in India, International tourist arrivals across the globe and Asia-Pacific region, Foreign Exchange Earnings, etc. Furthermore, it enlightens the further

interrelated facts & figures which supports the analysis conducted in the subsequent segments.

Foreign Tourist Arrivals in India

International tourists visited Indian historical heritages since a very prolonged period. As data perceived from Table-1 (Exhibit-1), indicates, in the year 1981, over 1.2 Million foreign tourists visited India accounting an annual growth rate of 2% more than the preceding year. Subsequently after 20 years, India recorded 2.5 Million Foreign tourist arrivals, registering an undeniable twofold growth in tourist arrivals surplus of 1981 records. Foreign tourist arrivals to India have matured four folds and stretched to 8.03 million at an annual growth rate over previous year by 4.50%, in the year 2015. At present, India is anticipated to register 8.74 Million Foreign tourists at an annual growth rate of 8.90% over the year 2015. Comprehending Table-2 and Graph -3 (Exhibit-1), more than 90% foreign tourists arrived at India by means of aerial mode of conveyance and only 7.6% in 2015 arrived via land mode of transportation. According to TABLE- 3, FIGURE-4 & 5 (Exhibit-1), maximum foreign tourists visiting to India are from United States of America i.e. 1.21 Million (15.12%), trailed by enormous tourist arrivals from Bangladesh 1.13 Million (14.13%), UK, Sri Lanka etc.

International Tourist Arrivals across Globe

The information in Table-4 (Exhibit-2) delivers the understanding about global tourism industry which listed 1184 Million International tourists in 2015, comprising 278.6 Million tourists visiting Asia- Pacific region and 8.03 Million tourists visiting India. India positions 40 in global tourism rankings and embraces only 0.68% of International tourist arrivals worldwide. Although witnessing the statistics of Asia-Pacific region, India stands 11th and comprises 2.88% of the total international tourist arrivals in the corresponding region.

Foreign Exchange Earnings

Observing Table-3 (Exhibit-3) deductions can be made that, international tourism receipts globally were around USD 458.2 Billion, in the year 1999, encompassing USD 79.1 billion from Asia-Pacific region alone. Correspondingly, India had logged USD 3.009 billion which is 0.66 % & 3.80% of international tourism receipts globally and Asia-Pacific region, respectively. In the corresponding year, India stood 35th pertaining to foreign exchange earnings recorded all around the world. Subsequently after 17 years, the statistics were fascinating. International tourism receipts in 2015 were listed as USD 1232 Billion encompassing Tourism receipts from Asia-Pacific region to USD 418.9 billion (almost 30% of total international tourism receipts). Correspondingly, India accounts record-breaking foreign exchange earnings of USD 21.071 Billion that is 1.71% and 5.03% of international tourism receipts all around the world and Asia-Pacific region, accordingly. Moreover, India's rank has improved substantially from 35th to 14th regarding foreign exchange earnings accounted all around the world and stands 7th in all over Asia-Pacific region. Looking at Table-6, Figure-12 & 13 (Exhibit-3), in 2015, USA had supreme share of International Tourism receipts i.e. 14.47% valueing USD 178.3 Billion, followed by China (9.26% & USD 114.1 Billion), Spain (4.59% & USD 56.5 Billion), France (3.73% & USD 45.9 Billion), Thailand (3.62% & USD 44.6 Billion), UK (3.44% & USD 42.4 Billion) etc. India positions on 14th with respect to earning International Tourism Receipts and has a share of 1.71% in contrast to International Tourism Receipts around the world.

Problem Statement

Foreign Tourist Arrivals in India are mounting progressively on year-on-year basis at a compound annual growth rate (CAGR) of 7.62% from last sixteen years (from 1999-2015). In the year 2022, India had recorded 8.03 Million of Foreign Tourist Arrivals and made a remarkable growth of 4.5% on previous year. However, this is just **0.68%** of total International tourist arrivals all over the world which are growing at a growth rate of **3.98%** CAGR and that creates a situation of huge untapped market for Indian Tourism Industry. Tourism industry in India is a big foreign exchange earner in India, yet the industry still is hampered by several problems like, Poor infrastructure, Lack of basic hygienic amenities at halting points, Non-standardization of rates and fares, Poor maintenance of heritages, costly travel, Uneven progress, bureaucracy, poor administration & management, crowd management, involvement of too many agents and tourism operators also makes the cost of tourism package too high in India and lack of sound marketing and promotion strategies. Nayak & Sharma (2012) identified the issues of tourists with reduced mobility are poor infrastructure, perception of safety in the region, competitors having more competitively priced packages, Acute shortage of trained manpower, perception of tourism environment. According to a report published by IITTM (2010), there are some more problems which influence the travel decisions and

behaviour as poor understanding of the tourists' specific requirements among the booking staff and prevalence of their inhospitable attitude, lack of proper information and inadequate signages at major points of reference, inappropriate location for stay and lack of necessary facilities in hotels. Babu & Maran (2013) further highlighted a few more factors, which also limit the growth of tourism in India, as inadequate airline capacity, particularly during the peak tourist season, bad conditions of airports, delays in getting the bookings, flight cancellations, delays render air travel in India frightening for foreign tourists, due to appalling conditions of traveling by trains, absence of an up to date travel information systems, lack of an integrated tourism promotion program, indifference of many states and union territories to tourism.

Objective of The Study

- To study about the tourism industry in the context of growth and development
- To investigate the barriers and challenges in the arrival of Foreign Tourists to India
- To try to suggest the marketing strategy for the expansion of tourism industry

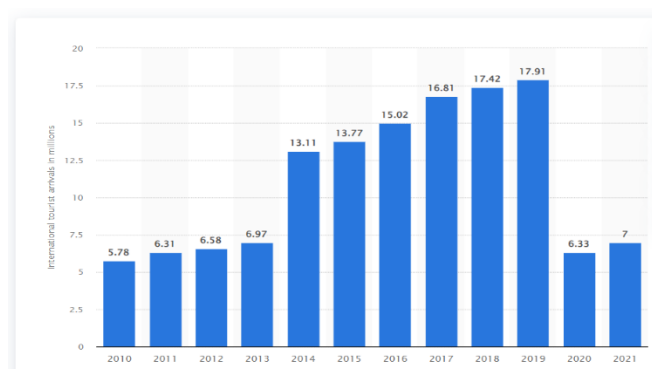
Research Methodology

This study is based on secondary data gathered from various sources; Reports of Tourism Industry, published articles, research papers in journals, online/offline literature and other relevant data. The Trend-Line Analysis, Porter's 5 Forces analysis, SWOT and TOWS have been used to analyze the data. Based on analysis, the study tries to formulate appropriate marketing strategies to inspire Foreign Tourist arrivals in India.

Data Analysis & Results

Trend Line Analysis & Interpretation

Figure-1
Number of international tourist arrivals in India from 2010 to 2021 (in millions)



Source: India Tourism Statistics at Glance

Trend lines in Figure-1 illuminates a positive slope to signify Indian tourism industry shall witness a huge progress in inflow of Foreign Tourist in forthcoming years.

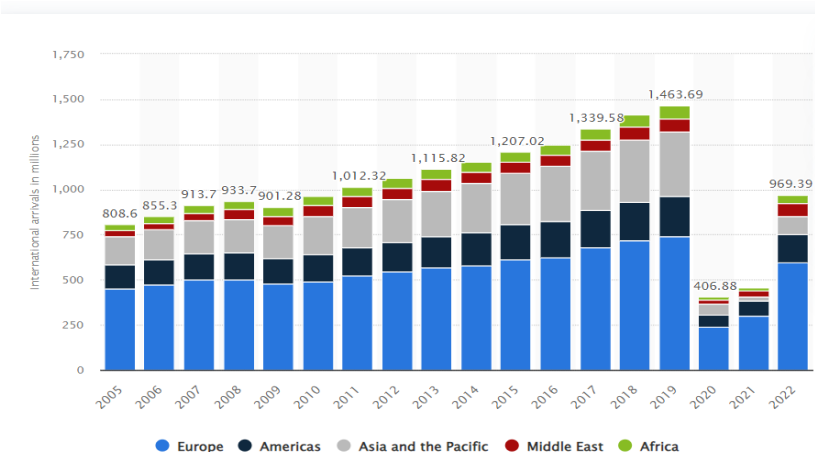
Figure-2
Annual Growth Rate of FTA's in India



Source: India Tourism Statistics at Glance

Correspondingly, in Figure-2, the trend line of annual growth rate displays a positive slope representing growing inbound tourism in Indian tourism industry shall expand specifically in forthcoming years.

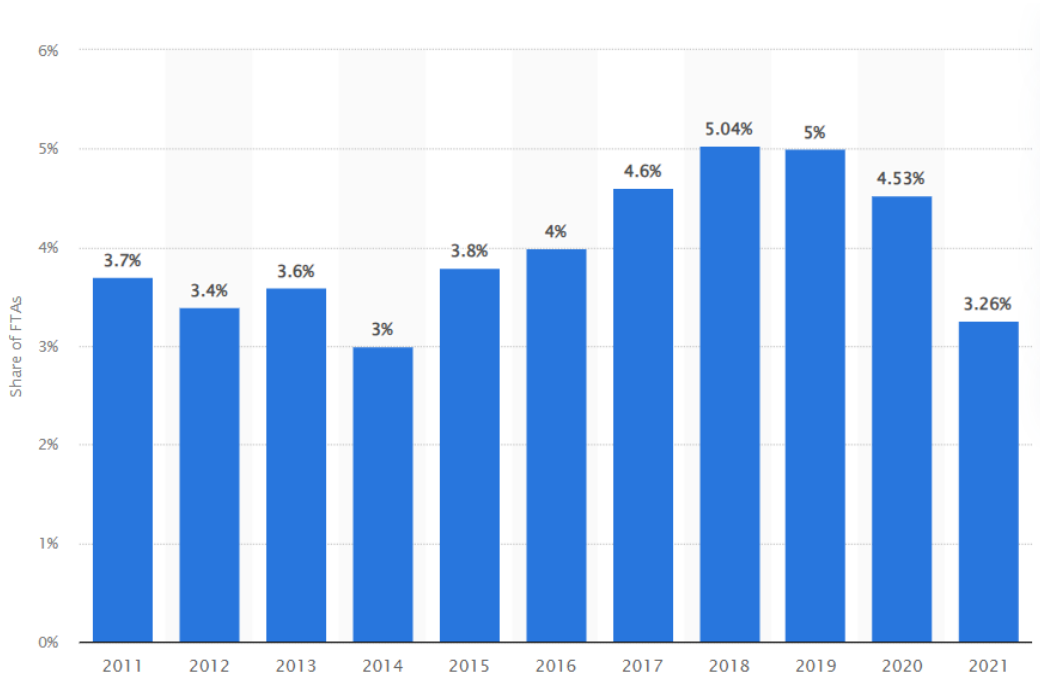
Figure-3
International tourist arrivals worldwide from 2005 to 2022 (in millions)



Source: UNWTO Tourism Market Trends

Figure-3 specifies, trend-lines for International tourist arrivals worldwide and in Asia-Pacific region have positive slopes suggesting that in subsequent years' global tourism industry is to witness a gigantic progress in travelers and tourist arrivals.

Figure-4
Share of Foreign Tourist Arrivals to India from 2011 To 2021



Source: UNWTO Tourism Market Trends 2007; UNWTO Barometer 2010, 2014, 2015, 2016; UNWTO Tourism Highlights 2011

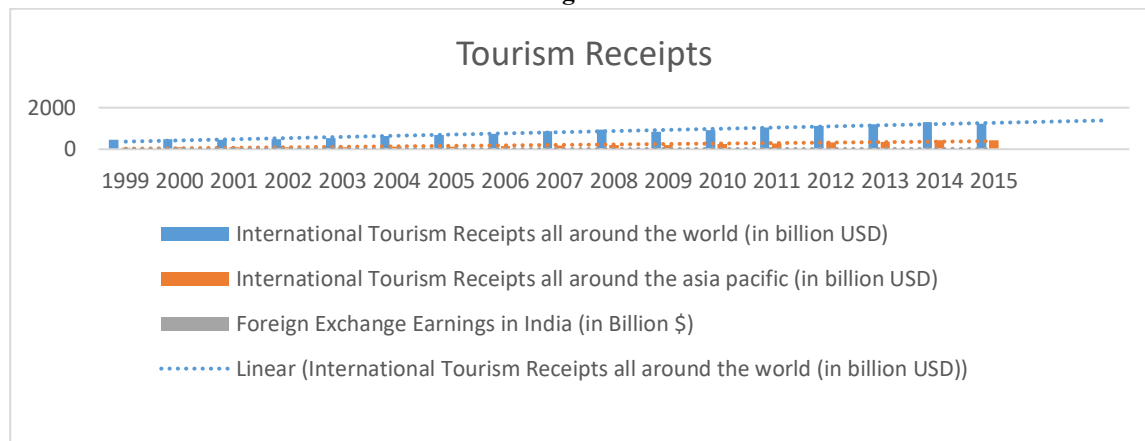
Figure-4, displays trend-lines for India's share in International tourist arrivals worldwide and in Asia-Pacific region have positive slopes, indicating that in succeeding years' Indian tourism industry would prosper and shall contribute a relatively larger chunk to the country's GDP. However, India has a very minimal share in global tourist arrivals.

Figure-5



Source: UNWTO Tourism Market Trends; UNWTO Barometer; UNWTO Tourism Highlights
Perceiving Figure-5, the slope of trend-line in lieu of India's position in worldwide international tourist arrivals has a negative slope, signifying India's position has been improving every year with respect to global tourism.

Figure-6



Source: Bureau of Immigration, India

Understanding Figure-6, trend-lines designed for tourism receipts all around the world, Asia-Pacific & India have positive slopes hinting to upsurge subsequently in the following years.

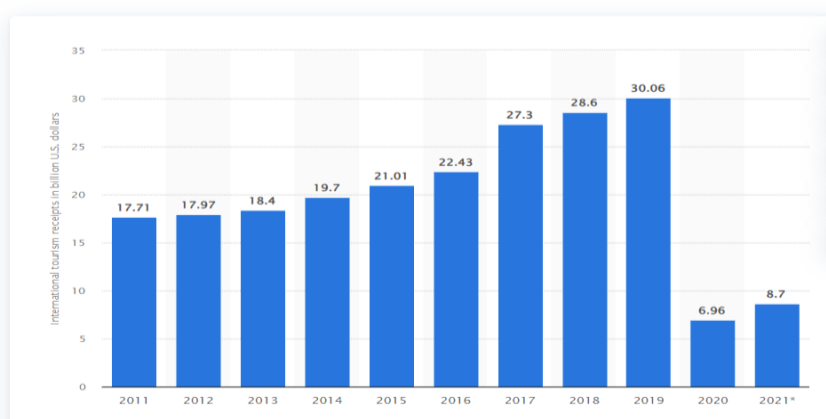
Figure-7



Source: Bureau of Immigration, India

Noticing Figure-7, India's share in International tourism receipts with regards to all around the world & Asia-Pacific region is growing every year as the trend-lines depicts positive slopes. However, it can be comprehended that in previous few years India's share in worldwide tourism receipts declined to a certain extent however on the other hand India's share in tourism receipts of Asia Pacific region have seen a positive trend of growth.

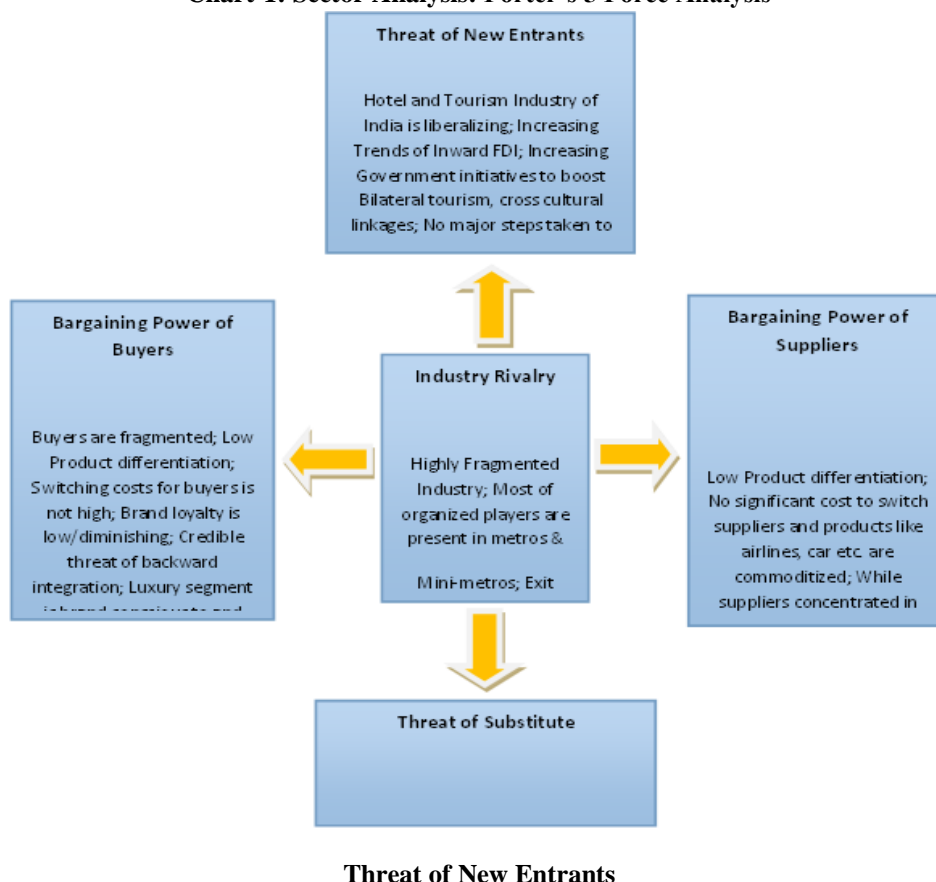
Figure-8
International tourism receipts of India from 2011 to 2021
(in billion U.S. dollars)



Source: Bureau of Immigration, India

Observing Graph 8, India's rank has substantially increased with respect to International Tourism receipts, however it remained stagnated in Asia Pacific region.

Chart-1: Sector Analysis: Porter's 5 Force Analysis

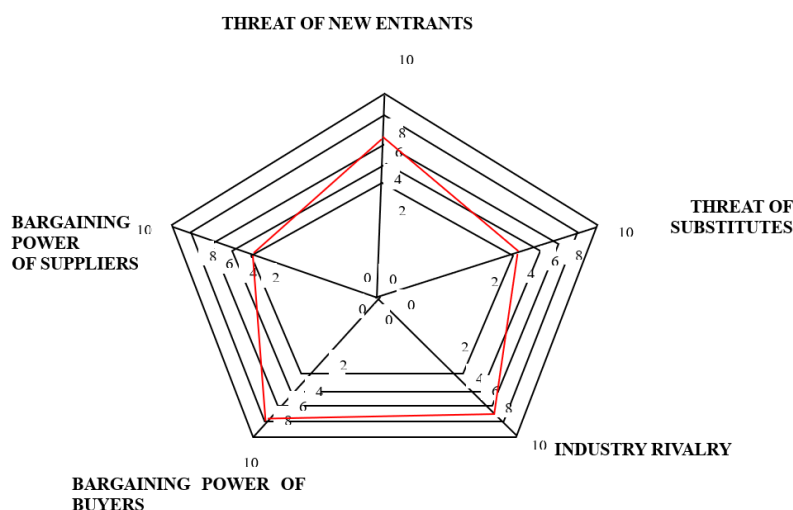


Result for Porter's Five Forces Analysis

Porter's 5 Forces Web


Threat of new entrants	:	7/10 :	MODERATE – HIGH
Threat of substitutes	:	3/10 :	LOW
Industry Rivalry	:	7/10 :	MODERATE – HIGH
Bargaining power of buyers	:	8/10 :	HIGH
Bargaining power of suppliers	:	3/10 :	LOW


Total	:	28/50	: To Be Determined through Porter's Web
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As the web is Medium in size, therefore industry is good for new firms to establish themselves in tourism industry. Also, it signifies that Tourism industry will be surely growing in the upcoming decade.

SWOT & TOWS Analysis

	Strengths	Weakness
IFAS 	Foreign Tourist Arrivals in India are surging up at a Compound Annual Growth Rate of 5.55%, from the year 1981-2015.	India's rank in respect to International Tourism receipts earned in Asia-Pacific region has remained constant over the past years.
	Inbound tourists preferably choose Aerial mode of transportation over the other available modes.	Other than Aerial mode of transportation, other modes are not preferred by inbound tourists.
	United States of America & Bangladesh aggregates maximum foreign tourists visiting to India.	Industry is hampered by several problems like
	India ranks 14 th across the world in grossing foreign exchange.	Poor & Lack of Requisite Infrastructure Lack of basic hygienic amenities at halting points

<p style="text-align: center;">EFAS</p> 	<p>The hotel and tourism sector of India attracted around US\$ 9.23 billion of FDI, from April 2000 – March 2016</p> <p>Low Prices</p> <p>Diverse Portfolio offerings - Medical Facilities, Adventure Tourism</p> <p>Diverse Attractions – Festivals, Historical Monuments, Ancient Arts, Multi-cultural Heritage</p>	<p>Non-standardization of rates and fares</p> <p>Poor maintenance and cleanliness of heritages & other tourist places</p> <p>Bureaucracy</p> <p>crowd management</p> <p>Costly travel due to involvement of too many agents and tourism operators also makes the cost of tourism package too high in India</p> <p>lack of sound marketing and promotion strategies.</p> <p>High entry barriers in tourism offerings other than</p> <p>No sufficient Facilities - Banking and Financial System, Accommodation Quality, Availability of desired food</p> <p>Behavior of Country residents – Corruption, Terrorism, Begging and Cheating</p>
<p style="text-align: center;">Opportunities</p> <p>The trend line analysis tip-offs that India will perceive a huge growth of Foreign Tourist arrivals, in the approaching decade.</p> <p>International Tourist arrivals are growing at CAGR of 3.74% and are mounting every year.</p> <p>Shift of the global foreign tourist's arrivals from developed economies to emerging economies</p> <p>Over USD 1200 Billion, is spent on tourism by outbound tourists every year. Almost around USD 400 billion is spent for tourism in Asia-Pacific region.</p>	<p style="text-align: center;">SO Strategies</p> <p>Stimulate Indian tourism offerings via Airline industry.</p> <p>Serve foods packaged with Indian historic monument photos, values, culture, pamphlets providing incentives for travelling in India to all possible travelers travelling through air mode of transportation.</p> <p>Advertise Indian Tourism on the exterior of the Indian flights, back of boarding passes, on e-tickets, visas etc.</p> <p>Promote E-Visa and VoA scheme by advertising it through airline industry offerings.</p>	<p style="text-align: center;">WO Strategies</p> <p>Promote intra-Asia regional tourism by providing higher incentives to Asian inbound tourists to explore Indian tourism offerings.</p> <p>Build and develop rail and road connectivity between India and various Asian countries. For ex; India-Myanmar -Thailand Highway.</p> <p>Promote Indian Tourism offerings on these newly build highways and railway connectivity.</p> <p>Renovate all historical monuments & heritages.</p> <p>Establish an administration for managing and increasing transport</p>

<p>The Indian government has realized the country's potential in the tourism industry and has taken several steps to make India a global tourism hub.</p> <p>Stupendous growth in medical tourism, adventure tourism etc.</p> <p>Growing demand for E-Visa & Visa on Arrival policies.</p>	<p>Hire & Train more ground staff personals like Airhostess and Stuarts to make Indian Tourism a mouth of word for foreign travelers.</p> <p>Conduct the above-mentioned strategies most on flights going to USA, Bangladesh, UK, Sri Lanka etc. From where the major chunk of inbound tourists come to India.</p> <p>Product development - More Customized services, Specific location oriented packages, Low cost packages.</p> <p>Provide incentive to explore the historic monuments, heritages, culture, festivals etc.</p> <p>Campaign tourism in India more and more through sports programs like IPL in Cricket, Pro Kabbaddi league, ISL football etc.</p> <p>Advertise festivals like Kumbhmela etc. in foreign countries especially USA, which have a serious potential to drive in foreign tourists.</p> <p>Ministry of Tourism should allow and attract more FDI's in Medical and Adventure Tourism.</p> <p>Develop more medical tourism platforms like android mobile applications, online portals, video conferences etc.</p> <p>Build and Develop more amusement Parks and secondary entertainment facilities</p>	<p>connectivity to all the tourist destinations available in India.</p> <p>Allow hard currency transactions to take place in a restricted market i.e. Major Tourist areas.</p> <p>Standardize the tourism fares at tourist places; i.e. No different rates for different class of people or in other words single fare for everyone.</p> <p>Standardization of public transport fares according to time oriented rather than distance oriented. I.e. Low fixed price at peak hours and high fixed price in non-peak hours.</p> <p>Build more and more public toilets, drainage systems, water facilities at various tourist destinations {like TTD in Tirupati Balaji} and hire and train more staff for managing the infrastructure.</p> <p>Conduct more strict campaigns for Swachh Bharat Abhiyaan at organizational and civilian levels.</p> <p>Eliminate some excessive bureaucracy by reducing the hierarchy in the industry or decentralize the decision-making powers to different lower level units however conduct reviews and audits regularly to ensure the main objective is met properly.</p> <p>Allocate different visiting slots to tourists and give first preference to foreign tourists.</p> <p>Hire & train more personals to manage the crowd in long lines at tourist destinations.</p> <p>Provide the tourists waiting in lines with refreshments, tea, coffees etc., via promoting Indian Tourism through innovative packaging.</p>
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Threats	ST Strategies	WT Strategies
India has comparatively bare minimum share in international tourist arrivals.	Provide incentives to stimulate tourists to visit India from Africa, Asia and Pacific countries like China,	Attract more PPP's, JV's, Merger's & Acquisition in high competitive sectors like hotels, hospitals, adventure tourism etc.

<p>Rising competition in Global tourism as USA is ranking one in earning International Tourism receipts and grosses almost eightfold of India's foreign exchange earnings.</p> <p>Lack of Manmade attractions gives an edge to the competitors.</p> <p>Frequent Communal Riots</p> <p>No stability in Monetary Policy of India.</p> <p>Continuous threat of terrorists attacks</p>	<p>Brunei Darussalam and other African countries etc.</p> <p>Allocate funds to develop subsidiaries in countries from which inbound tourist arrivals in India are minimal; to promote Indian Tourism, and design the standard operating procedures for the subsidiaries to conduct Tourist behavior researches as well as political and cultural researches in countries from which inbound tourist arrivals in India are minimal and accordingly to develop promotional strategies.</p> <p>Invest more in R&D to create more man-made attractions</p> <p>Build Develop & manage more wildlife and coastal tourism</p> <p>Allow circulation of hard currency in restricted market (Tourist areas, hospitals, hotels etc.)</p> <p>Increase FOREX trading centers within the tourist cities to facilitate quick & smooth FOREX transactions for tourists.</p> <p>Provide adequate safety at Tourist areas.</p>	<p>Ministry of Tourism should enter agreements to increase bilateral tourism in India and other countries within Asia-Pacific region.</p> <p>Introduce low cost passenger carrier vessels in sea mode of transportation for increasing intra-Asia-Pacific tourism.</p> <p>Increase Tourist protection by hiring more personals for Police, army, navy, Air force, NSG etc.</p>
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Horizon Planning / Suggestions

Short Term (0-1 Year)

Stimulate Indian tourism offerings via Airline industry

- ✓ Serve feedings packaged with Indian historic monument photos, values, culture, pamphlets providing incentives for travelling in India to all possible travelers travelling through air mode of transportation.
- ✓ Advertise Indian Tourism on the exterior of the Indian flights, back of boarding passes, on e-tickets, visas etc.
- ✓ Promote E-Visa and Visa-on-Arrival scheme by advertising it through airline industry offerings.
- ✓ Hire & Train more ground staff personals like Airhostess and Stuarts to make Indian Tourism a mouth of word for foreign travelers.
- ✓ Conduct the above-mentioned strategies most on flights going to USA, Bangladesh, UK, Sri Lanka etc. From where the major chunk of inbound tourists come to India.
- Conduct more strict campaigns for Swachh Bharat Abhiyaan at organizational and civilian levels.
- Build more and more public toilets, drainage systems, water facilities at various tourist destinations {like TTD in Tirupati Balaji} and hire and train more staff for managing the infrastructure.
- Provide incentive to explore the historic monuments, heritages, culture, festivals etc.
- Allocate different visiting slots to tourists and give first preference to foreign tourists.
- Conduct aggressive Indian tourism promotional campaigns on social media platforms like Facebook, twitter, LinkedIn etc.
- Hire more graduates for content writing to promote Indian tourism through social media.

- Collaborate with e-commerce websites like amazon, Alibaba, Jabong etc. to promote Indian tourism offerings and pull in foreign tourists in the country.
- Proper communication of messages like “Athithi Devo Bhava”, “Incredible India” and “Swachh Bharat Abhiyaan” through all possible medias.
- Advertising campaign more for medical and adventure tourism.
- Develop and manage a proper platform for Indian Handicrafts and local crafts sales.
- Develop Banks and ATM facilities in major tourist attractions of the country.
- Single window facility should be provided for booking rooms in city hotels and other tourism related services.
- Hire & train more personals to manage the crowd in long lines at tourist destinations.
- Provide the tourists waiting in lines with refreshments, tea, coffees etc., via promoting Indian Tourism through innovative packaging.
- Campaign tourism in India more and more through sports programs like IPL in Cricket, Pro Kabbaddi league, ISL football etc.
- Advertise festivals like Kumbhmela etc. in foreign countries especially USA, which have a serious potential to drive in foreign tourists.
- Provide incentives to stimulate tourists to visit India from Africa, Asia and Pacific countries like China, Brunei Darussalam and other African countries etc.
- Provide adequate safety at Tourist areas.
- Increase Tourist protection by hiring more personals for Police, army, navy, Air force, NSG etc.
- ✓ Product development- More Customized services; Specific location oriented packages; Low cost packages.
- Increase FOREX trading centers within the tourist cities to facilitate quick & smooth FOREX transactions for tourists.

Medium Term (1-5 Years)

- Renovate all historical monuments & heritages.
- Ministry of Tourism should allow and attract more FDI's in Medical and Adventure Tourism.
- Develop more medical tourism platforms like android mobile applications, online portals, video conferences etc.
- Allow hard currency transactions to take place in restricted market i.e. Major Tourist areas.
- Eliminate some excessive bureaucracy by reducing the hierarchy in the industry or decentralize the decision-making powers to different lower level units however conduct reviews and audits regularly to ensure the main objective is met properly.
- Standardize the tourism fares at tourist places; i.e. No different rates for different class of people or in other words single fare for everyone.
- Standardization of public transport fares according to time oriented rather than distance oriented. I.e. Low fixed price at peak hours and high fixed price in non-peak hours.
- Attract more PPP's, JV's, Merger's & Acquisition in high competitive sectors like hotels, hospitals, adventure tourism etc.
- Invest more in R&D to create more man-made attractions
- Build Develop & manage more wildlife and coastal tourism
- Build and Develop more amusement Parks and secondary entertainment facilities.
- Allow circulation of hard currency in restricted market (Tourist areas, hospitals, hotels etc.)
- Structure the inbound tour operator industry by amalgamating all the tour operators, agents etc., in a single CPSU operating in a network structure.
- Allocate funds to develop subsidiaries in countries from which inbound tourist arrivals in India are minimal; to promote Indian Tourism, and design the standard operating procedures for the subsidiaries to conduct Tourist behavior researches as well as political and cultural researches in countries from which inbound tourist arrivals in India are minimal and accordingly to develop promotional strategies.

Long Term (5-10 Years)

- Promote intra-Asia regional tourism by providing higher incentives to Asian inbound tourists to explore Indian tourism offerings.

- Build and develop rail and road connectivity between India and various Asian countries. For ex; India-Myanmar -Thailand Highway.
- Promote Indian Tourism offerings on these newly build highways and railway connectivity.
- Establish an administration for managing and increasing transport connectivity to all the tourist destinations available in India.
- Ministry of Tourism should enter agreements to increase bilateral tourism in India and other countries within Asia-Pacific region.
- Introduce low cost passenger carrier vessels in sea mode of transportation for increasing intra-Asia-Pacific tourism.

Conclusion

India is gifted with a wealth of exquisiteness of natural as well as man-made artifacts which could boost a stupendous inflow of foreign tourists arriving in the country. Tourism industry holds an abundant prospective to embellish its cultural and historical heritage. Therefore, the ministry of tourism should implement the strategies provided above in the Horizon planning /suggestion section of this paper. UNWTO highlights discovered in their investigation that there will be a shift in global trend of foreign tourist arrival from advanced economies to emerging economies and India being a developing economy should consequently be prepared enough to seize the benefits of this opportunity. To take full advantage of these growing opportunities, India should make some tough calls. This paper instigates the discussion with a brief introduction of Indian tourism followed by comprehending the literature gathered from certain various sources. Three different analysis were conducted i.e. trend-line analysis, porter's 5 forces analysis and SWOT & TOWS analysis. Results of the analysis shows that India's tourism sector is growing at a robust pace and is going to witness a boom soon. Therefore, this paper is an attempt to give idea of direction to the ministry to pursue ahead and capitalize the growing opportunities in global tourism industry.

Exhibit-1

Table-1: Foreign Tourist Arrivals in India

Year	Foreign Tourist Arrivals in Numbers	Foreign Tourist Arrivals in Numbers (in millions)	Annual Growth (%)
1981	1279210	1.28	2%
1982	1288162	1.29	0.70%
1983	1304976	1.3	1.30%
1984	1193752	1.19	-8.50%
1985	1259384	1.25	5.50%
1986	1451076	1.45	15.20%
1987	1484290	1.48	2.30%
1988	1590661	1.6	7.20%
1989	1736093	1.73	9.10%
1990	1707158	1.7	-1.70%
1991	1677508	1.67	-1.70%
1992	1867651	1.86	11.33%
1993	1764830	1.76	-5.50%
1994	1886433	1.88	6.90%
1995	2123683	2.12	12.60%
1996	2287860	2.28	7.70%
1997	2374094	2.37	3.80%
1998	2358629	2.35	-0.70%
1999	2481928	2.48	5.20%
2000	2649378	2.65	6.70%

2001	2537282	2.54	-4.20%
2002	2384364	2.38	-6.00%
2003	2726214	2.73	14.30%
2004	3457477	3.46	26.80%
2005	3918610	3.92	13.30%
2006	4447167	4.45	13.50%
2007	5081504	5.08	14.30%
2008	5282603	5.28	4.00%
2009	5167699	5.17	-2.20%
2010	5775692	5.78	11.80%
2011	6309222	6.31	9.20%
2012	6577745	6.58	4.30%
2013	6967601	6.97	5.90%
2014	7679099	7.68	10.20%
2015	8027133	8.03	4.50%
2016(P)	8741547.837	8.74 (P)	8.90%

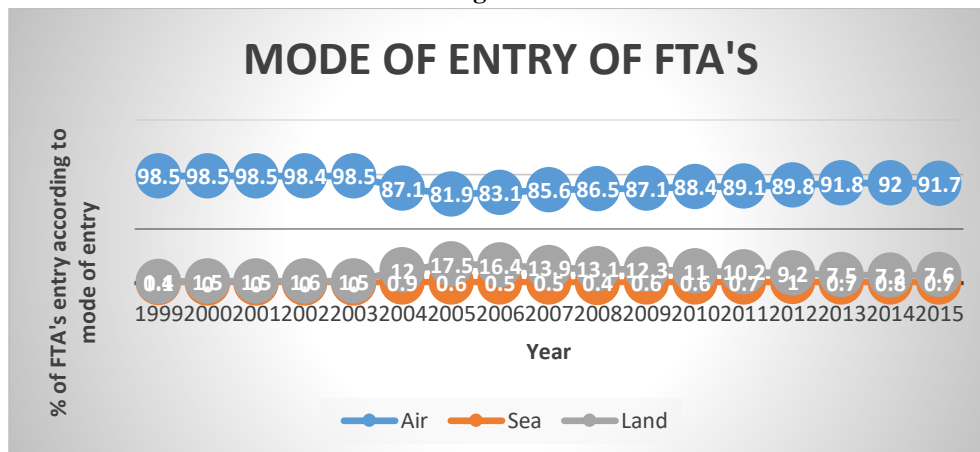
Source: India Tourism Statistics at Glance, 2015

Exhibit 2
Table-2: Mode Of Entry Of FTA's

Year	Arrivals	% Distribution by Mode of Travel		
		Air	Sea	Land
1996	2287860	98.5	0.1	1.4
1997	2374094	98.5	0	1.5
1998	2358629	98.5	0	1.5
1999	2481928	98.4	0	1.6
2000	2649378	98.5	0	1.5
2001	2537282	87.1	0.9	12
2002	2384364	81.9	0.6	17.5
2003	2726214	83.1	0.5	16.4
2004	3457477	85.6	0.5	13.9
2005	3918610	86.5	0.4	13.1
2006	4447167	87.1	0.6	12.3
2007	5081504	88.4	0.6	11
2008	5282603	89.1	0.7	10.2
2009	5167699	89.8	1	9.2
2010	5775692	91.8	0.7	7.5
2011	6309222	92	0.8	7.2
2012	6577745	91.7	0.7	7.6
2013	6967601	91	0.5	8.5
2014	7679099	86.1	0.4	13.5
2015	8027133	90.7(P)	0.4(P)	8.8 (P)

Source: Bureau of Immigration, India

Exhibit 3
Figure- 9



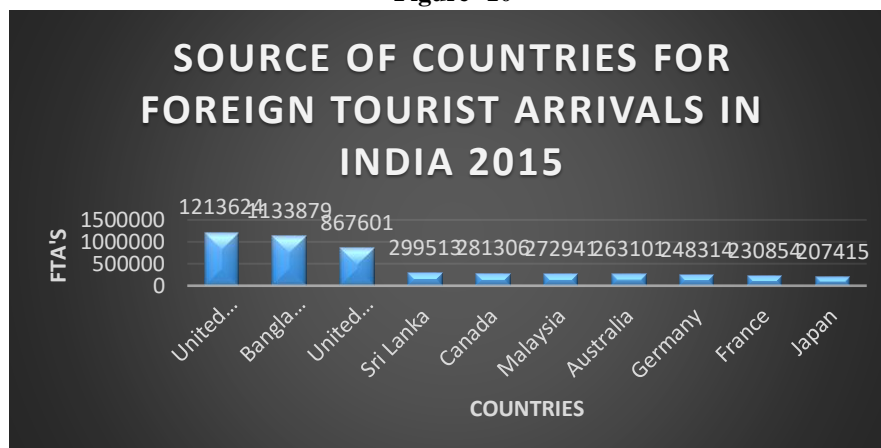
Source: Bureau of Immigration, India

Table-3: Source of FTA's

Source Country	FTAs	Percentage (%) Share
United States	1213624	15.12
Bangladesh	1133879	14.13
United Kingdom	867601	10.81
Sri Lanka	299513	3.73
Canada	281306	3.5
Malaysia	272941	3.4
Australia	263101	3.28
Germany	248314	3.09
France	230854	2.88
Japan	207415	2.58
Total top 10 Country	5018548	62.52
Others	3008585	37.48
Total	8027133	100

Source: Bureau of Immigration, India

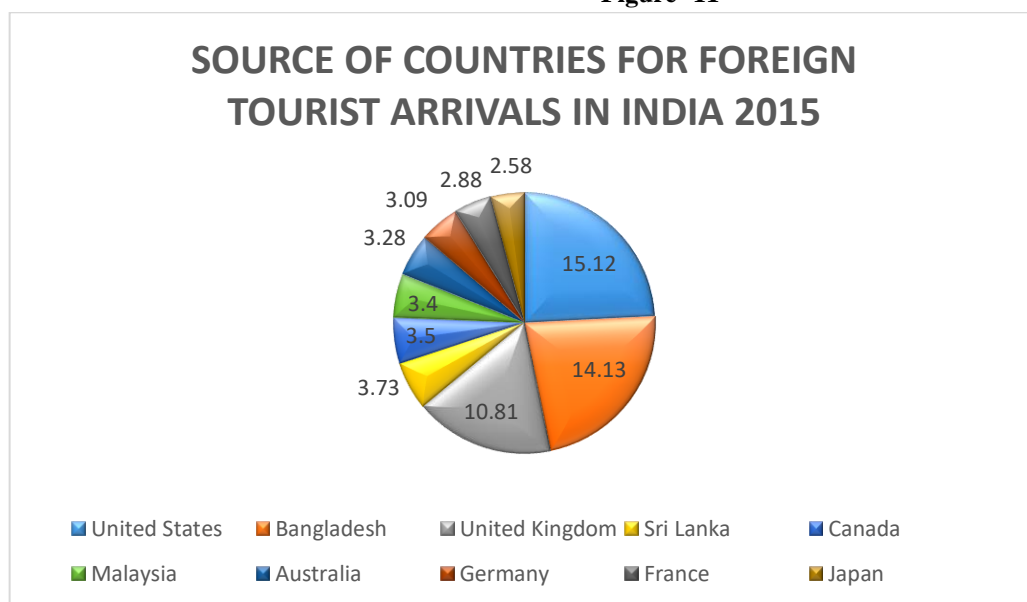
Exhibit 4
Figure- 10



Source: Bureau of Immigration, India

Exhibit 5

Figure- 11



Source: Bureau of Immigration, India

Exhibit 6

Table-4: International Tourist Arrivals across Globe

Year	International Tourist Arrivals all around world (in million)	Foreign Tourist Arrivals all around Asia Pacific (in million)	Foreign Tourist Arrivals in India (in millions)	Percentage (%) share of FTA's in India w.r.t. International Tourist Arrivals all around world	Percentage (%) share of FTA's in India w.r.t. Foreign Tourist Arrivals all around Asia Pacific	Rank of India w.r.t. International Tourist Arrivals all around world	Rank of India w.r.t. Foreign Tourist Arrivals all around Asia Pacific
1999	633.8	97.6	2.48	0.39	2.54	46	11
2000	683.3	109.3	2.65	0.39	2.42	50	12
2001	683.4	114.5	2.54	0.37	2.22	51	12
2002	703.2	123.4	2.38	0.34	1.93	54	11
2003	691	111.9	2.73	0.39	2.44	51	11
2004	762	143.4	3.46	0.45	2.41	44	11
2005	803.4	154.6	3.92	0.49	2.53	43	11
2006	846	166	4.45	0.53	2.68	44	11
2007	894	182	5.08	0.57	2.79	41	11
2008	917	184.1	5.28	0.58	2.87	41	11
2009	883	181.1	5.17	0.59	2.85	41	11
2010	948	204.9	5.78	0.61	2.82	42	11
2011	994	218.5	6.31	0.63	2.89	38	9
2012	1039	233.6	6.58	0.63	2.82	41	11
2013	1087	249.7	6.97	0.64	2.79	41	11
2014	1134	264.3	7.68	0.68	2.91	41	12
2015	1184	278.6	8.03	0.68	2.88	40	11

Year	International Tourism Receipts all around the world (in billion USD)	International Tourism Receipts all around Asia Pacific (in billion USD)	Foreign Exchange Earnings in India (in Billion USD)	Percentage (%) share of India's tourism receipts w.r.t. world tourism receipts.	Percentage (%) share of India's tourism receipts w.r.t. Asia-pacific tourism receipts.	Rank of India's tourism receipts w.r.t. world tourism receipts.	Rank of India's tourism receipts w.r.t. Asia-pacific tourism receipts.
1999	458.2	79.1	3.009	0.66%	3.80%	35	NA
2000	475.3	85.3	3.46	0.73%	4.06%	36	10
2001	463.8	88.1	3.198	0.69%	3.63%	36	12
2002	481.9	96.5	3.103	0.64%	3.22%	37	13
2003	529.3	93.7	4.463	0.84%	4.76%	37	9
2004	633.2	124.1	6.17	0.97%	4.97%	26	8
2005	679.6	135	7.493	1.10%	5.55%	22	7
2006	744	156.9	8.634	1.16%	5.50%	22	7
2007	857	187	10.729	1.25%	5.74%	22	6
2008	939	208.6	11.832	1.26%	5.67%	22	6
2009	853	204.2	11.136	1.31%	5.45%	20	7
2010	931	255.3	14.193	1.52%	5.56%	17	7
2011	1042	289.4	16.564	1.59%	5.72%	18	8
2012	1117	329.4	17.737	1.59%	5.38%	16	7
2013	1198	360.2	18.445	1.54%	5.12%	16	8
2014	1295	420.1	20.236	1.56%	4.82%	15	7
2015	1232	418.9	21.071	1.71%	5.03%	14	7

Source: Bureau of Immigration, India

EXHIBIT-7

FOREIGN EXCHANGE EARNINGS

Source: -

- (i) UNWTO Tourism Market Trends 2007 Edition, for the years upto 2005
- (ii) UNWTO Barometer June 2009 for 2006 & 2007
- (iii) UNWTO Tourism Highlights 2011 Edition for 2008 and 2012 Edition for 2009.
- (iv) UNWTO Barometer April 2014 for 2010, 2011 & 2012
- (v) UNWTO Barometer August 2015 for 2013
- (vi) UNWTO Barometer May 2016 for 2014 & 2015

TABLE-5

COMPETITORS FOR INDIAN TOURISM INDUSTRY IN TERMS OF FEE's

Rank	Country	International Tourism Receipts in US\$ billion	Percentage (%) Share
1	USA	178.3	14.47
2	China	114.1	9.26
3	Spain	56.5	4.59
4	France	45.9	3.73

5	Thailand	44.6	3.62
6	UK	42.4	3.44
7	Italy	39.7	3.22
8	Germany	36.9	3
9	Hong Kong (CHINA)	35.9	2.91
10	Macao (China)	31.3	2.54
14	India	21.07	1.62
Total of Top 10 countries		625.6	50.78
Others		586.4	47.6
Total		1232	100

Source: Bureau of Immigration, India

Figure- 12



Figure-13

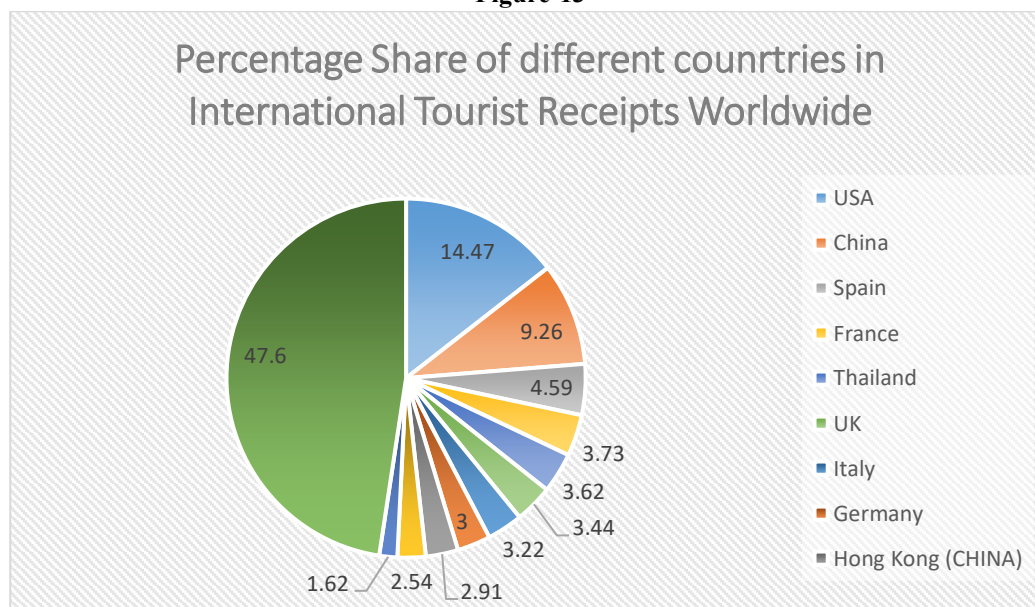


EXHIBIT-8

INVESTMENTS

according to the report released by Department of Industrial Policy and Promotion (DIPP), the tourism and hospitality sector is among the top 10 sectors in India to attract the highest Foreign Direct Investment (FDI).

With the rise in the number of global tourists and realizing India's potential, many companies have invested in the tourism and hospitality sector. Some of the recent investments in this sector are as follows:

- The first Incredible India Tourism Investment Summit 2016, which was organized from September 21-23, 2016, witnessed signing of 86 Memoranda of Understanding (MoUs) worth around Rs 15,000 crore (US\$ 2.24 billion), for the development of tourism and hospitality projects.
- The Ministry of Tourism has approved projects worth Rs 450 crore (US\$ 67.10 million) under the Swadesh Darshan scheme, for the improvement and creation of tourism infrastructure in Madhya Pradesh, Uttarakhand, Tamil Nadu, Uttar Pradesh and Sikkim.
- Accor Hotels, Australia's largest hotel operator has entered into an agreement with the Australia India Travel & Tourism Council (AITTC) with a view to strengthen and promote tourism between Australia and India.
- Global hospitality major Carlson Rezidor Hotel Group, which is also the largest foreign hotel brand in India by number of hotels, plans to increase its total count to 120 hotels in India by 2020.
- Marriott International Inc, the US-based hotel chain, is now looking for expanding its operations in North India, including prominent cities in Uttar Pradesh like Kanpur, Varanasi and Agra.
- Steigenberger Hotels, a German luxury hotel company, and MBD Group, a Delhi-based firm which runs 5-star Radisson Hotels in Noida and Ludhiana, have formed a joint venture to build five luxury hotels and manage another 15 luxury hotels in India by 2030.
- Keys Hotels, a premium brand of Berggruen Hotels, plans to launch three new hotels in India at Vishakhapatnam, Calicut and Jaipur, and further add up to 10 Keys Hotels in the country by the end of FY 2017.
- Stayzilla, a budget hotels and homestays aggregator, has raised over US\$ 13 million in Series C round of funding from Matrix Partners and Nexus Ventures, which will be used to improve product, technology and marketing initiatives for its alternate stay business.
- Travel Tripper, a US-based hotel technology firm, has entered the Indian market by setting up its second global delivery centre outside the US in Hyderabad, which will serve as a development and client service centre for the company's worldwide operations.
- Indian Railway Catering and Tourism Corporation (IRCTC) has partnered with OYO Rooms, India's largest branded network of hotels, to provide standardized accommodation options to train travelers through its convenient booking platform.
- Ctrip.com, China's largest travel portal, has bought a stake in India's largest travel portal MakeMyTrip for US\$ 180 million via convertible bonds, which allows Ctrip to increase its share in MakeMyTrip up to 26.6 per cent.
- Global investment banking major Goldman Sachs has invested Rs 441 crore (US\$ 65.76 million) to acquire an equity stake in Gurgaon-based hotel development and investment start-up SAMHI Hotels which will help fund SAMHI's expansion plans.
- Thai firm Onyx Hospitality and Kingsbridge India hotel asset management firm have set up a joint venture (JV) to open seven hotels in the country by 2018 for which the JV will raise US\$ 100 million.
- Goldman Sachs, New-York based multinational investment banking fund, has invested Rs 255 crore (US\$ 38.02 million) in Vatika Hotels.

GOVERNMENT INITIATIVES

The Indian government has realized the country's potential in the tourism industry and has taken several steps to make India a global tourism hub. Some of the major initiatives taken by the Government of India to give a boost to the tourism and hospitality sector of India are as follows:

- The Union Cabinet has approved a MoU between India and South Africa, aimed at expanding bilateral cooperation in the tourism sector through **exchange of information and data**, establishing exchange programs and increasing investments in the tourism and hospitality sector.
- The Ministry of Tourism plans to revise its guidelines to exempt homestays from service tax or commercial levies and make their licensing process online, which is expected to encourage people to offer homestays to tourists.
- The Union Cabinet has approved the signing of Memorandum of Understanding between the Ministry of Tourism of India and the Ministry of Trade Industry and Tourism of Colombia to boost cooperation in the field of tourism between the two countries.
- The Central Government has given its approval for signing of a MoU between India and Cambodia for cooperation in the field of tourism with a view to promote bilateral tourism between the two countries.
- The Heritage City Development and Augmentation Yojana (HRIDAY) action plans for eight missions' cities including Varanasi, Mathura, Ajmer, Dwaraka, Badami, Vellankini, Warangal and Amaravati have been approved by HRIDAY National Empowered Committee for a total cost of Rs 431 crore (US\$ 64.27 million).
- Government of India plans to **cover 150 countries under e-visa scheme** by the end of the year besides opening an airport in the NCR region to ease the pressure on Delhi airport.
- Under '**Project Mausam**' the Government of India has proposed to **establish cross cultural linkages and to revive historic maritime cultural and economic ties with 39 Indian Ocean countries.**

Initiatives to Promote Adventure Tourism

- As per the policy for the diversification of tourism product of India, special attention is being given for the development of Adventure Tourism in the country. The Ministry of Tourism has issued Guidelines for Approval of Adventure Tour Operators, which is a voluntary scheme, open to all bona fide adventure tour operators. The Ministry of Tourism has also formulated a set guideline on Safety and Quality Norms on Adventure Tourism as basic minimum standards for adventure tourism activities. These guidelines cover Land, Air and Water based activities which include mountaineering, trekking, hand gliding, paragliding, bungee jumping and river rafting.

Central Financial Assistance is being extended to various State Governments/ Union Territory Administrations for development of Tourism Infrastructure in destinations including Adventure Tourism destinations. These include facilities for trekking, rock climbing, mountaineering, aero-sports, winter/water related sports, trekker huts, wildlife viewing facilities, etc. Financial assistance for purchase of water sports equipment consisting of kayaks, canoes, paddle boats, fibred glass boats, hovercrafts, water scooters, etc. is also provided to state governments. Special efforts are made by the Ministry of Tourism to promote Inland Water Tourism by providing necessary infrastructural facilities. Financial assistance was extended for construction of Double Hull Boats, construction of Jetties, Cruise Vessels, Boats, etc.

The National Institute of Water Sports, another organization of Ministry of Tourism based in Goa, is getting a new building and facilities upgraded for training in water sports activities.

The Ministry is working with the Indian Mountaineering Federation and Adventure Tour Operators Association of India to explore positioning India as an Adventure Destination. To enhance the quality of adventure Tourism experience in the country, the Ministry of Tourism has given 'in principle' approval to Indian Mountaineering Federation to organize training programs for Adventure and Mountain Guides under the Capacity Building for Service Providers (CBSP) scheme of Ministry of Tourism. Ministry of Tourism has been following up with concerned central ministries about facilitation for development of adventure tourism. As an outcome, the Government of India has given

security clearance for opening of 104 additional peaks in Jammu & Kashmir (Leh Area) subject to stipulations and clearances from State Govt., Home Ministry and other concerned agencies. The opening of the additional peaks will help in positioning the Indian Himalayas as Adventure tourism destination. Similarly, the Ministry of Tourism had also taken the issue regarding use of GPS and Satellite phone by the bonafide adventure tour operators to ensure that the safety standards are of international standards.

Promotion of Camping sites has been encouraged to give a distinct experience to the discerning travelers. Ministry of Tourism has sanctioned Rs. 3.61 crore for development of Camping sites at Surajkund area and Rs. 3.20 crore at Dharuhera. The Camping huts were erected with State-of-the-Art technology.

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