

# Tourism sector profile

## India Scenario



# Sector Overview (1 / 2)

## Seventh largest tourism economy in the world

2017

USD 234  
billion

Total contribution of Travel & Tourism to GDP, contributing 9.4% to India's GDP

41.62  
million

Job contribution of Travel & Tourism sector, accounting for 8% of total employment

USD 41.6  
billion

Investments in Travel & Tourism sector

2028 (Est.)

USD  
492.2  
billion

Total contribution of Travel & Tourism to GDP, contributing 9.9% to India's GDP

52.28  
million

Job contribution of Travel & Tourism sector, accounting for 8.4% of total employment

USD 85.2  
billion

Investments in Travel & Tourism sector

# Sector Overview (2/2)

## Travel & Tourism

### Direct

Accommodation, Transportation, Attractions, Food & Beverage services, Cultural, sports & recreational services, Retail Trade

**39%**

Contribution by direct services to sector GDP in 2017

**63%**

Contribution by direct services to sector employment in 2017

### Indirect

Government spending, Private spending, Foreign investment, Supplier purchases

**50%**

Contribution by indirect services to sector GDP in 2017

**24%**

Contribution by indirect services to sector employment in 2017

### Induced

Food & Beverages, Recreation, Clothing, Housing, Household goods

**11%**

Contribution by induced services to sector GDP in 2017

**13%**

Contribution by induced services to sector employment in 2017

# Tourist Arrivals

10.18  
million

Foreign Tourist Arrivals (FTAs) in 2017 registering a growth of 15.6% over previous year

17.30  
million

Estimated FTAs by 2027

USD  
27.69  
billion

Foreign Exchange Earnings (FEEs) from tourism in 2017, registering a growth of 20.8% over previous year

1.7  
million

No. of foreign tourists arrivals on e-Tourist Visa in 2017 registering a growth of 57.2% over 2016



# Government of India Initiatives

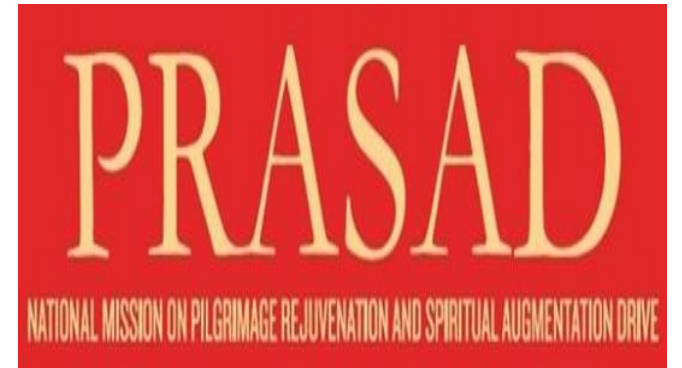
## National Heritage City Development and Augmentation Yojana (HRIDAY)

- Focus on holistic development of heritage cities
- Supports development of core heritage infrastructure projects such as revitalization of urban infrastructure for areas around heritage assets



## Pilgrimage Rejuvenation And Spiritual Augmentation Drive (PRASAD)

- Identify and develop pilgrimage tourist destinations basis high tourist visits, competitiveness and sustainability in an integrated manner to enrich religious/spiritual tourist experience and enhance employment opportunities



## National Tourism Policy 2002

- Positioning tourism as a major engine of economic growth and to harness its direct and multiplier effects for employment and poverty eradication in an environmentally sustainable manner

# Tamil Nadu scenario

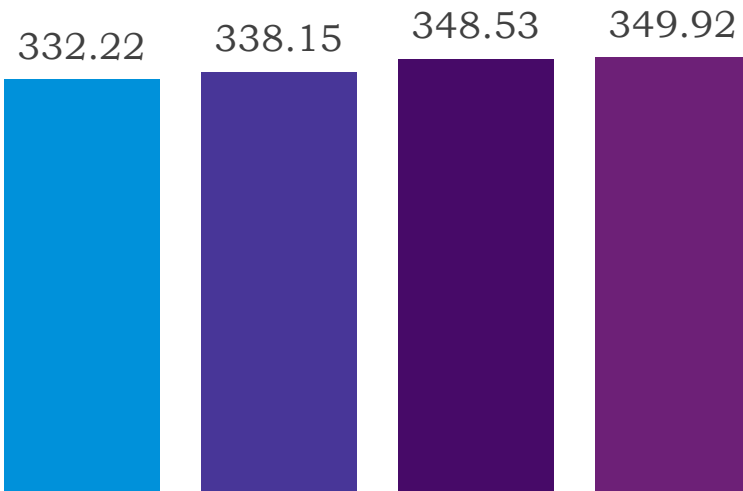


# Sector Overview (1/2)

The state ranks 1<sup>st</sup> in the number of Foreign and Domestic tourist arrivals in India

## Steady increase in Tourist Arrivals

Tourist Arrivals (millions)



Total

■ 2014 ■ 2015 ■ 2016 ■ 2017



# UNESCO World Heritage Sites

Home to 5 UNESCO World Heritage Sites in India; highest amongst all the states

DARASURAM



MAMALLAPURAM



THANJAVUR – BIG TEMPLE



GANGAIKONDA CHOLAPURAM



NILGIRI'S MOUNTAIN RAIL





# Types of tourism

Religious Tourism



Leisure Tourism



Wildlife Tourism



Beach Tourism



Fine arts & Cultural Tourism



Medical Tourism



# Religious Tourism

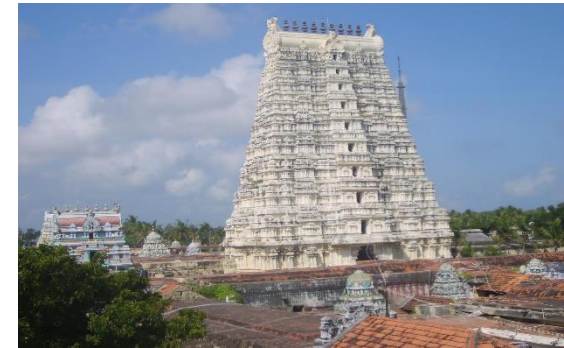


## Meenakshi Temple, Madurai

- Spread over an area of 65,000 sq. mtr.
- The architectural excellence of the Hall of Thousand Pillar is that the pillars viewed from any angle will be on a straight line
- The musical pillars carved out of stone decorate the corridors of the outer courts

## Ramanathaswamy Temple, Rameswaram island

- Rameswaram is a small Island in the Gulf of Mannar
- Temple is well-known for its architectural beauty of magnificent Prakaras or corridors with massive sculptured pillars on either side
- Special Pooja is performed every day to the Spatikalingam [crystal lingam] installed by Adi Sankara in this temple



## Nagore Dargah, Nagapattinam

- Dedicated to Meera Shahib Abdul Qadir Hajrath Shahul Hamid Badshah and established in an area of 5 acres with four impressive entrances on all four directions
- The 131 ft tall Minaret called 'Periya Minara' was built by the Thanjavur King Pratap Sing in the 18th Century

# Leisure Tourism



## Ooty (Udhagamandalam)

- Located in the Western Ghats zone at an altitude of 2240 mtrs.
- It is the headquarters of the Nilgiri District, where the two mountain ranges meet
- Coffee and Tea Plantations and trees like Conifers, Eucalyptus, Pine and Wattle dot the hill side and its environs

## Kodaikanal

- Exotic location at 7000 feet above the Plains
- The meadows, long stretch of forests, Woods slopes, mighty rocks, bowers, creeks and slopes charms the tourists
- Kodaikanal is famous for the kurinji – flowers that blossom once in twelve years



## Yelagiri Hill

- Situated at 1410 meters altitude amidst four mountains, and one of the most popular hill stations of Tamil Nadu
- The highest point is the Swamimalai Hill, standing tall at 4,338 ft and a popular destination for trekkers

# Wildlife Tourism



## Mudumalai Wildlife Sanctuary

- Located in an area of 321 sq. kms. and at an elevation of 1140 mts at the tri-point junction of the States of Tamil Nadu, Kerala & Karnataka
- Exciting place to see Tiger, Panther, Elephant, Gaur, Sloth bear, Sambar, Barking Deer, Blackbuck, Malabar Giant Squirrel, Four-horned Antelope, Striped Hyena, Small Indian Civet, Wild Boar, Porcupine, etc.

## Gulf of Mannar Marine National Park

- Spreads along 560 Km stretch between Rameswaram and Tuticorin in an area of 10,500 sq. km.
- Among the Gulf's 3600 plant and animal species, there are globally endangered species of Sea Cow (Dugong) and six mangrove species endemic to peninsular India



## Kalakkadu Sanctuary

- It is the 17<sup>th</sup> Tiger Reserve in India and the only one in Tamil Nadu, located in an area of 900 sq. km.
- Animals spotted are Tiger, Panther, Jackal, Wild dogs, King-cobra, Python and several other snakes

# Beach Tourism



## Marina Beach, Chennai

- A beautiful and mesmerizing 13 km stretch of beach making it the second longest beach of the world
- Activities range from sun rise; beach games; a pony ride to tasting mouth watering local delicacies

## Mamallapuram Beach

- Situated 60 Km south of Chennai City
- It is known especially for its Temples in the form of Chariots called rathas, mandapams (cave sanctuaries), huge open-air reliefs and the temple of Rivage, long and beautiful sea shore



## Kanyakumari Beach

- Also called as 'KODDAL' – the Confluence of three oceans Bay of Bengal, Arabian Sea and Indian Ocean
- It is the only place in India where one can enjoy the unique spectacle of Sunset and Moonrise simultaneously on full moon days

# Fine Arts & Culture Tourism



## Bharatanatyam

- One of the oldest form of dance in India
- UG and PG courses are offered in some of the major universities to develop the art of Bharatanatyam

## Thyagaraja Music Festival

- An eight-day music festival, the Thyagaraja Aradhana, is held every year in January in Thiruvaiyaru, situated 13 kms from Thanjavur
- This Carnatic Music festival attracts music lovers from all corners of the country



## Folk Dance

- Literature called as Iyal, Music called as Isai and Dance or Drama called as Nadagam are the three broad classifications of Art and Entertainment
- These are not choreographed but performed at social functions by people with or without training, generally vernacular, very often accompanied by traditional and locally or regionally practiced instrument[s] based music

# Medical Tourism

## Advantage Tamil Nadu

- International Standard Hospitals such as Apollo Hospitals, Fortis, Max, Escorts, Wockhardt, Sterling, Sankara Nethralaya and Agarwal Eye hospitals
- Departmental experts & Specially qualified Medical Practitioners
- Reduced costs & availability of latest Technologies
- Emergency treatment or treatment at short notice
- Availability of Linguistic interpreters



# Sector growth enablers

Home to many international and national hotels

Hilton Hotel

ITC Grand Chola

Taj

Le Royal Meridian

Hyatt Regency

Accord Metropolitan

Trident

Radisson Blu

The state has a well-connected road, rail, airport and port infrastructure

## Cuisine

- Tamil Nadu Cuisine comprises of pre-dominantly Rice Oriented Dishes
- Locally available Grains, Lentils, Vegetables and variety of aromatic Spices add Flavor, Taste and Aroma to the recipes of the land





# Investment opportunities

**Setting up  
Hotels and  
Resorts**

**Setting up  
Recreational  
activities on  
beaches**

**Setting up of  
multi-cuisine  
restaurants**

**Thank you**