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## **Preparation of Goa's Tourism Master Plan and Policy**

### **Module 1 Report:**

**Current and projected tourism  
scenario in Goa and understanding  
of key gaps**

**Department of Tourism, Government of  
Goa**

October 2015

Goa



# Disclaimer

- This presentation is being made to Department of Tourism, Govt. of Goa ('DoT') as part of the 'Module 1 Report' for our engagement of assisting DoT in the "Preparation of the Tourism Master Plan and Policy for Goa".
- This report (or part thereof) is a draft version and may be revised, updated or reworked. This report should be understood as the final report only after suggested changes, if any, is incorporated into the report.
- Collection of data has been limited to such information as can be collected from resources on the published public domain and meetings with market participants in each of the locations. Wherever information was not available in the public domain, suitable assumptions were made to extrapolate values for the same.
- The report may contain KPMG's analysis of secondary sources of published information and incorporates the inputs gathered through meetings with industry sources. Where, for reasons of confidentiality, the industry sources cannot be quoted in this document, these are not attributed to the industry source. While information obtained from the public domain has not been verified for authenticity, we have obtained information, as far as possible, from sources generally considered to be reliable.
- Our analysis is based on the prevailing market conditions and regulatory environment and any change may impact the outcome of our review
- We have indicated in this report the source of the information presented. Unless otherwise indicated, we have undertaken no work to establish the reliability of those sources or to evidence independence of the relevant source.
- Wherever our report makes reference to 'KPMG/T&L/KPMG and T&L Analysis', it indicates that we have (where specified) undertaken certain analytical activities on the underlying data to arrive at the information presented; we do not accept responsibility for the underlying data. Wherever information was not available in the public domain, suitable assumptions were made to extrapolate values for the same.
- We must emphasize that the realization of the prospective data and financial information set out within our report (based on secondary sources, as well as our internal analysis), is dependent on the continuing validity of the assumptions on which it is based. The assumptions will need to be reviewed and revised to reflect such changes in business trends, cost structures or the direction of the business as further clarity emerges. We accept no responsibility for the realization of the prospective financial information. Our inferences therefore will not and cannot be directed to provide any assurance about the achievability of the projections. Since the projections relate to the future, actual results are likely to differ from those shown in the prospective financial information because events and circumstances frequently do not occur as expected, and differences may be material. Any advice, opinion and / or recommendation indicated in this document shall not amount to any form of guarantee that KPMG has determined and/ or predicted future events or circumstances.

## Module Coverage as per RFP (1/4)

| Sr. No.  | Module 1 task as described in the RFP  | Coverage Sections and Methodology adopted for report  |
|--|--|---|
| <b>Review of the current tourism scenario in Goa</b> |  | <b>Demand Analysis, Value Chain Analysis, Asset Analysis</b>  |
| 1.1  | A comprehensive outline/description of the of the current state of Goa Tourism, its assets, infrastructure, places of tourist interest and traffic, financial and expenditure trends with proper statistics based on surveys and market research.  | Primary research through site visits and stakeholder interactions – public and private sector; and secondary research through the Goa tourist map, the websites of Government of Goa entities, tourists guides of Goa, tourism trade business websites and other tourism international guides.            |
| 1.2  | Provide an up to date overview of the tourism scenario in Goa including current prospects future possibilities in the growth of the Industry in a sustainable manner. The overview should cover type of visitors to the state; nature and duration of stay, average spending, spending patterns, break up of visitor arrivals, purpose of visit, transportation types, visitor profile, type of activities preferred, etc. | This has been conducted based on interactions and statistics from Government of Goa officials; Ministry of Tourism, Government of India publications; publications from international agencies in the tourism sector – UNWTO, WTTC, WTM, WEF, ITB Berlin and other reports available in the public domain |
| 1.3  | Perform a SWOT analysis of Goa Tourism including identifying competitive advantage and strengths of Goa tourism and the shortfalls and product weaknesses.   | This has been done for the key elements of the tourism value chain including tourism assets, and major elements of core and support tourism infrastructure based on data procured from primary and secondary research elaborated above.   |
| 1.4  | Review existing documentation, current plans, schemes, strategies and programs related to the tourism development.   | Review of these elements has been basis primary interactions and data from the DoT, GTDC, other Government of Goa entities; news reports and tourism & leisure publications.  |



## Module Coverage as per RFP(2/4)

| Sr. No. Module 1 task as described in the RFP  | Coverage Sections and Methodology adopted for report   |
|--|--|
| Review of the current tourism scenario in Goa  | Tourism Value Chain Analysis, Tourism Trends   |
| 1.5 Outline key priorities for Goan tourism Industry for the next 25 years set out as short term, medium and long term priorities, and identify and map an inventory of all existing tourism and recreation assets.  | Tourism assets have been identified from site visits; travel and tourism news, reports and publications; tourist trade and Government official interactions.         |
| 1.6 Review of basic infrastructure, connectivity, urban basic services, telecom, transport, solutions, solid waste management and sewage and to suggest ways and means for improvement of standards for environmental and infrastructure upgradation of the State. | This has been conducted through; travel and tourism news, reports and publications; tourist trade and Government official interactions.                              |
| 1.7 Review the existing tourism infrastructure available at the various tourist identified destinations and nodes as well as road and wayside amenities.   | This has been conducted through; travel and tourism news, reports and publications; tourist trade and Government official interactions.                              |
| 1.8 Enumerate various projects within the sustainability paradigm to increase tourism, while maintaining the ecological, psycho-social balance and economic integrity of Goan land and society.  | This has been conducted through field visits; travel and tourism news, reports and publications; interactions with tourist trade personnel and Government officials. |
| 1.9 Study the existing and forecast likely future patterns of tourism, themes, and the tourism market trends.  | This has been done based on the as is analysis of Goa tourism taking into account international trends and best practices in sustainability.                         |

## Module Coverage as per RFP(3/4)

| Sr. No. Module 1 task as described in the RFP   | Coverage Sections and Methodology adopted for report   |
|---|--|
| <b>Review of the current tourism scenario in Goa</b>  | <b>Scenario Analysis, Tourism sustainability, Tourism contribution to Goa</b>  |
| 1.10 Based on current trends of tourist arrivals project both foreign and domestic tourist arrivals for the coming 25 years, tourist expenditure, key requirements or tourists and potential impact of tourism on the environment and socio economic milieu | This has been done based on the as is analysis of Goa tourism, interactions with national and overseas tourist trade personnel and publications from leading international agencies in the tourism sector – UNWTO, WTTC, WTM, WEF, ITB Berlin and other reports available in the public domain |
| 1.11 Outline the benchmarks for green norms, sustainable and responsible tourism paradigms, environmental protection, waste management, essentials like water supply, energy, sanitation and infrastructural requirements to ensure connectivity,           | Details of various certifications and two case studies citing role of various institutions in developing sustainable tourism.  |
| 1.12 Identify the current and projected socio economic and environment impact of tourism industry in the state.   | This has been done based on the as is analysis of Goa tourism, interactions with national and overseas tourist trade personnel and publications from leading international agencies in the tourism sector – UNWTO, WTTC, WTM, WEF, ITB Berlin and other reports available in the public domain |

## Module Coverage as per RFP(4/4)

| Sr. No.             | Module 1 task as described in the RFP  | Coverage Sections and Methodology adopted for report   |
|---------------------|--|--|
| <b>Gap Analysis</b> |  | <b>Tourism Value chain analysis, Asset Analysis</b>  |
| 2.1                 | Identify gaps in physical Infrastructure.  | This has been done based on the as is analysis of Goa tourism taking into account international trends and best practices in green tourism.                          |
| 2.2                 | Review support infrastructure including transport networks, connectivity, banking, tour operators, training facilities and other support facilities  | This has been conducted through field visits; travel and tourism news, reports and publications; interactions with tourist trade personnel and Government officials. |
| 2.3                 | Based on the inventory, conduct an analysis that identifies Strengths, Weaknesses, Opportunities and Threats (SWOT) as well as gaps. This analysis shall include but not limited to the labour force, infrastructure, capacity and accessibility in order to assess actionable tourism opportunities | SWOT analysis for demand,connectivity,marketing and tourism assets have been described in the report.  |
| 2.4                 | Generate tourism opportunity profiles building on the inventory with the end goal being a report to identify the State's assets and potential opportunities for tourism and possible circuits followed with detailed analysis in Module 2  | This has been conducted through field visits; travel and tourism news, reports and publications; interactions with tourist trade personnel and Government officials. |
| 2.5                 | Collect data on tourist opinions and expenditures including an in-depth understanding as to why tourists visit Goa's different places/destinations and what types of attractions would draw their interest   | This has been conducted through field visits; travel and tourism news, reports and publications; interactions with tourist trade personnel and Government officials. |

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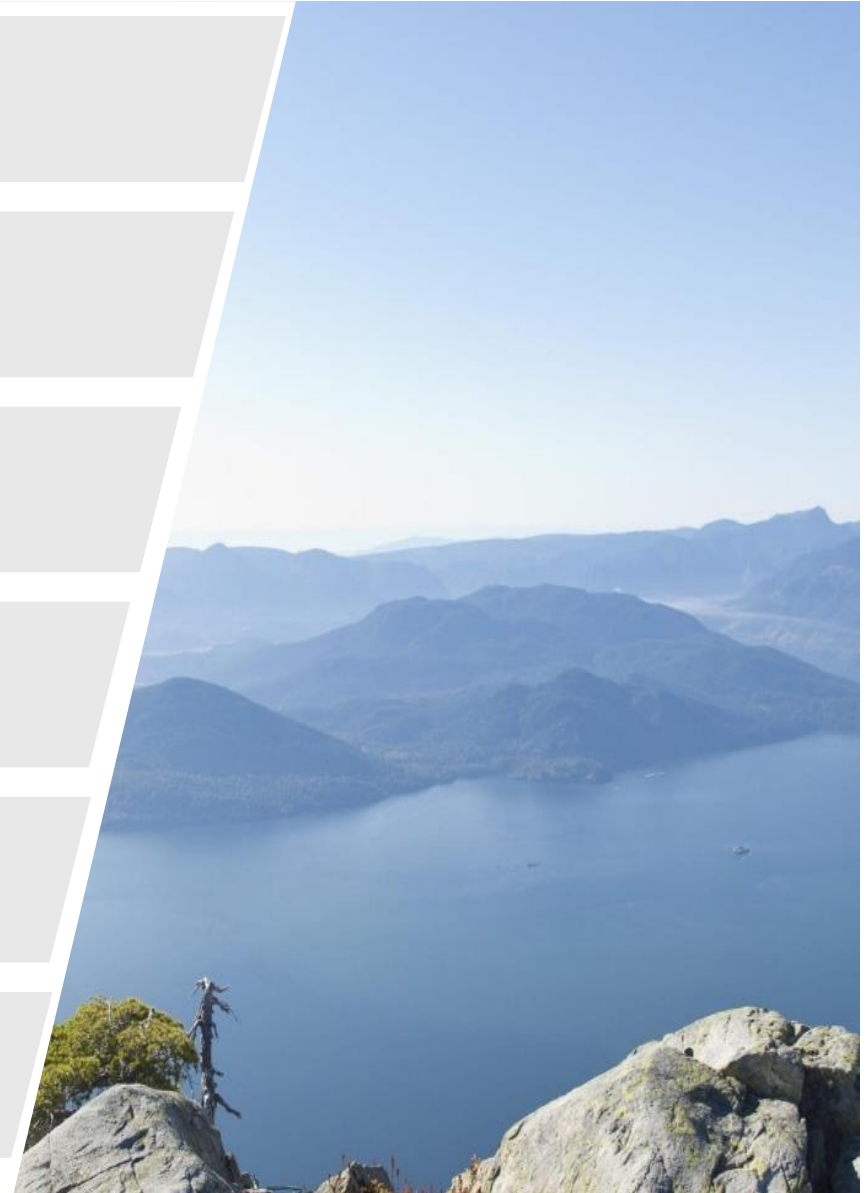
**Sustainability and  
Benchmarking**

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**Revised timelines and  
go ahead for Phase 2**





# Demand Analysis- Goa Tourism

- Inbound Tourism Statistics
- Distribution of accommodation infrastructure
- International and Domestic Tourist Profiling
- SWOT



# Demand Analysis

## Inbound Tourist Arrivals

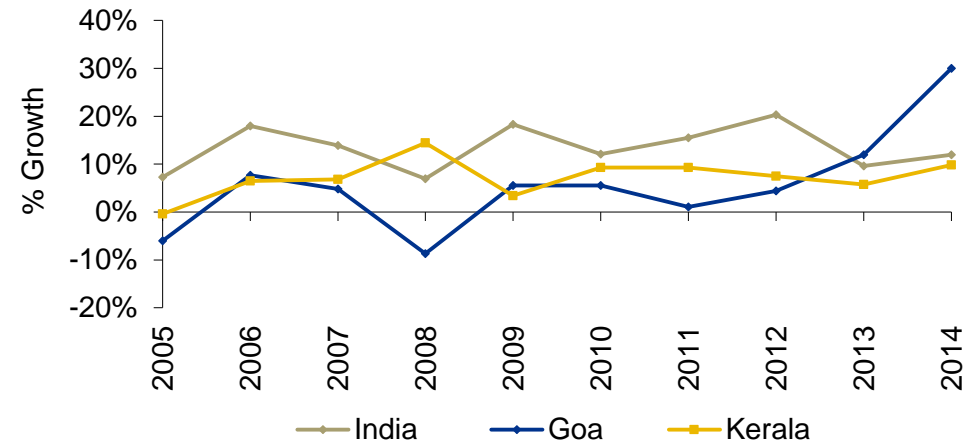
### Y-o-y growth and statistics (Goa)

- With around **41 lakh** tourists, **2014** saw the **largest y-o-y growth (30%)** in terms of total tourist arrivals since 1985
- 2014 was also the first year since 2005 where the proportion of Goa to Kerala tourists significantly increased- from **27% in 2013** to **32% in 2014**

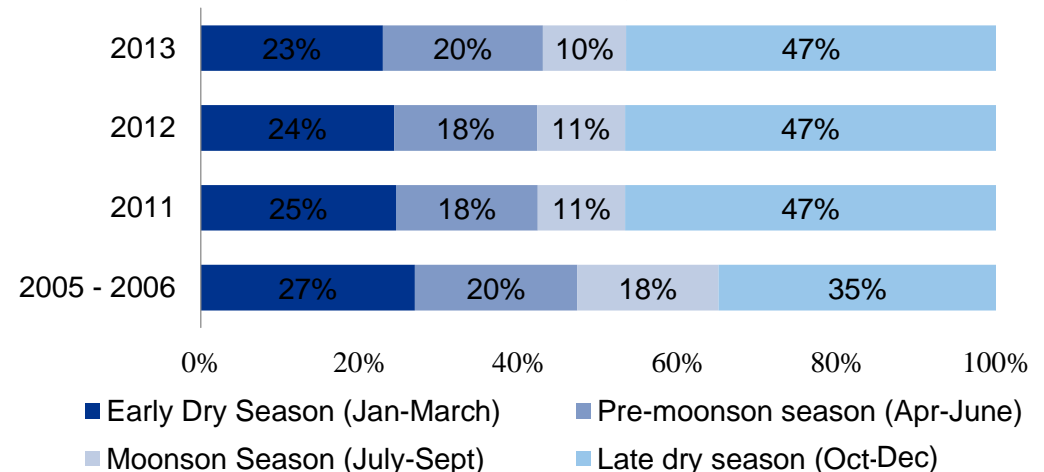
### Seasonality trends

- Arrivals in the Oct-Dec period have significantly increased from **35% to 47%** from **2005 to 2014**. Part of this increase is explained by the large proportion of mega events held in the period
- Arrivals in the monsoon season have significantly reduced, despite the increased focus on MICE tourism during the monsoon. This demonstrates significant potential to attract more tourists during this period

Tourist arrivals (% Growth)



Tourism Seasonality Distribution



# Demand Analysis

## International Tourist Arrivals

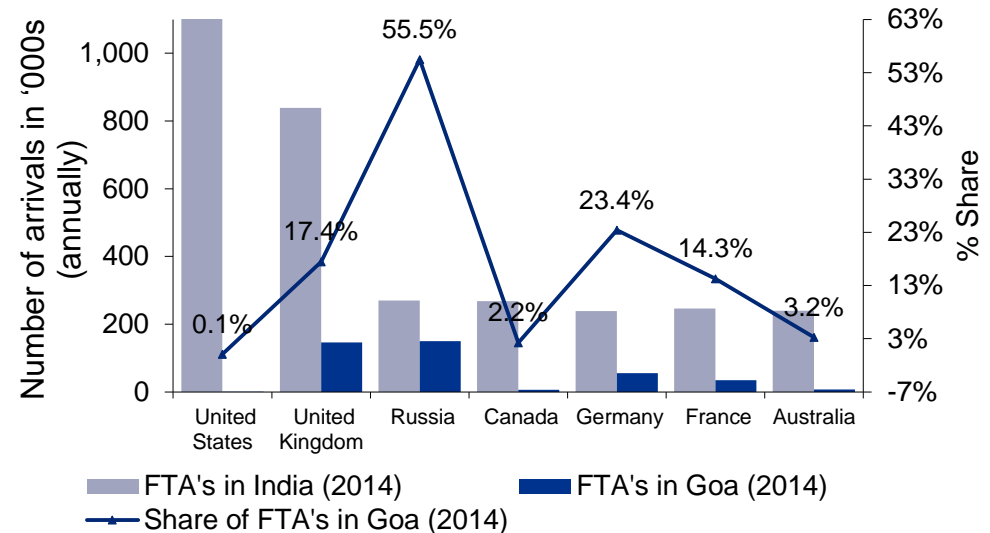
### Key statistics

- Goa's market share of all FTAs to India was **6.7% in 2014**
- Goa attracts 23.4% and 17.4% of FTA's travelling to India from Germany and UK respectively
- Russians constituted 29% of all FTAs travelling to Goa which represents 56% of all Russians FTAs travelling to India in 2014

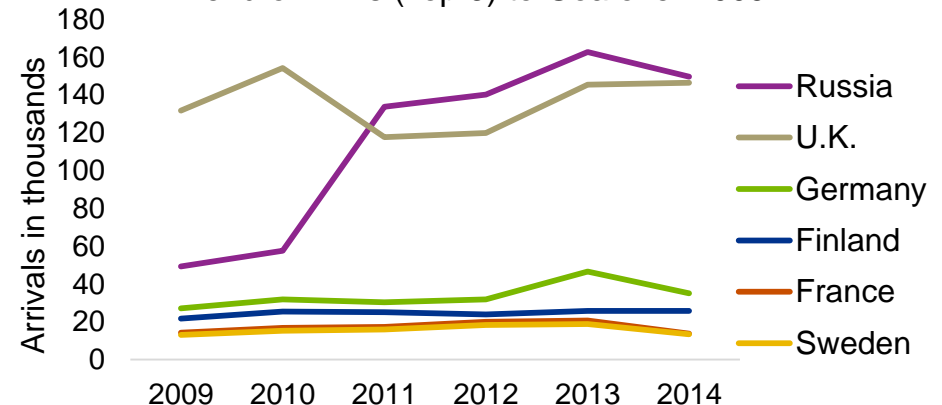
### Analysis

- UK** tourists comprised a majority of FTA's to Goa till 2010, but have since been overtaken by Russian FTAs. The key reasons for the decline, as per industry stakeholders, include poor infrastructure, high season prices and lack of garbage management. No consistent growth trend is observed
- Russian** FTAs have shown sharp growth in the 2009-2013 period, mainly driven by the introduction of several new charter connections. However, economic issues in Russia have caused a decline in 2014
- Germany** was also a large contributor to tourist numbers in the early 2000s. However, German tourists have also decreased due to reasons similar to that of the decline in UK tourists.

Goa's share in key FTA markets



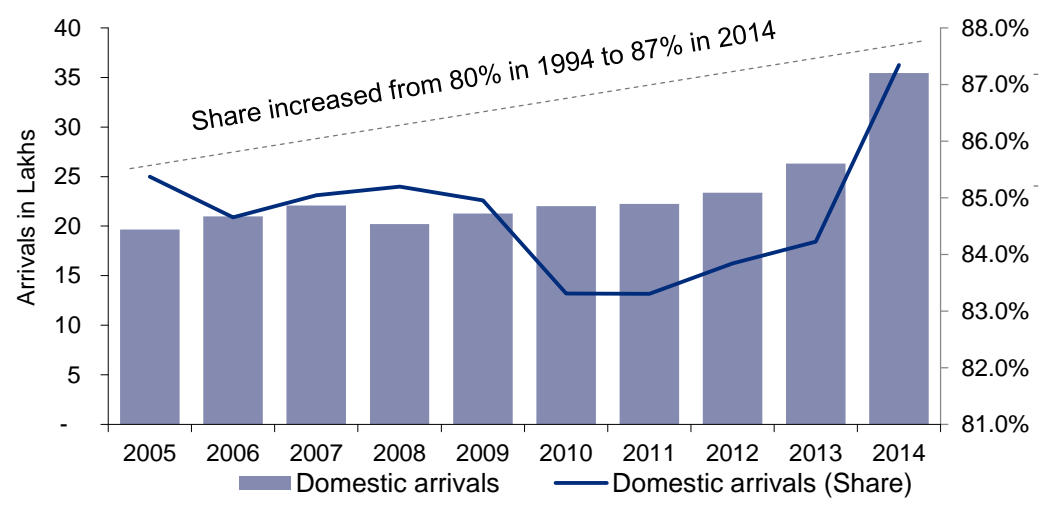
Trend of FTAs (Top 5) to Goa over 2009-14



# Demand Analysis

## Domestic Tourist Arrivals

Domestic tourist arrivals in Goa as a % of total tourist arrivals



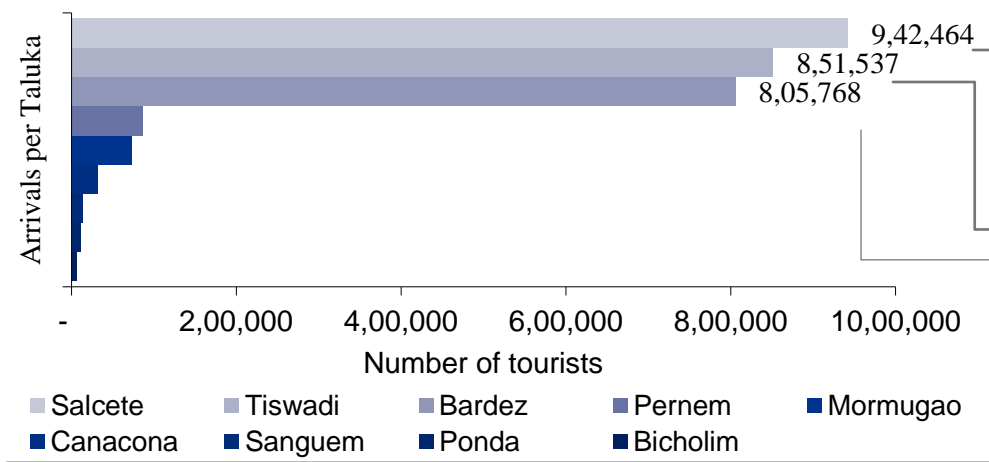
**Better connectivity** leading to increased short stay trips

Availability of **MICE & Wedding facilities** (though limited) has led to increased tourist arrivals

**Gaming facilities** have become a primary attractor amongst some domestic tourists

Increased room supply leading to **low increases** in hotel room rates- more affordability

Tourist Arrivals – Taluka wise density



**Salcette** -Presence of the beaches as well as it being a commercial hub. e.g. – Colva, Benaulim and Majorda

**Tiswadi** -Presence of the State capital (Panaji), Basilica of Bom Jesus (a UNESCO World Heritage Site), gaming and other shopping avenues

**Bardez** –Presence of a vibrant nightlife, water sports, roadside shopping and beaches e.g. Baga, Anjuna, Candolim, Calangute, Sinquerim and Vagator

## Demand Analysis

### Tourist profiling by mode of travel to Goa - Air and Road (Bus)

Domestic market profiling by mode of transport through statistics on air and bus travel was performed to serve as pointers for domestic source markets

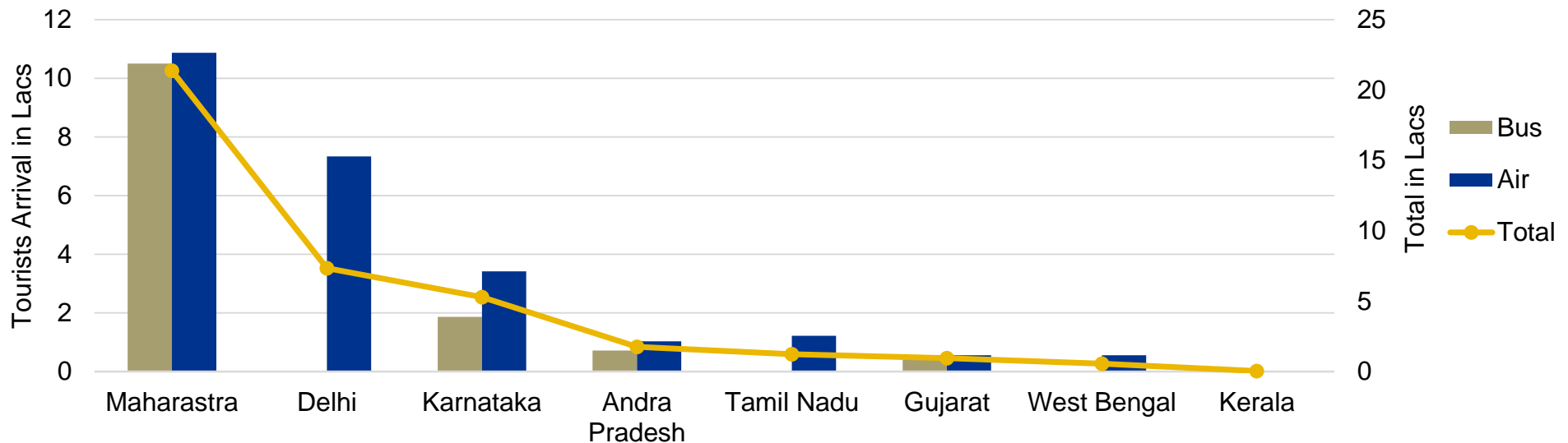
#### **Bus – 13.5 lakh tourists**

- Maharashtra - 78%
- Karnataka - 14%

#### **Air – 25 lakh passengers (tourist breakup not available)**

- Mumbai - 44%. However, data segregating passengers using Mumbai as a hub is not available
- Delhi - 29%
- Karnataka-14%

**Domestic tourists split by mode of travel-bus/ air**



Estimations based on market data : Bus (Online bus aggregator-redbus.in); Air- Flight schedules,AAI and Dabolim airport data.



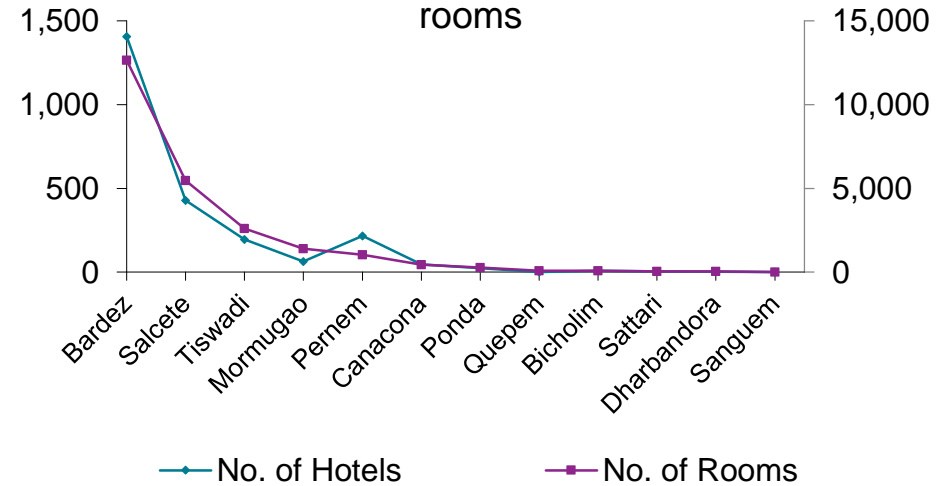
# Demand Analysis

## Availability of accommodation infrastructure

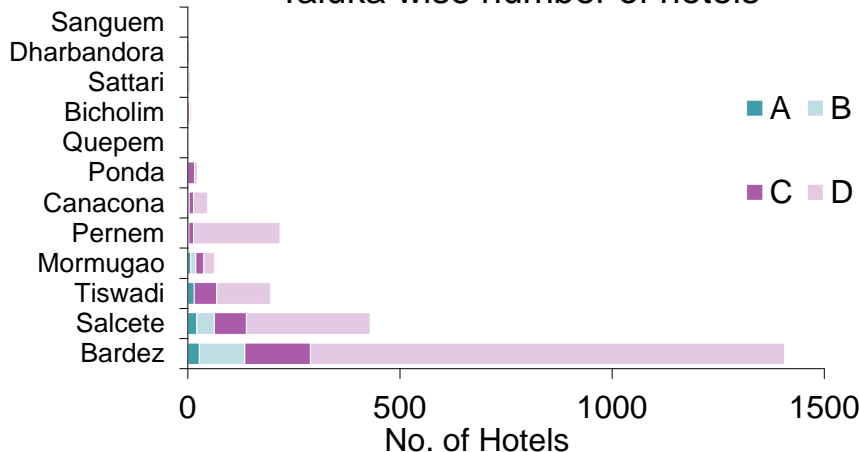
### Hotel Distribution across Goa

- Most of the accommodation supply is concentrated towards North Goa, particularly in Bardez and Tiswadi talukas due to the higher demand from tourists
- The demand in the South Goa is catered to by hotels mostly concentrated in Salcete and Mormugao talukas

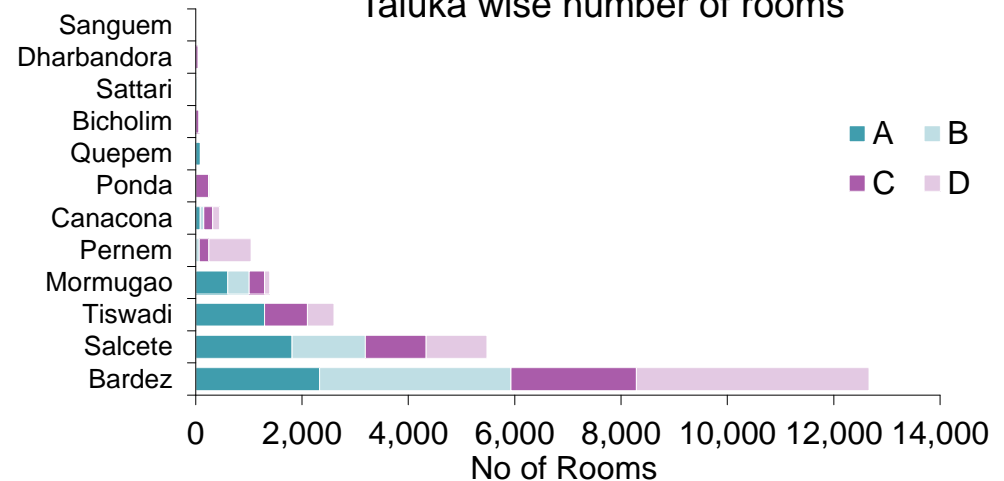
Taluka wise distribution of hotels and rooms



Taluka wise number of hotels



Taluka wise number of rooms



# Demand Analysis

## SWOT Analysis

### Strengths

High recognition and recall of 'Brand Goa'

Variety of unique tourism products

Facilities (though limited) for MICE and wedding guests

Good domestic air connectivity and improving international air connectivity

### Weakness

Higher seasonality of tourist arrivals

Low per capita expenditure by a section of in-bound tourists

Limited scope for increased flight connections at convenient times

### Opportunities

European tourists using the direct connectivity from the Middle East

Promoting tourist arrivals from Canada and USA as their arrival numbers are high in India but low for Goa

Eco-tourism, experiential, and wellness tourists

### Threats

Increasing popularity of competing tourism destinations

**International** - Sri Lanka, Thailand, Singapore and Dubai

**Domestic**- Kerala, Karnataka and Maharashtra

High travel and accommodation rates during peak season

Unpredictability of charter business

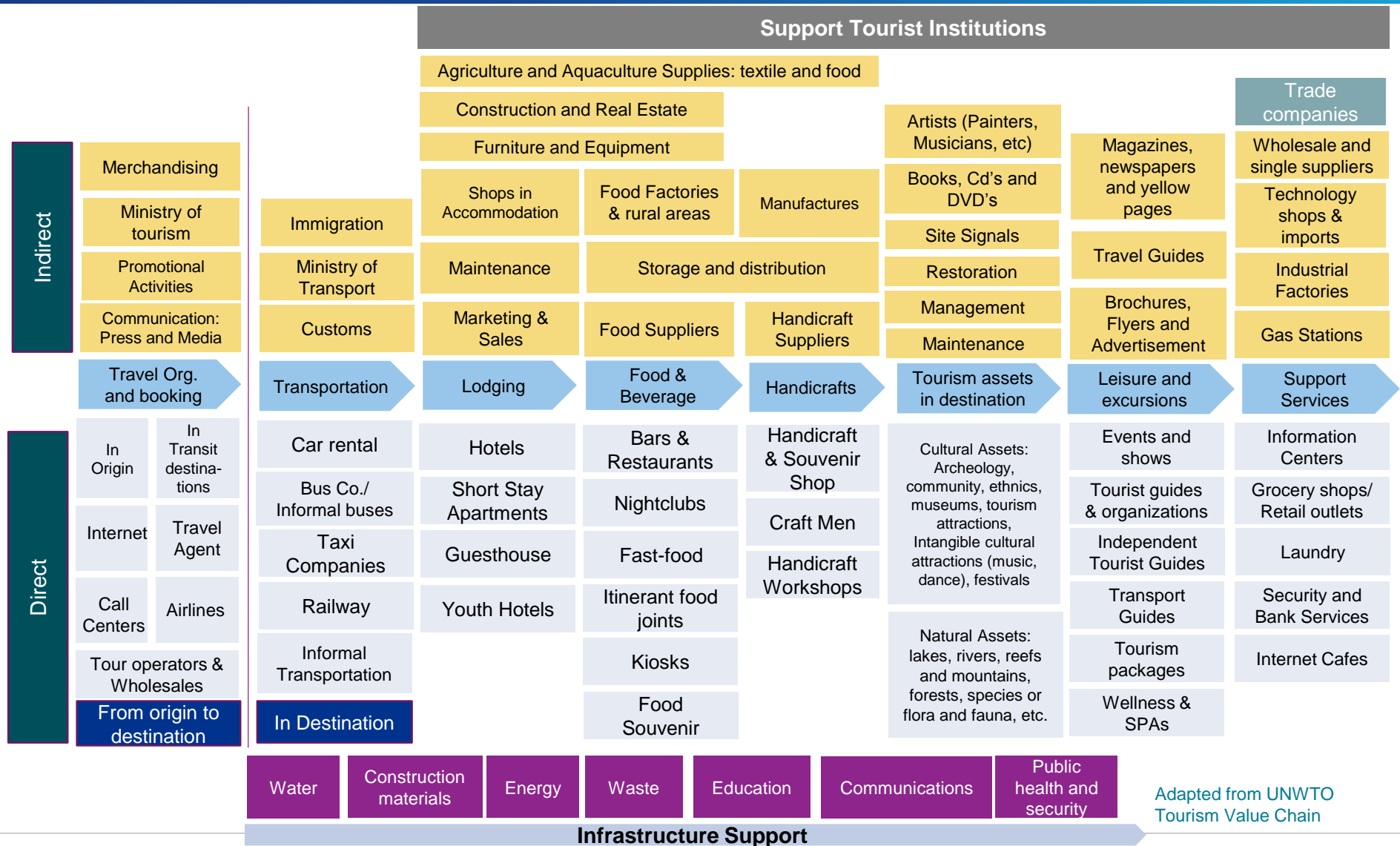
# Tourism Value Chain Analysis

- UNWTO Tourism value chain
- Tourist accommodation
- Events infrastructure
- Travel organization and bookings
- Food and beverage
- Support Infrastructure
- Health infrastructure
- Transport and Connectivity
- Marketing and Promotions



# Tourism value chain analysis

## Snapshot of tourism value chain



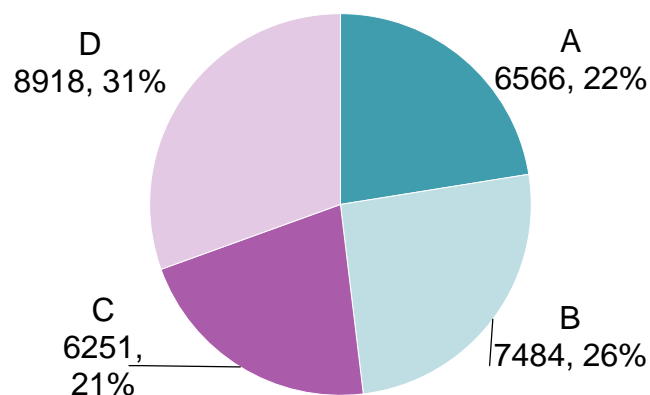
Adapted from UNWTO  
Tourism Value Chain



# Tourism Value Chain Analysis

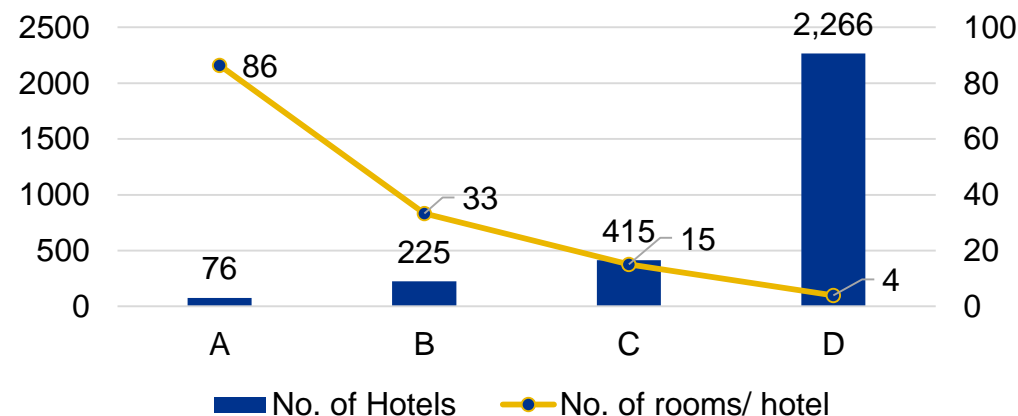
## Accommodation infrastructure Availability

Percentage split of rooms across hotel categories in 2014



Total no. of rooms : 29,219

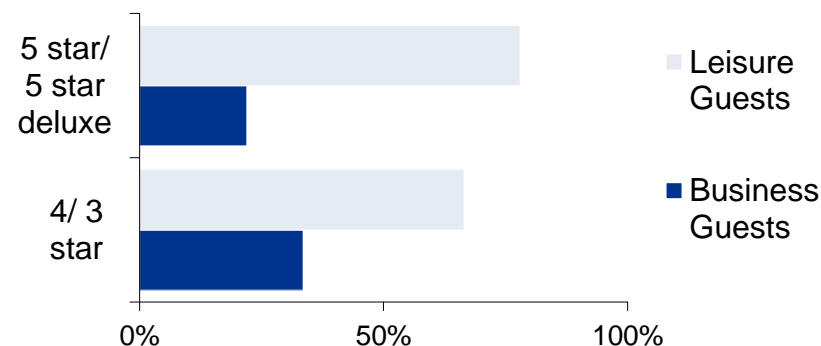
Distribution of A,B,C and D category hotels and Rooms per Hotel



Distribution of Star Category Hotels

| Category      | No. of Hotels | No. of Rooms |
|---------------|---------------|--------------|
| 5 star deluxe | 14            | 2,398        |
| 5 star        | 9             | 843          |
| 4 star        | 3             | 434          |
| 3 star        | 14            | 922          |
| 2 star        | 1             | 10           |
| 1 star        | -             | -            |
| Total         | 41            | 4,607        |

Distribution of guests in 3 star+ hotels

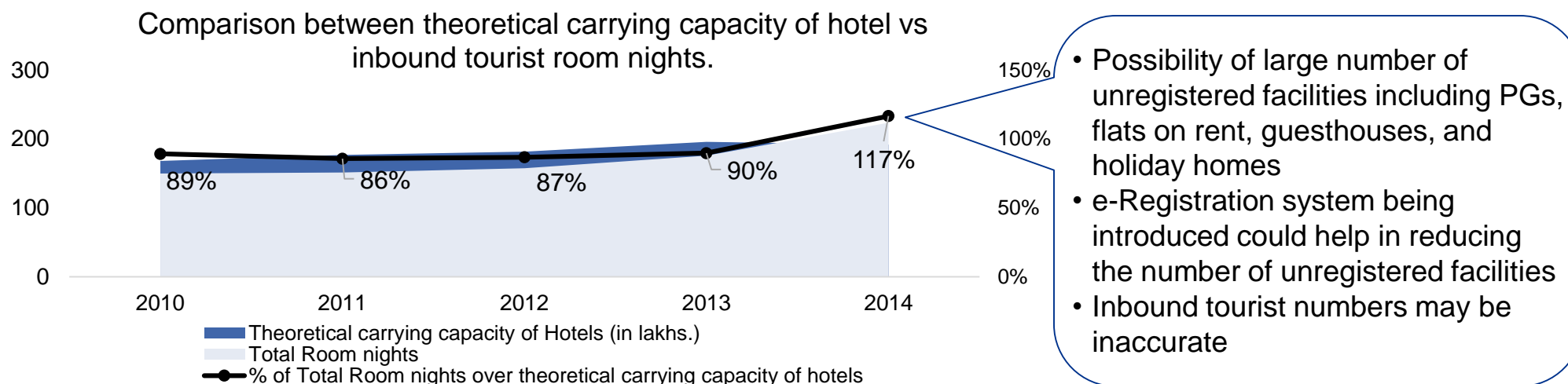
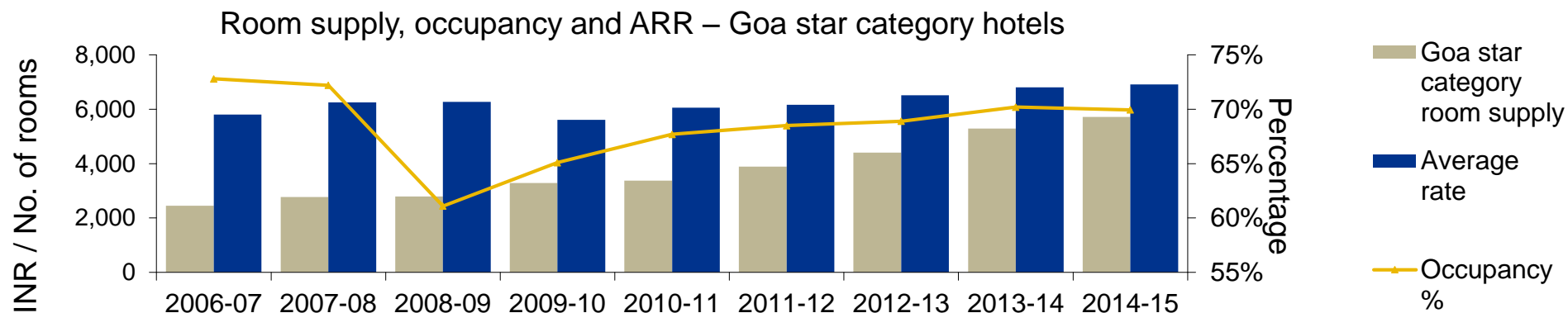


# Tourism Value Chain Analysis

## Accommodation infrastructure capacity analysis

### Key industry insights

- Increased occupancy despite the increase in room supply over the years
- Minimal increase in average room rates(ARR) over the 2012-15 period



# Tourism Value Chain Analysis

Events Infrastructure - Meetings, Incentives, Conventions/Conferences and Exhibitions/Expositions (MICE)

Goa with a multitude of leisure and excursion options is becoming a hub for MICE.

## Key industry insights

- Majority of the events across the state 400-500 pax while a few exceed 1,000 pax
- Conventions comprise 50-60% of the MICE market, while incentives stand at 20-30%

## Challenges faced by the MICE sector

- Limited transport and connectivity, especially road infrastructure
- Unconducive flight timings from most locations leading to higher cost
- High attrition in skilled manpower

## Opportunities/ Competition in this market

- Goa can attract international and domestic MICE clientele through development of world class infrastructure - convention centers and expo halls
- Hyderabad, Delhi, Mumbai, Kerala and Karnataka are key competitors vying for a share of the MICE pie

## List of key event hotels and details of their MICE facilities

| Hotel                                      | Category      | Facilities   | Capacity                     |
|--|---------------|--|------------------------------|
| Vivanta, Aguada                            | 5 star deluxe | 5 banquet halls, 1 hall 2 lawns                      | 1,200 pax, 180 pax 600 pax   |
| Grand Hyatt                                | 5 star Deluxe | ballroom, 5 meeting rooms, 2 boardrooms              | 1,200 pax, 700 pax, 14 pax   |
| Royal Orchid Beach Resort & Spa            | 5 star        | 3 halls , 2 banquet hall lawns                       | 310 pax, 1,350 pax           |
| Holiday Inn Resort                         | 5 star        | 1 hall and 2 lawns                                   | 1600 pax                     |
| Cidade de Goa                              | 5 star deluxe | 2 banquet halls, 5 lawns                             | 675 pax, 905 pax             |
| Resort Rio                                 | 5 star deluxe | 3 conference halls                                   | 1,350 pax                    |
| Taj Exotica                                | 5 star Deluxe | 5 auditoriums  | 800 - 1200 pax               |
| Kenilworth Beach Resort                    | 5 star        | 2 halls , 1 lawn                                     | 1,055 pax                    |
| The Lalit Goa Resort                       | 5 star deluxe | 1 ballroom, 2 meeting rooms, 4 smaller meeting rooms | 600 pax, 280 pax, 10- 20 pax |
| The Zuri White Sands, Goa Resorts & Casino | 5 star deluxe | 1 hall, 1 meeting room                               | 360 pax, 180 pax             |
| Goa Marriott Resort & Spa                  | 5 star deluxe | ballroom, 6 meeting rooms, 3 breakout meeting rooms  | 450 pax                      |
| Fortune Select Regina                      | 5 star        | 3 conference rooms                                   | 0                            |
| Vivanta by Taj Panaji                      | 5 star deluxe | 2 banquet halls, 2 meeting rooms                     | 150 pax, 42 pax              |
| La Calypso Getaways                        | 5 star        | conference hall                                      | 100 pax                      |
| The Crown                                  | 5 star        | 1 meeting room                                       | 50 pax                       |
| Ramada Caravela Beach Resort               | 5 star Deluxe | 3 meeting rooms                                      |                              |

# Tourism Value Chain Analysis

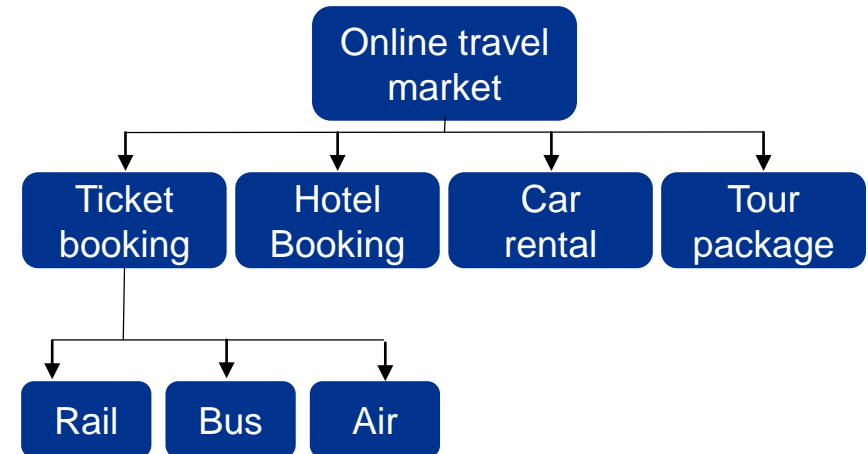
## Travel organization and booking infrastructure

- Online travel is a **USD 4 bn** industry and comprises **71%** of the Indian e-commerce market
- The **online travel business** is expected to grow at **28% to USD 7 bn in 2015** spurred by rising train fares, airline fleet expansion, increased accommodation facilities, and accessibility to internet and smartphones
- The **\$0.8 billion online hotel booking** industry is set to become a **\$1.8 billion industry in 2016<sup>1</sup>**

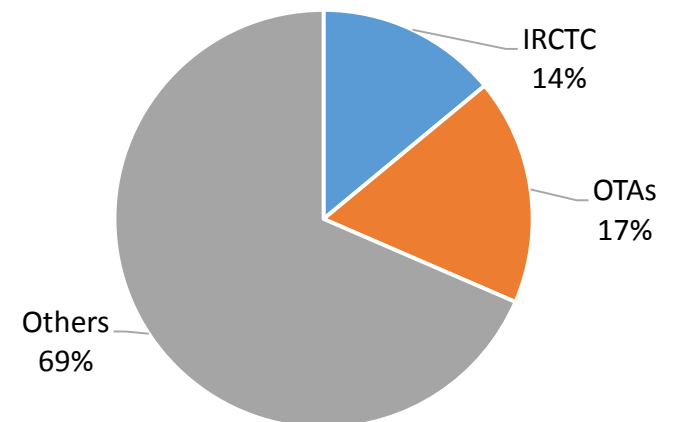
- MakeMyTrip, Cleartrip and Yatra account for 90% of the Indian gross online travel booking market
- This highly competitive market is shifting towards non air travel segments like hotels and package tours due to higher margins<sup>1</sup>

### Online travel industry features

- Low internet penetration in Tier I and Tier II towns, set to increase with penetration of high speed internet connectivity/network along with high speed devices
- Low operating margins necessitating dependence on high volumes
- Service levels are being affected due to mismatch between expected and actual service quality from offline partners.



Break up of gross online travel bookings<sup>2</sup>

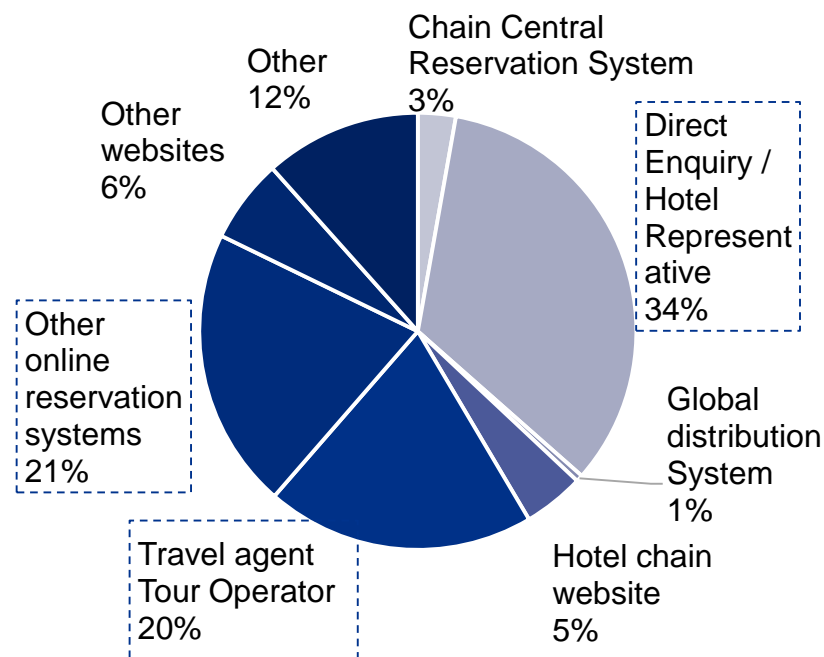




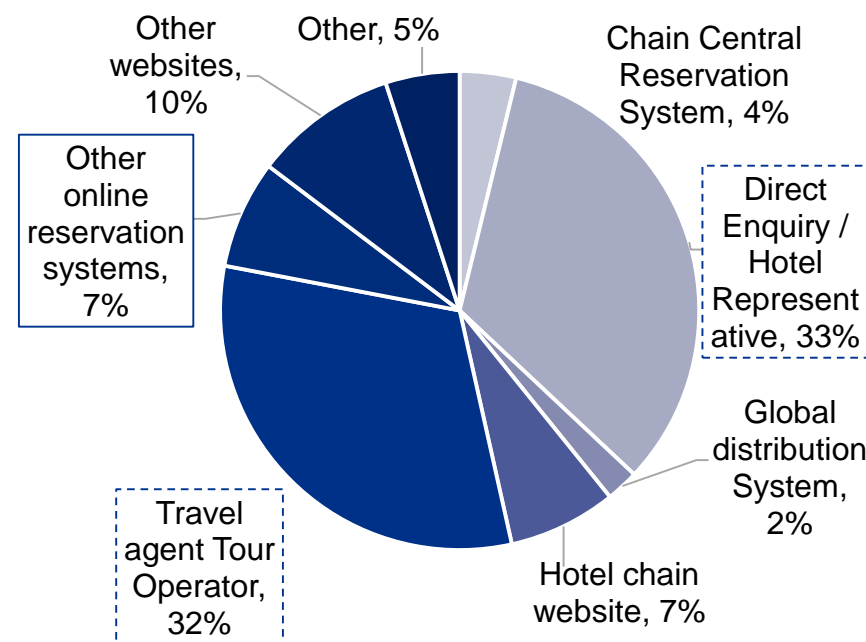
# Tourism Value Chain Analysis

Travel Bookings, travel agencies and tour guides

Modes of reservation for 5 star/ 5 star deluxe hotels in Goa<sup>1</sup>



Modes of reservation for 3 and 4 star hotels in Goa<sup>1</sup>



## Tour/ Travel agents registered in Goa

400 travel agencies and 104 tourist guides registered with DoT in 2013-14<sup>2</sup>

### Industry scenario in accessing online travel booking

- Most starred category hotels across the state have proprietary or white label online interface systems in place
- Some Goan small and medium hotels face constraints while investing in network infrastructure or subscribing to travel portals
- Online travel firms such as Yatra, Cleartrip and Ixigo are venturing into the unbranded budget hotels, which could lead to an increase in supply of budget accommodation

# Tourism Value Chain Analysis

## Food & Beverage facilities

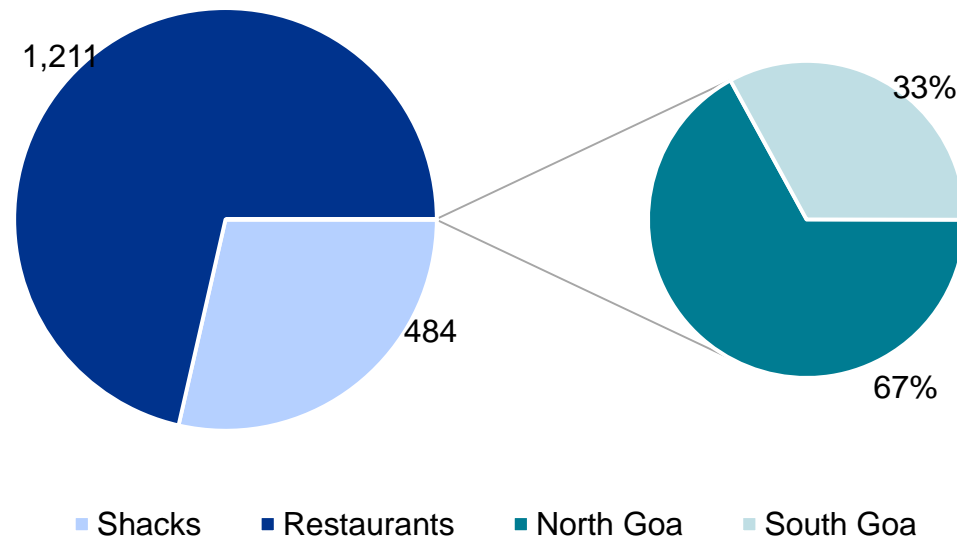
### Key Findings:

- Majority of the restaurants are concentrated in few cities owing to high tourist footfalls
- The demand needed to support quality restaurants is low in other potential tourist places in Goa

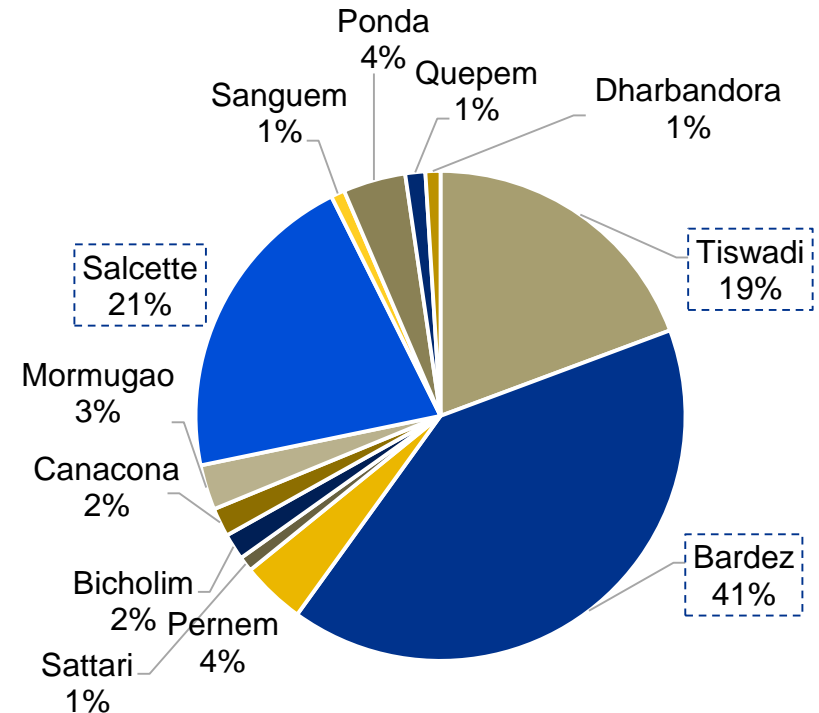
### Key initiatives needed in the industry

- Ramping up hinterland infrastructure and introduction of tourism products subject to feasibility. This would then be supported by F&B facilities

F&B Facilities



Taluka wise distribution of restaurants in Goa



# Tourism Value Chain Analysis

## Support Infrastructure - Water supply & Solid waste management

### Water supply scenario in Goa

- Total water supply - 344 billion liters in 2013-14
- 92% water demand fulfilled by 7 regional water supply schemes
- 100% state coverage in drinking water
- Tourism generates approx. 2.3% water demand

| Name of the Scheme        | Quantity (million litres /day) | Talukas Covered                    |
|---------------------------|--------------------------------|------------------------------------|
| Opa W.S.S.                | 140                            | Ponda, Tiswadi                     |
| Salaulim W.S.S.           | 180                            | Sanguem, Quepem, Salcete, Mormugao |
| Assonora W.S.S.           | 115                            | Bardez                             |
| Podocem/ Sanquelim W.S.S. | 52                             | Bicholim                           |
| Dabose W.S.S.             | 15                             | Sattari                            |
| Chandel W.S.S.            | 15                             | Pernem                             |
| Canacona W.S.S.           | 15                             | Canacona                           |
| <b>Total</b>              | <b>532</b>                     |                                    |

### Solid Waste Management Scenario

- Municipal bodies and local bodies are responsible for collection, transportation and disposal of solid waste
- 191 tons of solid waste is collected from 14 municipalities everyday
- Per capita waste generation rate in the municipal councils is approx. 0.45 kg/day
- Approx. 400 tons solid waste is generated daily in the 189 village panchayats
- Tourism contributes to 8.4% of the total solid waste produced in the state

### Government Initiatives

- Door to door collection service started in major towns like Panaji and Margao
- Works initiation of 100-tons per day ultra-modern municipal solid waste management facility at Saligao
- Plans to have a similar plant in South Goa and Central Goa for garbage management in the state by 2017

### Supply and Demand Scenario

- **Power requirement:** 530 MW during peak hours and 490MW otherwise. The power demand has been increasing by 5%-10% annually with average shortfall of around 100 MW during peak hours.
- **Supply:** National Thermal Power Corporation and Nuclear Power Corporation provide around 450 MW of power to Goa and 35-38 MW of power is produced by co-generators such as Sesa Goa
- 20% of power is lost due to commercial, transmission, technical and distribution losses

### Government initiatives towards reducing power loss to 9%

- Underground cabling of the power lines
- Rs 1,200 crore has been sanctioned from the Union Power Ministry for two schemes - Integrated Power Development Scheme for urban areas and Deen Dayal Upadhyaya Gram Jyoti Yojna for rural area power needs

### Distribution of electrical power supplied in 2014-15

| Sector                                  | Energy consumed (mn kWh) |
|---|--------------------------|
| Energy consumed for domestic purposes   | 737                      |
| Energy consumed for commercial purposes | 268                      |
| Energy consumed for industrial purposes | 1,699                    |
| Energy consumed for irrigation purposes | 31                       |
| Energy consumed for other purposes      | 342                      |
| Total energy consumed                   | 3,114                    |

### Goa Tourism Impact

- The energy requirement of the tourism establishments is around **210 mn kWh** annually which is 7% of the total energy consumed in the state
- The shortfall of 100MW during peak hours adversely affects the tourism industry through frequent power cuts

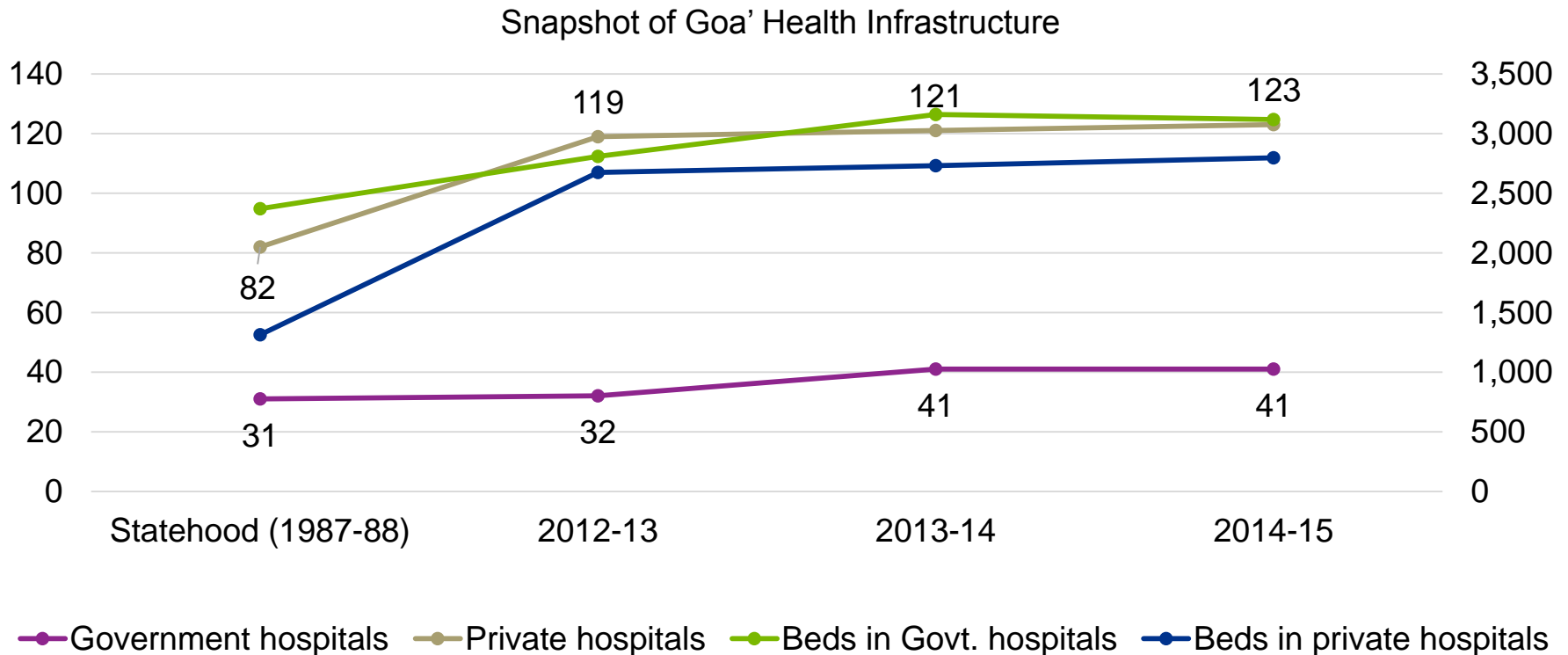


# Tourism Value Chain Analysis

## Support Infrastructure - Health Infrastructure

Goa has a sound health infrastructure in place to cater to the health needs of locals and tourists alike:

- Doctor population ratio - 1:795
- Bed population ratio - 1:273



# Tourism Value Chain Analysis

## Connectivity - International and Domestic Air Connectivity

### Direct flight connectivity to international source markets

29 non stop flights ply weekly to and from Goa to key international destinations.\*

| Weekly direct flights (International) to and from Goa |          |               |                               |
|---|----------|---------------|-------------------------------|
| Airport   | Country  | Airline       | No. of inbound/outbound trips |
| Doha  | Qatar    | Qatar Airways | 7 / 7                         |
| Dubai   | UAE      | Air India     | 8 / 8                         |
| Kuwait City   | Kuwait   | Air India     | 3 / 3                         |
| Muscat  | Oman     | Oman Air      | 4 / 4                         |
| Sharjah   | UAE      | Air Arabia    | 5 / 5                         |
| Kuala Lumpur  | Malaysia | Air Asia      | 2 / 2                         |

- The proposed airport at Mopa is expected to be capable of handling B777 and A380R aircraft types.
- This makes the state accessible practically from a significant number of international tourist markets via direct flight connections.

### Weekly direct flight connectivity to domestic source markets



# Tourism Value Chain Analysis

## Connectivity - Rail and Road Connectivity

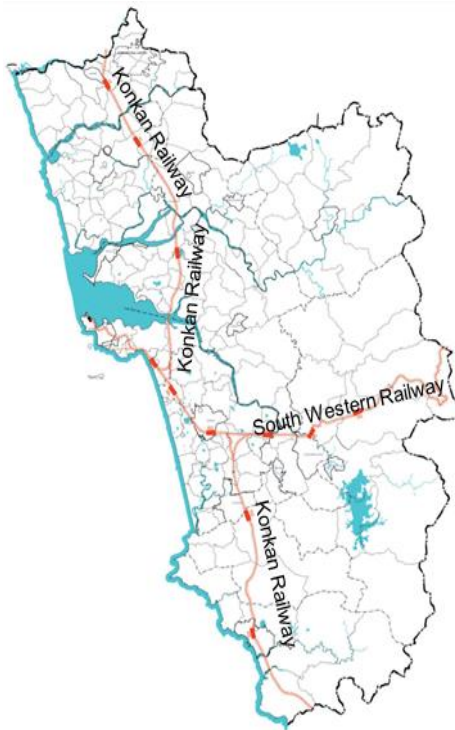
### Rail Connectivity

The Konkan railway line connects Goa to the Konkan and Malabar Coast

South Western Railway connects to Eastern India

Konkan Railways currently has a Single Track Broad Gauge railway line with:

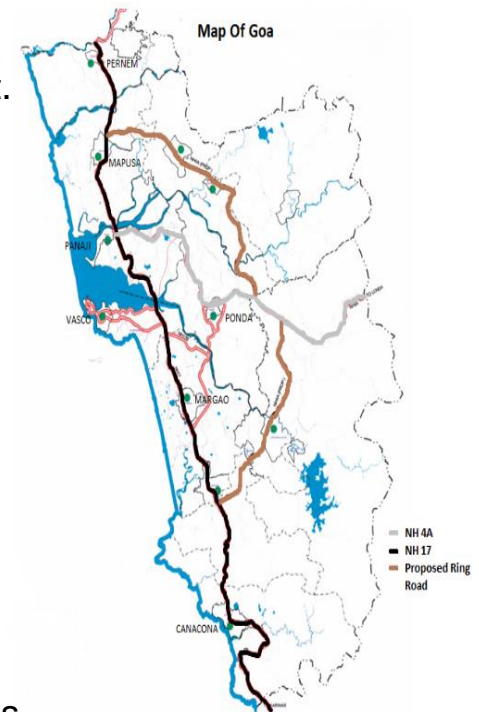
- Design speed of 160 km, with trains running at upto 120 km/hr
- About 36 passenger trains running on this track per day passing through Goa.
- Connections to the south western railway line at Majorda and Margao



### Road Connectivity

Goa is connected to the rest of India through two major highways – NH17 and NH4A

- NH4A starts from Belgaum in Karnataka and ends at Panaji in North Goa district.
- NH17 runs roughly north–south along the western coast of India, parallel to Western Ghats connecting Panvel (South of Mumbai city) to Kochi in Kerala, passing through Maharashtra, Goa, Karnataka, and Kerala.
- Phased augmentation through four and six laning of certain highway stretches



# Tourism Value Chain Analysis

## Connectivity - Cruise and Charter Travel

### Cruise Travel

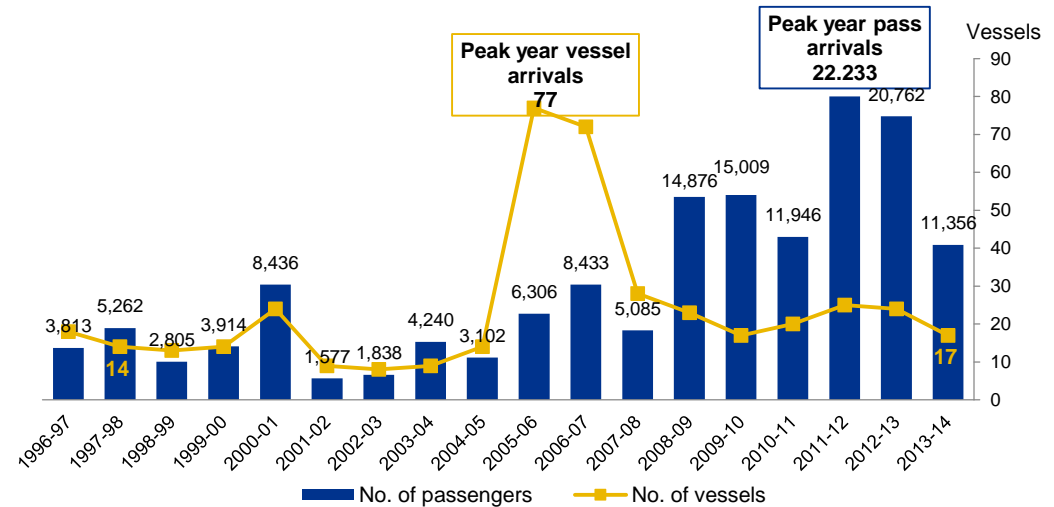
Cruises arrive at Goa at the Mormugao Port Trust berth number 9 or the Captain of Ports jetty at Panaji.

#### Key Statistics

- Avg. no. of vessels per year - 40
- Avg. no. of passengers per year - 12,000

#### Trends

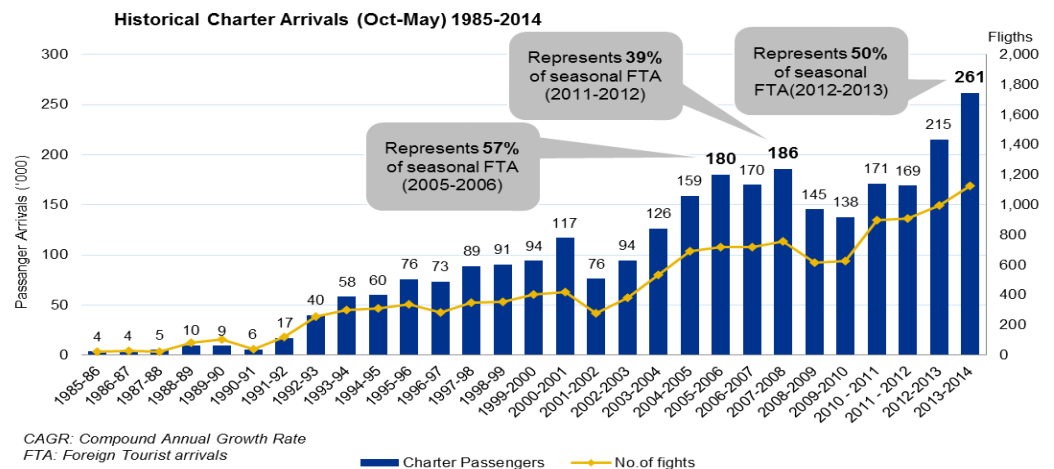
- There is an increase in arrival in the months of Mar-Apr-May
- Vehicle sizes have been increasing from 2007-08



### Charter Travel

An important mode of transport preferred by international travelers

- Increasing trend of travelers preferring charter flight till FY 2014. (CAGR growth of more than 25%)
- There is a decrease in number of chartered flights in FY 2015 primarily due to<sup>1</sup>
  - Limited overnight parking facilities at Dabolim airport
  - Fluctuation in currency exchange rates of major source markets



# Tourism Value Chain Analysis

## Connectivity - Travelling in Goa

### Bus



- Kadamba Transport Corporation operates 15 bus stands and 4 depots
- With a fleet of 415 busses (2012) it operates 87.7k km per day

### Motorcycle pilots



- Cater to 60 - 70% locals and 30 - 40% tourists (mostly domestic)
- Average daily earnings are Rs. 200 – 300 in off season and up to Rs 600 during peak season

### Taxis



- Cater to 60 - 70% of locals, 25% domestic and 5 - 10 % foreign tourists
- Avg 3 trips/ day in season and 1 – 2 trips in off season

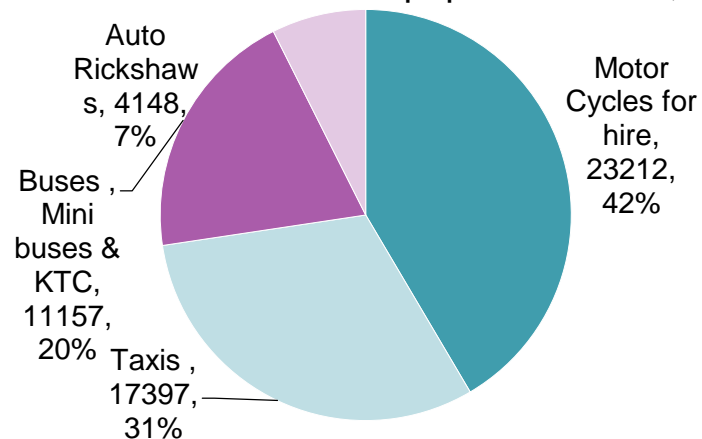
### Rental cars/ bikes



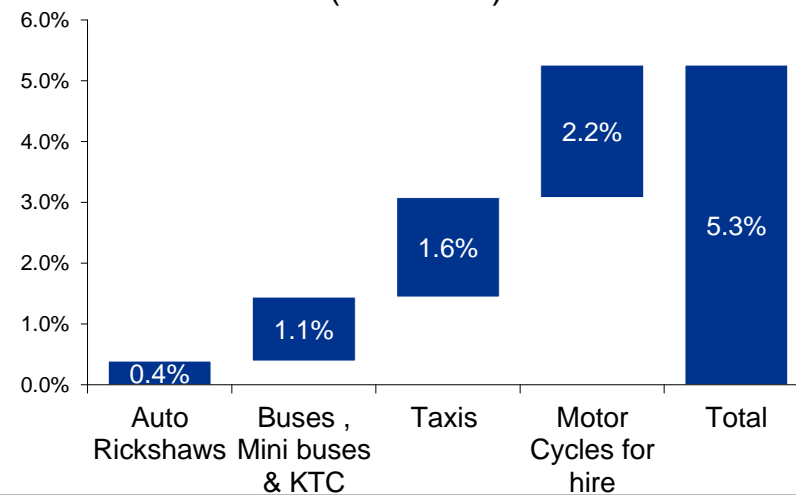
- Cater to 80-90% domestic tourists and 10-20% foreign tourists
- Around 1,000 “Rent a car” vehicles are present in North Goa

Source: Based on interaction with tourist vehicle owners

## Tourist commercial vehicular population of 55,914



## Tourist Vehicles to total number of registered vehicles (10.6 lakh) in Goa





# Tourism Value Chain Analysis

## Connectivity - SWOT

### Strengths

Well connected to the Middle East through **direct air connections**

**Charter** flights deliver quick results in growth of tourism arrivals

**Cruise** :State of the art cruise terminal proposed at MPT

**Rail**: Well connected to India through Konkan and South Western railway lines

**Road**: NH17 and NH4A passing through the state, along with the proposed expansion plans

### Weakness

**Load on travel facilities** during the peak season leading to **extreme pricing** of travel options

**Limitations** on Dabolim airport timings

**Dependence** on charter flights for international tourists

Increased **accidents** and increased travel times during the **monsoons**

Extremely **narrow roads** in stretches leading to traffic bottlenecks and traffic incidents

### Threats

Development of **airports in nearby states** having similar tourism offerings

Movement of charter flights to other tourism destinations offering a 'better deal'

Cruise: Better cruise terminal facilities **at nearby tourist destinations**- national and international

### Opportunities

Significantly enhanced connectivity due to the upcoming Mopa airport

Conversion of charter flights to **regularly schedule** flights from existing and new markets

Introduction of **luxury trains and circuits** combined with other states

Attracting **larger vessels** and **increase of halt duration** with development of strong cruise circuits

Highway and rail network expansion

# Tourism Value Chain Analysis

## Marketing Activities

**Brand Development:** In 2013-14, DoT developed a new brand identity for Goa. The key feature of the refreshed positioning and branding was on emphasizing the 'contrasts' in Goa

### Organization

- The State Level Marketing and Promotion Committee ("SLMPC"), chaired by the Tourism Minister performs the key role of shaping marketing strategies and branding plans for DoT
- DoT allocates marketing budgets to GTDC for marketing and promotional activities based on SLMPC recommendations

### Marketing activities

#### Direct Marketing

- Domestic & International Road Show Calendar
- Strategic Tie ups with Hotels e.g Old Byke Anchor hotel for attractive packages and Online forums e.g Burrp for driving Goa' visibility

#### Marketing communications across various media

- Development of Campaign Calendar
- Media Coverage across Print, Electronic and Television

**Social Media Presence:** Goa Tourism maintains an active social media presence. Mentions of Goa on social media are also tracked.



#### Role of SLMPC

|                      |                             |
|----------------------|-----------------------------|
| Branding Plans       | Marketing Communications    |
| Marketing Strategies | Event calendar finalization |

| FAM Tours by DoT | Domestic | International<br>(Europe & Asia) |
|------------------|----------|----------------------------------|
| 2012             | 7        | 8                                |
| 2013             | 27       | 18                               |
| 2014             | 14       | 5                                |

#### Media & Events Coverage

|                                |     |
|--------------------------------|-----|
| Number of Magazines            | 18  |
| Number of Advertising Agencies | 2   |
| Number of Events Covered       | 22+ |

#### Social Media Presence

|           |         |
|-----------|---------|
| Linkedin  | Youtube |
| Facebook  | Google+ |
| Instagram | Twitter |

Source: GTDC, Goa Tourism Annual Review FY13-14

# Tourism Value Chain Analysis

## Tourism marketing SWOT

### Strengths

Wide range of tourism offerings

Facilities like e-visa, direct connectivity, single window system for travel operators and beach safety systems are in place.



### Weakness

Lack of unified marketing communication leading to unclear tourism promotions

Some of the brand attributes are not conducive to attractive high end tourists



### Opportunities

Promotion of large events, new products and geographies and tourism circuits

Usage of technology like GPS, mobile apps to service increased demand



### Threats

Wide international news coverage of violence against women in India

Aggressive marketing competition from neighboring states like Karnataka and Kerala

Increasing visibility of other states in trade shows





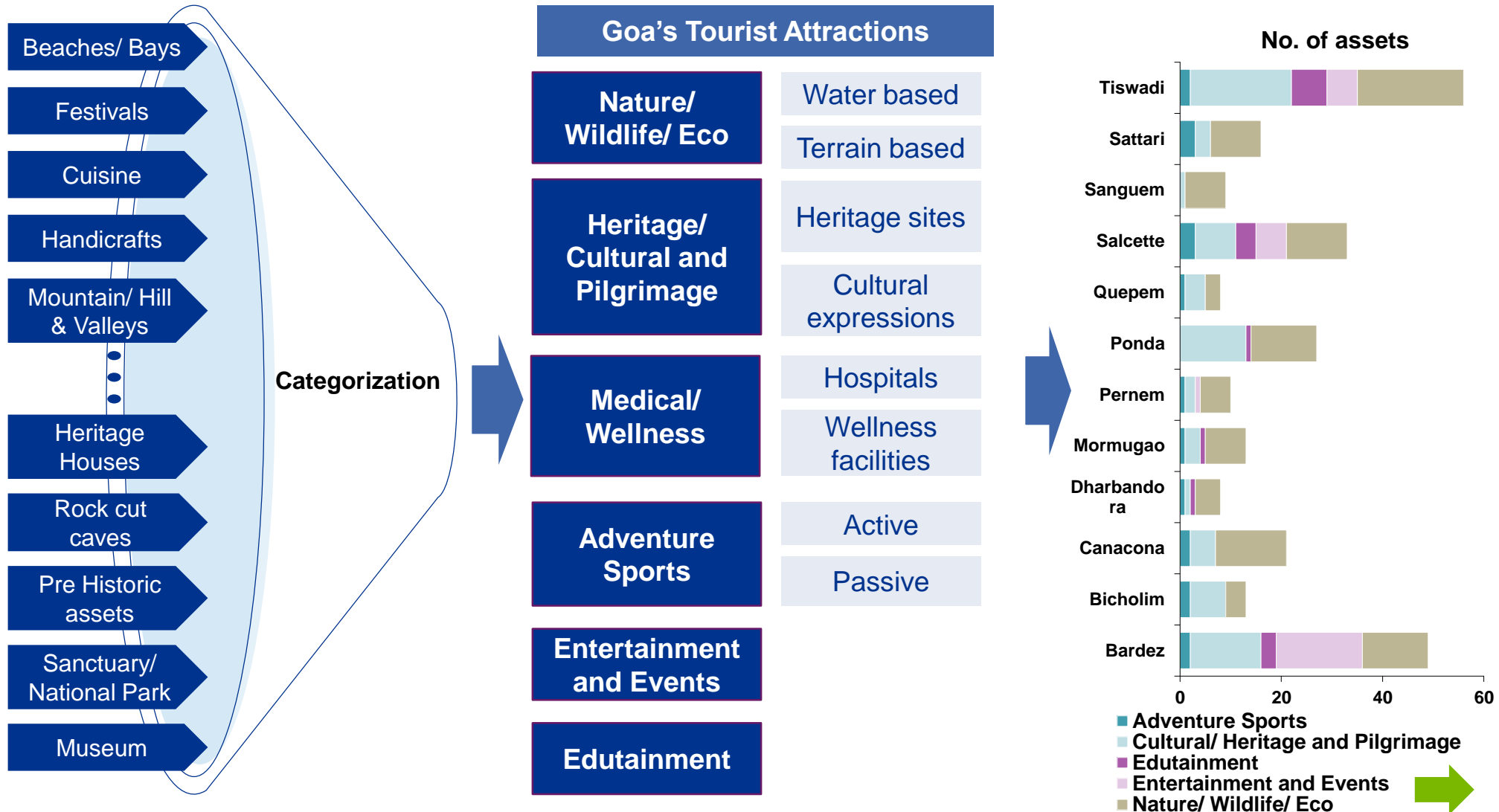
# Asset Analysis: Goa Tourism

- Asset category identification, categorization and location
- Asset evaluation
- SWOT Analysis



# Supply Analysis : Goa Tourism Assets

Asset Category Identification, Categorisation and Spread across the state





# Supply Analysis : Goa Tourism Assets

## Asset Evaluation



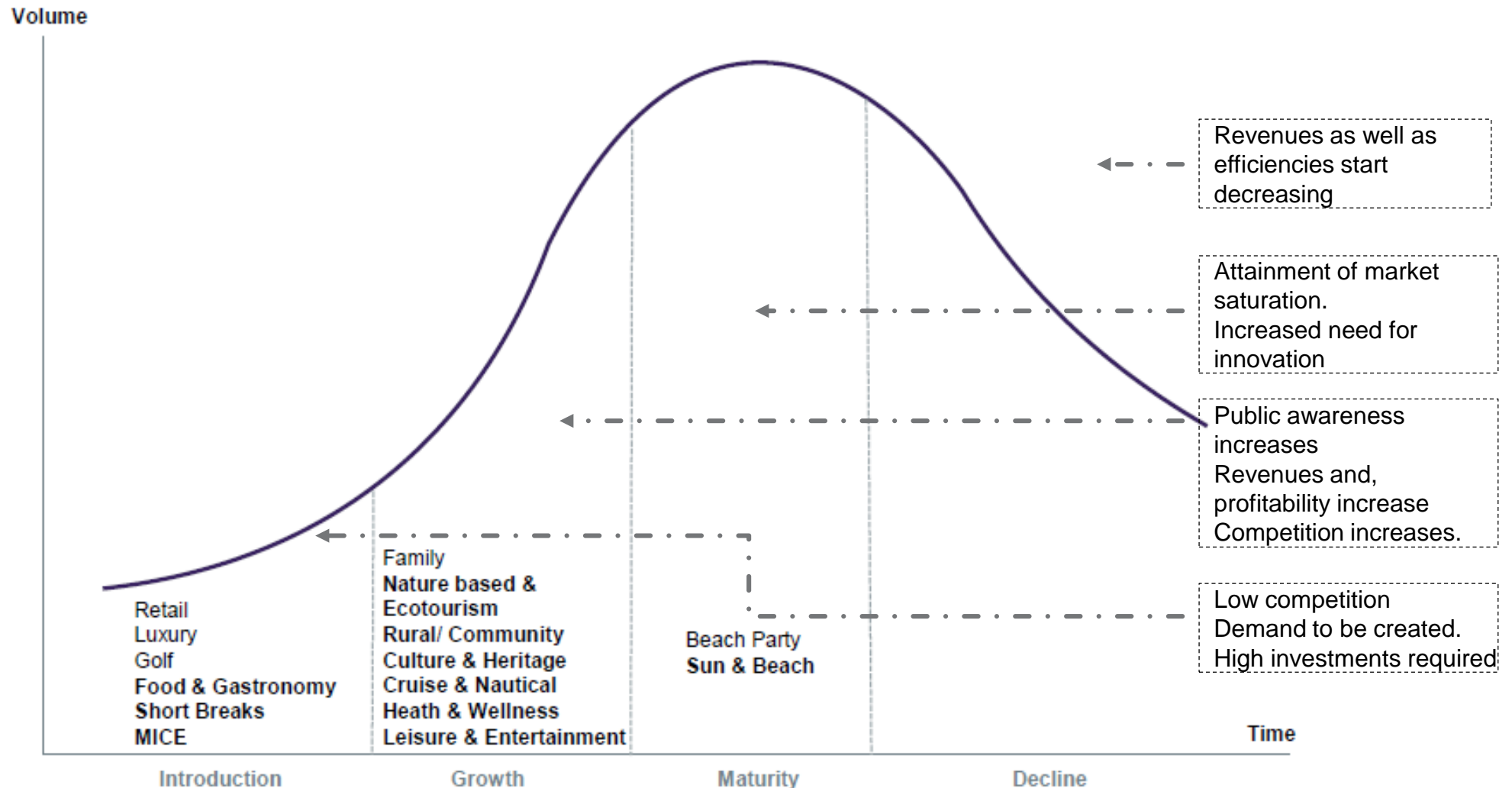
| Reduced                             | Medium                    | Superior                              | International             | Unique                    |
|-------------------------------------|---------------------------|---------------------------------------|---------------------------|---------------------------|
| Local and domestic tourist interest | Domestic tourism interest | Dom – High; Int - Proximity dependent | International recognition | Unique asset in the world |
| General condition                   | Accessibility             | Current use                           | Interpretation            | Value                     |



**Asset Evaluation Matrix**

# Supply Analysis : Goa Tourism Assets

## Product Life Cycle Analysis



# Supply Analysis : Goa Tourism Assets

## SWOT Analysis

### Strengths

- Culture and history spanning centuries from 1,000 BC
- Varied cultural festivals and events over the year.
- Diversity and contrast of Goa' tourism portfolio.
- A long coastline providing ample beaches and cliffs along the state
- Unique natural assets like fresh water crocodiles, bio luminescence in the Western Ghats and myristica swamps
- Portuguese heritage

### Weaknesses

- Unfocussed heritage conservation efforts
- Limited road infrastructure to some tourism assets
- Historical promotion of “sun, beach and sand” alone has led to non-discovery of other tourism assets
- Over utilization of resources like beaches
- Non standardization and promotion of locally made handicrafts
- Concentration of tourists currently in the beach belt leading to a strain and deterioration of assets

### Opportunities

- Rise in travel for medical and wellness tourism
- Promotion of cruise tourism supported by the proposed cruise terminal at MPT.
- Eco-conscious travel is gaining popularity
- Promotion of adventure/ sports tourism
- Connectivity with the Middle East
- Community based tourism
- Short breaks
- Increased MICE tourism in lean season

### Threats

- Presence of multiple handicraft emporiums offering non Goan products
- Overcharging of consumers
- Ease of access and affordability of overseas destinations in S. Asia
- Possibility of natural calamities
- Risk of deterioration and loss of cultural and heritage assets in the absence of tourism promotion
- Increasing MICE and corporate outbound travel options from international destinations



# Tourism' contribution to Goa

- Contribution to economy and employment
- Social impact of tourism
- Environmental and governmental regulations

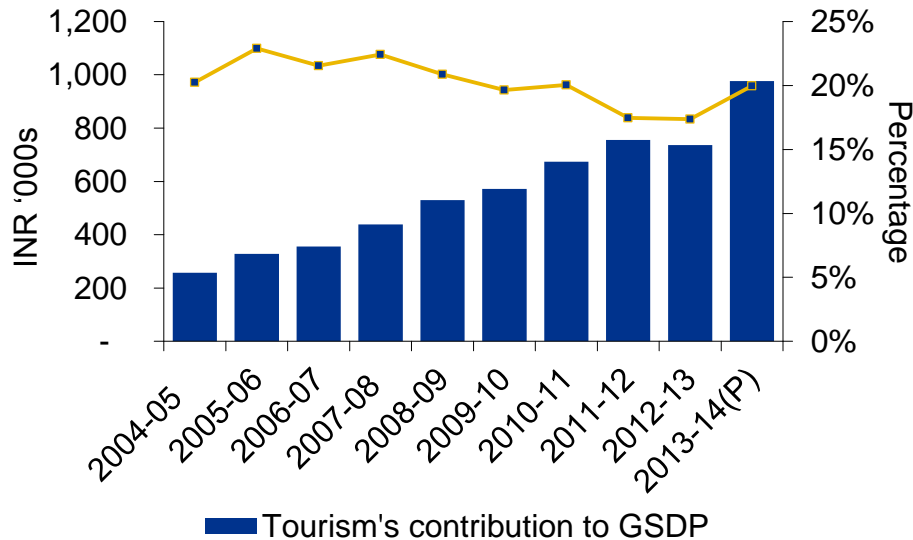


# Tourism' contribution to Goa

## Contribution to Economy and Employment

### Contribution of Tourism to Goa' GSDP

- Tourism contributed INR 9,726 crore in FY 2014 to the state GSDP (direct, indirect and induced)
- Direct contribution to GSDP is through the trade hotel & restaurant industry and certain components of the transport & communication industry
- The worldwide average tourism multiplier is estimated at 1.6



### Contribution of tourism to employment

- Tourism is a key contributor to the Goan job market where people are mainly employed in hotels, restaurants and tourist transport sectors.
- In 2013, tourism is estimated to have generated between 95,000-100,000 jobs in Goa (16 – 17% of total workforce of approx. 5.58 lakhs)

#### Challenge ahead

- Lack of suitably skilled resources and mismatch between employer and employee remuneration expectations could prove to be bottlenecks in the industry's growth.

#### Skill development initiatives towards enhancing the tourism jobs eco system is needed in:

- Hospitality
- Tourist guides
- Tourist taxi drivers
- Sub-sections where development is at a nascent stage – Eco-tourism and Medical-tourism



# Tourism' contribution to Goa

## Social impact of tourism

- Tourism contributes a significant chunk to the GSDP, this benefits the states socio-economic objectives through increased direct and indirect jobs and economic growth
- Tourist interest in ethnicity and authenticity encourages people to preserve their culture and heritage. However, care needs to be taken to maintain the ethnicity and authenticity and prevent against commoditization
- Tourism is partly responsible for some activities which could have a negative social impact such as alcoholism, gambling addictions and substance abuse

# Tourism' contribution to Goa

## Substance abuse and Governmental initiatives

### Substance abuse statistics - Goa

53, 55 and 50 cases were registered in 2011, 2012 and 2013 respectively under the Narcotics Drugs and Psychotropic Substances Act

Over 119 Indian nationals were arrested for the illegal possession or distribution of Narcotic substances in the period from 2011- 2013

50 – 60 % of the drugs seized in Goa<sup>1</sup> are synthetic party drugs

### Preventive measures

#### Improved police infrastructure

Enhancement of capabilities by modernization of Police infrastructure.

10 tourist wardens deployed to keep a vigil on tourism related crimes

#### Anti-narcotic cells

Special anti-narcotic cell squads formed to crack down on rave parties and drug trade

#### Tourist Security Force

Consists of 4 officers from Goa police force and 5 officers, 99 constables from the Indian Reserve Battalion

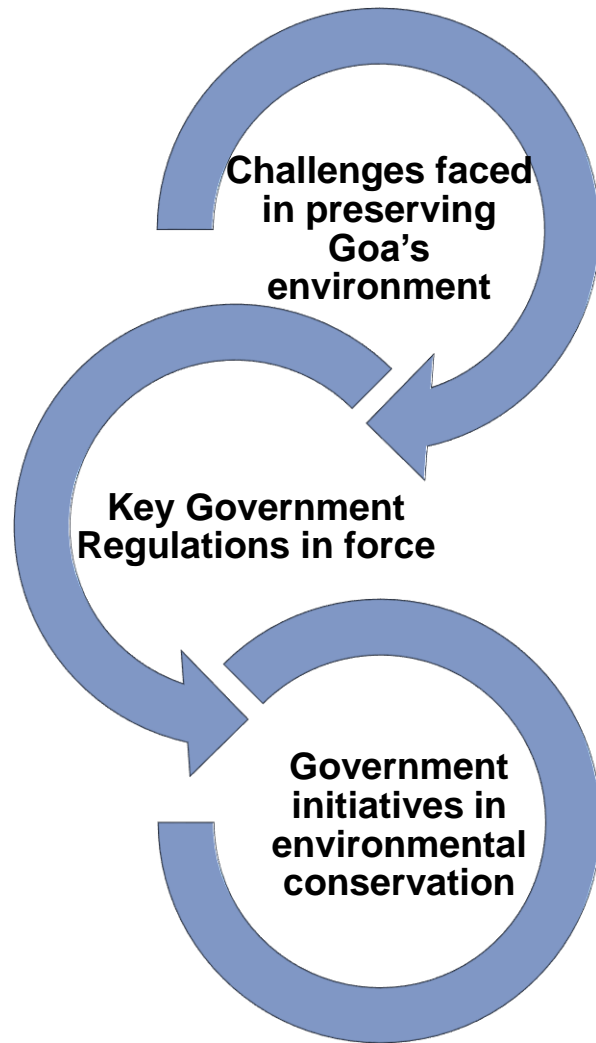
Setting up of beach patrols to clamp down on illegal touts, shack inspection for illegal beds and tables

Dissemination of tourism information and ensuring safety and security to tourists

Source : [http://timesofindia.indiatimes.com/city/goa/Some-tourists-visit-Goa-for-drugs-ANC-SP/articleshow/46534142.cms?](http://timesofindia.indiatimes.com/city/goa/Some-tourists-visit-Goa-for-drugs-ANC-SP/articleshow/46534142.cms?http://www.firstpost.com/india/one-drug-bust-every-week-yet-go-a-claims-theres-drug-mafia-1704609.html)  
<http://www.firstpost.com/india/one-drug-bust-every-week-yet-go-a-claims-theres-drug-mafia-1704609.html>  
The Navhind Times 30 July 2015

# Tourism' contribution to Goa

## Environmental considerations & Governmental initiatives



- Overutilised waste management system
- Lack of educational and awareness initiatives on environment conservation
- Limited enforcement of deterrent measures on persons polluting beaches, water bodies and eco-sensitive areas
- Instances of tourism trade institutions emptying solid and liquid waste on beaches/ into water bodies
- Untreated solid/ liquid waste disposed in eco-sensitive areas
- CRZ violations on beaches
- **Coastal Regulation Zone** :The Goa Coastal Zone Management Authority enforces the coastal zone regulations and initiates action on any violations thereof.
- **Wildlife protection Act** :Regulates tourism activities in eco-sensitive zones and protected areas
- Installation of garbage bins on beaches frequented by tourists
- Banning of glass bottles/ plastic and consumption of alcohol on beaches
- Appointment of private agencies for beach cleaning and garbage management
- Setting up of modern solid waste management facilities



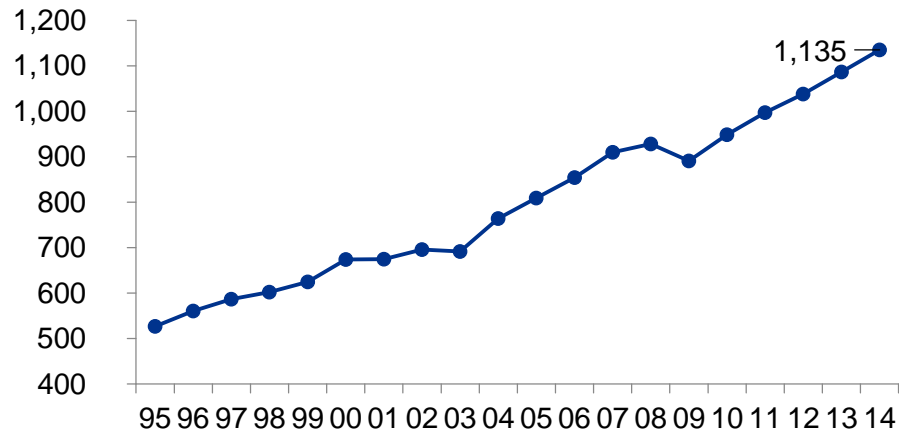
# Tourism Trends

- International trends and emerging country case
- Rising trends in consumer and travel
- Growing avenues in tourism

# Tourism Trends

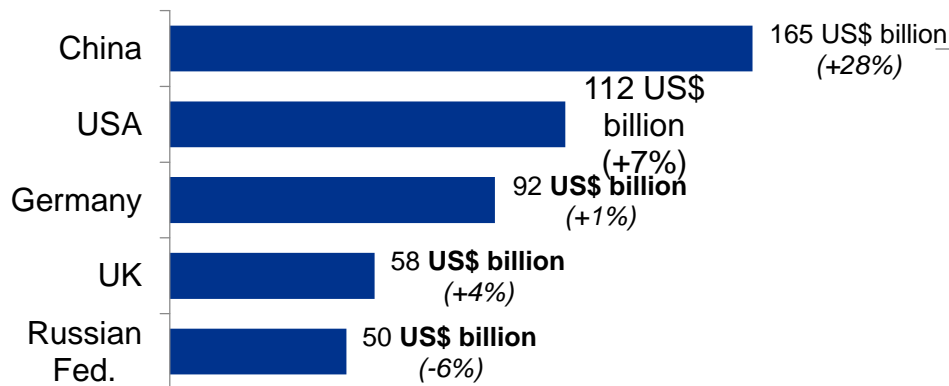
## International Trends & Emerging Country Case

International tourists' arrivals, 2014 (million)



- Asian and Pacific countries welcomed 263 million international tourists, an increase of 5% over 2013.
- The region earned US\$ 377 billion in tourism receipts, up by US\$ 16 billion over 2014 (+4% in real terms).
- Asian and Pacific countries account for 23% of worldwide arrivals and 30% of receipts.

International Tourist expenditure 2014



### Case of an Emerging Economy - China

- China is becoming an increasingly important source market for international tourists due to its rising affluence.
- China has experienced a dramatic growth with 26% rise in outbound trips in 2013 and topped in terms of total tourism spend in 2014.

#### Chinese consumer trends

- **Luxury market** is expanding with a wider group of people with disposable incomes.
- **Passenger growth for LCCs** is predicted to vastly overshadow that of schedule airlines e.g. Air Asia, Scoot and Tiger Airways

Source: World Tourism Organization (UNWTO)

# Tourism Trends

## Rising trends in travel and tourism



### Online Consumer Trends

- Increasing shift towards analytics & technology players
- Rise of Mobile apps as channel for sales and growth.
- Increased demand for on the go booking and social updates.
- Enhancement of experience on online interface



### Expansion of Low Cost Carriers

- Business travelers have become the target of the LCCs
- Introduction of 'affordable luxury' options into LCC's business model.
- Ease in regulations and legislations are opening up new markets such as Russia for Ryanair and Easyjet.



### Sharing Economy

- Peer-to-peer economy. Airbnb, Uber, Lyft, and other such companies are riding the wave of new growth.
- Millennial are fond of the sharing economy model in this technology friendly scenario.



### Rise of Millennial

- Exploration, interaction and experience are the major focus of millennial who are willing to pay more for a greater experience.
- They are technologically savvy and very expressive about their experiences and feedback.



# Tourism Trends

## Global tourism trends

- Luxury travellers prefer authentic and experiential travel especially in the traditional luxury travel markets.
- They search for rest and relaxation flexibility ,safety and spending some quality time with their near ones.

### Luxury travel



- Frontiers between work and leisure are becoming blurry allowing the conversion of business trips into leisure breaks.
- Upward trends in business travel for both domestic and international markets.

### Business leisure and Pure business travel



- In line with increasing health awareness, sports tourism has been constantly growing in the recent years.
- Adventure tourism is opening to public who are looking for experiential travel.

### Sports and adventure tourism



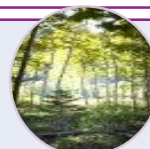
- Wellness-minded consumers integrate healthy habits and activities into their lifestyles and their travel.
- Tourists are looking for a destination that offers programs integrating wellbeing and good food.

### Health & Wellness



- Tourists today are aware about sustainable tourism and are also looking into reconnecting with nature to escape busy and stressful life and environment.

### Eco-conscience



- The development of community tourism and the rise of creative class shows that today travellers want to be part of the local culture during their holidays.

### Living closer to the locals



# Tourism Sustainability

- Sustainability paradigms and leading certifications
- Sustainability benchmarking case studies



# Tourism Sustainability

## Sustainability Paradigm - Various pillars for sustainability and leading certifications

**Sustainable tourism** is defined as tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.



The **Economic Pillar** is defined as the generation of prosperity at different levels of society and addresses the cost effectiveness of all economic activities.



The **Socio – Cultural Pillar** is based on the respect for human rights and equal opportunities for all in society requiring an equitable distribution of benefits



The **Environmental Pillar** refers to the conservation and management of resources, including natural- and cultural resources, bio-diversity and waste management



The **Transversal Pillar** provides support to the Economic, Socio- Cultural and Environmental pillars through governance, infrastructure etc.

Source: UNEP, Making tourism more sustainable. A guide for policy makers. **Various pillars for sustainable development.**

### Snapshot of leading certifications

#### Green Globe



Limitation of energy use and water resources, reduction of operational costs, positive contribution to local communities and their environment

#### Blue Flag



Measurement of water quality, the provision of environmental education and information, environmental management, and environmental safety.

#### Rain Forest Alliance



Conservation of biodiversity and improvement of livelihoods by delivering sustainability auditing, verification, validation, and certification services based on the best global standards

#### GSTC Travel Forever



Promotion of widespread adoption of global sustainable tourism standards to ensure the tourism industry continues to drive conservation and poverty alleviation .

#### ISO 14001



ISO is an organization which develops International Standards, including management system standards such as ISO 9001, ISO 14001 and ISO 31000

#### BREEAM



Best practices in sustainable building design, construction and operation and has become one of the most comprehensive and widely recognized measures of a building's environmental performance

# Tourism Sustainability

## Sustainability Benchmarking Case Studies - Various Institutions and their role in sustainable development

| Costa Rica   |   | New Zealand                               |   |
|--|---|---|---|
| <b>Costa Rica Tourism Institute (ICT)</b>                | Development of tourism, maintaining a balance with the protection of the country's natural resources and biodiversity.  | <b>Ministry for the Environment</b>       | Environment management., New Zealand climate change. Land management and water conservation.  |
| <b>National System of Conservation Areas (SINAC)</b>     | Integrates the competencies related to forestry, wildlife and protected areas .It dictates guidelines, plan and implement processes directed towards the sustainable management of natural resources. | <b>Department of Conservation</b>         | Land, water, plant and animal conservation, heritage protections and managing threats; Land and freshwater ecosystems and marine and coastal environment management; Parks & recreation |
| <b>National Tourism Chamber (CANATUR)</b>                | Integrates the private tourism initiatives, promotes the development of sustainable growth of tourism sector in a proactive and representative manner.  | <b>New Zealand Tourism Board</b>          | (Equivalent to the Ministry of Tourism) Matters related to transportation, accommodation and activities   |
| <b>National Biodiversity Institute (INBio)</b>           | Areas of action spans from inventory, monitoring and conservation . Also works on the communications and education, Biodiversity informatics, Bio-prospecting   | <b>Tourism New Zealand</b>                | In charge of the economy's Tourism website and Marketing Campaign 100% Pure New Zealand   |
| <b>National Commission of Indigenous Affairs (CONAI)</b> | It promotes social, economic and cultural development of indigenous population; promote the knowledge of indigenous issues; ensure respect for the rights of indigenous minorities                    | <b>Tourism Industry Association (TIA)</b> | It represents and offers services that help and promote the future development of the tourism sector on a sustainable basis.  |





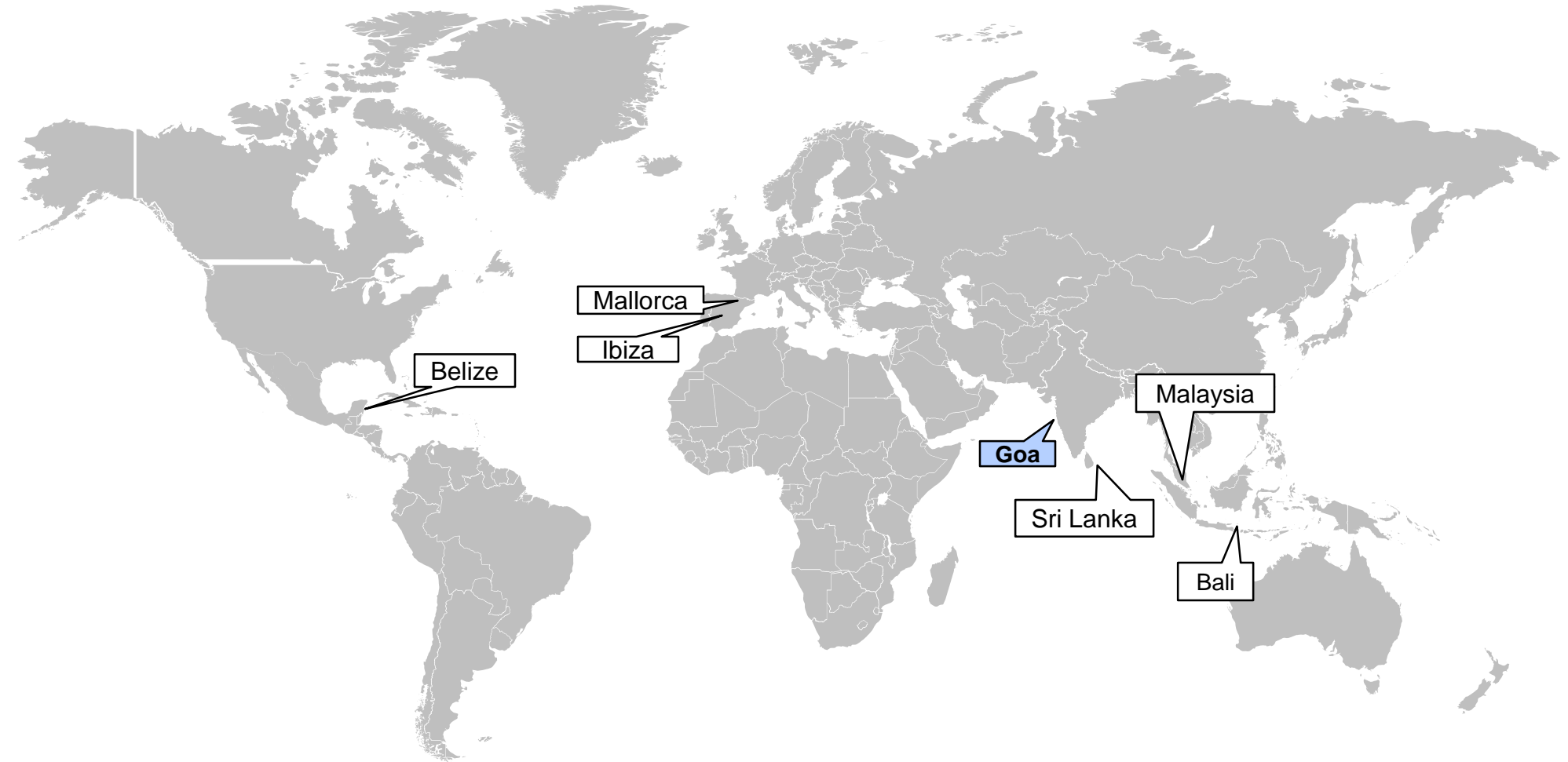
# Tourism Benchmarking

- Benchmarking locations as per destination life cycle phases
- Parameter comparison
- Comparison of USPs, target market, segments
- Key tourism products



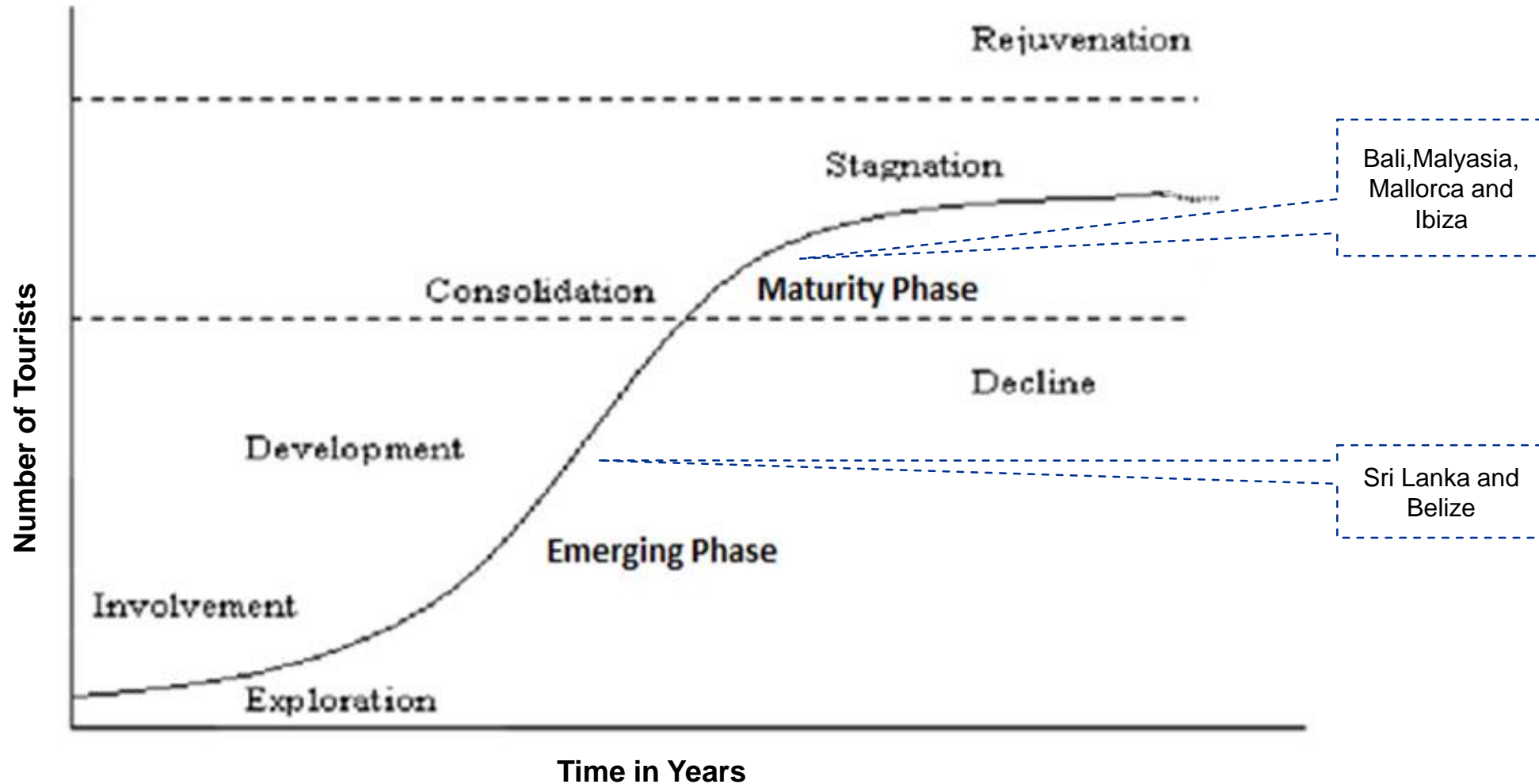
# Tourism Benchmarking

## Benchmarking Sites on world map



# Tourism Benchmarking

Benchmark locations across destination life cycle phases

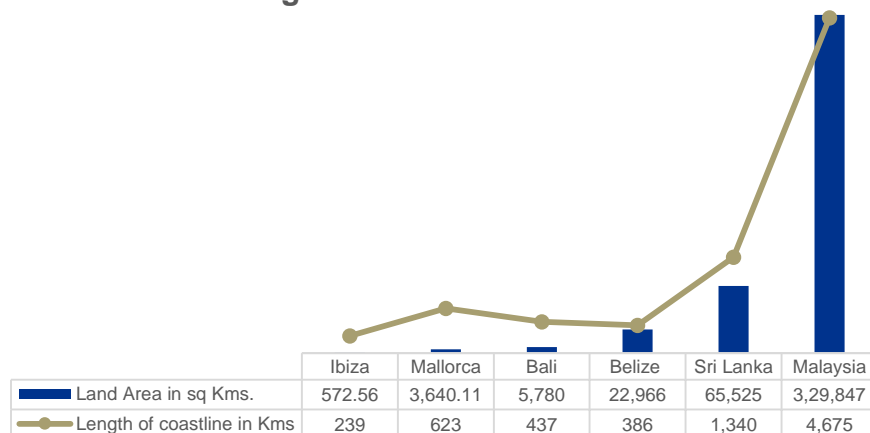


Source :Butler tourism destination life cycle (1980).South Asian Journal of Tourism and Heritage (2010), Vol. 3, No. 2, Destination life cycle assessment

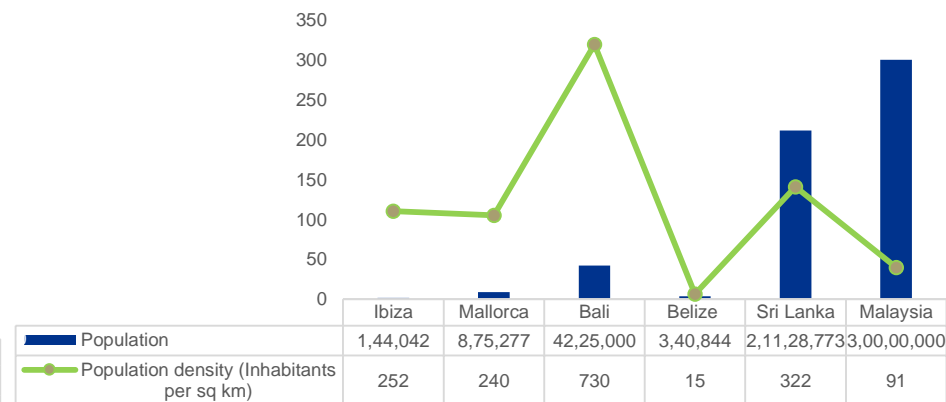
# Tourism Benchmarking

## Parameter comparison

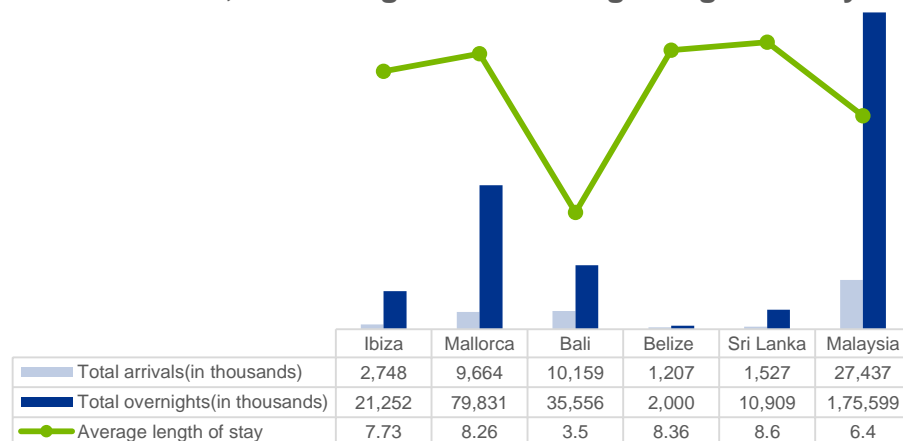
### Land Area and length of coastline



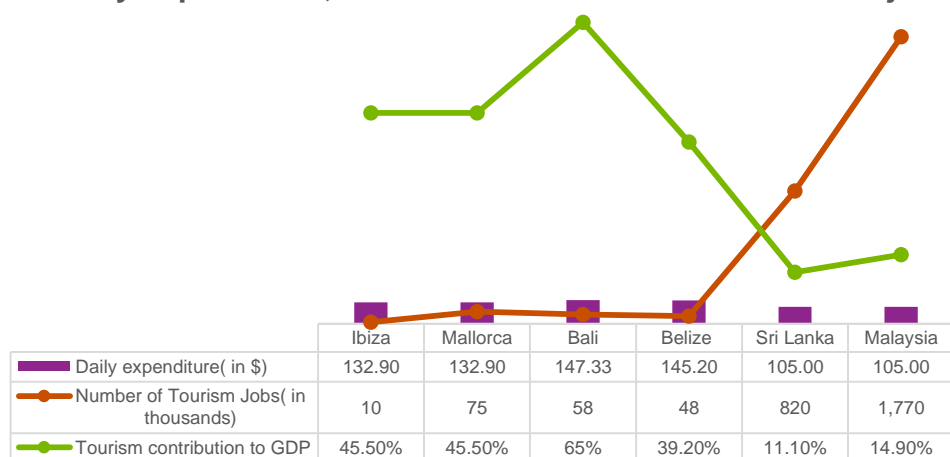
### Population and population density



### Tourist arrivals, tourist nights and average length of stay



### Daily expenditure, contribution to GDP and number of jobs



# Tourism Benchmarking

## USPs, Target Markets and Segmentation

|                            | Belize  | Mallorca   | Ibiza  | Bali  | Malaysia   | Sri Lanka  |
|----------------------------|---|--|--|---|--|--|
| Unique Selling Proposition | World's largest living barrier reef.<br>Large number of underdeveloped nature, culture and heritage (Mayan) sites | Beautiful beaches, landscapes, heritage, old rural estates<br>Mallorcan architecture in forms as rocky castles, mills, religious architecture. | Bustling nightlife, electronic music.<br>Known for it's summer club scenes<br>Port of Ibiza town is a UNESCO declared world heritage site. | Beautiful island with white beaches, mountains, temples, palaces<br>Several UNESCO declared heritage sites.<br>Availability of various high end luxury options. | Melting pot of various Asian cultures.<br>Unique for its richness of nature and religious diversity. | Stunning landscape, pristine beaches.<br>Captivating cultural heritage and unique experiences within a compact location. |
| Target Market              | North America ,UK, Germany, Italy, Netherlands, France, Spain, Belgium, Denmark, Sweden, Switzerland              | Germany, UK, Spain, Scandinavia, Benelux, Italy, Russia and the rest of Europe.  | Italy, Spain, Germany, UK, Scandinavia, Benelux, Russia and the rest of Europe..   | Australia, China, Japan, South Korea, Taiwan, Malaysia, Europe (mainly UK, France and Germany) and the US.  | Asian countries, especially from neighboring countries: Singapore Thailand and Indonesia             | Asia (India, Maldives, China, etc.) ,UK, Germany, France, Eastern Europe Middle East and North America                   |
| Segmentation               | Cruise visitors and overnight visitors  | The holiday market, meetings, sports, golf, exploration, health & wellness.  | Lifestyle related segments   | Families, couples, groups, surfer   | International visitors and youths  | International visitors   |

# Tourism Benchmarking

## Key Tourism Products

|                     | Belize  | Mallorca   | Ibiza  | Bali   | Malaysia  | Sri Lanka   |
|---------------------|---|--|--|--|---|---|
| Sun and Beach       | 80 miles of barrier reef provides great diving, snorkeling spots along with avenues for water sports.                         | Charming beaches and coves spread all over along with many water sports activities.  | Huge range of possibilities in both land and water based activities. Availability of excellent sailing facilities. | Black beaches and availability of various water sports activities.                                       | Plethora of Sun and beach activities.   | Beaches and expansive coastline. Ideal location for water sports.                                     |
| Cultural & Heritage | Heart of Maya civilization with thousands of Mayan ruins. Varied cultural experiences, ranging from Garifuna to Mayan dances. | UNESCO declared cultural heritage site. Presence of various caves, stalactites-stalagmites and adventure tourism products. | Capital city is UNESCO declared world heritage site. Various sites for hosting events.                             | Known as the land of a thousand temples. UNESCO listed three Balinese historical sites are present here. | Centre of Malay culture, crafts and religion. Transformation of cultural heritage mansions into boutique hotels | UNESCO has declared six archaeological World Heritage Sites in the country.                           |
| Nature & Ecotourism | Several waterfalls, jungle canopies, hiking trails for tourists.  | Melting pot of various cultures & civilization. Presence of rich Mediterranean heritage.                                   | Natural surroundings along with plethora of adventure activities   | Adventure activities e.g. Rafting down Ayung river Eco tours through mangroves etc.                      | Wildlife reserves, jungle trekking, caving, rafting, water-skiing, parasailing, river safaris .                 | 100+rivers, various lagoons and irrigation lakes create year-round potential for adventure activities |
| Others              | Wide array of adventure and cruise tourism related products   | Gastronomy, lifestyle & events are getting popular   | Popular nightlife, clubs with DJs from all over the world.   | Spas destination of South East Asia.   | Rich culture and promotion of local art.  | Special attraction for gastronomy delights.   |



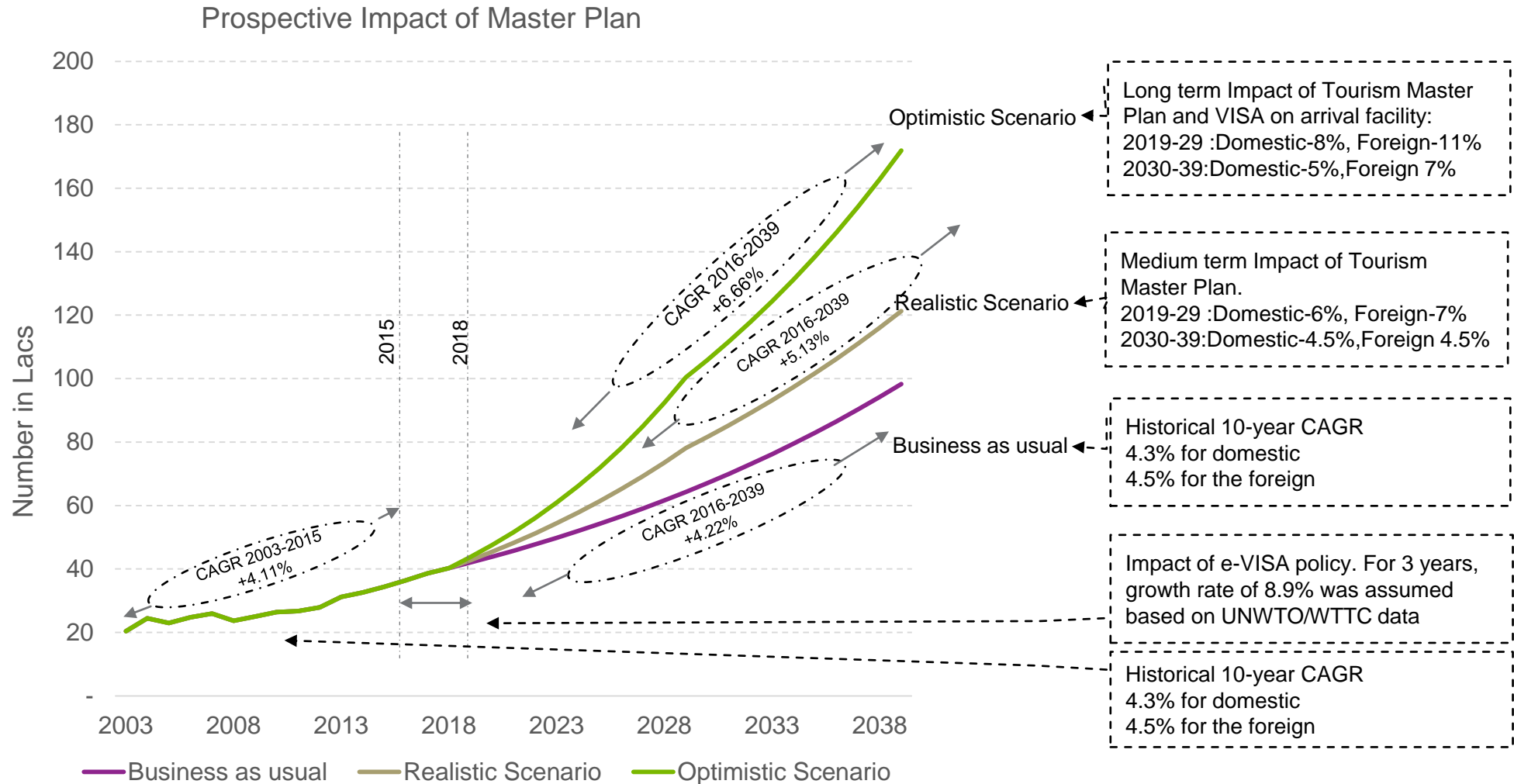
# Key Summary Points

- Scenario analysis
- Vision mission positioning
- Core and complementary products
- Market focus
- Key takeaways from Module 1
- Revised project timelines
- Permission to start Phase 2



# Key Summary Points

## Future potential – Scenario analysis





# Key Summary Points

## Vision, Mission & Positioning

### Unique Selling Proposition (USP):

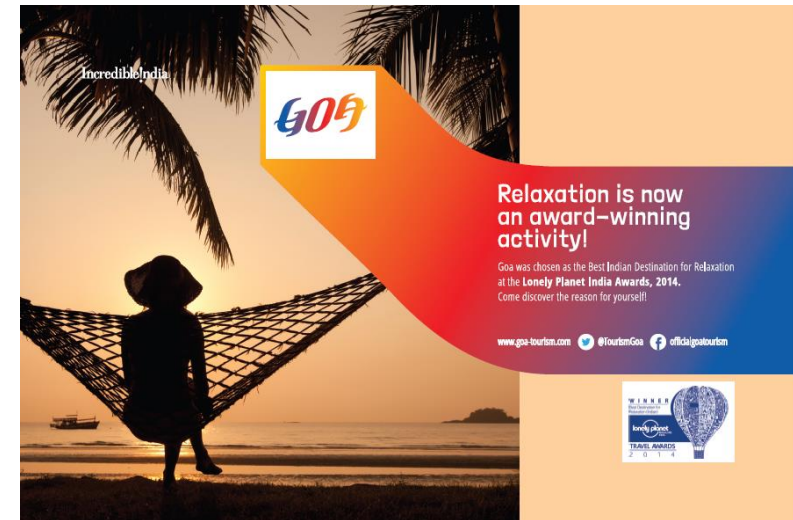
- **Tangible:** Colonial past blended with idyllic inland landscapes
- **Intangible:** Goan “Sussegado” lifestyle, reflecting the way they behave.

“Sussegado” can become a symbol as it is easy to remember and the lifestyle that it represents can be developed and applied in multiple ways throughout the whole territory and numerous tourism products.

This USP should be transmitted with a strong emphasis on “story telling” techniques.

### Differentiating factors:

- **“Beach relax & party”** :Goa is mainly known for its trance and beach parties that is very restrictive in terms of market segments’ attractions.  
However it is a strong differentiating factor, especially for the domestic market and should not be abandoned but up scaled and transformed into more and better experiences.
- **Mix of cultures:** Indian and Portuguese, as well as Arabic heritage, next to each other
- **Nature and culture** components are varied, spread out throughout the coast and inland and easy to reach (short distances)



# Key summary points

## Core and Complementary tourism products

### Core products



**Coastal (Sun & beach)  
tourism**



**Cultural/Heritage tourism**



**Nature Based/ Eco-  
tourism**

### Complementary products



**Culinary  
Tourism**



**Health &  
Wellness  
tourism**



**Nautical  
Tourism**



**Community  
Tourism**



**Leisure &  
Entertainment  
Tourism**



**Gaming**



**MICE  
Tourism**

# Key summary points

## Market focus and strategy

### Identification of the potential tourism markets and segments for tourism in Goa

| Markets     | Short Term | Medium Term | Long Term |
|-------------|------------|-------------|-----------|
| USA         |            | X           |           |
| UK          | X          |             |           |
| Germany     | X          |             |           |
| France      | X          |             |           |
| Russia      | X          |             |           |
| Australia   |            |             | X         |
| China       |            | X           |           |
| Japan       |            | X           |           |
| Middle East | X          |             |           |
| Domestic    | X          |             |           |

Based on

- Current core markets for Goa and India
- International connectivity-Direct Flights
- International tourism trends and segmentation

Travel motivations that fit with Goa's current and potential tourism mix

### Tourism strategy customized to target markets

#### Short term strategies

Creation of new products and "revamping" of some current products.

Increase the Average Length of Stay and average daily expenditure

Tap into the markets for short breaks and holidays with new direct flights from the Middle East.

#### Medium term strategies

Position the destination on the Internet with new tourism products in line with USP of Goa.

Propose new touristic products, facilities and packages to attract new markets and segments

Work with airline companies to increase direct flight numbers to Goa from big cities with tourist potential

#### Long term strategies

Target new markets such as China, Brazil and Portugal

Adapt products to new markets such as shopping malls with local/ Indian products



# Key summary points

## Key conclusions of Module 1

- Significant impact on Goa's economy and generates considerable employment.

### Employment generation



- Inflows have grown strongly over the last 5 years .
- Dependencies on certain **tourist segments, source markets & travel modes** e.g. charters

### Increase in tourist flow



- Goa's accommodation infrastructure is well developed.
- Focus on **quality and standardization** required. MICE facilities need to be further developed

### Improvement in facilities



- Strong potential with it's assets in culture and history, flora & fauna, landscape.
- **Maintenance** of cultural, heritage and natural assets is critical.

### Upkeep of Goa's natural history and assets



- Better connectivity within India and internationally has significantly improved tourists inflow with new direct connections being launched within the last year.

### Improving connectivity



- **Core products:** Sun and beach tourism, cultural and heritage tourism etc.
- **Complementary products** :health and wellness tourism, community tourism etc.

### Tourism product portfolio



- The extension of the e-t visa to several more countries is a significant opportunity and should be leveraged appropriately

### E-tourist visa



- Goa has a strong brand identity and brand recall.
- Up gradation of facilities and events, coupled with clear messaging to targeted segment is required.

### Emphasis on branding and promotions



## Key summary points

### Revised project timelines

| Module   | With gaps     | Without gaps  |
|--|---------------|---------------|
| <b>Module 1:</b> Current and projected tourism scenario in Goa and understanding key gaps        | 17-Jul        | 17-Jul        |
| <b>Module 2:</b> Tourism concepts to attract tourists to Goa                                     | 15-Oct        | 01-Sep        |
| <b>Module 3:</b> Development of Master Plan  | 15-Dec, 1-Feb | 16-Oct, 2-Dec |
| <b>Module 4:</b> Development of Tourism Policy   | 29-Apr        | 03-Feb        |
| <b>Module 5:</b> Review and recommendations on strengthening institutional and economic linkages | 29-Jun        | 04-Mar        |
| <b>Module 6:</b> Action plan   | 29-Aug        | 05-Apr        |

# Permission to initiate Phase 2

## Phase 2: Program management phase

The scope of work in Phase 2 was to commence on the completion of Phase 1 (Master Planning Phase) and included Program planning, Management of contractors & consultants, Governance structure, Resource deployment, Project management framework, monitoring and updates

*Considering the time taken for initiation of Phase 1, there are several critical initiatives which have already been taken up or are in the planning stages by the Department of Tourism in consultation with the consultant. These include*

- Marketplace for SME businesses
- Content development
- Destination marketing
- Tourist information and facilitation services
- Territorial tourism force
- Training module development
- Framework for development and implementation of events, illumination of tourist places, sponsorship and CSR initiatives

**It is suggested that Phase 2 be taken up immediately and the consultant be directed to deploy necessary resources. This will ensure quicker implementation of key tourism initiatives**



*cutting through complexity*

**T&L** TOURISM  
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**europaxis**

**Thank you**

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# Annexures

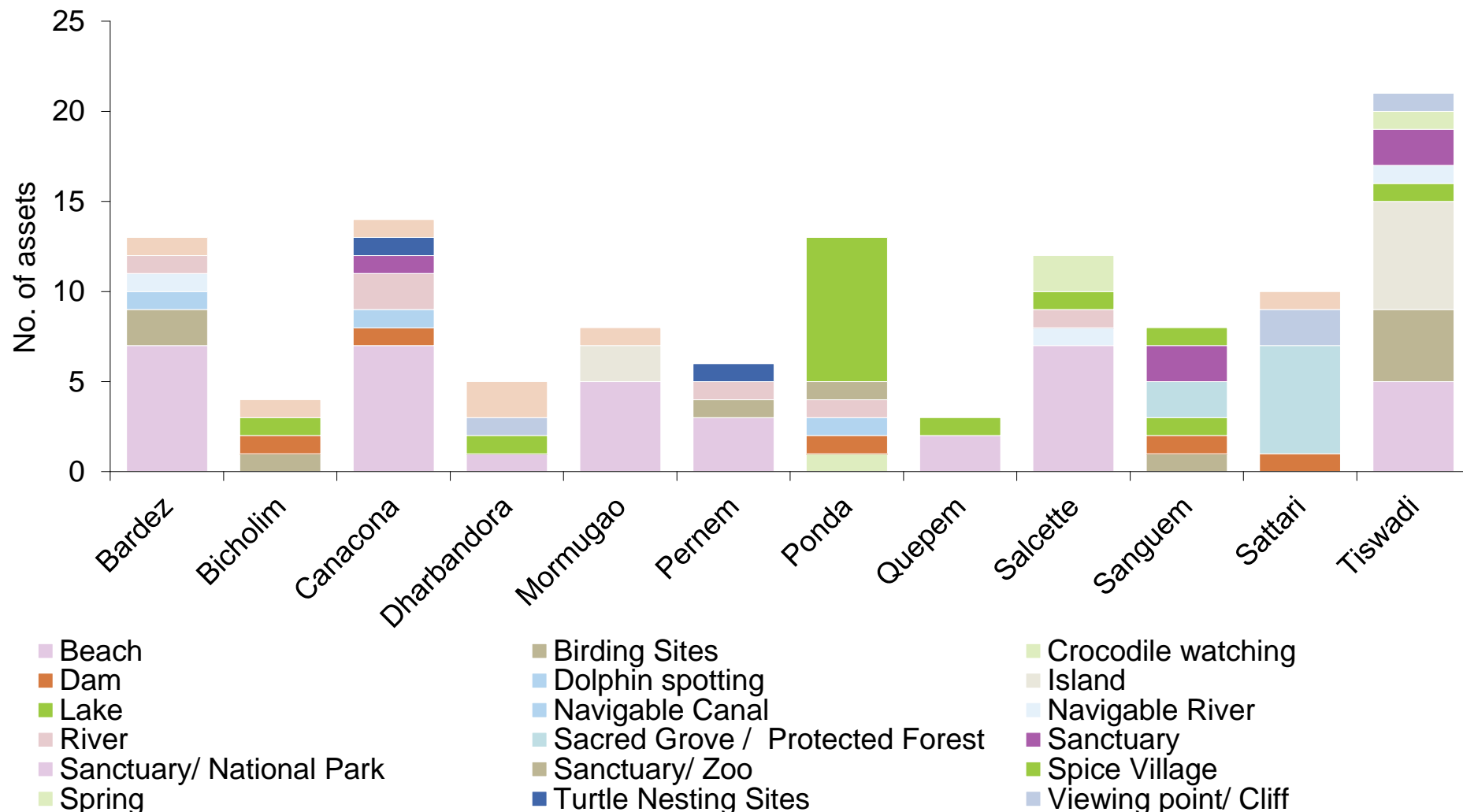
Tourism assets spread across Goa's Talukas

- Nature/ Wildlife/ Eco tourism Assets in Goa, spread across Goa
- Heritage/ Cultural and Pilgrimage tourism assets, spread across Goa
- Adventure tourism assets, spread across Goa
- Edutainment assets, spread across Goa



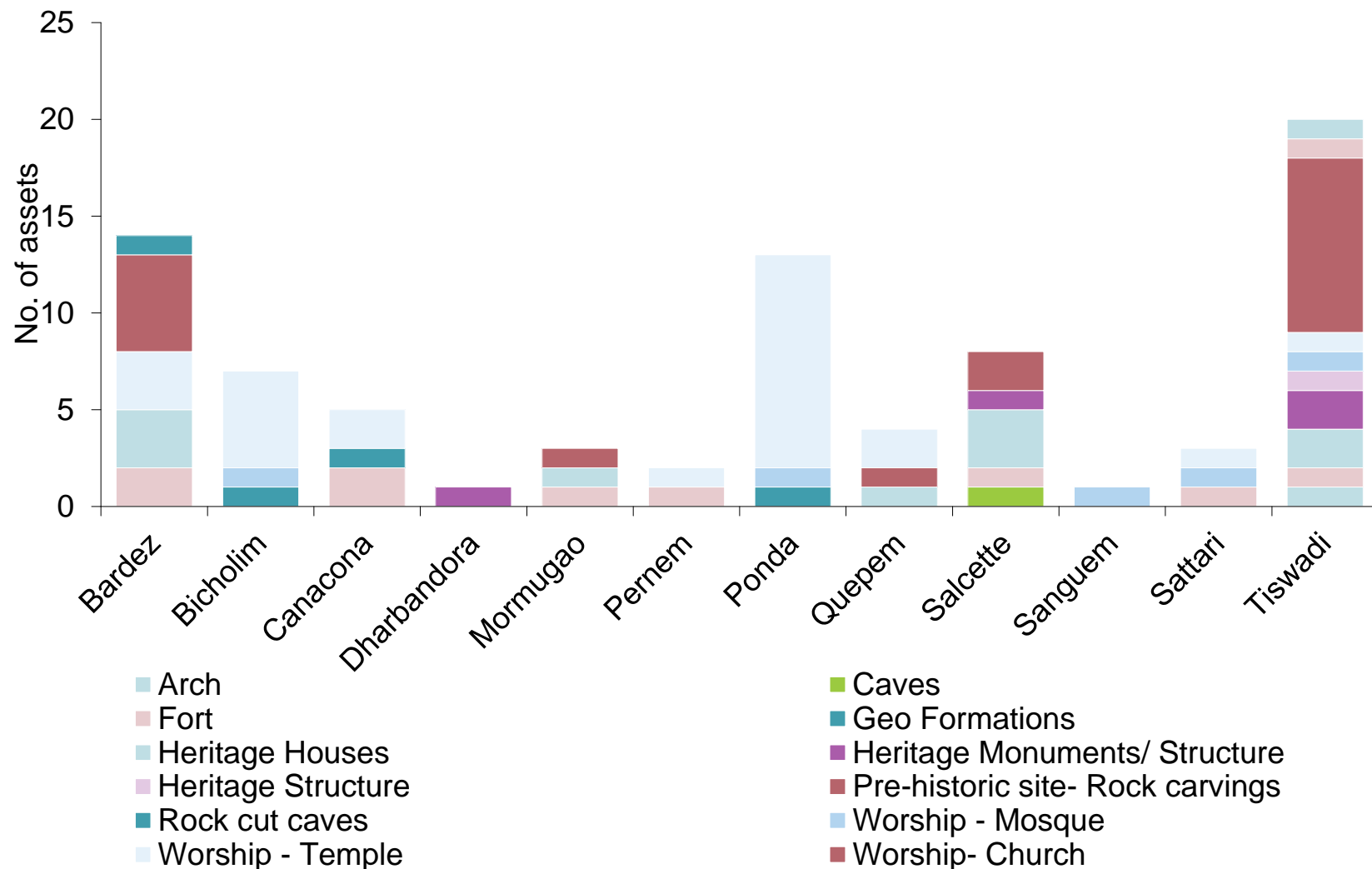
## Annexure: Tourism Asset spread across Goa's talukas

Nature/ Wildlife/ Eco tourism Assets in Goa, spread across Goa



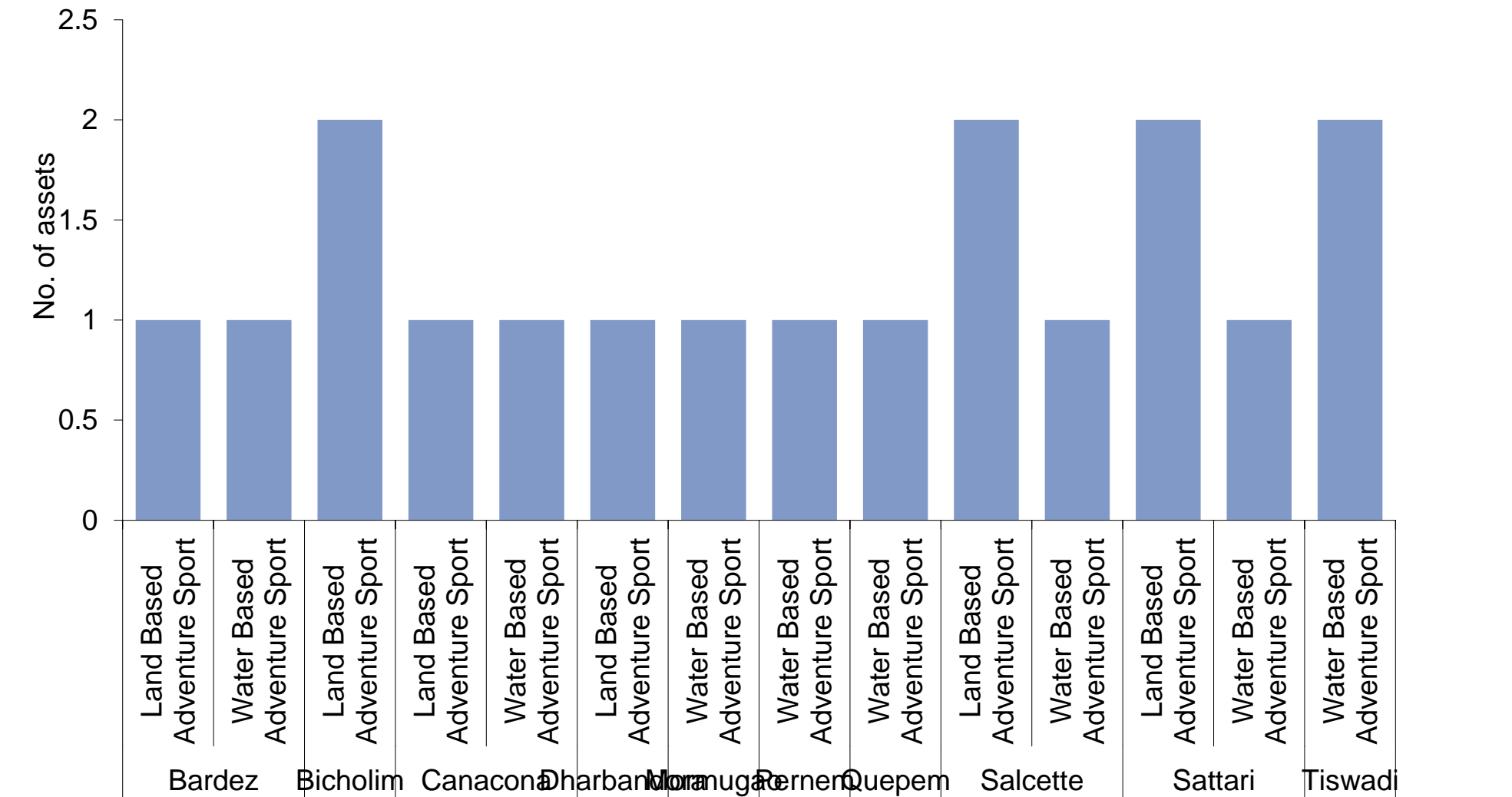
## Annexure: Tourism Asset spread across Goa's talukas

Heritage/ Cultural and Pilgrimage tourism assets, spread across Goa



# Annexure: Tourism Asset spread across Goa's talukas

## Adventure tourism assets, spread across Goa



## Annexure: Tourism Asset spread across Goa's talukas

Eduainment assets, spread across Goa

