



Preparation of Goa's Tourism Master Plan and Policy

Module 2 Report: Develop tourism concepts to attract tourists to Goa

**Department of Tourism, Government of
Goa**

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Goa



Disclaimer

- This presentation is being made to Department of Tourism, Govt. of Goa ('DoT') as part of the 'Module 2 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, 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.
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- Our analysis is based on the prevailing market conditions and regulatory environment and any change may impact the outcome of our review
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Module Coverage as per RFP

Sr. No.	Module 2 task as described in the RFP	Coverage in this report
1	Identification of local tourist places and nodes with possibility of its inclusion in circuit so as to strengthen the tourist stay	A study of Goa' tourism assets has been done by our team in the form of 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. These have been assessed for inclusion in tourist circuits to strengthen tourist stay.
2	Suggest specific tourism products for identified destination and node to be implemented both by Public and private sector.	This has been done after an in depth study of Goa's tourism assets and offerings, and keeping in mind the facilities and infrastructure in the state.
3	Develop profiles for each of the tourism product identified	An assessment of potential target markets and Goa's tourism growth strategy have been considered here. Also key international and national trends have been studied to develop the tourism product profiles.
4	Prepare criteria for ranking the project identified, in terms of importance / criticality for development of the circuits	This has been done based on the tourism assets and types across Goa as studied in detail in Module 1.
5.	To form tourist circuit as per needs of tourist, facilities and recreational facilities should be listed in circuit and additional facilities which are to be created for long stay of tourist.	Key international and national tourism trends as studied in Module 1 have been utilised for formulation of the circuits. In addition, core and support tourism infrastructure essential to promotion and development of the circuit has been outlined.

Module Coverage as per RFP

Sr. No.	Module 2 task as described in the RFP	Coverage in this report
6	Identify products in the nature, adventure, medical, wellness, heritage, culinary, crafts, agriculture, golf tourism segments at a taluka-wise level and after considering land availability and usage pattern	Data from various Government Departments – Tourism, Forest and Agriculture has been obtained and studied for this purpose, in addition to primary stakeholder interactions and secondary research. A spatial plan has been formulated basis this study.
7	Identify and suggest possible state intervention in terms of policy and other incentive's to be offered for channeling investments into the Tourism sector.	Based on a study of the existing policy framework and state initiatives, state interventions in terms of policy, operating guidelines, accreditation needs, safety, hygiene and quality standards are given in this submission Initiatives to channel investment in to tourism including subsidies, incentives, sponsorships and other financing options have been presented herein.

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Key Takeaways



Goa Tourism Offerings & Current Positioning

- Tangible and Intangible elements of Goa's tourism offering
- Product life cycle of tourism types of Goa
- USP's of Goa tourism



Various physical and emotional elements experienced by tourists while visiting Goa

Physical elements



Emotional elements



Unique Selling Proposition of Goa's tourism offering

Unique Selling Proposition (USP):

- **Tangible:** Colonial past blended with idyllic inland landscapes
- **Intangible:** Goan “Susegad” lifestyle, reflecting in the citizens way of life

“Susegad” is a sense that prevails across the Goan countryside, in its culture and traditions. It is professed as a way of life in Goa, and presents a feeling of general contentment and well being.

This way of life encompasses Goa tourism resulting in repeat visits to the state, many a times across generations.

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.

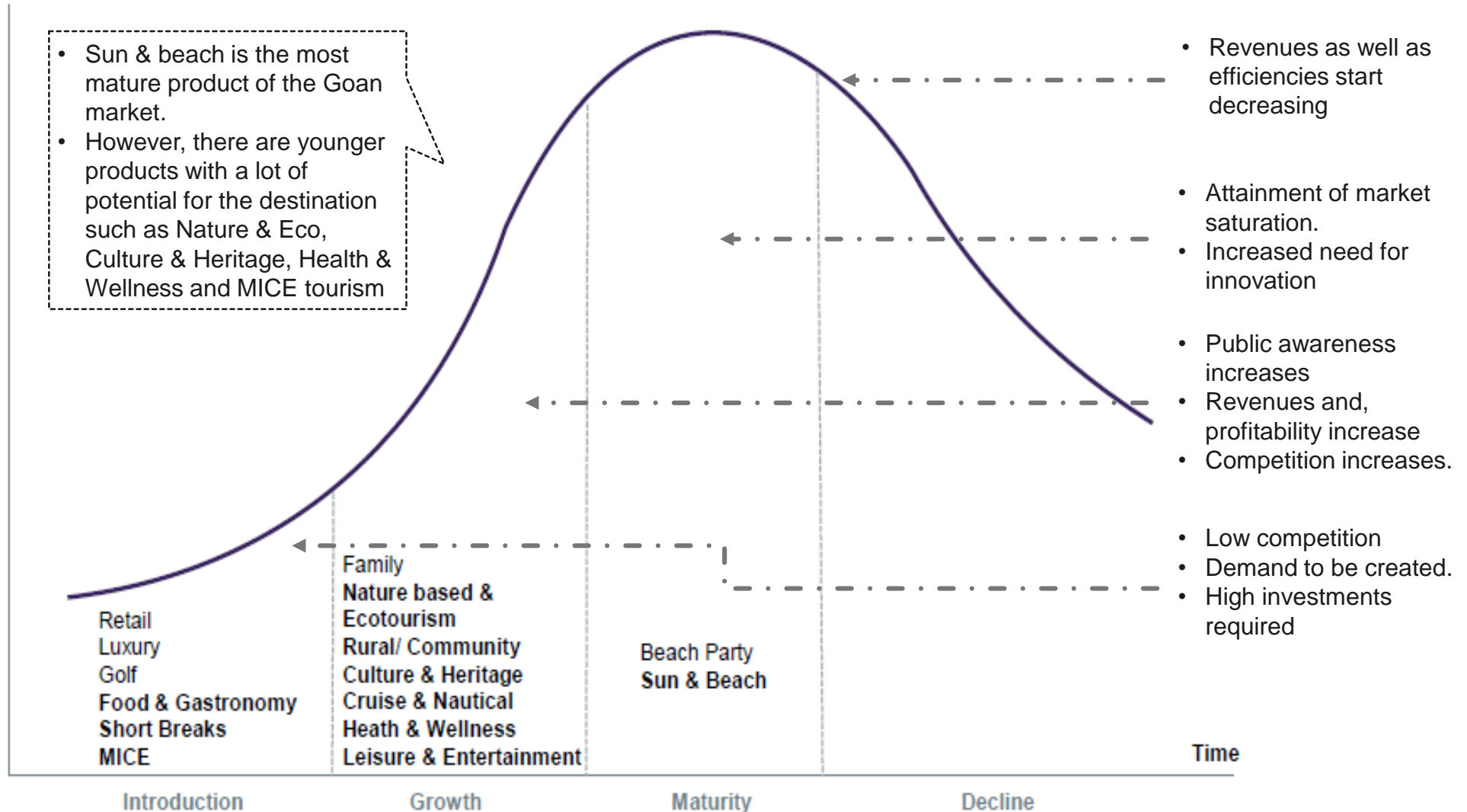
However it is a strong differentiating factor, especially for the domestic market and should not be abandoned but up scaled and transformed into more and better experiences.

- **Mix of cultures:** Unique juxtaposition of Indian, Portuguese and Arabic heritage
- **Nature and culture** components along the coast and hinterlands are varied, widespread and easy to reach (short distances)



Life cycle of Goa's tourism products and sub products

Volume



Strategic Objectives and Aspirational Vision for Goa Tourism

- Goa Tourism 2030
- Strategies to meet key objectives identified
- Core and Complementary tourism product strategy



How Goa should be seen in 2030

Sustainable



Tourism in Goa reconciles the environmental, social and economic demands, in order to be sustained for future generations.

Authentic



The Goan lifestyle and its unspoiled nature along with the confluence of different cultures and ethnic groups makes Goa a cultural melting-pot

Unique



Goa is unique for its combination of colonial heritage and 'Susegad' lifestyle with its inherent culture and cuisine

Seamless



Getting to Goa, staying and commuting in Goa is seamless and safe

Getting tourists to associate certain keywords with Goa is a key aim of the Tourism Master Plan

Domestic market

“Susegad” lifestyle
Bond with your family
Unique Goan culture and cuisine
Untouched nature – greenery and water
Entertainment / lively destination
Wellness destination
Heritage – churches, forts, petroglyphs and rock art
Active / passive adventure
Distinctive hospitality

Shared vision for Goa

‘Susegad’ lifestyle (relaxed attitude and enjoyment of life to the fullest)
World class experience
Distinctive hospitality
Local flavours
Portuguese heritage
Nature preserved
Entertainment/ lively destination
Active / passive adventure
Wellness destination
Sustainable
Nightlife

International market

World class experience
Portuguese heritage
Unique Goan culture and cuisine
Nature preserved
Nightlife
Sustainable
Wellness destination
Distinctive hospitality

Strategies for meeting each key objective need to be developed as part of this Master Planning exercise

Build a unique and competitive positioning

Diversify product portfolio and reduce dependence on the North Goa beach belt

Improving type of tourist demand and reduce seasonality

Build social and environmental sustainability

Create positive economic impact

Improve quality across the tourism value chain

Encourage SME businesses

Support business development and attract investment



Goa' tourism product offering strategy through segmentation into core and complementary products

Core products

- Key products which comprise the visitor experience in Goa.
- The main strategy focuses on the development of these main products as key demand stimulators.
- They have the potential to be highly competitive and attractive



Complementary & Transversal products

- Defined as products which strongly support the tourism offer.
- These enrich the diversity of the tourism offer and attract niche market segments.
- The complementary products strategy focuses on the products which have an important role to play to support the core products and at the same time to attract their own niche demands.

The background of the slide is a vibrant green landscape. In the upper left, a narrow, winding road curves through rolling hills. In the lower right, a wider, straight asphalt road stretches into the distance, with a red sports car driving away from the viewer. The road is flanked by lush green grass and some small trees. A large, semi-transparent blue triangle is positioned on the left side of the image, serving as a backdrop for the text.

Tourism products development

Core –Coastal, Culture/Heritage and Nature based ecotourism

Complementary-Community, Culinary, Cruise/Nautical

Short breaks, Health/Wellness, MICE and
Leisure/ Entertainment

Tourism Product Development

Exploring the core products of tourism in Goa

Coastal Tourism



- **Coastal (marine) tourism** includes recreational activities involving travel away from one's place of residence to locations having as their host or focus the marine environment and/or the coastal zone.
- Examples of activities undertaken include sand-dune surfing, beach volleyball, kite-flying, fishing, walking, skim-boarding or sand sculpting, shell-fish gathering, beach-combing and sun-bathing.

Cultural/ Heritage Tourism



- **Cultural/ Heritage tourism** involves traveling to experience places and activities that authentically represent the stories and people of the past and present. It includes historic, cultural and natural resources.
- It is oriented towards discovery of the cultural heritage of the tourist location.

Nature-based & Ecotourism



- **Nature tourism** involves travelling to experience nature and its environs.
- **Ecotourism** is responsible travel to natural areas that conserves the environment and improves the well being of local people. It is a nature based experience, which provides an educational and interpretive benefit to the traveler using sustainable measures to prevent degradation to the site, prevent loss of ownership by community and maintains it for future use.

Leisure & Entertainment Tourism



- **Leisure tourism** is a form of tourism where the primary motivation for travel is a vacation, away from everyday life. It is often characterized with staying in luxury hotels or resorts, relaxing on beaches or in a room or going on guided tours and experiencing local tourist attractions.
- **Entertainment** tourism can comprise of creation of retail facilities/ waterfronts/ local markets, theme parks and shopping festivals to engage tourists on vacation.

Tourism Product Development

Key initiatives for developing Complementary products in Goa's tourism offer

Community Tourism



- **Community tourism** focuses on active participation in the day to day lives of resident at the destination.
- In community tourism, local residents invite tourists to visit their communities with the provision of overnight accommodation.

Health & Wellness Tourism



- **Wellness tourism** is travel for the purpose of promoting health and well-being through physical, psychological or spiritual activities
- The term **Health tourism** refers to different forms of travel ranging from preventive and health-conductive, to rehabilitation and curative.

Culinary Tourism



- **Culinary tourism** refers to trips made to destinations where the local food and beverages are the main motivating factors for travel.
- Here consumers travel to places to eat and drink specific (usually local) produce

MICE and Wedding Tourism



- The term "**MICE**" in the context of travel is an acronym for Meetings, Incentives, Conferences and Exhibitions.
- Destination weddings are a key form of events gaining prominence in travel worldwide

Nautical Tourism



- **Nautical tourism** is an increasingly popular way to combine love of sailing and boating with vacation and holiday activities
- It includes several aspects of marine tourism such as sailing, yachting, cruising and diving, as well as harbor-side developments e.g. Marinas

Short Breaks



- **Short breaks** are defined as 'a non-business trip' for three to five nights away from place of residence (first home)
- These have been used to get away from life's routine and usually involve a few days away from home in a nearby location

Core product – Coastal Tourism

Coastal Tourism

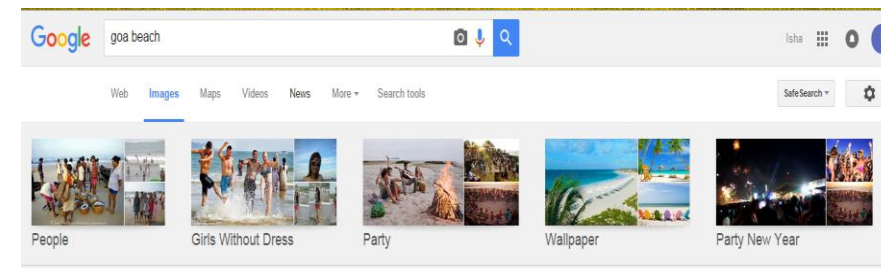
- Coastal tourism includes those recreational activities which involve travel away from one's place of residence. These have as their host or focus the marine environment and/or the coastal zone.
- Traditionally it involved passive usage of the beach and its environs, however it has now evolved into a form of tourism where tourists make active use of the environs through activities.

Product context

- “Coastal tourism” is “THE” tourism product Goa is famed for, not only nationally, but also internationally.
- Goa gained popularity worldwide for its idyllic beaches in the 1960s through the Goan hippy tribe movement’ genesis in Anjuna
- It has also historically been popular among domestic tourists across the country and especially the neighbouring states for its beaches and lifestyle.
- Visitors primarily indulge in swimming, resting and relaxing on the beach coupled with beach parties and nightlife
- The state is also seeing high degrees of alcoholism and drug abuse on certain beaches, and is gaining popularity as the “Vegas of India”.
- Going forward, Goa needs to understand that in response to changing travel trends, coastal destinations which diversify their supply and integrate it with their inland areas display increased resilience to competition, and are more likely to succeed sustainably.

Key gaps

- In spite of reaching maturity on the tourism life cycle, coastal Goa is experiencing uncontrolled mass tourism and remains unimaginative.
- North Goa beaches across Bardez and parts of Pernem and Tiswadi are seeing mass tourism with scant regard for environment conservation
- Sites known for turtle nesting are seeing a diminishing headcount
- Waste management, fire safety, noise and soil pollution are key issues plaguing well frequented areas.



Core product – Coastal Tourism

Coastal tourism has taken the shape of holiday demand in coastal and marine environments with diversified motivations and inclusion of more active activities.

In response to new trends of an increasingly demanding, classy and segmented demand where each tourist has a different motivation for experiencing the marine / coastal environment, Goa should aim to provide avenues for each motivation .

Relaxation &
Rejuvenation

Wildlife/
Ecotourism

Recreational
Activities/
Sports

Heath &
Wellness

Business

Weddings
and Events

We propose an
enhanced
Product Value
Proposition for
Coastal Goa

- Deriving **inspiration** from the “**Susegad**” (relaxed atmosphere) philosophy, Goa should be **converted progressively** into a **Coastal Discovery, Experience & Lifestyle destination**
- In this evolution, **Goa will continue to be a Beach Party spot but with upgraded facilities and experiences for different tourist motivations.**
- It would involve not only developing luxury and ultra luxury offerings, but also ensuring Goa attracts a wide range of tourists with different spending capacities, motivations and interests.
- Infrastructure improvements envisaged – beach access, cleaning, maintenance, water, electricity, sewage, regulation and upgrade of small retail (stalls)/ markets selling souvenirs and parking areas.

Emphasis on
high quality
Coastal Tourism
infrastructure
and facilities

- The Coastal tourism vision lays great emphasis on raising the quality, safety and sanitation level of the whole coast.
- **Quality labels for activities/ experiences and accommodation** should be implemented across Goa to guarantee a best in class experience to visitors, thus encouraging repeat visits.
- Representative Quality improvements for activities/facilities and experiences along the coast:
 - Nautical Stations in Spain (www.estacionesnauticas.info)
 - The Blue Flag voluntary label (www.blueflag.org)

Core product – Coastal Tourism

Tourism Development Intensity

Very low density development & Protected Areas

- Pristine beaches in certain talukas to be protected from high pressure in terms of possible development through ultra luxury offerings
- Some beaches to be partially preserved to maintain the existing marine eco system, e.g.: turtle nesting.



Low - Medium Tourism Development

- In less developed areas, the quality of tourist accommodation, facilities and activities should be upgraded/ developed to provide a better visitor experience.
- This is aimed at improving Goa's competitiveness as a coastal tourism destination.



Mass Tourism Development

- Mass tourism, if not properly managed destroys attractiveness
- In order to improve the most developed coastal areas of Goa, efforts need to be taken to upgrade/ organise the existing product and enhance the tourist experience.
- Sporting events can be promoted to decrease seasonality



Density models – Built up unit(s) (apartment/ room) built per land unit(s), thus shaping the landscape and scenery

Untouched nature



Low density (5 - 20 units)



Very Low density (~4 units)



Medium density (21- 40 units)



High density (60+ units)



Area Development Density (units/ acres)

Accommodation classification applicable to the Coastal Tourism Value Proposition

Hotel

- >200 keys
- Rooms and suites
- Provides a focused experience around one signature amenity or anchor attribute
- Beach Club



Destination Resort

- 100 - 200 keys
- Rooms, suites and villas
- Large number of captive guest attractions and activities
- Real Estate component/development (optional)
- Nautical activities
- Direct access to the beach



Low Density developments

- <100 keys
- Rooms, suites and villas
- Boutique hotels
- Located in special interest and preserved / protected areas
- Nature activities
- Sustainability
- Environmental and social promotion



Other Accommodation

- Surf camps
- Camp sites
- Vacation cities
- Beachside shacks combined with accommodation facilities
- Low impact accommodation



Core product – Coastal Tourism

Tourist segments attracted

Demographic

Seniors	✓
Family	✓
Solo	✓
Couples	✓
Groups	✓

Lifestyle

Discovery	✓
Feel alive	✓
Trendsetters	✓
Wellbeing	✓
Cultural	
Nature lovers	✓
MICE	✓

Product Features: Activities/ Experiences proposed for Coastal Tourism

Activities / Experiences	Type		Facilities / Services	
	Active	Passive	Indoor	Outdoor
Sunbathing/ Lounging		✓		✓
Destination Weddings		✓	✓	✓
Heath (Yoga) and Fitness	✓	✓	✓	✓
Wellness and Rejuvenation (Spa)		✓		
Meetings		✓		
Incentives/ Corporate Outbound	✓	✓	✓	✓
Boat/ Catamaran tours-coastal sightseeing		✓		
Wildlife/ Eco tours – dolphins, turtles, fish	✓	✓		✓
Sunset cruises		✓		✓
Swimming	✓			✓
Scuba diving	✓			✓
Snorkelling	✓			✓
Water-skiing	✓			✓
Paragliding/ Parasailing	✓			✓
Yachting/ Sailing	✓	✓		✓
Fishing/ Angling/ Deep sea fishing	✓			✓
Surfing / Windsurfing / Kitesurfing	✓			✓
Jet-skiing	✓			✓
Banana boat	✓			✓
Kayaking	✓			✓
Wakeboarding / Knee-boarding	✓			✓
Paddle	✓			✓

Goa already offers a wide range of Coastal Tourism activities, however the level of the facilities proposed should be upgraded in general and should also work with labels and certifications (focused on safety/ accreditations)

Core product – Coastal Tourism

Territorial vision



Mass tourism development



Low- Medium tourism development



Very Low density development & Protected Areas

Very low density resorts developed and or operated by international brands to better position the destination with **sustainable projects**, e.g.:

- Banyan Tree (www.banyantree.com)
- The Oberoi (www.oberoihotels.com)

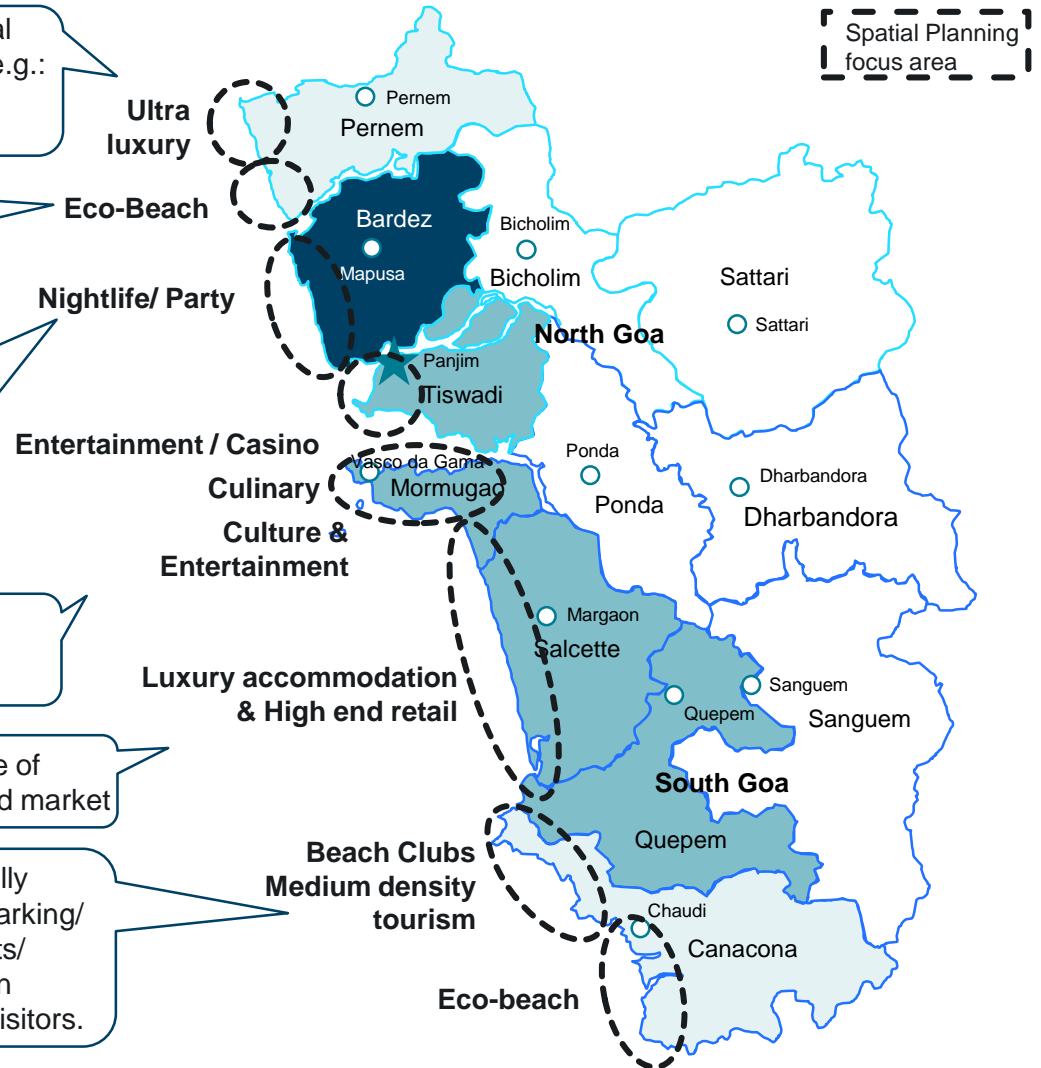
“Marine nature and life parks” - Partially preserved beaches to offer an adapted environment for flora and fauna (terrestrial and marine).

- **“Big club” resorts** include rooms & entertainment to attract a high level of tourists in a controlled and safe area (Ushuaia Ibiza)
- **New generation campsites** with modern facilities and offerings located on the second line from the beach (playamontroig.com)
- **Beach Clubs**, e.g: Nikki Beach (www.nikkibeach.com)
- Quality programmes to manage pollution levels, cleanliness and sanitation and Definition of swim zones

- **Festivals/ beach events** including cultural, cuisine and sporting events to market Goa through the year
- **Themed amusement parks**

Low density resorts with a mix of real estate units offering a wide range of activities such as wellness and water-sports dedicated to a med/high-end market

Integrated leisure destinations - Proposed for 3 or 4 beaches. Typically include beach access/ security/ cleaning/ quality of sea water/ toilets/ parking/ creation of jetties/ square with F&B facilities/ Beach clubs/ small markets/ watersports facilities including schools (sailing, surf, board) as part of an integrated project to welcome tourists and in particular day sea cruise visitors.



Spatial Planning focus area

Core Product-Coastal Tourism

Mixed-use development
Laguna Phuket, Phuket



Rooms & suites
Ushuaia Beach Hotel, Ibiza



Marina
Soma bay, Egypt



Water & nautical sports
Soma Bay, Egypt



Nature integration
Banyan Tree, Mayakoba



Environmental protection
Banyan Tree, Bali



Relax
The Oberoi, Lombok



Complementary activities
Six Senses, Con Dao



Bungalows
Kalinaw Resort, Siargao



Camping plots
Playa Montroig Camping Resort, Costa Dorada



Integrated with nature
Huttopia, Versailles



Relax
Kalinaw Resort, Siargao



Core product - Coastal Tourism

Key takeaways

- Coastal tourism worldwide is moving away from its traditional form of rest and relaxation on the beach to a much more involved form of tourism with visitors approaching coastal tourism with widely varying motivations.
- The need of the hour for Goa's coastal tourism scene is development of a wide variety of activities for different tourist motivations
- Innovation, quality, safety and security are seen as key tenets for sustainable development of Goa' coastal tourism in an increasingly competitive global coastal tourism scenario
- It is proposed that Goa's coast is developed through segregation into low, medium and high density tourism development areas with activities and accommodation types broadly defined as per the area
- It is envisaged that the overall quality of the existing infrastructure is improved to bring it on par with best in class products, with a special emphasis laid on safety and security
- Guidelines would be issued towards quality labels and accreditation norms for proposed developments



Core product – Culture & Heritage

Product definition

Cultural & Heritage Tourism

- It is a form of special interest tourism driven by a search for new cultural experiences, be it aesthetic, intellectual, or emotional. These holidays are motivated by journeys aimed at the discovery and/or study of tangible and intangible cultural experiences at the destination.
- Recent trends indicate that culture and heritage tourism is a source of cultural promotion combined with economically sustainable development and general wellbeing of the local populace.

Cultural/ Heritage tourism assets

Tangible

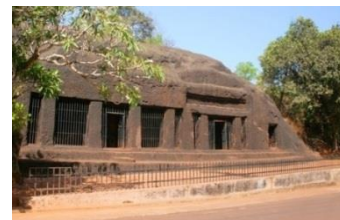
- Monuments
- Archaeological sites
- Museums
- Interpretation Centres
- UNESCO World Heritage site – Old Goa Church Complex
- Sacred Groves
- Ancient Temples

Intangible

- Handicrafts and visual arts
- Social practices and festive events
- Music and performing arts
- Oral traditions and expressions
- Gastronomy & Culinary Practices

Key value proposition for Goa

- More than 400 years of Portuguese colonisation, remains of tangible and intangible cultural assets give a special flavour to Goa as an authentic, different / exotic and friendly local experience
- Cultural & Heritage Tourism is one of Goa's key tourism assets, allowing it to differentiate its offering from other competitive destinations (both local and international)

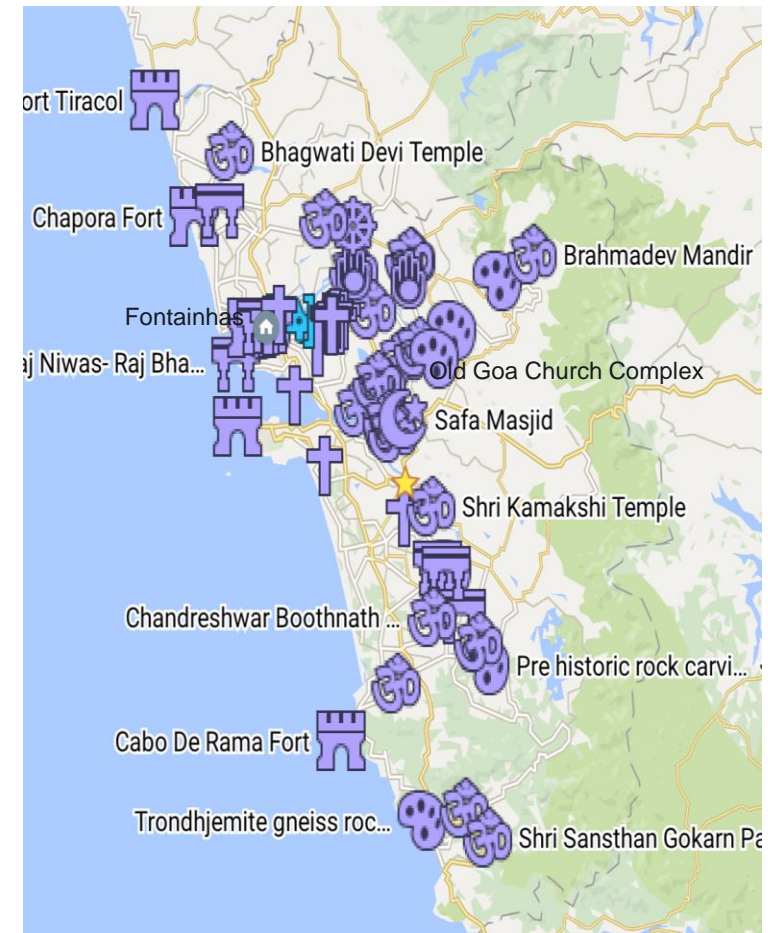


Core product – Culture & Heritage

Current scenario in Goa

Goa was the biggest Portuguese centre in India and boasts of a rich heritage through monuments, religion, traditions and lifestyle. There is a mix of tangible and intangible heritage and modern culture that attracts many tourists.

- **Churches:** The state is dotted with many churches attracting tourists from both, domestic as well as the international markets. Some key churches include Se Cathedral, Basilica of Bom Jesus, Church of Our Lady of the Immaculate Conception, Church of St Francis of Assisi and Church of St Cajetan
- **Forts:** There are several important forts across the state, reminiscent of the state's interesting history. Some key forts include the ones at Chapora, Aguada, Terekhol, Reis Magos and Mormugao.
- **Temples:** Goa is also popular among religious tourists for its picturesque temples, including Shri Mahadeva temple at Tambdi Surla, Shri Saptakoteshwar temple, Mangueshi temple, Maruti temple, Shri Damodar temple, Mahalaxmi temple and Shri Chandreshwar Bhutnath temple.
- **Ancient finds:** Goa has few ancient finds of archaeological significance including the Aravalem caves and Stone age rock carvings at Pansaimol
- **Festival & Events:** Goa celebrates many festivals and events which provide a glimpse of uniqueness of its heritage along with the modern trends like Goa carnival, Shigmotsav, Lairai Zatra and the International Film festival.
- **Heritage Houses:** There are many residential houses inspired by European architectural style which attracts many tourists, especially in areas like Fontainhas, Chandor and Loutolim e.g. Voddlem Ghor, Salvador Costa Mansion



Key areas for improvement

- ✓ Maintenance and development of assets and supporting infrastructure
- ✓ Development of information kiosks/interpretation centres/ training of guides
- ✓ Promotion of Goan culture and heritage across media
- ✓ Development of new tourism products in this segment

Core product – Culture & Heritage

Key tourists segments for culture/heritage tourism

Seniors	Families	Solo	Couples	Groups	Discovery	Feel alive	Trend-setters	Wellbeing	Cultural	Nature lovers	MICE
✓	✓	✓	✓	✓	✓		✓		✓		

Demographics ☐ Lifestyle ☒

Product offerings to attract various market segments

Product improvement of the existing asset base

Conservation of assets	Restarting the programme launched by the state in 2010 where a list of heritage buildings in Goa was prepared in order to classify heritage structures and undertake conservation / restoration measures.
Redevelopment of current assets	Goa has several cultural and heritage assets that may be turned into organized cultural products after conservation, e.g : conversion into accommodation, art gallery, event spaces and organization of other activities
Events throughout the year	Marketing and promotion of various events throughout the year by region/ taluka can help in decreasing the seasonality of tourist arrivals

Product innovation and development of new products

Tourism Circuit/ Route Development

- Discovering the heritage influence from the colonial days and other Goan dynasties: houses, forts and churches
- Focus on religious tourism and various festivals : churches/ temples ,feasts, zattras
- Few international examples
 - Ruta del Califato, Spain
 - European Institute of Cultural routes (culture-routes.net/routes)

Interpretation centers and accommodation infrastructure

- Development of interpretation centres and museums in an effort to raise awareness and provide edutainment experiences
- Development of accommodation facilities such that it helps in promoting and preserving heritage sites and local culture
- Few international examples :
 - The culture and heritage museums in York county
 - Hongkong heritage museum

Core product – Culture & Heritage

Product Features: Activities / Experiences proposed for Goa

Activities / Experiences	Type		Facilities / Services			
	Active	Passive	Indoor	Outdoor	Permanent	Temporary
Sightseeing of heritage sites (forts, palaces, houses, monuments, buildings, churches, temples, mosques)		✓	✓	✓	✓	
Routes / circuits	✓	✓		✓	✓	
Museums		✓	✓		✓	
Interpretation centres	✓	✓	✓	✓	✓	
Theatres		✓	✓		✓	
Handicraft markets		✓	✓	✓	✓	✓
Fairs		✓	✓	✓		✓
Celebration of local festivals	✓	✓		✓		✓
Carnival	✓	✓		✓		✓
Cultural performances	✓	✓	✓	✓	✓	✓
Workshops	✓		✓	✓	✓	✓
School visits		✓	✓	✓	✓	✓

Various events across the year

January	February	March	April	May	June	July	August	September	October	November	December
Feast of Three Kings	Goa Carnival	Shigmotsav Festival	Goa Food and Cultural Festival	Goa Cashew and Coconut Fest	Sao Joao	Chikhal Kalo	Bonderam Festival	Ganesh Chaturthi	Dussehra	Diwali Tripurari Poornima	Christmas, New Year Eve

Various types of tourism routes/circuits

Military: Forts	Religious : Churches/ Temples	Portuguese heritage/ legacy (Houses)	Goa Old Town (City tour)	Charming villages	Gastronomy route (including Feni & Wine)	Handicrafts route in villages (‘Azulejos’ Tiles, Coconut, Woodcraft, Terracotta)	Prehistoric sites (Petroglyphs)
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Tourist activities with spatial map for Goa

Routes and Circuits

- Key heritage / cultural and pilgrimage tourism assets appear to be concentrated around the central region of Goa, particularly in Bardez, Tiswadi, Ponda, Mormugao and Salcette talukas.
- Different routes / circuits need to be created showcasing tourism assets across these talukas.

Varied routes/ circuits

Route / circuit discovering the Goan legacy/ heritage: houses, forts, churches, monuments, blgs.

Route / circuit of the temples

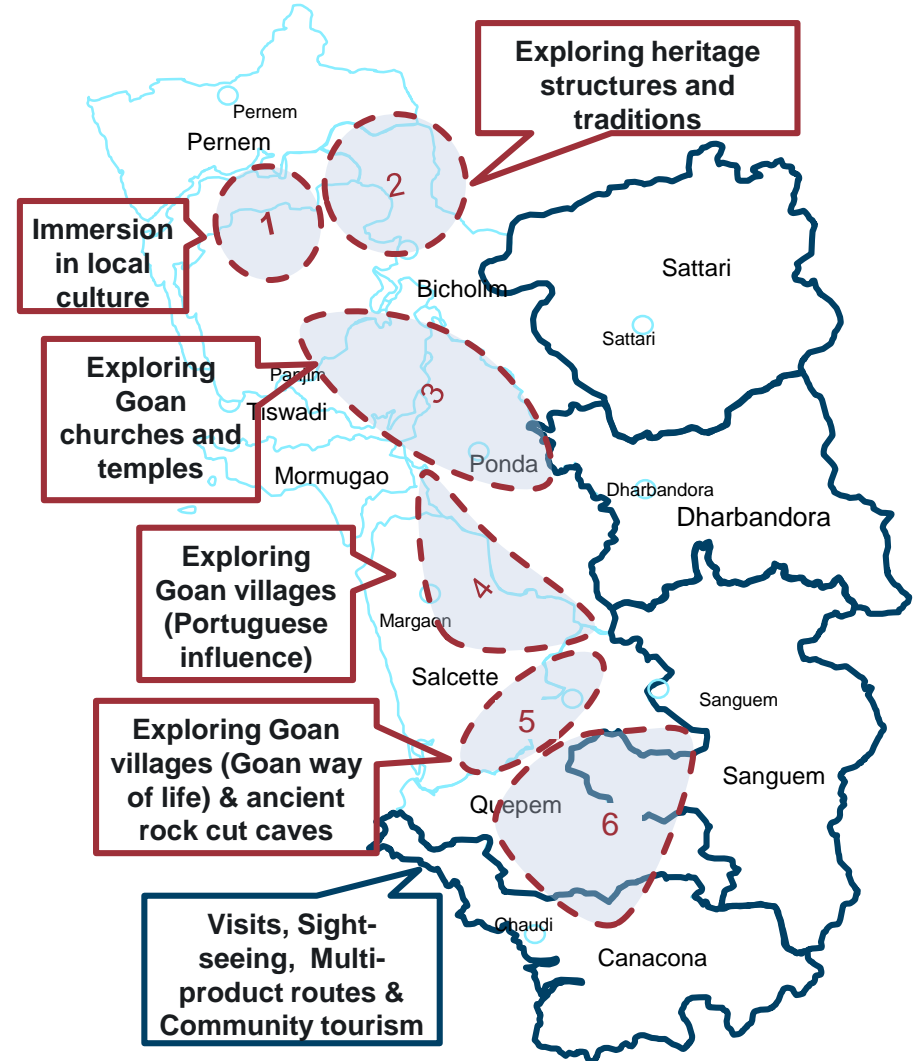
Village walks – Chandor, Siolim, Pernem and Divar

City/ Town tours – Panaji, Margao, Mapusa, Old Goa and other major cities/ towns

Museums, theatres, interpretation centres and event venues located at key tourist spots in the talukas.

Homestays, Visits, Sightseeing & Multi-product routes

- A different strategy is proposed for talukas with presence of isolated assets (Bicholim, Sattari, Dharbandora, Sanguem, Quepem and Canacona). Day excursions / visits can be organized from nearby towns / villages. Or these assets to other themed and/or multi-product routes/ circuits.
- Alternately immersion in the local culture can be facilitated through the medium of community tourism, primarily homestays and visits



Core product – Culture & Heritage

Key Takeaways

- Goa has a strong Portuguese influence in its culture and boasts of a rich heritage with an expanse of tangible and non-tangible assets spread all over the state.
- It is home to a UNESCO world heritage cultural site which may be promoted globally.

Measures required for developing Cultural/Heritage tourism

- Conservation and transformation of heritage assets** into organized cultural products.
- Tourist circuits/routes** need to be created with focus on either Portuguese influence on Goan culture and heritage or religious tourism
- Development of interpretation centers, museums, signage** can improve upon the edutainment aspects of culture/heritage tourism
- Promotion of various events** round the year to reduce the tourism seasonality



Core product – Nature-based & Ecotourism

Product definition

- Nature Tourism refers to all types of experiences and activities within a nature-based environment. It can result in both mass and niche tourism.
- Ecotourism goes a step beyond and helps to reduce the negative impacts of tourism by developing products, activities and facilities that safeguard and enhance local environments, biodiversity and culture. It gives an authentic experience to the traveller while sharing moments with locals to better understand their culture. By definition ecotourism will not include mass tourism.
- Ecotourism is defined as "responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education" (The International Ecotourism Society, 2015). Education here is meant to include all stakeholders.



Nature Based & Ecotourism

Nature Tourism	Adventure Tourism	Community Tourism*	Agri / Agri-Eco Tourism*
<ul style="list-style-type: none"> • Scenic routes • Discover local wildlife • Avi Tourism • Bird watching • Snorkelling • Discovery of the forest, walking, promenade • Sightseeing: waterfalls, viewpoints • River cruise • Stargazing 	<ul style="list-style-type: none"> • Cycling • Trekking/ Hiking • Bungy Jumping • Climbing • Via ferrata • Gliding • Canyoning • Rafting • Scuba Diving** • Surfing** • Kite Surfing** 	<ul style="list-style-type: none"> • Live close to locals • Discover local villages • Share local meals • Work with the locals 	<ul style="list-style-type: none"> • Discover local farms • Accommodation in farms • Agritourism is a way for the farmers to have extra revenues from the tourism industry

*These products will be developed in the complementary product section for Goa

**These activities are included in Sun & Beach Product

Core product – Nature-based & Ecotourism

Product description

Current assets

- Goa has a variety of nature & ecotourism options, especially in the hinterlands - waterfalls, wildlife/ bird parks, endemic reptiles, amphibians and insects, tropical forests, rivers, lake and viewpoints.

Key gaps

- Goa is part of the Western Ghats, UNESCO World Heritage sites (WHS), however none of the wildlife areas have been declared WHS in Goa, where as in Karnataka and Kerala there are 10 and 20 respectively.
- Nature Tourism is promoted inadequately among tourists, as the main motivation to come to Goa is Sun & Beach. Nature assets are also underrated and underused today
- Existing facilities and activities need to offer an enhances tourism experience, including integrated and complete options in accommodation, routes & circuits, and interpretation centres.
- Tourists are looking for a thrilling and complete experience of Goa and the level of the activities and the facilities proposed should be monitored through labels and quality certifications



Core product – Nature-based & Ecotourism

Proposed Activities / Experiences for Goa

Product Future Seasonality potential		Activities / Experiences	Type		Facilities / Services				Existi ng	Non existing
			Active	Passive	Indoo r	Outdo or	Perma nent	Tempo rary		
January	Temp. rises (hot and humid)	Sightseeing of natural assets (waterfalls, viewpoints) and scenic routes		✓		✓	✓		✓	
February		Nature trails -forest / jungle (walking, trekking, hiking)	✓			✓	✓		✓	
March		Wildlife sanctuary		✓		✓	✓		✓	
April		Bird watching		✓		✓		✓	✓	
May		Stargazing		✓		✓	✓			
June	Monsoons -Water- related activities may flourish	Insects/ amphibian watching		✓	✓	✓	✓			✓
July		Quad-bike expeditions	✓			✓	✓		✓	
August		Cycling	✓			✓	✓		✓	
September		Bungee Jumping	✓			✓	✓		✓	
October		Mountain and rock climbing	✓			✓		✓	✓	
November	Comfort able weather for outdoor activities`	Via ferrata	✓			✓		✓		✓
December		Gliding	✓			✓		✓		✓
		Canyoning	✓			✓		✓	✓	
		Rafting	✓			✓		✓	✓	
		Angling	✓			✓		✓	✓	
		Ballooning		✓		✓		✓	✓	
		Themed Adventure Parks	✓			✓	✓		✓	
		Bike park, Enduro park	✓			✓	✓			✓

High
 Medium
 Low

Even though Goa already has a wide offering of activities related to nature, some of them may still be undersupplied and / or have potential for improvements in the tourism experiences proposed (through labels and quality certifications)

Core product – Nature-based & Ecotourism

Product Innovation

Activities

- **Creation of signposted and secured trekking routes in the mountains like Hiking Trails in Europe**
- **Creation of cycle trails:**
 - Near selected rivers to discover natural and cultural aspects
 - In Nature Parks/Sanctuaries
- **Development of nature sport trails** for allowing mountain bikes, quads, motorbikes while containing environmental impacts. Least impacts areas may be developed as bike & Enduro parks.
- Promote conservation and exploration of **myristica swamps** using innovative techniques and general awareness

Accommodation & infrastructure

- Infrastructure enhancement of **Bondla Zoo** and **Wildlife Sanctuary**
- **Creation of low density and unique types of accommodation**
- **Developing ecological mode of transports** such as Electric bicycle and Electric quad bike
- **Interpretation centre** (edutainment) creation to understand nature
 - Turtle conservation centre ,Dolphins & marine life
 - Bats, Birds, Goa Fauna & Flora
- **Create an adventure park** with multiple activities for different age groups, while being respectful of nature and the environment (tree top adventure park, sliding, slackline, zip line)

Other initiatives

- **Develop campaigns and animation** to raise the public and local awareness about the need to protect nature
- Sponsorship to plant endemic trees

Examples of activities/ facilities

Nature parks and interpretation/discovery centres:

- Bali Bird Park (www.bali-bird-park.com)
- Turtle Conservation centre (www.georgiaseaturtlecentre.org)
- Panama Rainforest Discovery Centre (www.pipelineroad.org)
- Mountain Bike routes - 7 Stanes, United Kingdom
- Farms tours (www.circlefarmtour.com)
- Mulu Caves Malaysia – (www.mulupark.com/html/cave_activities)
- Hiking routes in Europe – (www.era-ewv-ferp.com/walking-in-europe/e-paths)
- Monte Tamaro (<http://www.montetamaro.ch>)
- Eco museum d'Alsace, France (<http://www.ecomusee-alsace.fr/>)
- Night Safari (www.nightsafari.com.sg)
- Werribee Open Zoo (<http://www.zoo.org.au/werribee>)

Accommodation

- Eco Cottage Goa (www.wilderness-go.com)
- Tented camps/ camping (<http://france.huttopia.com/en>)
- Eco lodge (www.wilderness-safaris.com)
- Six senses Resorts (www.sixsenses.com)
- CGH Earth, India (www.cghearth.com)
- Alila Resorts (Ubud) (www.alilahotels.com/ubud)

Certification

- Rainforest Alliance (www.rainforest-alliance.org)

Territorial vision

- **Low density tourism development & protected areas:**

The talukas of Sattari, Dharbandora, Sanguem and Canacona (the easternmost talukas of Goa) are covered with dense forest and are home to varied wildlife. This is true for other National Parks and Sanctuaries in the state too.

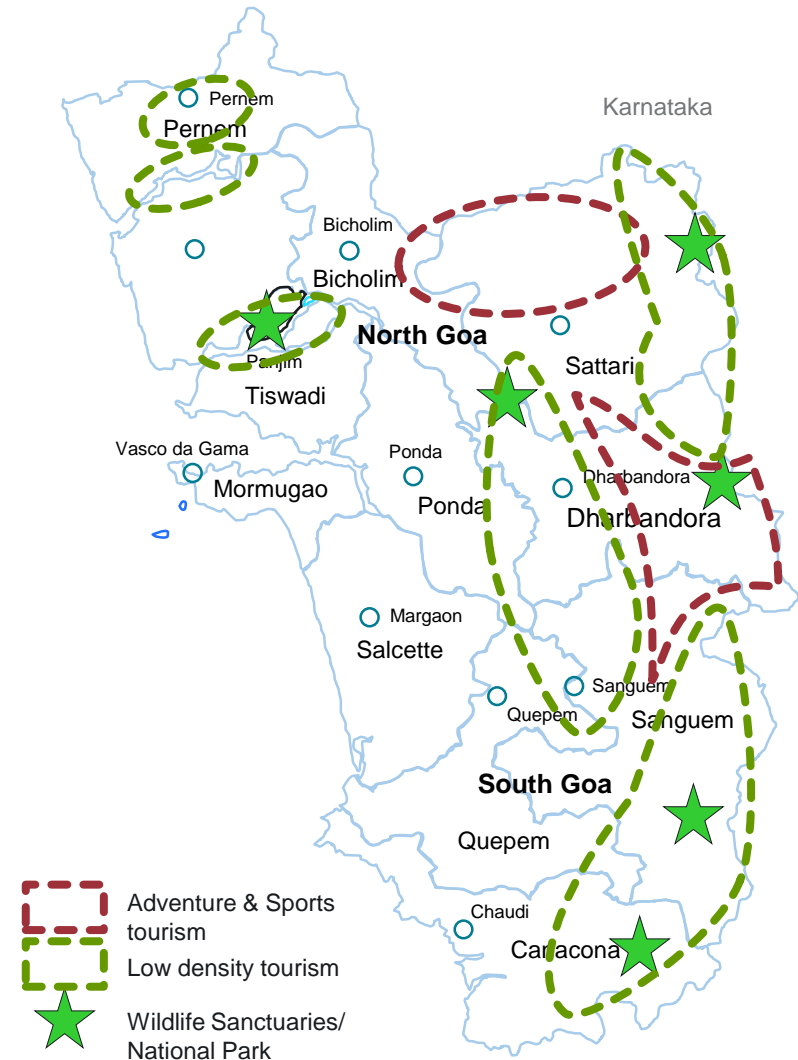
These hinterland areas should be recognized as special interest and preserved / protected from mass tourism flows and developments. In these talukas it might be possible to create attractions based around local flora / fauna, a proper botanic garden, new protected areas and special interest zones, marked trekking trails, among others. Low density tourism eco-lodges with an orientation towards environmental and social promotion would help to conserve the natural features and attractiveness of these areas.

- **Adventure & Sports tourism:**

Since these types of tourism activities and experiences might cause greater territorial impacts, the proposal is that these activities would have to be developed in areas with lower environmental value. The main goal here is to improve already-existing experiences by upgrading products, facilities and basic infrastructure, staff training and introducing security regulations.

- **High end nature Tourism**

In the vicinity of the Mopa airport, and along the River Chapora waterways can be developed to promote nature based tourism through promenades, jetties and river cruises. High end agri tourism can also be promoted in the area



Key takeaways/ conclusions

- Goa has natural assets that are underdeveloped today and that would make it possible to enhance the experience of the tourist in the destination by combining the Coast and the Hinterland.
- Sustainable and Responsible Tourism are today very important factors in the choice of a destination by visitors. The beauty and sustainable development of activities and assets in the nature are a differentiator. Goa has attractive scenic areas that could function if well planned and managed.
- By upgrading the necessary infrastructures and developing the territory, Goa will create a new and attractive sustainable tourism product for locals, visitors and tourists.
- Goa has potential and opportunities that are today underexploited to optimise Ecotourism products, ranging from Adventure & Sports tourism (sightseeing, walking, trekking and cycling) to Wildlife Sanctuary parks (birds, animals, marine life).
- Goa, as a Destination, must protect and take advantage of its natural resources and even though many activities and facilities exist, they need to be improved.
 - Attractions based around the flora, a proper botanical garden, new protected areas, guided tours, marked trekking trails
 - Improve development and management of protected areas (forest , marine, sanctuary, conservation centres)
 - Improve signage to reach to the existing nature sites (waterfalls, lake, dam, animal sanctuaries) and develop information panels



Core product – Leisure & Entertainment

Product Context

- Goa is well known for its leisure and entertainment concept, mainly for beach parties and casinos. The perception by locals of this kind of tourism is not always good as it attracts many negative influences such as drugs, prostitution and thieves
- A more controlled and improved offer should be proposed in order to minimise the impact of this kind of tourism on the image of Goa and its population.
- Casinos (Gaming) is an important product in Goa and limited in India, but it is addressed to specific domestic and international market segments

Product definition

- Leisure & entertainment includes man-made activities such as casinos, shopping and evening entertainment
- Leisure and entertainment products can be associated with various activities and facilities including sports, festivals, edutainment, streetmosphere
- Goa could provide a wide variety of different leisure facilities and services, ranging from paid to free-access activities to cater for all target segments, visitors and residents alike
- Activities and services proposed could be active or passive, day/ night, indoor/ outdoor, hard/ soft, permanent/ temporary to satisfy the needs of all target segments

Product subcategories

Soft

Activities

- Music
- Dance
- Religious festival
- Streetmosphere
- Exhibition

Hard

Activities

- Casino
- Waterparks
- Adventure park
- Golf
- Marina
- Night clubs/ Discotheques
- Lounge bars
- Retail/ Shopping



Core product – Leisure & Entertainment

Product Value Proposition

- In recent years, Goa has emerged as a strong Casino (gaming/ gambling) tourism destination, attracting tourists mainly from the Middle East
- Goa is known as a leisure & entertainment destination and should keep proposing services, activities and facilities linked with this product. At the same time it should improve what is existing by also creating new concepts to give tourists a better experience

Product Improvement

Leisure & Entertainment facilities with international standards targeted essentially to the domestic market, such as:

- **Marinas:** should be integrated in the capital with activities and facilities around such as small fish market, restaurants, shops, promenade. It could be located in the capital and/or in other talukas where it is possible to implement
- **Casinos:** the floating casino concept is interesting and should be improved with a better access area that should provide complementary products and facilities
- Develop more **Golf courses** but associated with international hotels brands

Product Innovation

- Waterpark, adventure parks and amusement parks
- Large and attractive modern leisure places for locals, visitors and tourists, such as picturesque promenades with leisure facilities on the sea and river waterfront
- Shopping areas
- Food courts
- Streetmosphere in Old Goa and in waterfront areas

Examples of activities/ facilities

Amusement Parks

- Tree top Adventure park, Australia (www.treetopadventurepark.com.au)
- Wild Wadi, Dubai, (www.jumeirah.com/en/.../wild-wadi-waterpark)

Waterfronts

- Victoria & Alfred Waterfront, South Africa (www.waterfront.co.za)
- Caudan Waterfront, Mauritius (www.caudan.com)

Golf resort

- Fairmont Hotels & Resorts (www.fairmont.com/golf)
- Four Seasons Hotels & Resorts (<http://www.fourseasons.com>) Shopping Streets
- Resort and shopping village concept in Farasan Islands
- Fish market with food & beverage concept in Jazan

Goa must adopt a new leisure & entertainment tourism concept capable of mixing casino gaming with other forms of leisure and entertainment

Core product – Leisure & Entertainment

Product seasonality ■ High ■ Medium ■ Low

General destination seasonality	Product Future potential	
January	January	Carnival & Shigmotsav
February	February	
March	March	
April	April	
May	May	
June	June	Monsoon season
July	July	
August	August	
September	September	
October	October	
November	November	
December	December	

Facilities / Services	Accommodation
<ul style="list-style-type: none"> • Interpretation centres • Museums • Event venues • Theatres • Edutainment • Oceanarium • Riverside promenade with cultural activities and Goan cuisine options • Jetties • Related public services & basic infrastructure (transportation) 	<ul style="list-style-type: none"> • Boutique accommodation in heritage buildings: <ul style="list-style-type: none"> • Hotel model • Heritage Homes model • Accommodation options combined with adventure/ theme parks • Themed accommodation options, e.g. Goan heritage, Nature based

Demographics
Lifestyle

Segments

Seniors	Family	Solo	Couples	Groups	Discovery	Feel alive	Trendsetters	Wellbeing	Cultural	Nature lovers	MICE
✓	✓	✓	✓	✓		✓	✓				✓

Territorial vision

Facilities on the coast:

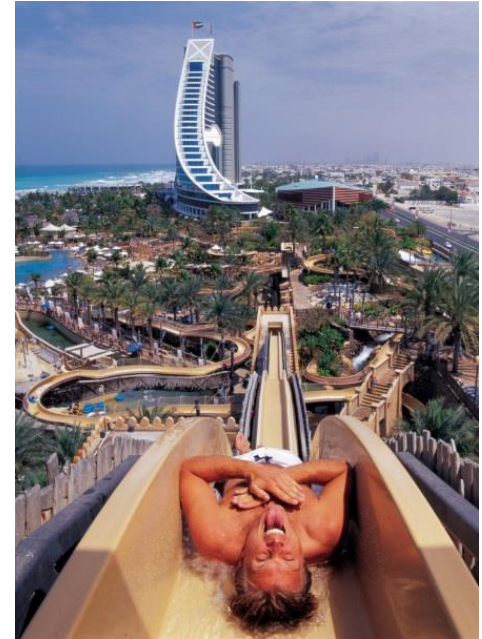
- The talukas of Bardez, Tiswadi and Mormugao, which already concentrate most of the offer, would be the main focus of the Leisure & Entertainment product strategy for Goa.
- Besides upgrading the existing offer, new facilities and infrastructure need to be developed.
- Beachside shacks are a key differentiation for Goa.
- Leisure and entertainment facilities such as marinas, casinos (and floating casinos), golf courses, promenades, shopping areas, streetmosphere, among others, must necessarily be located near the coast and river waterfronts and enjoy easy access / connectivity. These facilities should be large and attractive modern leisure places for locals, visitors and tourists.
- Marinas should be located near the capital and integrated with other activities / facilities (fish markets, F&B, retail, promenades). A large marina could be located in Panjim or other central talukas where it is possible to implement.
- Golf courses could be associated with international hotels brands (where possible) - an assessment on the environmental impact should be carried out.

Facilities in the hinterland:

- In addition, some leisure and entertainment facilities might be located in the hinterland. These facilities can be linked to other type of products such as nature-based and ecotourism activities. They also might be located next to accommodation establishments.



Core product – Leisure & Entertainment



Culinary Tourism

- Culinary is a tourism trend gaining popularity with inbound tourists seeking out local food preparations, products and flavours. They are keen on discovering local markets, preparation types and spices.
- It is one of the most attractive ways of discovering and sharing the local culture.

Product Context

- The cuisine of Goa is influenced by its Indian origins, four hundred years of Portuguese colonialism and other international influences. It is also famous for its seafood and the use of coconut, tamarind, chili and pepper as important spices in food preparations.
- Portuguese cuisine, either in its traditional or modern reinterpreted form, is definitely a theme to be further developed.
- Feni and wine are a part of the Goa tradition, especially Feni, which has a GI Certification. Goan Wine, with its local wine cellars can be an interesting 'niche' product for the international market.
- Traditional agricultural products need to be enhanced to add value to tourism in Goa through the development of events such as the Goa Grape Festival, cooking sessions in restaurants, and creation of new events around food and beverages.

Product offerings

Gastronomy	
Activities	<ul style="list-style-type: none">• Breakfast, lunch and dinner• Cooking sessions
Wine-tourism	
Activities	<ul style="list-style-type: none">• Routes / circuits / Visits• Food Festivals



Key Gaps

- Limited marketing and promotion efforts for culinary tourism, especially representing various cultural influences on local cuisine.
- Absence of varied festivals selling local foods and produce, and awareness of different cuisines available across the state.

Complementary product – Culinary

Product Value Proposition

- Culinary tourism is complementary to cultural tourism as cuisine is a manifestation of culture. It is also linked to agritourism/ community tourism, as the seeds of cuisine can be found in agriculture.
- Goa is well known for the production of feni and wine. Having its own wine festival, the wine and cuisine experience can also become a unique selling point for the destination

Key tourists segments for culinary tourism

Seniors	Family	Solo	Couples	Groups	Discovery	Feel alive	Trend-setters	Wellbeing	Cultural	Nature lovers	MICE
✓	✓	✓	✓	✓	✓		✓		✓		

Demographics  Lifestyle 

Product Improvement

Products and tourism assets developed further to promote Culinary tourism around:

- Cashew/ spices or coconuts plantations: routes / circuits / visits where tourists can learn about them
- Spice farms in Goa can offer a unique culinary experience, which can be further promoted and upgraded by creating the 'Table d'hôtes' concept (eating with locals)
- Creation of labels and certification for food outlets/restaurants all over Goa may serve as references for tourists.

Product Innovation

- Goa has a GI tag for Feni. Towards utilising the same, preservation of its its production processes is key. Also the marketing and distribution needs to be managed efficiently. Creation of Feni exploration tours.
- Creation of wine routes/circuits to taste and discover the production of wine in Goa can be developed.
- Development of farmer's market to encourage display and trading of local produce

Examples of activities/ facilities

Cooking sessions

- Cooking class during holidays (www.golearnto.com/cooking-holidays-and-wine-courses/cooking-courses-and-holidays)

Wine Routes

- Alsace Wine Route (www.alsace-route-des-vins.com)

'Tâble d'hôtes' Concept

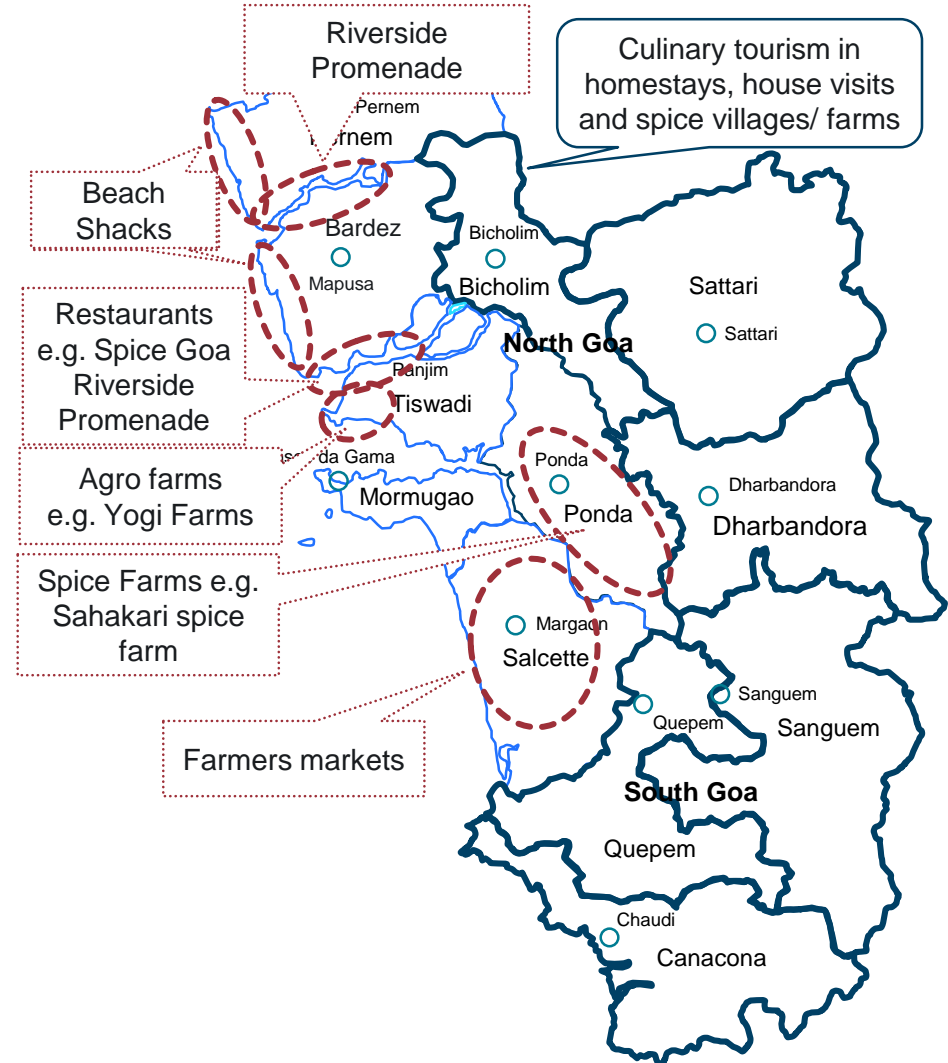
- Welcome to the farm – French website mixing accommodation with eating with locals in their home - 'Bienvenue à la Ferme' (<http://www.bienvenue-a-la-ferme.com>)

Territorial vision

Culinary tourism has a strong relationship with the territory and communities as it is based on creating cuisine from local produce.

The attractiveness of Goa's local cuisine is based on its mix of authentic / local and international flavours. However, its related tourism potential has not been sufficiently promoted and explored. Some key proposals towards the same include:

- Most of the spice plantations and farms are concentrated in the talukas of Bicholim, Ponda, Dharbandora, Salcette and Quepem. Activities / routes and circuits should be developed around cashew / spices, coconut and pepper plantations to develop the product.
- Goan port-style wine production in Salcette taluka should be included in the wine routes / circuits as well as the production of Feni on the territory.
- Culinary tourism could also involve the creation of farmer markets, events and festivals (some food festivals are already well positioned in Goa) around local products.
- Additionally, special attention must be paid to the promotion of local cuisine in restaurants and accommodation establishments in Goa, including development of speciality restaurants.



Complementary product – Culinary

Key Takeaways

- Culinary tourism enables the pursuit of unique and memorable dining and drinking experiences in Goa.
- The cuisine of Goa is a delicious reflection of its history and heritage
- It is influenced by its Hindu origins, several years of Portuguese Empire and modern techniques.
- Various spice farms offering culinary experiences can help in discovering the local culture
- Marketing and distribution of local produce like Feni and Wine needs scaling up
- Development of cashew trails, wine circuits and cooking lessons to promote culinary tastes of goa
- Tourism authorities should encourage hoteliers to enhance traditional products from the state agriculture. It needs to get added to the local cuisine



Complementary product – Health & Wellness

Health & Wellness Tourism

- Health tourism involves clients with medical conditions who would travel to experience healing therapies. A person who seeks a wellness travel experience, is generally healthy to start with, and seeks various therapies to maintain his or her well being.
- Health and wellness tourism is chosen by health-conscious consumers seeking to enhance their well being through their travel experiences. This type of consumer seeks to - look and feel better, manage weight, slow the effects of aging, relieve pain or discomfort and manage stress to improve health

Product Context

- Health & Wellness tourism products in Goa can be divided into 2 products:
 - Health clinics for visitors
 - Spa & Ayurveda centres in hotels/resorts or independent institutes
- Goa has the potential to focus on wellbeing through its lifestyle and traditions. India has traditionally welcomed travellers thanks to its warm climate, fresh air and relaxing seas combined with rich traditions including Ayurveda – for decades.
- Resorts and hotels are joining the health spa development, although only some resorts are offering the gamut of services currently offered by destination spas



Key Gaps

- Absence of international standard wellness resorts for attracting high end tourists
- Unavailability of high quality care facilities and limited medical infrastructure essential to attracting health conscious tourists

Product offerings

Spa & Wellness

Activities

- Spa treatments packages
- Ayurveda treatments
- Relaxation activities (i.e. Yoga)

Medical

Activities

- Soft intervention medical treatments and programmes
- Soft surgery treatments
- Relaxation and recovery activities

Complementary product – Health & Wellness

Product Value Proposition

- India has an age old tradition in wellbeing provision through its culture, philosophy, Yoga and Ayurveda. Goa is already offering a spa and wellness offer through its resort and hotels, which needs to be further developed.
- India is also a pioneer in Health/Medical tourism and has very good clinics for medical treatment. Goa should provide accommodation and facilities to these segments for the post-clinic stay in the quiet and relaxed environment that is unique to Goa's lifestyle.

Key tourists segments for health/wellness tourism

Seniors	Family	Solo	Couples	Groups	Discovery	Feel alive	Trend-setters	Wellbeing	Cultural	Nature lovers	MICE
✓	✓	✓	✓	✓		✓	✓	✓		✓	

Demographics Lifestyle

Product Improvement

- Goa has the potential to develop luxury wellness centres to address traveller needs, especially in hotels and resorts.
- World-renowned spa brands and a variety of ecological and nature-based products with exotic and Goan flavours should be included in the offer.
- Hotel / Resort spas adding amenities to the resort offer can also be developed

Product Innovation

- Health Tourism can also be developed through the creation of clinics for soft interventions and recovery in luxury resorts.
- Specialised medical centres targeting those travellers seeking curative treatments should be developed
- Relaxation and recovery centres aiming at travellers having undergone medical treatments and diseases could be developed.
- Yoga training centres can be developed in key locations

Examples of activities/ facilities

- Resort & Spa
- Six Senses Resorts & Spa Thailand (www.sixsenses.com)
 - Banyan tree Resorts & Spa, Singapore (banyantreespa.com)
- Wellness Centers
- Devaaya – Ayurveda & Nature Cure Centre (www.devaaya.com/the-centre.php)
 - Sha Wellness Resort & Clinic, Spain (www.shawellnessclinic.com)
- Yoga training centres
- Sanda Retreats (<http://www.sandaretreats.com/Yoga-Vimoksha-Goa/index.php>)

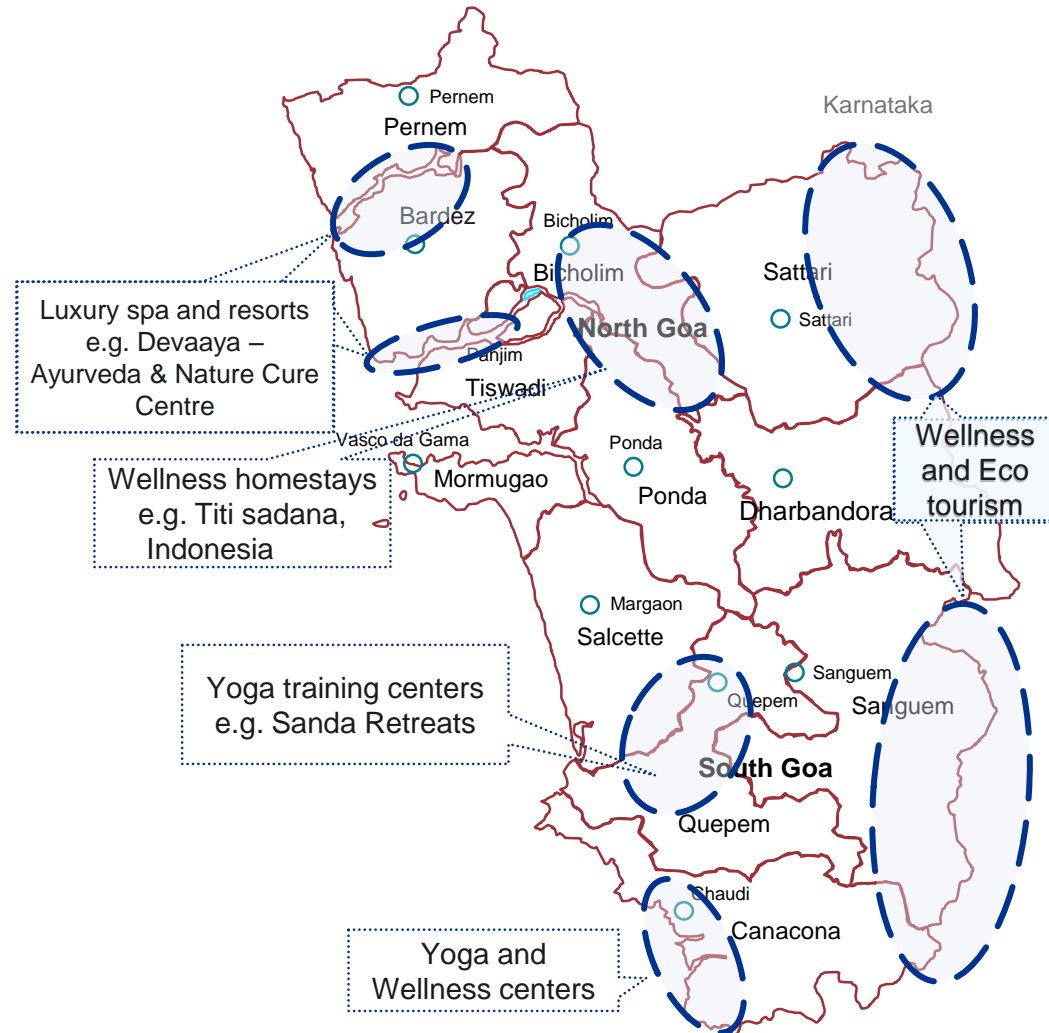
Territorial vision

Facilities along the coast: Goa can leverage its seaside location, climate and relaxed environment by developing several health & wellness related facilities and infrastructure.

- The more well-known spa resorts and spas located in luxury hotels are concentrated along the coast and along rivers/ fields. The aim here is to upgrade products that have developed on a low-profile basis alongwith adding new facilities.
- New centres (stand-alone spas, resort spas and/ or clinics) should necessarily target those high-end customers who are by choice coming to a place for good quality health & wellness care and services supported through strong infrastructure and facilities.
- Training centres can also be developed in these areas

Facilities in the hinterland: The easternmost talukas of Goa (Sattari, Dharbandora, Sanquem and Canacona) offer a chance to develop health & wellness facilities in highy secluded environment / atmosphere.

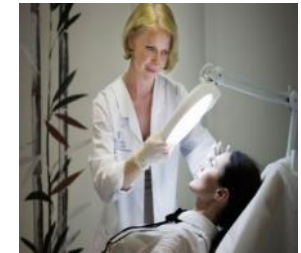
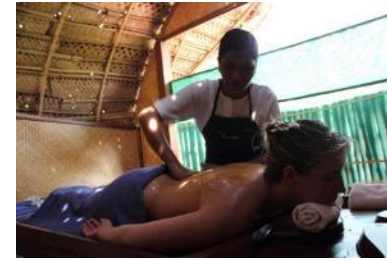
- World-renowned spa brands and a variety of ecological and nature-based products with exotic and Goan flavours should be included in the offer.
- Tourists and visitors may enjoy walks, see rivers, wetlands, great views, birds, waterfalls, mountains and more . Training centres for staff may be developed .



Complementary product – Health & Wellness

Key Takeaways

- Goa has the potential to develop into a wellness destination with its unique advantage of medical infrastructure in a relaxed natural environment e.g. the eastern talukas (Sattari, Dharbandora, Canacona and Sanguem)
- Development of luxury spa resorts can further increase the propensity of attracting high end tourists to Goa
- Goa also offers scope for the development of Ayurveda and nature cure centers which can impart preventive care to wellness conscious tourists.
- Adequate accommodation/ homestay facilities along with the development of several relaxation and recovery activities would be required for Goa to gain a share of the increasing health conscious consumer market.



Complementary product – MICE and Weddings

MICE and Wedding Tourism

- Meetings, incentives, conferences, and exhibitions (MICE) is a type of tourism in which large groups, usually planned well in advance, are brought together for a particular purpose. Large conventions and expos are normally bid on by specialized “convention” bureaus located in particular countries and cities .
- MICE tourism is known for its flawless planning and demanding clientele.
- Incentive tourism is usually undertaken as a type of employee reward by a company or institution for targets met or exceeded, or a job well done.
- A destination wedding is an opportunity for couples to celebrate their marriage at an exotic destination of their choice away from home.

Product Context

- Meetings, incentives, corporate outbound activities and conferences are efficient means to attract tourists out of the high seasons and weekends. This helps to increase hotel occupancy during the low season.
- MICE tourism is currently developed to a limited extent in Goa in the absence of a dedicated Convention and Exhibition centre in the capital.
- Destination weddings can become a key source market for Goa tourism.
- Today, hotels are recognising this market to adapt and create facilities to host big events with capacities for managing large groups.



Key Gaps

- Absence of dedicated convention and exhibition centres/ expo halls across the state (including Panaji)
- Unavailability of accommodation near the facility, transport facilities and good waste management practices essential to a pleasant stay

Product subcategories

Conventions / Events

Activities

- Conventions
- Conferences
- Meetings
- Events and Weddings

Incentives / Team building

Activities

- Incentives
- Team building
- Entertainment (Gaming, Shows, Beach Party, Festivals, Water Sports and Excursions)

Complementary product – MICE and Wedding

Product Value Proposition

- Meetings, Incentives, Conventions, Exhibitions and Weddings are a lucrative complementary tourism product which should be developed in Goa especially to fill the low/ non peak season.
- Goa has multiple assets to create a great MICE destination. These include not only cultural tours, entertainment, shows, gaming and festivals but also adventure and fun activities in nature for Incentives.

Key tourists segments for MICE tourism

Seniors	Family	Solo	Couples	Groups	Discovery	Feel alive	Trend-setters	Wellbeing	Cultural	Nature lovers	MICE
✓	✓	✓		✓		✓	✓				✓

Demographics  Lifestyle 

Product Improvement

- The staff should be trained in event organization and management.
- Develop specialised products and agencies for Incentives and corporate outbound activities like leadership development and team building.
- Activities related to skills, local culture, sports, adventure tourism, nature, food and wine could be also developed to offer an attractive incentives product.
- Enhance facilities and agencies such as wedding planners to ease the conduct of destination weddings.

Product Innovation

- MICE Facilities:
- Create a World class convention centre in the vicinity of Panaji/ Margao
 - Hotel facilities must adapt or create to MICE products towards ensuring availability of adequate sleeping rooms and conference space at hotels
 - Creation of a Goa Convention Bureau linked with the Goa Tourism Board to market Goa as a MICE destination
- Wedding destination: Better policies and promotions for developing the destination wedding market in Goa

Examples of activities/ facilities

- Convention/ Meetings
- Barcelona Convention Bureau (<http://www.barcelonaconventionbureau.com/es/>)
 - Paris Convention and Visitors Bureau (<http://en.convention.parisinfo.com/>)
- Incentives/ Team Building
- Bluehat group (<http://www.bluehatgroup.co.uk/>)
 - Team bonding (<https://www.teambonding.com/>)

Complementary product – MICE and Wedding

Territorial vision

Conventions / Events:

The building of a dedicated Convention and Exhibition Centre in the capital is necessary to promote Goa for conventions, events and exhibitions at a national and international level. Placing this facility in Panaji's vicinity would help the city to increase and attract investment and the improvement of infrastructures and communication systems.

Also, existing hotel facilities must adapt to MICE products (addition of new units should be also contemplated) so that enough rooms and conference space is available. This would especially be required in the talukas adjacent to Panaji (Tiswadi, Bardez and Mormugao).

Panaji should also be home to the proposed “Goa Convention Bureau” which will be linked with the Goa Tourism Board to promote events and market Goa as a MICE destination.

Incentives / Team Building

Due to its nature, incentive tourism is conducted mainly for entertainment – it is usually undertaken as a type of employee reward by a Company / institution for targets met or exceeded, or a job well done. The recommendation is to link this tourism product with activities related to skills, local culture, sports, adventure, food & wine. The talukas of Sattari, Sanguem and Dharbandora could be configured in order to concentrate on an interesting tourism offer.

Destination Weddings

Goa by virtue of its lush green forests and fields, as well as its picturesque beaches is a key venue for destination weddings. Dissemination of information on key modalities and procedures including public performance license, sound restrictions, Visa formalities and wedding registration would facilitate development of this product



Complementary product – MICE and Wedding

Key Takeaways

- There has been a steady increase in MICE tourism and business travel to Goa at approx. 15% which shall grow further in future.
- Increase in wedding business, improving purchasing power of rising middle class and frequent corporate offsite is leading to increase in tourists inflow during non-peak season in Goa
- There is a need for a large convention center in the city to attract MICE events of large scale
- Increasing need for trained manpower, better road, air and accommodation infrastructure, waste management is required to offer a comforting experience to business travelers.
- Goa has the potential to become a popular wedding destination with its range of tourism assets
- Development of complementary tourism products like wellness, adventure tourism and others to improve on the average length of stay of tourists during MICE visits.



Complementary product – Community Tourism

Rural / Community Tourism

- Rural tourism is a specific product aimed at enhancing the local culture, lifestyle and population of the destination. This form of tourism benefits both locals and tourists through cultural interaction and exchange with visitors.
- A key motivation for their journey is integration with the local community through visiting villages and understanding day to day life. These tourists are keen on sharing meals with the locals and understanding their culture better.
- Community tourism is not recreating traditional ceremonies or folkloric events but offering a slice of the real Goan life to tourists eager to discover their culture.

Product Context

- Rural/ Community tourism is currently present across Goa in the form of spice farms (cultivation of spices, cashew nuts, coconuts), primarily across the central section of the state and in the form of homestays in pockets across the state, e.g. Salcette, Salgini and Verlem.
- It is a complementary tourism activity allowing tourists to better understand Goa's traditions and lifestyle.
- Current worldwide trends suggest that tourists and visitors tour the world in search of a truly authentic touristic experience, with an aim to be considered as a "local" and not as a tourist.

Key Gaps

- There are more than 300 small villages in Goa that give character to the destination. However it is not as well positioned as, for example, Kerala in terms of destination attractiveness
- Efforts should be taken for bettering the value proposition and promotion of the product
- Best practices need to be established, with inputs on minimum service expectations

Product subcategories

Rural/ Community Tourism

Activities

- Routes / Circuits
- Learning-by-doing activities (Edutainment)
- Homestays
- Plantation tours
- Day outings including picnics



Complementary product – Community Tourism

Product Value Proposition

- Provide an “authentic Goan” experience to visitors. Facilitate visitors keen on understanding its people, lifestyle and traditions not only through visiting villages and farms, but also by sleeping in rural accommodation.
- Rural/ Community Tourism is a sustainable practice and allows locals to develop specific products, facilities and activities for visitors. These benefits go directly to the population.

Key tourists segments for community tourism

Demographics		Lifestyle		Values		Attitudes		Interests		Behaviors	
Seniors	Family	Solo	Couples	Groups	Discovery	Feel alive	Trend-setters	Wellbeing	Cultural	Nature lovers	MICE
✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	

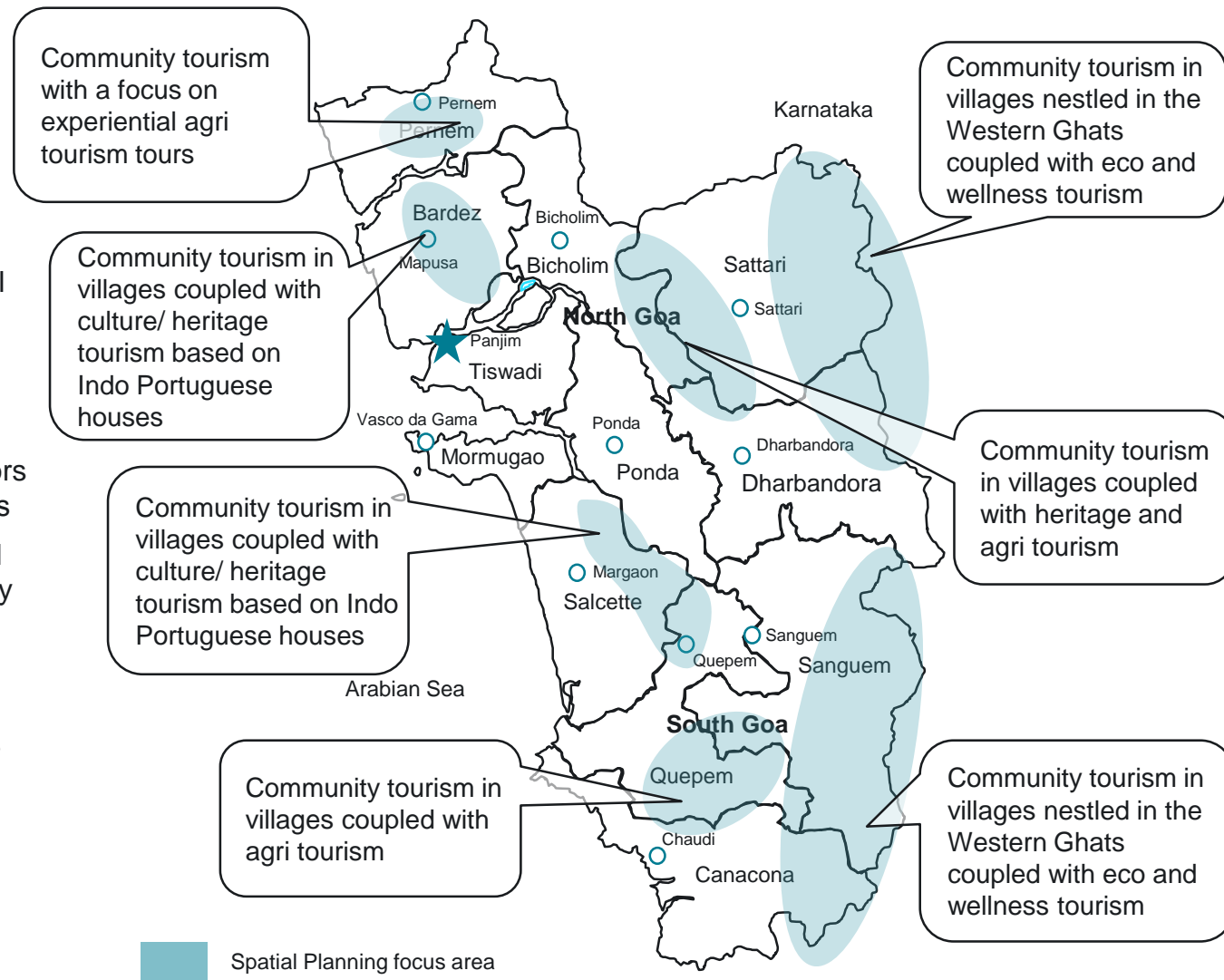
Product Improvement	Product Innovation	Examples of activities/ facilities
<ul style="list-style-type: none"> Rural accommodation with quality products should be developed in farms and/or private houses towards providing experiential tourism It can be supplemented with the development of interpretation centres museums, training of tour guides to help visitors understand the area It can also be based on traditional and local products such as rubber, spices, coconuts, cashew nuts, feni, wine and fishing or a wine and dine/ Bed and breakfast setup with locals 	<ul style="list-style-type: none"> Goa should develop a consistent community tourism policy to involve the population, benefit the community and the tourism sector Community discovery tours could be developed for small tourists groups towards discovering the day-to-day life of the populace and environment. Hotels should be encouraged to contribute to the community' life by employing locals, sourcing local products and providing training. A lifestyle interpretation centre/ eco museum could also be developed. 	<p>Integrated farms/ interpretation centres:</p> <ul style="list-style-type: none"> Circle Farm Tour- Canada (www.circlefarmtour.com) Chalalán Ecolodge, Bolivia (www.chalalan.com) <p>Communities promoting their work through tourism:</p> <ul style="list-style-type: none"> Community Tourism Dominicana, Dominican Republic (communitytourism.dm) Umnini Craft Village, South Africa (www.southafrica.net/sat/content/en/za/full-article?oid=413137&sn=Detail)

Complementary product – Community Tourism

Territorial vision

Discovery tours:

- Rural / Community tourism has a strong relationship with the territory
- It is based on the production of traditional and local products
- It provides tourists and visitors the opportunity to discover / experience the everyday way of life of the populace and environment. Essentially it provides visitors a window into Goa's culture and traditions
- In Goa, most of the spice plantations and farms are located in the hinterland, mainly across the Talukas of Bicholim, Ponda, Dharbandora, Salcette and Quepem
- There are also a number of picturesque villages and historic towns spread across these talukas



Core product – Community Tourism

Key takeaways

- Goa has a number of picturesque villages and historic towns spread across the width and breadth of its talukas
- Community tourism essentially provides visitors a window into Goa's culture and traditions. It provides tourists and visitors the opportunity to discover/ experience the everyday way of life of residents at the destination.
- With the Goan flavour of hospitality that the state is famous for worldwide, community tourism is expected to cater to the international tourist demand for experiential travel in a big way.
- Community tourism is currently at the Introduction stage on the tourism life cycle. Homestays and spice villages are key products currently established in this segment
- Given the potential for direct contribution to the society at large with a minimum adverse impact, this form of tourism sees high potential for growth in the state.
- This is proposed in an organised manner with scalability over the years through word of mouth techniques supported by very tangible results.



Complementary product – Nautical Tourism

Nautical Tourism

- Nautical tourism in the Goan context includes 2 segments:
- **Marine/ Sea Cruise** (accommodation & facilities) – A pleasure voyage aboard a passenger ship where the voyage itself and the ship's amenities are a part of the experience, along with different land halts on the journey. This is a fine option for tourists to sample destinations that they may wish to visit again on a land-based vacation.
 - **River Cruise** (primarily facilities, could include accommodation) – This form of tourism allows visitors to discover the destination in relaxed manner on a vessel taking in the lush greens, calm waters and varied fauna.

Product Context

- Goa has 105 km of beautiful coastline and more than 300 km of navigable waterways. Being a key destination for domestic as well international tourists, significant potential for development of nautical tourism exists. However, significant investment in infrastructure is required.
- Sea cruises make stops in Goa at present. However, day activities proposed should be improved in order to induce more spending from the transit passengers.
- River cruises are already popular in Goa. However, stops and visits along the route should be improved to give a better experience to the visitors. This allows locals to benefit from tourism in the villages when the boats stop to visit specific sites.

Key Gaps

- Limited terminal infrastructure to receive passengers. Major time delays in port exit time.
- Lack of avenues in the near vicinity of the port for visitor excursions.
- Limited jetties and marinas for smaller river/ sea vessels



Product subcategories

Sea Cruises

Activities

- Boat-cruising
- Sea front (water front)
- Routes / circuits
- Day visits

River Cruises

Activities

- Riverboat cruises
- Routes / circuits

Complementary product – Nautical Tourism

Product Value Proposition

- Offering visitors another perspective on Goa by allowing them to discover and experience the destination in close proximity to nature and the Goan populace via Goa's many rivers and lakes.
- Since Goa is a port for sea cruises, it has the opportunity to receive additional visitors who will discover the destination and could come back later for a longer stay.

Key tourists segments for nautical tourism

Seniors	Family	Solo	Couples	Groups	Discovery	Feel alive	Trend-setters	Wellbeing	Cultural	Nature lovers	MICE
✓	✓	✓	✓	✓						✓	✓
Demographics											

Product Improvement

Several shore products should be developed in order to improve a cruise visitors experience:

- Improve transportation options from the main port of arrival
- Improve the current shopping experience

Riverboat cruises should:

- Showcase landscapes and natural environments of the Goan hinterland.
- Various modalities including the creation of halting points along the river with attractions, activities and access for the discovery of Goa's hinterland should be considered.
- Have a high emphasis on safety and standards

Product Innovation

- Create beach destinations with Beach Club facilities close to the cruise port in order to provide options to visitors to spend a day on the beach with food, drinks, toilets, shops
- Develop a lively waterfront with live entertainment, music, restaurants and retail. A waterfront could be created in Panaji along the River Mandovi to give an opportunity to visitors to discover the capital city of Goa and have an insight into the destination
- A waterfront along River Chapora could also be considered for development given that it can be accessed from the port via sea.
- Develop jetties along the major navigable rivers for vessel halts
- Promote yachting and sailing

Examples of activities/ facilities

Waterfront facilities for Cruise passengers and visitors:

- Victoria & Alfred Waterfront, Cape Town - South Africa (www.waterfront.co.za)
- Pier 39, San Francisco - United States (www.pier39.com)

River Cruise

- Canal du midi – France (www.canalous-canalumidi.com/fr)

Territorial vision

Sea cruises: MPT is currently developing a state-of-the-art cruise terminal (expected to be ready by December 2016) which would be a boost to improve the cruise infrastructure in the state.

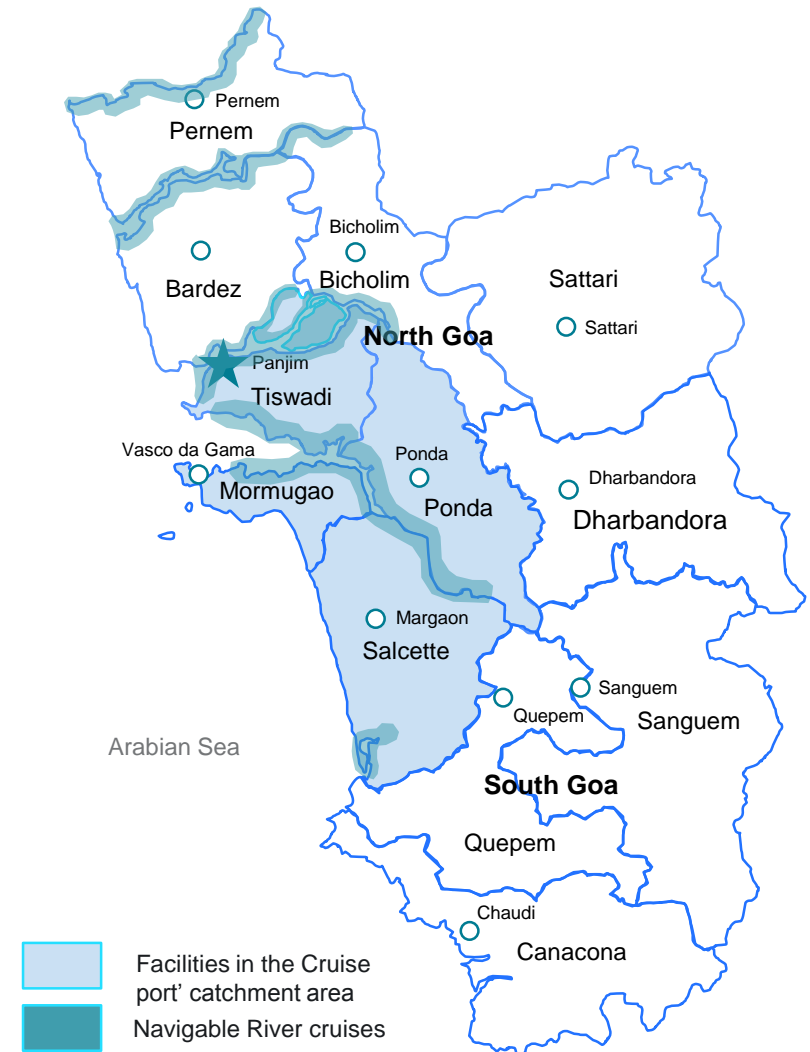
A large number of tourists disembark and go sight-seeing or shopping from this point.

In order to improve this experience, Goa needs a lively waterfront with entertainment, music, F&B and retail. It could be created in Panaji – to help visitors get a glimpse into Goa and have a first insight into the destination.

Beach club facilities close to the cruise port could be another option to spend the day.

Cruise visitors should also have the option to embark on two to three hour tours through the countryside. Excursions to the Dudhsagar waterfalls, visit a spice plantation or wineries/distilleries are key options to be considered.

River cruises: Dinner cruises and backwater cruises are currently in operation through some of the main navigable rivers in Goa. The experience could be upgraded by creating an extensive network of ports/ marinas, improving environmental management and linking it with some of the proposed Culinary tourism circuits.



Core product – Nautical Tourism

Key takeaways

- Nautical Tourism is a key trend gaining popularity in the tourism sector. It is developing rapidly both in terms of scope, as well as economic contribution.
- It covers a wide variety of activities of marine tourism such as sailing, yachting and cruising and diving, as well as harbour-side activities and riverway tours.
- Given Goa's popularity as a tourism destination worldwide, it should be promoted in an effective manner to attract quality cruise travellers. This should be supported by the on the ground development of core and support infrastructure and facilities including excursions.
- Tourism along our river ways would provide visitors a unique experience in Goa, especially giving tourists a chance to see 'freshies' (freshwater crocodiles) that have adapted themselves to the saline waters of the Cumbarjua Canal and experience the Goan hinterland



Complementary product – Short breaks

Short Breaks

- Defined as short trips devoted to pleasure, rest, or relaxation. Short Break destinations target special segments and offers special products and experiences. Short breaks can be independent or packaged.
- Short breaks include long weekends and can vary from 3 – 5 days. Leading international destinations have developed the short break products as a key way to leverage trends of shorter and more frequent breaks.

Product Context

- Short breaks are underestimated tourism products in Goa. Today, the focus is on beach getaways and parties. Nevertheless, these products should be taken into account in order to reduce the seasonality of the destination.
- Regional tourism and short breaks will be essentially aimed at tourists from India and the Middle East (mainly from the UAE and Qatar) eager to spend 3 to 5 days near their homes but disconnected from their environment.
- The introduction of direct connections with important destinations in the Middle East as well as the ‘visa on arrival’ policy will help in promotion of short breaks.
- Indian tourists are a potential target market during the low season as they are acquainted with the monsoons and do not want to renounce the possibility of travelling because of the rains.

Product subcategories

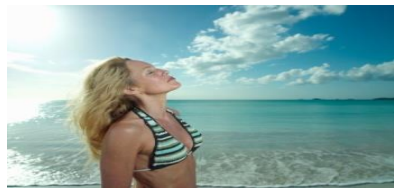
Activities

- Culture
- Nature
- Casino
- Waterparks
- Adventure park
- Golf
- Festivals
- Marina
- Night clubs
- Lounge bars
- Retail/ Shopping
- Beaches

Key tourists segments for short break tourism

Seniors	Family	Solo	Couples	Groups	Discovery	Feel alive	Trend-setters	Wellbeing	Cultural	Nature lovers	MICE
✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	

Demographics ☐ Lifestyle ☒



Complementary product – Short Breaks

Product Development

- Cultural and nature-based packages could be developed to target expats and local families from the Middle East.
- Other areas for promotion of this product include festivals, golf, gaming, nightlife and shopping.
- To develop this product, the destination should offer short breaks packages including flights and accommodation as well as thematic activities: relaxation, cultural, gastronomy and sports.

Key takeaways

- Short trips , breaks and demand for relaxation have increased in competitiveness. The ever-faster pace of life will carry on in the coming years, and consumers will find it detrimental to their own free time.
- As a result, short trips are expected to gain momentum, since travel and business tourism will take advantage of them, offering a wide range of options for consumers taking a break from their busy lives.
- The sector providers need to continue to offer innovative "short break" packages for shorter stays. These will encourage strong demand for 3-4 day holidays from travelers who have scarce free time.

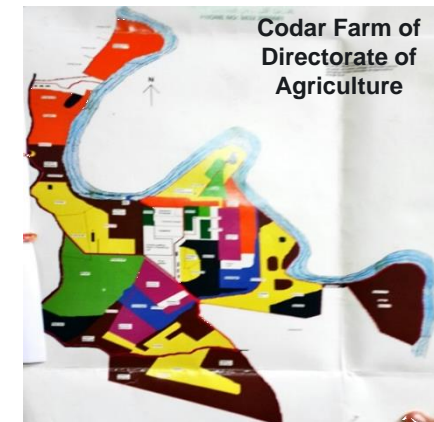
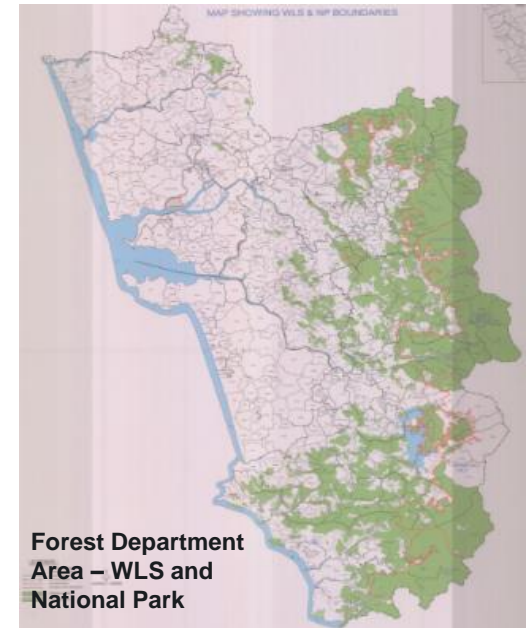


Land Availability study

- The Department of Tourism, Forest Department and Directorate of Agriculture have lands over the state which could be utilised for the purpose of tourism.
- Various tourism products can be developed in these areas based on the tourism types identified in earlier slides.
- The area statistics as obtained from these Departments have been specified below. These have been considered for the spatial planning exercise.

Total land available	Area (hectares)*	Land parcel inclusions
Department of Agriculture	240.2	Govt. owned farms
Department of Tourism	3.08	GTDC + DoT land areas
Forest Department	1,224.4	All Govt. owned land (including National Parks and Sanctuaries)
Total	1,467.7	

*Values are approximate, as provided by the respective Departments



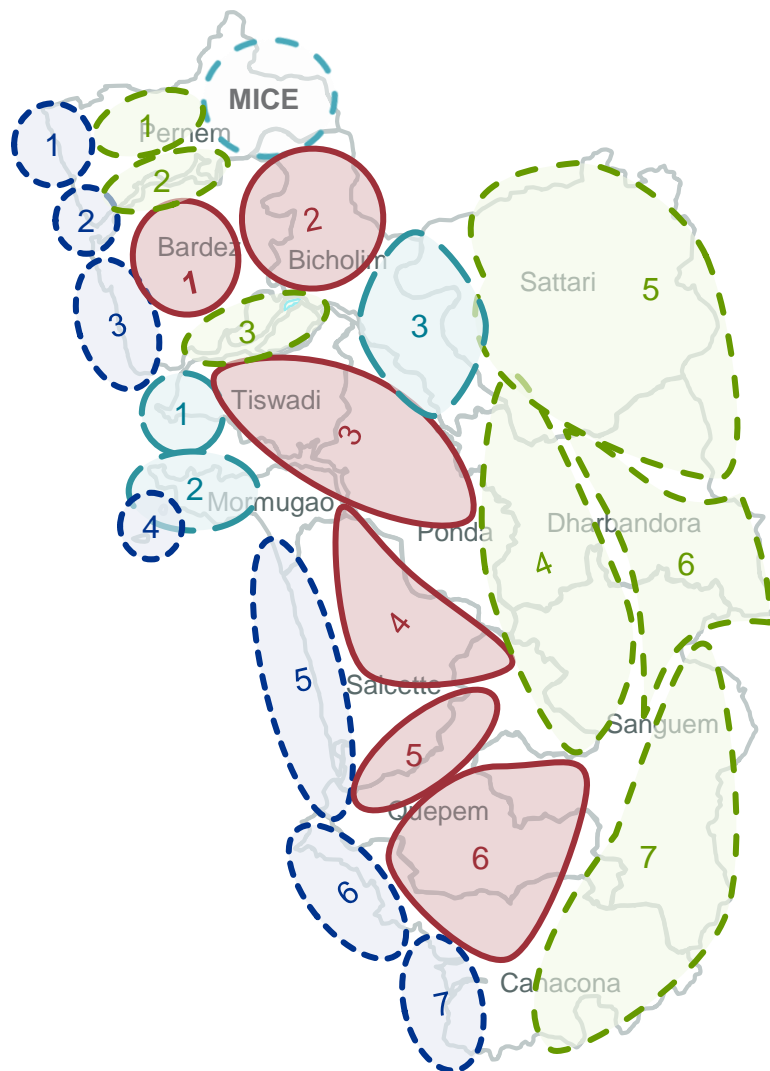
Spatial Planning for Goa based on the Tourism Products

Core - Coastal Tourism

- 1 Ultra luxury
- 2 Eco – Beach
- 3 Nightlife/ Party
- 4 Water Sports
- 5 Luxury acco. & high end retail
- 6 Beach Clubs
- 7 Eco - Beach

Core – Leisure/ Entertainment Tourism

- 1 Leisure & Entertainment / Culture & Cuisine
- 2 Cruise Catchment – Culture & Entertainment
- 3 Wellness Homestays
- 4 Adventure Sports



Core – Culture / Heritage Tourism

- 1 Homestays – Agri tourism / Culture/ Heritage
- 2 Community tourism
- 3 Heritage
- 4 Homestays – Village life/ Story telling/ Heritage
- 5 Heritage/ Village life
- 6 Community tourism

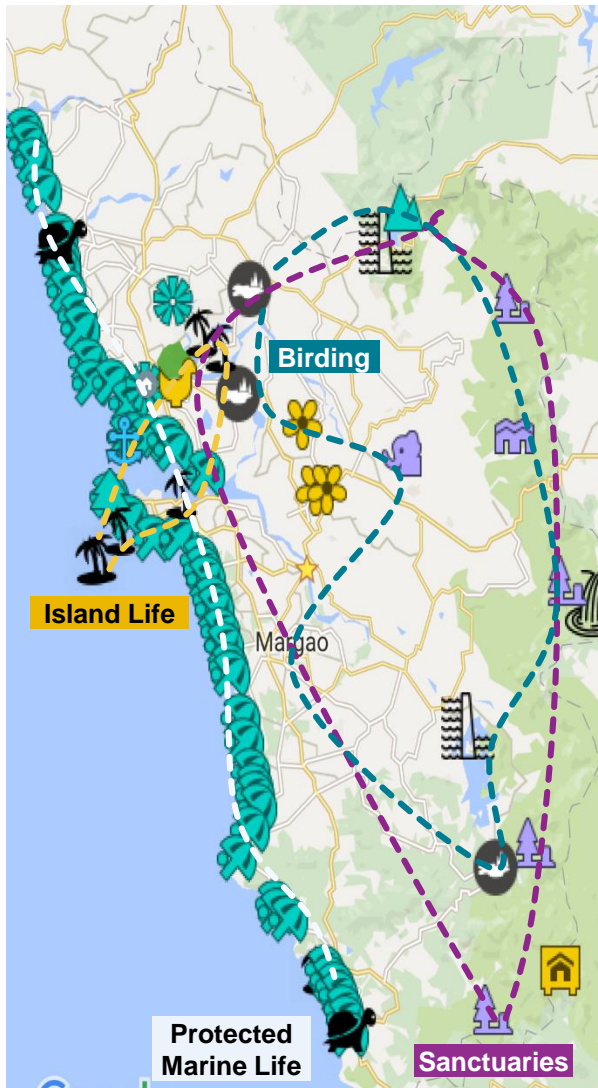
Core – Nature based and Eco-Tourism

- 1 High end Agri tourism
- 2 Riverside Promenade/ Spice Farms/ Jetties
- 3 Eco – Tourism/ Conservation
- 4 Agri/ Eco tourism
- 5 Community/ Eco/ Wellness
- 6 Nature based
- 7 Community/ Eco/ Wellness

Tourism Circuits Identification



Tourism Circuits Identification



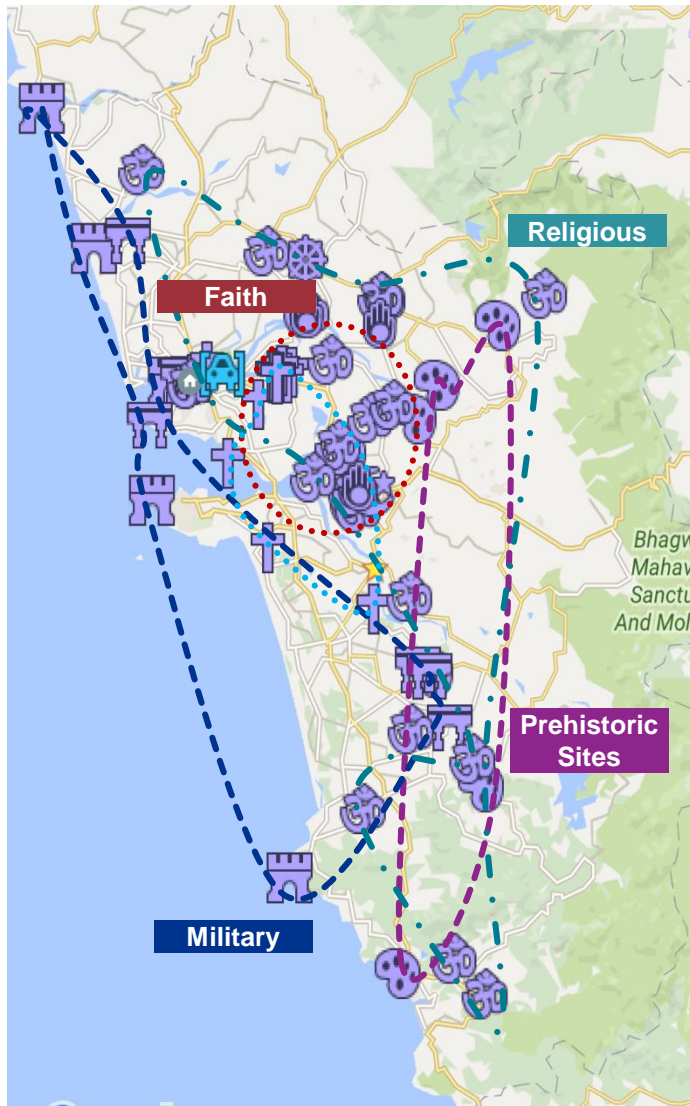
Nature/ Eco:

- **Scenic Routes**
- **Wildlife Sanctuaries**
- **Farms:** Spice/ Cashew/ Areca nut/ Coconut/ Rubber
- **Animal sighting**
- **Birding**
- **Protected marine life** (turtles nesting & dolphin experience)
- **Backwaters exploration**
- **Reptile/ Amphibian/ Insect viewing**
- **Best of Nature**

Facilitating Infrastructure:

- Interpretation Centre
- Signage's
- Walking tracks
- Signposted and secure trekking routes
- Local guides and interpreters
- Locals trained in the art of story telling
- Birding Towers and Tracks
- Circuit Itineraries, including travel options (possibly posted on the website)
- Accommodation including Glamping/ Camping Sites, hotels, cottages, tents, eco acco.
- Wayside Amenities - Food and drinking water facilities. washrooms, changing rooms

Tourism Circuits Identification



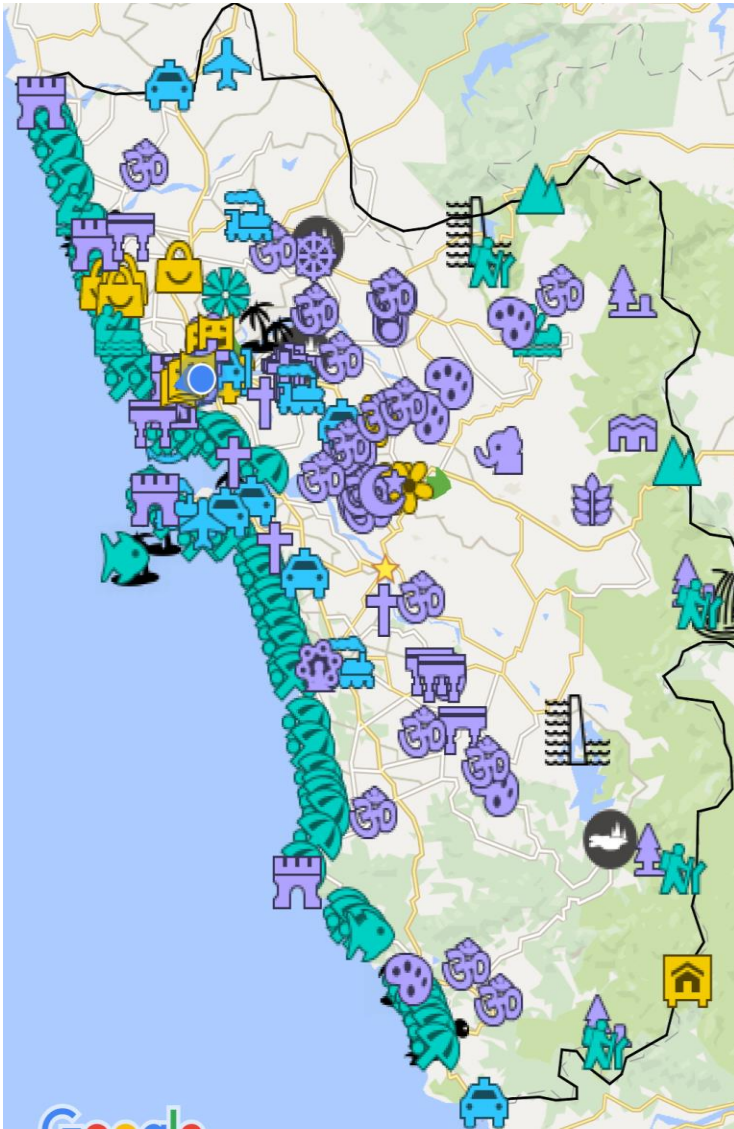
Culture / Heritage:

- **Military:** Forts
- **Religious :** Churches/ Temples/ Mosques
- **Portuguese heritage/ legacy:** Churches/ Houses
- **Goa Old Town** (City tour)
- **Charming villages**
- **Handicrafts route in villages** ('Azulejos' Tiles, Coconut, Woodcraft, Terracotta, Pottery)
- **Prehistoric sites** (Petroglyphs, Caves)
- **Culinary Tourism route** (including Feni & Wine)
- **Best of Culture**

Facilitating Infrastructure:

- Last mile connectivity
- Access for specially abled persons
- Interpretation Centres
- Signage's with asset details including heritage/ culture value
- Local guides and interpreters, including locals trained in the art of story telling
- Circuit Itineraries, including travel options (possibly posted on the website)
- Accessible Accommodation
- Food, drinking water, washroom and changing room facilities
- Village walking routes and stories catalogue
- Safety and hygiene programs for food safety

Tourism Circuits Identification



Transversal/ combined circuits:

- **River Cruise**
- **Train route** from North to South and West to East
- **Bicycle tracks** near rivers/ in Natural Parks
- **Trekking routes**
- **Beach circuits:**
 - Forts
 - Old Town
 - Turtle nesting
 - View Point
- **Hinterland circuits:**
 - Spice Farms
 - Wildlife
 - Waterfalls
 - River Cruise
 - Wellness in nature
- **Panaji Circuit**
 - Mandovi River Cruise
 - Bird Sanctuary
 - Old Goa
- **Best of Goa**

Facilitating Infrastructure:

- Interpretation Centres
- Information Kiosks and marketing material
- Signage's with asset details
- Local guides and interpreters
- Transportation Hubs
- Circuit Itineraries, including travel options (possibly posted on the website)
- Multiple accommodation types for various target travellers
- Food and drinking water facilities
- Town/ City/ Village walking routes
- Quality, safety and hygiene programs for food safety/ water sports/ adventure sports
- Garbage management

State interventions for tourism development

- **Accommodation Infrastructure**
- Up gradation and conservation of tourism assets
- Development of new assets
- Operating guidelines, accreditation, safety, hygiene and quality standards



State interventions required for the development of core tourism products through product development

	Accommodation infrastructure	Up gradation of Existing Assets	Development of new assets
Nature based ecotourism	<p>Village homestays (rural type)</p> <p>Eco lodges and Campsites</p> <p>Tree houses and Tented camps</p>	<p>Sightseeing, Cycling, Hiking trails, Motorbike routes</p> <p>Bird watching ,picnic spots organized walks</p> <p>Boating and Kayaking facilities</p>	<p>Flora and fauna exploration tours</p> <p>Adventure Park (Themed, Wet/dry)</p> <p>Nature interpretation center</p> <p>Mangrove discovery tours</p>
Coastal Tourism	<p>Medium spend accommodation</p> <p>Budget accommodation</p> <p>Eco friendly huts by the beach</p>	<p>Island trips, water based adventure sports</p> <p>Shacks/Roadside Bazaars/ Shopping streets</p>	<p>Beach clubs, Contained nightlife and accommodation hubs</p> <p>Cultural shows and Interpretation centers</p>
Culture and Heritage Tourism	<p>High spend homestays in heritage houses</p> <p>Budget accommodation for pilgrims near Old Goa</p>	<p>Visits to heritage temples and archaeological sites</p> <p>Heritage site interpretation centers</p> <p>Village walks, Local cuisine</p>	<p>Sacred Groves interpretation center</p> <p>Cycling tours and heritage walks</p> <p>Amusement Park - dry and wet rides, Segway's tours</p>
Leisure and Entertainment tourism	<p>Medium to High end accommodation</p> <p>Eco lodges and Campsites</p>	<p>White water rafting</p> <p>Passive adventure sports, e.g.: treks, hikes and trails</p> <p>Local F&B options, Japanese Garden and beach development</p>	<p>Active adventure sports, e.g.: mountain climbing, bungee jumping.</p> <p>Waterfront facilities for cruise passengers</p> <p>Shopping avenues - Handicrafts/ Souvenirs/ Local wares</p>

State interventions required for the development of complementary tourism products through product development

	Accommodation infrastructure	Up-gradation of existing assets	Development of new assets
Rural and Community Tourism	Village homestays (rural type), Eco lodges and Campsites, Tree houses	Sightseeing, Hiking Trails, Cashew/Feni Trails, Botanical garden	High end spa-rejuvenation centers, Wildlife exploration tours
MICE Tourism	Business Accommodation	Outbound facilities , Wellness centers	Entertainment districts , Yoga/Nature cure centers
Nautical Tourism	High end coastal accommodation, shacks, Houseboats	Local F&B options , Boat tours and coastal sightseeing	Waterfront facilities, Marinas, Yachting
Culinary Tourism	Medium to high end accommodation	River cruises , promotion of arts and cultures	Riverside walkways / Streetmosphere, F&B streets
Health and Wellness Tourism	Homestays, low-medium end accommodation, eco-cottages	Yoga and Wellness facilities	Yoga Teacher training institutes, Ayurveda-Nature Cure Center
Short Breaks	High end-Low density accommodation	River cruises, jetties, Spice plantations	Riverside promenade, island tours, Nature trails

State interventions for the development of tourism products through operating guidelines

Coastal Tourism



- Guidelines for water sports and beach facilities development
- Policy on public services e.g. parking, restrooms, walkways

Cultural/ Heritage Tourism



- Guidelines for packaged tours for tourism circuits
- Guidelines for asset maintenance and event management.

Nature-based & Ecotourism



- Guidelines for nature trails, interpretation centers ,Public services
- Policy for protected zones and biodiversity.

Leisure / Entertainment Tourism



- Guideline for sports complex, marinas and casinos
- Guidelines for entertainment districts, promenades, streetmospheres

Rural/Community Tourism



- Guidelines for eco camps, interpretation centers tourist guides

Health & Wellness Tourism



- Policies for wellness/spa center and training centers

Culinary Tourism



- Guidelines for hygiene-quality of food outlets and training for staff

MICE Tourism



- Guidelines for convention centers and training of manpower for such works

Nautical Tourism



- Policies for waterfront development , cruise operations

Short Breaks



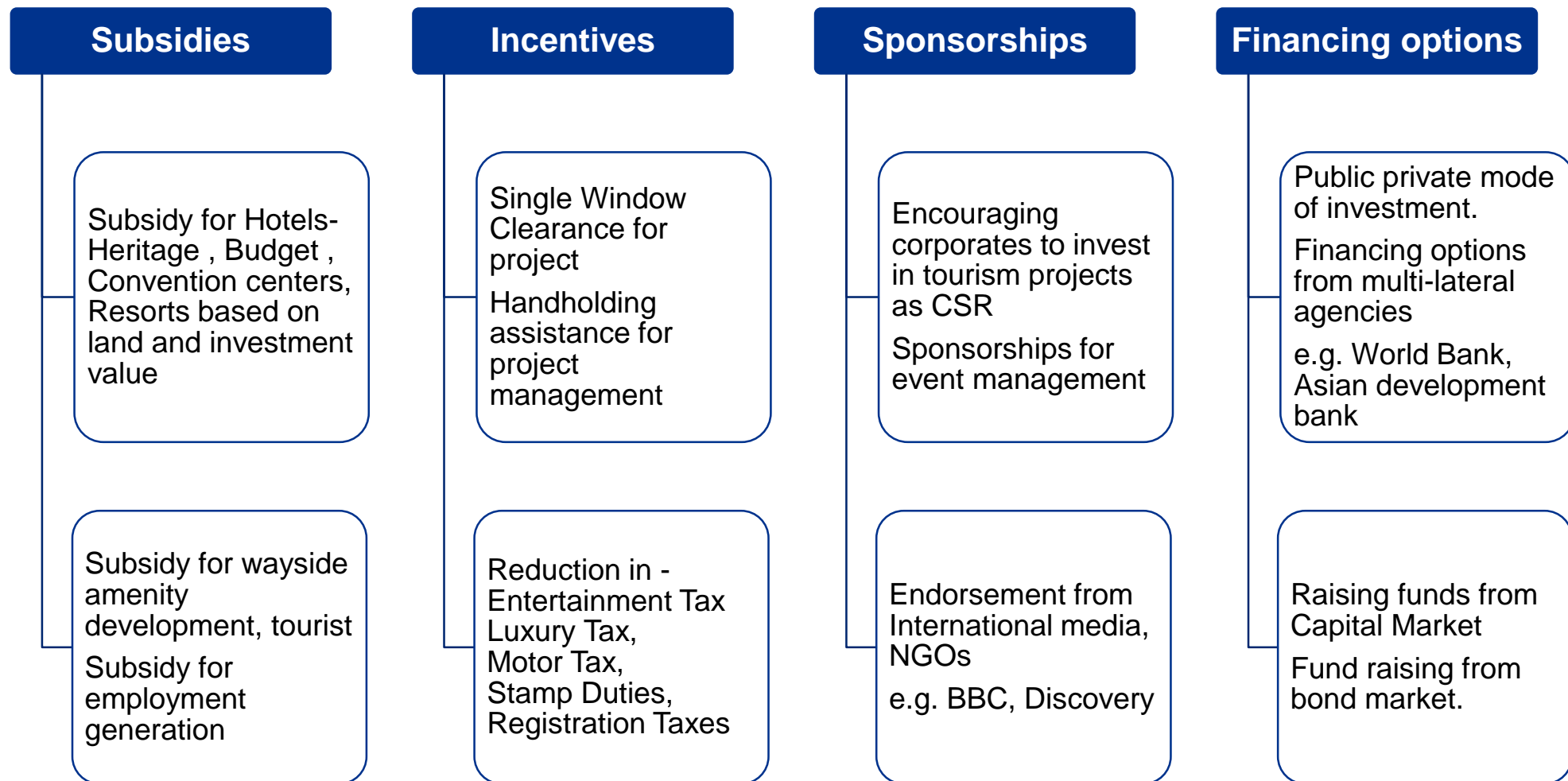
- Guidelines for short duration packages and accommodation

Complementary Products

Policy development needs to cater both tourist needs and Governmental prerogatives

Perspectives <div> <div>Tourist</div> <div>Government</div> </div>	Reservation <ul style="list-style-type: none"> Foreign exchange kiosks for foreign tourists Policy for cashless transactions / alternate payment channels 	Transport <ul style="list-style-type: none"> Policy incentives for public transportation within state. Policy development of improving rail/air connectivity. 	Accommodation <ul style="list-style-type: none"> Policies for Eco-cottages, Homestays, Ayurveda resorts Incentives for Youth hostels, Yatri Niwas development 	Food <ul style="list-style-type: none"> Training in best practices of housekeeping / hygiene standards. Skill development in Hotel management. 	Public convenience <ul style="list-style-type: none"> Policy for information centers and signage for tourists. Policy of water, electricity and restrooms at tourist sites.
	Marketing and Promotions <ul style="list-style-type: none"> Guidelines on increasing positive media presence Policies for event calendars, marketing campaigns 	Capacity Development <ul style="list-style-type: none"> Guidelines for professional and vocational courses Licensing and certification of service providers 	Employment Generation <ul style="list-style-type: none"> Certified training programs for guides, operators Development of professional network across geographies 	Sustainability development <ul style="list-style-type: none"> Guidelines for environmental impact assessments of projects Policies on maintenance and preservation of assets 	Safety and Security <ul style="list-style-type: none"> Guidelines for tourist security force Guidelines for cloak rooms, change rooms

Adequate channeling of investments is required to materialize the tourism growth plans



Key takeaways towards building a holistic Goa Tourism Master Plan and Policy



- A holistic approach encompassing **development of tourism products, infrastructure amenities and channeling investment** is essential to foster sustainable growth in the tourism sector
- Goa tourism' **USP's** should be harnessed for tourism development in a **sustainable** manner, taking care to conserve our **authenticity** and promoting **seamless travel**
- A **structured approach** towards tourism development through the **core and complementary tourism product strategy** is encouraged for sustainable tourism development in the state
- Major focus is put on **increasing length of stay of travelers, spend per traveler and encouraging repeat visits** through provision of a multitude of **tourist facilities and activities**
- Towards prevention of mass tourism in certain pockets of the state, a spatial plan covering the state is proposed for streamlined tourism development across the state
- Tourist circuits have been suggested across tourism types for providing tourists an opportunity to discover tourism products in depth
- The tourism sector needs to be developed in a streamlined manner with the State channeling investments and providing policy support as covered. It also forms a very important role in providing and ensuring adherence to safety and quality guidelines across the tourism value chain
- **These factors explored in this submission are expected to form a structured basis for formulation of the Tourism Master Plan, Policy and Institutional Framework in subsequent modules, where these topics would be elaborated in further detail.**



Thank You

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Annexure : Area breakup across Government of Goa entities

Forest Department Lands	
Protected Areas	Area (sq.km)
Bhagwan Mahaveer Wildlife Sanctuary	133.00
Bhagwan Mahaveer National Park	107
Bondla Wildlife Sanctuary	8
Dr. Salim Ali Bird Sanctuary	1.8
Mhadei Wildlife Sanctuary	208.5
Netravali Wildlife Sanctuary	211
Cotigao Wildlife Sanctuary	86
Total	755.3
Ownership details for areas under jurisdiction	Area (sq.km)
Government	1224.4
Private	200
Total	1424.4
District distribution (Government land)	Area (sq.km)
North Goa	658.8
South Goa	565.6

Directorate of Agriculture Lands		
Farm	Village/ Taluka	Area (ha)
Codar Farm	Kodar Ponda	110
Kalay Farm	Sanguem	62
Dhavem farm	Valpoi	7
Ela farm	Ela-Old Goa	16
Pernem	Pernem	10
Durga	Margao- Salcete	28
Margao	Margao Salcete	3.5
Mapusa	Mapusa Bardez	3.7
Total		240.2

Department of Tourism Lands	
Full property available	
Location	Area (sq.m.)
South Goa	30,755
Part of Property available	
South Goa - DoT	1,31,179
North Goa - DoT	31,405
South Goa - GTDC	55,282
North Goa - GTDC	2,68,045
Total	4,85,911



Microsoft Excel
Worksheet