



Preparation of Goa's Tourism Master Plan and Policy

Draft Report – Final Presentation and report on Module 3:
Development of Draft Tourism Master Plan for Goa

Department of Tourism, Government of Goa

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4. This report is being submitted to the Department of Tourism, Govt. of Goa ('DoT') as part of the 'Final Presentation and report on Module 3: Development of Master Plan' for our engagement of assisting DoT in the "Preparation of the Tourism Master Plan and Policy for Goa." This report sets forth our views based on the completeness and accuracy of the facts stated to KPMG and any assumptions that were included. If any of the facts and assumptions is not complete or accurate, it is imperative that we be informed accordingly, as the inaccuracy or incompleteness thereof could have a material effect on our conclusions.
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7. This report should be understood as the final report only after suggested changes, if any, are incorporated into the report.
8. 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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10. Our analysis is based on the prevailing market conditions and regulatory environment and any change may impact the outcome of our review.
11. We have indicated in this report the source of the information presented. Unless otherwise indicated, we have undertaken no work to establish the reliability of those sources or to evidence independence of the relevant source.

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13. Our views are not binding on any person, entity, authority or Court, and hence, no assurance is given that a position contrary to the opinions expressed herein will not be asserted by any person, entity, authority and/or sustained by an appellate authority or a Court of law.
14. Performance of our work was based on information and explanations given to us by the Client. Neither KPMG nor any of its partners, directors or employees undertake responsibility in any way whatsoever to any person in respect of errors in this report, arising from incorrect information provided by the Client.
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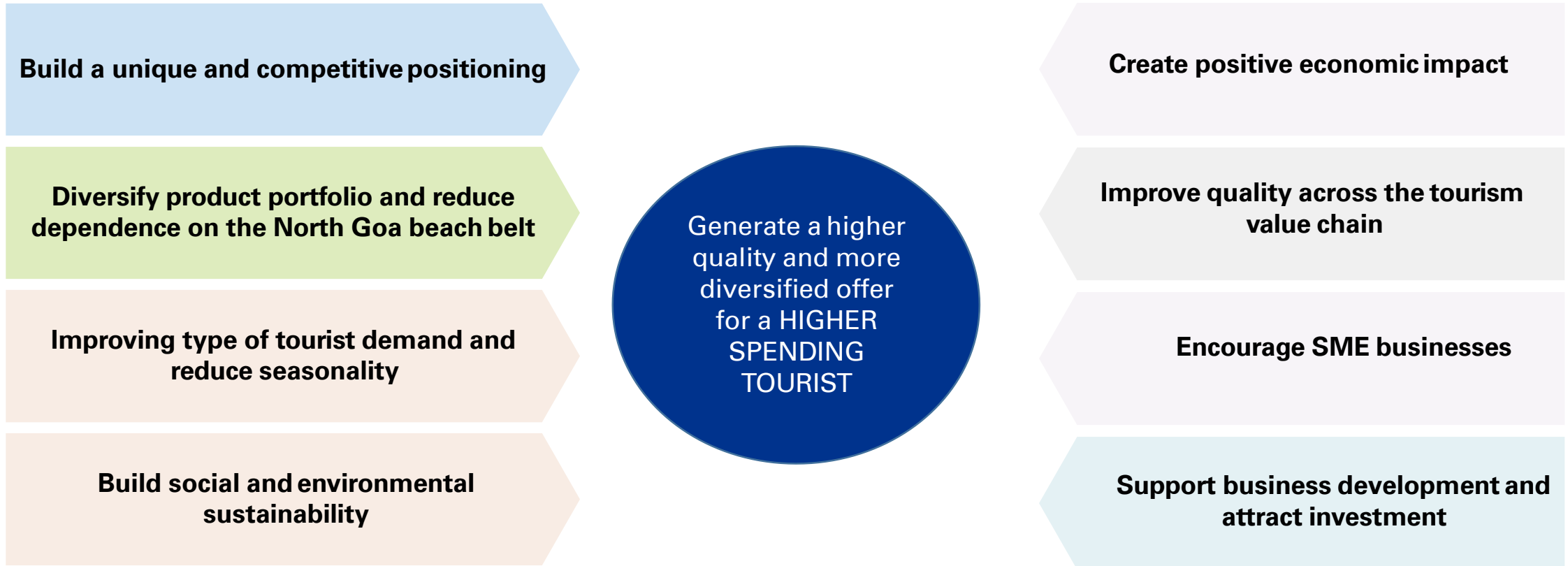
1.

**Development
model****Development Strategies****Qualitative tourism goals**

- Positioning
- Products
- Markets

Quantitative tourism goals**Development principles & guidelines**

Key strategies for development of the Master Plan

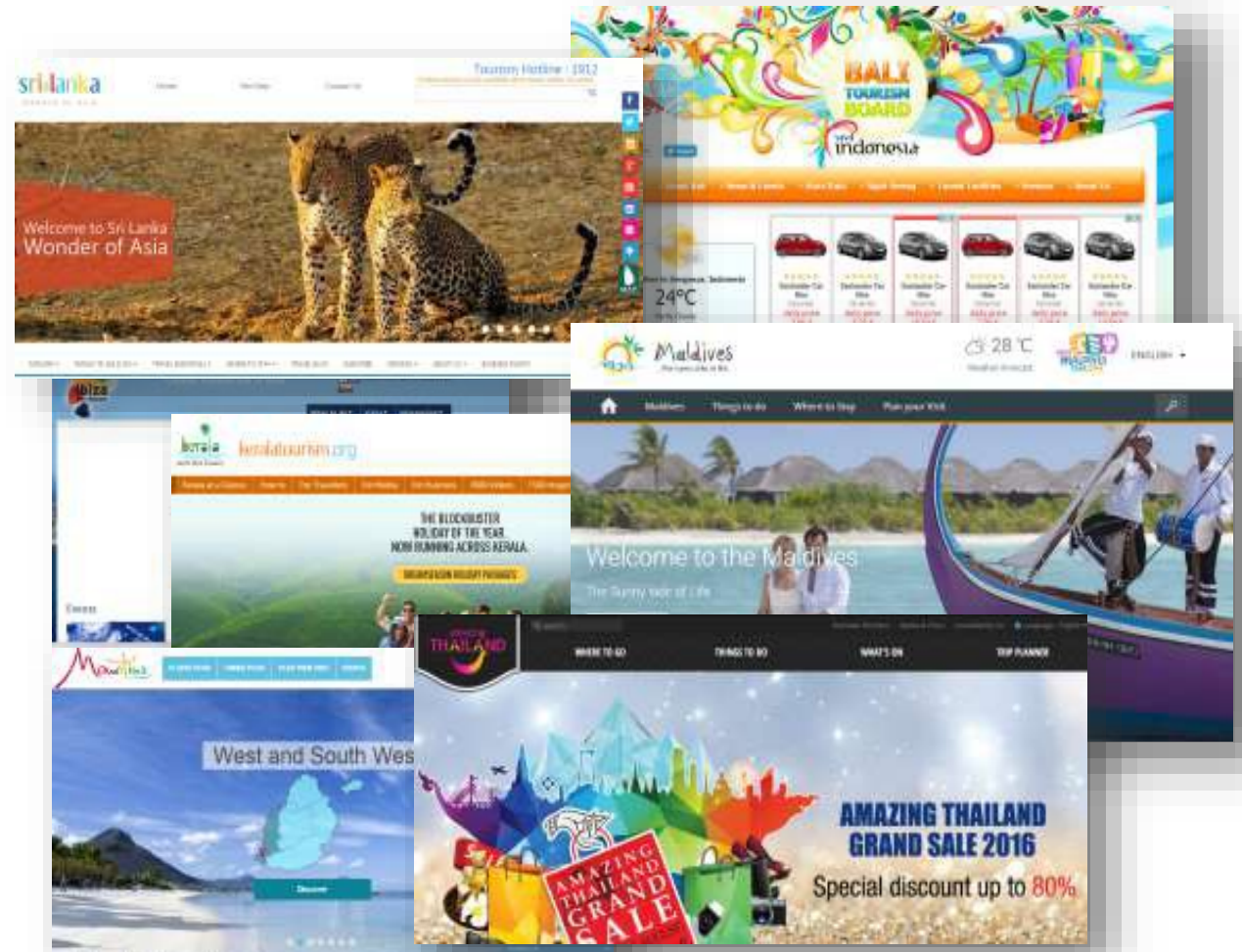


While safeguarding and improving tourism and general socio-economic interests of Goan stakeholders

Positioning analysis through website benchmarking of similar tourism destinations

Benchmarking principles

- All selected destinations are well known for their wide offering in Coastal and Sun & Beach tourism
- The benchmark is based on an analysis of the official websites for each destination
- It is assumed that the website is one of the major tools used by tourism destinations organizations to promote and highlight products and experiences. Therefore, we can ensure that destination website is essential to position the brand




Positioning analysis through website benchmarking of similar tourism destinations


An analysis has been conducted in order to understand the key attributes in each destination website.

“High presence” - attribute appears in the main page or in a highlighted area. Medium presence - navigation process through different search menus. Low presence - difficult to find or it limited availability


Country	Sri Lanka	Bali	Ibiza	Kerala	Maldives	Mauritius	Thailand	Goa
Culture & Heritage			★	★				
Nautical Tourism								
Sports & Adventure		★						★
Health & Wellness						★		
Business & MICE								
Family Tourism								
Culinary Tourism								
Shopping							★	
Nightlife								
Sun & Beach								
Nature Tourism	★							
Luxury Tourism					★			




Core attributes



High presence



Medium presence



Low presence

Positioning analysis through website benchmarking of similar tourism destinations

Benchmark observations

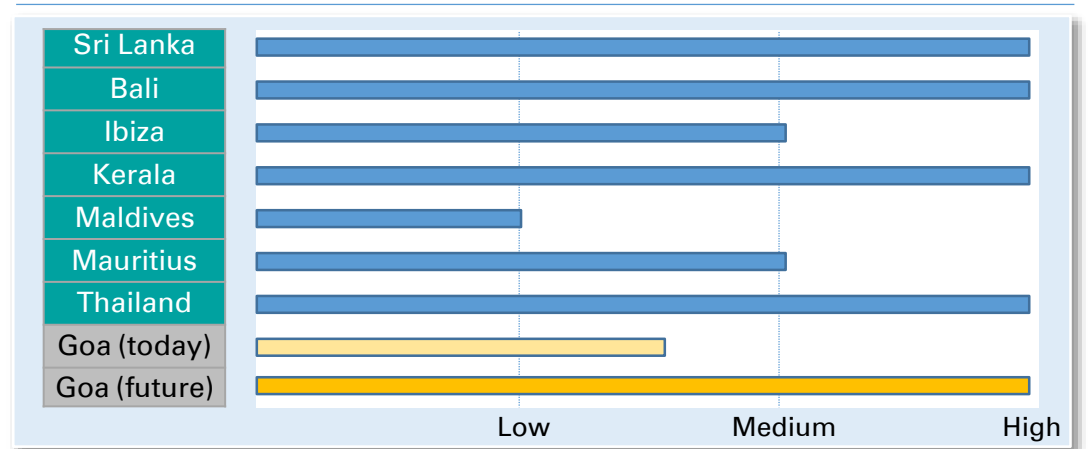
- All listed destinations are known for their coastal tourism offer. However, Sun & Beach (Coastal) tourism is not enhanced as the core attribute of these destinations.
- It is assumed that the destination has “taken for granted” that tourists know about this offer and they choose to highlight other products which they want to promote.
- All these destinations give high or medium importance to Culture & Heritage (except Maldives), Sports & Adventure and Nautical Tourism (except Sri Lanka and Thailand)
- All these destinations present a high diversification in their product portfolio across 6-10 products with high / medium presence
- Within this context, some websites concentrate their web communication in limited products to enhance them:
 - ✓ Maldives highlights luxury tourism
 - ✓ Kerala focuses on Culture & Heritage
 - ✓ Thailand emphasizes Shopping
- Nightlife is not highlighted greatly, even in destinations like Ibiza or Thailand, famed for this feature. This could probably denote that either they do not need to promote these features as they are already well known (similar to Sun & Beach tourism product); or that they do not prefer advertising this type of product due to possible negative connotations.
- **Goa’s website provides a wide set of activities** within the “Explore” and “Things to do” sections. The home page does not focus on specific positioning in terms of its destination or its products, “White water rafting” appears as the first highlighted product.

Positioning matrix: Goa aims to become a multi-product destination, where culture & heritage and leisure & entertainment would play a major new role

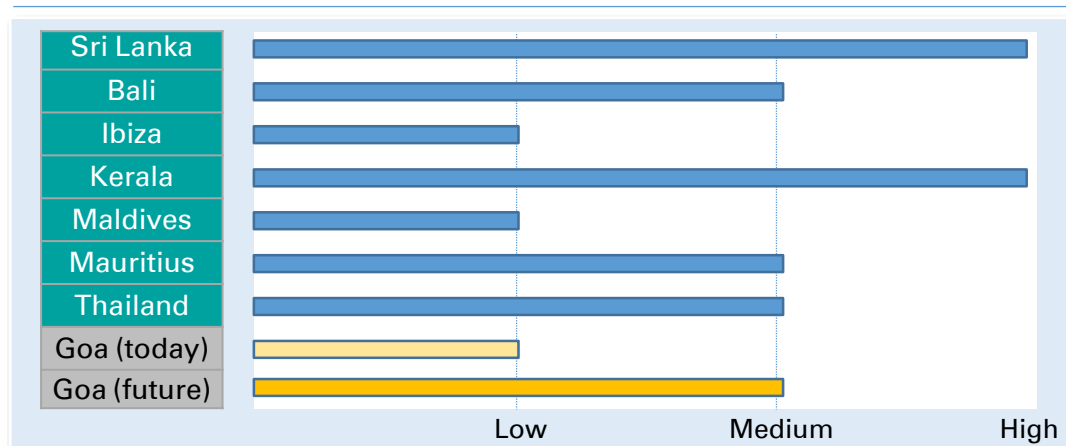
Coastal Tourism (incl. Sun & Beach, Nature, Sports & Adventure)



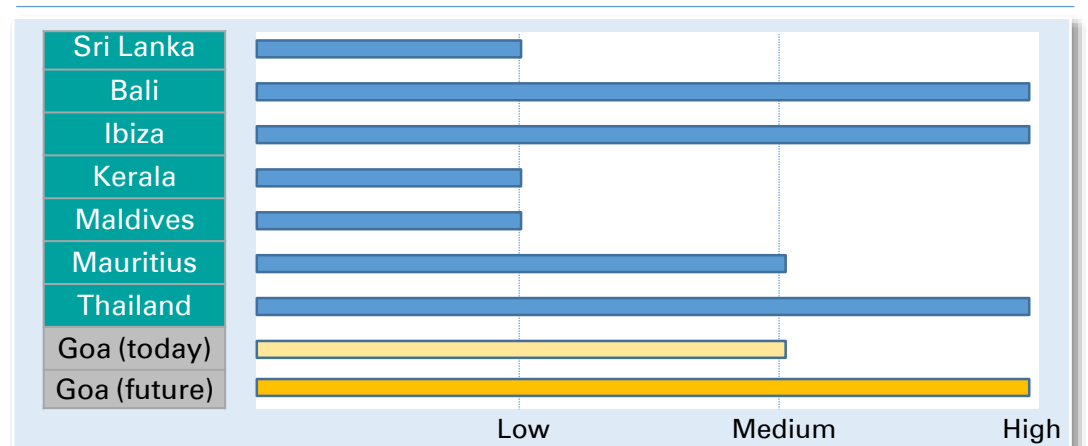
Culture & Heritage (incl. Culture & Heritage, Culinary Tourism)



Nature Based Tourism (incl. Nature Based)



Leisure & Entertainment (incl. Nightlife, Shopping, Health & Wellness)



Qualitative tourism goals - Positioning matrix - Goa's positioning vs type of visitor

	Current		Future		Marketing Strategy
	International	Domestic	International	Domestic	
<p>●●● High intensity</p> <p>●●○ Medium intensity</p> <p>●○○ Low intensity</p>					
1 Coastal Tourism	●●○	●●●	●●○	●●●	Establish new strategy to attract high spending visitors with focused efforts on development of tourism activities for an involved stay
2 Culture & Heritage	●○○	●○○	●●●	●●○	Develop an innovative cultural offering, especially in the hinterlands
3 Nature Based Tourism	●●○	●●○	●●○	●●○	Use this product category mainly for diversification purpose
4 Leisure & Entertainment	●●○	●●●	●●○	●●●	Focus on families entertainment & activities portfolio

Qualitative tourism goals - Repositioning Goa as a multi-product destination

Proposed evolution of Goa as a Tourism Destination

- Evolve from a majorly Sun & Beach tourism destination to a **Coastal tourism destination**
- Develop a multi-product destination where **Culture & Heritage will play a major role** to attract both international and domestic tourists.
- **More diversified and quality leisure & entertainment offer**, mainly addressed for domestic tourists
- **Nature-based tourism** will be a focus product

Qualitative tourism goals - Geographical markets strategy

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

Very short term: on going/ current markets

Short term: 2 - 4 years

Medium term: within 5 years

Very Short term

Keep addressing domestic market & current nationalities but with a different proactive marketing approach

Higher-spending segments within the coastal tourism product with a better and more diversified offer, including culture and nature tourism

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

Short term

Develop the cultural tourism offer of Goa to attract these nationalities. This would be the main motivation to visit India – and Goa as an extension











Though most tourists would still stay on the coast, culture and nature-based tourism would be a main travel motivation for some tourists and complementary products for others.

Medium term

Depending on identified new opportunities, further diversify markets such as Australia, through a multi-product destination, where cultural tourism would play a major differentiation role.

Products / geographical market strategy: attractiveness levels

- High intensity
- Medium intensity
- Low intensity

	Very short term markets (existing/ current)						Short term markets			Mid term
										
Coastal Tourism	●●●	●●●	●●●	●●●	●●●	●●●	●●○	●○○	●○○	●●○
Culture & Heritage	●●●	●●●	●●●	●●○	●●○	●●○	●●●	●●●	●●●	●●●
Nature – Based Tourism	●●○	●●○	●●○	●○○	●●○	●●○	●○○	●●○	●●○	●○○
Entertainment & Leisure	●●○	●●○	●●○	●●●	●●●	●●○	●○○	●●●	●○○	●●○

Quantitative tourism goals – for higher spending tourists with increased international tourism

Scenarios analysed for total tourist arrivals (2017 to 2031) – Current/ Normalized/Optimistic		
Current scenario	Normalized scenario	Optimistic scenario
<ul style="list-style-type: none"> Tourist arrivals calculated based on DoT statistics; change in calculation methodology not factored Compounded Annual Growth Rate (“CAGR”) – 6.62% (1985 to 2015) 2031 projected total arrivals – 14.7mn 	<ul style="list-style-type: none"> Tourist arrivals calculated post the normalisation of CAGR numbers due to additional sources of information from tourist entry points being considered in arriving at inbound tourist statistics; namely <ul style="list-style-type: none"> Railway stations KTCL bus transport services Private bus operators Vehicle tolls on State borders CAGR – 4.51% (2009 to 2013) 2031 projected total arrivals – 10.7mn 	<ul style="list-style-type: none"> Tourist arrivals calculated based on a CAGR which factors in the long term impact of the Tourism Master Plan CAGR – 7.00% 2031 projected total arrivals – 15.6mn

- The Current and Optimistic scenarios are fairly similar in absolute numbers, however the calculation methodology of the total tourist arrivals in the Current scenario has not been uniform over the years.
- These changes in methodology have affected the historic CAGR, hence a CAGR using a normalized scenario has been applied for the purpose of projections
- The base for all scenarios are actual 2015 tourist arrival numbers, normalization has been conducted on the CAGR only.

Focus of tourism growth will be on

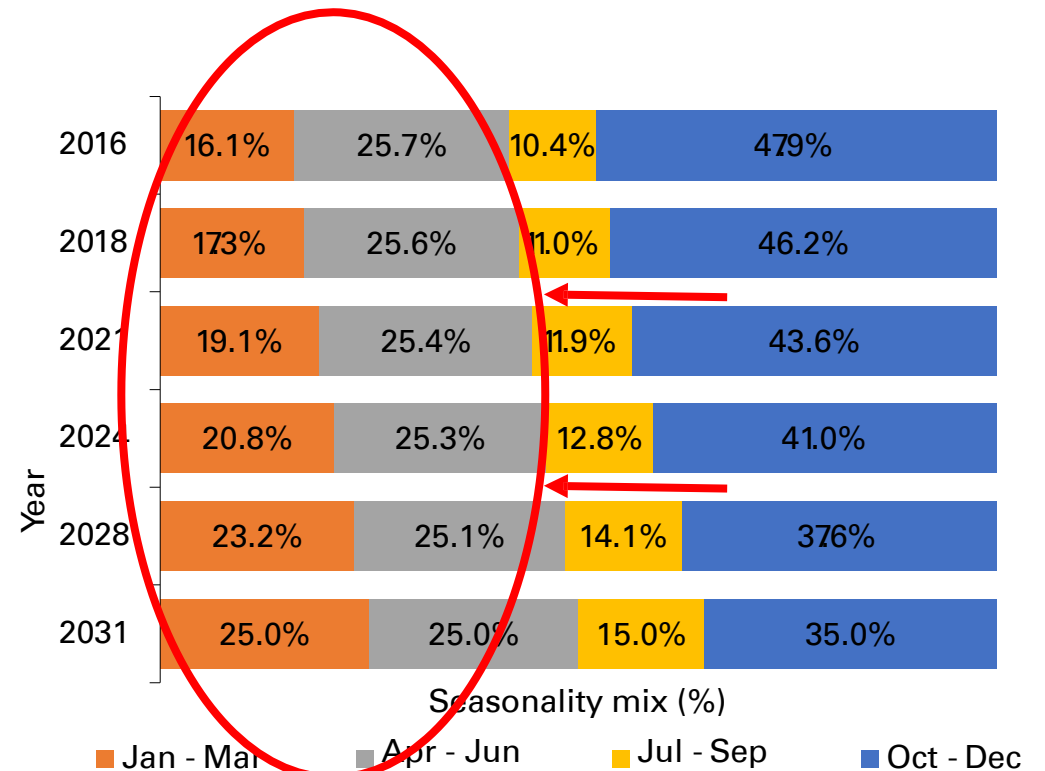
1. International tourism - Limited growth and increased number of higher spending
2. Domestic tourism - Limited growth and shift to higher spending
3. Healthy mix of domestic and international tourists from 90 – 10% (current) to 80 – 20% by 2031

Source : DoT Goa

Quantitative tourism goals - reducing seasonality

Seasonality benchmark goals

- **Need for reducing seasonality** – High seasonality features high congestion during peak season and lower asset utilization during periods of low demand
- **Benchmark Seasonality** –
 - Jan to Mar – 25%
 - Apr to Jun – 25%
 - Jul to Sep – 15%
 - Oct to Dec – 35%
- **Methods to reduce Seasonality** –
 - Increased utilization of Culture, Heritage, Nature, Eco-tourism, MICE and Edutainment tourism products during the non Oct – Dec periods
 - Increased arrivals at events like Carnival & Shigmotsav

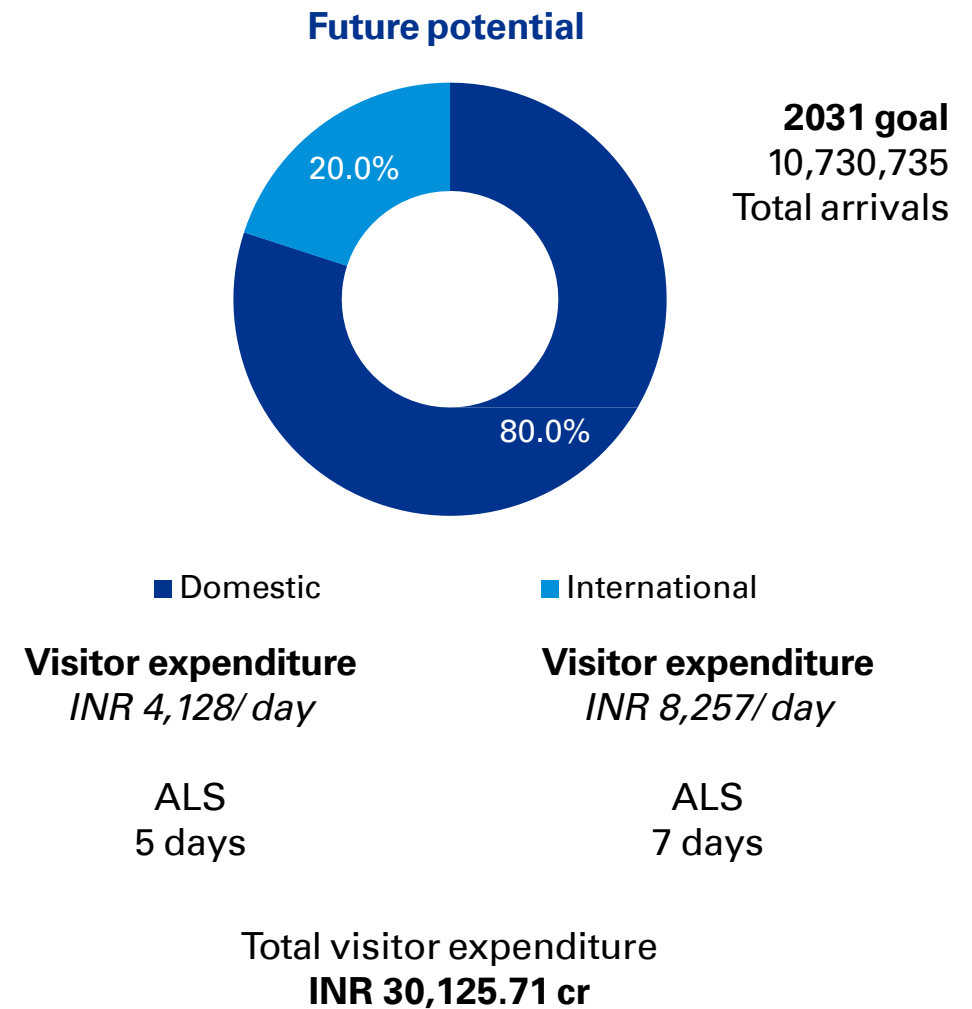
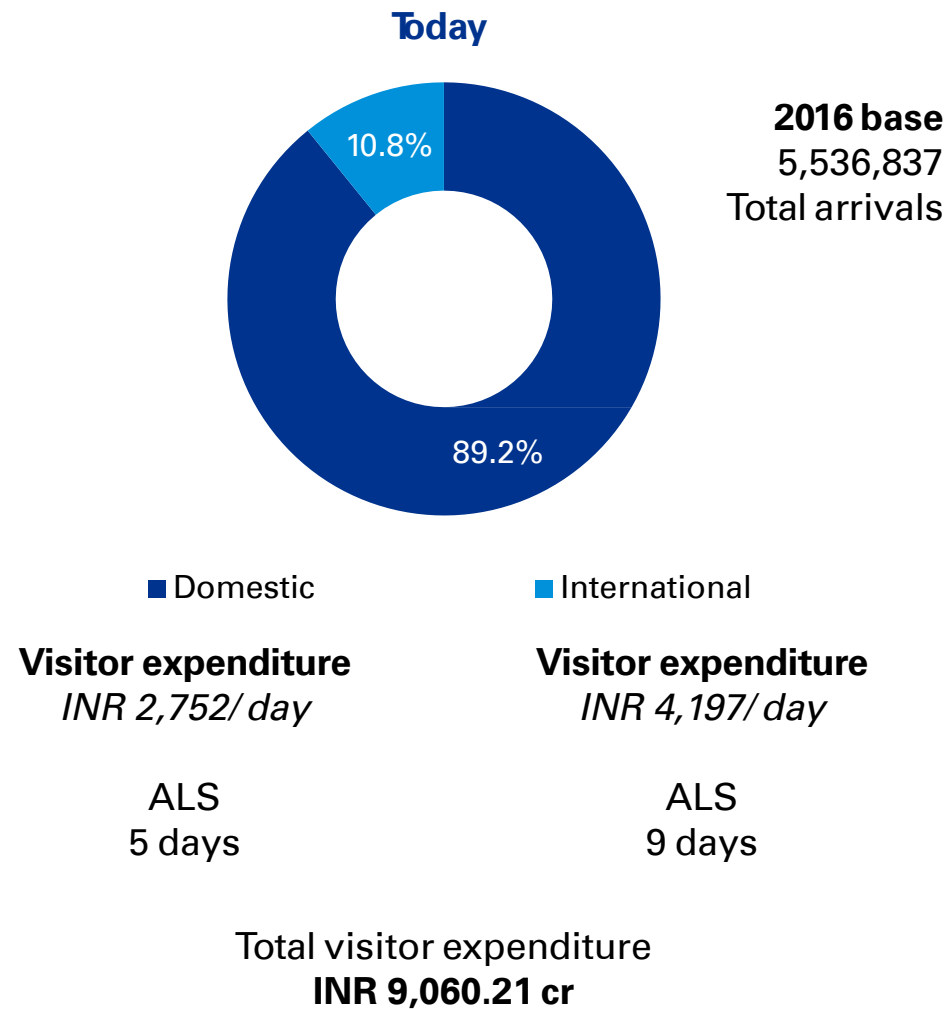


Quantitative tourism goals - estimate of revenues*

	2016 base	2021 goals	2026 goals	2031 goals	CAGR 2016 - 31	Multiplier Ratio
Domestic Market						
Arrivals (million)	4,937,095	5,944,498	7,148,444	8,584,588	3.8%	1.74
Average length of stay (ALS)	5	5	5	5	0%	1.00
Visitor expenditure (INR/day)	2,752.4	3,168	3,557.6	4,128.6	2.8%	1.50
Revenue (INR cr.)	6,794.3	9,369.2	12,901.9	28,408.9	6.6%	2.61
International Market						
Arrivals (million)	599,742	958,711	1,458,327	2,146,147	8.9%	3.58
Average length of stay	9	8	7	7	-1.7%	0.78
Visitor expenditure (INR/day)	4,197.4	5,229.56	6,605.8	8257.2	4.6%	1.97
Revenue (INR cr.)	2,265.9	4,030.9	6,718	12,411	12.0%	5.48
TOTAL (Domestic + International)						
Arrivals (million)	5,536,837	6,903,209	8,606,771	10,730,735	4.5%	1.94
Average length of stay	5.4	5.4	5.3	5.4	0%	1.00
Visitor expenditure (INR/day)	3,027.6	3,578.1	4,266	5,229.6	3.7%	1.73
Revenue (INR cr.)	9,060.2	13,400	19,617.7	30,125.7	8.3%	3.33

*Normalized scenario (Ref. earlier slides) at constant prices

Quantitative tourism goals*



*Normalized scenario (Ref. earlier slides) at constant prices

Quantitative tourism goals - impact on employment and GDP*

	2021	2026	2031
Incremental employment creation			
Employment: direct contribution	1,21,760	1,72,979	2,55,421
Employment: total contribution	3,52,463	5,00,731	7,36,483

- ❑ Tourism contributed to 17% of total employment (85,000 to 100,000 employed workforce) in Goa in 2013
- ❑ With the initiatives planned and growth of capacity in terms of hotels, the incremental direct employment and the total employment (direct, indirect and induced) generated is as above

	2016 base	2021 goals	2026 goals	2031 goals	CAGR 2016 - 2031	Multiplier Ratio
Total contribution to GDP						
GDP: total contribution (in INR Cr.)	16,308	24,120	35,319	54,227	8.3%	3.32

(*) Normalized scenario (Ref. earlier slides) at constant prices

Source: Tourism Sector in India, Parliament library and reference, research, documentation, and information service

Quantitative tourism goals - tourism arrivals goals compared to other reference destinations





	International Arrivals		Domestic Arrivals	Total Arrivals	Foreign Arr. forecast	Growth rate
	2015 (p)	2016 (e)	2015 (p)	2015 (p)	2026 (e)	2016/2026 (e)
1 Goa	541,480		4,756,422	5,297,902	1,458,327	+269%
2 Sri Lanka	1,904,000	1,937,000			4,100,000	+215%
3 Bali	4,001,000	4,601,000	7,147,100	11,148,100	Not available	
4 Ibiza	2,546,400		862,000	3,408,400	Not available	
5 Kerala	977,479		12,465,571	13,443,050	Not available	
6 Maldives	1,303,000	1,350,000			2,200,000	+69%
7 Mauritius	1,154,000	1,173,000			1,700,000	+47%
8 Belize	316,000	315,000			450,000	+42%

Development principles and guidelines

Principles

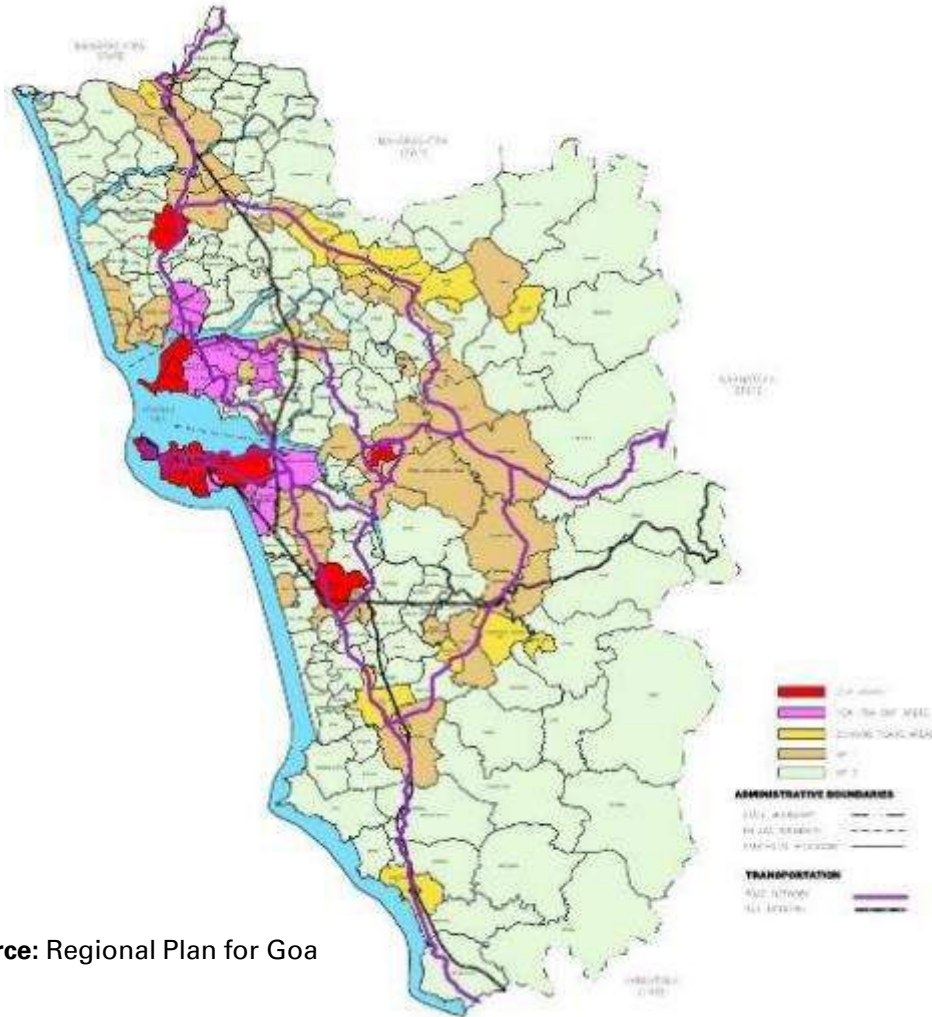
- Elaborate a tourism development plan that is **acceptable to the stakeholders of Goa**, with an emphasis on enhanced quality and quantity of higher spending tourists, both domestic and foreign
- Achieve this goal through a **strong diversification of the tourism product using all relevant and varied tourism assets, wherever they are located**
- **Consider the entire State as a potential tourism development area**, which implies changing the past and current development pattern focused on the coast
- **Conserve the natural and cultural assets deemed of high value by stakeholders** which act as major attractions for tourism, on the coastal stretches not yet developed and in the hinterlands
- **Address existing and future development requirements highlighted by** creating physical plans that respond to that direction.
- **Phase tourism development** so that there are opportunities in the near term (2-5 years) and for a 10 year period from now.
- Take a broad look at sustainability, which **implies ensuring low scale tourism development in the hinterlands of the State** respectful not only with nature but also with the local culture, in line with the principles established in the Goa Regional Development Plan
- Provide a **conceptual tourism planning model** that considers all these principles at State, Taluka and local specific levels.
- **Identify specific potential locations or locations' profiles** for redevelopment, enhancement and/or new development.

Development principles and guidelines

Tourism Development Intensity	Protected Areas	Low - Medium Tourism Development		Mass Tourism Development
	<ul style="list-style-type: none">Nature sanctuaries in the hinterlands and the coast,Pristine beaches in certain talukas to be protected from high pressure in terms of possible development through high quality offerings	<ul style="list-style-type: none">Coastal areas: applies to parts of the coast, mainly in the upper North and mid/ extreme South, where no/ limited development is present.Hinterland areas (Ghats and Midlands): Applicable for developments in designated areas to create “clusters” of nature/ culture-based attractions/ activitiesLow density should also be paired with lowrise buildings (Ground floor only or GF+1)		<ul style="list-style-type: none">Present on the Goan coast in stretches, as well as in some urban areas“Mass” development could be authorised in specific new designated places such as next to airport or development for specific programs
Area Development Density (units/ hectare)	Density models – Built up units (such as apartment/ room) per hectare, thus shaping the landscape and scenery			
	Applicable to Hinterlands And Coastal Areas			In some Coastal/ Urban Areas/ near Airport
	Untouched nature	Low density (5 - 20 units / per ha)	Medium density (21- 50 units/ ha)	High density (60+ units /ha)
	 <p>Applies to designated fully protected areas, where no building is authorized and day access to visitor shall be regulated and monitored</p>	 <p>In the hinterlands, low-medium density development should be allowed in specific projects contributing to the creation of tourism clusters or singular projects. It is essential to allow for derogation of the Regional Plan specifications to enable socio-economic development of the hinterlands Talukas (Midlands and Ghats).</p>		 <p>In present state highly developed areas</p>

Revised Regional Plan density targets seem to be in line with tourism needs

Maximum permissible Built Up Area statements



Source: Regional Plan for Goa
2021

VP 1

(Low density areas)

Maximum height = 11.5 m



Plot areas below 4,000
sqm

FAR (ratio) = 80



Plot areas 4,000 sqm
and above

FAR (ratio) = 60

VP 2

(Very low density areas)

Maximum height = 9 m



Plot areas below 350
sqm

FAR (ratio) = 80



Plot areas below 4,000
sqm

FAR (ratio) = 60



Plot areas 4,000 sqm
and above

FAR (ratio) = 50

Specific development guidelines for the Coast

Low- Medium density resorts developed and or operated by international brands to better position the destination with **sustainable projects**

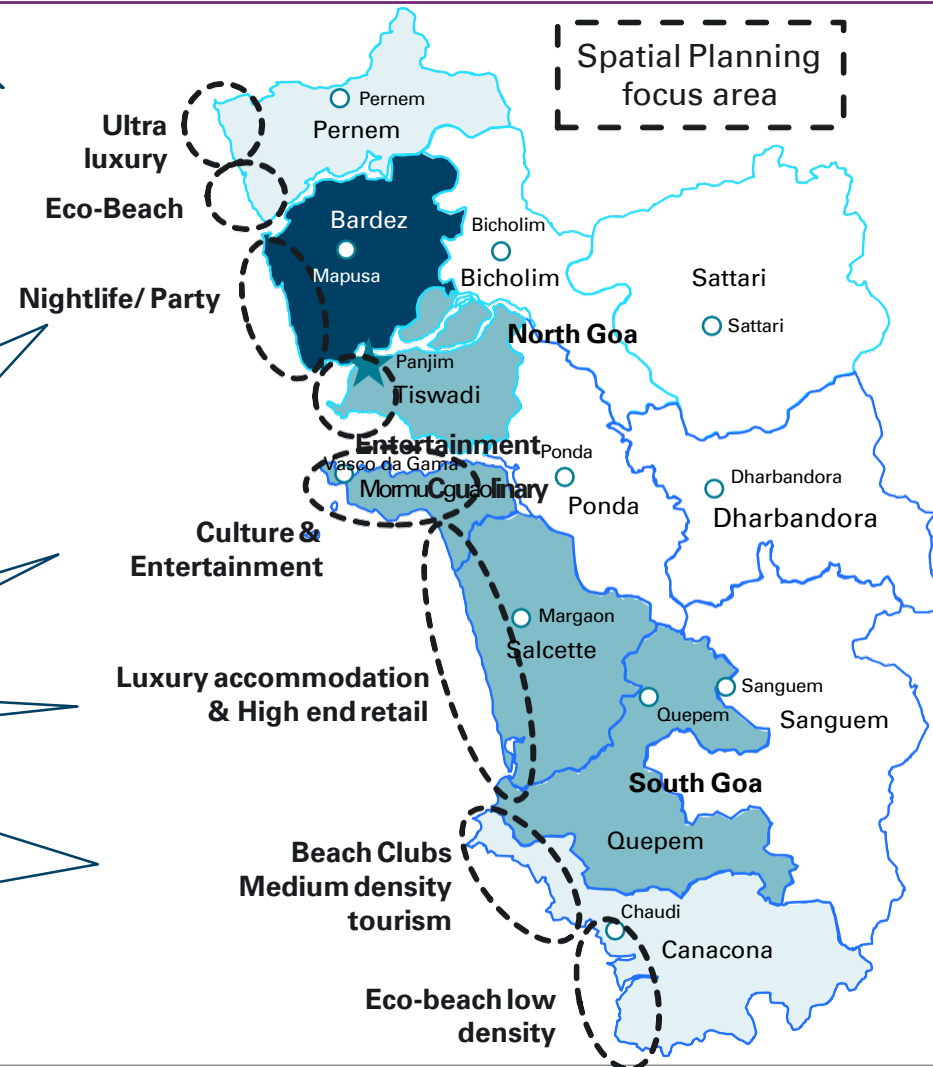
“Marine nature and life parks” - Partially preserved beaches to offer an adapted environment for flora and fauna (terrestrial and marine).

- **“Big club” resorts**
- **New generation campsites**
- **Beach Clubs**
- Quality programmes to manage pollution levels, cleanliness and sanitation and definition of swim zones

Festivals/ beach events

Low density resorts

Integrated leisure destinations –
Beach access/ security/ cleaning/ quality of sea water/ toilets/ parking/ creation of jetties/ square with F&B facilities/ small markets/ watersports facilities including schools (sailing, surf, board) in some cases as part of an integrated project to welcome tourists



Territorial vision

- Mass tourism development
- Low- Medium tourism development
- Very Low density development & Protected Areas

Specific development guidelines for the Hinterlands: Nature-Based tourism

Low density tourism development & protected areas:

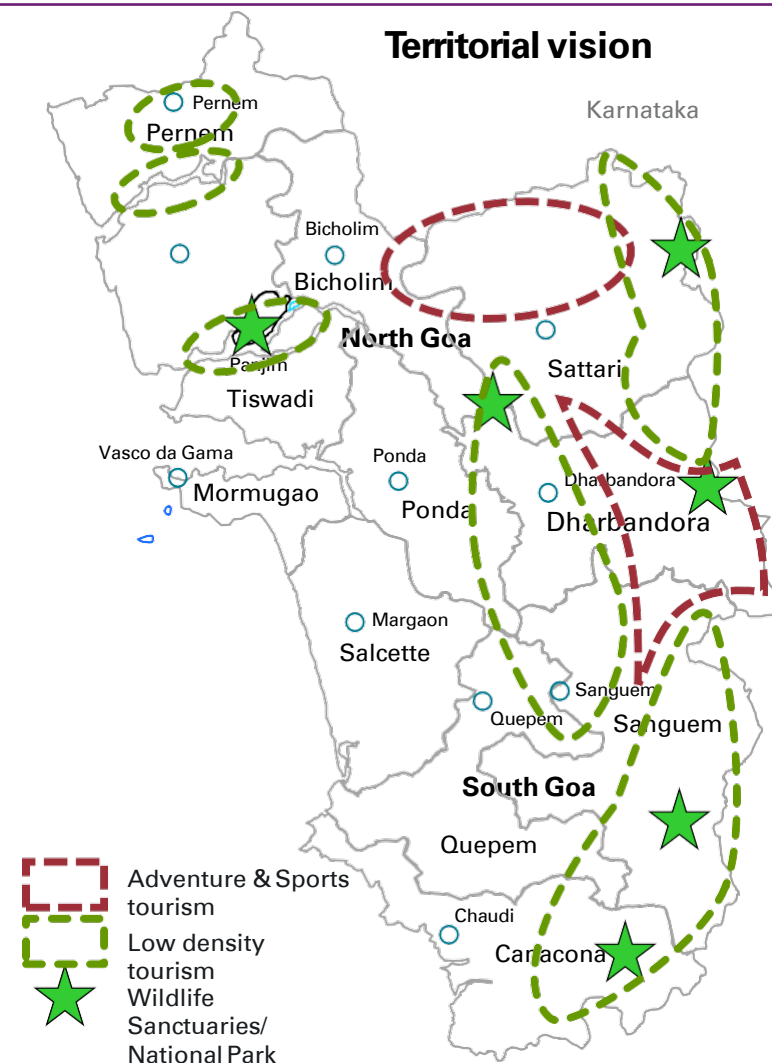
- **Hinterland areas - special interest and preserved / protected** from mass tourism flows and developments.
- Attractions - local flora / fauna, a proper botanic garden, new protected areas and special interest zones, marked trekking trails
- **Low density tourism eco-lodges** with an orientation towards environmental and social promotion.
- **Agri tourism** can also be promoted central areas of the state.
- **Homestays** meshing culture with tourism

Adventure & Sports tourism:

- Tourism activities and experiences which might cause greater territorial impact, proposed in areas with lower environmental value.
- **Improve existing experiences** by upgrading products, facilities and infrastructure.

Nature and Waterways 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.



Specific development guidelines for the Hinterlands: Nature-Based tourism

Character images to illustate density development

- Low density tourism development & Protected areas
- Adventure & Sports tourism



- High end nature tourism



Specific development guidelines for the Hinterlands: Culture-Based Tourism

Tourist activities with spatial map for Goa

Routes and Circuits

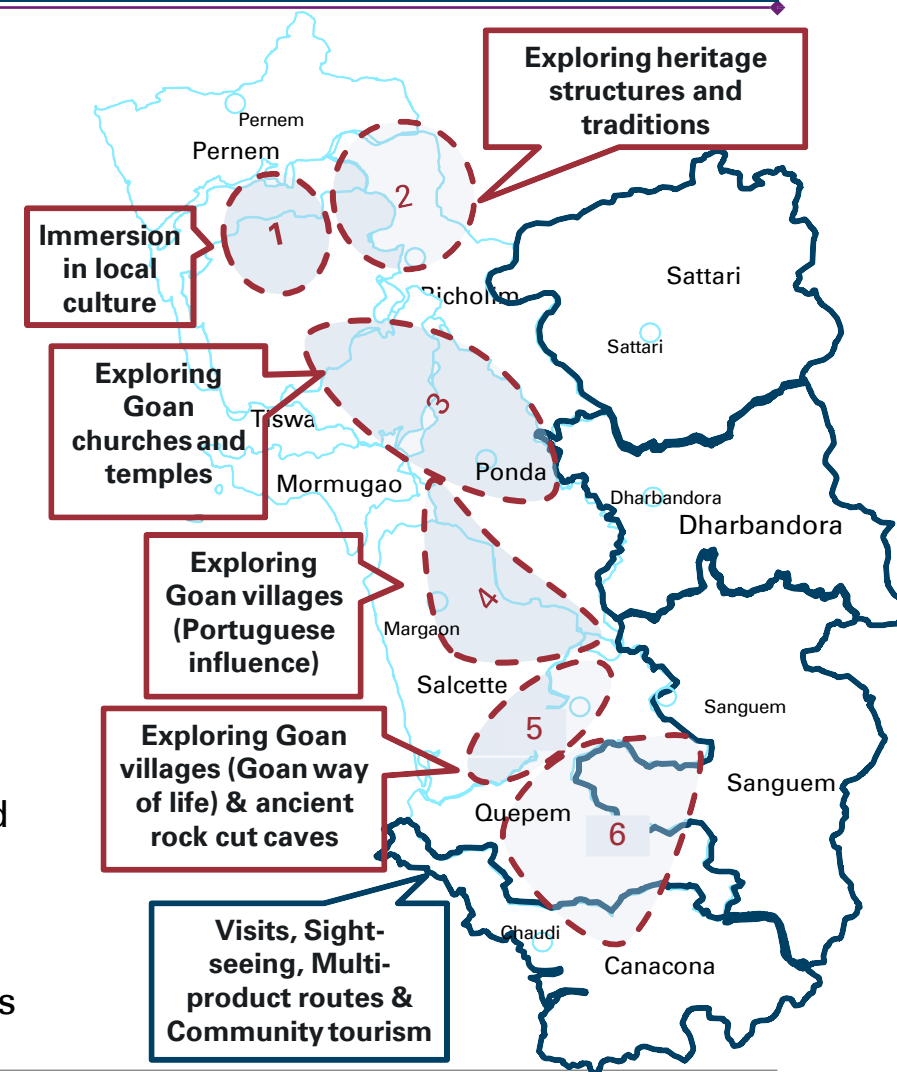
- Key heritage / cultural and pilgrimage tourism assets appear to be concentrated around the central region of Goa, particularly in Bardez, Tiswadi, Ponda, Mormugao and Salcette talukas.
- Different routes / circuits need to be created showcasing tourism assets across these talukas.

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



Hotel strategy - Standards and classifications

High service disparities in accommodation infrastructure

- Serviceability levels among accommodation options within the same star/ DoT hotel categories
- Traveler expectations and actual services offered, especially in bookings made through online media
- Basic traveler requirements not serviced at lower category establishments

Key solutions proposed

- Re-establishing standards for each classification (e.g. A, B, C, D and Heritage) in order to make them relatable to globally recognized classification standards (e.g. European Hotelstars Union, World Hotel Rating, AAA Diamond Ratings or Forbes Travel Guide ratings)
- Ensuring an enforcement mechanism for adherence to required service standards
- Voluntary special labels

Benefits of re-establishing standards and monitoring

- Higher customer satisfaction, promoting repeat visits and positive word of mouth dissemination in the industry
- Higher value realization for travelers at accommodation establishments
e.g. At Santa Susana- key destination of Costa de Barcelona, especially for European families, the accommodation offer is mainly comprised by quality hotels of 3/ 4 stars (built before 2000). However the opening of two 5-star type hotels in the last three years encouraged surrounding establishments to upgrade and renew their offer.



Accommodation Strategy: Diversification of the tourism experience

Accommodation typologies applicable to Goa's Tourism Value Proposition

Hotel

- >200 keys
- Rooms and suites
- Provides a focused experience around one signature amenity or anchor attribute
- Beach club as a potential facility



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 and medium density developments

- <100 keys on the coast
- Up to 50 keys in the hinterlands
- Rooms, suites and villas
- Boutique hotels
- Located in special interest and preserved / protected areas
- Nature and culture activities
- Sustainability focus



Other Accommodation

- Surf camps
- Camp sites
- Vacation cities
- Beachside huts
- Homestays
- Heritage Accommodation
- Low impact accommodation



Examples of land requirements according to the zoning in the Regional Plan applied to accommodation



Luxury Eco-Resort

Luxury Eco-Resort (30 Suites + 20 Branded Villas)

PROPOSED PROJECT/ PROGRAM

- Total rooms: 50
- Area/ Room Ratio: 180 sqm
- Total Built Up Area: 9,000 sqm

LAND REQUIRED ACCORDING TO ZONING

- VP 1: 15,000 sqm (FAR 60%)
- VP 2: 18,000 sqm (FAR 50%)



4-Star Eco-lodge

4-Star Eco-Lodge (40 Rooms + 20 Cabañas)

PROPOSED PROJECT/ PROGRAM

- Total rooms: 60
- Area/ Room Ratio: 120 sqm
- Total Built Up Area: 7,200 sqm

LAND REQUIRED ACCORDING TO ZONING

- VP 1: 12,000 sqm (FAR 60%)
- VP 2: 14,400 sqm (FAR 50%)



Illustrative

Eco-Cottage & Tented Camps

Eco-Cottage & Camps (20 Cottages + 40 Tented Camps)

PROPOSED PROJECT/ PROGRAM

- Total rooms: 60
- Area/ Room Ratio: 90 sqm
- Total Built Up Area: 5,400 sqm

LAND REQUIRED ACCORDING TO ZONING

- VP 1: 9,000 sqm (FAR 60%)
- VP 2: 10,800 sqm (FAR 50%)

2.

Core tourism Infrastructure

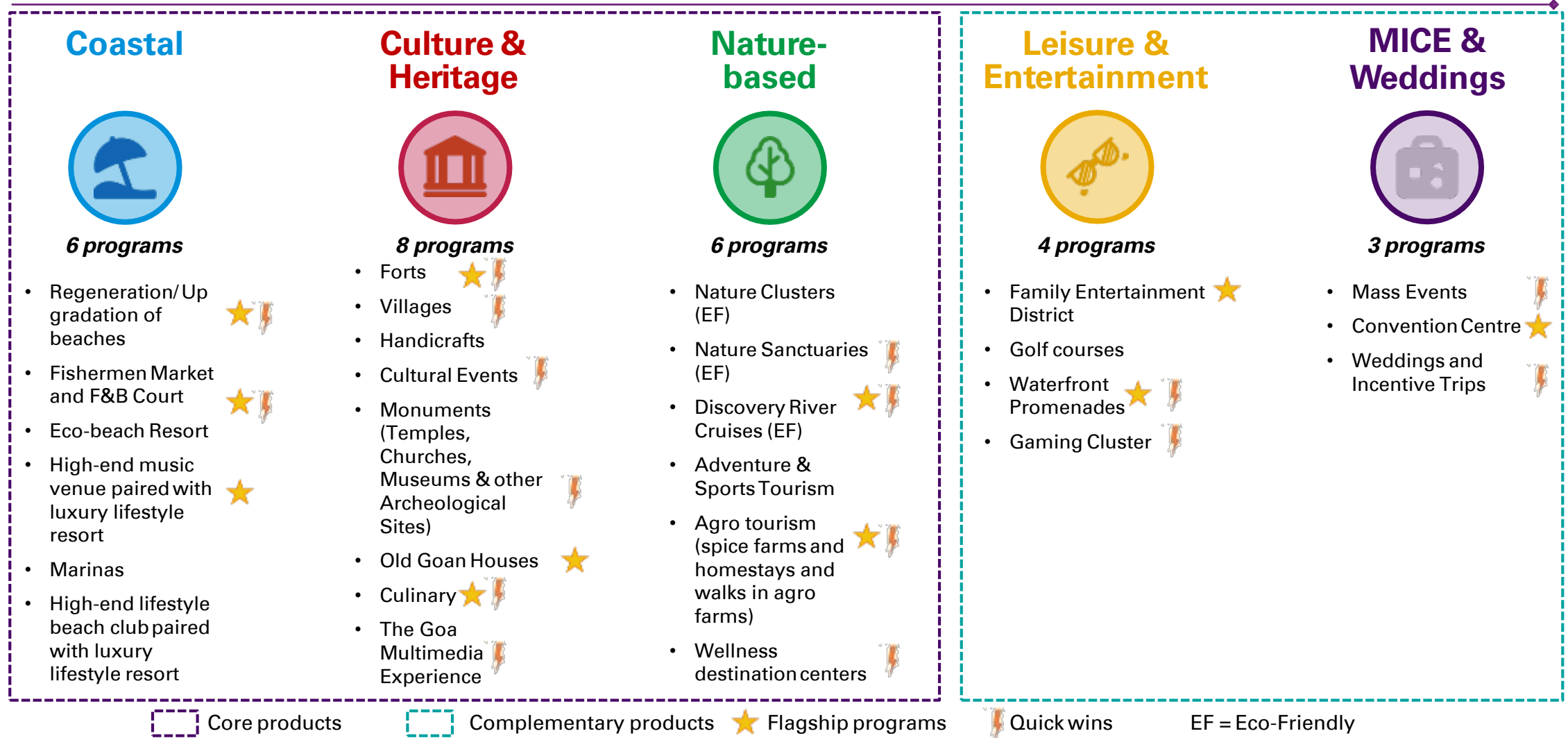
Tourism programs

Investment and funding analysis

Phasing

Tourism circuits

27 programs have been defined to develop the Master plan



Understanding the programs' structure

Process: In order to develop each of the core and complementary tourism products determined in Module 2, 27 specific programs have been identified in order to support them.

These programs are of different nature:

- **Scope:** Short or broad
- **Investment:** requesting potentially low or high investment
- Flagship and quick win qualifications for some of the programs



Flagship Programs

- Identified as such because of the potential for a high impact on the new vision for Goa tourism in terms of differentiated positioning, product diversification, product improvement and for the achievement of the attraction of higher spending tourists.
- **11 flagship programs have been identified (around 40% of the programs)**
- As shown in the scheme presented in the former slide, there is at least one flagship program for each main tourism product category.



Quick Wins

- Identified as such because their implementation timeframe is estimated to be up to 3 years and they can be showcased immediately based on changes in Goa tourism through implementation of the Master Plan.
- This will encourage the local stakeholders to undertake other programs and initiatives as they will see tangible results.
- **There are 16 quick win programs (almost 60% of all the programs)**
- As shown in the scheme presented in the former slide, there are at least 2 quick win programs for each main tourism product category.

Coastal Tourism Programs

★ Flagship programs ⚡ Quick Wins



- | | | | |
|---|--|-----|--------------|
| 1 | Regeneration/ Up gradation of Beaches
<i>Across Goan beaches. Pilot Projects – N. Goa: Calangute, Candolim, Baga, Arambol.
 S. Goa: Colva, Palolem</i> | ★ ⚡ | Spain |
| 2 | Fishermen Market and F&B Court
<i>Brittona, Chapora Bay, Siridao and Mobor</i> | ★ ⚡ | Borneo |
| 3 | High-end music venue paired with luxury lifestyle resort
<i>At a suitable location in Baga, Calangute or Candolim</i> | ★ | Ibiza |
| 4 | High-end lifestyle beach club paired with luxury lifestyle resort
<i>At a suitable location in Arambol, Vagator or Anjuna; and Cavelossim or Palolem</i> | | Singapore |
| 5 | Eco-beach (Resort)
<i>Pure Eco-beach: Galgibag, Morjim turtle stretch/ bird watching and Talpona. Resort: Agonda, Patnem, Palolem (part), Morjim, Mandrem and Querim</i> | | Bali |
| 6 | Marinas
<i>Nauxi, Chicalim and Brittona; Further south e.g.: Assolna</i> | | South Africa |



Regeneration/ Upgrading of beaches

Product: Coastal tourism	
Flagship program	Quick wins
✓	✓
Timeframe: Short term	
Concept and objectives	<ul style="list-style-type: none"> Coastal tourism is “THE” tourism product Goa is famed for; however, efforts need to be taken to upgrade/ organize the existing product and enhance the tourist experience in an increasingly competitive global coastal tourism scenario. Goa needs to improve its basic infrastructures, particularly in the most developed coastal areas to support the sustainable development of tourism growth. It is envisaged that the overall quality of the existing infrastructure is improved to bring it on par with best in class products, with special emphasis laid on innovation, quality, safety and security.
Accommodation needs	<ul style="list-style-type: none"> The inclusion of high-end music venues or high-end lifestyle beach clubs combined with luxury lifestyle resorts (Ushuaia and Nikki Beach concepts respectively) can raise the quality level in the area and bring other synergies
Market strategy	<ul style="list-style-type: none"> Tourists (domestic and foreign) and residents Day and overnight visitors (including day cruise visitors)

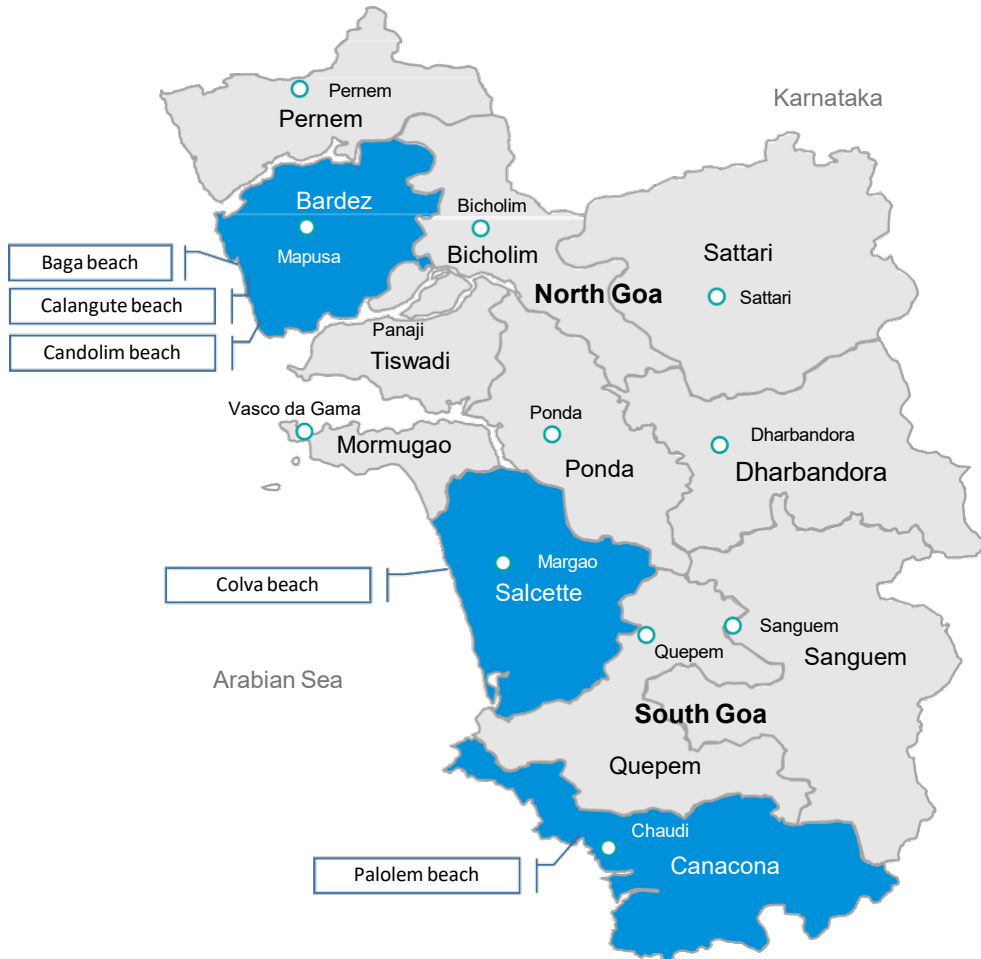
Commercial strategy	<ul style="list-style-type: none"> Beaches along the coast of Goa will provide its resident population, the tourism industry and tourists with basic services that cater for their needs and requirements.
Implementation strategy	<ul style="list-style-type: none"> Launch either Calangute Beach to the north or Colva beach in the south as pilot phase to showcase results and create awareness. The program will implement good practice in these processes and replicate the experience in other beaches.

Key issues to be addressed

- Infrastructure improvements envisaged – beach access, cleaning, maintenance, water, electricity, sewerage, parking**
- Regulation, relocation from the beach and upgrade of shacks/ and retail shops.
- Quality labels should be implemented to guarantee a best in class experience to visitors, encouraging repeat visits.
- Misbehaviour from tourists and retail owners: lack of cleanliness at all beaches, and also, high levels of alcohol and drug abuse on certain beaches



Raising the quality, safety and sanitation level of the most popular beaches in Goa



Potential locations	Facilities and land requirements
All beaches along the coast and selection of pilot projects in N. Goa: Calangute, Candolim and Baga. S. Goa: Colva and Palolem	N/A
Description and tasks	
<ul style="list-style-type: none">• Improve access: restrain volume of vehicles with direct beach access; improve urban landscape to access the area; reorganize retail where invading roads and sidewalks.• Improve parking: create large parking spaces away from the beach and tourist bus/train transportation to the beach; parking near the beach should be charged for (at a reasonably high rate) with parking agents to control traffic and payment. Limit access to these nearby parking areas when full.• Improve urban sidewalks within the main areas: pedestrian walkways clearly separated from car and motorcycle traffic; create biking routes.• Improve shacks: Taking into consideration recommendations of GCZMA study and NGT approval. Give quality labels to best shacks and special Goan cuisine label for those who would like to apply and meet standards.• Improve the beach itself: public showers; watching towers and rescue team; separate bathing areas from watersport areas; daily beach cleaning; etc.• Improve retail offer: reorganize retail space and create clusters of retail paired to shacks clusters or adjacent. Encourage special labels for Goan handicraft.• As a result of the above measures, a paved promenade free of commercial outlets should be created to separate the beach itself from the shacks and retail.	

Summary of strategy

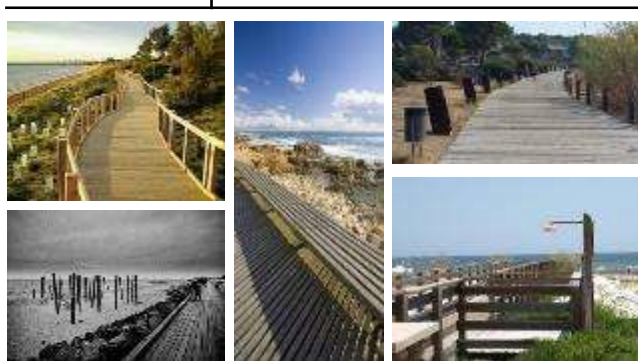


Regeneration/ Up gradation of beaches			
Pedestrian and non-motorized access	Vehicular access & parking areas	Shacks	Beach facilities & equipment
<ul style="list-style-type: none"> <input type="checkbox"/> Promenade along the beach front <input type="checkbox"/> Comfortable, safe and efficient pedestrian network with wide sidewalks to access the beach promenade <input type="checkbox"/> Encourage biking by providing bike paths <input type="checkbox"/> Proper access to the beach <input type="checkbox"/> Provision of large open public spaces along the promenade. These will work as “Gathering Places” facilitating social contact and communication, including cultural and commercial activities <input type="checkbox"/> Barrier free access for specially abled persons 	<ul style="list-style-type: none"> <input type="checkbox"/> The road running parallel to the promenade (sea front) is blocked off from all traffic <input type="checkbox"/> Parking closest to the beach should be the most expensive <input type="checkbox"/> More parking options are available in the surroundings <input type="checkbox"/> Free shuttle bus services available connecting parking to the beach 	<ul style="list-style-type: none"> <input type="checkbox"/> Shacks set up on the edge of the beach under specific standards and granted as a special license as per the shack policy <input type="checkbox"/> Shacks set up at intervals from each other as specified in the shack policy <input type="checkbox"/> Main concentration of eateries should not be directly on the beach, but behind the road running parallel to the promenade and along the streets converging on the beach subject to land availability <input type="checkbox"/> Give quality labels to best shacks and special Goan cuisine label for those who would like to apply and meet standards 	<ul style="list-style-type: none"> <input type="checkbox"/> Sitting areas <input type="checkbox"/> Showers <input type="checkbox"/> Changing rooms <input type="checkbox"/> Playgrounds for kids <input type="checkbox"/> Parking for bicycles <input type="checkbox"/> Signage illustrating advanced quality and environmental beach management <input type="checkbox"/> Demarcation of swimming, water sports and no swim zones along the beach <input type="checkbox"/> First aid facilities
Transversal strategies <ul style="list-style-type: none"> <input type="checkbox"/> Safety: increasing the number of local policemen and building a network video surveillance system with network cameras <input type="checkbox"/> Solid waste management: developing a proper network of collection and disposal of solid waste <input type="checkbox"/> The ultimate goal of the Regeneration/ Up gradation of beaches program is to impact on human behaviour through the built environment. It is expected that the improvement on the overall state of beaches will help reducing misbehaviour from tourists and retail owners, lack of cleanliness, noise, and the high levels of alcohol and drug abuse. 			

Regeneration/ Up gradation of beaches - example of the different sections that could be found on beaches depending on their degree of urbanization



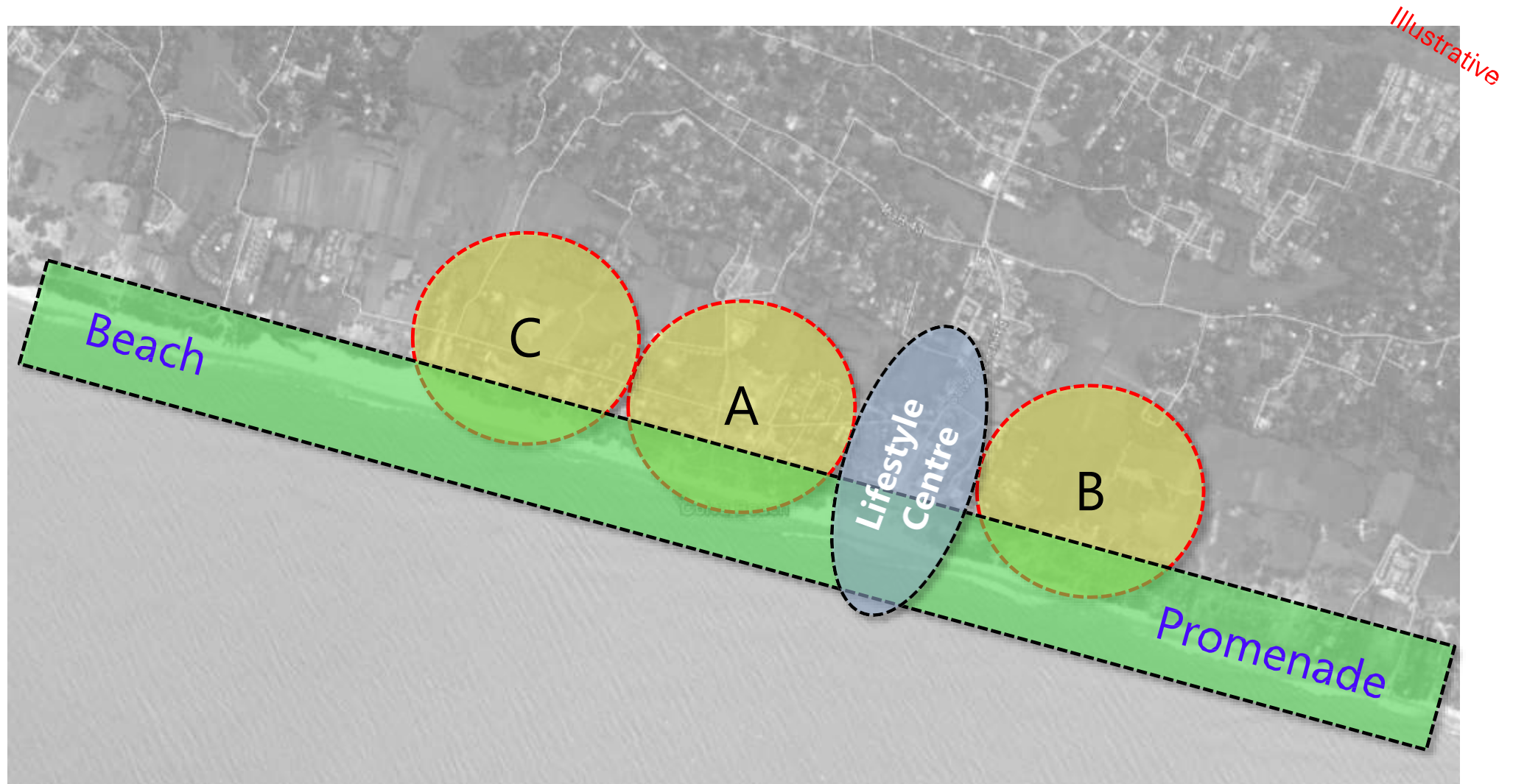
Illustrative



Colva Beach used as example



Regeneration/ Up gradation of beaches - conceptual example of zones



Colva Beach used as example

Shacks



Illustrative



Give quality labels to best shacks and special Goan cuisine label for those who would like to apply and meet standards

Shacks at sufficient intervals on the edge of the beach, under specific standards and granted as a special license

Main concentration of eateries should not be directly on the beach, but behind the road running parallel to the promenade and along the streets converging on the beach subject to land availability



Beach facilities & equipment



Solid waste management



Changing rooms



Illustrative

Information panels

Signage illustrating advanced quality and environmental beach management

Surveillance systems



Sitting areas



Urbanized beaches - assumptions applied in estimating the construction costs for the Program



Cost concept	1 kilometre of Promenade along urbanized beaches
Total cost	INR 5.56 cr
Facilities	<ul style="list-style-type: none"> Promenade (equipped with bike lane, lighting, shaded areas, sitting areas, surveillance systems, waste-paper bins and walking paths to access the beach) Beach Life square (large open public space of around 500 square metres) Parking (200 paved parking lots) Public shacks set up under guidelines provided in the shack policy Beach facilities (solid waste management, showers, toilets, changing rooms, information panels and signage illustrating advanced quality and environmental beach management)



Illustrative



Non-urbanized (natural) beaches - assumptions applied in estimating the construction costs for the Program



Illustrative

Cost concept	1 kilometre of Promenade along non-urbanized (natural) beaches
Total cost	INR 2.78 cr
Facilities	<ul style="list-style-type: none"> Promenade (light and eco-friendly structure equipped with sitting areas, waste-paper bins and walking paths to access the beach) In order to protect marine life and biodiversity, some natural beaches should not be equipped with lighting systems and illumination during the night Parking (100 parking lots) Beach facilities (solid waste management, showers, toilets, information panels and signage illustrating advanced quality and environmental beach management)



Benchmark and character images



"Best Practices"

- Playa de Palma
- Blue Flag voluntary label (www.blueflag.org)
- Nautical Stations in Spain (www.estacionesnauticas.info)
- Bali: Focus on cleanliness, access and public utilities. To control tourist flow, wall has been developed parallel to main beaches with convenient entry points. Roads are lined with pedestrian walkways which offer a view of the beach. To decongest the traffic near beaches, many roads have a one way access.
- Salou and Cambrils Municipalities, Spain- Since the 19th century, Salou has been a leading tourist destination in Europe, its slogan is "Salou Europe's beach." Quality, excellence and respect for the environment are the standards used when working on the Salou coast. All of the municipality's beaches have been awarded ISO 14001 Environmental Certification. Salou and Cambrils are working together with two more neighbouring municipalities in order to achieve its main goal today: reduction in seasonality. With a large leisure offering (which includes Port Aventura World) they have become a reference of family and sports tourist destinations.





Fishermen market and F&B court

Product: Coastal tourism	
Flagship program	Quick wins
✓	✓
Timeframe: Short term (pilot project) and medium term (all concerned beaches)	
Concept and objectives	<ul style="list-style-type: none">• Its main objective is the promotion of Goa's authentic cuisine, particularly along the coastal fringe.• It is conceived as a public space where a large number of people can come together. The concept is based on a combination of elements such as the fishing port, a fish market and a food court (specialised in seafood).• The food court consists of a large number of food outlets arranged around a central area with tables.
Accommodation needs	<ul style="list-style-type: none">• Not linked to a specific accommodation offering
Market strategy	<ul style="list-style-type: none">• Mostly tourists (domestic and foreign) although it is also an attractive place for the resident population
Commercial strategy	<ul style="list-style-type: none">• This space is a shop window which puts the authentic cuisine of Goa on display. Its installations are comfortable, comfortable and hygienic. It includes a Premium offering and high standards of quality and service. But it does not aim to be a luxury place. Nor a cheap place

Implementation strategy

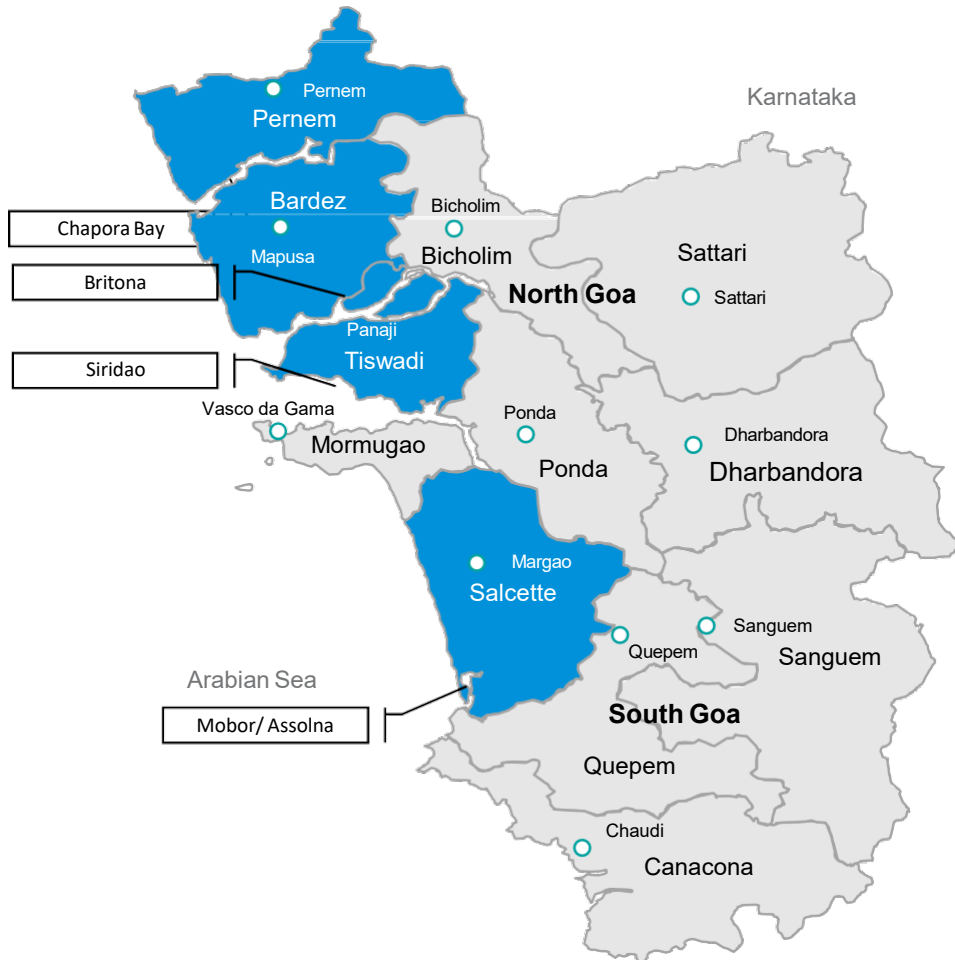
- Selection of a coastal village recognised particularly for its fishing activity, for the pilot project. Given that the project will revolve around the fishing port, this port should have the potential for expansion of and addition to its fish market and restaurant area.
- In a second phase, the project should be replicated in other villages (traditional fishing villages or others of interest) along the length of the coast. There should be one each on the northern and southern coast .

Key issues to be addressed

- Identification of at least 2 fishermen ports / markets where the product could be developed: at least one in the South and one in the North of Goa
- Ensure participation of local stakeholders: fishermen, fish market sales shops and food & beverage entrepreneurs, which could be already established ones, willing to replicate their experience in a new location.
- Ensure that Goan cuisine is featured in the product and that good quality is provided in terms of food products, food stands and culinary preparation, cleanliness and maintenance



Goa's number one source of premium fresh seafood and local cuisine



Potential locations	Facilities and land requirements
Britona, Chapora Bay, Siridao and Mobor/ Assolna	Fishermen port and market (adjacent or nearby); Food & beverage court space (at least 1,000 sq.m.)
Description and tasks	

- Identification of the fishing port/ village for carrying out of the pilot test
- **Location:** The final location has to be well thought out after a thorough study of the terrain, avoiding any damage to existing local and fishing activities.
- Identification and selection of gastronomic offering, which needs to be aligned with the programme to promote the traditional cuisine of Goa throughout the state.
- Make agreements with all interested stakeholders and agree on space & program
- Implementation e.g. Turisme Pesquer activity is a more relaxing alternative to an active fishing tour. It involves departing from the port of Cambrils in a pleasure boat, and sailing to where the fishermen work and cast their trawl nets. From there, they explain the different kinds of fishing tackle and the treasures of the Mediterranean Sea. Then the traveler is taken to a seaside restaurant to enjoy the delights of Cambrils' seafood restaurants, and dishes such as the "ranxo mariner" (sailor's fare)
- Ensure that minimum space is available and design the concept with 2 main options:
 - Popular and informal Food Court: one shared public dining room with F&B stands around
 - Cluster of specialised fish and shellfish restaurants and/ or shacks with different sizes and culinary levels
- Certification and quality labels

Benchmark and character images



"Best Practices"

- Borneo: Kuching's 'Top Spot' food court
- Lei Yue Mun Fish Market & Restaurant, Hong Kong
- Fisherman's wharf San Francisco
- Cambrils, Catalonia is a traditional fishing town famous for its large number of high-quality seafood restaurants, traditional recipes and good gastronomy in general. Fishermen play a key role both at sea and on land





High-end music venue paired with luxury lifestyle resort

Product: Coastal tourism	
Flagship program	Quick wins
✓	
Timeframe: medium term	
Concept and objectives	<ul style="list-style-type: none">• This is a new resort concept in which accommodation and entertainment are mixed. The resort is built around a large central courtyard that includes pools, bars and a stage for events. The resort hosts events in this central space and the room tariff includes entry to these events.• The programme forms part of the set of measures to enhance the existing product along the coastal fringe. It will make it possible attract higher-spending domestic and international tourists and improve their experience.
Accommodation needs	<ul style="list-style-type: none">• The development includes accommodation units in luxury category. It may influence a modernisation of the accommodation supply in the area and even generate this new offering.
Commercial strategy	<ul style="list-style-type: none">• High-end music venue (featuring the most renown national and international DJ's music) paired with luxury lifestyle resort. The music venue is addressed to both resort guests and external visitors.

Market strategy

- Aimed at domestic and international tourists and visitors

Implementation strategy

- The programme will be put into practice in one of the most developed and popular beaches in Goa's northern area, currently dominated by mass tourism. Once the beach is selected, the most appropriate location must be found.
- It is a single project, not to be duplicated in different locations/ beaches.

Key issues to be addressed

- Selection of the most suitable beach to locate the project. It is expected that this kind of products will increase quality levels in adjacent areas. Other resorts/ events locations, either existing or future, will try to improve their standards to provide the same quality level.
- Once the beach is selected, the precise location must be studied in detail as well as the size of the site needed
- Take into account conditions of access (both pedestrian and vehicular) and the parking supply
- Take into account the conditions of cleanliness, lighting and security in the vicinity of the club
- Selection of operator / brand

Envisioned to be one of the most exclusive and biggest clubs in India



Potential locations	Facilities and land requirements
At a suitable location in Baga, Calangute or Candolim	3 to 4 Ha

Description and tasks
<ul style="list-style-type: none"> Identify potential high end operators – preferably international brands – for this development Identify potential investors for this project In general, improvements should be made in infrastructures (access to and from nearby beaches, parking, cleaning, maintenance, water, electricity, sewage, shops selling souvenirs, safety and security in general, etc.). Creation of a calendar of events and concerts presentations, including names of the artists and celebrities who will attend. Include the dates in a Goa events calendar Public sector to facilitate the whole process

Benchmark and character images



"Best Practices"

- Ibiza Rocks Hotel
- Ushuaia Ibiza Beach Hotel





High-end lifestyle beach club paired with luxury lifestyle resort

Product: Coastal tourism	
Flagship program	Quick wins
Timeframe: medium term	
Concept and objectives	<ul style="list-style-type: none">• Modern luxury beach club concept that combines the elements of music, dining, entertainment, fashion, film, and art into one.• It is located right on the shore front with direct access to the beach and sea views. It includes swimming pools and areas for rest and relaxation. There are usually several restaurant options (indoor and outdoor) as well as bars.• The objective is to attract higher-spending domestic and international tourists and improve their experience.
Accommodation needs	<ul style="list-style-type: none">• The development would include luxury-category accommodation units. To match its concept, it should be located close to a concentration of 5-star hotels and resorts.
Market strategy	<ul style="list-style-type: none">• Tourists (domestic and foreign) and resident population• Day and overnight visitors (including day cruise visitors)

Commercial strategy

- High-end lifestyle beach club featuring a blend of music, art and fashion with day and night atmosphere paired with luxury lifestyle resort (or not). The beach club is addressed to both resort guests and external visitors

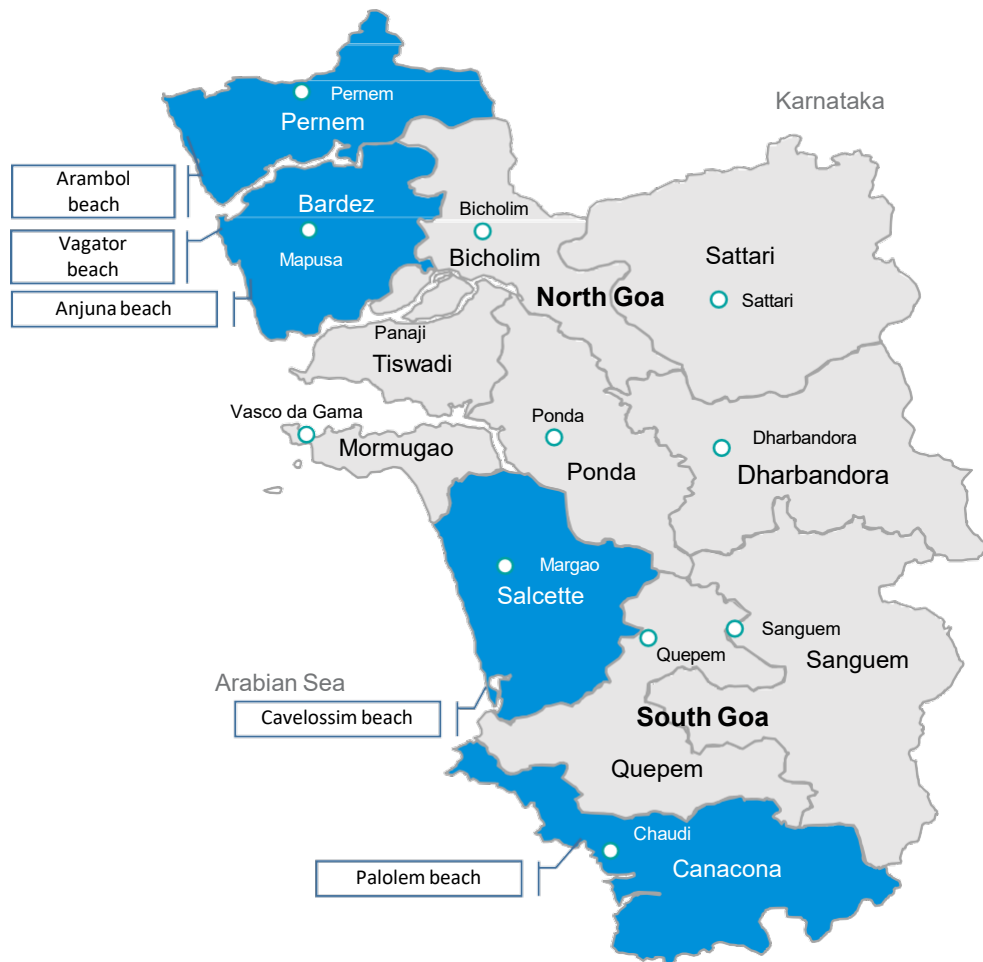
Implementation strategy

- Around 5 beaches have been identified in the southern area with potential to accommodate this project (this is where higher end hotels and more exclusive beaches are located). Once the beach is selected, the most appropriate location must be found.
- It is a single project, not to be duplicated in different locations/ beaches.

Key issues to be addressed

- Selection of the most suitable beach to locate the project. It is expected that this kind of product will help to increase the competitiveness of the destination. Other existing or future resorts/ beach clubs will try to improve their standards to provide the same quality level.
- Most suitable location and site necessary for the development.
- Improve access conditions (both pedestrian and vehicular) and the parking supply.
- Improve the conditions of cleanliness, lighting and security in the vicinity of the beach club.
- Selection of operator / brand

Featuring a blend of music, art and fashion with day and night atmosphere



Potential locations	Facilities and land requirements
At a suitable location in Arambol, Vagator or Anjuna; and Cavelossim or Palolem	0.5 to 2 Ha
Description and tasks	
<ul style="list-style-type: none"> Identify potential high end operators – preferably international brands – for this development Identify potential investors for this project In general, improvements should be made in infrastructures (access to and from nearby beaches, parking, cleaning, maintenance, water, electricity, sewage, shops selling souvenirs, safety and security in general, etc.). Creation of a calendar of events and concerts presentations, including names of the artists and celebrities who will attend. Include the dates in a Goa events calendar Public sector to facilitate the whole process 	

Benchmark and character images



"Best Practices"

- Nikki Beach
- Mambo Beach Club, Singapore
- Café Delmar, Ibiza
- Development of Nusa Dua as a premium resort area has helped in changing the tourist profile at the specific location. New areas are now being developed with the long term plans of achieving a balanced growth across the island.



Eco-beach resort



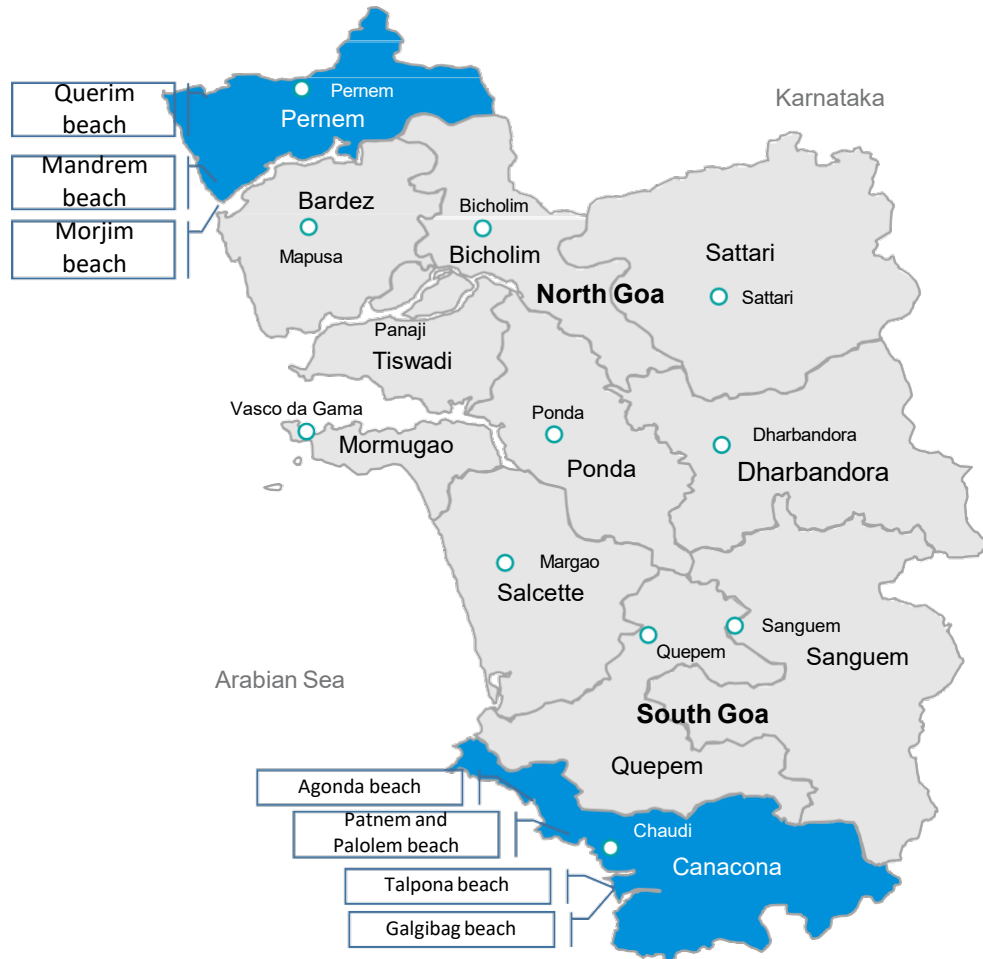
Product: Coastal tourism	
Flagship program	Quick wins
Timeframe: medium term	
Concept and objectives	<ul style="list-style-type: none"> Eco-beach resorts are low density developments (small sized tourist accommodation structure) often located in special interest and preserved/ protected areas – they contribute to the protection of the fragile neighbouring zones. Eco-beach resorts are planned, designed, built and exploited in accordance with responsible environmental and social principles. Prove to be suitable for a spiritual communion between nature and culture.
Accommodation needs	<ul style="list-style-type: none"> The development already includes accommodation units
Commercial strategy	<ul style="list-style-type: none"> Eco-beach resorts offer tourists the opportunity for an interactive experience (turtle nesting, bird watching, trekking, etc.) while preserving fragile neighbouring zones and involving the local communities on the coast and also in the nearby hinterland to showcase both culture and nature, as eco-beach tourists are also interested other local experiences.

Market strategy	<ul style="list-style-type: none"> Domestic and foreign tourists
Implementation strategy	<ul style="list-style-type: none"> Launch either Galgibag beach or Talpona beach to the south as a pilot project to showcase results and create awareness. The program will implement good practices in this process and stakeholders will be able to replicate the experience in other beaches.

Key issues to be addressed

- There are some beaches that need to be protected from any kind of construction. These zones should be given the status and format of “Marine Nature & Life Parks”
- Eco-beach resorts should include an environmental and social programme in their development
- Low density branded resorts for the high-end market should be promoted (brands such as Banyan Tree, Six Senses, The Oberoi, Como Hotels, etc.)
- Develop eco-tourism standards, which could be totally or mainly inspired in already existing green eco-label
- Green certifications and quality labels for activities/ experiences

Built in harmony with nature and hence with minor impact on environment



Potential locations	Facilities and land requirements
Pure Eco-beach: Galgibag, Morjim turtle stretch and Talpona. Eco-beach resort: Agonda, Patnem, Palolem (part), Morjim, Mandrem and Querim	1.5 to 3 Ha

Description and tasks
<ul style="list-style-type: none"> Promote the emergence of eco-beach resorts in those pristine beaches which are recognized as of special interest and might be subject to high pressure in terms of possible mass tourism developments. Still, some beaches should be partially preserved to offer an adapted environment for nature and wildlife (sea turtle nesting, dolphins, marine life, etc.). Accessibility should be improved in terms of upgrading existing roads instead of building new ones. Eco-beach resorts should develop and promote nature-based activities such as walking, cycling, horseback, exploring the local fauna, flora, bird and insect life around. Some developments might include organic gardens to supply their restaurants and tourists could even participate in cooking sessions. Develop Protection and Interpretation Centres and offer learning-by-doing activities (edutainment) with local communities Relaxation and recovery activities such as spa treatments & massages, meditation, yoga

Benchmark and character images



"Best Practices"

- Banyan Tree
- The Oberoi
- Six Senses





Understanding the eco-resort concept

Eco-beach Resort	
What is an Eco-Resort exactly?	Some examples of activities offered
<ul style="list-style-type: none"> ❑ Low density developments (small sized tourist accommodation structure) ❑ Often located in special interest and preserved / protected areas (they contribute to the protection of the fragile neighbouring zones) ❑ Built in harmony with nature and hence with minor impact on environment ❑ Involves the local communities and allows them to generate benefits ❑ Financially sustainable ❑ Offers tourists the opportunity for an interactive experience and proves to be suitable for a spiritual communion between nature and culture ❑ Eco-Resorts are planned, designed, built and exploited in accordance with responsible environmental and social principles 	<ul style="list-style-type: none"> ❑ Nature-based activities ❑ Walking, cycling, horseback and camel rides ❑ Exploring the local fauna, flora, bird and insect life around ❑ Agro-tourism ❑ Some establishments include organic gardens to supply their restaurants and tourists can even participate in cooking sessions ❑ Protection and Interpretation Centres ❑ Learning-by-doing activities (Edutainment) with local communities ❑ Rural and community activities based on traditional and local products ❑ Relaxation and recovery activities such as Spa treatments & massages, meditation, yoga ❑ Incentives, team-building activities
<ul style="list-style-type: none"> ❑ Water and energy consumption: steps to reduce its carbon footprint must be taken to avoid impacts on the surroundings ❑ Solid waste management: developing a proper network of collection and disposal of solid waste. 	



Understanding the eco-resort concept



As mentioned before, Eco-beach resorts will be located in special interest and/or preserved/protected areas as they contribute to the protection of the fragile neighbouring zones. The use and management of the surrounding areas might be done under the 'Eco Nature Park' approach.

Eco Nature Park

The Eco Nature Park is open to the guests and offers the possibility to discover the local fauna and flora. The park has a scientific and educational purpose, offering to biologists and volunteers an area of study of this eco-system and offering to the public an entertaining way to discover the fauna and flora of the eco-system. Visitors are able to walk through the park on wood board trails and marked trails. These trails are punctuated by information board that describe the ecosystem of the park.

Trekking, bird watching, diving and other nature activities can be organized.

Illustrative conceptual example





Product: Coastal tourism	
Flagship program	Quick wins
Timeframe: long term	
Concept and objectives	<ul style="list-style-type: none"> The program involves the creation of marinas, ports and/ or shelters for boats as central element of large mixed-use developments including components of retail, residential, hotel and entertainment. It is aimed primarily at the nautical tourism market, although its modern approach, with extensive leisure facilities and entertainment, make it attractive to both locals and visitors. At least one marina needs to be developed so as to raise the quality and the standard to the tourists visiting Goa.
Accommodation needs	<ul style="list-style-type: none"> Might include one or two hotels with views over the marina
Market strategy	<ul style="list-style-type: none"> Intended primarily for the nautical tourism market Day and overnight visitors (including day cruise visitors) Locals and tourists
Commercial strategy	<ul style="list-style-type: none"> Benefiting from a unique seafront location, the marina is a vibrant new retail, leisure and entertainment hub for the city. Offering accommodation for tourists and quality living for local residents

Implementation strategy

- At least one marina needs to be developed so as to raise the quality and the standards
- The first marina development is envisioned for the Chapora bay as it is strategically the destination promoted for the yachters' market. Further marina development along the coast is envisioned to be connected through a network of services and standards

Key issues to be addressed

- Location:** Final location has to be well thought out after a thorough study of the terrain and avoid trampling on existing local and fishing activities.
- Development Program:** determine the optimum size and the list of components to be included as part of the development
- The development of the marina should be best left to the private industry and stakeholders (Government to be the licensing authority and a catalyst).
- Include an assessment of the general opinion of the initiative and its impact in the media.

Understood as an anchor of a mixed-use development which includes accommodation, retail, F&B and entertainment premises



Potential locations	Facilities and land requirements
Nauxi Bay, Chicalim and Britona	-

Description and tasks
<ul style="list-style-type: none"> • The programme includes the master plan and development plan for a full-service marina with commercial, residential and leisure components, as well as access and security services for the nautical tourism market. • The first component to develop is the mooring area, which will include: water supply, supply of electricity, telephone and internet, septic tank emptying, 24 hour fuel supply, VIP area, private parking, among others. • The mixed-use development that forms part of the Marina will include: retail, tourism and residential accommodation units, leisure & entertainment offering. • Additionally, the development will need to include large open spaces for public use to allow the flow and concentration of significant numbers of people. • The access to the marina must be restricted, with an emphasis on promoting pedestrian access. The volume of vehicles with direct access must be restricted. • Parking areas must be created in the vicinity and the footpaths network providing access from these to the marina must be improved.

Benchmark and character images



"Best Practices"

- Victoria & Alfred Waterfront, South Africa
- Caudan Waterfront, Mauritius
- Pier 39, San Francisco





Coastal Programs - Initial investment concepts

Estimations refer to the costs of building one unit/ facility

Programs	cost concept	Unit of measure	Cost per unit (INR)	Number of units	Total Cost (INR Cr.)	Financial Model	
						Public	Private
1.- Regeneration/ Up gradation of Beaches	Urbanized beaches	Linear metre	55,667.3	1,000	5.57	100%	
	Non-urbanized (natural) beaches	Linear metre	27,833.7	1,000	2.78	100%	
2.- Fishermen Market and F&B Court	Fishermen Market	Use existing fishermen market					
	F&B court (core and shell)	sq. m.	17,200	1,000 sq. m.	1.72	100%	
3.- High-end music venue paired with luxury lifestyle resort	Resort + Venue	keys	4,128,600	300 keys	123.86		100%
4.- High-end lifestyle beach club paired with luxury lifestyle resort	Resort + Beach Club	keys	3,440,500	250 keys	86		100%
5.- Eco-beach (Resort)	Resort	keys	2,752,400	55 keys	15.14		100%
	Discovery Eco Centre	Units	4,816,700	1 unit	0.5	100%	
6.- Marina*	Berths (including site preparation)	Berths	2,408,350	50	12.04		100%
	Mixed-use development	sq. m.	47,135	15,000 Sq. m.	70.7		

These costs do not include the cost of land

(*) Investment is subject to specific project conditions and may vary largely depending on location, site preparation, marina construction works and development program

Coastal Programs - Estimated initial investment (phased over the next 10 years)



Coastal Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Regeneration/ Up gradation of Beaches	8 km of urbanized beaches + 22 km of natural beaches	105.8	35.3	35.3	35.3	-	-	-	-	-	-	-
2.- Fishermen Market and F&B Court	3 F&B Courts	5.2	1.7	1.7	1.7	-	-	-	-	-	-	-
3.- High-end music venue paired with luxury lifestyle resort	1 Resort	123.9	0.0	-	61.9	61.9	-	-	-	-	-	-
4.- High-end lifestyle beach club paired with luxury lifestyle resort	1 Resort	86.0	0.0	-	43.0	43.0	-	-	-	-	-	-
5.- Eco-beach (Resort)	3 Resorts	46.9	0.0	-	15.6	15.6	15.6	-	-	-	-	-
6.- Marina	1 Marina	82.7	0.0	-	27.6	27.6	27.6	-	-	-	-	-
Total Coastal Programs Budget		450.4	37.0	37.0	185.1	148.1	43.2	-	-	-	-	-
(%)		100%	8.21%	8.21%	41.10%	32.89%	9.59%	-	-	-	-	-



Coastal Programs - Reinvestment (1.5% of estimated initial investment)

Coastal Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Regeneration/ Up gradation of Beaches	8 km of urbanized beaches + 22 km of natural beaches	12.7	-	0.5	1.1	1.6	1.6	1.6	1.6	1.6	1.6	1.6
2.- Fishermen Market and F&B Court	3 F&B Courts	0.6	-	0.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
3.- High-end music venue paired with luxury lifestyle resort	1 Resort	11.1	-	-	-	-	1.9	1.9	1.9	1.9	1.9	1.9
4.- High-end lifestyle beach club paired with luxury lifestyle resort	1 Resort	7.7	-	-	-	-	1.3	1.3	1.3	1.3	1.3	1.3
5.- Eco-beach (Resort)	3 Resorts	4.2	-	-	-	0.2	0.5	0.7	0.7	0.7	0.7	0.7
6.- Marina	1 Marina	6.2	-	-	-	-	-	1.2	1.2	1.2	1.2	1.2
Total Coastal Programs Budget		42.6	0.0	0.6	1.1	1.9	5.3	6.8	6.8	6.8	6.8	6.8
(%)		100%	-	1.30%	2.60%	4.45%	12.39%	15.85%	15.85%	15.85%	15.85%	15.85%



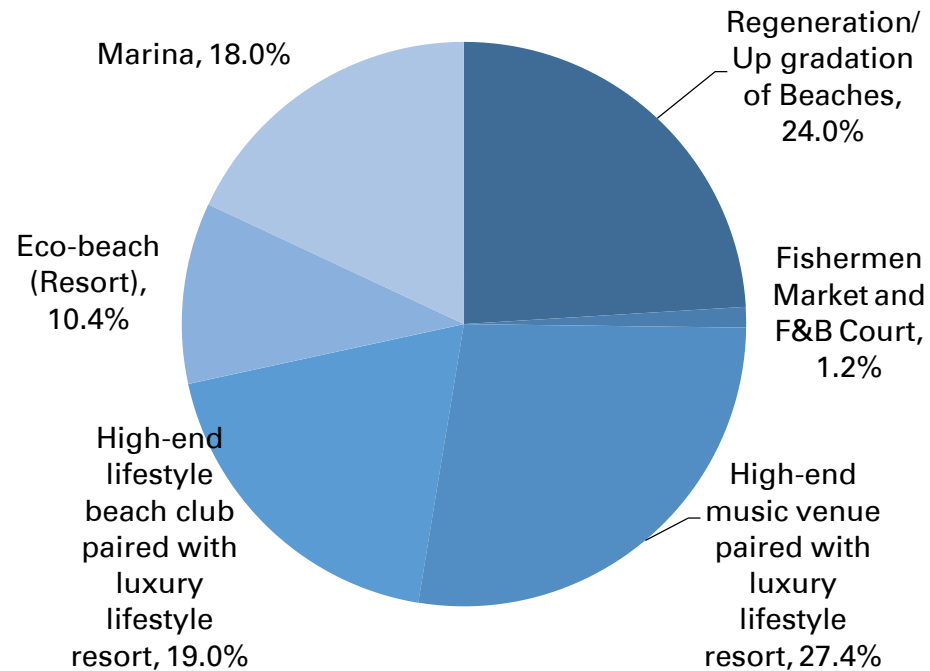
Coastal Programs - Total estimated initial investment + Reinvestment

Coastal Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Regeneration/ Up gradation of Beaches	8 km of urbanized beaches + 22 km of natural beaches	118.5	35.3	35.8	36.3	1.6	1.6	1.6	1.6	1.6	1.6	1.6
2.- Fishermen Market and F&B Court	3 F&B Courts	5.8	1.7	1.7	1.8	0.1	0.1	0.1	0.1	0.1	0.1	0.1
3.- High-end music venue paired with luxury lifestyle resort	1 Resort	135.0	-	-	61.9	61.9	1.9	1.9	1.9	1.9	1.9	1.9
4.- High-end lifestyle beach club paired with luxury lifestyle resort	1 Resort	93.8	-	-	43.0	43.0	1.3	1.3	1.3	1.3	1.3	1.3
5.- Eco-beach (Resort)	3 Resorts	51.1	-	-	15.6	15.9	16.1	0.7	0.7	0.7	0.7	0.7
6.- Marina	1 Marina	88.9	-	-	27.6	27.6	27.6	1.2	1.2	1.2	1.2	1.2
Total Coastal Programs Budget		493.0	37.0	37.5	186.2	150.0	48.5	6.8	6.8	6.8	6.8	6.8
(%)		100%	7.50%	7.61%	37.77%	30.43%	9.83%	1.37%	1.37%	1.37%	1.37%	1.37%

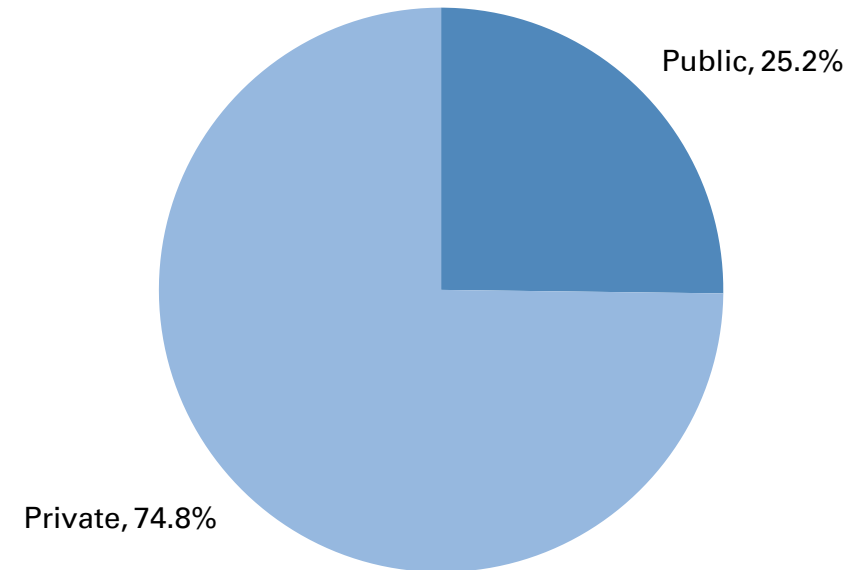
Coastal Programs - Distribution of total estimated initial investment + Reinvestment



**Coastal Budget
Total Distribution by Program**



**Coastal Budget
Public Vs. Private**



Total expected cost
(over the next 10 years)
INR 493 Cr.

Coastal Programs - Facility Management Recurrent Expenditures (2% of estimated initial investment)



Coastal Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Regeneration/ Up gradation of Beaches	8 km of urbanized beaches + 22 km of natural beaches	16.9	-	0.7	1.4	2.1	2.1	2.1	2.1	2.1	2.1	2.1
2.- Fishermen Market and F&B Court	3 F&B Courts	0.8	-	0.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
3.- High-end music venue paired with luxury lifestyle resort	1 Resort	Not Estimated										
4.- High-end lifestyle beach club paired with luxury lifestyle resort	1 Resort	Not Estimated										
5.- Eco-beach (Resort)	3 Resorts	0.2	-	-	-	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6.- Marina	1 Marina	Not Estimated										
Total Coastal Programs Budget		17.9	0.0	0.7	1.5	2.2	2.2	2.2	2.2	2.2	2.2	2.2
(%)		100%	-	4.13%	8.25%	12.43%	12.49%	12.54%	12.54%	12.54%	12.54%	12.54%

Facility Management Recurrent Expenditures refers to maintenance, cleanliness and security of the facility
Private annual recurrent expenses related with Facility Management are not estimated
(*) Refers to the Discovery Eco Centres only



Coastal Programs - Financing Options

Coastal Program Initiatives					
Regeneration/ Up gradation of Beaches	Fishermen Market and F&B Court	High-end music venue paired with luxury lifestyle resort	High-end lifestyle beach club paired with luxury lifestyle resort	Eco-beach (Resort)	Marina
<ul style="list-style-type: none"> ❑ The State government predominantly would fund this initiative with limited help from private players which could include shack owners and hotels ❑ The financing could also be done through a BOT model with private hotels, with infrastructure costs borne by the State government 	<ul style="list-style-type: none"> ❑ Financing options would include PPP with major F&B player entering into contract with the State government 	<ul style="list-style-type: none"> ❑ Financing through private participation with major global hotel chains funding the initiative under complete ownership or with partnerships with major international lifestyle brands 	<ul style="list-style-type: none"> ❑ Financing through private participation with major global hotel chains funding the initiative under complete ownership or with partnerships with major international lifestyle brands 	<ul style="list-style-type: none"> ❑ Central or state government/ Multilateral agency funding with eco-conservation for development of area ❑ An alternative financing scheme would be partnerships with CSR department of multinational firms and the State government to foster eco-tourism ❑ Private participation in financing of individual projects 	<ul style="list-style-type: none"> ❑ Predominantly financing through private participation with major tourism players



Coastal Tourism Programs - Summary

Program	Implementation					Financing model		Operations model	
	Flagship program	'Quick win'	Short term	Medium term	Long term	Public	Private	Public	Private
1- Regeneration/ Up gradation of Beaches	✓	✓	✓			Lead	Support	Lead	Service contract
2- Fishermen Market and F&B Court	✓	✓	✓			PPP		Support	Lead
3- High-end music venue paired with luxury lifestyle resort	✓			✓		Support	Lead	Support	Lead
4- High-end lifestyle beach club paired with luxury lifestyle resort				✓		Support	Lead	Support	Lead
5- Eco-beach (Resort)				✓		Support	Lead	Support	Lead
6- Marinas					✓	Support	Lead	Support	Lead

Short term: within 3 years

Medium term: 3 - 5 years

Long term: 5 years/ above

Culture & Heritage Programs



★ Flagship programs

⚡ Quick Wins

1	Forts <i>Reis Magos, Tiracol, Chapora, Aguada and Cabo de Rama</i>	★ ⚡	Goa
2	Monuments <i>Key Pilot projects: Old Goa Churches, Mary Immaculate Church, Mangueshi & Shantadurga Temples, Tambdi Surla, Pansaimol rock carvings, Kurdi temple</i>	★ ⚡	Paris
3	Villages (arrive and walk) <i>Siolim, Sangolda, Divar, Chorao, Pomburpa, Aldona, Chandor, Gaondongri, Rivona, Naroa</i>	★	Mexico
4	Old Goan Houses <i>Panaji- Fontainhas, Aldona, Siolim, Colvale, Chandor, Curtorim, Raia, Sanguem</i>	★	United Kingdom
5	Culinary <i>Across Goa</i>	★	Barcelona
6	Cultural Events <i>Kala Academy and state monuments wherever possible</i>	⚡	France
7	The Goa Multimedia Experience <i>Old Goa Church Complex/ environs or Kala Academy</i>	⚡	Malta
8	Handicrafts <i>Sale of products via GHRSSIDC (Aparant) in dense tourist locations & online channels</i>		Cambodia



Product: Culture & Heritage tourism	
Flagship program	Quick wins
✓	✓
Timeframe: Short term	
Concept and objectives	<ul style="list-style-type: none"> There are number of important forts along the coastal line reminiscent of the state's interesting past. The recovery and development of this heritage is part of an overall plan to promote the history and culture of Goa, which, as said previously, not only benefits the local community but also has the potential to attract tourists. The programme aims to provide visitors with a pleasant experience and also to enhance it through the development of an F&B, events and retail (markets) offering.
Accommodation needs	<ul style="list-style-type: none"> Forts converted to heritage/ boutique hotels (i.e. Fort Tiracol) Boutique hotels in the vicinity
Market strategy	<ul style="list-style-type: none"> Tourists (domestic and foreign) and local population Day and overnight visitors (including day cruise visitors)
Commercial strategy	<ul style="list-style-type: none"> The network of forts is one of Goa's most important historical legacies and it is part of its identity. A tour of any of the forts will give the visitors an idea of Goa's past and will help them understand its present.

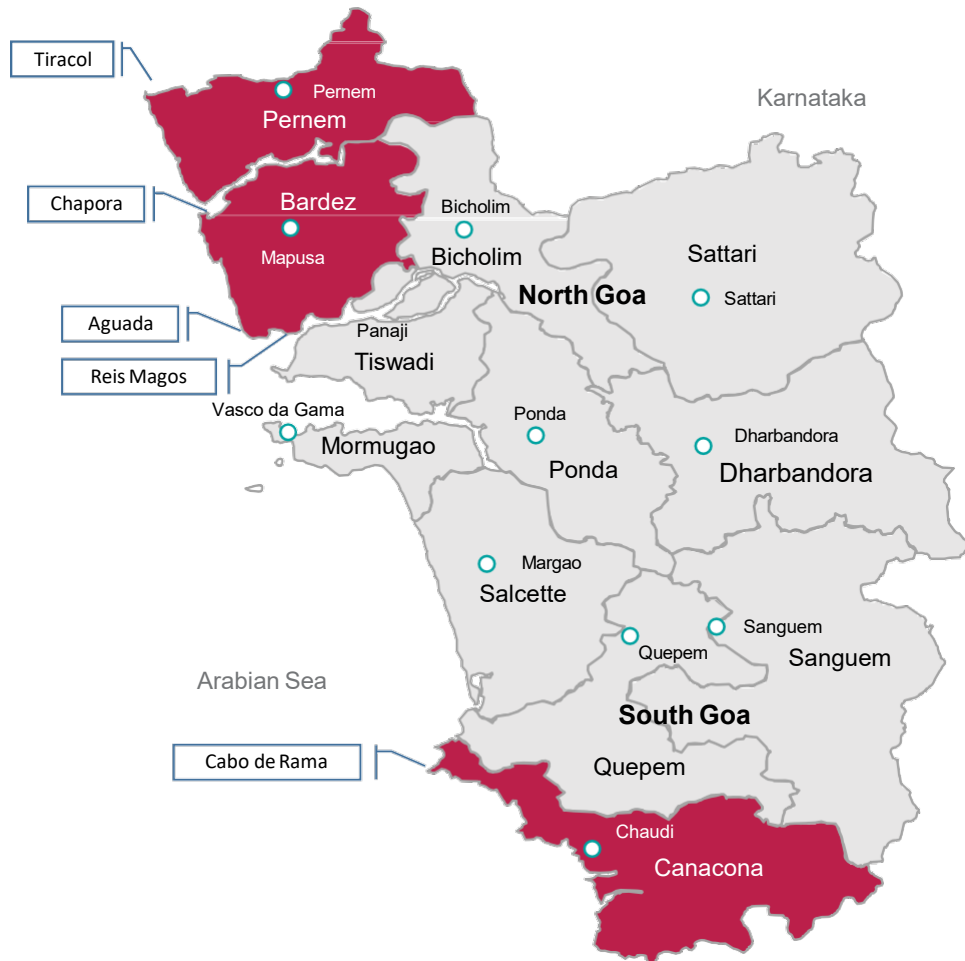
Implementation strategy

- Goa already has two interesting examples (Reis Magos and Tiracol) of how assets can be restored, bring them to life and be used by the city and the community. The first phase of the programme involves the adaptation of these places with the aim to improve the experience.
- In the second phase, this experience will be replicated for the rest of forts in the network.

Key issues to be addressed

- Potential conflicts due to the incompatibility of uses in heritage buildings
- Carrying capacity
- Possible sources of financing
- Stakeholder's enrolment (tours operators, travel agencies, tour guides, press, local tourism development units, rural exploitations, etc.) in order to create the tourism product

Providing nice visitor journey experience and enhance with complementary offer such as F&B, retail and events



Potential locations	Facilities and land requirements
Forts Reis Magos, Tiracol, Chapora, Aguada and Cabo de Rama	N/A
Description and tasks	
<ul style="list-style-type: none"> • Aspects to be addressed to improve facilities: transport and infrastructure to access the premises, including specially abled access facilitation, signage, safety, surveillance cameras, first aid kits, public amenities like toilets and cloak rooms, interpretation tools such as panels and information in the premises, use of new technologies, access to Internet, tourist mobile apps • Aspects to be addressed to add new facilities: museum/ visitor centre / interpretation centre, restaurant or cafeteria, souvenir shop, toilets, parking area, boutique hotel accommodation, sufficient illumination • Funding can be procured through national/ regional funds programmes, along with innovative financing methods like corporate CSR • Aspects related with operational guidelines: develop code of conduct for visitors, tourists, employees and residents, providing guidelines, develop maintenance plans and schedules for cleanliness and safety in order to enhance preservation, tour guide regulations, collaborate with respective Govt. depts, among others • Actions linked to the holding of events: programming a schedule of cultural events (weekly / monthly) on the fort premises, scheduling of talks or conferences with academics or historians • Actions associated to the enhancement of the forts network (if applicable): recovery and development of old communication routes between forts for tourism purposes, improve accessibility, improve basic tourist infrastructures associated to the route, provide bus services, develop points of interest 	

Benchmark and character images



"Best Practices"

- In Goa: Reis Magos Fort (<http://www.reismagosfort.com/>)
- Also in Goa: Tiracol Fort (<http://www.forttiracol.in/gallery.aspx>)
- International references: The Culture and Heritage Museums in York County (<http://www.chmuseums.org/>)
- Hong Kong Heritage Museum





Monuments (Temples, Churches, Museums & other Archaeological sites)

Product: Culture & Heritage tourism	
Flagship program	Quick wins
✓	✓
Timeframe: Short term	
Concept and objectives	<ul style="list-style-type: none">• The historic structures that form part of Goa's tangible historical legacy are undoubtedly one of the key assets that differentiate the area's appeal and offering from that of other competitor destinations (both national and international).• Culture & Heritage tourism has been defined in the plan as one of the 'core' products and therefore the main strategy here focuses on the upgrade and improvement of the assets as key demand stimulators.• Maintenance and development of assets and supporting infrastructure are part of the key areas for improvement
Accommodation needs	<ul style="list-style-type: none">• Monuments converted to heritage/ boutique hotels (i.e. Fort Tiracol)• Accommodation in case of cluster of sites
Market strategy	<ul style="list-style-type: none">• Tourists (domestic and foreign) and resident population• Day and overnight visitors (including day cruise visitors)

Commercial strategy

- Beaches along the coast of Goa will provide its resident population, the tourism industry and tourists with basic services that cater for their needs and requirements.

Implementation strategy

- Launch Old Goa Church Complex as pilot project to showcase results and create awareness.
- The program will implement good practices in these processes and replicate the experience in other assets.

Key issues to be addressed

- Potential conflicts due to the incompatibility of uses in heritage buildings
- Carrying capacity
- Possible sources of financing
- Stakeholder's enrolment (tours operators, travel agencies, tour guides, press, local tourism development units, rural exploitations, etc.) in order to create the tourism product

Key area for improvement: Maintenance and development of assets and supporting infrastructure



Potential locations (Pilot projects)	Facilities & land requirements
<ul style="list-style-type: none"> Old Goa Church Complex , Mary Immaculate Church, Mangueshi and Shantadurga Temples, Safa masjid Tambdi Surla temple, Pansaimol rock carvings, Mahadev temple at Kurdi, Arvalem Caves Museums – Goa state and Naval 	N/A
Description and tasks	
<ul style="list-style-type: none"> Showcase 3 categories: ‘must see assets’; ‘nice to see assets’ and ‘assets for specialized tourism’, in order to prioritize budgets and actions to be undertaken. Ensure nice visitor experience: location finding; cleaning and maintenance; access; parking; barrier free access facilitation for the specially abled, toilets and F&B in ‘must see assets’. Collaboration with other Govt. departments Interpretation centres in case site clusters, with different levels of explanation A successful case study for crowd funding in tourism would be Rome and Pompeii in Italy <ul style="list-style-type: none"> The Govt. has taken steps to introduce funding sources for cultural heritage outside of the tax revenue and federal and EU-wide projects that typically support preservation projects. Ultimately, this new initiative has brought forth alternative funding through crowd funding from wealthy corporations. Many companies funding restoration are Italian luxury and fashion brands. Tod’s funded a €25 million restoration of the Colosseum. Fendi sponsored a €2.2 million restoration of the Trevi Fountain. Bulgari invested €1.5 million to the restoration of the Spanish Steps. It is imperative however that the related advertising is done in a discreet manner. 	

Benchmark and character images



"Best Practices"

- Museum of Civilization Quai Branly in Paris (www.quaibranly.fr/en)
- Museum of Cultures del Món, Barcelona (museuculturesmon.bcn.cat/en)
- Las Rutas de El legado andalusí (Gran Itinerario Cultural del Consejo de Europa)
- European Institute of Cultural Routes (culture-routes.net/routes)
- Examples of accommodation: CGH Earth, India (www.cghearth.com); Paradores, Spain (www.paradores.es)



Examples of mining and industrial heritage sites converted into tourist attractions



Spain – as many other countries in Europe and America – has several examples of mining sites that have been converted into tourist attractions where tourists and visitors are able to see and experience the present or historic heritage extraction processes

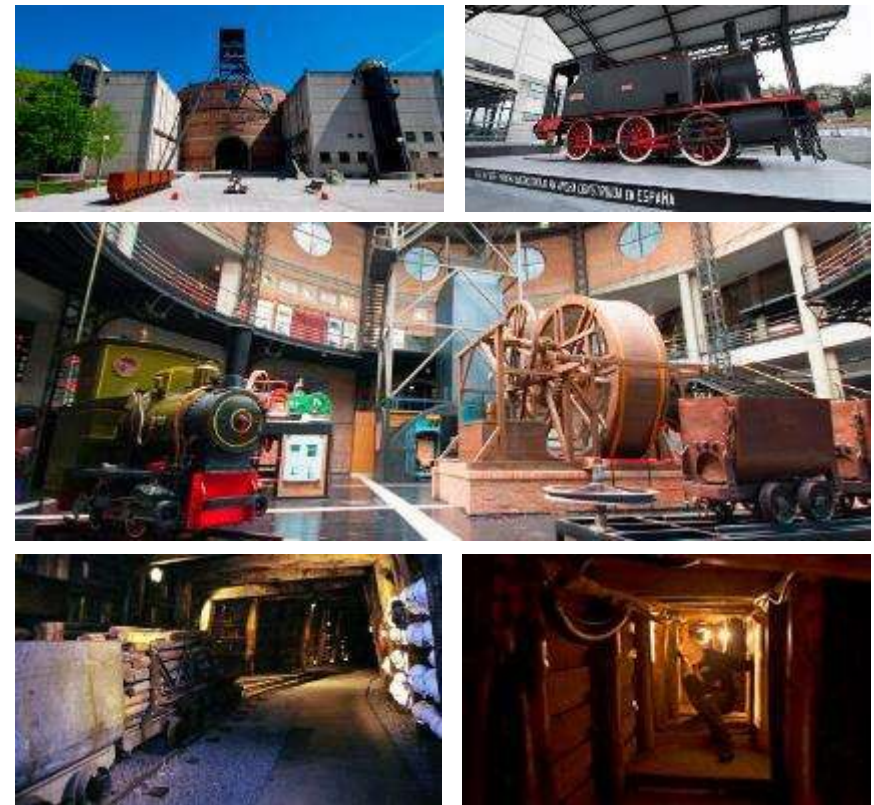
The Mining and Industry Museum of Asturias

- The Mining and Industry Museum of Asturias (MUMI), founded by the Principado de Asturias and Caja de Asturias, pays tribute to coal mining, an activity that has determined the social and industrial situation of Asturias for two centuries.
- Throughout the different sections of the Mining and Industry Museum of Asturias, visitors can explore various old machines that were used in European mining before the steam and industrial revolution occurred, as well as the explosives used to extract the minerals
- Visitors can also experience what it's like to be in a mine and learn about the different systems used to obtain coal by using the 'cage' (the miners lift) which will take them down to the mine
- A walk around the museum lets tourists understand various scientific instruments used in the scientific and industrial development of the society, mining hospitals, electrical work, minerals and fossils

**Suggested time
for the visit**

- 2 hours 30 minutes

Source: <http://www.mumi.es/media/Default%20Files/MUMI/MUMIEN/index.html>



Examples of mining and industrial heritage sites converted into tourist attractions



Minas de Cercs Museum

- The permanent exhibition is divided into 2 spaces: coal, its mining, the importance of coal infrastructures, transport and its previous screening before use, both as home and industrial fuel and as primary source to produce electricity.
- The new exhibition, "The Spectacle of the Mine," fosters the understanding of the two types of mining developments in use nowadays: underground and opencast mining.
- The museography as it is planned aims at taking the visitor into a history narrated from the future. From here visitors will rediscover the world of mines through projections, holograms and innovative image and sound effects.
- At the end the workers' housing can be seen. The visit is completed by the viewing of an audio-visual based on the Alt Berguedà mining area and the guided visit into the inside of the mine where working conditions through time are to be analysed.

**Suggested time
for the visit**

- 1 hour 30 minutes

Source: <http://www.mmceres.cat/en/museum>





Villages (arrive and walk around)

Product: Culture & Heritage tourism	
Flagship program	Quick wins
✓	
Timeframe: medium term	
Concept and objectives	<ul style="list-style-type: none">Goa is home to a number of villages worth visiting, often scenic and each having a character of its own. Villages tend to be friendly and even good value-for-money. Some of these are gateways to the nearby touristic areas.However, in the last decades Goa has seen unplanned growth as a result of which Goa is losing its identity. The aim of the program consists of creating “clusters” around the villages based on authentic features and provide multi-experience: walking, discovery, Food & Beverage, interpretation centres and storytelling, shopping, stays with workshop, etc.
Accommodation needs	<ul style="list-style-type: none">Mainly acco. that preserve heritage sites and local culture: homestays, guesthouses, Bed & Breakfast, boutique hotels
Market strategy	<ul style="list-style-type: none">Tourists (domestic and foreign) and resident populationDay and overnight visitors (including day cruise visitors)
Commercial strategy	<ul style="list-style-type: none">The visitor will be able to discover the true heart of this small state through the network of villages and hamlets that make it up. Charming villages that are clean and orderly and provide the tourist with a pleasant experience, at the gateway to the territory of Goa.

Implementation strategy

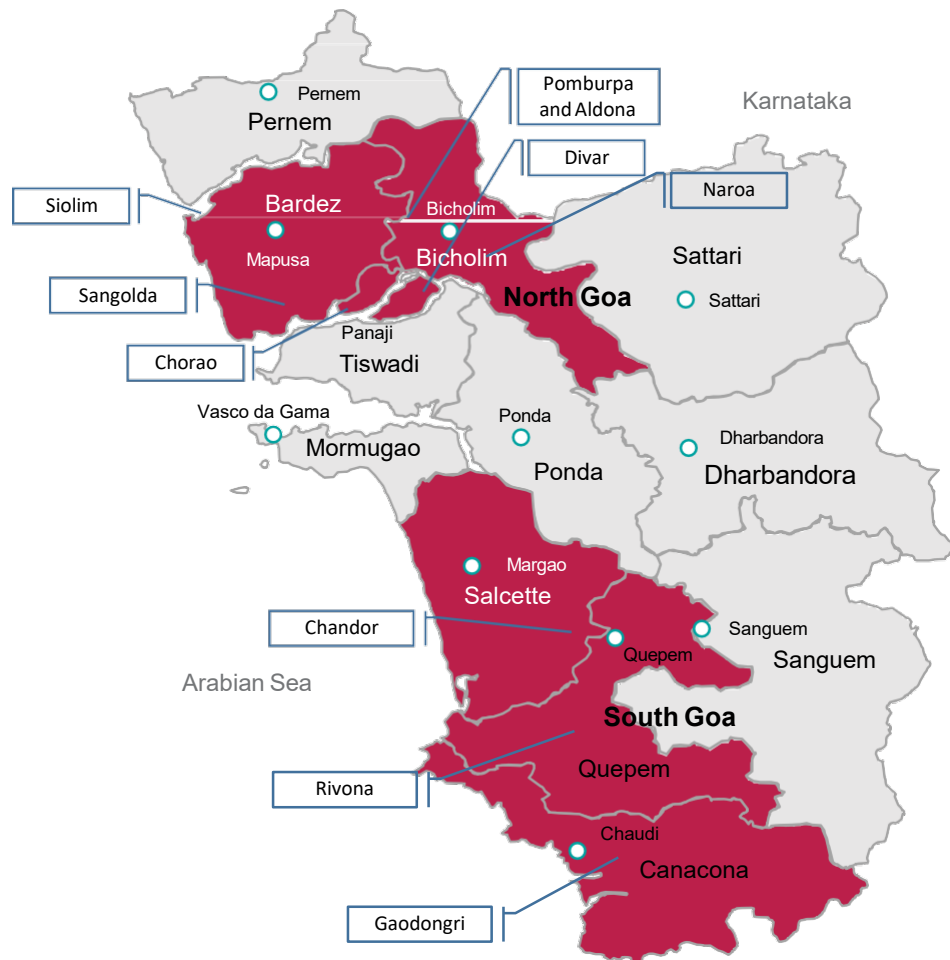
- Launch of a pilot test in a relatively small number of villages, preferably those which are in best condition at present. Provide structures for assistance in the restoration and maintenance of facades, improvement in the conditions of infrastructure and basic services, and the provision of tourist services. Include promotion through their inclusion in an itinerary (providing GPS location and mapping)

Key issues to be addressed

- Draft legislation to architecturally regulate façades & finishing of buildings
- Specific architectural and colour identity (as in every famous tourist destination) – there is need to control and restrict the design and colours of existing and new buildings and houses.
- Possible sources of financing
- Goa has already had a successful experience (the Fontainhas case) in the restoration of heritage buildings and this could be studied and included as a ‘best practice’.
- Quality labels should be implemented to guarantee a best in class experience to visitors, thus encouraging repeat visits.



Highlighting authentic features while providing multi-experience



Potential locations	Facilities and land requirements
Siolim, Sangolda, Divar, Chorao, Pomburpa, Aldona, Chandor, Gaondongrim, Rivona	N/A

Description and tasks
<ul style="list-style-type: none">• Create “clusters” based on authentic features: Chandor, Chorao, Moira, Bastora, Palien, Siolim, Mayem, Gaondongari, Rivona, Narve• Significant emphasis to be put on maintenance of old tradition and culture which is meshed in the social fabric. e.g: Tradition and culture have been evolved as key selling points to tourists in Bali.• Identify relevant stakeholders in those villages that are interested and willing to take part in the program• Provide awareness and training programs to the local stakeholders enrolling the program and to the local population as a whole.• Develop minimum quality standards to be part of the village circuit and get promoted.• Provide multi-experience: walking, discovery, Food & Beverage, interpretation centres and storytelling, shopping, stays with workshop, etc.• More over, identify and provide GPS locations on interesting & well kept Goan houses• Establish a development and improvement plan with the local stakeholders.

Benchmark and character images



"Best Practices"

- Goa: Fontainhas, Salgini
- Bali: Villages have been actively developed as clusters for various traditional activities such as dance, music, wood work, stone work, painting and jewelry
- Bali: The growth of cultural tourism has been promoted through development of stories around key concepts and by maintaining a consistent and credible communication.
- France: Les plus beaux villages de France ; Mexico: Pueblos Mágicos



Old Goan houses



Product: Culture & Heritage tourism	
Flagship program	Quick wins
✓	
Timeframe: Short term (sample) and medium term (full scale development)	
Concept and objectives	<ul style="list-style-type: none"> Goa has beautiful heritage homes, both with Portuguese architecture as well as typical Hindu styles. Gradually, these heritage homes are disappearing on account of lack of funds in the hands of owners of these houses. There is a need to salvage these houses, both by bringing in legislation that would prohibit their demolition and at the same time the creation of a funding process that would enable restoration and maintenance of the homes without it becoming a burden to the families who own them.
Accommodation needs	<ul style="list-style-type: none"> Some houses could be restored and subsequently used as guesthouses or hotels
Market strategy	<ul style="list-style-type: none"> Aimed at both national and international tourists
Commercial strategy	<ul style="list-style-type: none"> Designed to stir the imagination and allow history lovers (but open to all kind of tourists) to stay in some of the most historic buildings/ houses in the state and to fully experience the local culture while travelling.

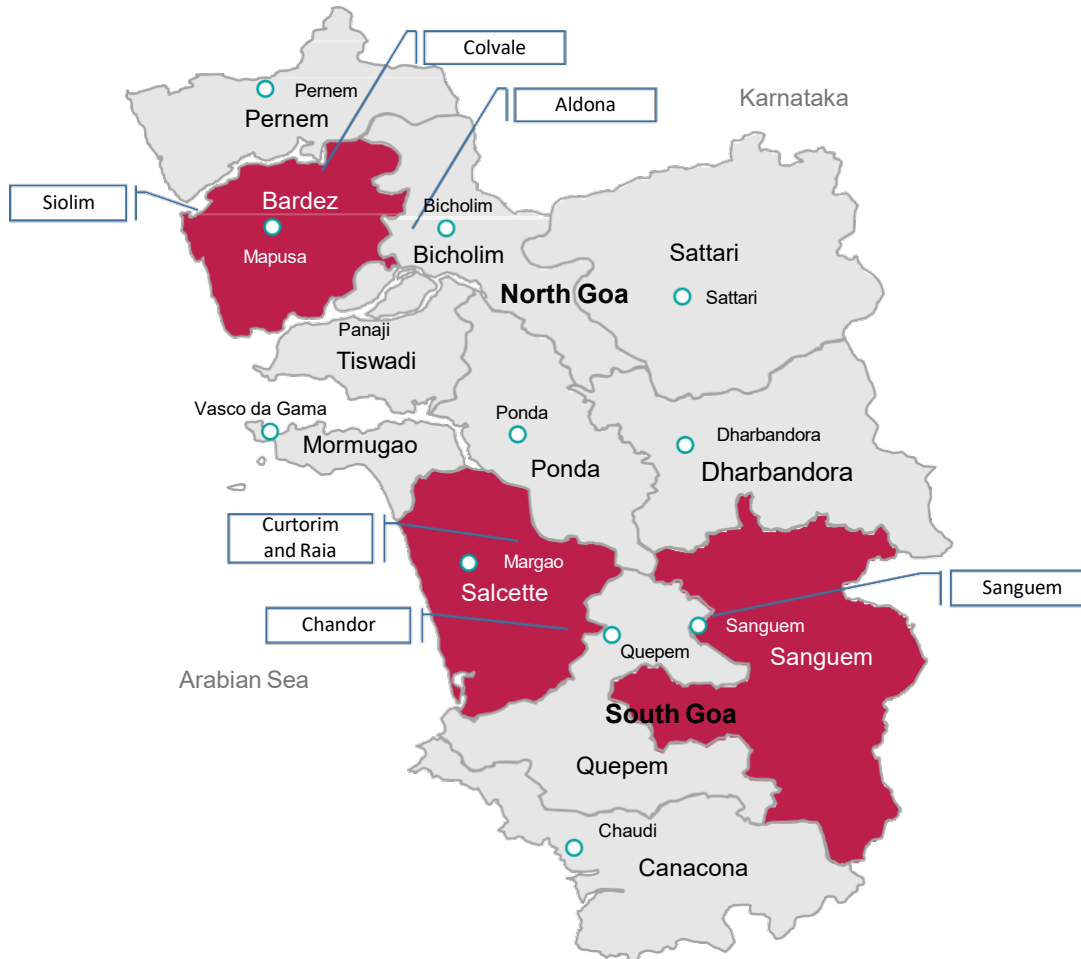
Implementation strategy

- Launch of a pilot test with a relatively small number of properties, preferably those which are in best condition at present. Provide assistance plans for restoration and maintenance and carry out promotion by the inclusion of the structures in an itinerary (providing GPS location mapping).

Key issues to be addressed

- Potential conflicts due to the incompatibility of uses in heritage buildings
- Possible sources of financing
- Goa has already had a successful experience (the Fontainhas case) in the restoration of heritage buildings and this could be studied and included as a 'best practice'
- Draft legislation for the protection of this type of asset
- Quality labels should be implemented to guarantee a best in class experience to visitors, thus encouraging repeat visits.
- Public Private Partnerships

Designed to stir the imagination and allow history lovers to stay in some of the most historic buildings



Potential locations	Facilities and land requirements
Panaji-Fontainhas, Aldona, Siolim, Colvale, Chandor, Curtorim, Raia, Sanguem	N/A
Description and tasks	
<ul style="list-style-type: none"> • Establish a list including both Portuguese and Hindu influence • Identify those well kept and list for initial promotion providing GPS location and mapping • Provide restoration and maintenance schemes • Encourage innovative financing methods, e.g. The Vallès Oriental county comprises 39 municipalities and work on three main lines: communication and promotion, quality and training, and support to the municipalities and the tourism enterprises. Little villages received funds for tourism projects from the European Commission through the counties. • Encourage heritage walks • Include them in themed circuits and encourage complementary use for shops, arts, Food & Beverage; accommodation (homestays and Bed & Breakfast) 	

Benchmark and character images



"Best Practices"

- UK: <http://www.historic-uk.com/>
- Peru
- Spain: Santa María de Palautordera Municipality, Catalonia. Rural tourism has grown in popularity over the last decades and traditional rural houses have been reconverted to cater to tourists needs





Product: Culture & Heritage tourism	
Flagship program	Quick wins
✓	
Timeframe: Short term (sample) and medium term (full scale development)	
Concept and objectives	<ul style="list-style-type: none"> Goa cuisines could be linked with the causes and/or catalysts of the tourism boom in the destination. However, right now it is difficult to find authentic Goa cuisine, especially along the coastal fringe – which is contradictory given that it is the area most visited by tourists. This programme has as its objectives to identify, define and revive authentic Goan food and drinks – experts panel – popular and gastronomic cuisine. Promotion will be carried out via certification of shacks/ restaurants and markets.
Accommodation needs	<ul style="list-style-type: none"> Not linked to a specific accommodation offering
Market strategy	<ul style="list-style-type: none"> Tourists (domestic and foreign) and resident population Day and overnight visitors (including day cruise visitors)
Commercial strategy	<ul style="list-style-type: none"> Following the implementation and launch of this program, tourists will be able to find an authentic quality offer of Goan food, as well as information on its history, ingredients and preparation methods.

Implementation strategy

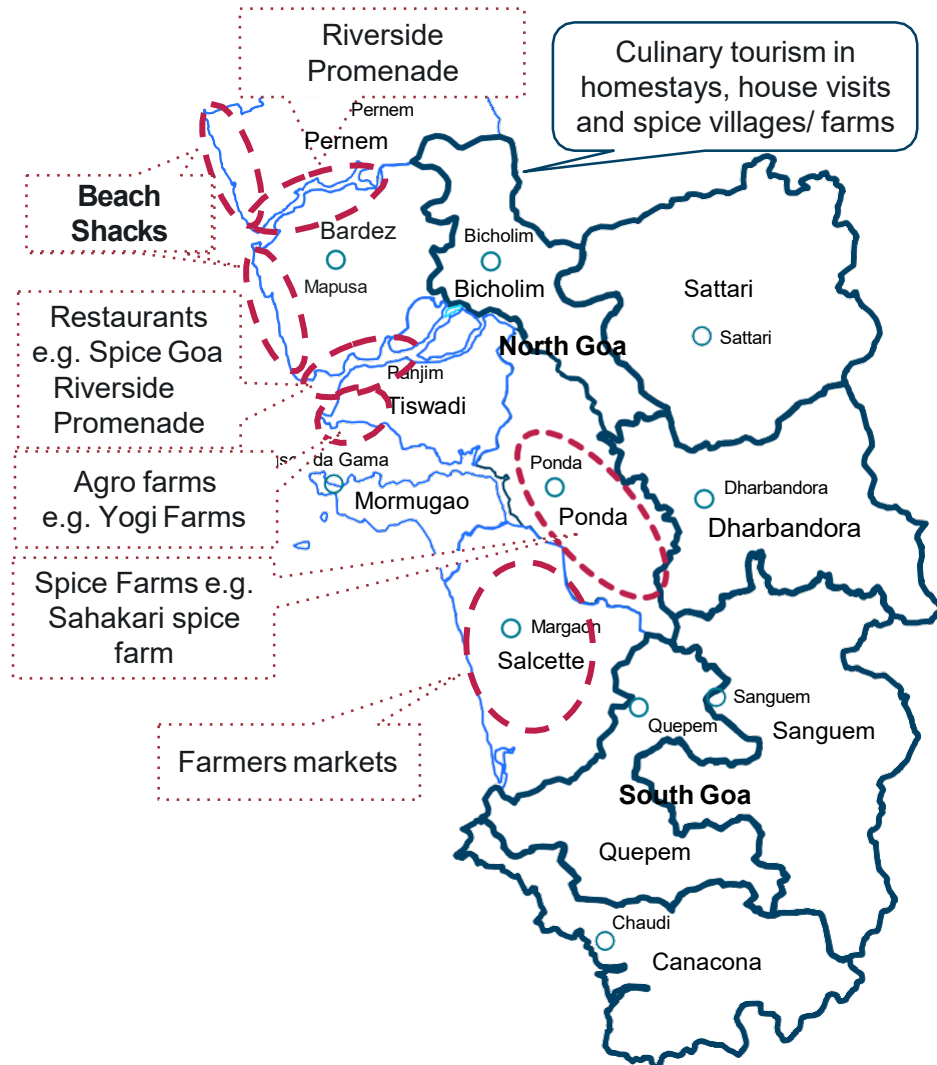
- Launch of a pilot project that includes the creation of a training centre for the teaching and learning of the cooking methods and techniques for typical dishes of Goa cuisine.
- Additionally, it should include the creation of a space where visitors can get to know and can try local products and dishes. This initiative could be associated with the “Fisherman Market and F&B Court” program (see Coastal programs)

Key issues to be addressed

- Preparation of a list, agreed on by a panel of experts, of the dishes – as well as their preparation – that make up the cuisine of Goa
- Showcasing of these Goan dishes and F&B products throughout the Goa State.
- Effective promotion and recognition of this cuisine to and by tourists, visitors and local residents



Goan food and drinks: reviving traditional receipts paired with modern creation



Potential locations	Facilities and land requirements
Across Goa	N/A
Description and tasks	
<ul style="list-style-type: none">• Identify, define and revive authentic Goan food and drinks – experts panel – popular and gastronomic cuisine• Identify and promote shacks and restaurants that offer authentic Goan cuisine through special label• Culinary approach should not be focused only on traditional food but also on creativity process for modern Goan cuisine, using local food & beverage products and different influences• Goan cuisine could be a blend of popular food paired with gastronomic approach• Enhance special culinary events on a weekly, monthly and yearly basis• Goa Food and Cultural Festival should focus more on Goan products and cuisine, though not necessarily exclusively• Spice farms could also play a role and provide culinary experiences with a taste of Goan food using different kind of spices.• 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• Enhance food markets paired with specialized/ themed food courts	

Benchmark and character images



"Best Practices"

- El Nacional (Barcelona) www.elnacionalbcn.com
- Cambrils, Spain: Well known for its restaurants and gastronomic offers, it is a mature family and gastronomic coastal destination. e.g. Pesca Turisme (Active fishing tourism): Visitors spend the entire day fishing alongside expert professionals, helping them in their daily work. A unique opportunity to gauge the sensations of life and work aboard a fishing boat, enjoy a genuine on-board meal with the rest of the crew, and take an active part in casting and drawing in the nets, and you can help to sort and unload the catch. So if you want to help them to fish, just step up!
- Crete (Greece) local cuisine quality label <http://www.cretan-nutrition.gr/>



Cultural events



Product: Culture & Heritage tourism	
Flagship program	Quick wins
	✓
Timeframe: Short term	

Concept and objectives	<ul style="list-style-type: none"> Intangible culture, such as events is a key asset for this product, as many events can be appealing for all types of tourists, not just only for those who have cultural interest. The main concept is to create a calendar of miscellaneous cultural events all year round, especially during the low and mid season, in order to give reasons for people come and repeat their visit Cultural events cover a wide range of topics such as history, traditions, music, carnivals, folklore, theater, etc.
Accommodation needs	<ul style="list-style-type: none"> No specific needs, though boutique and heritage hotels and host accommodation fit very nicely with the cultural event's concepts.
Market strategy	<ul style="list-style-type: none"> Tourists (domestic and foreign) and resident population Day and overnight visitors (including day cruise visitors)

Commercial strategy

- Market Goa as permanent place for events, especially cultural events taking place in different locations
- Some major events should be highlighted / reinforced and marketed as flagship

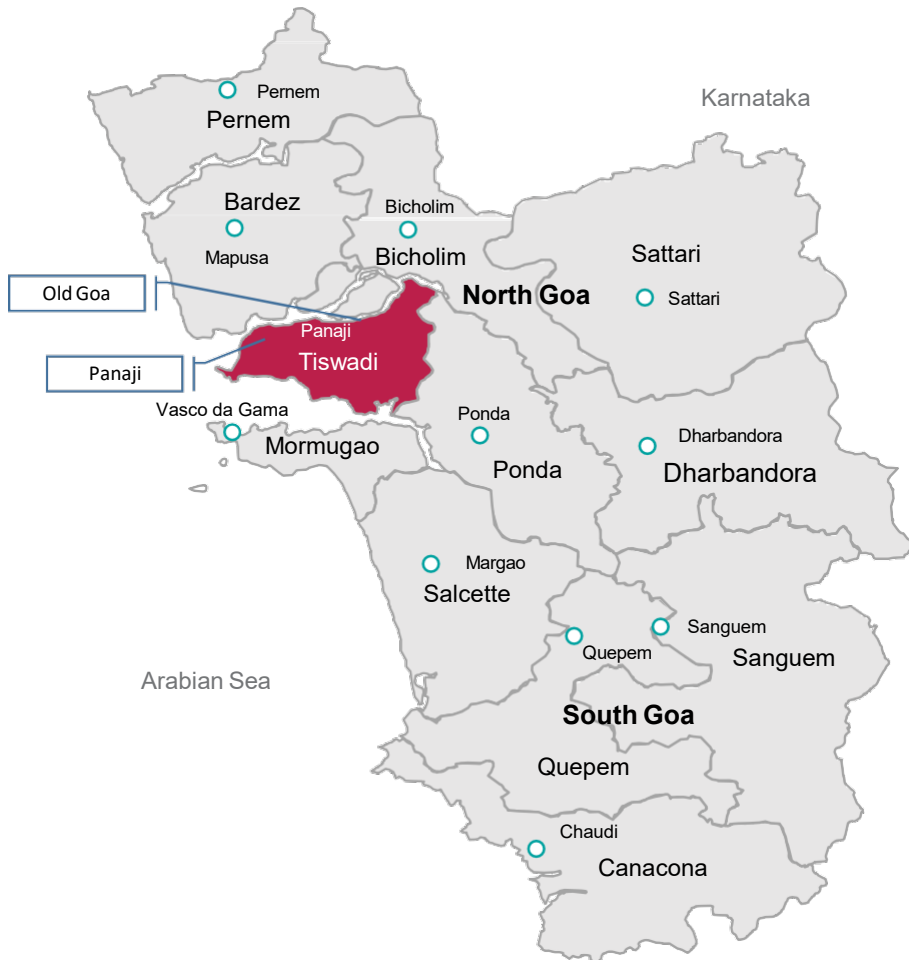
Implementation strategy

- Launch either Calangute Beach to the north or Colva beach in the south as pilot phase to showcase results and create awareness. The program will implement good practice in these processes and replicate the experience in other beaches.

Key issues to be addressed

- Reinforce existing events
- Create a variety of events appealing for different types of public
- Ensure that some events take place in the hinterlands
- Ensure funding for their preparation and celebration
- Ensure long term sustainability of successful events

Featuring a blend of music, art and fashion with day and night atmosphere



Potential locations	Facilities and land requirements
Old Goa, Panaji-Fontainhas, Adil Shah Palace, Church square and different locations on the coast and more importantly in the hinterlands	N/A
Description and tasks	
<ul style="list-style-type: none"> • Annual activity/ event calendar - Define the portfolio of events for the whole year, taking into account variety of cultural expressions: music, dancing, theatre, folklore and traditions, arts, religious, etc. • Promote Goan specific events, showcasing the special features of Goa, but that should not only express the past but can also be modern • Musical events: foster both Indian and Western music expressing the blend of influences received by Goa. • Events sizes: consider a mix of small, medium and mass events • Ensure quality of events: professional participants that provide the show, organization and promotion • Manage post events to maximize cross selling of other events and repeat visits • Collaboration with other Govt. departments to maximize program effectiveness 	



Benchmark and character images

"Best Practices"

- In Goa: Kala Academy
- In Goa: Monte Music Festival sponsored by Fundacao Oriente and Cidade de Goa in association with the Kala Academy
- In Goa: Ketevan and Monte Music Festival, Fontainhas festival
- France: <http://www.provenceweb.fr/e/traditions-provence.htm>





The Goa Multimedia Experience

Product: Culture & Heritage tourism	
Flagship program	Quick wins
Timeframe: medium term	
Concept and objectives	<ul style="list-style-type: none">• The Goa Multimedia Experience is a show that narrates the history of Goa. It can be part of a kind of interactive interpretation centre aimed to raise awareness of Goa's assets (culture, nature, lifestyle, villages, food, drinks, UNESCO World Heritage Sites, Among Others).• It is the “entry gate” to Goa or, a showcase of all the experience offering available to tourists. For this reason, it should be ideally located in the capital or close to one of the most visited cultural attractions in the state.
Accommodation needs	<ul style="list-style-type: none">• Not linked to a specific accommodation offering
Market strategy	<ul style="list-style-type: none">• Tourists (domestic and foreign) and resident population• Day and overnight visitors (including day cruise visitors)
Commercial strategy	<ul style="list-style-type: none">• The Goa Multimedia Experience show will allow visitors to appreciate the idiosyncrasy of the places and the peoples of the state. It will be possible to learn the history behind many of Goa's towns, monuments and traditions.

Implementation strategy

- A place among the potential options is selected and the first version of the show is launched. It is then updated as the new product and experience offering is developed.
- It is a single project, not to be duplicated in different locations/ beaches.

Key issues to be addressed

- Selection of the most suitable place to locate the project
- Take into account conditions of access (both pedestrian and vehicles) and the parking supply



A showcase of all the experiences available to tourists visiting Goa



Potential locations	Facilities and land requirements
Old Goa Church Complex/ environs or Kala Academy	0.5 to 1 Ha in case of building a new facility

Description and tasks
<ul style="list-style-type: none">• Construction of the auditorium or complex (or renovation in case the aim is to use existing facilities) where the multimedia show will be premiered• Design and film production of the multimedia presentation with a summary of Goa's past and present. Goa' main attractions and tourism offerings could also be included.• Remote points (to screen the multimedia presentation) in convenient locations such as the airport, beaches or on location at some of the key cultural/ natural assets.

Benchmark and character images



"Best Practices"

- The Malta Experience





Product: Culture & Heritage tourism	
Flagship program	Quick wins
Timeframe: medium term	
Concept and objectives	<ul style="list-style-type: none"> The state has a diverse cultural heritage derived from its indigenous people, which has been further enriched by the influences of various rulers through its history. This is also captured within the traditional arts and crafts forms that have been passed down the generations within Goan society. The program's main objectives are to identify, define and revive authentic Goan handicraft and one of the means to do so is through the creation of handicraft certified brand, supported by promotion. Developing a network of well-designed shops and markets (with important showrooms in key locations) would help the sale of products.
Accommodation needs	<ul style="list-style-type: none"> Not linked to a specific accommodation offering
Market strategy	<ul style="list-style-type: none"> Tourists (domestic and foreign) and resident population Day and overnight visitors (including day cruise visitors)

Commercial strategy

- Tourist will be sure to get a unique and high quality piece. Most of the craft products that can be admired in the network of certified shops/ markets/ showrooms can be seen in production at open-to-public workshops

Implementation strategy

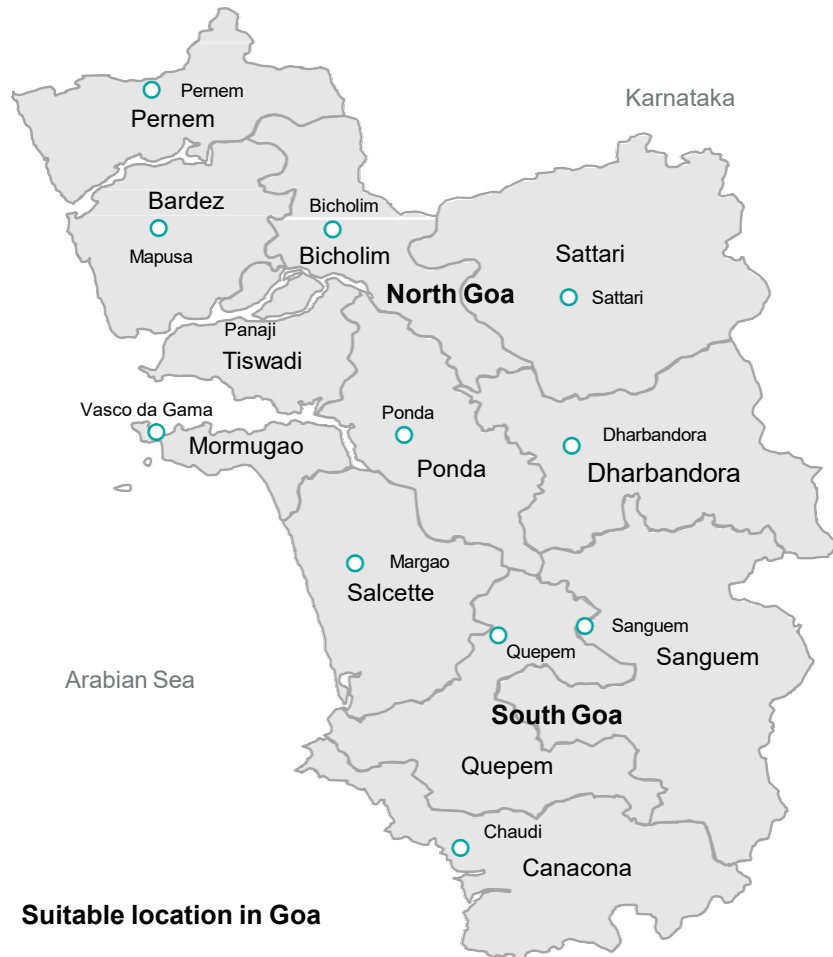
- Launch of a pilot project that includes the creation of a training centre showcasing production methods and techniques of Goan handicrafts. Additionally, it must include the creation of a space for the exhibition and sale of the products. This initiative must be carried out with the help of the private sector.

Key issues to be addressed

- Promotion of authentic Goa handicrafts, as well as their traditional production techniques and methods
- Involvement of the local communities in the programme
- Goa has its Goa Chitra Ethnographic Museum, which could be a reference for "best practices"



Creation of a real showcase of Goan hand-made items



Potential locations	Facilities and land requirements
Sale of products via GHRSSIDC (Aparant) in dense tourist locations & online channels	N/A
Description and tasks	
<ul style="list-style-type: none">• Identify, define and revive authentic Goan handicrafts• Create handicraft production and design training center• Create handicraft certified brand and support with promotion• Create network of nicely designed shops in key locations• Create and support events and markets in different locations, especially in the hinterland villages and towns	



Benchmark and character images

"Best Practices"

- In Goa: Goa Chitra Museum (<http://www.goachitra.com/>)
- Artisans Angkor (<http://www.artisansdangkor.com/#>)
- Bali: Villages have been actively developed as centers for traditional activities - wood work, stonework, painting and jewelry





Culture & Heritage Programs - Initial investment concepts

Estimations refer to the costs of building one unit/ facility

Programs	cost concept	Unit of measure	Cost per unit (INR)	Number of units	Total Cost (INR Cr.)	Financial Model	
						Public	Private
1.- Forts	Adaptation for tourism use + basic facilities: Welcome centre, ticketing, souvenir shop, F&B outlet, toilets, parking, signposting within premises, etc.	Lump sum	20,643,000	N/A	2.4	100%	
2.- Monuments			34,400,000		3.44	100%	
3.- Villages (arrive and walk)	Adaptation for tourism use	Lump sum	55,048,000	N/A	5.5	100%	
4.- Old Goan Houses	Restoration and maintenance	Lump sum	1,032,150	N/A	0.1	50%	50%
5.- Culinary	Goan Culinary World Centre*	sq. m.	47,135	2,000 sq. m.	9.43	100%	
6.- Cultural Events	N/A	N/A	N/A	N/A	N/A	N/A	N/A
7.- The Goa Multimedia Experience	Theatre facility + Production of multimedia film	Lump sum	206,430,000	N/A	20.6	100%	
8.- Handicrafts	Goan Handicraft World Centre	sq. m.	47,135	2,000 sq. m.	9.43	100%	
	Network of specialized shops**	shop	1,720,250	5	0.86		

These costs do not include the cost of land

(*) Similar to the Fishermen Market and F&B Court, this is a place for showcasing, learning, tasting and selling of Food & Beverage products

(**) At least 5 shops located in busy places such as the airport, city centre, main train stations, shopping streets, etc.

Culture & Heritage Programs - Estimated initial investment (phased over the next 10 years)



C&H Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Forts	6 Forts	14.5	4.8	4.8	4.8	-	-	-	-	-	-	-
2.- Monuments	7 Sites/ Monuments	24.1	8.0	8.0	8.0	-	-	-	-	-	-	-
3.- Villages (arrive and walk)	7 Villages	38.5			12.8	12.8	12.8	-	-	-	-	-
4.- Old Goan Houses	50 Heritage houses	5.2	1.7	1.7	1.7	-	-	-	-	-	-	-
5.- Culinary	2 Goan Culinary World Centres	18.9	-	9.4	9.4	-	-	-	-	-	-	-
6.- Cultural Events	N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
7.- The Goa Multimedia Experience	1 Facility	20.6	-	-	10.3	10.3	-	-	-	-	-	-
8.- Handicrafts	1 Goan Handicraft World	9.4	-	-	4.7	4.7	-	-	-	-	-	-
Total C&H Programs Budget		131	15	24	52	28	13	-	-	-	-	-
(%)		100%	11.11%	18.29%	39.55%	21.26%	9.79%	-	-	-	-	-

Culture & Heritage Programs - Reinvestment (1.5% of estimated initial investment)



C&H Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Forts	6 Forts	1.7	-	0.1	0.1	0.2	0.2	0.2	0.2	0.2	0.2	0.2
2.- Monuments	7 Sites/ Monuments	2.9	-	0.1	0.2	0.4	0.4	0.4	0.4	0.4	0.4	0.4
3.- Villages (arrive and walk)	7 Villages	3.5	-	-	-	0.2	0.4	0.6	0.6	0.6	0.6	0.6
4.- Old Goan Houses	50 Heritage houses	0.6	-	0.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
5.- Culinary	2 Goan Culinary World Centres	2.0	-	-	-	0.3	0.3	0.3	0.3	0.3	0.3	0.3
6.- Cultural Events	N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
7.- The Goa Multimedia Experience	1 Facility	1.9	-	-	-	-	0.3	0.3	0.3	0.3	0.3	0.3
8.- Handicrafts	1 Goan Handicraft World	0.8	-	-	-	-	0.1	0.1	0.1	0.1	0.1	0.1
Total C&H Programs Budget		13.4	-	0.2	0.4	1.1	1.8	2.0	2.0	2.0	2.0	2.0
(%)		100%	-	1.63%	3.26%	8.44%	13.25%	14.68%	14.68%	14.68%	14.68%	14.68%

Culture & Heritage Programs – Total estimated initial investment + Reinvestment

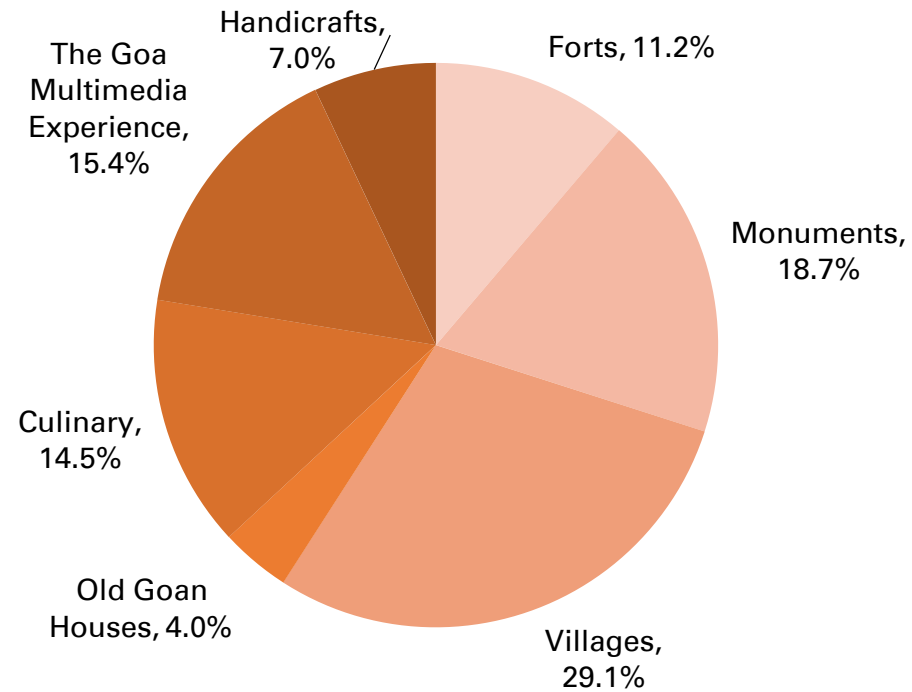


C&H Programs Yearly Budget	Number of projects	Total (INR cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Forts	6 Forts	16.2	4.8	4.9	5.0	0.2	0.2	0.2	0.2	0.2	0.2	0.2
2.- Monuments	7 Sites/ Monuments	27.0	8.0	8.1	8.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4
3.- Villages (arrive and walk)	7 Villages	42.0	-	-	12.8	13.0	13.2	0.6	0.6	0.6	0.6	0.6
4.- Old Goan Houses	50 Heritage houses	5.8	1.7	1.7	1.8	0.1	0.1	0.1	0.1	0.1	0.1	0.1
5.- Culinary	2 Goan Culinary World Centres	20.8	-	9.4	9.4	0.3	0.3	0.3	0.3	0.3	0.3	0.3
6.- Cultural Events	N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
7.- The Goa Multimedia Experience	1 Facility	22.5	-	-	10.3	10.3	0.3	0.3	0.3	0.3	0.3	0.3
8.- Handicrafts	1 Goan Handicraft World	10.3	-	-	4.7	4.7	0.1	0.1	0.1	0.1	0.1	0.1
Total C&H Programs Budget		144.5	14.6	24.2	52.3	29.0	14.6	2.0	2.0	2.0	2.0	2.0
(%)		100%	10.08%	16.75%	36.19%	20.07%	10.11%	1.36%	1.36%	1.36%	1.36%	1.36%

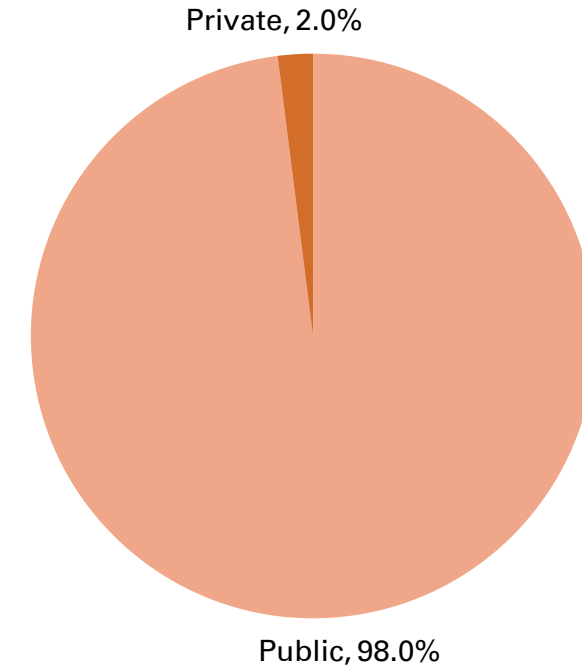
Culture & Heritage Programs – Total estimated initial investment + Reinvestment



**Culture & Heritage Budget
Total Distribution by Program**



**Culture & Heritage Budget
Public Vs. Private**



Total expected cost
(over the next 10 years)
INR 144.5 Cr.

Culture & Heritage Programs - Facility Management Recurrent Expenditures (2% of estimated initial investment)



C&H Programs Yearly 2027 Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	
1.- Forts	6 Forts	2.3	-	0.1	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.3
2.- Monuments	7 Sites/ Monuments	3.9	-	0.2	0.3	0.5	0.5	0.5	0.5	0.5	0.5	0.5
3.- Villages (arrive and walk)	7 Villages	4.6	-	-	-	0.3	0.5	0.8	0.8	0.8	0.8	0.8
4.- Old Goan Houses	N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
5.- Culinary	2 Goan Culinary World Centres + 1 Big Annual Culinary Event	6.1	0.3	0.3	0.3	0.7	0.7	0.7	0.7	0.7	0.7	0.7
6.- Cultural Events	Lump Sum	3.4	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
7.- The Goa Multimedia Experience	1 Facility	2.5	-	-	-	-	0.4	0.4	0.4	0.4	0.4	0.4
8.- Handicrafts	1 Goan Handicraft World + 5 shops	6.3	-	-	-	-	1.0	1.0	1.0	1.0	1.0	1.0
Total C&H Programs Budget		29.1	0.7	0.9	1.2	2.1	3.8	4.1	4.1	4.1	4.1	4.1
(%)		100%	2.37%	3.25%	4.13%	7.20%	13.11%	13.99%	13.99%	13.99%	13.99%	13.99%

Facility Management Recurrent Expenditures refers to maintenance, cleanliness and security of the facility
Private annual recurrent expenses related with Facility Management are not estimated



Culture & Heritage Programs – Financing Options

Culture & Heritage Program Initiatives					
Forts and monuments	Villages (arrive and walk) and old Goan houses	Culinary	Cultural Events	Goa Multimedia Experience	Handicrafts
<ul style="list-style-type: none"> ❑ The proposed financing method would be through Central government and state government schemes ❑ Funding opportunities can also be explored through promotion support and joint ventures with private brands 	<ul style="list-style-type: none"> ❑ Private participation in financing ❑ Financing could be explored through support from CSR initiatives of multinational corporations along with government schemes for development of area ❑ Funding support can also be explored through hotel chains and multilateral organisations for developing model tourist experience villages 	<ul style="list-style-type: none"> ❑ Private participation in financing ❑ Funding would be potentially obtained through investments from restaurants and global / national food chains ❑ State government joint venture with local food chains to develop the unique Goan food destination 	<ul style="list-style-type: none"> ❑ Government funding with support from private parties depending on nature of event 	<ul style="list-style-type: none"> ❑ Investments through private parties with support from State government ❑ Funding through experience lifestyle chains to develop the Goan cultural multimedia experience in the selected locations 	<ul style="list-style-type: none"> ❑ State and Central government funding support through SME funding schemes ❑ State joint ventures with leading e-commerce ventures to provide funds and provide online commerce infrastructure support

Culture & Heritage Programs - Summary



Program	Implementation					Financing model		Operations model	
	Flagship program	'Quick win'	Short term	Medium term	Long term	Public	Private	Public	Private
1.- Forts	✓	✓	✓			Lead	-	Lead	Service contract
2.- Monuments	✓	✓	✓			Lead	-	Lead	Service contract
3.- Villages (arrive and walk)	✓			✓		PPP		Support	Lead
4.- Old Goan Houses	✓		✓			PPP		Support	Lead
5.- Culinary	✓		✓			Support	Lead	Support	Lead
6.- Cultural Events		✓	✓			PPP		PPP	
7.- The Goa Multimedia Experience		✓		✓		Lead	-	-	Service contract
8.- Handicrafts				✓		PPP		Support	Lead

Short term: within 3 years

Medium term: 3 - 5 years

Long term: 5 years/ above

Nature Based Programs

★ Flagship programs ⚡ Quick Wins



1	Discovery River Cruises (EF) <i>Rivers Mandovi, Zuari, Sal and Chapora; Cumbarjua Canal</i>	★ ⚡	France
2	Agro tourism (spice farms/ homestays and agro farms) <i>In the areas of Molem, Ponda outskirts, Netravali and Quepem</i>	★ ⚡	Bolivia
3	Nature Sanctuaries (EF) <i>Bondla, Bhagvan Mahaveer, Netravali, Cotigao, Molem National Park and Dr. Salim Ali Bird Sanctuary</i>	⚡	Victoria
4	'Slow Movement' Wellness Centres <i>Divar; Also mainly around the hinterland under certified eco-friendly accommodation</i>	⚡	Spain
5	Nature Clusters (EF) <i>4 main clusters: one in each of the hinterland talukas: Satari, Dharbandora, Sanguem and Canacona</i>		Panama
6	Adventure & Sports Tourism <i>Bogmalo – Grande Island and its environs; Majorda for water based sports; Dudhsagar Base Camp and Vagueri hills Base Camp</i>		United Kingdom

Discovery river cruises



Product: Nature-based tourism	
Flagship programme	Quick wins
✓	✓
Timeframe: Short term (pilot project) and medium term (full scale development)	
Concept and objectives	<ul style="list-style-type: none"> Goa has an attractive – in terms of landscape and biodiversity – network of rivers with a network of jetties, from the erstwhile Portuguese regime, which were used as pick up points for people from the interior travelling to the cities. The programme envisages the launch of river cruises which offer 'Discovery' trips along these inland waterways with the possibility of stopping at multiple parts along the way to explore the hinterland. The river cruises and the enhancement of tourism based on the development of the rivers of Goa will take away the pressure on the beaches and will attract new demand.
Accommodation needs	<ul style="list-style-type: none"> There is the possibility that some boats are equipped with cabins and offer tourists the possibility to stay overnight
Market strategy	<ul style="list-style-type: none"> Tourists (domestic and foreign) and resident population Day and overnight visitors (including day cruise visitors)

Commercial strategy

- River cruises are as the most attractive way of discovering the different places, landscapes and peoples of the interior of Goa. There are various alternatives to visit the tourist attractions, from short journeys of a couple of hours to journeys lasting one to two days, with the possibility of staying overnight on the boat.

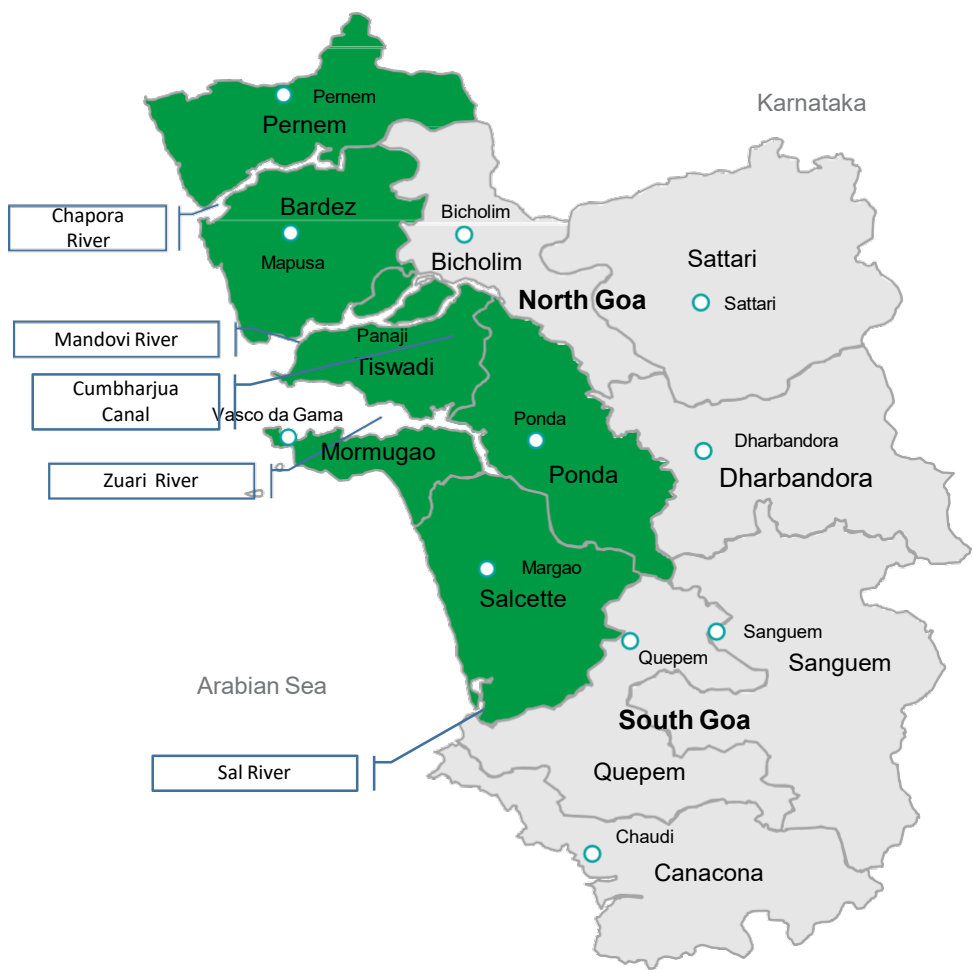
Implementation strategy

- Launch the rivers Mandovi, Zuari and Chapora – and the Cumbarjua Canal – as pilot phase to showcase results and raise awareness. The programme will implement good practices in the process and will replicate the experience along other major navigable rivers in Goa.

Key issues to be addressed

- Review of the CRZ Regulations to facilitate growth of tourism on the banks of rivers.
- Review of the 'No Development Zones' to facilitate development of existing jetties with minimum infrastructure for tourism activities (extending up to 100m from the river banks or the width of the river.
- Unparalleled growth of Mangroves in private paddy fields beyond the banks of the rivers is another issue that needs to be attended.
- Address the potential environmental impacts associated with the development of the programme
- Public-Private Partnerships

Discovering the destination in a relaxed manner on a vessel taking in the lush greens, calm waters and varied fauna



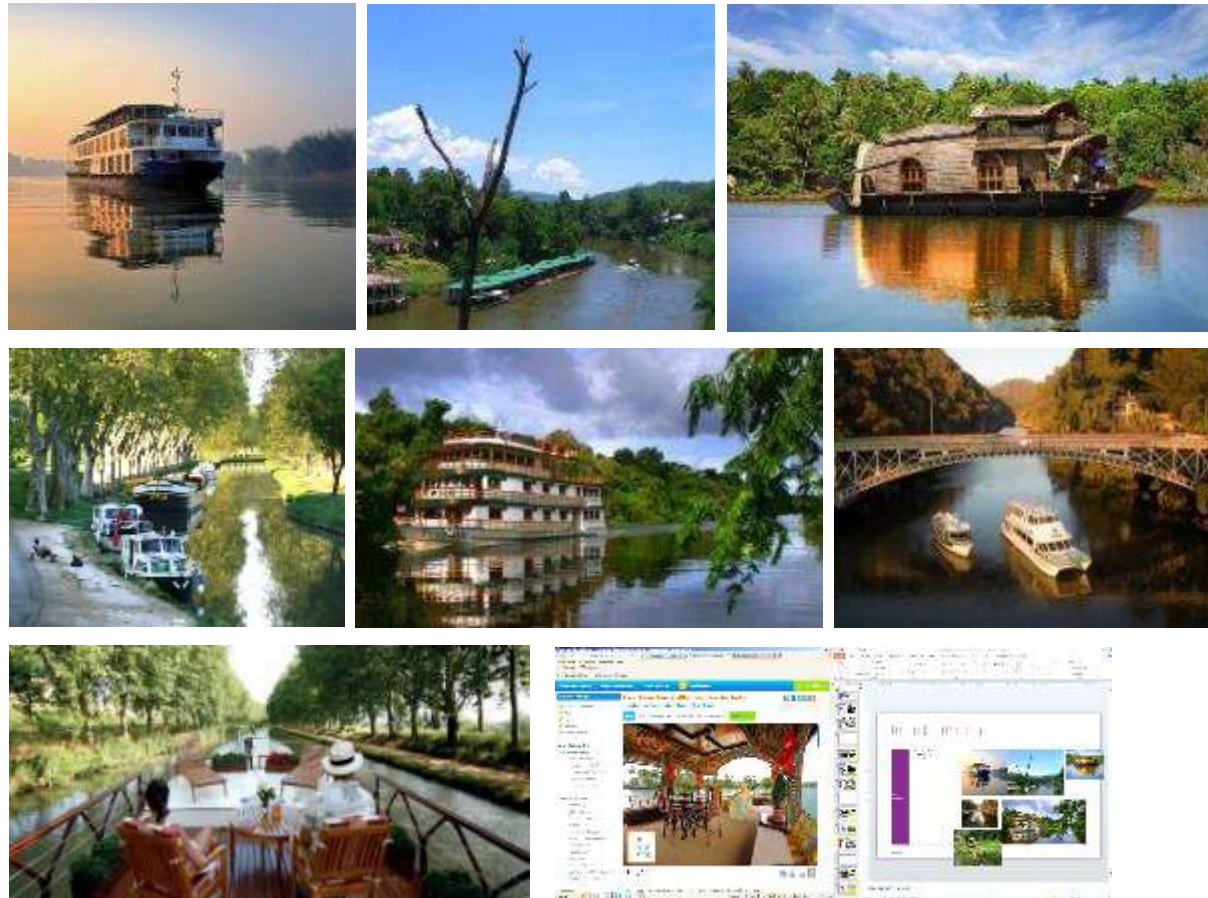
Potential locations	Facilities and land requirements
Rivers Mandovi, Zuari, Sal and Chapora; Cumbarjua Canal	Jetties and navigation routes
Description and tasks	
<ul style="list-style-type: none"> Boats should be of small and medium size (up to 20 passengers) to avoid mass tourism for this product and of the hinterlands territory Restore and facilitate the use of old Portuguese jetties and other minor ports in order to create a network of stops to explore nearby locations and enjoy activities and experiences Identify accommodation units (resorts, homestays, etc.) where tourist can stay overnight if their boat does not provide accommodation Create specific itineraries for tourist exploration of the hinterlands using boat as a main vehicle and then ground transportation as a complement in some stopovers. Establish quality standards for boats and for on board services Enforcement of waste management and non polluting practices 	

Benchmark and character images



"Best Practices"

- Canal du midi, France (www.canalous-canaldu midi .com.fr)
- Kerala, India





Agro tourism (spice farms/ homestays and agro farms)

Product: Nature-based tourism	
Flagship programme	Quick wins
✓	✓
Timeframe: Short term	
Concept and objectives	<ul style="list-style-type: none">• The programme is about the development and marketing of the Agrotourism concept in Goa. It is a form of niche tourism (which already exist in Goa) and consist mainly of visits to spice farms, herbariums, cashew and coconut plantations, rice fields, among others. Apart from the visits, it also includes a wide variety of activities ranging from buying produce direct from a farm stand to overnights and short stays.• Agrotourism is aimed at enhancing the local culture, lifestyle and population of Goa and can be a solution in moving the tourist away from the overcrowded beaches
Accommodation needs	<ul style="list-style-type: none">• Accommodation in farms (homestays) should be in low rise and low density premises, in order to blend with the environment around it.
Market strategy	<ul style="list-style-type: none">• Mainly domestic and foreign tourists• Day and overnight visitors (including day cruise visitors)

Commercial strategy

- For those seeking for truly authentic touristic experiences, those who want to be integrated in the local community, going to villages, seeing how people live, share meals with them, better understand their culture

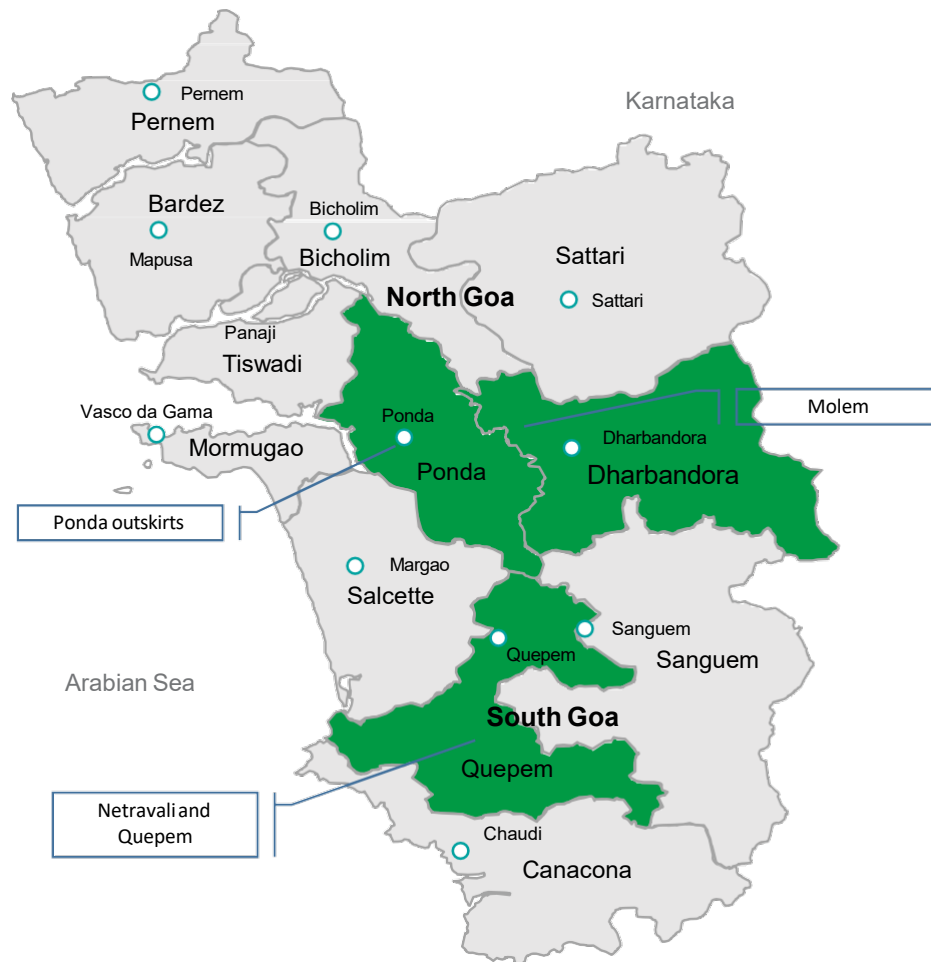
Implementation strategy

- Progressive implementation across the territory starting with the adaptation and improvement of those tourism products that are currently being exploited in Goa. In a next phase, the programme will continue with the development and adaptation of assets that are lesser known or whose potential is to be realised.

Key issues to be addressed

- There is no an adequate policy for farm land tourism. Current laws are restrictive with regard to development of tourism activities in farm or orchard lands.
- The present regulation and Act should be replaced by a more proactive and practical one.
- Licenses for the touristic exploitation of the attractions
- Quality standards and certifications
- Tourist guide training programmes
- Support in the promotion

Offering the real life of the Goans to those tourists who are eager to discover their culture



Potential locations	Facilities and land requirements
In the areas of Molem, Ponda outskirts, Netravali and Quepem	-

Description and tasks
<ul style="list-style-type: none"> • Adaptation and improvement of products that are currently starting to be exploited (in the case of some spice farms and herbariums) • Development and adaptation for tourism uses of some lesser known assets or assets that are not exploited at present (example: rice fields south of Goa) • Grouping of products either by proximity, product type or condition, for the definition of different circuits or itineraries • Development or operational implementation of the basic infrastructure that permits connecting assets in each circuit • Development of the supply of accommodation, F&B and other services that complement tourism

Benchmark and character images



"Best Practices"

- In Goa: Atreya Vedic Spice Farm, Sahakari Spice Farm, Pascoal Spice Village, Sai Herbarium
- Circle Farm Tour, Canada (www.circlefarmtour.com)
- Chalalán Ecolodge, Bolivia (www.chalalan.com)
- Community Tourism Dominicana, Dominican Republic



Nature Sanctuaries



Product: Nature-based tourism	
Flagship program	Quick wins
	✓
Timeframe: Short term	
Concept and objectives	<ul style="list-style-type: none"> Goas has several nature sanctuaries, located in the hinterlands, in the Ghats. The main concept consists in providing first class facilities and experiences in these Sanctuaries to increase the number of visitors and potentially overnight stays The overall objective is to generate more incomes for the Ministry of Forestry in charge of these Sanctuaries, that can be used for the further conservation of these protected areas; as well as to sources of incomes for local stakeholders living in the area near the Sanctuaries.
Accommodation needs	<ul style="list-style-type: none"> Two levels of accommodation: affordable and upscale. Typologies: eco lodges, eco cottage, tented and luxury tented camps, camping zones and low density branded resorts for high-end markets No need to be located within the protected area but nearby, though there are international examples of lodges located within the protected area

Market strategy	<ul style="list-style-type: none"> Tourists (domestic and foreign) and resident population Day and overnight visitors (including day cruise visitors)
Commercial strategy	<ul style="list-style-type: none"> Programme that helps improve the tourist experience at the destination through the offering (as a complement to coastal tourism) of a 1 to 2 day break to discover the biodiversity of an inner area that remains unspoiled. Longer stays for specialised group with special interest in fauna and flora.
Implementation strategy	<ul style="list-style-type: none"> Start with more visited sanctuaries and/or with those located within the nature clusters.

Key issues to be addressed

- Consultation and agreement with the entity in charge of sanctuaries
- Identify best international and national best practices
- Integrated approach to include benefits for local stakeholders
- Ensure funding for these initiatives

Based around local fauna/ flora with an orientation towards environmental promotion



Potential locations	Facilities and land requirements
Bondla, Bhagvan Mahaveer, Netravali, Cotigao, Molem National Park and Dr. Salim Ali Bird Sanctuary	N/A
Description and tasks	
<ul style="list-style-type: none"> • Create interpretation centres (edutainment) to better understand nature: turtle conservation centre, dolphins and marine life, bats, birds, fauna and flora of special interest in Goa • Eco-tourism activities inside Protected Areas should be as per the prevalent guidelines of the Ministry of Forest, Environment and Climate change, New Delhi • Establish list of needs for each sanctuary related to access, basic infrastructure (electricity, water, mobile coverage at welcome point) and parking, toilets, food & beverage; transportation within the sanctuary (of needed), signposting, specially abled access, guided tours, walking trails if applicable • Develop campaigns and animation to raise the public and local awareness about the need to protect nature. • Sponsorship to plant endemic trees in special-interest zones and protected areas, etc. 	

Benchmark and character images



"Best Practices"

- In Goa: Bondla Sanctuary; Bhagvan Mahaveer Sanctuary; Cotigao Sanctuary
- Werribee Open Zoo



Wellness destination centers: Goa as the "Center for the Slow Movement" Culture



Product: Coastal tourism	
Flagship programme	Quick wins
	✓
Timeframe: Short term	
Concept and objectives	<ul style="list-style-type: none"> Wellness tourism is a must have product for the destination and Goa is already offering a spa and wellness offer through its resorts and hotels, but should be further developed in the hinterland. The aim of the programme is to upgrade products that have developed on a low-profile basis as well as adding new facilities. New centres (stand-alone spas, resort spas) should necessarily target high-end customers who choose to go to a place for its good quality wellness services and good infrastructure facilities.
Accommodation needs	<ul style="list-style-type: none"> World-renowned spa brands and a variety of ecological and nature-based products with exotic and Goan flavours should be included in the offer
Market strategy	<ul style="list-style-type: none"> Mainly domestic and foreign tourists Day and overnight visitors (including day cruise visitors)

Commercial strategy

- Wellbeing travel and health motivations are gaining momentum due to the fast pace of life in many cities. This tourism product is chosen by health-conscious consumers seeking to enhance their well being through their travel experiences.

Implementation strategy

- Gradual implementation, mainly in the hinterland, starting with the adaptation and improvement of the current supply. In a next phase, the programme will continue with the development of new facilities, focusing on the luxury segment.

Key issues to be addressed

- Differentiate Goa from other tourism destinations in India and other international competitors.

Wellness destination centers: Goa as the "Center for the Slow Movement" Culture



The "Slow Movement" Culture concept applied to Wellness in Goa

The **slow movement** advocates a cultural shift toward slowing down life's pace. It began in 1986. Over time, this developed into a [subculture](#) in other areas, like the [Cittaslow](#) organisation for "slow cities". The "slow" [epithet](#) has subsequently been applied to a variety of activities and aspects of culture.

[Geir Berthelsen](#) and his creation of The World Institute of Slowness presented a vision in 1999 for an entire "slow planet" and a need to teach the world the way of slowness. [Carl Honoré](#)'s 2004 book, *In Praise of Slowness*, first explored how the Slow philosophy might be applied in every field of human endeavour and coined the phrase "slow movement". The [Financial Times](#) said the book is "to the Slow Movement what *Das Kapital* is to communism Honoré describes the Slow Movement thus:

"It is a cultural revolution against the notion that faster is always better. The Slow philosophy is not about doing everything at a [snail](#)'s pace. It's about seeking to do everything at the right speed. Savoring the hours and minutes rather than just counting them. Doing everything as well as possible, instead of as fast as possible. It's about quality over quantity in everything from work to food to parenting."

Professor [Guttorm Fløistad](#) summarises the philosophy, stating:

"The only thing for certain is that everything changes. The rate of change increases. If you want to hang on you better speed up. That is the message of today. It could however be useful to remind everyone that our basic needs never change. The need to be seen and appreciated! It is the need to belong. The need for nearness and care, and for a little love! This is given only through slowness in human relations. In order to master changes, we have to recover slowness, reflection and togetherness. There we will find real renewal."¹

The slow movement is not organised and controlled by a single organisation. A fundamental characteristic of the slow movement is that it is propounded, and its momentum maintained, by individuals who constitute the expanding global community of Slow. Its popularity has grown considerably since the rise of [slow food](#) and Cittaslow in [Europe](#), with slowness initiatives spreading as far as [Australia](#) and [Japan](#).

Goa's lifestyle – "susegad" – paired with existing wellness centres that offer treatments which philosophy matches the Slow Movement" culture, creates a framework under which a Goa's Wellness concept could be included.

The concept is broad enough to include many of the traditional Indian therapies such as Ayurveda, Yoga and others; as well as any other treatments. And it would help position Goa.

Wellness destination centers: Focus on new development in the hinterlands



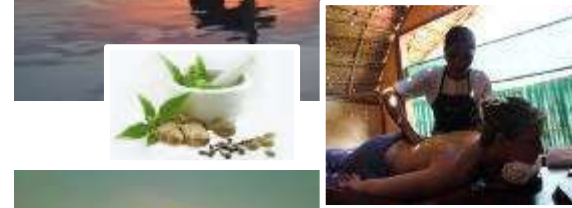
Potential locations	Facilities and land requirements
Mainly around the hinterland under certified eco-friendly accommodation, including Divar	-
Description and tasks	
<ul style="list-style-type: none"> • Definition and implementation of wellness standards for the current and future centres' offering (stand-alone spas, resort spas) • Improve existing products • Build new developments for the new offering • Encourage the establishment of schools and centres for training staff in different disciplines and activities promoted in the programme • Develop a new complementary offering associated to wellness and nature tourism (tourists and visitors may enjoy walks, see rivers, wetlands, great views, birds, waterfalls, mountains and more) 	

Benchmark and character images



"Best Practices"

- Six Senses Resorts & Spa (Thailand)
- Banyan Tree Resorts & Spas (Singapore)
- Devaaya Ayurveda & Nature Cure Centre
- Sha Wellness Resort & Clinic, Spain
- Sanda Retreats (includes Yoga activities)



Nature clusters



Product: Nature-based tourism	
Flagship programme	Quick wins
Timeframe: Medium term	
Concept and objectives	<ul style="list-style-type: none"> It is a concept that arises from combining one or various key assets with other natural or cultural attractions located nearby. The clustering of assets contributes to increasing its attractiveness, generating more visits and delaying the time of the visits. The accommodation offering gives visitors the opportunity to stay overnight in the area The cluster will be characterised by maintaining a set of shared services.
Accommodation needs	<ul style="list-style-type: none"> Two levels of accommodation: affordable and upscale. Typologies: eco lodges, eco cottage, tented and luxury tented camps, camping zones and low density branded resorts for high-end markets
Market strategy	<ul style="list-style-type: none"> Tourists (domestic and foreign) and resident population Day and overnight visitors (including day cruise visitors)
Commercial strategy	<ul style="list-style-type: none"> Programme that helps improve the tourist experience at the destination through the offering (as a complement to coastal tourism) of a 2 or 3 day break to discover the biodiversity of an inner area that remains unspoiled

Implementation strategy

- Launch pilot cluster with base in Molem village (Satari) and the combination of: Bhagwan Mahaveer Sanctuary, Dudhsagar waterfalls, Tambdi Surla Temple, Atreya Vedic Spice Farm – and add one man-made attraction (i.e. Forest Adventure Park for families).
- After the pilot phase the programme will implement good practices in the processes and will replicate the experience in other talukas.

Key issues to be addressed

- Alignment with the regional plan. Present laws which restrict construction of hotels in orchard and agricultural land should be revised and adapted for specific high interest projects. Though it is necessary to protect the hinterland from over exploitation, any limited exploitation that is permitted should allow the investor, under specific standards, to create a world class facility and not a ramshackle hut or a tent, where tourists feel unwelcome.
- Improvement of the key assets, as well as of other natural or cultural assets that are part of the cluster
- Labels and quality certifications
- Ecotourism goes one step further and contributes to reduce the negative impacts of tourism by developing products, activities and facilities that safeguard and enhance local environments, biodiversity and culture.

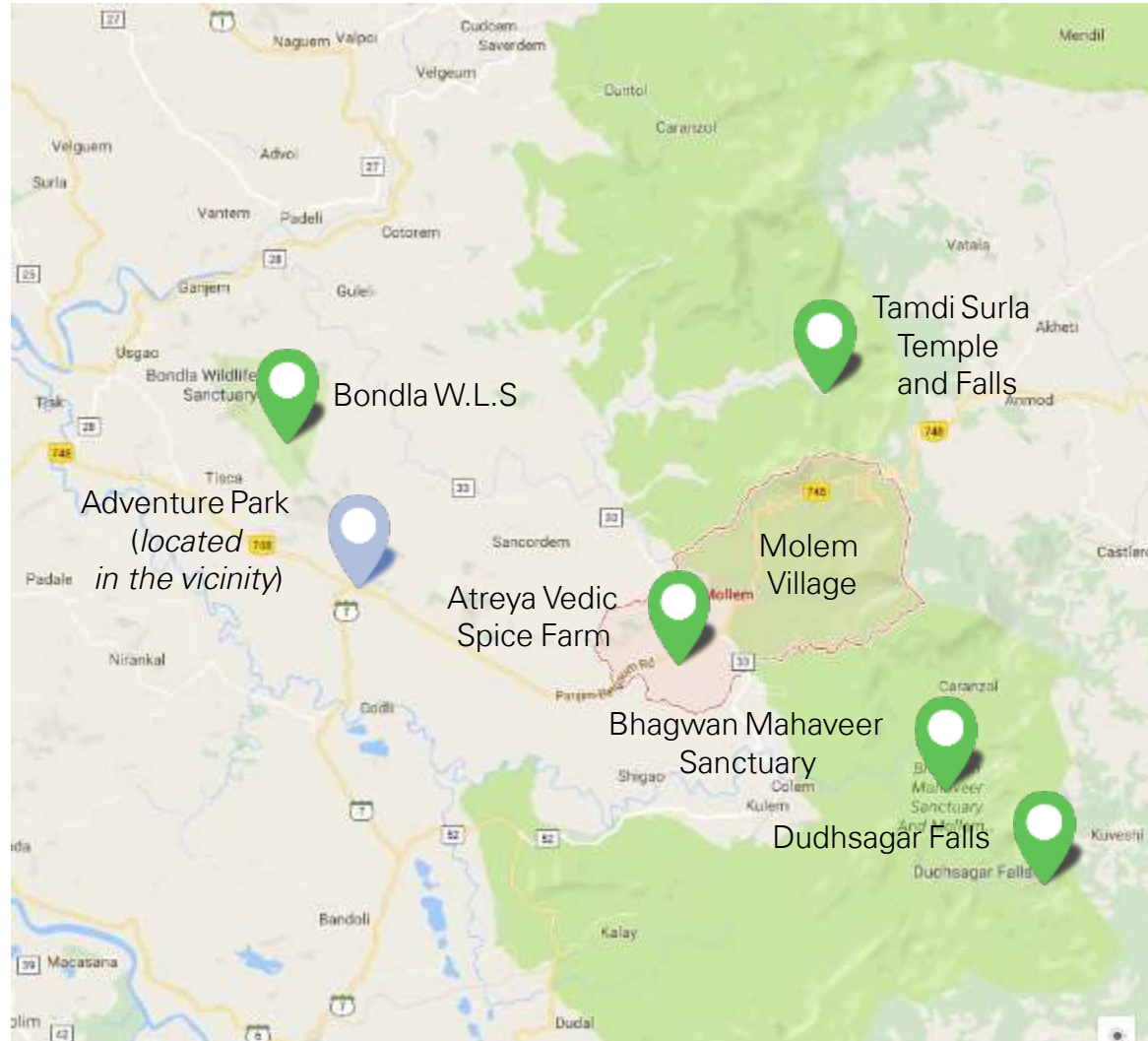
Nature-based hubs located in the hinterland comprising nature and culture assets, man-made attractions and accommodation



Potential locations	Facilities and land requirements
4 main clusters: one in each of the hinterland talukas: Sattari, Dharbandora, Sanguem and Canacona	Specified in subsequent slides

Description and tasks
<ul style="list-style-type: none"> The concept of nature clusters is not limited to nature assets or to the existence of nature sanctuaries, through main activities to be practiced in the nature cluster should be focused on the use of nature: sanctuary visit, sport activities, learning activities, agro farms, etc. The cluster should integrate other types of activities and experiences that can be used in short distance (up to one hour), such as cultural visits and/or activities; wellness treatments; etc. The Government could employ innovative financing methods, e.g. crowd funding to develop the unexplored Goan hinterland for greater economic benefits Create one adventure park, preferably in the Dharbandora taluka, with multiple activities for different age groups, while being respectful of nature and the environment (including features such as tree top adventure park, sliding, slackline and zip line). This will constitute the major entertainment facility in the hinterlands. Eco-tourism activities inside Protected Areas should be as per the existing guidelines of the Ministry of Forest, Environment and Climate change, New Delhi Develop ecological mode of transports such as electric bicycles and electric quad-bikes.

Nature Cluster – Pilot project zoom in



Pilot project description

The Pilot project will have its base in Molem Village since it has an accommodation offer today (e.g. Dudhsagar Spa Resort) and includes a mix of nature, culture and entertainment based activities and attractions.

Visits to this cluster could still be made on a Day Trip basis, however the concept is to generate enough activities for 2 – 3 days visits which at the same time gives the opportunity for accommodation.

The cluster will be characterised by maintaining a set of shared services.

Benchmark and character images



"Best Practices"

- In Goa: Bondla Sanctuary; Bhagvan Mahaveer Sanctuary; Dudhsagar Water Falls; Tambdi Surla Temple
- In Goa: Eco Cottage Wildernest Nature Resort (accommodation & guided activities such as trekking trails)
- Panama Rainforest Discovery Centre (www.pipelineroad.org)
- Night Safari (www.nightsafari.com.sg)
- Werribe Open Zoo (<http://www.zoo.org.au/werribee>)
- Monte Tamaro
- Hiking routes in Europe
- Bali: A wide variety of tourism products including water activities and nature parks have been developed to cater to a large set of tourists.
- Tented Camps/ camping (<http://france.huttopia.com/en>)
- Alila Resorts
- Certification: Rainforest Alliance (<http://www.rainforest-alliance.org/es>)



Adventure & Sports tourism



Product: Nature-based tourism	
Flagship programme	Quick wins
Timeframe: short term	
Concept and objectives	<ul style="list-style-type: none"> Adventure sports is an area which needs to be developed especially in the hinterland. This programme aims to create multisport destinations with base camp offering accommodation, Food & Beverage and learning centres. In addition, there is a need to improve already existing experiences along the coast by upgrading products, facilities and basic infrastructures, staff training and introducing security regulations. Creation of a network of hiking and biking trails in each main hinterland taluka, using picturesque landscapes and interesting nature sports.
Accommodation needs	<ul style="list-style-type: none"> Typologies: eco lodges, eco cottage, tented and luxury tented camps, camping zones and low-density branded resorts for high-end markets
Market strategy	<ul style="list-style-type: none"> Tourists (domestic and foreign) and resident population Day and overnight visitors (including day cruise visitors)

Commercial strategy

- The range of options is improved and extended for those travellers who participate or enrol in leisure and recreation sports. Most active experiences include: hiking, rafting, bike parks, quad-bike expeditions, among others.

Implementation strategy

- Launch of a project pilot for a multisport destination based in Molem village (Satari). The implementation actions should be carried out simultaneously with the pilot project of the Nature Clusters programme.

Key issues to be addressed

- Review of the Tourist Trade Act 1982, which was deemed inadequate to deal with various situations that have arisen – consider the need to amend or replace in consultation with the tourism stakeholders.
- Address the potential environmental impacts associated with the development of the program - 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 of lower environmental value.

Adventure & Sports tourism



Potential locations	Facilities and land requirements
Pilot projects: Bogmalo – Grande Island and its environs for scuba diving; Majorda for water based sports; Dudhsagar Base Camp and Vagueri hills Base Camp; Selaulim, Amthane and Anjunem dams	N/A
Description and tasks	
<ul style="list-style-type: none"> • Determine the list of adventure and sports tourism that are present or could be developed in Goa. Prepare and activity calendar specifying key annual events. • Establish minimum safety and general operations standards for each type of practice • Provide certification labels for both companies and individuals (guides and monitors) • Creation of signposted and secured trekking routes in the mountains like 'Hiking Trails' in Europe. Developing of a network of hiking and biking trails in each main hinterland taluka using picturesque landscapes and interesting nature sports. • Creation of cycle trails near selected rivers (Mandovi, Zuari, Chapora) to discover natural and cultural aspects of the hinterland. Cycle trails can also be developed within nature parks and sanctuaries (optional). • Development of nature sport trails for mountain bikes, quads, motorbikes, etc. in order to develop the practice and contain environmental impacts. Identify the most degraded areas in order to develop bike & enduro parks (optional). • Promotion of scuba diving in Goa emphasizing safety standards • Creation of standards and training of guides emphasizing safety issues 	

Benchmark and character images



"Best Practices"

- Mountain Biking Routes – 7 Stanes, United Kingdom
- Salou and Cambrils, Catalonia, Spain: A large complementary offer to coastal tourism, including adventure. For the last 2-3 years both Salou and Cambrils have been extremely focused on developing sport tourism and now receive athletes and professional teams from Europe, especially during low season





Nature Based Programs - Initial investment concepts

Estimations refer to the costs of building one unit/ facility

Programs	cost concept	Unit of measure	Cost per unit (INR)	Number of units	Total Cost (INR Cr.)	Financial Model	
						Public	Private
1.- Discovery River Cruises (EF)	Network of stops (jetties and small ports for cruise ships)	Jetties/ Port	68,810,000	1	6.88	100%	
2.- Agrotourism (Spice farms and homestays and walks in agro farms)	Improvement of Farms	Lump sum	1,720,250	N/A	0.17	50%	50%
	Improvement of Homestays	Lump sum	1,032,150	N/A	0.1	50%	50%
3.- Nature Sanctuaries (EF)	Adaptation for tourism use + basic facilities: Welcome centre, ticketing, souvenir shop, F&B outlet, toilets, parking, signposting within premises, etc.	Lump sum	4,128,600	N/A	0.4	100%	
4.- 'Slow Movement' Wellness Centres	Resort/ Centre	Keys	2,752,400	50	13,76		100%
5.- Nature Cluster (EF)	Adaptation for tourism use and improvement of key assets that form part of the cluster	Lump sum	55,048,000	N/A	5.5	100%	
6.- Adventure & Sports Tourism	Man-made multisport destination/ Adventure Park*	Unit	206,430,000	1	20.64		100%

These costs do not include the cost of land

(*) Investment is subject to specific project conditions and may vary largely depending on location, site preparation, park construction works and development program

Nature Based Programs - Estimated initial investment (phased over the next 10 years)



N-B Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Discovery River Cruises (EF)	5 Jetties/ Small ports	34.4	17.2	17.2	-	-	-	-	-	-	-	-
2.- Agrotourism (Spice farms and homestays and walks in agro farms)	10 Farms + 1,000 homestays	104.9	35.0	35.0	35.0	-	-	-	-	-	-	-
3.- Nature Sanctuaries (EF)	6 Nature Sanctuaries	2.5	0.8	0.8	0.8	-	-	-	-	-	-	-
4.- 'Slow Movement' Wellness Centres	5 Resorts/ Centres	68.8	22.9	22.9	22.9	-	-	-	-	-	-	-
5.- Nature Cluster (EF)	4 Clusters	22.0	-	-	7.3	7.3	7.3	-	-	-	-	-
6.- Adventure & Sports Tourism	1 Man-made park	20.6	10.3	10.3	-	-	-	-	-	-	-	-
Total N-B Programs Budget		253.3	86.3	86.3	66.1	7.3	7.3	-	-	-	-	-
(%)		100%	34.06%	34.06%	26.09%	2.90%	2.90%	-	-	-	-	-

Nature Based Programs - Reinvestment (1.5% of estimated initial investment)



N-B Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Discovery River Cruises (EF)	5 Jetties/ Small ports	4.1	-	-	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
2.- Agrotourism (Spice farms and homestays and walks in agro farms)	10 Farms + 1,000 homestays	12.6	-	0.5	1.0	1.6	1.6	1.6	1.6	1.6	1.6	1.6
3.- Nature Sanctuaries (EF)	6 Nature Sanctuaries	0.3	-	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4.- 'Slow Movement' Wellness Centres	5 Resorts/ Centres	8.3	-	0.3	0.7	1.0	1.0	1.0	1.0	1.0	1.0	1.0
5.- Nature Cluster (EF)	4 Clusters	2.0	-	-	-	0.1	0.2	0.3	0.3	0.3	0.3	0.3
6.- Adventure & Sports Tourism	1 Man-made park	2.5	-	-	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Total N-B Programs Budget		29.7	-	0.9	2.6	3.6	3.7	3.8	3.8	3.8	3.8	3.8
(%)		100%	100%	-	2.96%	8.70%	12.04%	12.41%	12.78%	12.78%	12.78%	12.78%

Nature Based Programs - Total estimated initial investment + Reinvestment

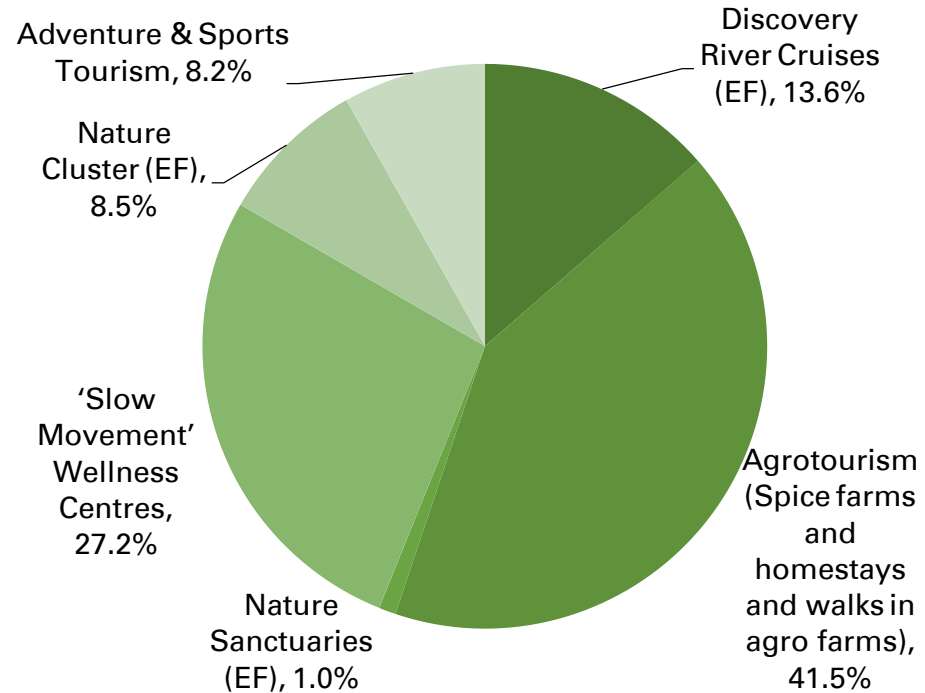


N-B Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Discovery River Cruises (EF)	5 Jetties/ Small ports	38.5	17.2	17.2	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
2.- Agrotourism (Spice farms and homestays and walks in agro farms)	10 Farms + 1,000 homestays	117.5	35.0	35.5	36.0	1.6	1.6	1.6	1.6	1.6	1.6	1.6
3.- Nature Sanctuaries (EF)	6 Nature Sanctuaries	2.8	0.8	0.8	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4.- 'Slow Movement' Wellness Centres	5 Resorts/ Centres	77.1	22.9	23.3	23.6	1.0	1.0	1.0	1.0	1.0	1.0	1.0
5.- Nature Cluster (EF)	4 Clusters	24.0	-	-	7.3	7.4	7.6	0.3	0.3	0.3	0.3	0.3
6.- Adventure & Sports Tourism	1 Man-made park	23.1	10.3	10.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Total N-B Programs Budget		283.0	86.3	87.1	68.7	10.9	11.0	3.8	3.8	3.8	3.8	3.8
(%)		100%	30.48%	30.79%	24.26%	3.86%	3.90%	1.34%	1.34%	1.34%	1.34%	1.34%

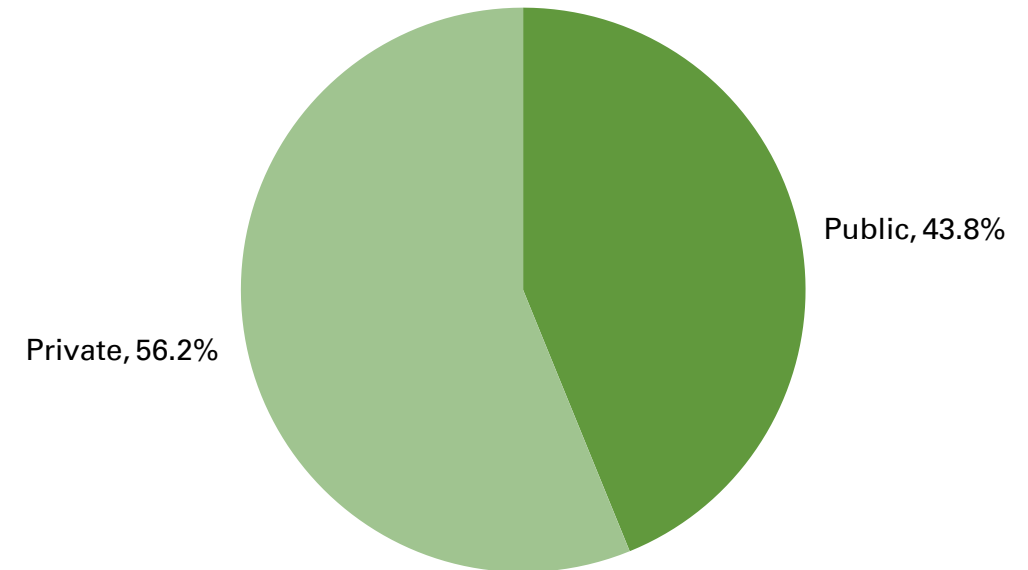
Nature Based Programs - Total estimated initial investment + Reinvestment



**Nature-based Budget
Total Distribution by Program**



**Nature-based Budget
Public Vs. Private**



Total expected cost
(over the next 10 years)
INR 283 Cr.

Nature Based Programs - Facility Management Recurrent Expenditures (2% of estimated initial investment)



N-B Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Discovery River Cruises (EF)	5 Jetties/ Small ports	5.5	-	-	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7
2.- Agrotourism (Spice farms and homestays and walks in agro farms)	10 Farms	Not Estimated										
3.- Nature Sanctuaries (EF)	6 Nature Sanctuaries	0.4	-	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4.- 'Slow Movement' Wellness Centres	5 Resorts/ Centres	Not Estimated										
5.- Nature Cluster (EF)	4 Clusters	2.6	-	-	-	0.1	0.3	0.4	0.4	0.4	0.4	0.4
6.- Adventure & Sports Tourism	1 Man-made park	Not Estimated										
Total N-B Programs Budget		8.5	-	-	0.7	0.9	1.0	1.2	1.2	1.2	1.2	1.2
(%)		100%	-	0.19%	8.44%	10.35%	12.07%	13.79%	13.79%	13.79%	13.79%	13.79%

Facility Management Recurrent Expenditures refers to maintenance, cleanliness and security of the facility
Private annual recurrent expenses related with Facility Management are not estimated



Nature Based Programs - Financing Options

Nature Based Program Initiatives					
Discovery River Cruises (EF)	Agro tourism (spice farms/ homestays and agro farms)	Nature Sanctuaries (EF)	Slow Movement' Wellness Centers	Nature Clusters (EF)	Adventure & Sports Tourism
<input type="checkbox"/> State and Central government support for development of rivers <input type="checkbox"/> Private participation in financing of individual projects	<input type="checkbox"/> State and Central government support for development of area <input type="checkbox"/> Private participation in financing of individual projects <input type="checkbox"/> Funding support can also be attained through hotel chains and multilateral organizations for developing model tourist experience destinations	<input type="checkbox"/> Central government support for funding <input type="checkbox"/> Private participation in financing of individual projects	<input type="checkbox"/> State government funding for development of the hinterland <input type="checkbox"/> Private participation in financing of individual projects	<input type="checkbox"/> State government support for funding <input type="checkbox"/> Central government support	<input type="checkbox"/> PPP funding through the BOOT model <input type="checkbox"/> Private participation in financing of individual projects



Nature Based Programs - Summary

Program	Implementation					Financing model		Operations model	
	Flagship program	'Quick win'	Short term	Medium term	Long term	Public	Private	Public	Private
1.- Discovery River Cruises (EF)	✓	✓	✓			PPP		Support	Lead
2.- Agrotourism (Spice farms and homestays and walks in agro farms)	✓	✓	✓			Support	Lead	Support	Lead
3.- Nature Sanctuaries (EF)		✓	✓			Lead	-	Lead	Service contract
4.- 'Slow Movement' Wellness Centres		✓	✓			Support	Lead	Support	Lead
5.- Nature Cluster (EF)				✓		PPP		PPP	
6.- Adventure & Sports Tourism			✓			Support	Lead	Support	Lead

Short term: within 3 years

Medium term: 3 - 5 years

Long term: 5 years/ above

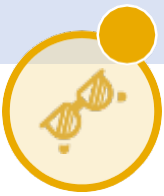
Leisure & Entertainment Programs

★ Flagship programs ⚡ Quick Wins



- | | | | |
|---|--|-----|-------------|
| 1 | Waterfront Promenades
<i>Panaji, Colva, Chapora, Old Goa and Mayem Lake</i> | ★ ⚡ | Switzerland |
| 2 | Family Entertainment District (inclusive of Themed Park)
<i>In the vicinity of the proposed Mopa airport</i> | ★ | Dubai |
| 3 | Gaming Cluster
<i>Organised gaming clusters along with shifting of the offshore casinos to the Chapora or Chicalim Bay</i> | ⚡ | Malaysia |
| 4 | Golf Courses
<i>1 in the hinterland/ 1 in vicinity of Mopa airport subject to space availability and Govt. norms</i> | | Mexico |

Waterfront promenades



Product: Leisure & Entertainment tourism	
Flagship program	Quick wins
✓	✓
Timeframe: Short term	
Concept and objectives	<ul style="list-style-type: none"> Goa is an important destination for coastal tourism. However, the major cities (including the capital) have not exploited their potential as coastal cities. Goa needs to 'open up to the sea and indeed its rivers' and to do so it must introduce the waterfront promenade concept, a public space that spreads along a section of the coastline and riverfront that is open to locals, visitors and tourists. It is expected that this concept will evolve in the long term and will become a pedestrian network that safely links the major landmarks or attractions of the city (markets, churches, public spaces).
Accommodation needs	<ul style="list-style-type: none"> The programme is not associated with accommodation. However, it is possible that, in the future, supply of accommodation generated along the waterfront promenades
Market strategy	<ul style="list-style-type: none"> Tourists (domestic and foreign) and locals Day and overnight visitors (including day cruise visitors)

Commercial strategy

- Waterfront cities with unique urban structure and programs that draw international attention

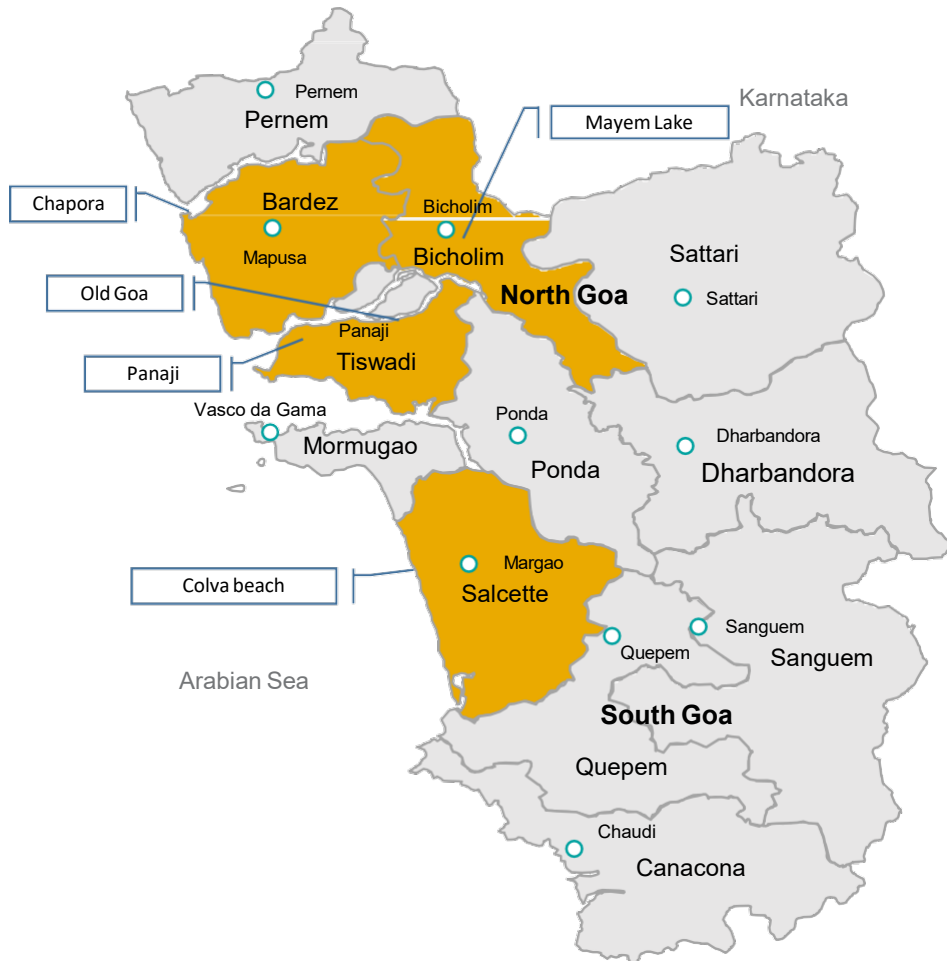
Implementation strategy

- Launch a pilot project in Panaji, using as a framework the recently-approved city masterplan.
- After the pilot project, the programme will implement good practices in the processes and will replicate the experience in other major cities along the coast and some river

Key issues to be addressed

- There is a masterplan approved for the development of Panaji city which already proposes a promenade along the coastline between Miramar and Dona Paula.
- Organise and regularise all the uses and activities along the length of the route. This could generate controversy and negative reactions against the plan

Enhancing tourism use and attraction for both locals and tourists



Potential locations	Facilities and land requirements
Panaji, Colva, Chapora, Old Goa and Mayem Lake	N/A

Description and tasks
<ul style="list-style-type: none"> • Panaji promenade: enhance tourism use and attraction for locals and tourists. Promote alternative means of transport like electric or non electric bicycles • Old Goa: review promenade behind archaeological museum Colva Beach next to Margao • Mayem Lake: for weekend excursions • Development concept: parking facilities, multiuse kiosks, themed areas for activities, bike and jogging line, markets, kids areas, fish restaurant cluster, etc. • Offer 'streetmosphere' as it creates and forms the character of a place, development and animates repeat-visits and brings people to the streets, locals and tourists alike

Benchmark and character images

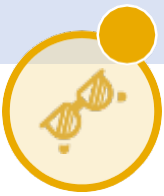


"Best Practices"

- Playa de Palma
- Paseo Marítimo de Barcelona
- Victoria & Alfred Waterfront, South Africa
- Caudan Waterfront, Mauritius
- Lemman Lake, Lausanne, Switzerland



Family entertainment district



Product: Leisure & Entertainment tourism	
Flagship program	Quick wins
✓	
Timeframe: Long term	
Concept and objectives	<ul style="list-style-type: none"> Goa needs a large and attractive leisure place for visitors and tourists — located somewhere between the beach tourism and the hinterland tourism so that all the entertainment be concentrated in the form of a mixed-use entertainment destination including: themed park, water park, theatre, cinemas, event place, convention centre, among others. In order to be completely self sufficient, this cluster will also include a wide range of F&B options, retail, hotels and resorts. These will be an attraction which will help to take the tourists away from the beaches and reduce the pressure thereon.
Accommodation needs	<ul style="list-style-type: none"> Mixed resorts and hotels
Market strategy	<ul style="list-style-type: none"> Tourists (domestic and foreign) and resident population Day and overnight visitors

Commercial strategy

- This area is home to the top attractions entertainment and leisure attractions for families in Goa. No matter what time of day or season, the Family Entertainment District is the home to something big
- Main target: domestic tourism

Implementation strategy

- Consider phasing of the project – reserve land for future expansions
- It is a single project, not to be duplicated in different locations.

Key issues to be addressed

- Selection of the most suitable place to locate the project
- Infrastructure improvements envisaged – road access and transportation. Straight connection from/ to the airport will be needed
- Address the potential environmental impacts associated with the development of the program - 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 of lower environmental value.

A leisure & entertainment hub for the family offering a themed park, F&B, shopping an accommodation



Potential locations	Facilities and land requirements
In the vicinity of the proposed Mopa airport	N/A

Description and tasks
<ul style="list-style-type: none"> • Water, adventure and amusement parks located in the hinterland maybe in Mayem or in the vicinity of the proposed Mopa airport • These attractions should be designed and managed by an international brand • Introduction of retail and F&B offer as well as accommodation: mixed-resorts and hotels • Offer arcades that integrate latest high- tech gaming machines as well as traditional games such as bowling • The high-tech offer needs to be sophisticated and up to the latest technological advances to offer unique new experiences that attract young people such as customized cinema rooms and screens for video gaming • Potential introduction of a motor park (to be assessed) with a mix of karting, running track for motor bikes

Benchmark and character images



"Best Practices"

- Wild Wadi, Dubai
- Yas Waterworld, Abu Dhabi
- Port Aventura, Spain



Gaming cluster



Product: Leisure & Entertainment tourism	
Flagship program	Quick wins
	✓
Timeframe: Short term	
Concept and objectives	<ul style="list-style-type: none"> In recent years, Goa has become as a strong tourist destination for casinos, primarily attracting domestic and Middle Eastern tourists. Gambling represents the motivation for travel for a specific segment of tourists and a leisure activity for others. Additionally, casinos represent an important source of revenue for the Government. However, casinos are regarded as a bad influence to society in general and for young people in particular. They also 'distort' the landscape of one of Goa's most interesting coastal landscape. The programme proposes relocation, inland as part of a cluster rot to another bay.
Accommodation needs	<ul style="list-style-type: none"> On shore casinos could be part of 5* hotels while offshore casinos might offer a number of accommodation units as part of the boat facilities
Market strategy	<ul style="list-style-type: none"> Tourists (domestic and foreign) and resident population Day and overnight visitors (including day cruise visitors)

Commercial strategy

- Goa will offer a lively and properly-organized cluster on/off shore cluster located outside of Panaji city

Implementation strategy

- The relocation proposal, either further inland or on floating casinos in the bays of Chapora or Chicalim should be carried out in a planned and progressive way. The first step should be to stop the approval of new licences and subsequently provide a margin (2 to 5 years) for casinos to relocate.

Key issues to be addressed

- Keeping the gaming activity as a major source of income and an attraction for this tourism, while controlling and mitigating its negative image?
- Not to be mixed with any other types of entertainment and leisure activities
- Casinos are seen as a negative influence on society in general and youth in particular.
- There is also opposition to the so called offshore casinos, which refuse to go onshore.

A proper organized on/ off shore cluster located outside of Panaji city



Potential locations	Facilities and land requirements
Organized gaming clusters along with shifting of the offshore casinos to the Chapora or Chicalim Bay	N/A

Description and tasks
<ul style="list-style-type: none"> Gaming could remain one important draw for some tourism segments and a complementary leisure activity for other tourists Gaming should be relocated in one specific place, outside of Panaji city, creating an organized cluster: proper parking, shopping and F&B facilities, potentially lodging facilities; people access, control, safety, cleanliness and maintenance of the whole area. Potential relocation: Chapora Bay, creating a specific ground infrastructure with international standards and in organized way, catering for the special needs of gaming

Benchmark and character images

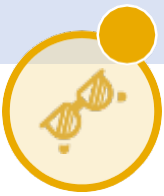


"Best Practices"

- Genting Highlands, Malaysia
- Macau Casino District



Golf courses



Product: Leisure & Entertainment tourism	
Flagship program	Quick wins
Timeframe: Long term	
Concept and objectives	<ul style="list-style-type: none"> The aim of the programme is not to turn Goa into a renowned golf destination, but to offer complementary golf activities to tourists that demand it as a secondary activity. Golf courses need to be developed so as to raise the quality and the standard to the tourists visiting Goa – this kind of product is in line with the need of attracting higher end tourists. However, their locations have to be well thought out and an assessment on the environmental impact should be carried out. The construction must be carried out under the strictest standards of sustainability and respect for the natural environment.
Accommodation needs	<ul style="list-style-type: none"> The development of golf courses should be associated (where possible) with international hotel brands
Market strategy	<ul style="list-style-type: none"> Mainly aimed at international tourists - the main potential for growth lies in the aging population, which is growing in size in most developed countries

Commercial strategy

- Supply golf activities as a complement to coastal, cultural or nature tourism (for example, someone on a beach holiday playing a round during their vacation).

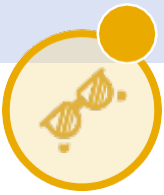
Implementation strategy

- Launch of a first pilot project in the areas near Mopa airport. Preferably launched in coordination with the construction of the adjacent hotel.
- After the pilot phase the programme will implement good practices in the processes and will replicate the experience in the hinterland

Key issues to be addressed

- In addition to the 9-hole golf course at the Lalit hotel in South Goa, another 9-hole golf course is already planned with the Four Seasons hotel next to Tiracol Fort
- Construction of a golf course with due regard to the Goan landscape and environs.
- Possible incompatibility with the land use scheme proposed in the Regional Plan.
- Address the potential environmental impacts associated with the development of the programme

An eco-friendly 9-hole golf course paired with a renowned international hotel brand



Potential locations	Facilities and land requirements
1 in the hinterland/ 1 in vicinity of Mopa Airport subject to space availability and Govt. norms	30 ha / 9-hole golf course
Description and tasks	
<ul style="list-style-type: none"> • Potentially develop 1 more eco-friendly 9-hole golf course associated with a renowned international hotel brand • As one existing 9-hole golf course is already operating with the Lalit hotel and another one is planned with the Four Seasons next to Tiracol Fort: • It is not clear as up to now if the market can absorb more than 3 golf courses in total , if international tourism does not develop strongly. Therefore it would be prudent to wait for the development of a golf course in the hinterland, giving priority to the potential development along with the leisure and entertainment cluster • In any case, the most advanced design and management technology and standards need to be used to make a full eco-friendly golf course. • In order to deal with potential opposition from the general public, it is important to prepare an awareness campaign explaining in details what is an eco-friendly golf course. 	

Benchmark and character images



"Best Practices"

- Mayokaba, Mexico
- The Ocean Course at Kiawah Island Golf Resort, South Carolina
- Fairmont Hotels & Resorts (www.fairmont.com/golf)
- Four Seasons Hotels & Resorts



Leisure & Entertainment Programs - Initial investment concepts



Estimations refer to the costs of building one unit/ facility

Programs	cost concept	Unit of measure	Cost per unit (INR)	Number of units	Total Cost (INR Cr.)	Financial Model	
						Public	Private
1.- Waterfront Promenades	Construction of 1 Km of Promenade	Linear metre	13,762	1,000	1.37	100%	
2.- Family Entertainment District (inclusive of Themed Park)	Themed Park + 3 Themed Hotels (950 keys) + 700 Serviced Apartments + 30,000 sq. m. of retail	District	2,752.4 Cr.	1	2752.4		100%
3.- Gaming Cluster	Relocation of existing casinos either inland (Cluster) or to another Bay + Parking	District	55,048,000	1	5.5		100%
4.- Golf Course	Eco-friendly Executive Golf course	Hole	220,192,000	9	22.01		100%

These costs do not include the cost of land

(*) Investment is subject to specific project conditions and may vary largely depending on location, site preparation, golf course construction works and development program

Leisure & Entertainment Programs - Estimated initial investment (phased over the next 10 years)



L&E Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Waterfront Promenades	14 km of Promenade	19.3	9.6	9.6	-	-	-	-	-	-	-	-
2.- Family Entertainment District (inclusive of Themed Park)	1 District	2752.4	-	-	-	-	-	550.5	550.5	550.5	550.5	550.5
3.- Gaming Cluster	1 Cluster	5.5	1.8	1.8	1.8	-	-	-	-	-	-	-
4.- Golf Course	1 Golf Course	22.0	-	-	-	-	-	-	-	7.3	7.3	7.3
Total L&E Programs Budget		2799.2	11.5	11.5	1.8	-	-	550.5	550.5	557.8	557.8	557.8
(%)		100%	0.41%	0.41%	0.07%	-	-	19.67%	19.67%	19.93%	19.93%	19.93%

Leisure & Entertainment Programs - Reinvestment (1.5% of estimated initial investment)



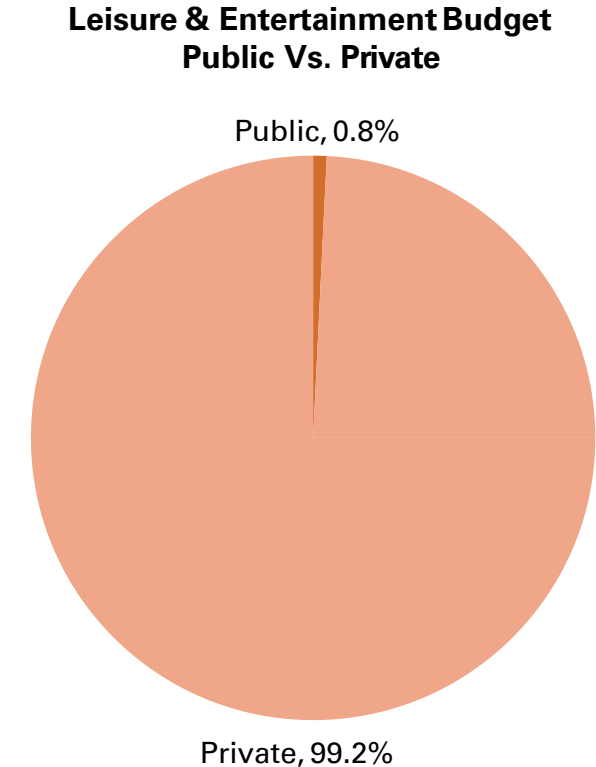
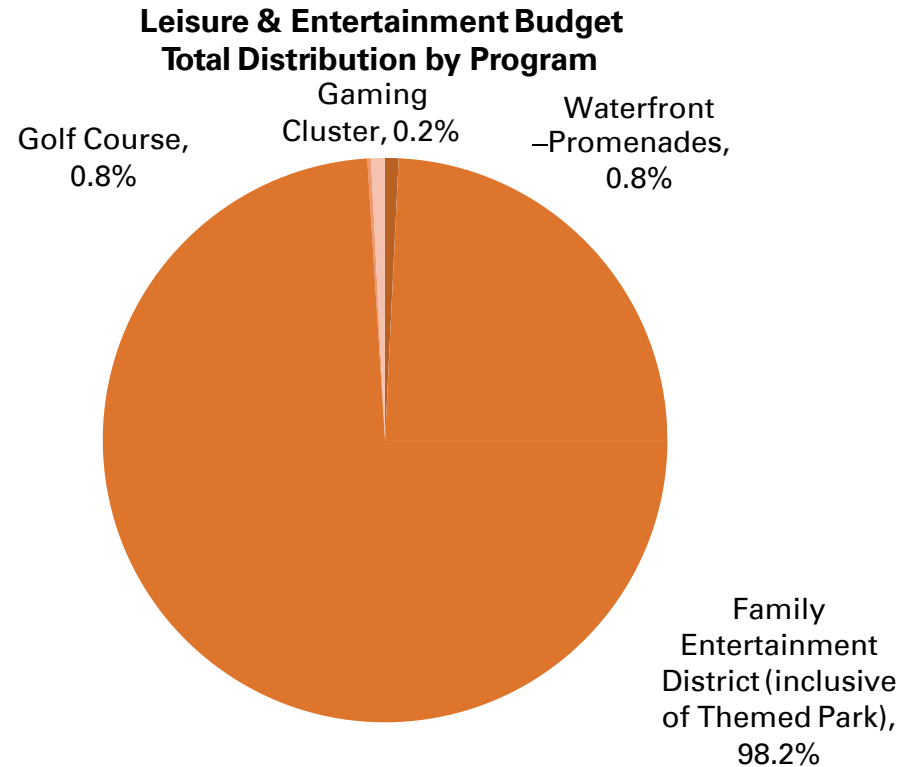
L&E Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Waterfront Promenades	14 km of Promenade	2.3	-	-	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
2.- Family Entertainment District (inclusive of Themed Park)	1 District		-	-	-	-	-	-	-	-	-	-
3.- Gaming Cluster	1 Cluster	0.6	-	-	-	0.1	0.1	0.1	0.1	0.1	0.1	0.1
4.- Golf Course	1 Golf Course	-	-	-	-	-	-	-	-	-	-	-
Total L&E Programs Budget		2.9	-	-	0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4
(%)		100%	-	-	10.00%	12.86%	12.86%	12.86%	12.86%	12.86%	12.86%	12.86%

Leisure & Entertainment Programs - Total estimated initial investment + Reinvestment



L&E Programs Yearly Budget	Number of projects	Total (INR cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Waterfront Promenades	14 km of Promenade	21.6	9.6	9.6	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
2.- Family Entertainment District (inclusive of Themed Park)	1 District	2,752.4	-	-	-	-	-	550.5	550.5	550.5	550.5	550.5
3.- Gaming Cluster	1 Cluster	6.1	1.8	1.8	1.8	0.1	0.1	0.1	0.1	0.1	0.1	0.1
4.- Golf Course	1 Golf Course	22.0	-	-	-	-	-	-	-	7.3	7.3	7.3
Total L&E Programs Budget		2,802.1	11.5	11.5	2.1	0.4	0.4	550.9	550.9	558.2	558.2	558.2
(%)		100%	0.41%	0.41%	0.08%	0.01%	0.01%	19.66%	19.66%	19.92%	19.92%	19.92%

Leisure & Entertainment Programs - Total estimated initial investment + Reinvestment



Total expected cost
(over the next 10 years)
INR 2802.1 Cr.

Leisure & Entertainment Programs - Facility Management Recurrent Expenditures (2% of estimated initial investment)



L&E Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Waterfront Promenades	14 km of Promenade	3.1	-	-	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
2.- Family Entertainment District (inclusive of Themed Park)	1 District		Not estimated									
3.- Gaming Cluster	1 Cluster		Not estimated									
4.- Golf Course	1 Golf Course		Not estimated									
Total L&E Programs Budget		3.1	-	-	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
(%)		100%	-	-	12.50%	12.50%	12.50%	12.50%	12.50%	12.50%	12.50%	12.50%

Facility Management Recurrent Expenditures refers to maintenance, cleanliness and security of the facility
Private annual recurrent expenses related with Facility Management are not estimated

Leisure & Entertainment Programs- Financing Options



Leisure & Entertainment Program Initiatives			
Waterfront Promenades	Family Entertainment District (inclusive of Themed Park)	Gaming Cluster	Golf Course
<input type="checkbox"/> State and Central government support for development of sea face and river fronts	<input type="checkbox"/> PPP model of financing for key projects <input type="checkbox"/> Private funding for individual projects	<input type="checkbox"/> Private funding for individual projects	<input type="checkbox"/> Financing through global private firms <input type="checkbox"/> Funding by top star hotel chains to give exclusivity to tourists

Leisure & Entertainment Programs - summary



Program	Implementation					Financing model		Operations model	
	Flagship program	'Quick win'	Short term	Medium term	Long term	Public	Private	Public	Private
1.- Waterfront Promenades	✓	✓	✓			Lead	Support	Lead	Service contract
2.- Family Entertainment District (inclusive of Themed Park)	✓				✓	Support	Lead	-	Lead
3.- Gaming Cluster		✓	✓			Support	Lead	-	Lead
4.- Golf Course					✓	-	Lead	-	Lead

Short term: within 3 years

Medium term: 3 - 5 years

Long term: 5 years/ above

MICE (Meetings, incentives, conferences & exhibitions) & Weddings Programs



1

Convention Centre + Ancillary facilities (including Hotels)

Vicinity of proposed Mopa airport (Pernem) or Panaji in Dona Paula area – subject to availability of land



Malaysia

2

Mass Events

Shyama Prasad Indoor Stadium, Vagator and Candolim



Belgium


3

Weddings and Incentive Trips

All across Goan Hotels and ancillary facilities at the Convention Centre



Costa Rica
Rajasthan

 Flagship programs

 Quick Wins



Convention Centre + ancillary facilities (including hotels)

Product: MICE & Weddings tourism	
Flagship program	Quick wins
✓	
Timeframe: Long term	
Concept and objectives	<ul style="list-style-type: none">• MICE tourism is a good way to attract tourists out of the high season and weekends and fill up hotels during the low season. It is also a good way to take tourist away from the most concentrated tourism areas.• Though meetings are well develop in Goa, large conventions are not, as there is no Convention and Exhibition centre in the capital. In order to adapt to the market and offer this tourism product, Goa needs a proper Convention Centre with capacity for up to 10,000 people as well as improve the value chain and complementary products serviced with these facilities. The Convention Centre should be part of a mixed-use complex also offering retail, F&B and accommodation options.
Accommodation needs	<ul style="list-style-type: none">• Around 1.000 keys need to be provided in adjacent and fully connected facilities – they must be of sufficient quality (4 and 5-star international standards)
Market strategy	<ul style="list-style-type: none">• Domestic and foreign tourists• Day and overnight visitors
Commercial strategy	<ul style="list-style-type: none">• A proper Convention Centre to attract events of large scale and include Goa on the map of MICE destinations

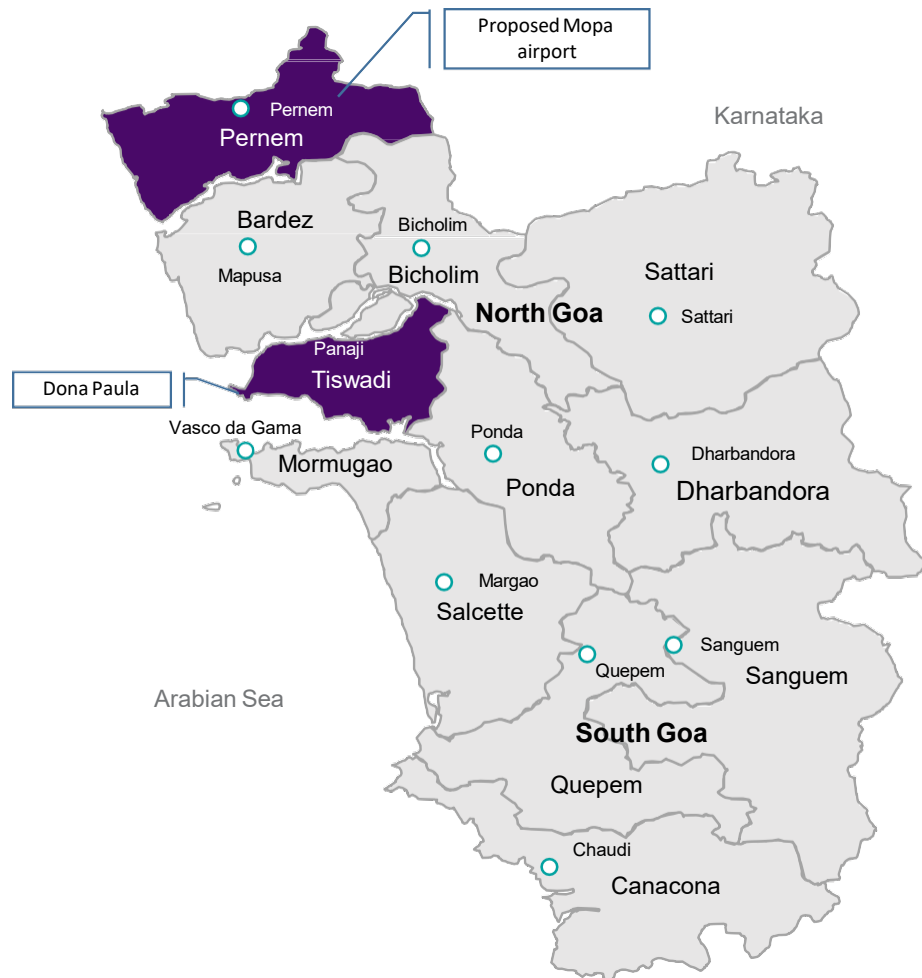
Implementation strategy

- It is expected that the facility alone will not create sufficient attraction, it would be necessary to have the whole package of tourism infrastructure to pursue a correct economic development strategy and development of the tourism product. Convention Centre should be part of a mixed-use complex which has to be planned and built as a whole. Improve the value chain serviced together with the convention is a must.

Key issues to be addressed

- It must be in close proximity to transportation and airport access routes
- Friendliness and attractiveness of the destination is as important as the development of the complex
- Other attractions besides the meeting facilities are also necessary to create interest in the city as a destination – people coming to the Conference Centre may be attracted commercial/ leisure/ entertainment attractions. Maybe there is an interesting link of this program to the Family Entertainment District (see Leisure & Entertainment programs)
- 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

A world-class Convention Centre in the vicinity of the proposed Mopa airport to launch Goa as a competitive destination for MICE tourism



Potential locations	Facilities and land requirements
Vicinity of proposed Mopa airport (Pernem) or Panaji in Dona Paula area – subject to availability of land	-

Description and tasks
<ul style="list-style-type: none"> • Build a Convention Centre to cater for up to 10,000 people, but it should be designed as multifunctional hall • Small meeting rooms in the same building for breakout session; Around 1,000 keys need to be provided in adjacent and fully connected facilities • Improve the value chain serviced together with the convention, especially taxis (for the pick up and drop off from the airport); waiting/ meeting area in the airport • Bali for example is laying special emphasis on its development as a MICE center • Creation of a Goa Convention Bureau linked with the Goa Tourism Board to market Goa as a MICE destination

Benchmark and character images



"Best Practices"

- Malaysia Convention and Exhibition Bureau (www.myceb.com.my/)
- Paris Convention and Visitors Bureau (<http://en.convention.parisinfo.com/>)
- Delhi Convention Centre
- Dubai World Trade Center (<http://www.dwtc.com>)



Mass events

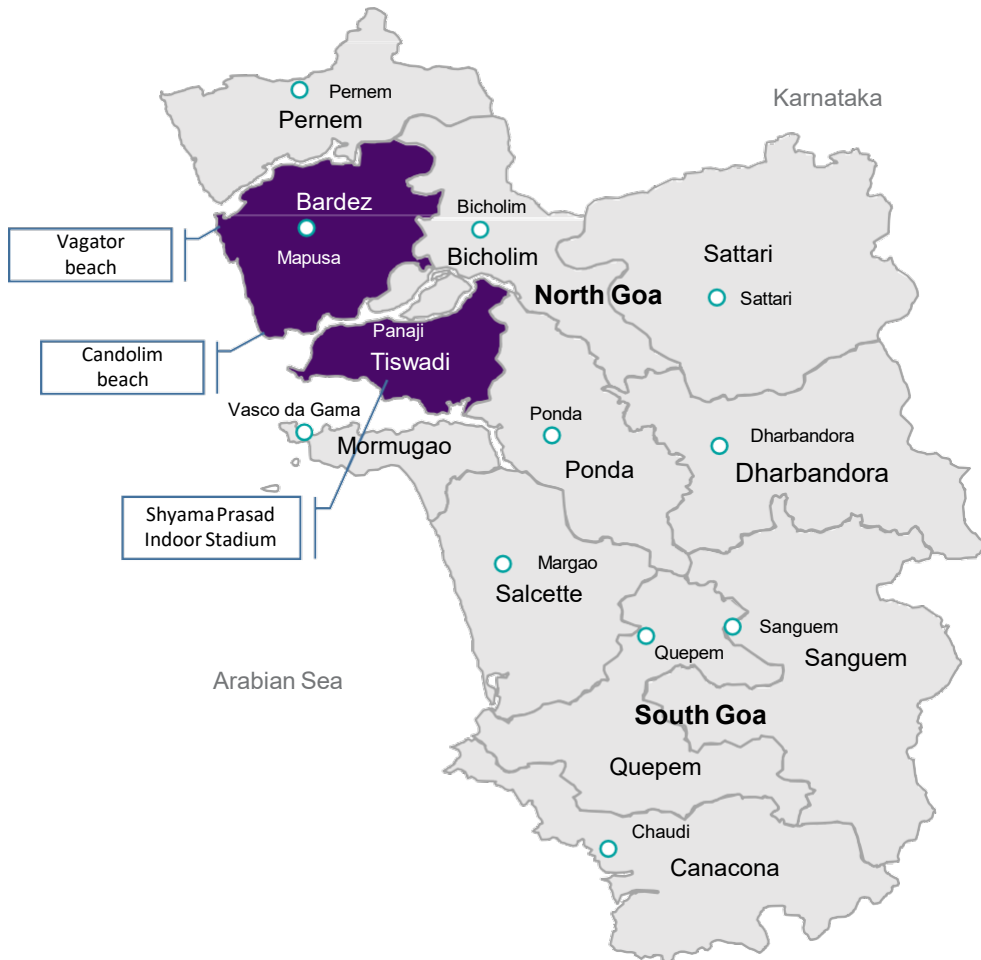


Product: MICE & Weddings tourism	
Flagship program	Quick wins
	✓
Timeframe: Short term	
Concept and objectives	<ul style="list-style-type: none"> The primary objective is to attract numerous local residents, visitors and tourists to a mass event However, a mass event is also used as a marketing claim for Goa, whether those who get to know about the vent come to enjoy or only talk about it without coming to Goa The concept is to program several mass events every year, especially during the low and mid season and use them as claim for the destination, as long as their theme or topic is relevant to the proposed positioning and products' portfolio for Goa
Accommodation needs	<ul style="list-style-type: none"> None specific as this kind of event requires a large number of beds of different categories and types in the vicinity of the event
Market strategy	<ul style="list-style-type: none"> To promote Goa's uniqueness and make "noise" about Goa as a lively and entertaining place

Key issues to be addressed

- Ideally in close proximity to transportation and airport access or facilitation must be provided
- Keep current events and also generate new ones
- Ensure maximum professionalism in the organization of the event and mitigate potential nuisance to local residents and to the overall tourism image of Goa
- Involve multiple local stakeholders: public, private, and civil society

Mass events should focus on the low season and be supportive to Goa's tourism positioning



Potential locations	Facilities and land requirements
Shyama Prasad Indoor Stadium, Vagator and Candolim	N/A

Description and tasks
<ul style="list-style-type: none"> Goa Carnival Shigmotsav cultural event could be upgraded, rebranded and marketed to attract domestic and international tourists Goa food festival should be focusing more or exclusively to Goan cuisine Kala Academy should provide events throughout the year, especially during the low and mid season; and should be more marketed. Certify professional companies to set up this kind of events Plan joint event promotion with tourism promotion of Goa and, if applicable, to specific tourism product Get contact details of participants to establish a database that can be used in future promotions of events.

Benchmark and character images



"Best Practices"

- The Blue Flag programme
- Nautical Stations in Spain



Weddings and incentive trips



Product: MICE & Weddings tourism	
Flagship program	Quick wins
	✓
Timeframe: Short term	
Concept and objectives	<ul style="list-style-type: none"> Weddings and incentives are a lucrative complementary tourism product which should be developed in Goa especially to fill the low/ non peak season. Goa is already a popular wedding destination, which can multiply its potential, also for incentive trips destination with its range of tourism assets. Due to its nature, these types of tourism are conducted mainly for leisure and entertainment. The recommendation is to link this tourism products with activities related to skills, local culture, sports, adventure, food and drinks. The hinterland could be configure (in line with the Master Plan) in order to concentrate on an interesting complementary offering.
Accommodation needs	<ul style="list-style-type: none"> The inclusion of high-end music venues or high-end lifestyle beach clubs combined with more quiet and secluded resorts
Market strategy	<ul style="list-style-type: none"> Domestic and foreign tourists

Commercial strategy

- Goa is a unique and vibrant place to celebrate a wedding or an incentive trip

Implementation strategy

- Establish a marketing club of a number of high quality properties, starting with those already working on the development and promotion of weddings and incentive trips.

Key issues to be addressed

- Activities related to skills, local culture, sports, adventure tourism, nature, food and drinks should be also developed to offer an attractive weddings and incentive trips product.
- Better policies and promotions for developing the destination wedding market
- 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
- Development of complementary tourism products like wellness, adventure tourism and others to improve on the average length of stay of tourists during MICE visits.

Goa by virtue of its lush green forests and fields, as well as its picturesque beaches is a key venue for destination weddings



Potential locations	Facilities and land requirements
All across Goan Hotels and ancillary facilities at the Convention Centre	-

Description and tasks
<ul style="list-style-type: none"> • Facilitate joint promotion of Goa as a wedding and incentives destination • Target both domestic and international markets • Create catalogue and specific section in Goa website for promotion • Develop specialised products and agencies for incentives and corporate outbound activities like leadership development and team building • Enhance facilities and agencies such as wedding planners to ease the conduct of destination weddings. • Staff should be trained in event organization and management

Benchmark and character images



"Best Practices"

- Bluehat Group (<http://www.bluehatgroup.co.uk/>)
- Team bonding (<https://www.teambonding.com/>)



MICE & Weddings Programs - Initial investment concepts



Estimations refer to the costs of building one unit/ facility

Programs	cost concept	Unit of measure	Cost per unit (INR)	Number of units	Total Cost (INR Cr.)	Financial Model	
						Public	Private
1.- Convention Centre + ancillary facilities (including Hotels)*	Convention Centre to cater for up to 10,000 people	Sq. m.	47,135	10,000	47.1	100%	
	Ancillary facilities of the Convention Centre including several 4-star Hotels (1,000 keys)	Keys	68,810	60,000	412.8	100%	
2.- Mass Events	N/A	N/A	N/A	N/A	N/A	N/A	N/A
3.- Weddings and Incentive Trips	N/A	N/A	N/A	N/A	N/A	N/A	N/A

These costs do not include the cost of land

(*) Investment is subject to specific project conditions and may vary largely depending on location, site preparation, marina construction works and development program

MICE & Weddings Programs - Estimated initial investment (phased over the next 10 years)



M&W Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Convention Centre + ancillary facilities (including Hotels)	1 Convention Centre + ancillary facilities	460.0	-	-	-	-	-	153.3	153.3	153.3	-	-
2.- Mass Events	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
3.- Weddings and Incentive Trips	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total M&W Programs Budget		460.0	-	-	-	-	-	153.3	153.3	153.3	-	-
(%)		100%	-	-	-	-	-	33.33%	33.33%	33.33%	-	-

MICE & Weddings Programs – Reinvestment (1.5% of estimated initial investment)



M&W Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Convention Centre + ancillary facilities (including Hotels)	1 Convention Centre + ancillary facilities	13.8	-	-	-	-	-	-	-	-	6.9	6.9
2.- Mass Events	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
3.- Weddings and Incentive Trips	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total M&W Programs Budget		13.8	-	-	-	-	-	-	-	-	6.9	6.9
(%)		100%	-	-	-	-	-	-	-	-	50.00%	50.00%

MICE & Weddings Programs – Total estimated initial investment + Reinvestment

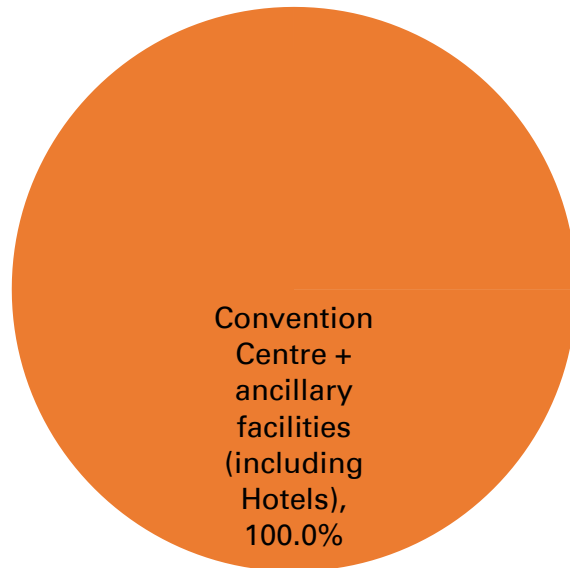


M&W Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Convention Centre + ancillary facilities (including Hotels)	1 Convention Centre + ancillary facilities	473.8	-	-	-	-	-	153.3	153.3	153.3	6.9	6.9
2.- Mass Events	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
3.- Weddings and Incentive Trips	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total M&W Programs Budget		473.8	-	-	-	-	-	153.3	153.3	153.3	6.9	6.9
(%)		100%	-	-	-	-	-	32.36%	32.36%	32.36%	1.46%	1.46%

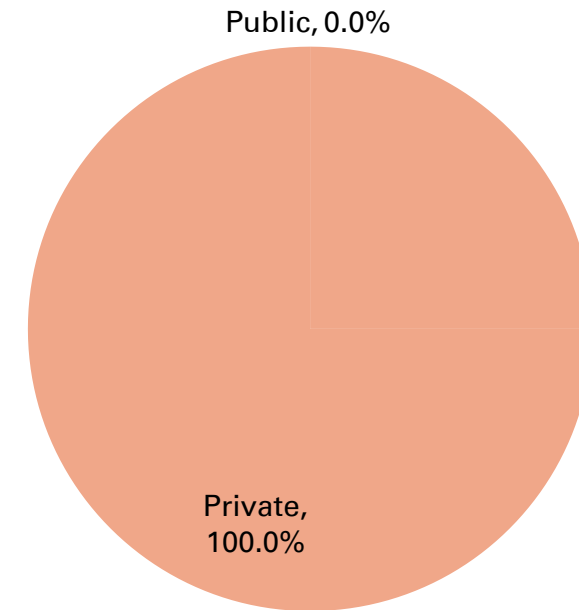
MICE & Weddings Programs – Total estimated initial investment + Reinvestment



**MICE & Weddings Budget
Total Distribution by Program**



**MICE & Weddings Budget
Public Vs. Private**



Total expected cost
(over the next 10 years)
INR 473.8 Cr.

MICE & Weddings Programs - Operating expenditures (2% of estimated initial investment)



M&W Programs Yearly Budget	Number of projects	Total (INR Cr.)	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
1.- Convention Centre + ancillary facilities (including Hotels)	1 Convention Centre + ancillary facilities	18.4									9.2	9.2
2.- Mass Events	6 Events/ Year	20.6	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1
3.- Weddings and Incentive Trips			<i>Not estimated</i>									
Total M&W Programs Budget		39.0	2.1	2.1	2.1	2.1	2.1	2.1	2.1	2.1	11.3	11.3
(%)		100%	5.29%	5.29%	5.29%	5.29%	5.29%	5.29%	5.29%	5.29%	28.85%	28.85%

Facility Management Recurrent Expenditures refers to maintenance, cleanliness and security of the facility
Private annual recurrent expenses related with Facility Management are not estimated

MICE & Weddings Programs – Financing Options



MICE & Weddings Program Initiatives		
Convention Centre + ancillary facilities (including Hotels)	Mass Events	Weddings and Incentive Trips
<ul style="list-style-type: none">❑ Financing options would include PPP with major F&B brands and hotel chains entering into BOT contract with the State government❑ Private funding for individual projects	<ul style="list-style-type: none">❑ Funding support can be attained through theme parks and tourism firms❑ Private funding for individual projects	<ul style="list-style-type: none">❑ Funding through global tourism companies with support from State government❑ Private funding for individual projects

MICE & Weddings Programs - summary



Program	Implementation					Financing model		Operations model	
	Flagship program	'Quick win'	Short term	Medium term	Long term	Public	Private	Public	Private
1.- Convention Centre + Ancillary facilities (including Hotels)	✓				✓	PPP		PPP	
2.- Mass Events		✓	✓			PPP		PPP	
3.- Weddings and Incentive Trips		✓	✓			Support	Lead	-	Lead

Short term: within 3 years

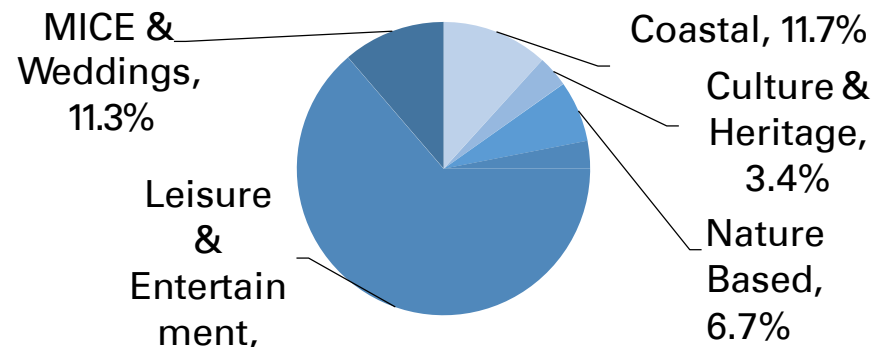
Medium term: 3 - 5 years

Long term: 5 years/ above

Tourism Programs - Estimated costing overview

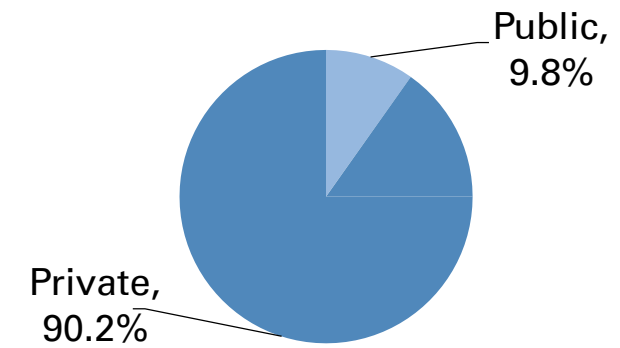
Consolidated Yearly Budget	Total (INR Cr.)	Private investment (INR cr.)	(%)	Public Investment (INR cr.)	(%)
<i>Coastal</i>	493.0	368.8	74.8%	124.2	25.2%
<i>Culture & Heritage</i>	144.6	2.9	2.0%	141.7	98.0%
<i>Nature Based</i>	283.0	159	56.2%	124	43.8%
<i>Leisure & Entertainment</i>	2,802	2,778.6	99.2%	23.4	0.8%
<i>MICE & Weddings</i>	473.8	473.8	100.0%	-	-
Total	4196.6	3,785.3	90.2%	411.3	9.8%

**Budget
Total Distribution by Program**



Total expected cost
(over the next 10 years)
INR 4196.6 Cr.

**Budget
Public Vs. Private**



Estimated costing overview related to projected accommodation supply

Consolidated	2021	2026	2031
Number of beds	84,991	119,204	167,189
Number of rooms	42,497	59,603	83,595
Total investment (in INR Cr.)	4,142	7,041.4	9,845.2

Current Classification	Number of beds	Star-rating	Number of rooms	INR/ Unit	Incremental Investment in INR Cr.
Category A	17,177	5-star	8,589	82,57,200	1,434
Category B	21,198	4-star	10,599	55,04,800	1,479
Category C	18,923	3-star	9,462	27,52,400	718
Category D	27,636	2-star and below	13,318	13,76,200	505
		Homestay	500		
Category Heritage	57	Heritage	29	20,64,300	5.9
Total by 2021	84,991	-	42,497	-	4,142

* At 2016 prices

Estimated costing overview related to projected accommodation supply

Current Classification	No. of beds	Star-rating	Number of rooms	INR/ Unit	Incremental Investment in INR Cr.
Category A	24,092	5-star	12,046	82,57,200	2,854.5
Category B	29,731	4-star	14,866	55,04,800	2,370.9
Category C	26,540	3-star	13,270	27,52,400	1,048.1
Category D	38,761	2-star and below	18,631	13,76,200	731.2
		Homestay	750		34.4
Category Heritage	80	Heritage	40	20,64,300	2.3
<i>Total by 2026</i>	119,204	-	59,603	-	7,041.4

Current Classification	No. of beds	Star-rating	Number of rooms	INR/ Unit	Incremental Investment in INR Cr.
Category A	33,790	5-star	16,895	82,57,200	4,003.9
Category B	41,699	4-star	20,850	55,04,800	3,294.1
Category C	37,224	3-star	18,612	27,52,400	1,470.3
Category D	54,364	2-star and below	26,182	13,76,200	1,039.2
		Homestay	1,000		34.4
Category Heritage	112	Heritage	56	20,64,300	3.3
<i>Total by 2031</i>	167,189	-	83,595	-	9.845.2

Current initiatives in the State

Department of Tourism of Goa & GTDC are currently implementing and planning some specific projects, which need to be taken into account and positioned within the Master Plan's programmes framework

Regeneration/ Upgradation of Popular Beaches

Key initiative is the Coastal Tourism Circuit which are being carried out through procurement of Govt. of India funds under The Swadesh Darshan scheme. Some key projects of this include the following:

- Provision of public amenities at Baga, Candolim, Vagator, Anjuna and Morjim beaches
- Toilets
- Cloak room
- Drinking water
- Changing/ shower rooms
- Development of parking lot at Calangute
- Dust Bins, Solar powered street lighting, tourism signage's, installation of CCTV cameras and Wi-Fi facilities at various beaches in Goa
- Procurement of 200 mobile bio toilets

Entertainment & Leisure Activities

Activities/ projects being planned by GTDC across the state through private players, for which approval processes are ongoing:

- Amphibious vehicles
- Hop On Hop Off bus Services.
- Personal Transportation Devices (Segway tours)
- Motorised paragliding - Ashwem, Mandrem, Arambol, Morjim, Tiracol and Little Vagator
- Ropeway from Panaji (Campal to Reis Magos)

Current initiatives in the State

GTDC and the Department of Tourism of Goa are currently implementing and planning some specific projects, which need to be taken into account and positioned within the Master Plan's programmes framework

Forts

- Up gradation & improvement of helipad near the Aguada Jail
- Restoration of the Aguada jail, through refurbishment of certain areas of the jail including cells
- Light & sound show in the open area at the jail
- Setting up of a museum dedicated to Goan freedom fighters, to “showcase Goa's freedom struggle while being a tribute to the heroic deeds and glorious sacrifices by all those who worked towards Goa's liberation.”
- The master plan for the conversion of the jail includes activity zones, viewing galleries, amenity zones and tourist information centers; improving the temple and chapel areas, the aquifer duct area, prison cells, prison corridors, walls and pathways; installing seating and water fountains; illuminating the jail campus.
- Provision of F&B facilities through a café

The Goa Investment Promotion and Facilitation Board (Goa - IPB) is a facilitating agency for development of industries in Goa, including tourism

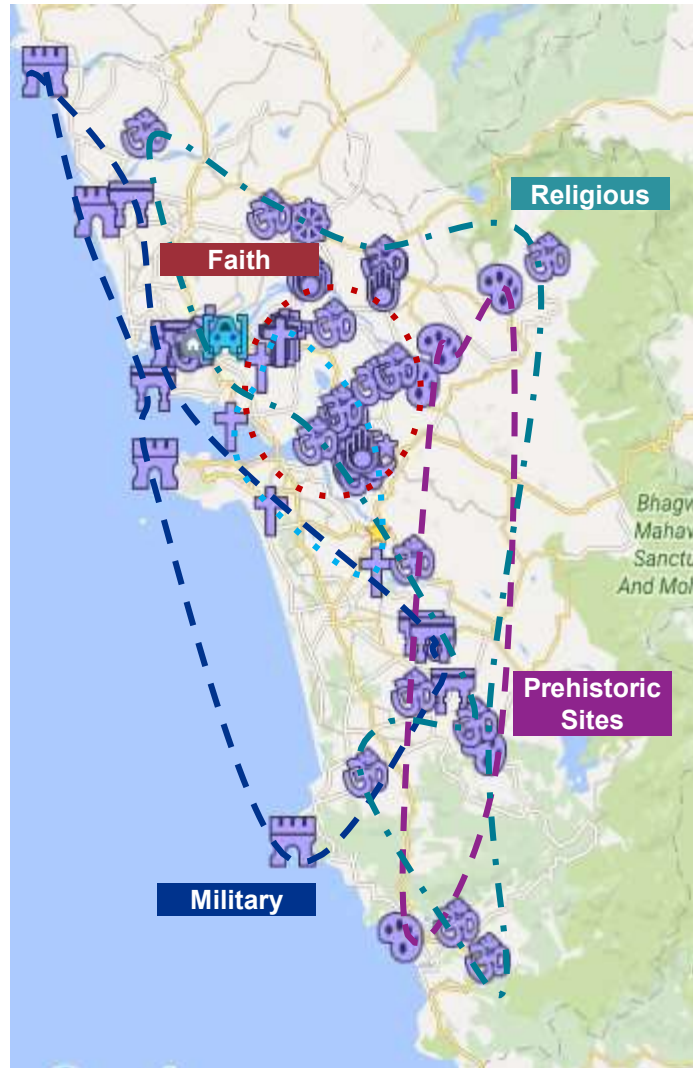
Investment Promotion Board

- The Board is a special purpose vehicle for facilitating investment in the state
- The incentives under the Goa investment policy would also provide a boost for development in the state

Tourism circuits - 26 types

Culture / Heritage (9 types)	Nature/ Eco (9 types)	Transversal/ combined circuits (8 types)
<ul style="list-style-type: none"> • Military: Forts • Religious : Churches/ Temples/ Mosques • Portuguese heritage/ legacy: Churches/ Houses • Goa Old Town (City tour to places of historical/ cultural importance) • 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 	<ul style="list-style-type: none"> • Scenic Routes • Wildlife Sanctuaries and National Parks • Farms: Spice/ Cashew/ Areca nut/ Coconut/ Rubber • Animal sighting • Birding • Protected marine life (turtle nesting, dolphin experiences and corals) • Backwaters exploration • Reptile/ Amphibian/ Insect viewing • Best of Nature 	<ul style="list-style-type: none"> • River Cruise • Train route from N to S and W to E • Bicycle tracks near rivers/ in Natural Parks • Trekking routes • Coastal circuits: <ul style="list-style-type: none"> • Forts • Old Town • Turtle nesting • View Point • Hinterland circuits: <ul style="list-style-type: none"> • Spice Farms • Wildlife • Waterfalls • River Cruise • Wellness in nature • Panaji Circuit <ul style="list-style-type: none"> • Fontainhas • Mandovi River Cruise • Bird Sanctuary • Old Goa • Best of Goa

Connectivity Strategy – Tourism circuits infrastructure needs – culture & heritage



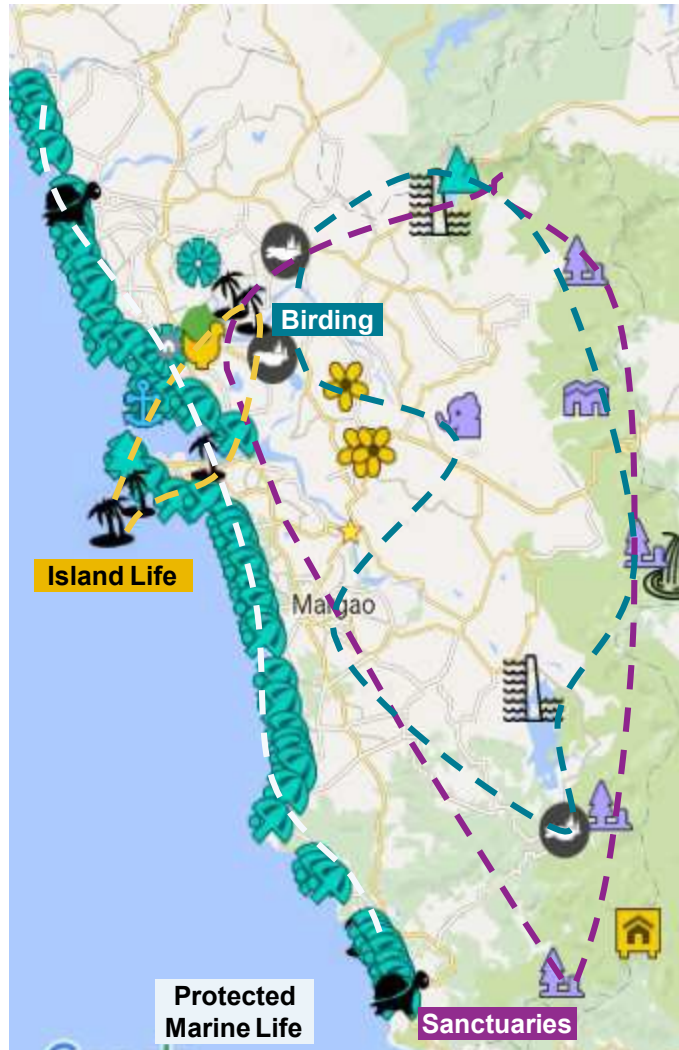
Culture / Heritage:

- **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

Connectivity Strategy – tourism circuits infrastructure needs – nature/eco



Nature/ Eco:

- **Scenic Routes**
 - **Wildlife Sanctuaries**
 - **Farms:** Spice/ Cashew/ Areca nut/ Coconut/ Rubber
 - **Animal sighting**
 - **Birding** – Lakes, beaches, rivers and protected areas
 - **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

Connectivity/ Infrastructure Strategy for tourism circuits to spread tourism across the state

Key facilitating Infrastructure:

- Interpretation/ Information centres
- Information kiosks and marketing material
- Circuit itineraries, including travel options (possibly posted on the website)
- Signage along circuits with asset descriptions on site
- Local guides, interpreters and translators
- Barrier free access and facilitating infrastructure for specially abled persons including paraphernalia
- Transportation Hubs
- Multiple accommodation types for various target travellers
- Food and drinking water facilities
- Town/ City/ Village walking routes with maps, along with standardised walkways and footpaths
- Quality, safety and hygiene programs
- Garbage management
- Foreign exchange kiosks at key tourism hotspots
- Kiosks providing subscriber identity module (SIM) cards at key tourism hotspots
- Information provision through websites and mobile applications, besides social media platforms
- Development of modes of mass transport between key tourism assets/hotspots
- Provision of cycles and alternative modes of transport including electrically powered vehicles

3.

Support tourism
infrastructure

Buy side infrastructure

Public amenities and services in
Goa

Core infrastructure

Transport and connectivity

Human resource and training

Infrastructure Strategy - Support Infrastructure

Water supply & Waste management

- Goa has statewide coverage in drinking water
- Water demand from tourism is expected to double to ~15 MCMY (Million cubic meter per year) by 2030
- Tourism currently contributes to 8.4% of solid waste produced in the state
- Poor waste management is seen to be causing a strain on the tourism sector
- Utilization of new age waste water disposal methods are required, especially in mass tourism areas
- The 100-tonne per day ultra-modern municipal solid waste management facility at Saligao is expected to handle waste from the North Goa coastal belt
- The Govt. plans to have a similar plant in South and Central Goa for garbage management by 2017

Electricity Supply

- The energy requirement of the tourism establishments is around 210 mn kWh annually which is 7% of the total energy consumed in the state
- Shortfall of 100MW during peak hours adversely affects the tourism industry through frequent power cuts
- 24X7 electricity should be provided at key tourism assets and establishments in the long term
- In the short term means should be undertaken to provide 24X7 supply at tourist accommodation, flagship products and tourism hotspots

Healthcare

- Goa has a sound health infrastructure in place to cater to the health needs of locals and tourists alike in terms of the Doctor population and Bed population ratios
- Increased number of emergency healthcare and first aid services would be required at tourism hotspots with tourism growth

Innovative Financing

- Corporate Social Responsibility is a mandatory regulatory requirement for respective corporates in India
- Many aid the local Govt. in development of public infrastructure facilities as part of their CSR initiatives
- Goa can leverage this to develop basic utilities which would aid in enhancing its tourism potential

Source: Public Works Department ; T E R I. 2012, Directions, Innovation and Strategies for Sustainable Development in Goa, National Health Mission

Connectivity Strategy – International, National and Intra State

Air

- The Concession Agreement for setting up the Mopa airport has been signed in November 2016, and is expected to have a passenger handling capacity of 13.1 million per annum by 2036
- The airport is expected to be set up by 2019-20, and will boost air connectivity of Goa along with easing the capacity constraint at Dabolim
- Goa is well connected to major states across the country. Better connectivity to major cities besides Mumbai and Delhi is the need of the hour
- Goa currently has **direct flight connectivity to destinations in the Middle East** which forms a hub for international arrivals.
- Charters are an important mode of transport for international travelers, and promotion efforts should be made on attracting higher spend packages
- However, greater emphasis needs to be laid on attracting **Free Independent Travelers (FITs)**
- The recently released National Civil Aviation Policy is expected to promote air connectivity across the nation, including the Regional connectivity programme

Water

- The **cruise terminal** at the Mormugao Port Trust is currently attracting international cruise travelers
- Domestic tourists can also be attracted through short duration inter state cruises
- **Intra state connectivity** can be developed through **infrastructure improvements/ development** at the Tiracol Fort, Chapora river basin, Fort Aguada, Dona Paula / Panaji - Old Goa, Mormugao Port, Colva Beach, Mobor Beach/ River Sal/ Cabo De Ram, River Talpona/ Polem **jetties**
- These jetties can support Ferry Services, Catamaran Ferry, Sea Buses, Speed Boats and Seaplanes to ferry tourists
- **Seaplane services** can function as feeder points for high end tourists to the coastal regions with fast road connectivity to the interiors of Goa, increasing accessibility

Source: RFQ Document for the Mopa Greenfield airport project

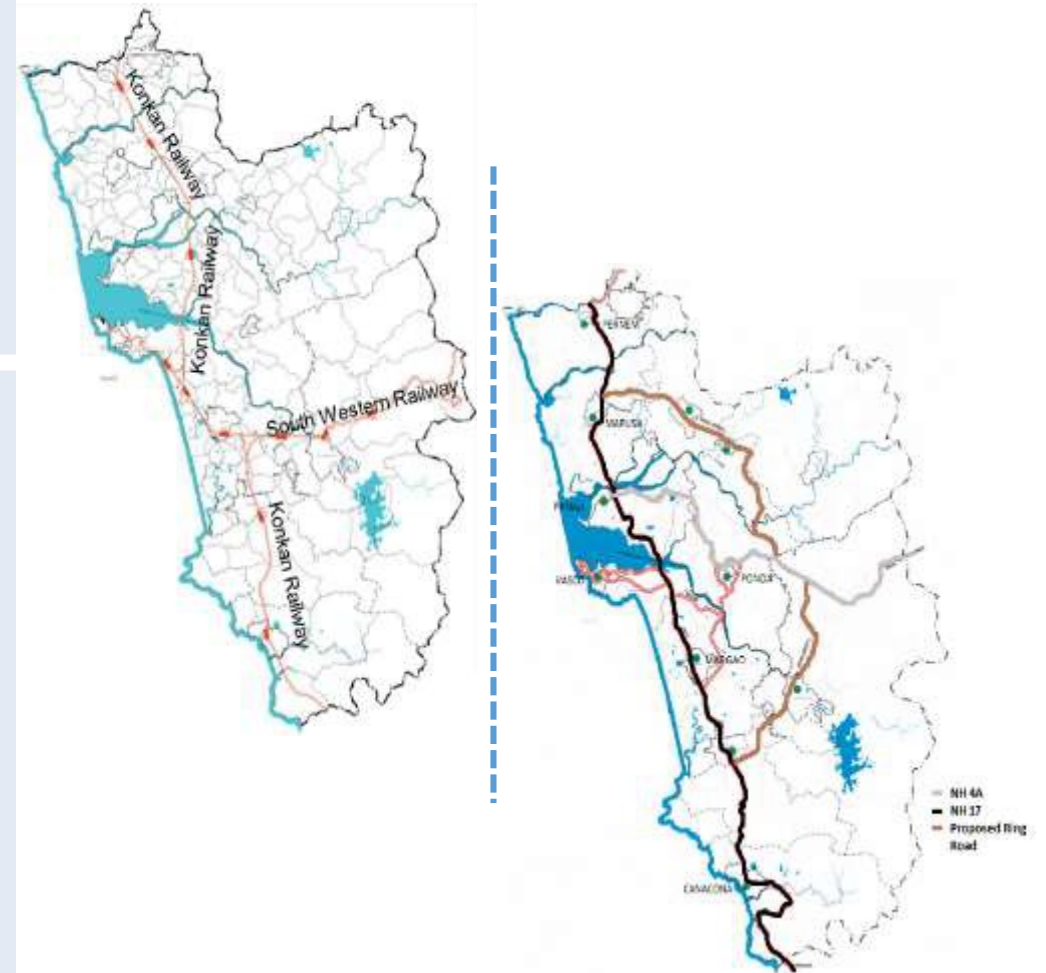
Connectivity Strategy – International, National and Intra State

Rail

- **Konkan and South Western Railways** with a Single Track Broad Gauge railway line are operational in Goa.
- Trains run at speeds up to 120 km/h (design – 160km/h)
- The Konkan Railway railway track when doubled could accommodate 120 (both passenger and goods) trains/ day.
- These works are expected to be completed in five years and would boost connectivity to North and South India.
- The proposed track doubling for the South Western Railway would also facilitate connectivity to East India.

Road

- Goa is connected to the rest of India through two major highways – NH17 and NH4A
- **Phased augmentation** through four and six laning of **highway stretches** would boost road connectivity greatly
- An **important link road** of 30 m R/w is proposed to link NH4A (near Corlim) and NH17 (at Agassaim).
- **NH-4A is planned to be extended in two directions** promoting hinterland connectivity
- The **new Mandovi and Zuari bridges** would decrease travel times greatly between North and South Goa
- High speed connectivity from North to South Goa is envisaged
- Private vehicles, Taxis, Buses, Rent-a-bike/car are key forms of transport



Connectivity Strategy – Tourism signage system

Current situation and needs

- The state has limited general signage and indeed a tourism signage system.
- A good and consistent sign posting system is extremely relevant in any tourist destination but even more for those like Goa, which is and can be visited mostly by road, thanks to short distances between attractions.
- Many of the new products that have been proposed for the Master Plan invite tourists to enjoy them best through circuits, mostly by road, though some also using river transportation.



Way forward

- In this context, a clear, visible, permanent, consistent sign posting shall be adopted and developed.
- This is to be supported by walking tour maps and paraphernalia at tourism assets at **well equipped Tourist Information Centers manned by skilled staff**
- Besides regulations established at State and Taluka levels for general signage, a specific tourism sign posting system should be reinforced and developed.
- **Tourism signs and symbols should express their meaning in the most universal and simple language possible** using international standards, as mentioned by the UNWTO to facilitate tourism experience, especially from international visitors.
- Tourism signs and symbols are mainly found at:
 - Ports of entry/ exit such as airports, seaports, bus and railways stations and terminals
 - Buildings, roads, streets, paths and trails
 - Maps, orientations diagrams, guidebooks, tourism pamphlets; and now more and more on Internet portals and web sites

Preparing Human Capital to adapt to and make the most of the Tourism Master Plan opportunities

Creation of Human Resources Service Centres with 3 main functions:



- **HR Service Centres** provide **skills and support to local people** to:
 - create new businesses
 - improve existing ones
 - increase awareness
 - carry out training and support programs
- Service Centers link the demand from local population to create Micro and Small Enterprises and the supply which take into consideration the gaps that exist in the rural tourism sector and the employment in Goa, especially in the hinterlands.
- The awareness centers provide a platform to interact with local stakeholders and design implementation strategies based on local strengths and opportunities, besides providing a platform for grass root engagement

Human Resources Service Centers (HRSC) will be the center point to provide the training, support and awareness required to develop human capacity for Goa.

HRSCs will aim to train and upskill current and future professionals composing the tourism workforce.

There should be at least 3 Centers to serve the Northern Coast, the Southern Coast and the Hinterlands.

Preparing Human Capital to adapt to and make the most of the Tourism Master Plan opportunities

Creation of Human Resources Service Centres with 3 main functions:



A website, on-line courses and an employment database, should also link all the centers and further facilitate human resource development

The implementation of Services centers for Human Resources Development will:

- Increase awareness of the importance of the development and at the same time competitiveness of tourism in Goa as a whole destination, as well as in the different coastal and hinterland tourism destinations.
- Increase the professionalism and know-how of the local stakeholders and public administrations for the development of a marketable higher-end and sustainable tourism in Goa. Increase the quality of services by providing skilled and educated human resources
- Increase the opportunities for local residents to take advantage of the development of tourism in Goa, especially those located in the Hinterlands.
- Provide support to entrepreneurs, professional improvement and creation of employment

Collaboration between DoT, Goa Institute of Public Administration Department (GIPARD) and tourism stakeholders to impart requisite training to tourism sector persons, along with relevant refresher courses where identified would result in formalizing services provided across key sectors like tour guides, taxis and tourist police

Support Tourism Services – Focus on some key transversal services

Taxi Services

- Performance standards of tourist taxi services in the state is important to intra state connectivity
- Govt. measures to **install fare meters with printers combined with a Govt. approved rate card** is a key measure required for seamless transport
- **Global Positioning System (GPS) devices** would be an added advantage for safety and security of drivers and customers alike along with efficient management of fleet services
- Start of taxi aggregators in the state
- Utilization of technology – **Online booking engine; Call centers and email booking infrastructure**
- **Point of sale transactions using mobile card readers**
- **Training and awareness programs along with refresher courses** for taxi drivers, including development of **taxi drivers into tour guides**

Travel organization / booking

- Assistance to smaller tourist trade ventures towards investing in network infrastructure or subscribing to travel portals given the rising demand for online travel bookings
- **Awareness programs** towards ensuring service levels difference between expected and actual service quality from offline partners is minimal

Food & Beverage facilities

- Majority of the restaurants are concentrated in few areas owing to high tourist footfalls
- Ramping up hinterland infrastructure and introduction of tourism products subject to feasibility would then be supported by F&B facilities.
- Ensuring strict adherence to **hygiene and quality standards**

Support Tourism Services – Focus on some key transversal services

Safety/ Security

- Provision for **dedicated tourist police at tourist hotspots**
- **Specialized training** for tourist police for **interacting with tourists** in Goa, including **application of technology** on ground
- Ensure collaboration between tourist police and other Department police personnel
- Personnel to ensure maintenance of law and order at tourist places, and assist the DoT in implementation of its responsibilities under law.
- Collaboration between DoT and the Goa Institute of Public Administration Department (GIPARD) to impart requisite training to tourist police, along with relevant refresher courses
- **Security awareness planning**
 - Training of tourist police to deal with emergency situations
 - Monitoring of tourism hotspots and places real time, through a CCTV network
 - Security awareness programs among tourist trade and other stakeholders
 - Tourist information centers to convey information on safety and security
 - Real time monitoring of deployment of tourist security force, and spread across the state
 - Consistent and highly visible signage across the state, including at tourism assets

Tour guides

- **Certification courses** for tour guides to meet industry requirements pan Goa, including taxi drivers who could serve as tour guides. Best in class standards to be adopted.
- Identification of trainers to give specialized **short time courses at villages** having key culture and heritage or nature tourism sites/ projects
- Formalization of services along with stringent monitoring of **certified tourist guides** providing services
- Collaboration between DoT, Tourist Guides Association and Goa Institute of Public Administration Department (GIPARD) to impart requisite training to tourist guides, along with relevant refresher courses

4.

Commercialization & Promotion

Tourism statistics collection
framework

Destination C&P

Products C&P

Tourism intelligence unit

Tourism Satellite Account - standard statistical framework and main tool for economic measurement of tourism.

UNWTO's (United Nations World Tourism Organization) TSA framework is a set of summary tables, with underlying data:

- ◆ inbound, domestic tourism and outbound tourism expenditure;
- ◆ internal tourism expenditure;
- ◆ production accounts of tourism industries;
- ◆ the Gross Value Added (GVA) and Gross Domestic Product (GDP) attributable to tourism;
- ◆ employment;
- ◆ investment;
- ◆ government consumption, and
- ◆ non-monetary indicators.

India already has a TSA in place at the national level.

The same basic methodology can be applied at the state level. However no TSA can be implemented if a reliable system to collect and analyze basic tourism statistics is not in place.

The State needs to strongly improve its existing tourism statistics system before elaborating a TSA for the State, as the latter feeds itself primarily from tourism statistics. e.g. Market intelligence is a key factor to responding to new tourism trends and behaviors by the Diputació de Barcelona

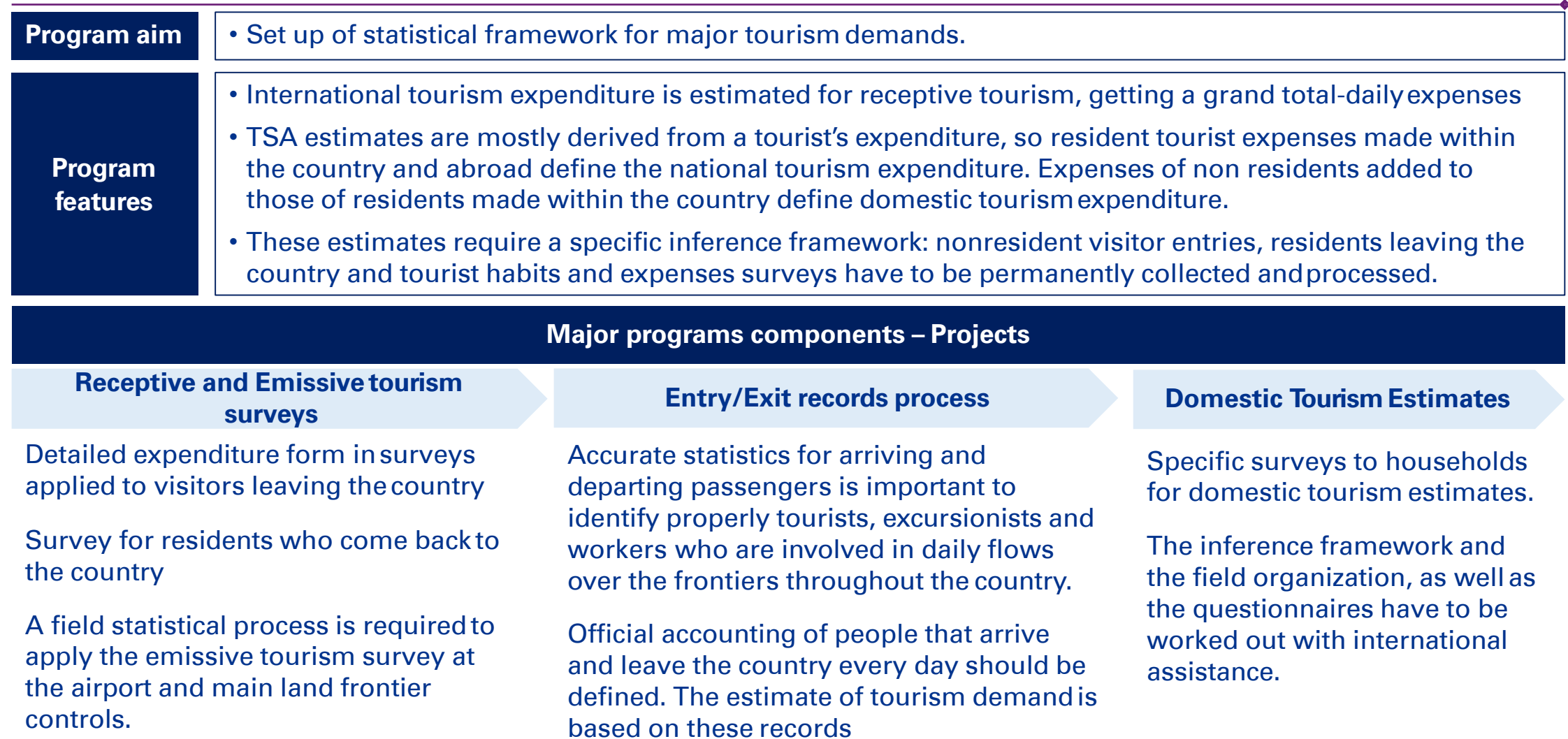
Tourism intelligence unit - Tourism Satellite Account (TSA)

Program aim	<ul style="list-style-type: none"> • Establishment of a statistical framework for major tourism characteristic activities. • This system is part of a major quantitative effort addressed to Goa state-level accounts compilation, which is to be worked out with specific statistical tools.
Program requirements	<ul style="list-style-type: none"> • A directory for tourism characteristic activities forms the core of this statistical inference method, based on surveys applied to producers to characterize economic flows and define tourism's share in GDP. • The proposal for creating a new TSA account takes into consideration that an analytical team of statisticians specialized in tourism need to be created.

Major programs components – Projects

Tourism Characteristic Activities Directory	Inference Method Design.	Characteristic Tourism Producers Survey
<p>Compile data from tax authorities, and other public directories.</p> <p>Set up specific Directory for main tourism activities to define a proper inference framework and obtain estimates for main economic supply variables.</p>	<p>Design applied inference method on procurement of the Directory. The specification of a survey has to be derived to get estimates for each one of the Directory activities</p> <p>DoT and GTDC to define the statistical scope of such estimates according to budget constraints and policy maker needs.</p>	<p>Forms, field survey organization and training for field personnel are a key process for a successful survey.</p> <p>DoT and GTDC to prepare a systematic and permanent yearly survey to producers.</p>

Tourism intelligence unit - Tourism demand statistics collection framework



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 (relaxed attitude and enjoyment of life to the fullest)

"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.

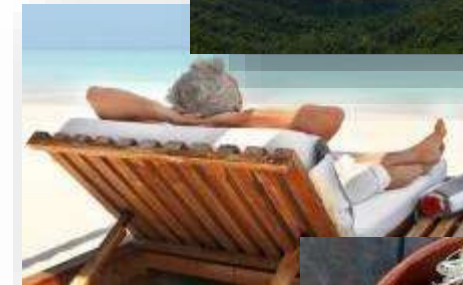
This way of life encompasses Goa tourism resulting in repeat visits to the state, many a times across generations.

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)



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



Enhancing the Goa brand: Adding a Baseline and Story telling

Context & objective



- Recently a new brand was designed for Goa, development of which included a new logo and application manual
- As per international practice of many world destinations, there is an opportunity to further enhance the brand by adding a tag or baseline to the logo
- Moreover, a “story” or short text of Goa as a tourist destination could be written in order to describe the aspirational Goa tourism
- Finally, the brand could be still enhanced by adapting Goa’s defined colors to promotion materials, physical assets, merchandising, handicraft, etc. to be used as “symbols” that people will remember and associate with Goa’s destination personality.

Base line

- A baseline, aims to highlight and summarize under a single word, group of words or sentence, the essence of what Goa can offer to tourists.
- While it is advisable to keep the same logo for a long term (10 years or more), baseline can be changed and adapted every 5 years, if needed, to reflect what Goa wants to enhance as a destination.

Storytelling

- A short text written by a Goan journalist or writer to synthesize the essence of Goa’s experience, could take Goa’s history as a guideline and introduce other concepts. This story /text, should be used as in introduction to all online and offline materials used to describe and differentiate the whole tourism destination
- Though visuals are important, if a story is character and narrative driven it has a better chance at striking an emotional chord with an audience. If a destination can tell a story that resonates emotionally with an audience, they can overcome just about anything.
- The strategic importance of storytelling for a tourism destination:
 - Stories are hard for others to copy
 - Good stories can result in lots of word-of-mouth
 - Myths can be created
 - Fascinating stories create curiosity
 - Stories as catalyst of destination development

Your views on enhancing the new Goa brand: Baseline and Story telling

Base line

- A baseline, aims to highlight and summarize under a single word, group of words or sentence, the essence of what Goa can offer to tourists. While it is advisable to keep the same logo for a long term (10 years or more), baseline can be changed and adapted every 5 years, if needed, to reflect what Goa wants to enhance as a destination.
- Some examples of relevant domestic and international tourism destinations have been shown below
- Implementation guidelines:
 - The baseline should serve to highlight the desired evolution of Goa from a pure beach destination towards an integrated coastal, cultural and nature-based destination, likely to attract higher spending tourists from both India and abroad. The tag or baseline should put forward the unique “blend” of natural and historic features, all present and enjoyable within short distances.
 - Creative part to be developed by a specialized creative agency, under the guidance of and validation by Goa tourism stakeholders, from the public and private sectors.

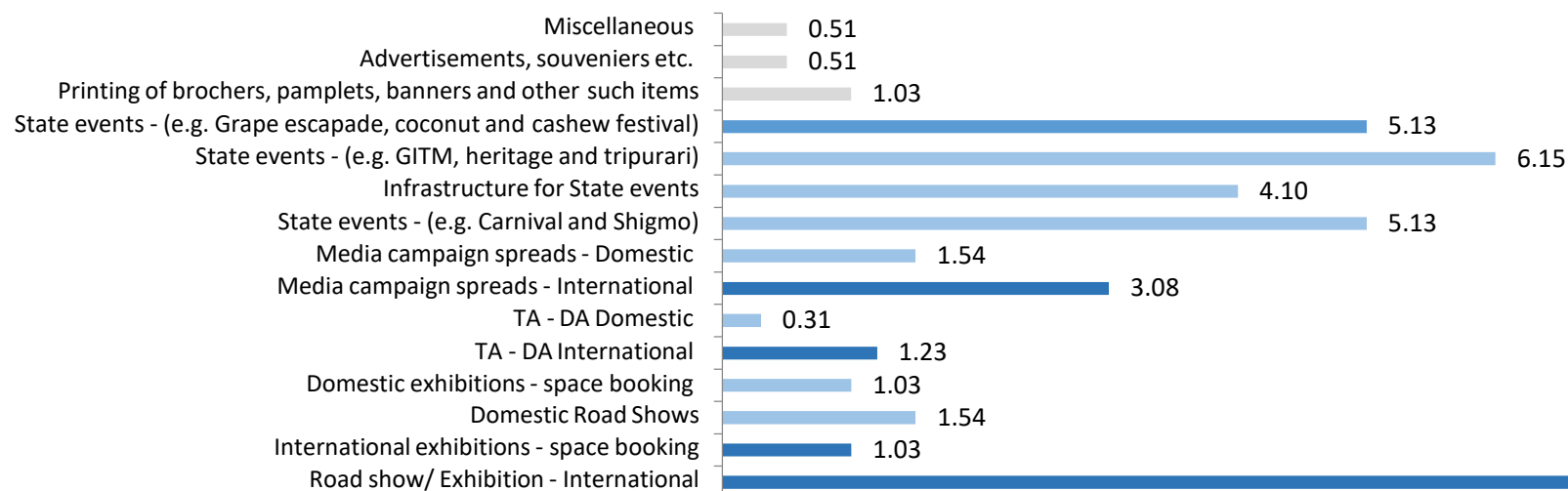


Promotion strategy - Goa's expenditure in marketing & promotion

	International Arrivals	Domestic Arrivals	Total	International Marketing Budget*	Domestic Marketing Budget*	Others*	Total in INR (*)	Total in US\$
2014	527,569 (13%)	3,530,657 (87%)	4,058,226	13.70 (34%)	24.30 (61%)	2.00 (5%)	40.00	611,515
2015	541,480 (10%)	4,756,422 (90%)	5,297,902	14.04 (34%)	24.91 (61%)	2.05 (5%)	41.00	733,800

Detailed Marketing Budget FY 15/16

* Amount in '000,000 (INR)



Tourism Marketing budgets Goa

- The overall budget has been increased by 21% from 2014 to 2015, in line with total arrivals growth
- Marketing budget is today oriented to promotion of domestic tourism (61% of total expenditures), as this market represents 90% of total arrivals.

Promotion strategy - Benchmark on marketing expenditure

	Foreign Arrivals per year	Average Marketing Budget (USD)	Average marketing spend per arrival
1 Large Destinations (e.g: France, Spain, China, Italy, UK)	+ 50 M	50 M	1 USD or less
2 Medium Destinations (e.g: Malaysia, Mexico, Germany)	+20 M	40 M	3-4 USD
3 Small Destinations (Costa Rica, Cyprus, Malta)	+2 M	15 M	5-6 USD
4 1 M Less Destinations	1 or less M	5 M	7-8 USD
5 Goa	0.5 M	0.57 M	0.4 USD

Key takeaways

- Countries with large amounts of international tourists arrivals spend around 1 dollar per arrival though they have the highest budgets
- In second-tier volume tourist destinations, the less tourist arrivals, the more average spending per arrival reaching around 8 USD
- Goa needs to invest a larger amount in international budget in order to get closer to the average spending. Nowadays it seems to be far away from the standards: 0.4 US\$ versus 5 to 8 US\$ per arrival in comparable sample of destinations
- On the other hand, it is true that this highest spending needs to be mitigated because India's marketing budget would to a certain extent cover this need, as it promotes the country as a whole

SWOT on Goa's Marketing Promotion & Communication

Strengths

- High brand recognition among domestic tourism
- High brand recognition among international tourism for Sun & Beach, Nightlife and "Living Life to the Fullest" way of life
- Recent brand change
- Land of contrasts with wide range of offerings to be promoted, easily reachable due to short distances
- Website oriented to direct sales of specific products and availability of destination app
- Marketing expenditure addressed to both domestic and international markets

- Availability of Multiple Tourist Products & Resources to Develop Goa into a Top Destination
- Promote tourist arrivals from markets with high number of arrivals in India but low for Goa (USA, Canada)
- Attract tourists by launching a segmented communication by travel motivation and nationality
- Develop a strategy for marketing and communication by product
- Take profit of social media marketing to increase awareness and personalization without relevant additional spending

Opportunities

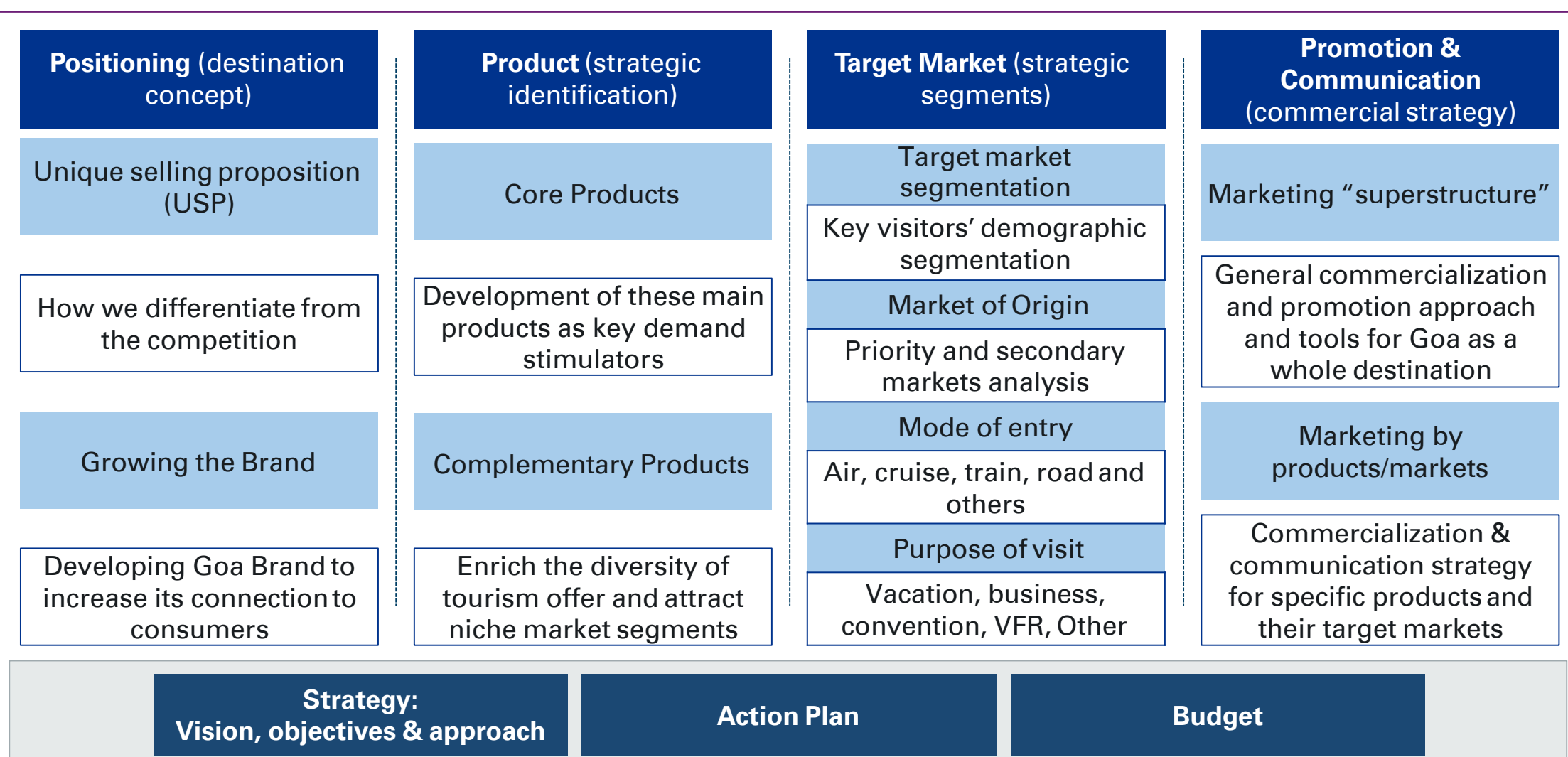
Weaknesses

- Brand positioning not clear; some of the brand attributes are not conducive to attracting high-end tourists.
- **Low marketing budget**
 - Active promotions and focus on emerging tourism centers such as China by Bali tourism have helped in achieving a large growth in tourists.
 - Catalan Tourist Board has redefined its mission and vision in order to lead Catalonia's tourism development and marketing and achieve the goals of increasing tourist revenues

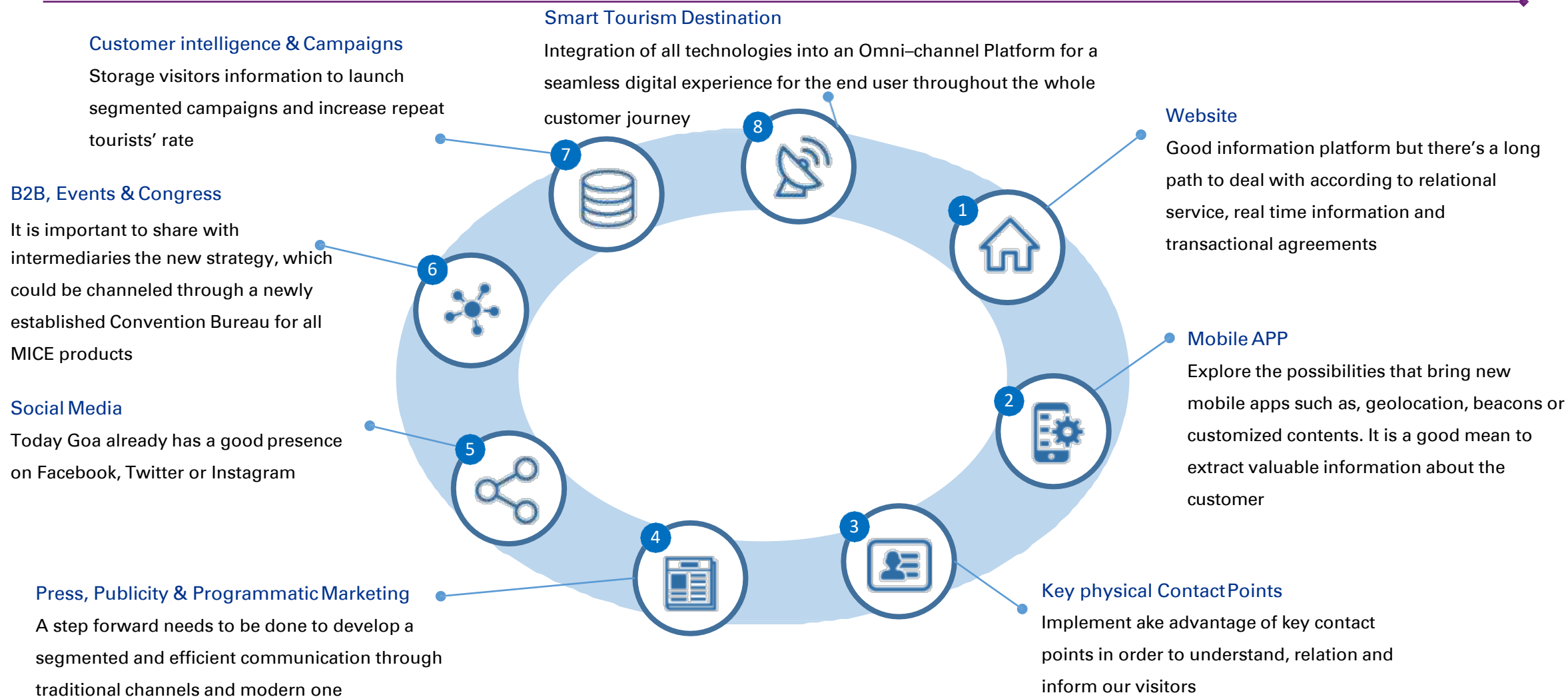
- Several Indian states are running aggressive international marketing campaigns and have potential to compete with Goa (Kerala is today the strongest competitor using aggressive and focused marketing & promotion techniques)
- Visibility in trade shows is increasing significantly for several Indian states
- e.g. "Barcelona is Much More" campaign gives reasons a tourist should visit the region of Barcelona and not only the city

Threats

Marketing Plan



Marketing Destination Goa as a whole: Proposed approach





1 Marketing GOA Destination - Website

It is the destination image on the internet and a commercialization tool. This website has to be **dynamic, interactive and efficient** for visitors but also useful for tourism stakeholders. The website should be structured by a tourism product menu, gathering all services that support the visitor motivations.

Frequent actions to be done

- Update the website periodically to maintain the quality of the information and use the latest technologies
- Propose a page with recent **news of the tourism industry** and of the country on the website
- Create a **restricted area** for professionals and press
- The website should be adapted to the different **key customer segments** (language and design preferences)
- The website should be available from all main **searching engines** optimization (SEO) (Google, Bing, etc)
- Visitor **reports** and **statistics** should be extracted each month of the website in order to verify the frequency of visits and the visitor characteristics

Website of the future

The web 2.0 is a **channel of communication** between all stakeholders and new formats and tools will arrive to enhance and improve the experiences. It will be a key factor of success to keep marketing updated on all opportunities coming from innovative technologies



Digital Travel Planner



Photo sharing, interactive maps, wikis, widgets...



Forum where customers share its experience



Real stories of real customers (Malaysia web)



1 Marketing GOA Destination - Website evaluation

</							

- Goa's website is focused on providing basic information to visitors. There's a low developed section that offers packages and accommodation to customers
- Relational services such as social media connection, newsletter or visitors blog are still to develop
- There's also a progress area in Real Time Services



2 Marketing GOA Destination - App

Mobile applications offers Goa a new relationship channel with customers and stakeholders. This new channel includes a wide range of new possibilities to interact with customers, build awareness, improve loyalty and strongly complement their whole experience.

App technology solutions

- Real time information such as social media, tourist information (traffic, events), advertising or reminders
- Vehicle tracking (bus , metro, taxi, shared cars)
- NFC tags and QR codes to access information about nearby points of interest
- Tourist Complaints Management System
- Multi-languages travel guide app which also offers available packages
- Proximity marketing with beacons (special discounts, upgrades or cross selling)
- Customized digital contents (self segmentation)



Proximity marketing



Use of beacons



Customized digital contents



Interactive Audio guides

Current Goa's app has a great potential to develop. It seems to be an information platform with some useful services like checking availability in hotels or calling for a cab. **It should move towards a digital and relational platform in order to improve customer experience and loyalty.** Moreover this platform should enable gathering valuable information from visitors



3 Marketing GOA Destination- Key contact points

Today tourism information offices should not be only attended by physical persons but greatly complemented by virtual and interactive “offices.” It is important to place them in strategic points such as airports / train stations / ports, famous attractions or hotel areas. These virtual information points become also strong cross selling marketing tools throughout the destination

Strategic methodology

Sign Location

Target

Needs

Mission

Others

- By knowing the locations of your signs, you will also be able to consider in the environment of the sign
- Identify your main audience and understanding exactly who you are creating content for. Measure how long will be your audience in front of the sign
- Do they need information to guide them? To educate them (tech them about products / services)? To entertain them?
- What do we want our visitors to do? (follow our social media, buy a product, visit a sight). Call-to-actions should be include in our content
- Content change frequency, who creates the content, brand voice / message guidelines...





4

Marketing GOA Destination – Press, Publicity & Programmatic Marketing

Press & Publicity: Activities should be developed to communicate the tourism offer, the products and the brands to targeted audiences. In the case of Goa, it seems important to focus on the accessibility of information to journalist and also to create advertisements available to the corporate sector. Moreover, it is increasingly important and cost-efficient to use more online materials and campaigns rather than offline and physical promotion materials and campaigns. Though, offline promotion cannot be eluded.

Specific actions

- Press trips
- Media database (gathering information on international travel writers and journalists)
- Resource library including photos, brand imagery, video clips of local attractions, photo CD
- Press clipping
- Targeting on specialized press and journals to place effective advertising
- Newsletter to international travel writers and journalists
- Strategy for celebrities, key opinion leaders or travel bloggers (strong influencers)



Travel bloggers



Effective online press room



Target and segmented publicity



4 Marketing GOA Destination – Press, Publicity & Programmatic Marketing

Programmatic Marketing: target what types of audience you wish show your advertising to. Which can encompass segments across demographics such as age, gender, social standing, to geographic in certain areas of the country. You can also limit the ads to times of day and frequency, decide which publishers you want your ads to show on. **This way you are only paying for highly effective ads, delivered to the right people at the righttime**

Strategic methodology

DSP selection

Data partners selection

Metrics

Creativity

Post – Buy analysis

- The path to programmatic begins with the choice of your demand-side-platform (DSP). good DSP must be transparent in their capabilities and data sources
- A data partner should be able to clearly articulate the value of their data and how it will assist you in targeting your campaign to achieve your KPIs
- Upon setting the KPIs for any individual campaign, you should then work backwards from your goals to see which measurements align
- Programmatic is all about delivering the right message to the right audience at the right time. Creativity is capital
- The programmatic opportunity can only be fully exploited if there is a strong post-campaign reporting and analytics system

Example

1. **Target:** Germans between 25 – 35
2. **Product:** Nightlife and Beach&Sun
3. **Promotion:** 20% less on early booking



- **Filter:** target with travel & leisure cookies last month
- **KPIs:** click on ad, visit main page, booking

Goa's Marketing superstructure – Press, Publicity & Programmatic Marketing



Design of relevant marketing collateral is essential to support the selling and promotion of products. A specialized team should be in charge of building this type of materials and a strategic promotion plan must be designed to give vitality through the different promotion channels

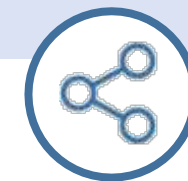
Types of collaterals

- Sales brochures and other printed product information
- Visual aids used in sales presentations
- Web content (photos, 360° views, video)
- Sales scripts
- Demonstration scripts
- Product data sheets
- Product white papers
- promotional pictures










Kerala's collaterals in website and social media

5 Marketing GOA Destination- Social media

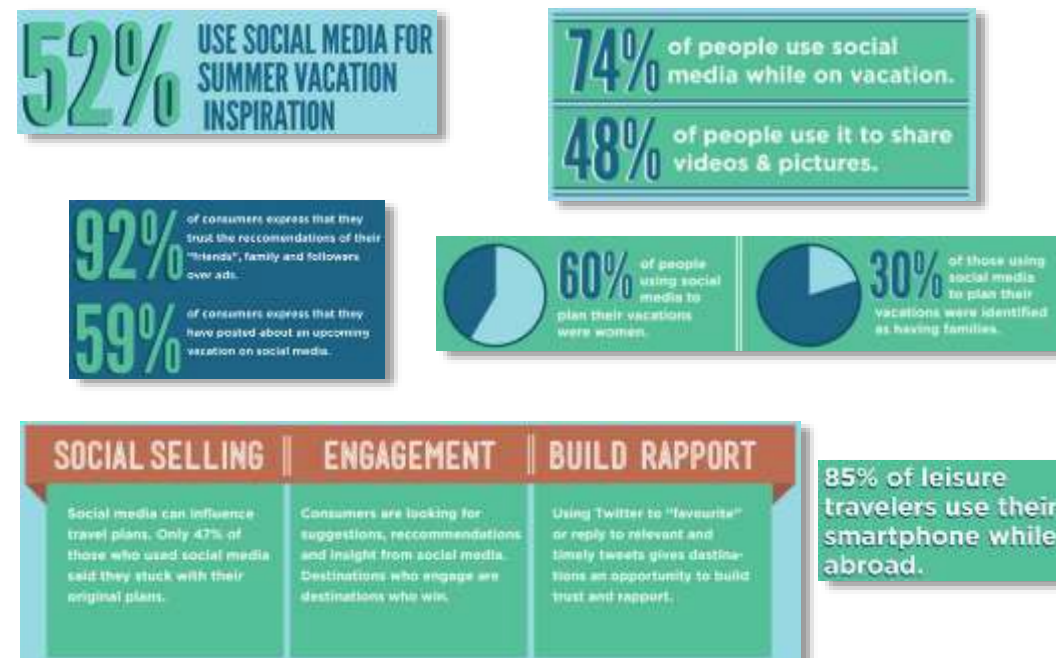


Social media is the one of the key areas for destination marketing managers. GTDC should actively encourage user content about destination and integrate it in its own channels. One of the most important factors that we take into account when planning a trip is friends recommendations. Social media is plenty of these recommendations and that's why Trip Advisor is one of the decisive stakeholders of our time

How to measure success in social media

-  Number of visitors viewing user-generated content (UGC) on the website
-  Number of visitors viewing UGC on third party sites
-  Number of identified blogs that support the destination
-  Blog activity
-  Tags / Hashtags
-  Volume of tags that include optimization engines keywords with presence in websites from priority markets
-  Specific statistics, such as "Trending topic" or number of "retweet"

Some inspiration facts



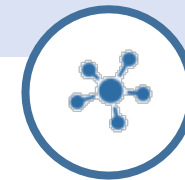


5 Marketing GOA Destination- Social media

Kerala is the destination that spends more effort on social media means. However Goa is already performing well in this field

	Sri Lanka	Bali	Ibiza	Kerala	Maldives	Mauritius	Thailand	Goa
1 Facebook (page likes)	6.033	903	23.420	1.284.078	NA	38.235	39.146	615.468
2 Twitter (followers)	1.149	11.200	14.700	70.300	12.600	15.400	70.400	30.200
3 Instagram (followers)	59.300	4.000	13.900	57.900	42.400	NA	52.700	20.300
4 Youtube (channel subscriber)	529	NA	52	18.440	NA	NA	2.045	618

6 Marketing GOA Destination – B2B, Events & Congresses

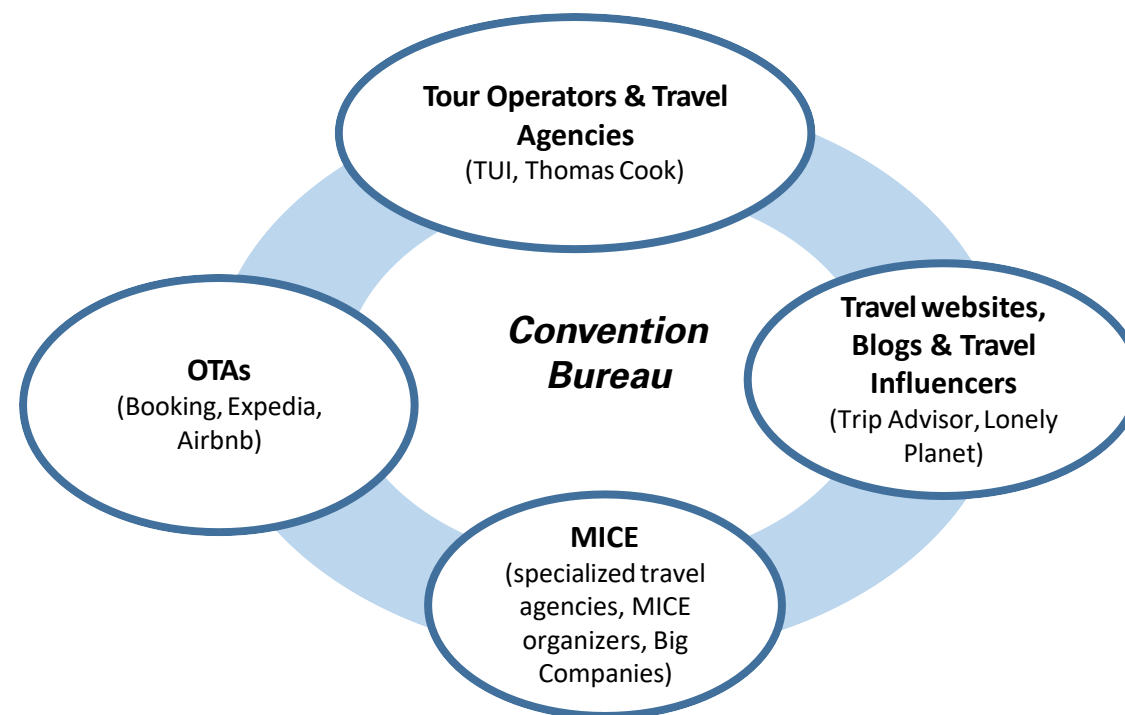


To develop an international tourism marketing and representation network is crucial for Goa's performance for the next years. It will market and promote Goa tourism at the market origin, inform the customers and intermediaries on their travel possibilities and the tourism offer in Goa

Objectives

- Definition of office/representation model: according to budget and market priorities, the first step is to define the kind of office model among the following options: BTB satellite offices, Tourism Trade Representative, Destination Marketing or PR Company
- Selection of source markets for offices: identification of priority markets and specific locations (cities), where to settle the defined marketing office
- Assessment and revision of network map every 4 years, in order to optimize efforts and resources, redefine the priorities and office models, according to trends, market's changes and competitiveness situation

B2B stakeholders





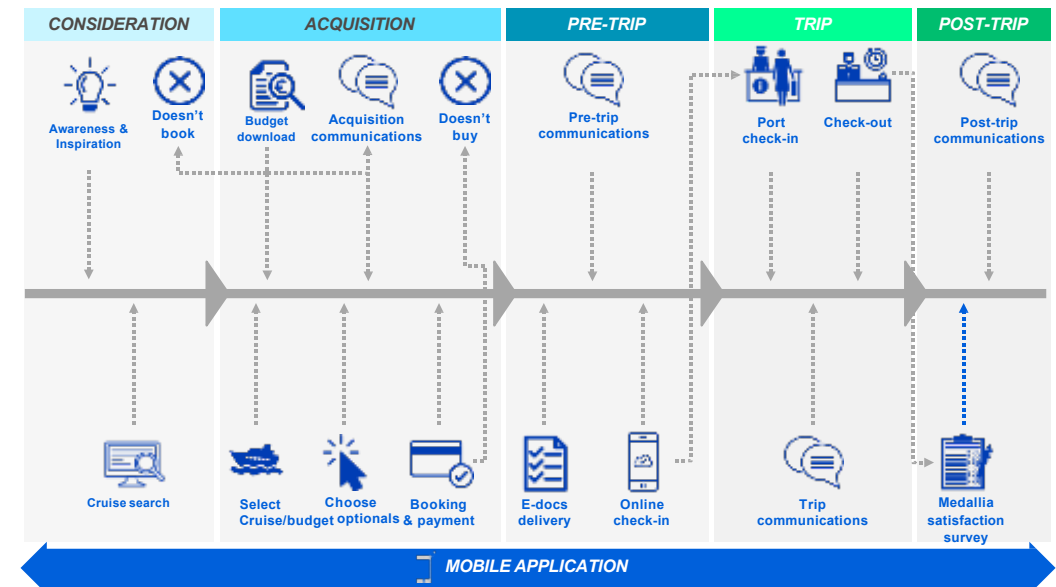
7 Marketing GOA Destination- Customer Intelligence (CI) & Campaigns

Identify actions which will be dedicated to further research and target Goa's loyal customers and repeat visitation, to improve destination experience. It is also important to encourage and facilitate active recommendation of our destination, even on behalf of non repeat visitors. This project will provide inputs to the Marketing Intelligence System and it is based on the idea of being a software user.

Objectives

- Develop a customer relationship management in order to save financial resources and enhance the loyal visitors' profitability rather than constantly targeting new visitors and new target markets
- Manage the CRM via an IT system which would collect and organize the different data collected about loyal customers
- Manage the platform to distribute personalized information to customers such as newsletter, special offers to instate a link with them and stimulate repeat business
- The CRM system should monitor the use and enjoyment of the new products

Customer journey map



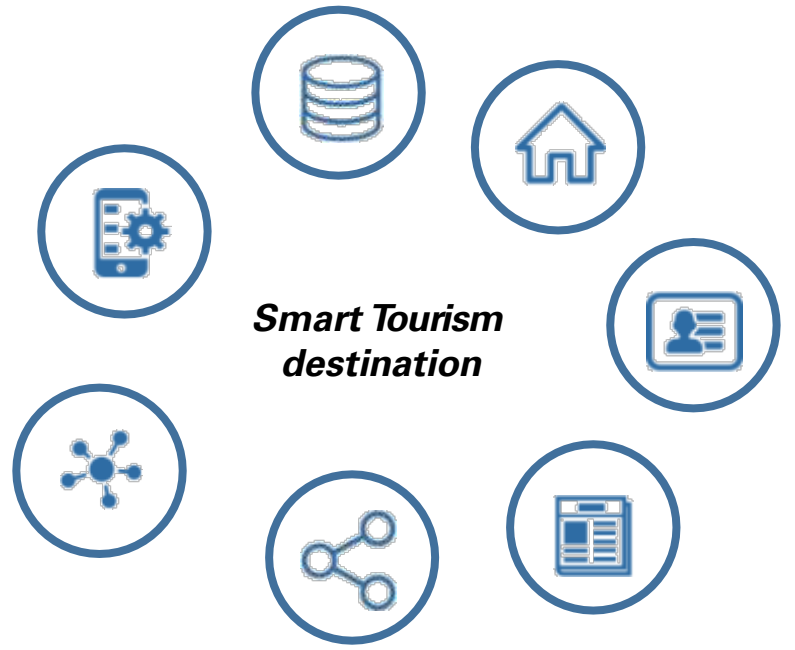
Customer journey analysis allow us to identify every touch point with our visitors. We should decide which information is critical to collect for future campaigns and reporting

Marketing GOA Destination - integrating it all into a "Smart Tourism" Destination



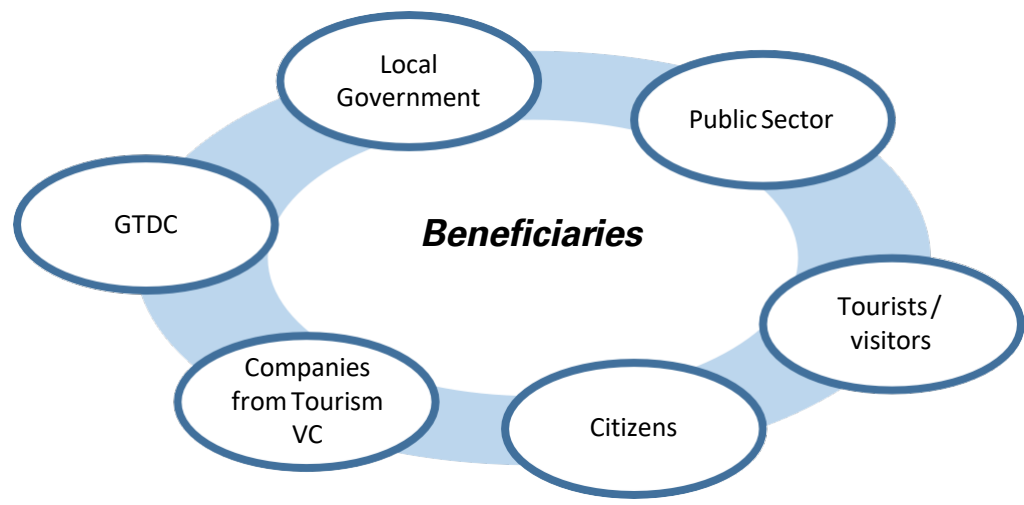
Bringing **Smartness** into **Tourism Destinations** requires dynamically **interconnecting stakeholders** through a technological platform on which information relating to tourism activities could be exchange instantly. This integrated platform is having multiple touch points that could be access through a variety of end-user devices which will support the creation and facilitation of **real-time tourism experiences** and improve the effectiveness of tourism resources management throughout the destination at both the micro and macro level.

Integration of different technologies into an omni – channel tourism destination



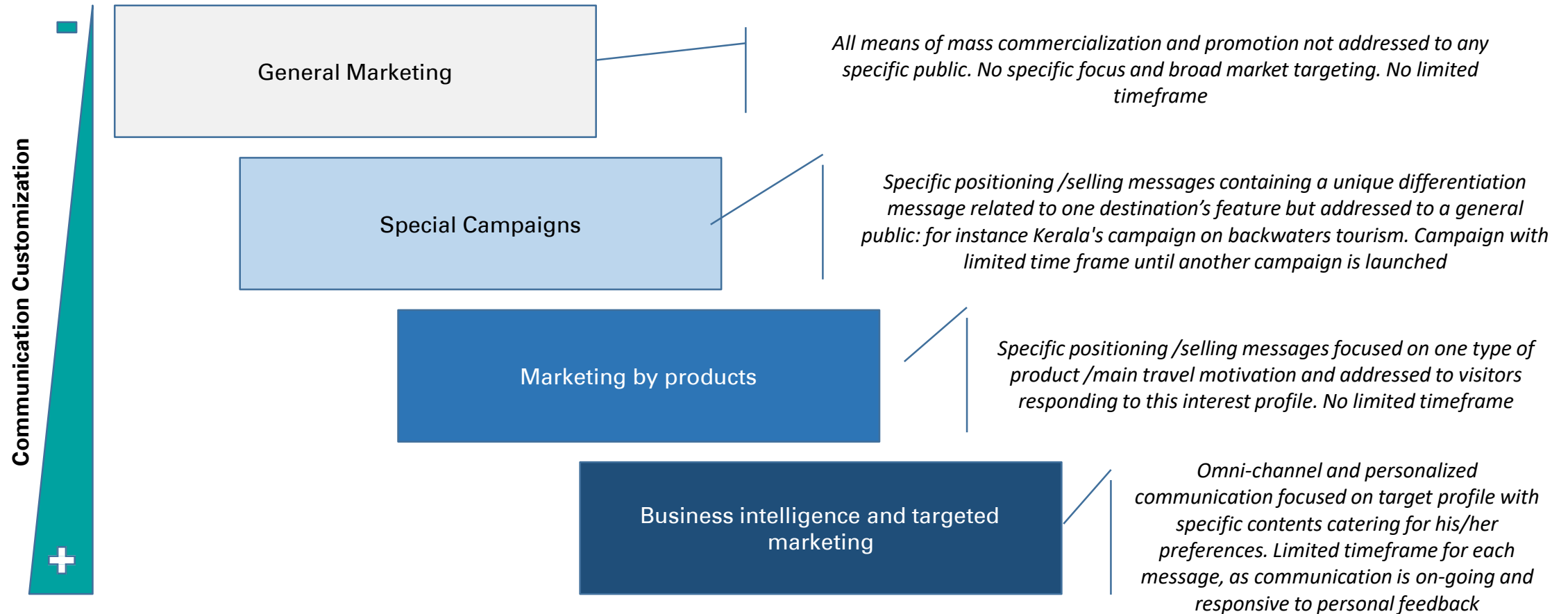
Smart Tourism Destination beneficiaries

Tourists are not the only ones taking advantage from innovation. Many stakeholders involved in the process of creating Smart Tourism Destination are also gaining benefits



Types of destination marketing and customization level -

Key take-away



Building awareness among local stakeholders: A key success factor

Sustainable tourism development in Goa is a responsibility of everyone: civil society, public and private sector. Campaigns with state coverage should be undertaken to inform citizens and raise their awareness on the importance of tourism and tourism hospitality. In addition, a civic pride campaign should promote the uniqueness, protection and the importance to conserve the national Natural and Cultural heritages of Goa (either monuments or living culture and nature) while encouraging Goans to travel and visit destinations within their Taluka and others.









Objectives

- Definition of different campaigns per year: identification of awareness needs and key audiences to tap; definition of goals and strategies; definition of messages per target and communication tools for each one; definition of seasons and days for domestic tourism campaigns.
- Define the strategic partners per campaigns, such as public-private partnership with local tourism companies
- Define implementation schedule of each campaign
- Define the financial schemes and alternatives for funding
- Monitoring system for campaigns

Types of campaigns

- **Goan pride**: encourage domestic travels within the state in order to transmit the importance for Goans to know and feel their State
- **Tourism awareness in schools**: promote the importance of tourism for the State of Goa among young people and highlight the career opportunities in tourism
- **Community awareness**: This action could help the community to understand the need of the tourism industry in Goa and the benefits of this industry to the local community
- **Sustainable tourism awareness**: This project plans and programs on sustainable tourism for the population of the tourist destinations aimed at promoting and disseminating a culture which respects environment, natural resources and the cultural heritage of the country, by strengthening the national identity and pride
- **Goan hosts**: This project develops training programs on customer service techniques for staff not directly employed in the tourism industry but who have contact with tourists.

Promotion & Communication - Key take-aways

	Website	Use the web with the aim to build the brand, obtain awareness, attract new customers, transmit experiences and gather useful visitor information. Focused efforts are needed on new and updated content to align with new positioning and products
	Mobile App	Utilise advantages offered by Mobile App technologies like proximity marketing (partnerships), use of beacons, customized digital content or real time information. 85% of visitors use their smartphone when travelling
	Key physical Contact Points	Place key physical contact points in strategic areas (airport, port, famous attractions...) in order to guide, inform, educate and improve visitor experience
	Press, Publicity and Prog. Mark	Change advertising / publicity strategy into a cost – effective, targeted and experiential advertising plan
	Social media	Goa's social media performance needs to be continued. Focus on quality of materials (video sharing, photos), interaction with visitors and gathering information about them
	B2B, events & Congress	Define and establish a consistent plan for all intermediaries, from OTAs to specialized agencies.
	Customer Intelligence & Campaigns	Goa needs to know more about its visitors and launch campaigns in order to increase revenue (repetition, upgrade, cross selling), improve experience and increase loyalty including visitors' proactive recommendation to other potential tourists
	Smart Tourism Destination	All the above tools should be integrated with each other and share valuable information and bring the visitor a modern omni – channel destination marketing that give quality experiences

In order to increase not only the volume of higher spending tourists but also to boost international tourism, Goa will need to invest more and dedicate a higher % tage today of its marketing budget to international marketing and promotion

Best practices in marketing & promotion for international tourism

As one of the most important objectives for Goa is to increase the volume of higher spending tourist ans also international tourism, a benchmark has been conducted in order to identify the best practices in promotion and communication of a certain destination to capture international markets. We have identified some actions that could be implemented in the Goa context, though it is a selection and not an exhaustive approach.

Selection of benchmarks

Countries:

Canada
Mauritius (competitor)
France
Sri Lanka (competitor)

Regions:

Balearic Islands
Kerala (competitor)
Bali (competitor)



Best practices combine traditional approach and new ways

Traditional approach		Exhibitions & Fairs	One of the most traditional tools to promote a destination. Could be divided into Generic and specialized
		Fam Trips	To generate direct business (tour operators, VIP travel agents, meetings organizers, other intermediaries) and also to indirectly promote the destination through tourism influencers (Indian and foreign celebrities, travel bloggers, etc.) know our destination so that it can then advertise and market
		Workshops	Enable Goan tourism sector professionals to market their offer and learn new strategies to position and promote their product
		Presentations	Specific actions organized to present and promote Goa as a tourist destination. These presentations are addressed either to professionals or to the end tourist
		Network of Offices	Tourist promotion offices in the target countries. Three different ways to do it: being part of India's tourist office, hiring third-party enterprise or owning an exclusive GTDC office
Non Traditional		Social Media	The goal is to use social media as a meeting point between Goans, to share their knowledge and become prescribers of destination, and at the same time, it is the platform for travelers to explain their experiences lived during their trip to and stay in Goa
		Partnership	Agreements with local and/or foreign enterprises to promote and commercialize Goa's product offer together. The selection of those partners need to follow an accurate process and need to share basic principles and values in line Goa's tourism vision and mission



Goa should selectively attend the most important fairs & exhibitions in the main target markets with the lowest possible investment

Description

Over the course of the year, the GTDC should attend to the most important events, which can be divided into two categories: specialist fairs and generic shows. Priority target markets should be taken into account in the selection (Domestic, France, UK, Russia, Germany and Middle East)

Target



Intermediaries



Press & Media



Influencers



Professionals



Visitors

Most important Exhibitions & Fairs by target country



UK: World Travel Market (London)



Germany: ITB (Berlin)



France: IFTM – TOP RESA (Paris)



Russia: MITT (Moscow)



Middle East: Arabian Travel Market (Dubai)

Fairs specialized in particular products

The GTDC should also participate in shows and fairs that are specialized in particular products (active, golf, nature, culinary and business tourism, for example) as part of a clear strategy aimed at segmenting the Goan tourist industry. Some examples for illustration purpose only:

- Business: IMEX (Frankfurt – Germany)
- Culinary: Gastronomic Forum (Spain)
- Nature: British Birdwatching Fair (Oakham – UK)
- MICE: IBTM World
- Culture: Art & Tourism fair Italy



Making a good choice of influencer individuals can be decisive in Goa promotion and communication strategy

Description

Trips are efficient, direct promotional tools that are used to enable participants to familiarise themselves with the attractions of Goa at first hand. These include both generic visits to the destination and specific tours focusing on particular territorial brands or product types

Target



Intermediaries



Press &
Media



Influencers



Professional
s



Visitors

Types of Trips

- ✓ **Fam trips:** Familiarization trips for intermediaries have the objective to enable operators to gain first-hand knowledge of Goa's tourist attractions, encouraging them subsequently to programme the country as a destination in their catalogues and on their websites
- ✓ **Press Trips:** the objective is to give journalists and media the chance to experience at first-hand the sensation of visiting Goa so that they can later inform about this in their respective channels
- ✓ **Influencer Trips:** influencers (bloggers, youtubers, instagramers, celebrities...) that are invited to come to Goa so that they promote the destination on Internet and through the social media (blogs, Twitter, Facebook, etc.) during the visit itself





It is capital to propose continuous training to Goan tourism professionals in order to build a strong offering and individual businesses' promotion skills

Description

Workshops are marketing and promotion actions whose purpose is to facilitate business meetings between enterprises from the Goan tourist industry and tour operators who work with or are interested in working with GTDC

Target



Intermediaries



Press &
Media



Influencers



Professional
s



Visitors

Types of workshops

- ✓ **Direct Workshops:** are organised in countries of particular interest to the Goan tourist industry. In such cases, Goan businesses visit the country where the workshop is taking place and, aided and advised by the GTDC, hold meetings with local tour operators
- ✓ **Reverse Workshops:** take place in our country. In this case it is the tour operators that, invited by the GTDC, come to Goa to hold pre-arranged meetings with Goan businesses. In most cases, such workshops are also accompanied by fam trips
- ✓ **Other:** At other meetings abroad, organized by third parties, the GTDC takes part alone, presenting Goa as a destination and assessing whether to organize specific actions in the markets involved



Presentations include all merchandising materials to promote the destination and share useful information



Description

Presentations are one-off actions that the GTDC should organise to inform about Goa as a tourist destination. They are divided between those restricted to the professional sector and those aimed at end consumers

Target



Intermediaries



Press &
Media



Influencers



Professional
s



Visitors

Types of Presentations

- ✓ **Professional sector:** These presentations are promotional actions organised for industry professionals by GTDC and staged in the target group's country of origin (Russia, UK, Germany, France)
- ✓ **End Consumers:** The GTDC could also organise promotional actions to inform end consumers about the diversity of Goa's tourist attractions. These actions usually accompany activities, performances and shows staged in the street to showcase traditional Goa culture and cuisine

* Those presentations include the design and creation of all support material (brochures, videos,)



In a future stage, GTDC could consider the opportunity of strengthening its presence and actions through a network of "offices" in key markets abroad



Description

Taking into account all resources expenditure, it is important to maintain some tourism information offices in the main target markets

Target



Intermediaries



Press &
Media



Influencers



Professional
s



Visitors

Future: GTDC Network Offices

- **Objective:** The mission of the GTDC offices abroad is to publicize the range of tourism options available in Goa and to position the brand by lobbying in the markets they cover. Their other core function is to give direct support to Goan tourism enterprises in their promotion efforts. In addition, they identify and analyze the trends in demand in each market to ensure that the GTDC marketing strategies for the international markets are based on full and accurate information
- **Services offered:**
 - Maintain fluid dialogue with agents in each market: tour operators, companies, media, etc
 - Conduct in-depth studies of each market in their particular sphere and to identify new products and offers
 - Benefit from the technical assistance to the Goan tourism industry and support on marketing, promotion and information
 - Access to market data

Types of offices

Option 1:
India's
Tourism
Government
Office

Hiring a permanent employee to be located in the India's tourism office of the main target markets

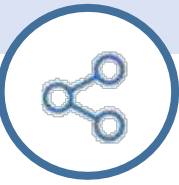
Option 2:
Third Party
"Office"

Hire local representative company specialized in promotion and public relations

GTDC own
office

Establishing an office on its own with a minimum structure in some key countries could be an option in the future

Social media is the most powerful tool to promote, communicate and obtain awareness for a destination



Description

Social Media needs to become a focal point for Goans, as a place where they can share their knowledge and become opinion leaders about the destination, and for visitors, offering them an opportunity to describe their experiences during their trips to Goa

Target



Channels tips



Find up-to-date information, weekly recommendations, competitions, activities, discounts and promotional offers



Publicise the very latest news about the Goa tourist industry. It is specially important to use that channel to interact with followers



People can take representative photos of Goa and post and share them with millions of users who have this app. It is the first social network for mobile photography



View and share a large volume of inspiring material on the various destinations in Goa, and also encourages interaction through the comments made by users

Best Practice: Kerala



Main figures	Social key	GTDC use
Page likes: 1,296,403 People talking about: 25,979	Sharing	Real Time
Followers: 106,000 Tweets: 22,700 Photo & Video: 6,133	Real time information	Real Time
Followers: 61,100 Photo & Video: 619	Instant Photo Gallery	Experience
Subscribers: 19,369 Views: 15,270,723	Video share and comment	Promotion

Cooperation and even “co-opetition” are powerful tools to promote and communicate Goa abroad



Description

Teaming up with partners is a basic tool to promote the destination and have a wider channel to communicate our products at a lower cost. Both partners need to benefit from the collaboration

Target



Types of partnership

Air companies	Local and foreign companies with direct flights or charters
Celebrities	Depending on the market, make a selection of celebrities that share our values to promote our destination
Other Indian States	Cooperate with other states to promote circuits in India and potentially share promotion costs abroad – “co-opetition” means collaborating with competitors
Film making	Many Bollywood films are being filmed in Goa. Good opportunity to promote the destination
Tourism Intermediaries	Agencies, TTOO, OTAs, collaborative tourism (Airbnb for small individual tourism accommodation)
International Quality labels	Certification companies focused on the specific products that Goa wants to enhance and promote

Possible Partners



Marketing by products / markets: A new way forward

Now that Goa wants to focus on several products, a strategic marketing by products needs to be developed. The advantage of Marketing & Promotion on specific products is that can be done mainly through direct marketing based on specific experiences.

Target

1. Individual end user
2. Specialized Tour Operators (offering segmented experiences)
3. Associations & Clubs of members for a specific activity

Promotion tools

1. Sample itineraries
2. Social media
3. Influencers blogs & fam trips
4. Advertising in specialized websites for each activity
5. Attend specialized trade fairs and congress



Horse riding Trips



Cuisine Holidays



Golfing Holidays



Rail Holidays



Cultural & Art Holidays



Painting Holidays



Photography trip



Bird watching trip



Cycling holidays

Marketing by products / markets: Creating Marketing Clubs

It is important to develop product clusters of public and private tourism service providers sharing the same customer target, the same product market (nature tourism, cultural tourism, cruise tourism, etc); the same type or the same category.

Aims of the clubs are to structure the touristic offer and to help increase quality, in such a manner to provide easy marketable products and answer the expectation of the market customers. The quality is reached by a set of membership standards that have to be accomplished, if any company or destination wants to be part of the club

Tourism Product Club Development & Promotion

The following process proposed is adapted to obtain dynamic and attractive clubs to customers and companies. This project aims to create marketable and successful product clubs following the process below:

- Coordination of the initiative by a designated product manager
- Use of market studies to define adapted clubs to the industry and identification of club concepts with specific market needs
- Identification of company prerequisites to join a club – The club must welcome tourism companies and organizations with a minimum of quality requirement
- Identification of the activities and benefits of the club to members
- Selection of the different promotion channels for the club (brochure, roadshow, website, etc.)
- Management of the schemes and definition of roles
- Identification of the type of business to be represented and integrated to the clubs

e.g. The private sector plays a key role in promoting and selling tourism in Catalonia, and around the world.

Marketing by products / clusters

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Tourism product club development

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Marketing by products / clusters

Benefits of joining a Cluster

- Receive tailored marketing tools, reserved exclusively for members of each Cluster
- Have access to specific analysis and technical studies concerning the different products
- Be referenced as a member of the Club in GTDC site and dedicated pages (certification)
- Share financial resources for a greater impact on markets. Each cluster has a promotion fund constructed with members and other stakeholders contributions
- Adapt and evolve the different products taking into account the different trends and consumption patterns
- Share experiences and expertise with other professionals
- Participate in promotional actions proposed for specific Clusters
- Benefit from working with new market approach

Examples



Logos and certification



International Cluster operations



Action Plans



Advertising campaigns



E - Marketing



Photo & Video Gallery

Marketing by products / clusters

Action Plan example: Promotion of Cultural Tourism in Germany

Target	Objective	Actions
End customer (visitor/tourist)	<ul style="list-style-type: none"> ✓ Increase reputation of Goan Culture ✓ Retain and win visitors 	<ul style="list-style-type: none"> • Specific site for German visitors • Partnership with German companies related to Cultural Activities • Newsletter with cultural content • SEO campaigns with google adwords • Social media support (tweets, posts and links referencing Goan Culture)
	<ul style="list-style-type: none"> ✓ Increase visibility and reinforce brand image 	<ul style="list-style-type: none"> • Design a 6 pages advertorial in the supplement Simskultur to insert in different German magazines and journals: Der Spiegel, Focus, Arte Mag, Woman, Air Berlin, Der Standard
Professionals	<ul style="list-style-type: none"> ✓ Understand the German cultural tourism strategy ✓ Develop a Goan cultural programme and build relationships 	<ul style="list-style-type: none"> • Best Practice sessions with German professionals specialized in cultural tourism to understand the challenge • Workshop in Goa (visits, partnerships meeting, exhibitions)
Influencers and press	<ul style="list-style-type: none"> ✓ Increase brand awareness among German visitors 	<ul style="list-style-type: none"> • Familiarization (FAM) trip with a cultural route with careful selection of German influencers (travel bloggers, instagramers) and a good photographer

Marketing by products / clusters

Who participates and how is it organized

You could be member if you are a professional or a company related to the tourism sector and have a real interest to potentiate your business by collaborating with other partners and communicating and promoting Goa's brand around the world

GTDC Board

Cluster 1
Director

Cluster 2
Director

Cluster 3
Director

Cluster 4
Director

Members

Members

Members

Members

How is it financed

Active Member

Full access to all
materials and
sections

Price +++

Member

Limited access
to materials and
sections

Price ++

Associate

Minimum level
of membership

Price +

Example: France Cluster Action Plan

Culture

Actions	Cibles			
	PEOPLE	PRO	APPROACH	PRESENCE
Allemagne – Campagne France	X			
Allemagne – Journée Best Practice et workshop France		X		
Coût de participation : 1 500 € HT par partenaire				
Allemagne – Publi-rédactionnel supplément Simskultur encarté dans 6 magazines	X			
Coût de participation 3 851€ HT ou 7 031 € HT par partenaire				
Grande Bretagne – ImagineFrance à Londres	X	X		X
Grande Bretagne – Workshop pro et/ou presse		X		X
Coût de participation : 800 € HT par partenaire				
Italie – Workshop presse à Rome				X
Coût de participation : 800 € HT par partenaire				
Espagne – Accueils de journalistes et blogueurs				X
Espagne – Rencontre presse et pro au Centre Pompidou Malaga		X		X
Coût de participation : 800 € HT par partenaire				
Belgique – Accueils de personnalités et marketing d'influence	X			X
Coût de participation : 2 000 € HT par partenaire				
Japon – ImagineFrance	X	X		X
Japon – Atelier de formation		X		
Brazil – Etude de programmation		X		
Etats-Unis – Accueils de blogueurs et campagne	X			
Coût de participation : 1 400 € HT par partenaire				
Corée du Sud – ImagineFrance à Séoul	X	X		X
Corée du sud – Démarchage en groupe		X		
Coût de participation : 590 € HT par partenaire				
France Meeting Hub			X	
ImagineFrance	X	X		X
Coût de participation : 400 € HT par partenaire				
ImagineFrance#2	X	X		X
Coût de participation : 800 € HT par partenaire				

Coastal

Nom de l'action	Cibles				En synergie avec
	PEOPLE	PRO	APPROACH	PRESENCE	
Allemagne – Evénementiel Beach Club	X			X	
Allemagne – accueil de presse				X	
Coût de participation : inclus dans la contribution					
Grande-Bretagne – Campagne What's Your Tour de France	X				Campagne France
Coût de participation : inclus dans la contribution					
Grande-Bretagne – Evénementiel à Camden Beach	X			X	Synergie possible avec le Cluster Villes
Coût de participation : inclus dans la contribution					
Pays-Bas – Battle de blogueurs	X			X	Cluster Villes
Coût de participation : inclus dans la contribution					
Pays-Bas – Insertions dans Columbus	X				
Coût de participation : inclus dans la contribution					
Belgique – So Chic So France	X			X	Cluster Bien-être
Coût de participation : frais à la charge des délégués (2) : hébergement et vols intérieurs					
Belgique – Campagne webmarketing Inspiration	X				
Coût de participation : inclus dans la contribution					
Belgique – accueil de blogueurs				X	
Coût de participation : frais d'accueil					
Brazil – Workshop Rio de Janeiro & démarchage/formation à Sao Paulo		X		X	
Coût de participation : frais à la charge des délégués (3) : hébergement et vols intérieurs					
Suisse – tournée médiatique à Zurich et à Lausanne					
Coût de participation : frais à la charge des délégués (2) : hébergement et vols intérieurs					
Suisse – Insertions dans le supplément spécial « Vos vacances en France »		X			
Partenariat avec le journal 24 H					
Coût de participation : 2 250 CHF 1/2 page*; 4 500 CHF page; 8 500 CHF page					
Suisse – Insertions dans le supplément spécial « Ihr Ferien in Frankreich »		X			
Partenariat avec le journal COOP					
Coût de participation : 2 250 CHF 1/2 page*; 4 500 CHF page; 8 500 CHF page					
Espagne – Campagne webmarketing littoral	X				
Coût de participation : 1 500 - 2 000 €/partenaire					
Italie – Campagne webmarketing	X				Campagne France
Coût de participation : 1 000 €/partenaire					
Enquête sur les clientèles sur le littoral au printemps et en été					
Coût de participation : 500 €/partenaire maximum/ vague d'enquêtes sur une base de 12 participants					
Projet fédérateur					
Coût de participation : 1 200 €/partenaire maximum sur une base de 14 participants					

Nature

Nom de l'action	Cibles				Budget
	PEOPLE	PRO	APPROACH	PRESENCE	
Allemagne – Sondage professionnels		X			
500 € HT : inclus dans la contribution					
Allemagne – Workshop France et déplacement		X			
5 000 € HT : inclus dans la contribution					
Allemagne – Livret Workshop France		X			
1 500 € HT : inclus dans la contribution					
Allemagne – Newsletter professionnelle		X			
1 000 € HT : inclus dans la contribution					
Allemagne – Accueil de presse				X	
2 500 € HT : inclus dans la contribution					
Allemagne – Accueil de Steven Hill	X				
7 000 € HT : inclus dans la contribution – accueil sur place à la charge des participants					
Allemagne – Newsletter presse				X	
2 500 € HT (valorisation) : inclus dans la contribution					
Allemagne – à la carte « Marathon de Berlin »	X				
9 050 € HT : 1500€ HT à la charge du Cluster et 7 550 € HT à la charge des participants					

Marketing by products / clusters

Product club development manual

This guide book should be developed by the public and private organizations taking part to the clubs in order to match the expectation of each side.

It should be available in hand and soft copy.

The manual has to be developed once according to the Goan characteristics. Then every new club can develop their own Club manual, following all the guidelines from this book. Clubs should have a guide of the operational and legal procedures and practical information.

Each procedure will define how to achieve the tasks of the clubs such as:

- Market study and identification of market opportunities
- Process of club creation: key values and concepts for the club, business model, benefits and value added for members and clients, etc.
- Management and operation procedures
- Evaluation and follow up of the club results



Cultural Clubs



Honeymoon Clubs



Nightlife & Entertainment Clubs



Gastronomic Clubs

Budget - Benchmark

We have analyzed the different international promotion Budget of some reference countries, some of them being Goan competitors.

In relation with that benchmark, Goa is very far from the average marketing investment standards. Therefore, it would be advisable to consider 8 US\$ per visitor spending as a reasonable figure in order to position Goa's brand on the international market and capture solid and sustainable tourism business able to achieve the quantitative objectives for tourism arrivals

Benchmark (*)

Country / Region	International Budget aprox. (\$)	Foreign Tourist arrivals	Expenditure per arrival
India	26,250,000	7,600,000	3.45 \$ / arrival
Mauritius	11,600,000	1,050,000	11.04 \$ / arrival
Sri Lanka	5,600,000	1,800,000	3.1 \$ / arrival
Dominican Rep.	62,000,000	4,000,000	15.5 \$ / arrival
Ecuador	11,000,000	850,000	12.9 \$ / arrival
Goa (current)	260,000	500,000	0.52 \$ / arrival

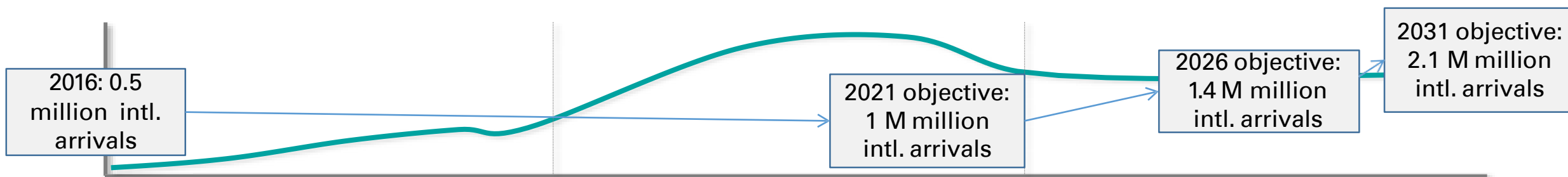
(*) Marketing budget data currently unavailable for Kerala

Budget - Proposal - rational

In order to reach \$8 visitor in a 5 years period, a gradual increase in international marketing and promotion is proposed. In the first stage we are going to focus in the construction of the main products selected. Then, in a second stage, an aggressive campaign should be implemented with the purpose of promote and position the main products. The final stage focuses on consolidate the marketing strategy and stabilize in the average \$8 per visitor

Phases

Phase 1 - CONSTRUCTION	Phase 2 - ATTACK	Phase 3 - CONSOLIDATION
Period 2017 - 2019	Period 2020 - 2021	Period 2022 - 2031
Average expense: US\$ 3 per visitor	Average expense: US\$ 10 per visitor	Average expense: US\$ 6 per visitor



Budget - Proposal - resulting investment patterns

	International spending in US\$	National spending	General Marketing
Current	US\$ 0.52 visitor	US\$ 0.08 visitor	US\$ 30,600
2017	\$ 1 visitor	Minimum 1 US\$ per visitor	Increase (to face new technological spending)
2018	\$ 2 visitor		
2019	\$ 4 visitor		
2020 - 2021	\$ 10 visitor		Maintain
2022 - 2031	\$ 4 visitor		Maintain

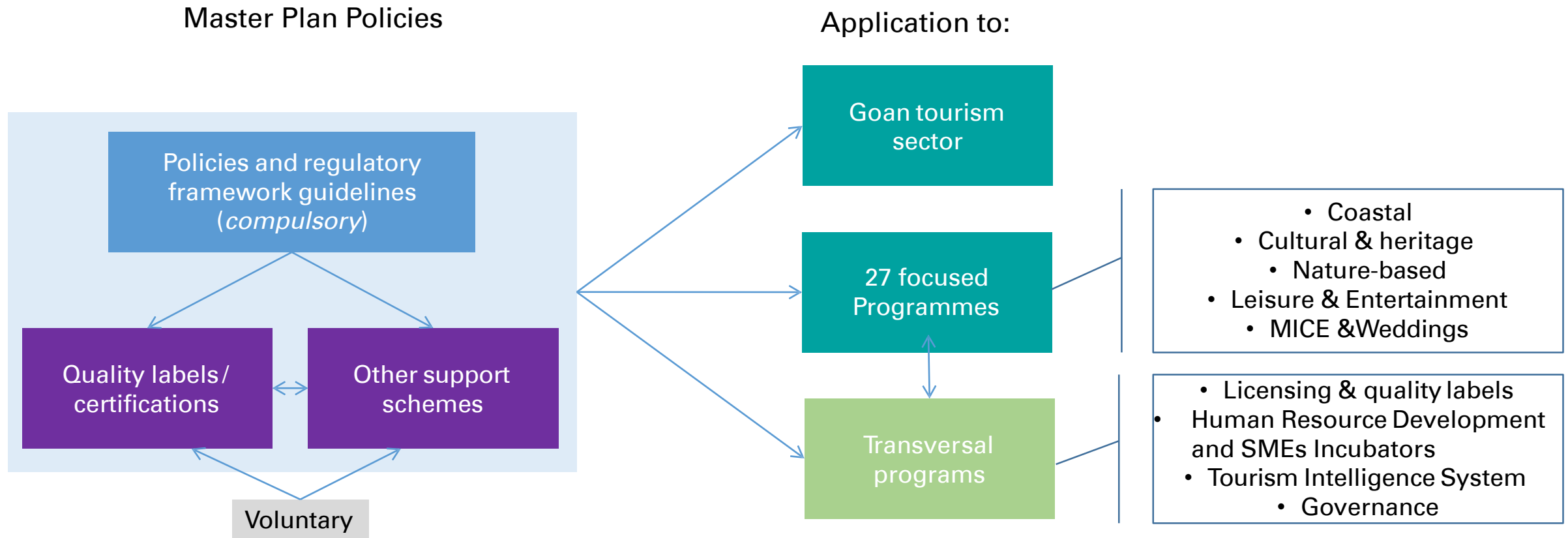
Budget - Proposal - resulting total promotion spending

	Foreign Arrivals	Domestic Arrivals	Total	Foreign Marketing Budget*	Domestic Marketing Budget*	General Marketing	Total (M Rp)	Spending per int. visitor	Spending per dom. visitor
Current	541,480 (10%)	4,756,422 (90%)	5,297,902	17 (34%)	24.91 (61%)	2.05 (5%)	50	0.5 US\$	0.08 US\$
2017 proposal	541,480 (10%)	4,756,422 (90%)	5,297,902	34 (17%)	159 (78%)	10 (5%)	203	1 \$	0.5 \$
2021 projection	958,711 (14%)	5,944,498 (86%)	6,903,209	513 (68%)	199 (27%)	38 (5%)	750	8 \$	0.5 \$
2026 projection	1,458,327 (17%)	7,148,444 (83%)	8,606,771	586 (68%)	239 (27%)	43 (5%)	868	6 \$	0.5 \$
2031 projection	2,146,147 (20%)	8,584,588 (80%)	10,730,735	719 (68%)	287 (27%)	53 (5%)	1,059	5 \$	0.5 \$

5.

Tourism policies and institutional framework

Determination of policies & support schemes needed to implement the Master Plan





Policies & support schemes for MP programs

Master Plan Programs	Policies	Support schemes
Regeneration/ Up gradation of beaches	<ul style="list-style-type: none"> • Infrastructure development and enhancement policies for beaches: access, parking, urban design and equipment; beach promenade and access ; beach facilities • Shacks location and relicensing. Special standards for beachfront shacks 	<ul style="list-style-type: none"> • Blue flag standards and label (or similar) • Shacks' quality label – specialization label (Goan food) • Beach management contracts: for access, parking , services, maintenance, cleanliness and security
Eco Beach resort	<ul style="list-style-type: none"> • Designation / confirmation of protected areas and special development areas for tourism use • Determination of potential tourism uses and density levels • Similar but more stringent policy as for upgradation of beaches program 	<ul style="list-style-type: none"> • Sustainability standards vis a vis use of beaches and tourism development • Blue Flag standards for beaches and sustainability certification for whole eco-beach development
Fishermen Market and F&B Court	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • Fishermen Market & Food Court standards • Goan Culinary label

Policies and support schemes for MP programs

Coastal



Master Plan Programs	Policies	Support schemes
<p>High-end music venue paired with luxury lifestyle resort</p> <p>High-end lifestyle beach club paired with luxury lifestyle resort</p>	<ul style="list-style-type: none">• None	<ul style="list-style-type: none">• Minimum development guidelines• Investment promotion and facilitation scheme to attract top international/national investors and brands
<p>Marinas</p>	<ul style="list-style-type: none">• Designation and definition of Marinas, as tourism attractions.	<ul style="list-style-type: none">• Sustainability standards vis a vis location and development guidelines

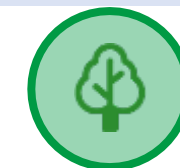
Policies and support schemes for MP programs



Master Plan Programs	Policies	Support schemes
Fort & monuments	<ul style="list-style-type: none"> • None specific beside cultural heritage laws and regulations 	<ul style="list-style-type: none"> • Minimum and complementary standards for facilities and services to be provided for tourism use • Information technology tools for visit facilitation: wifi connection, self guiding mobile app (in addition to potential guided visits by professional)
Villages and Old Goan Houses	<ul style="list-style-type: none"> • Designation and definition of Tourism Villages in tourism act, as tourism attractions. 	<ul style="list-style-type: none"> • Minimum standards to apply for “Tourism Village” designation • Special labels for some facilities within the designated Tourism Villages, such as Old Goan Houses, Handicraft or Goan Cuisine
Culinary	<ul style="list-style-type: none"> • Designation and definition of “Culinary Tourism” as part of tourism attraction. 	<ul style="list-style-type: none"> • Determination of Goan food & drink products, as well as dishes • Certification scheme / label for products, dishes and F&B outlets
Goa multimedia Experience	<ul style="list-style-type: none"> • None 	<ul style="list-style-type: none"> • Identify and assign location and building, preferably in Panaji

Policies and support schemes for MP programs

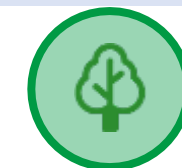
Nature-based



Master Plan Programs	Policies	Support schemes
Nature Clusters	<ul style="list-style-type: none"> Designation and definition of “Nature Clusters” in tourism act, as tourism attractions. 	<ul style="list-style-type: none"> Ensure and develop minimum public infrastructure in the main attractions’ facilities forming part of the Nature Cluster: sign posting for circuit; road access, parking, toilets, permanent electricity, power, water, sewage and mobile and wifi connections Minimum and complementary standards for facilities and services to be provided for tourism use, etc.
Nature Sanctuaries	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Develop or improve public facilities in main entrance point: sign posting and road access, parking, information center, toilets, permanent electricity, power, water, sewage and mobile and wifi connection
Discovery River Cruises	<ul style="list-style-type: none"> Determination of suitable rivers and circuits Designation and definition of “Discovery River Cruises” as part of tourism attraction 	<ul style="list-style-type: none"> Provide small ports/jetties for boats in strategic locations along the river circuits to facilitate access to and discovery of hinterland Provide certification label for boats / companies dedicated to this product, based on minimum standards related to the boat characteristics and serviced provided

Policies and support schemes for MP programs

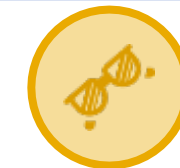
**Nature-
based**



Master Plan Programs	Policies	Support schemes
Adventure & sports tourism	<ul style="list-style-type: none"> Designation and definition in Tourism Act of which activities form part of the "Adventure & Sports" Tourism category 	<ul style="list-style-type: none"> Minimum standards for facilities and services to be provided for these activities in general and specific requirements for each activity type Certification schemes for companies Training certification scheme for specialized guides / trainers
Agro tourism (spice farms and homestays and walks in agro farms)	<ul style="list-style-type: none"> Designation and definition in Tourism Act of "Agro-tourism farms" and Agro-tourism Stays" 	<ul style="list-style-type: none"> Certification scheme and quality label for companies belonging to each type of agro-tourism - specialized label or spice farms.
Wellness destination center	<ul style="list-style-type: none"> Designation and definition in Tourism Act of "Slow Movement" Wellness and what is a "Wellness Destination Center" 	<ul style="list-style-type: none"> Certification scheme and quality label for companies – defining standards that clearly differentiate a Destination Center" from the provision of wellness services only.

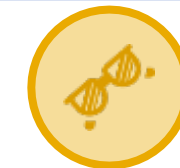
Policies and support schemes for MP programs

Leisure & Entertainment



Master Plan Programs	Policies	Support schemes
Family Entertainment District	<ul style="list-style-type: none"> Designation and definition of “Large Mixed use entertainment District” in tourism act, as tourism attraction. 	<ul style="list-style-type: none"> Minimum development guidelines Investment promotion and facilitation scheme to attract top international/national investors and brands
Golf courses	<ul style="list-style-type: none"> Designation and definition of “Eco-friendly Golf Course Development” tourism act, as tourism facility. Give priority to development in the hinterland or, at least, not on the coast 	<ul style="list-style-type: none"> Define development and golf course management guidelines with special emphasis on environmental sustainability
Waterfront promenade	<ul style="list-style-type: none"> Align policy with Taluka and local municipality policies 	<ul style="list-style-type: none"> Provide guidelines to ensure tourism attractiveness of promenades to cater for both residents and tourists (especially domestic)

Policies and support schemes for MP programs



Master Plan Programs	Policies	Support schemes
<ul style="list-style-type: none">• Gaming cluster	<ul style="list-style-type: none">• Relocation of offshore and nearby onshore gaming in more appropriate location, taking the opportunity to create an international standards gaming cluster	<ul style="list-style-type: none">• Identification and allocation of adequate area• Provide guidelines for the development of a state-of-the art gaming cluster, either offshore (with some services onshore); or onshore; or mixed (offshore and onshore)

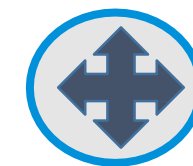
Policies and support schemes for MP programs

MICE & Weddings



Master Plan Programs	Policies	Support schemes
Mass events	<ul style="list-style-type: none"> • Provide support to mass events that are sustaining and showcasing Goas' new tourism positioning strategy, especially during the low and mid season 	<ul style="list-style-type: none"> • Identify existing mass events that meet this criteria • Support the creation of new events meeting this criteria and that would take place during the low and mid season • Provide guidelines for these events and facilitation services for their celebration (authorities' approval, support public services, location)
Convention Centre	<ul style="list-style-type: none"> • Support the offer of large MICE events in the State of Goa by providing a state-of-the-art facility and the set up of Convention Bureau 	<ul style="list-style-type: none"> • Public sector to be the main investors in this large facility • Establishment of a Convention Bureau in partnership with the private sector, in order to promote and manage events in this facility and collaborate with the whole tourism sector as providers • Create special club/cluster
Weddings & Incentive trips	<ul style="list-style-type: none"> • Align policy with Taluka and local municipality policies 	<ul style="list-style-type: none"> • Establish minimum quality standards for establishments to qualify for membership • Promotion support scheme within products/ cluster marketing

Policies & support schemes for TRANSVERSAL programs



Master Plan Programs	Policies	Support schemes
Licensing / relicensing of specific sectors of activities and quality labels	<ul style="list-style-type: none"> • Minimum compulsory standards need to be applied to some key activities in Goa: sports & adventure tourism; tourism guides, taxis • Voluntary application to quality labels to recognize businesses / attractions offering international standards 	<ul style="list-style-type: none"> • Grace period for existing companies • Soft loans or similar schemes for re-investment to upgrade / adapt buildings/ facilities/ services to new standards • Awareness and training programs
Reclassification and special labels for tourism accommodation	<ul style="list-style-type: none"> • Reclassification of tourism accommodation: changing A to D model to star-rating system (international standards) • Voluntary application to special labels to recognize specialization of some properties 	<ul style="list-style-type: none"> • Grace period for existing companies • Soft loans or similar schemes for re-investment to upgrade / adapt buildings/ facilities/ services to new standards • Awareness and training programs
Tourism Intelligence System (TIS)	<ul style="list-style-type: none"> • Regulations to establish a comprehensive tourism statistics and Tourism Satellite Account System, able to measure tourism performance in a holistic, efficient and reliable way. 	<ul style="list-style-type: none"> • Creation of TIS dedicated section within one existing • Awareness campaign among tourism enterprises for providing continuous and reliable data

Scope of Work / Status

Planning Phase (Phase I) Modules	Update
Module 1: Current and projected tourism scenario in Goa and understanding key gaps	Submitted and approved
Module 2: Tourism concepts to attract tourists to Goa	Submitted and approved
Module 3: Development of Master Plan	Interim Submission for Mod. 3 submitted and approved Final report submitted for discussion
Module 4: Development of Tourism Policy	To be submitted
Module 5: Review and recommendations on strengthening institutional and economic linkages	
Module 6: Action plan	



Thank you

This draft report was submitted solely for discussion purposes with the Govt./ Committee constituted vide Order no. 7/5/WC-TMP/2014-DT/1745

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