

# Goa Tourism Master Plan :

## Module 6

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Submitted to the  
Department of Tourism

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June 2021





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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 6: "Development of Action Plan for implementation of previous mod" 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 (or part thereof) is a draft version and may be revised, updated or reworked. This report should be understood as the final report only after suggested changes, if any, 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.
9. The report may contain KPMG's analysis of secondary sources of published information and incorporates the inputs gathered through meetings with industry sources. Where, for reasons of confidentiality, the industry sources cannot be quoted in this document, these are not attributed to the industry source. While information obtained from the public domain has not been verified for authenticity, we have obtained information, as far as possible, from sources generally considered to be reliable.
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.
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# Recap



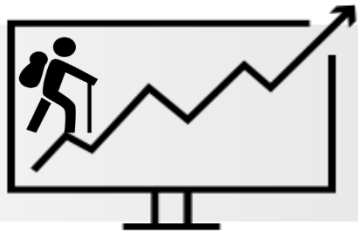
**Phase-1: Preparation of Master Plan & Policy**

**Phase-2: Implementation of Master Plan & Policy**

Phase-1 is divided into six modules.

Module 1-4 approved. Modules 6 presented now.

## Module-1



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

- Submitted on 17/07/2015
- Approved on 16/12/2015

## Module-2



**Tourism concepts to attract tourists to Goa**

- Submitted on 10/02/2016
- Approved on 10/06/2016

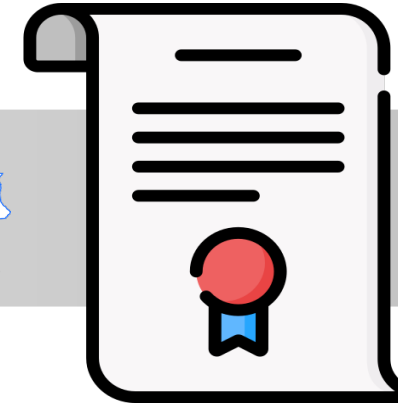
## Module-3



**Development of Tourism Master Plan for Goa**

- Submitted on 25/11/2016
- Approved on 29/12/2016

## Module-4



**Development of Tourism Policy for Goa**

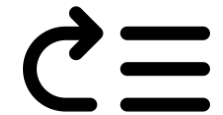
- Submitted on 19/01/2017
- Approved on 20/07/2020

## Module-5



**Recommend measures for strengthening institutional & economic linkages**

## Module-6



**Prioritization of tourism programs, new initiatives, tourism hotspots, safety & grievance Redressal**



# Aspects Covered : Module 6



## Prioritization of Programs

- Prioritization of various programs as enlisted in Module-3
- Sub-concepts within each program for development in short to medium term
- Tourism Performance Index



## Responsible Tourism Initiatives

- Introduction of Eco-labels
- Hinterland Tourism : Village development & Nature / Trekking trails
- Introduction of Tourism Development Cess



## Carrying Capacity and Tourism Hotspots

- Carrying capacity based on the available infrastructure.
- Identification and management of Tourism hotspots



## Safety & Grievance Redressal

- Safety & surveillance on beaches
- Introduction of Tourism hotline & Tourism police
- Introduction of Night clubs and Shacks Policy
- Technology interventions for Garbage disposal, tourism statistics collection and beach cleaning



## Module-6

# Proposed Development Areas for Goa Tourism





# Overview : Development areas for Goa Tourism



**16/04/2021** ➡ **Suggestions made by the Evaluation Committee**



**Wellness / Medical**



**Cultural Festivals & local events**



**Upskilling Tourism industry**



**Music/Art festivals**



**Family Destination**



**Developing Goan inland waters**



**Film City / Entertainment City**



**Adventure Tourism**

The products / programs suggested by the Evaluation Committee are detailed out in Module 3 of GTMP

**18/06/2021** ➡ **All suggestions discussed & in-principally approved in the Evaluation Committee**

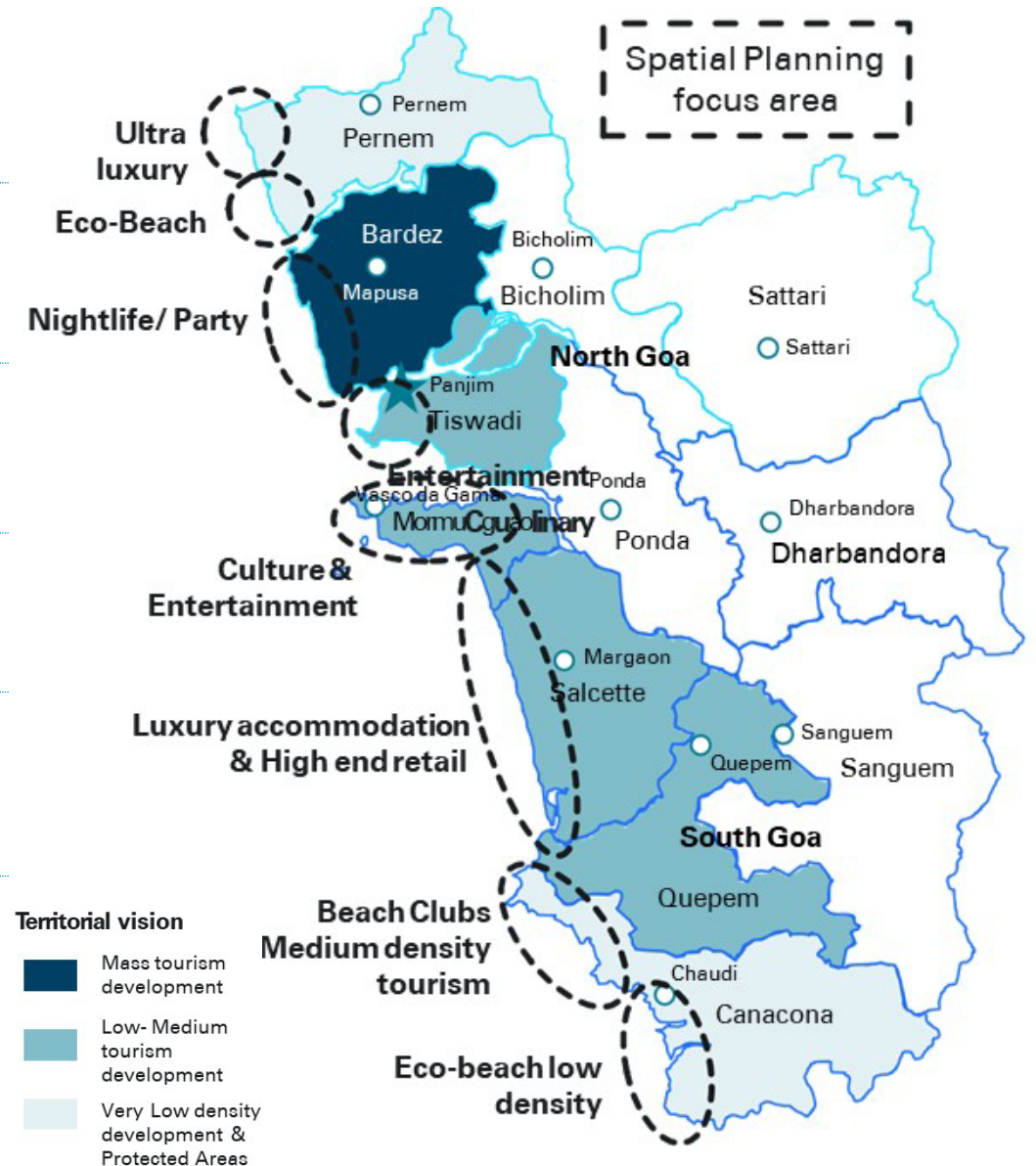


# Coastal Tourism programs as per Tourism Master Plan



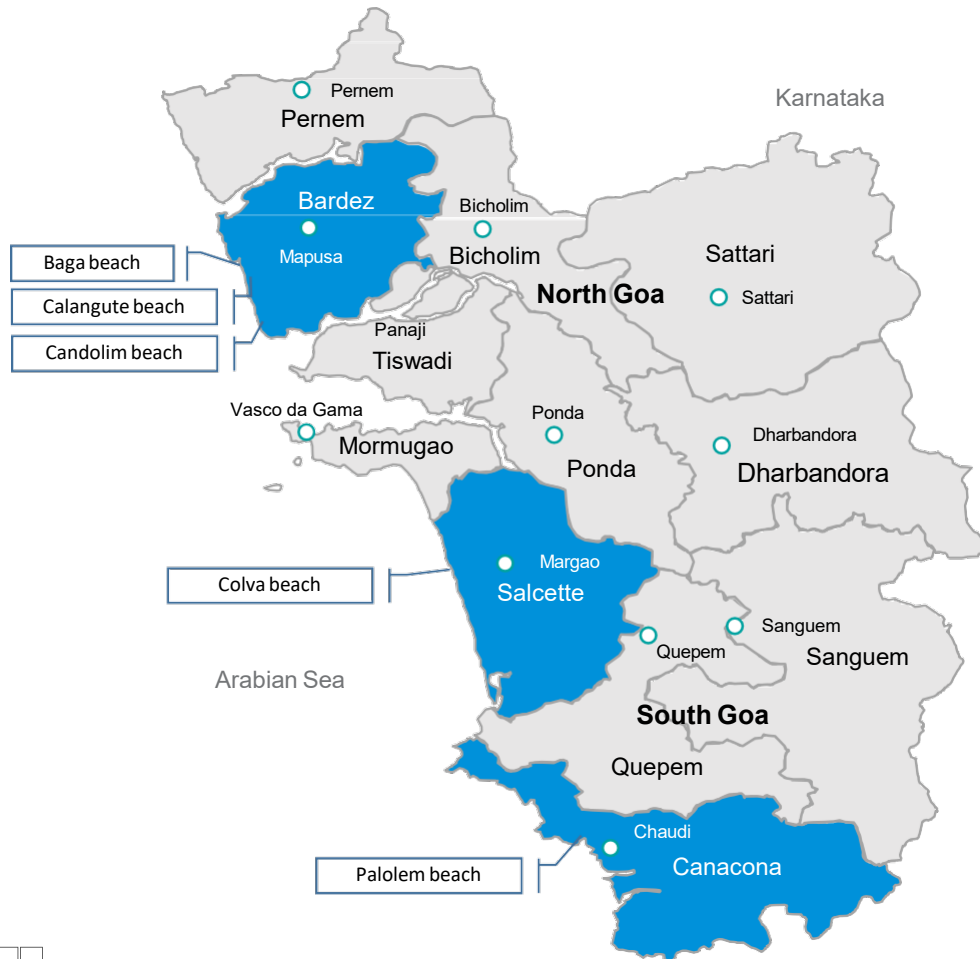
- 1 **Regeneration/ Up gradation of Beaches** ★ ⚡  
Across Goan beaches. Pilot Projects –S. Goa: Colva, Palolem  
N. Goa: Calangute, Candolim, Baga, Arambol.
- 2 **Fishermen Market and F&B Court** ★ ⚡  
Brittona, Chapora Bay, Siridao and Mobor
- 3 **High-end music venue paired with luxury lifestyle resort**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

★ **Flagship programs** ⚡ **Quick Wins**





# Regeneration/ Up gradation of Beaches



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"> <li>• <b>Improve access:</b> restrain volume of vehicles with direct beach access; improve urban landscape to access the area; reorganize retail where invading roads and sidewalks.</li> <li>• <b>Improve parking:</b> 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.</li> <li>• <b>Improve urban sidewalks</b> within the main areas: pedestrian walkways clearly separated from car and motorcycle traffic; create biking routes.</li> <li>• <b>Improve shacks:</b> Taking into consideration recommendations of <b>GCZMA study and NGT approval</b>. Give quality labels to best shacks and special Goan cuisine label for those who would like to apply and meet standards.</li> <li>• <b>Improve the beach itself:</b> public showers; watching towers and rescue team; separate bathing areas from watersport areas; daily beach cleaning; etc.</li> <li>• <b>Improve retail offer:</b> reorganize retail space and create clusters of retail paired to shacks clusters or adjacent. Encourage special labels for Goan handicraft.</li> <li>• 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.</li> </ul>	

# Urbanized beaches



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





# Non-Urbanized natural beaches



Illustrative

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





# Regularization / Upgradation of Shacks





# Regularization / Upgradation of 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





# Themed Beach at Cansaulim – Colva beach stretch



## Proposed Concept

- State of the art amenities & offerings at the selected beach front.
- Technological interventions : Smart parking, Surveillance camera, Wi-Fi, Smart bins, solar energy collection, tourism police etc.
- Designated zones on the beach for activities, accommodation, F&B and ancillary activities
- Cycling, walking & car parking spots
- Designated locker space & shower area
- Beach access to differently abled
- Sand artwork and artisan's village



**Cansaulim – Colva beach stretch**

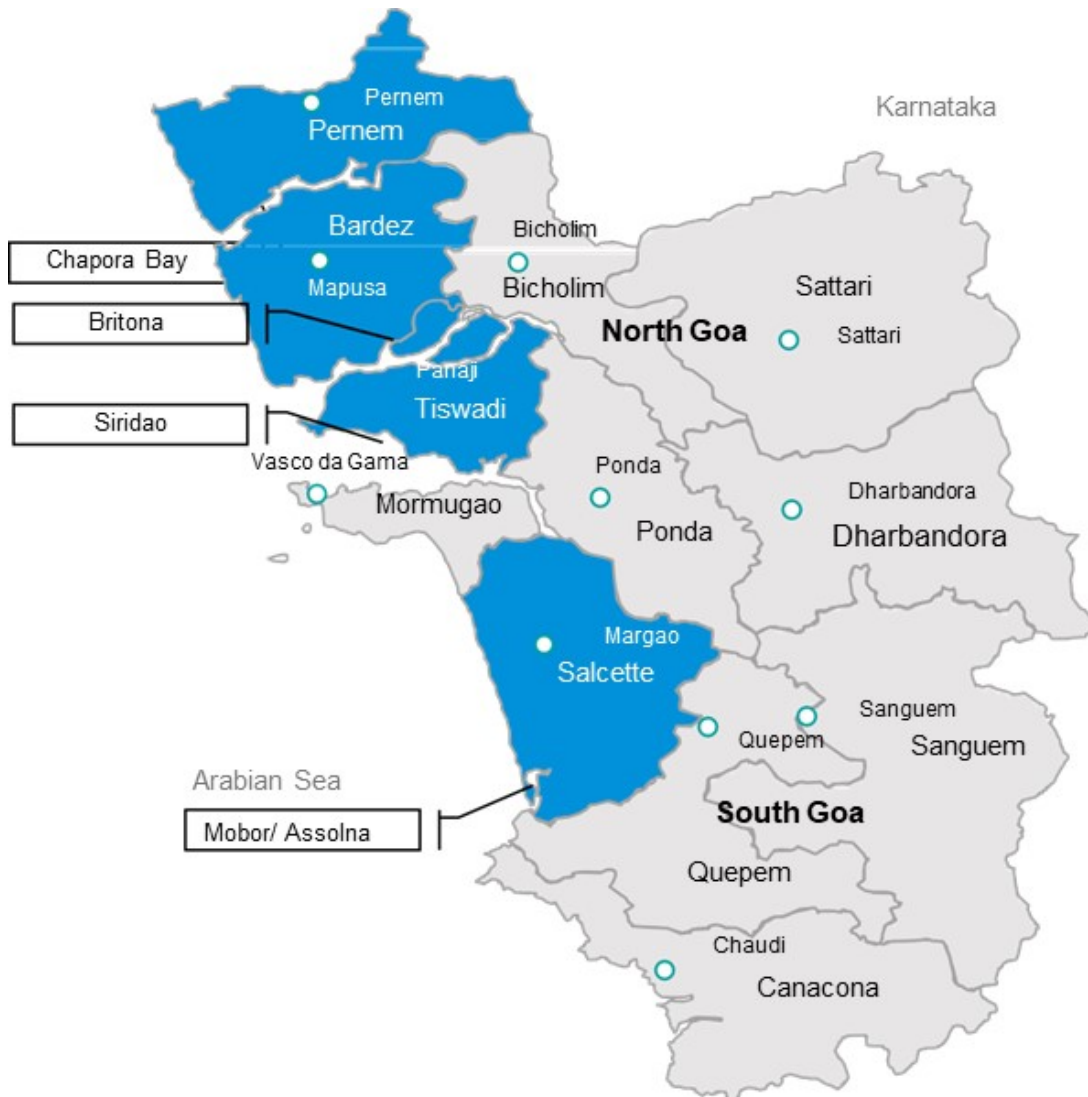
## IMPACT

- ✓ Attract high value tourists
- ✓ Replication of the model





# Fishermen market and F&B court



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



# High-end music venue with luxury lifestyle resort



Concept and objectives	<ul style="list-style-type: none"><li>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.</li></ul>
	<ul style="list-style-type: none"><li>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.</li></ul>

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

Description and tasks
<ul style="list-style-type: none"><li>Identify potential high end operators – preferably international brands – for this development</li><li>Identify potential investors for this project</li><li>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.).</li><li>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</li><li>Public sector to facilitate the whole process</li></ul>



# Luxury Eco resorts



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"><li>• 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.</li><li>• Still, some beaches should be partially preserved to offer an adapted environment for nature and wildlife (sea turtle nesting, dolphins, marine life, etc.).</li><li>• Accessibility should be improved in terms of upgrading existing roads instead of building new ones.</li><li>• 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.</li><li>• Some developments might include organic gardens to supply their restaurants and tourists could even participate in cooking sessions.</li><li>• Develop Protection and Interpretation Centres and offer learning-by-doing activities (edutainment) with local communities</li><li>• Relaxation and recovery activities such as spa treatments &amp; massages, meditation, yoga</li></ul>







# Oceanarium & Marine Edutainment center



## Proposed Concept

- To develop boundary wall & basic infrastructure for the private investor to develop a state-of-the-art oceanarium.
- To utilize the proposed e-autos to ferry the tourists from parking areas.



**Panaji / Benaolim**

## IMPACT

- ✓ Increased viability for private investor to develop & operate.
- ✓ Generate Employment
- ✓ Develop the area as an edutainment hub



## Proposed Attractions to be developed by Investor

**Aquarium Walk showcasing marine life**

**VR shows**

**Souvenirs / Gift Shop**

**Fish Spa**

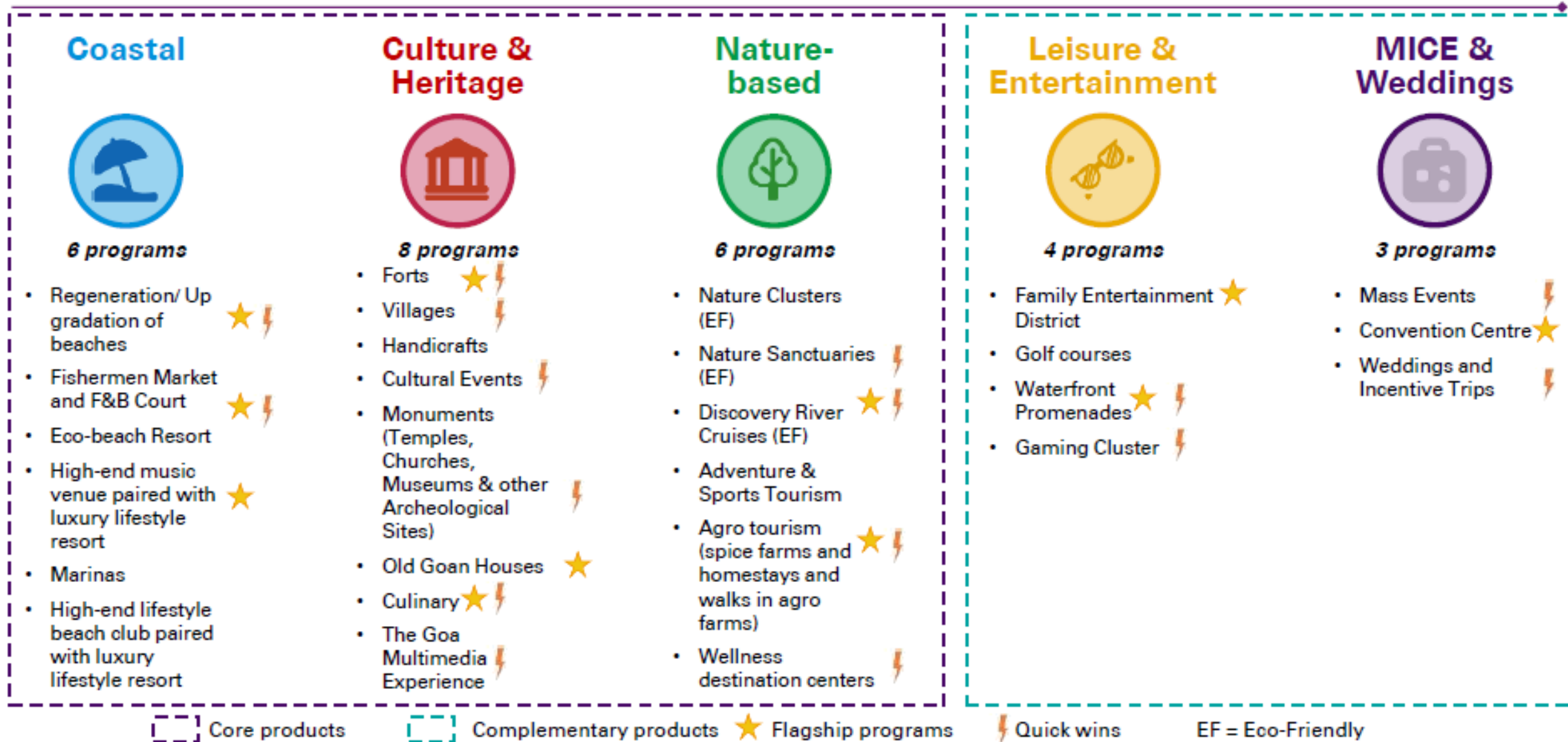
**Photo booth**

**Marine related book shop**

**Aquarium themed fine dining restaurant**



# 27 programs identified in Master Plan Module 3





## Module-6

# Prioritization of Tourism Programs



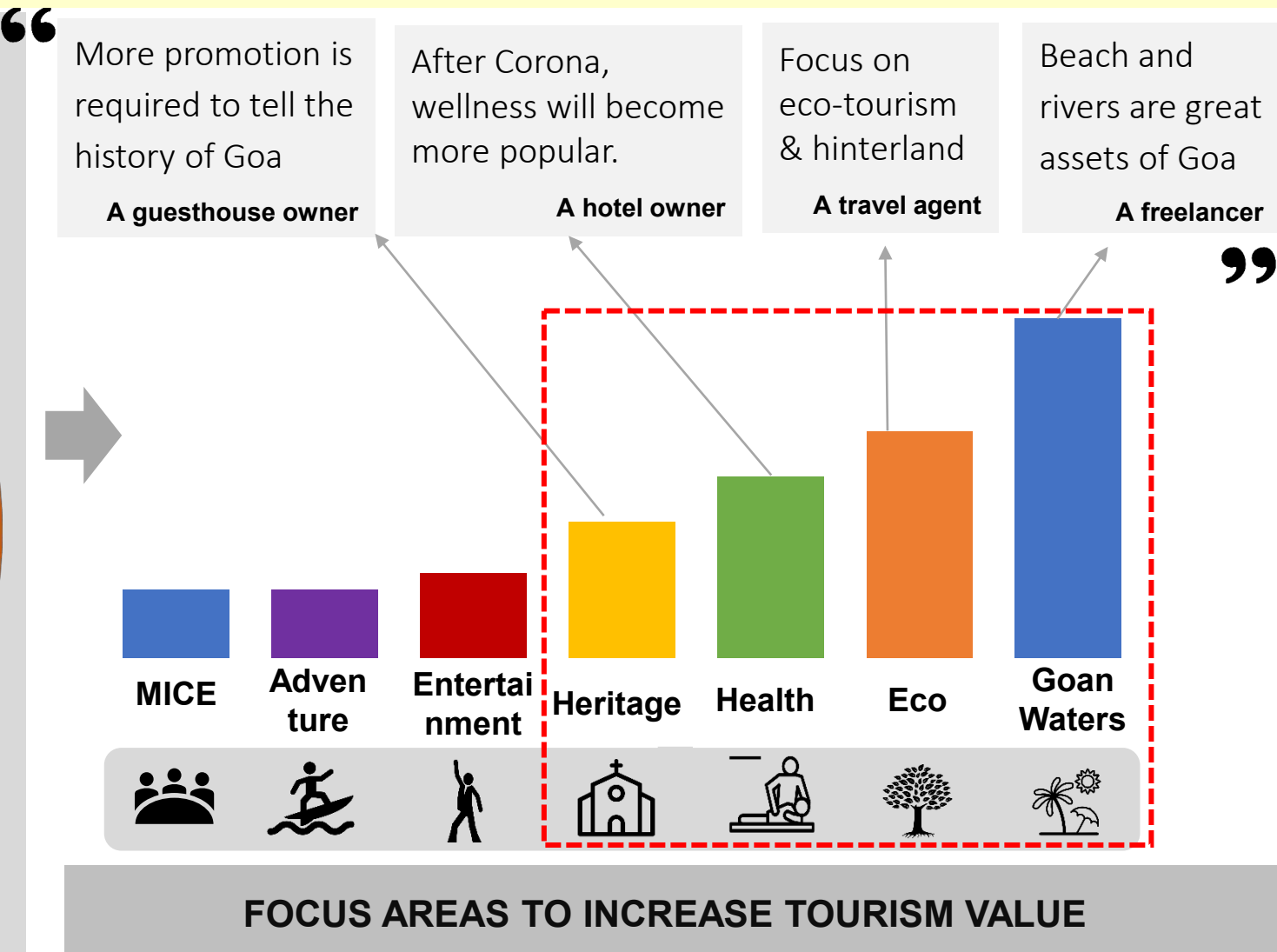


# Tourism Products on Priority



In the next 3-5 years, Goa Tourism should champion four tourism products.

## Products identified as per Module-3





# Culture & Heritage



## Old Goa Circuit



- Pedestrianization, narrative making, interpretation center



## Culinary tourism



- Certified labels to promote authentic Goan food
- Eat streets with “flavors of India” at prominent locations
- Open Cafes to promote Social Distancing



## Game to discover unknown Goa



- “Game of points” to encourage tourists to travel to unexplored sites of Goa
- Sites to have QR code to be scanned through a fun app to gain points
- Codes to also provide information about the place
- Redeem points with souvenirs while leaving Goa

## AR / VR intervention



- New experience of digitally revived old structures



- Cabo-de Rama, Aguada, Chapora, St Augustine
- To showcase Heritage



# Development of Forts in Goa



## Proposed Concept

- To **restore** the forts & heritage sites of Goa and thereby develop tourism opportunities for its operations & maintenance.
- **Lighting of the monument** to improve the aesthetics but shall also attract ancillary private investments in the tourism sector.

## IMPACT

- Increased tourist footfall
- Decongestion of overcrowded locations
- Local economic development



## Tentative Locations & investment

1

Cabo de Rama Fort



2

Chapora Fort



3

Sankhli Fort



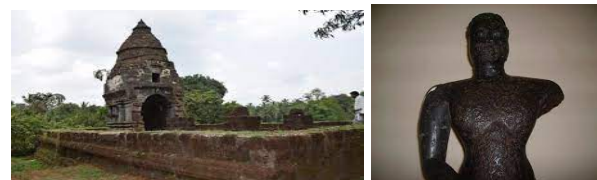
4

Corjuem Fort



5

Kudne Heritage circuit



## Proposed Interventions

1

Restoration & Lighting



2

Toilet Facility



3

Parking Facility





# Digital Museum and holography at Aguada Fort



## OBJECTIVE

- Highlights the sacrifices made by the freedom fighters during Goa liberation movement.
- AR/VR and other technology interventions to enhance the tourist experience.



**Aguada Lower Fort (Central Jail),  
Candolim**

## IMPACT

Digital Museum will complement the major attractions developed in the project site like Sound & Light Show

## Proposed Digital Interventions at Aguada Fort

- **Augmented Reality Slates bringing few elements of history alive.**



- **Digital screen displaying information about the Goan heritage and freedom fighters.**



- **Hologram or 3D projections (as viable) of freedom fighters like Ram Manohar Lohia, TB Cunha etc. in (closed) prison blocks.**





# Development of a Goa Haat & App for online sale of handicraft



## Arena for Indian artisans to showcase regional handicrafts, souvenirs & cuisines

### Project Concept

- Permanent market for artists to showcase handicrafts, souvenirs & local cuisine.
- Ticketed entrance for the visitors and application process for allotment of selling space in the haat to increase versatility in cultures of India.
- GTDC should administer the development & operations of Goa Haat.

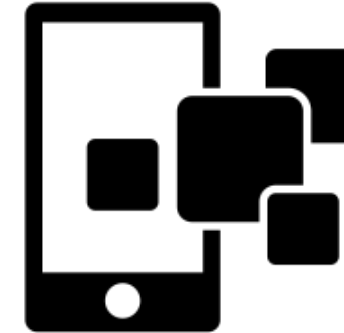


### IMPACT

- ✓ Highlighting Goan heritage & Culture
- ✓ Avenue for artists to showcase & earn livelihood and for tourists to experience various other cultures of India.



## App to provide online platform for sale



- Tribal Crafts
- Needle Work
- Natural fibre products
- Fashion accessories
- Festive Decorations

### Project Concept

- Android & iOS App for
- Registered artisans shall be provided log-in credentials for free
- Other artisans shall be allowed to register post payment of a nominal fee

### IMPACT

- ✓ Increased reach and wider market to cater
- ✓ Promotion of Artists with Goa Haat



# Tourist Facilitation Center at state borders



## Proposed Concept

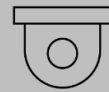
- Facilitation center for tourists arriving by road with basic utilities like parking, toilets, F&B services, Information center, Sale of souvenirs
- Installation of High-resolution cameras to track and record number of tourists entering the state via road.
- Collection of tourist data for analysis



## 5 Major road entry points of Goa

## IMPACT

- ✓ Enhances security of locals & tourists
- ✓ Data collection regarding footfalls & profiling



Cameras & Sensors at all the state entry points to automatically collect inward and outward data



Tracking of number plate of every vehicle entering & exiting the state

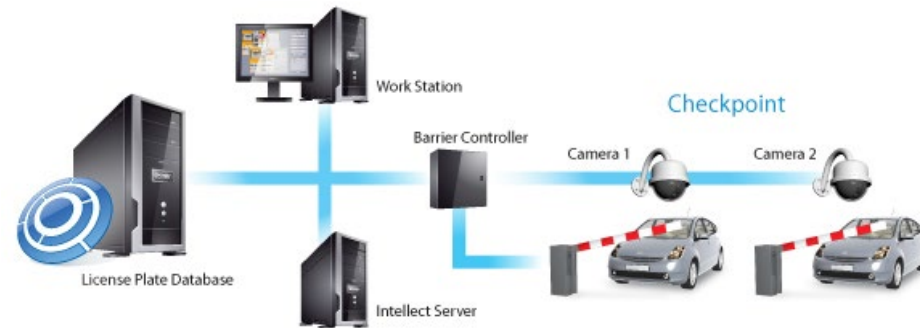


Common software to be developed for all registered accommodations to update tourist data on real time basis as per check-ins



## 5 Major State Entry Points

- Pollem
- Mollem
- Dodamarg
- Dhargalim
- Keri





# Wellness – Promoting quality of life for nomadic workers



## COVID-19 has revolutionized the way we work

- Off-station work is the new norm
- Digital meetings

## It is only confirming a pre-existing trend

- Major companies in the West promoting work from home to boost productivity
- 70% of young managers in the US allow remote work

## A wide range of professionals are already eligible for nomadic work

*Designers, content writers, consultants, analysts, data entry, online tutors, translators, web developers, etc.*



Selina Hotels, a chain specialized in “nomad offices”

Clay, a working space in Anjuna

## Promote “working holidays” in Goa’s marketing strategy



## Target **young Indian professionals** with all-inclusive packages

- **Well-equipped co-working spaces**, offering IT facilities and opportunities to network (already exist)
- **Affordable accommodations** from 1 week to 1 month, giving a sense of home
- **Strategic location**: outside large settlements yet close to amenities required to work



# Wellness - Promoting Wellness tourism



## Ayurveda is at a cross-road of strategic tourism segments for Goa



The potential of these segments is going to increase massively in the post-COVID-19



### Goa has a strong Ayurveda tourism potential:

- Ideal climate
- Rich availability of plants
- Tradition of resorts
- Reputation of Yoga hub among affluent tourists

## Introduce an Ayurveda Quality Label



Guarantee basic safety and health standards

Help tourists to make informed choice;

Help to increase awareness about Ayurveda tourism in Goa

**Concept to be later scaled up to other AYUSH treatments**



# Ecotourism & Nature education park for Western Ghats



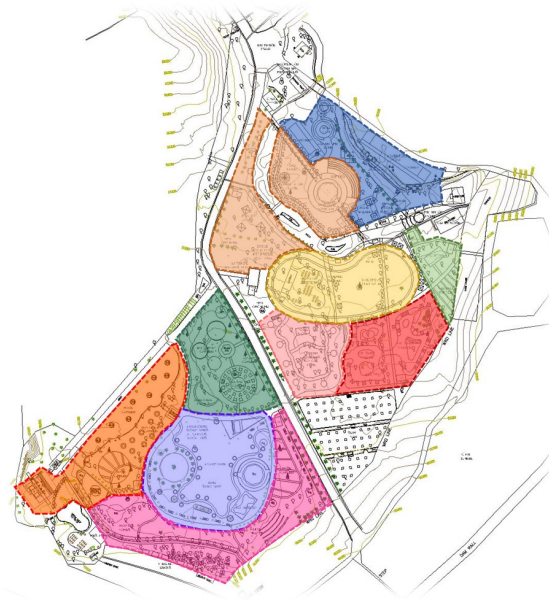
## Land Details

**Land Area: 42 Acres (1,69,968 sq.m.)**  
**Land with GFDC: 47000 sq.m.at**  
**Salaulim**

## Proposed Concept

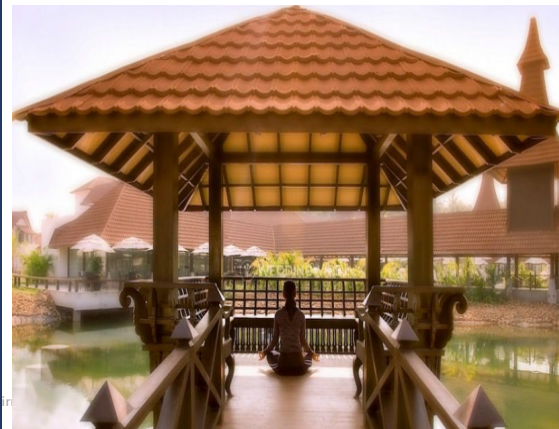
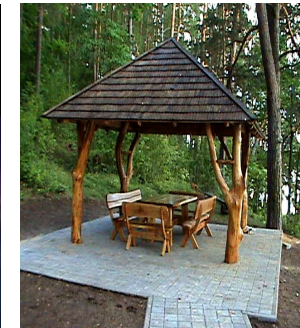
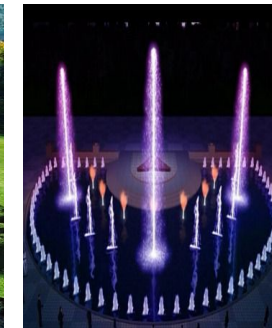
### Edutainment Eco-Park

- Nature Interpretation Centre
- Eco park & edutainment center for western ghats
- Solar Lighting
- Basic Infrastructure & pathway
- Wooden cottages / AC glamping tents for accommodations
- Yoga & mediation block
- Amphitheatre & Landscaping
- Buggy track for easy access



### IMPACT

- ✓ Increased viability for private investor to develop & operate.
- ✓ Generate Employment
- ✓ Wellness destination hub
- ✓ Hinterland tourism
- ✓ Decongestion of tourism locations with high footfall





# Eco-tourism : Village Development



## Development of Village Tourism + Model Villages

### Promotion of Homestays

- ❖ Interested households can register with DOT for offering homestays to tourists.
- ❖ Registration valid for 2 years
- ❖ Homestay classification into “Silver” or “Gold” based on MOT guidelines.

### Experiential Tours

- ❖ Showcase the rural life, art, culture, heritage and any other unique attractions in the village.
- ❖ Duration of tours can range between few hours to overnight stays.
- ❖ Programs curated by private operators.

### Tourist Guide Trainings

- ❖ Training to Goan youth on Tourist Facilitator Program.
- ❖ Advanced programs may include soft skills and etiquettes trainings.
- ❖ Foreign language courses for interested candidates.

### Developing Model Villages

- ❖ Theme based development of village like Agro / Heritage / Crafts / Backwaters etc.
- ❖ Village Panchayat / local acceptance mandatory.
- ❖ Basic amenities provided by the State.





# Eco-tourism: Green Weddings



## Why eco-weddings for Goa?

- (i) Curb the environmental impact of weddings
- (ii) Growing demand for eco-friendly lifestyle among foreigners and urban Indians
- (iii) Portrait Goa as a front-runner in terms of responsible tourism



## What is an eco-wedding?

**Zero-waste:** no plastic, reusable cutlery, use of compost stations, etc...

**Organic food** with local products only

**Animal friendly:** option for vegan food, support to local animals, etc.

**Use of local service providers and suppliers** to benefit the local economy

**Eco-friendly** invitation cards

Lesser investments but more logistics

**Significant added-value**



**Provide eco-labels to wedding planners for eco-weddings**



# Eco-tourism : Trekking Corridors

## The example of Costa Rica

From the highest deforestation rate in the world to high range eco-tourism



## Infrastructure plan

The challenge of trekking trails is not building the trail itself, it is the infrastructure on the way



## Revaluation of abandoned lands

Identify de-valued forest plots to re-value land (new plantations etc.) and build sustainable camps



Choose Canacona as pilot eco-Taluka

Link the beach to national parks

Trails through coast, hinterland and hills

Goan Western Ghats: an overlooked natural jewel

Create trekking corridors along with creation of wayside amenities



# Eco-tourism : Trekking Corridors & Camping areas



## Proposed Concept

To develop trekking corridor / path and the following supporting infra:

- Camping areas
- Toilet blocks
- Car Parking facility
- Informative boards & viewpoints / sitting area
- Emergency phone-booths

## IMPACT

- Attract responsible tourists
- Experiential & adventure tourism



## Proposed trails & Camping area



Dudhsagar Waterfall jungle Trek



Satrem & Surla Waterfall Trek



Netravali Wildlife Sanctuary Trek



Cotigao Wildlife Sanctuary Trek



Survey the route and plan locations

Plan ancillary developments along the way

Develop designated camping spots

Ticketed entry & rental equipments



# Leveraging the potential of Goan Waters



## Natural Assets of Goa



**11 Rivers**



**35 beaches**



**12 Lakes**

Goan backwaters are less explored and have high potential for minimalist tourism

**A tour Operator**

## Proposed Goan waters tourism products

### Inland River Transportation

- ❖ Waterways should be explored for tourist transportation services
- ❖ Development of Jetty / floating pontoons at strategic locations
- ❖ Creation of central hubs along with tourism activities



### Edutainment Nautical tours

- ❖ Education trips to backwaters
- ❖ Responsible approach towards nature
- ❖ Skill building of guides
- ❖ Kayaking, bird watching tours, fauna & flora etc.



### Glamping at beaches

- ❖ High value “**minimalist tourism**”
- ❖ Temporary structures with low environmental impact
- ❖ Low bed density coastal talukas such Pernem & Canacona to be targeted





# Development of jetties for inland waterways



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

Description and tasks
<ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> <li>• The mixed-use development that forms part of the Marina will include: retail, tourism and residential accommodation units, leisure &amp; entertainment offering.</li> <li>• Additionally, the development will need to include large open spaces for public use to allow the flow and concentration of significant numbers of people.</li> <li>• 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.</li> <li>• Parking areas must be created in the vicinity and the footpaths network providing access from these to the marina must be improved.</li> </ul>



# Development of jetties for inland waterways



## Jetty Development

### Proposed Concept

- ❖ Waterways should be explored for tourist transportation services
- ❖ Development of Jetty / floating pontoons at strategic locations
- ❖ Creation of central hubs along with tourism activities
- ❖ Developed jetties to open new avenues for tourism activities

## IMPACT

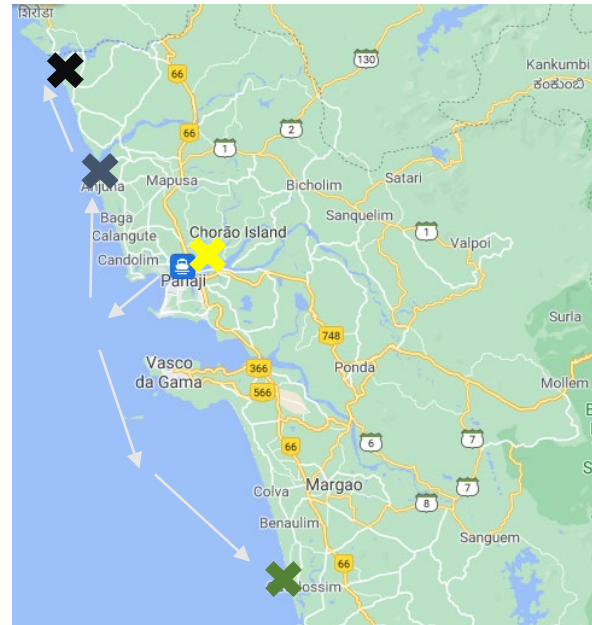
- ✓ Creation of infrastructure for introduction of inland waterways
- ✓ Better connectivity for tourists
- ✓ Encourage other themed cruises



- ❑ Brittonna – Chapora – Tiracol
- ❑ Brittonna– Cavelossim

### Proposed jetties to be developed

- ✕ **Chapora Jetty**
- ✕ **Cavelossim Jetty**
- ✕ **Brittonna Jetty**
- ✕ **Tiracol Jetty**



## Natural Assets of Goa



**11 Rivers**



**35 beaches**

## Inland waterways

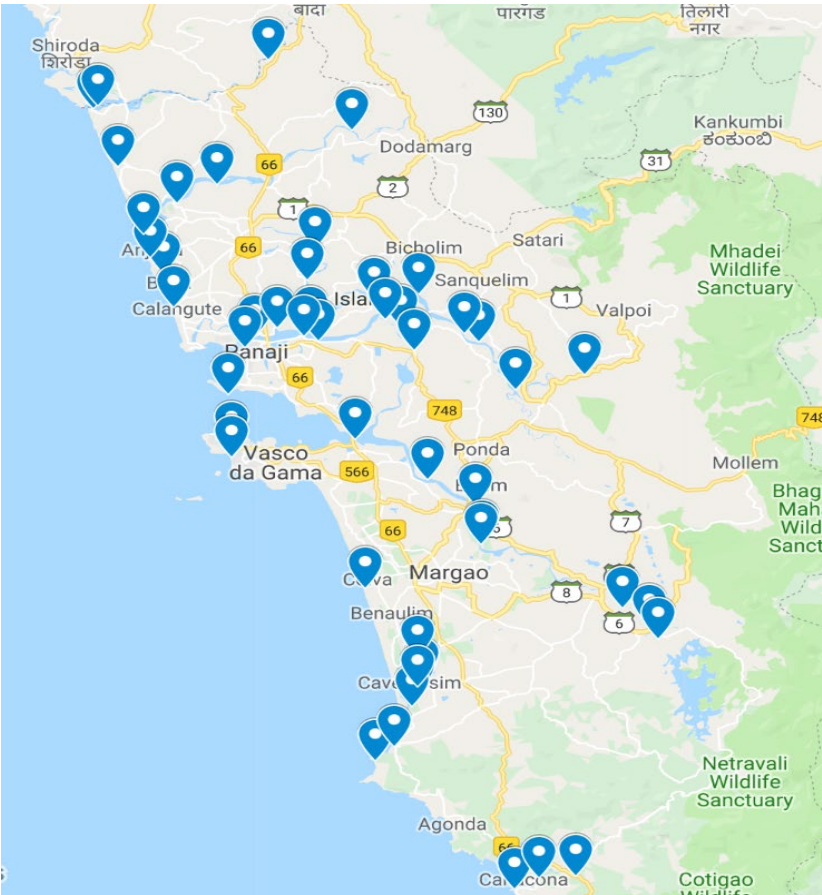




# Development of jetties for Water Taxis



## Inland River Transportation



Potential Locations for Developing Transport Hubs, tourist Jetties and terminal buildings



- ❖ Waterways should be explored for tourist transportation services.
- ❖ Development of Jetty / floating pontoons at strategic locations.
- ❖ Creation of central hubs along with tourism activities.
- ❖ Ferry Services connecting major tourist hotspots in Goa.

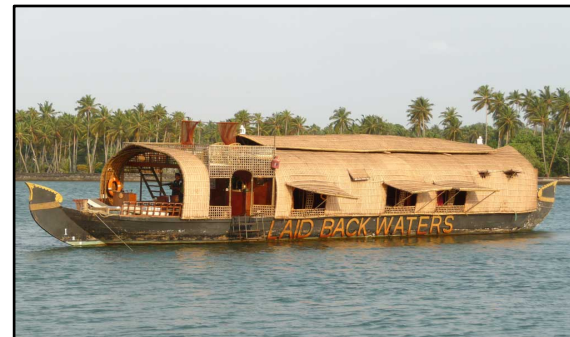
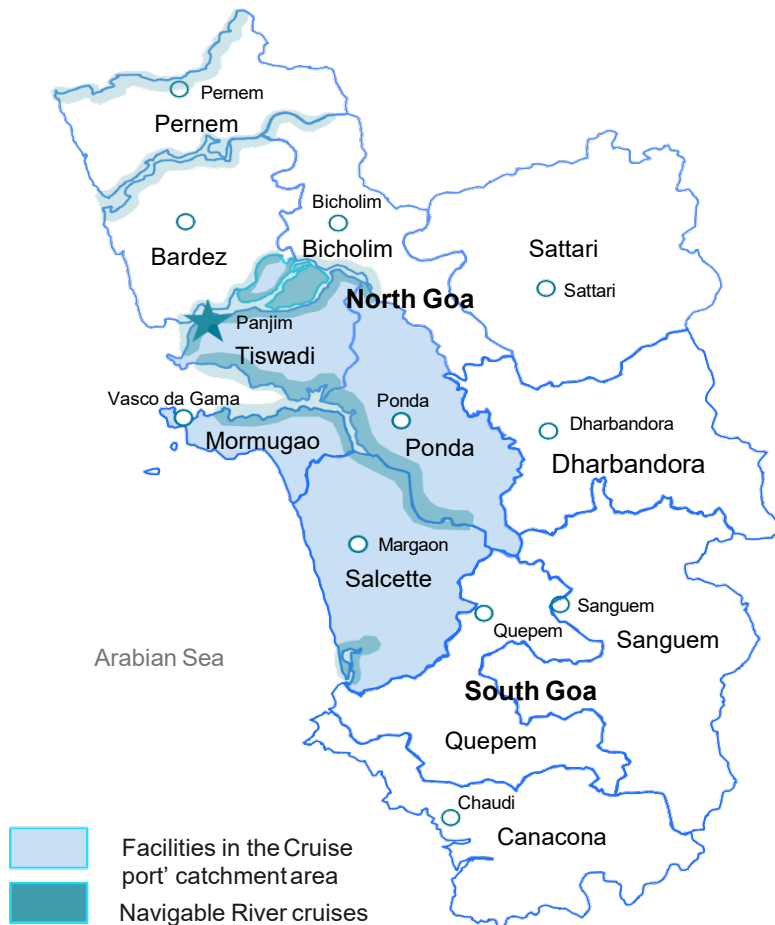
### Declared National Waterways in Goa

Name	River	Length (kms)
NW25	Chapora	33
NW27	Cumbarjua	17
NW68	Mandovi	41
NW71	Mapusa	27
NW88	Sal	14
NW111	Zuari	50



# Development of jetties for River cruises

## River Cruises



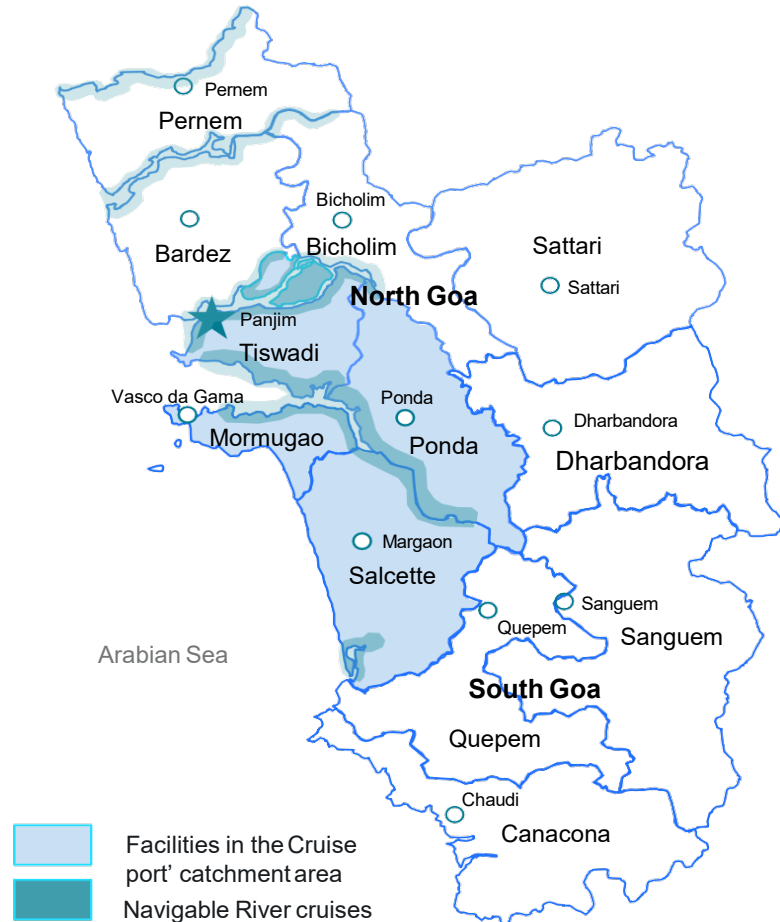
- ❖ Dinner cruises and backwater cruises are **currently in operation** through some of the main navigable rivers in Goa.
- ❖ The experience could be upgraded by creating an extensive network of ports / marinas, improving environmental management.
- ❖ Riverboat cruises should:
  - Showcase landscapes and natural environments of the Goan hinterland.
  - Various modalities including the creation of halting points along the river with attractions, activities and access for the discovery of Goa's hinterland should be considered.
  - Have a **high emphasis on safety and standards.**



# Development of jetties for Edutainment cruises



## Edutainment Nautical Tours



- ❖ Education trips to backwaters.
- ❖ Responsible approach towards nature
- ❖ Skill building of guides.
- ❖ Kayaking, bird watching tours, fauna & flora etc.





# Development of Riverfronts



## River Water Fronts



Santa Monica Jetty, Panjim



Proposed Development of Santa Monica Jetty Terminal



Chapora Jetty



Chapora River Front

❖ Potential for development of a lively waterfront with live entertainment, music, restaurants and retail.

✓ A waterfront along River Chapora & River Sal could also be considered for development given that it can be accessed from the port via sea.

✓ A waterfront could be explored at Panaji along the River Mandovi to give an opportunity to visitors to discover the capital city of Goa and have an insight into the destination

❖ Potential for Construction of 2 large transport hubs, 19 small transport hubs and 35 river jetties at 11 talukas in the State.



# Entertainment City



## OBJECTIVE

- Development of basic infrastructure for film industry to develop and operate.
- A plug & play arena to organize music festivals & concerts
- Supporting Infrastructure like Helipad, parking, toilets, F&B area, landscaping etc.
- Due to space constrain, more focus towards animation / CGI production, and postproduction studios



*CGI animation studio*



*Broadband infrastructure*



*Toilets*



*Animation studio*



*Helipad*



*Parking Area*



*Landscaping*



*Accommodation Units*



*Plug & play arena*



**Mandrem, Pernem**

## IMPACT

Enhancement of  
local film  
production

Increased  
revenues for  
the Government

Creation of  
employment

Boost to the  
Tourism  
Industry

Benefit to the  
economy/ allied  
industries

Technological/  
Cultural  
exchange



# Gaming Cluster & Shifting of offshore casinos



## Organised gaming clusters along with shifting of the offshore casinos to the Chapora or Chicalim Bay

### Proposed Concept

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

- Earmarked Gaming zone to be developed
- Gaming companies shall be awarded license to develop casinos only.
- Government to develop basic infrastructure to increase viability.



**Colvale and off-shore casinos to be moved to Chapora Bay**

### IMPACT

- ✓ Increased viability for private investor to develop & operate.
- ✓ Generate Employment
- ✓ Casino Hub shall attract ancillary developments such as F&B, Hotels etc.
- ✓ Movement of casinos outside Panajim





Module-6  
Responsible  
Tourism  
Initiatives:  
Tourism  
Development  
Cess & Eco-  
labels





# Proposed Responsible Tourism Initiatives



Although tourism has become essential with the economic benefits, tourism activities have strong negative externalities on the environment



**15.22 Lakh**

Projected Population  
of Goa (2020)

<



**80 Lakh**

Tourist footfall  
(2019-20)

## Impact of uncontrolled Tourism activities on Ecosystem

- Deterioration of water quality
- Increasing pollution
- Damage of Coral reef
- Beach erosion
- Unmanaged waste
- Deforestation
- Disruption of wildlife
- Destruction of Marine life

**Introduce "Tourism Development Cess" for developing Tourism Infrastructure in a sustainable manner.**



Authentic  
Goan Food



Hotels &  
Guesthouses



Wellness &  
Ayurveda



Activities for  
tourists



*Bringing the best out of Goa  
Doing the best for Goa*

**Introduce "Eco-labels" for identifying and encouraging green / responsible practices.**



# Introducing eco-labels in Goa



## Step up standards



**86%** Indians expressed interest in changing lifestyle for the sake of the environment

**76%** Indian Millennials said they would be ready to pay more for sustainable products and services

**89%** Indians said they would address climate change more actively if companies offered alternative solutions

**Goa Tourism could create an eco-label to meet the demand for tourism eco-products**

## Increase value

Investments in socio-eco responsible business models often means a higher price to pay for clients

### *Indicative prices in Goa*

	Eco	Classic
Dolphin tours	Rs. 3,500	Rs. 250
Diving	Rs. 6,500	Rs. 1,500
Cottage	Rs. 3,000	Rs. 1,000

Label: gives **legitimacy** to such price difference

## Change of paradigm

Eco-tourism label: first time in India!

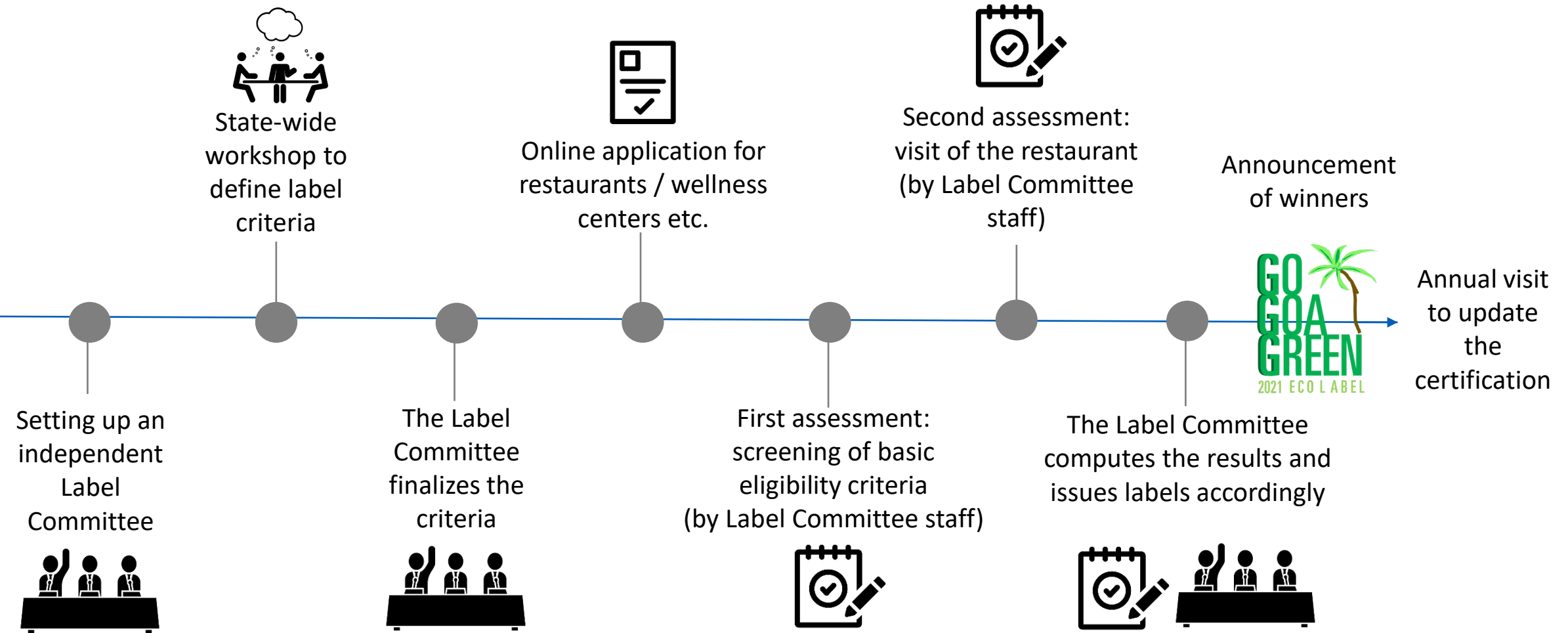
Opportunity for Goa to brand itself as the **national leader in Responsible Tourism**



This new image would automatically draw different crowds to Goa



# Process of eco-label issuance



**An independent label committee comprising of subject matter experts including locals / housewives / chefs etc. (especially labels for authentic Goan food), industry stakeholders and Government officials.**



# Monetary benefits of having Eco-labels



## Establishments with Eco-labels gets additional benefits on Tourism Development Cess



- Establishments with “Gold” category Eco-label will be get 25% refund of Tourism Development Cess.
- The amount can be used by these establishments for various green initiatives.



- Establishments with “Silver” category Eco-label will be get 12.50% refund of Tourism Development Cess.
- The amount can be used by these establishments for various green initiatives.



- Establishments with “Bronze” category Eco-label will be get 7.50% refund of Tourism Development Cess.
- The amount can be used by these establishments for various green initiatives.

**All establishments are required to deposit the Tourism Development Cess to Goa Tourism.**

**The claim can be taken in the form of a refund by all eligible units.**



# Case Studies from other countries



USA



**Foundation:** 1990

**Model:** Not-for-profit

**Complexity :** Extremely detailed, 403 criteria

**System:** Very elaborate weighted points system



UK



**Foundation:** 2010

**Model:** Not-for-profit (membership)

**Complexity :** 10 major categories of criteria

**System:** online self-assessment, Three stars ranking



France



**Foundation:** 2019

**Model:** Business (consultancy)

**Complexity :** 8 straightforward criteria

**System:** Simple checklist with three levels of achievement



# Tourism Development Cess : Impact of tourism



GTB can utilize Tourism Development Cess for undertaking various development / responsible tourism activities in the State.

**Tourism Development Cess to be paid by Tourists**  
(Collected by Registered Hotels with DOT)



**OPTION 1**

**Flat Fee  
separate for  
domestic &  
foreign tourist**



**OPTION 2**

**Flat Fee  
separate for  
domestic &  
foreign  
tourist**



**OPTION 3**

**% of the base  
tariff**

**To be paid at the accommodation unit at the time of booking**

**Illustrative list of utilization of Tourism Development Cess**

- Development of basic amenities like parking lots, toilets, surveillance systems, etc. at tourism hotspots.
- Standardization of shack structures and setting up sewerage system at shack location;
- Waste management on beach access roads;
- Messaging on beaches to raise awareness among tourists;
- Setting up and maintaining trekking trails;
- Development of inland transport system fuelled with green energy (solar energy).
- Setting-up a green label system to reward hotels and restaurants with outstanding eco-responsible practices
- Preventive measures to restrict beach erosion
- Fund for wildlife protection, especially for turtles and dolphins;
- Cleaning up the sea and shallow waters;



# Similar tourism tax adopted by various countries

19/28

members of  
European Union  
member states



Have adopted at least one  
measure related to  
imposition of tourism tax

Location	Year	Amount
Venice	2019	Rs. 250 to 850 (€ 3 to 10) per day, as per the season
Edinburgh	2019	Rs. 230 (£ 2.5) per room/night for one week
Lisbon	2016	Rs. 85 (€ 1) per night for one week
Balearic Islands	2002	<ul style="list-style-type: none"><li>Rs. 340 (€ 4) per night for luxury hotels</li><li>Rs. 255 (€ 3) per night for mid-range hotels</li><li>Rs. 170 (€ 2) per night for apartments and cruse ships</li><li>Rs. 85 (€ 1) per night for campers and hostels</li></ul>
Bali	2019	Rs. 755 (\$ 10) per entry
Bhutan	2020	Rs. 1,200 (1,200 ngultrums) per entry for Indians

## SUCCESSFUL EXAMPLE : Balearic Islands (SPAIN)



2002

Introduced  
tourism Tax

2016

Increased rate of Tax &  
collected  
INR 288 crore (€ 34 million)

2019

Supported Major  
Tourism initiatives

- Improving durability of sewage system
- Reconstructing piers
- Installation of pedestrian walkways
- Infra development for electric vehicles
- Restoration of trails & bicycle routes
- Purchasing heritage asset
- Improving water infrastructure



Module-6  
Tourism  
Performance  
Index

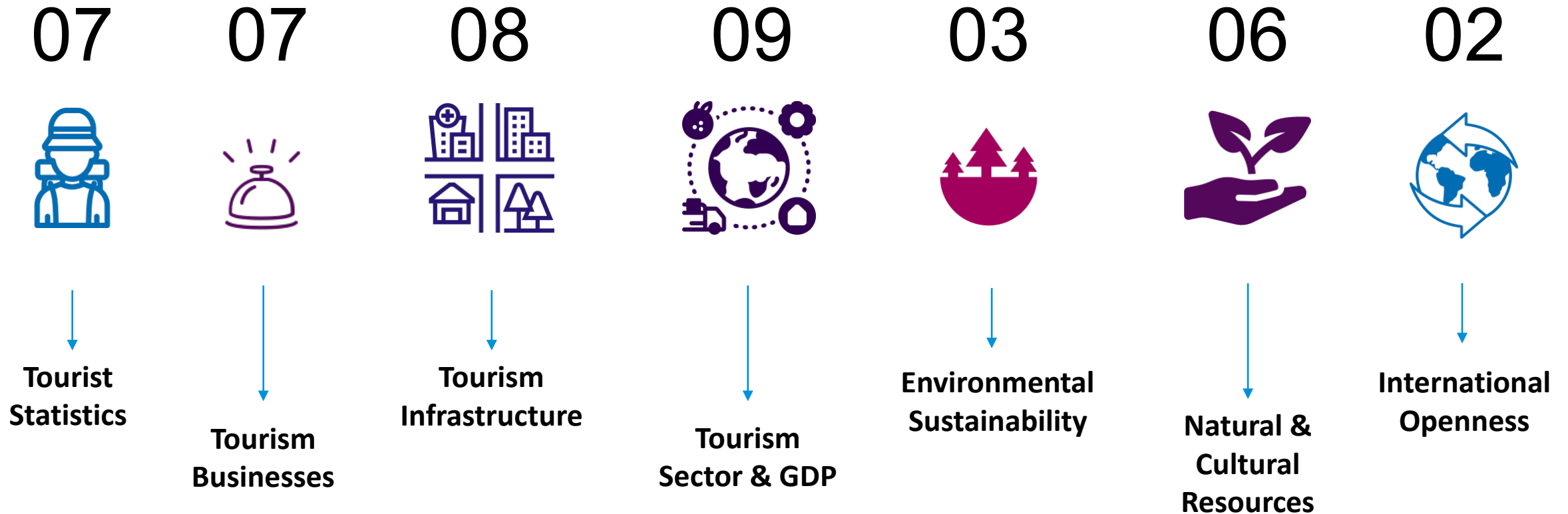




# Performance Index



**Total 42 parameters across 7 categories will be monitored on periodic basis for overall Tourism Development.**



The parameters covers SDG Goals, State assessment framework of MOT, Climate & Bio-Diversity Metrics and other KPIs for State Tourism.



Module-6  
Carrying  
Capacity &  
Tourism  
Hotspots



# Carrying Capacity

Year 2019

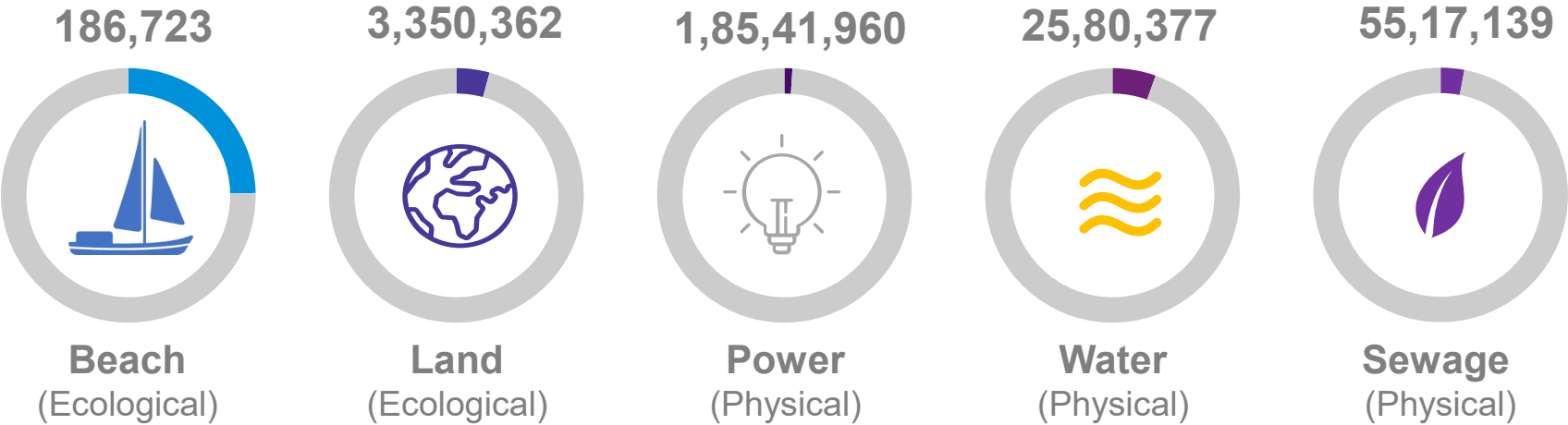
140,647

Peak Tourist Footfalls in Goa (anytime)

Year 2046

33,43,846

Peak Tourist Footfalls in Goa (anytime)



## Socio-Economic Carrying Capacity



Low

The ratio of local to tourist arrival is **11.22:1** as against the accepted norm of **2.50:1**

## Ecological Carrying Capacity



Medium

- Considering at 2019 levels, beach carrying capacity may be breached and requires diversion of tourists to hinterlands.
- The ecological carrying capacity of Goa is estimated to be sufficient till next 25 years.

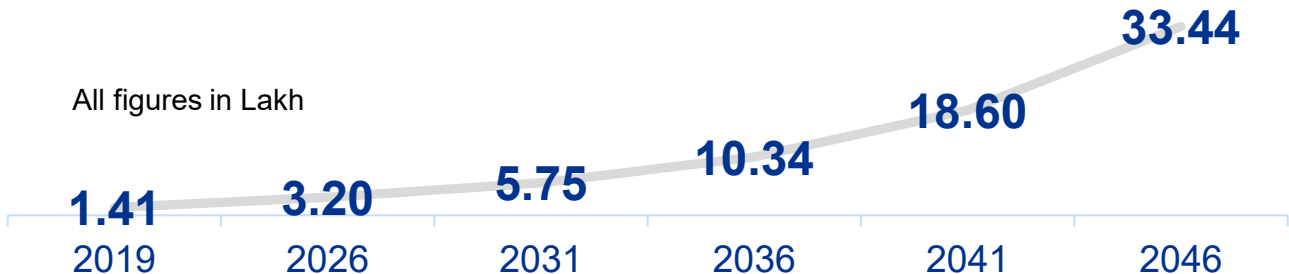
## Physical Carrying Capacity



Low

In spite of additional capacities in the next 5 years, Water will pose as a constraint for carrying capacity. Although there are no constraints with Power and Sewage (incl additional capacities), non-uniform distribution of utilities will lead to outages.

Growth in Peak Footfalls



All figures in Lakh

\*Considering average tourist arrival per day (during peak season i.e. December 2019) and average length of stay of 3 days.



# Tourism Hotspots



## Top 20 Hotspots in the State

Sr. No.	District	Taluka Name	Category	Attraction Name	Stakeholder Recommendations	Listed on Tour Operator Itinerary	Social Media Popularity	Tourist attraction within 5 Km	Final Score
1	North Goa	Tiswadi	Churches	Basilica of Bom Jesus	5	5	5	5	5.0
2	North Goa	Bardez	Beaches	Candolim Beach	5	5	5	5	5.0
3	South Goa	Salcete	Beaches	Colva Beach	5	5	5	5	5.0
4	North Goa	Bardez	Beaches	Morjim Beach	5	5	5	5	5.0
5	North Goa	Bardez	Beaches	Anjuna Beach	4	5	5	5	4.8
6	North Goa	Bardez	Others	Aguada Fort	5	5	5	3	4.7
7	North Goa	Bardez	Beaches	Calangute Beach	5	5	5	3	4.7
8	North Goa	Bardez	Others	Chapora Fort	5	5	5	3	4.7
9	North Goa	Pernem	Beaches	Arambol Beach	3	5	5	5	4.6
10	North Goa	Tiswadi	Churches	Church of St. Francis of Assissi	3	5	5	5	4.4
11	North Goa	Ponda	Temples	Shree Manguesh	3	5	5	3	4.3
12	North Goa	Tiswadi	Beaches	Miramar Beach	3	5	5	3	4.3
13	North Goa	Tiswadi	Churches	Se Cathedral	3	5	5	3	4.3
14	South Goa	Sanguem	Others	Dudhsagar Waterfalls	3	5	4	5	4.2
15	North Goa	Bardez	Beaches	Baga Beach	5	5	3	3	4.0
16	North Goa	Ponda	Temples	Shree Shantadurga	4	5	3	3	3.8
17	North Goa	Bardez	Beaches	Vagator Beach	4	5	3	3	3.8
18	South Goa	Canacona	Beaches	Palolem Beach	3	5	3	3	3.6
19	North Goa	Bardez	Beaches	Coco Beach	2	5	5	1	3.6
20	North Goa	Ponda	Gardens & Parks	Savoi Plantation Spice of Life	3	5	2	5	3.5

## Parameters for identification of Hotspots



**Recommendation of Stakeholders**  
(Locals and Accommodations) **25%**



**Listing of attraction on Tour Operator's Itinerary** **25%**



**Social Media Popularity**  
(accessibility, existing condition of the site, overall experience) **35%**



**Tourist attractions within 5 Km. radius**  
(presence of other tourist attractions in proximity) **15%**

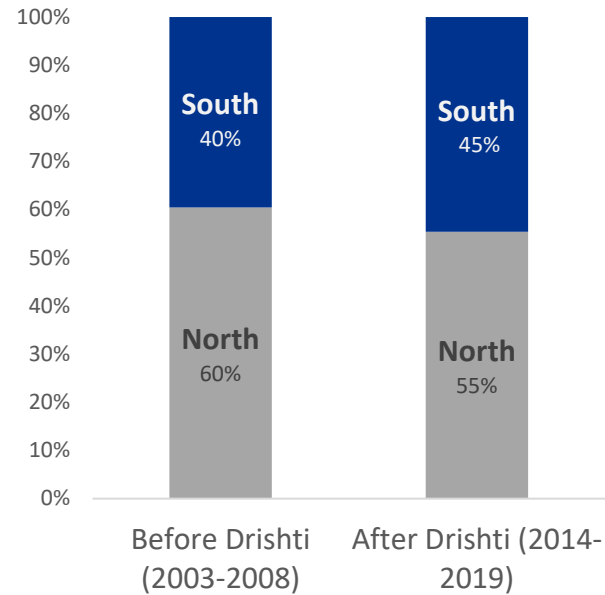


Module-6  
Tourism  
Safety and  
Grievance  
Redressal



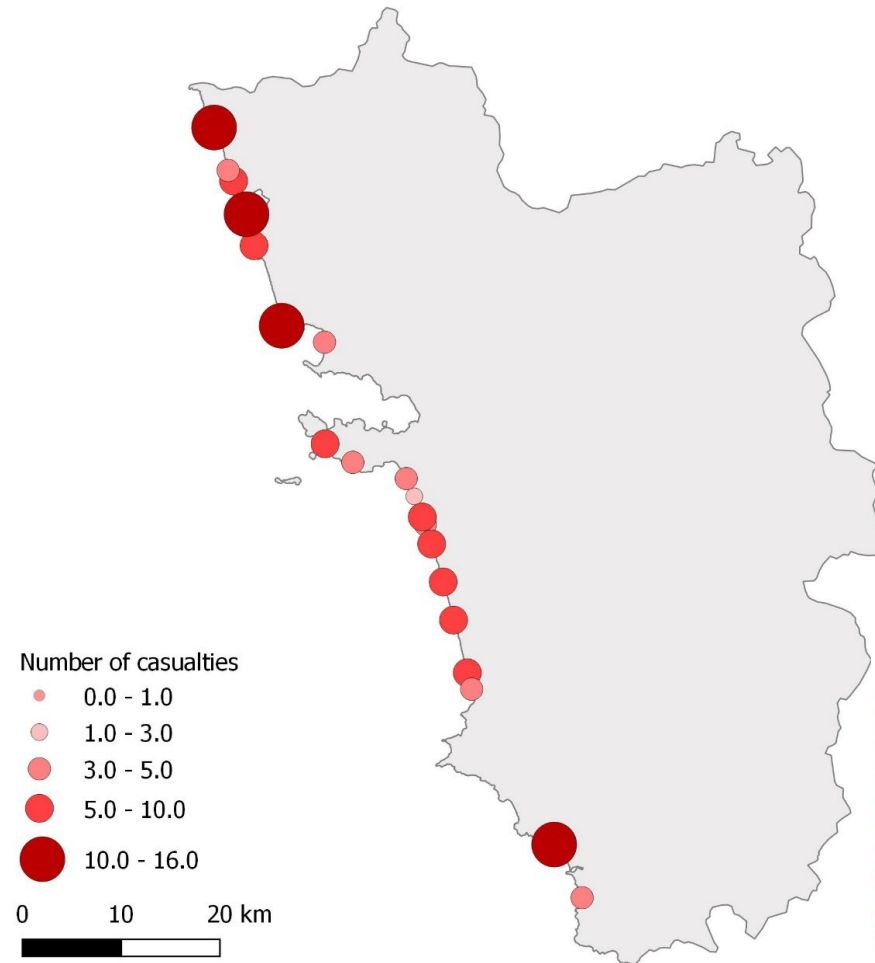


# Where do incidents happen?

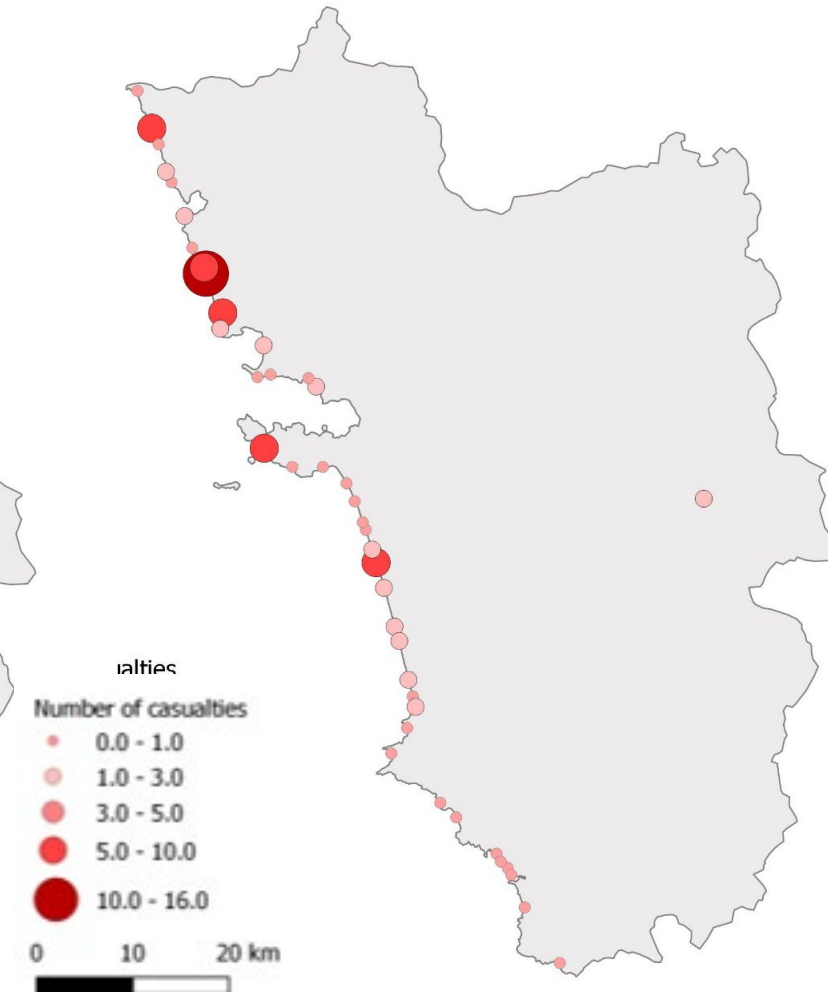


- The average number of casualties per location has reduced
- Yet, incidents are now more spread out over the whole coast, making life-guarding even more challenging

Pre-Drishti: 2003-2008

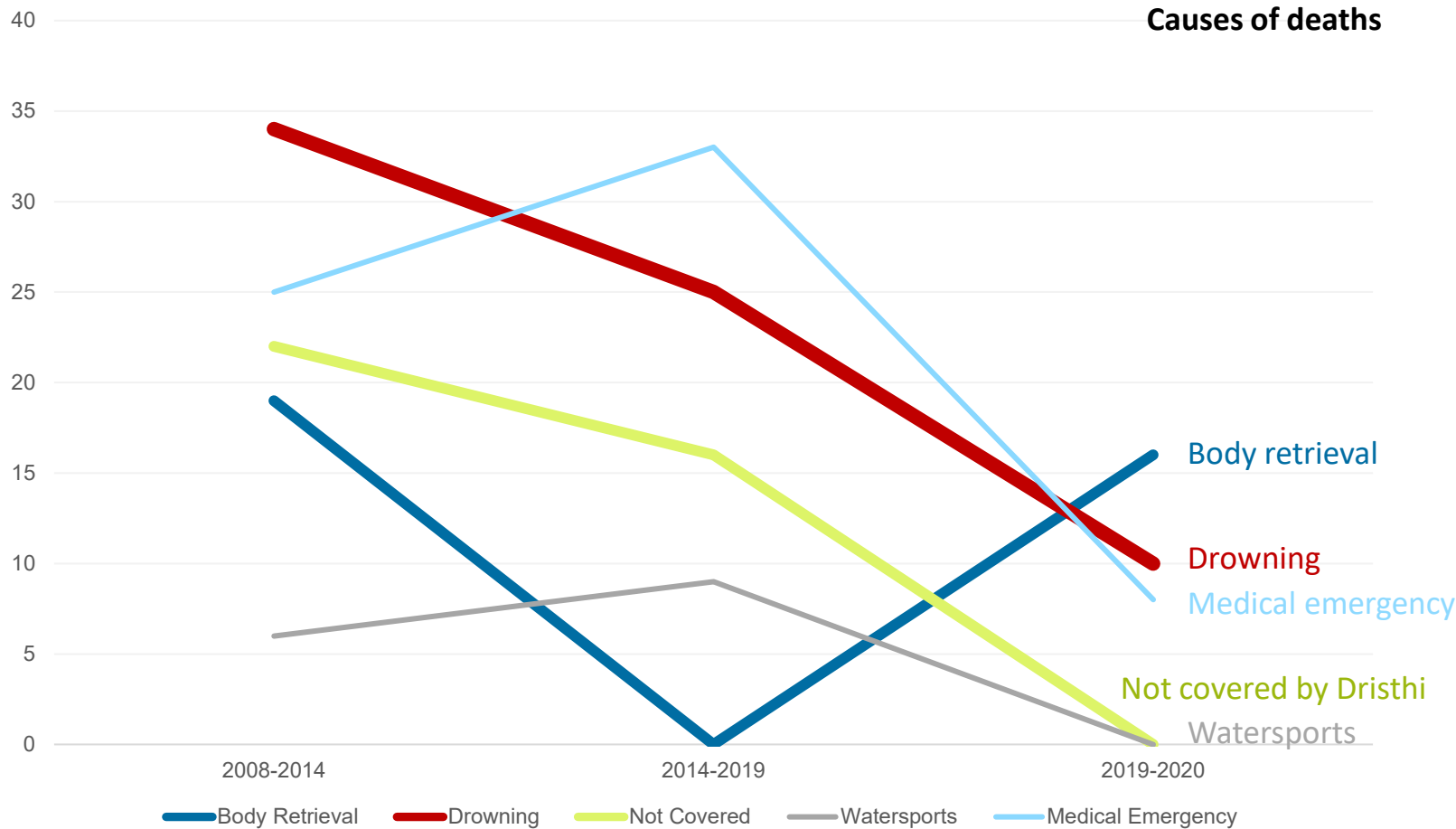


Post-Drishti: 2014-2019





# How do people die on Goa's beaches?



In addition to drowning deaths happening during the lifeguards' duty, other types of casualties also happen:

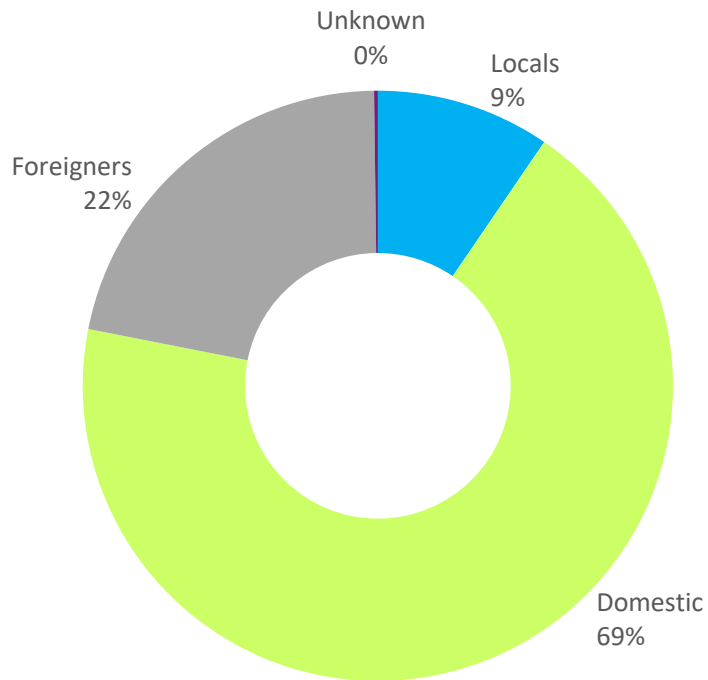
- **Body retrieval:** body found in the morning (often due to drowning at night)
- **Medical emergency:** cardiac arrests or other such medical cases happening on the shore
- **Not covered:** Drowning happening in a coastal area not covered by Drishti
- **Watersports:** Death happening while tourists indulge in watersports



# Who are the victims?



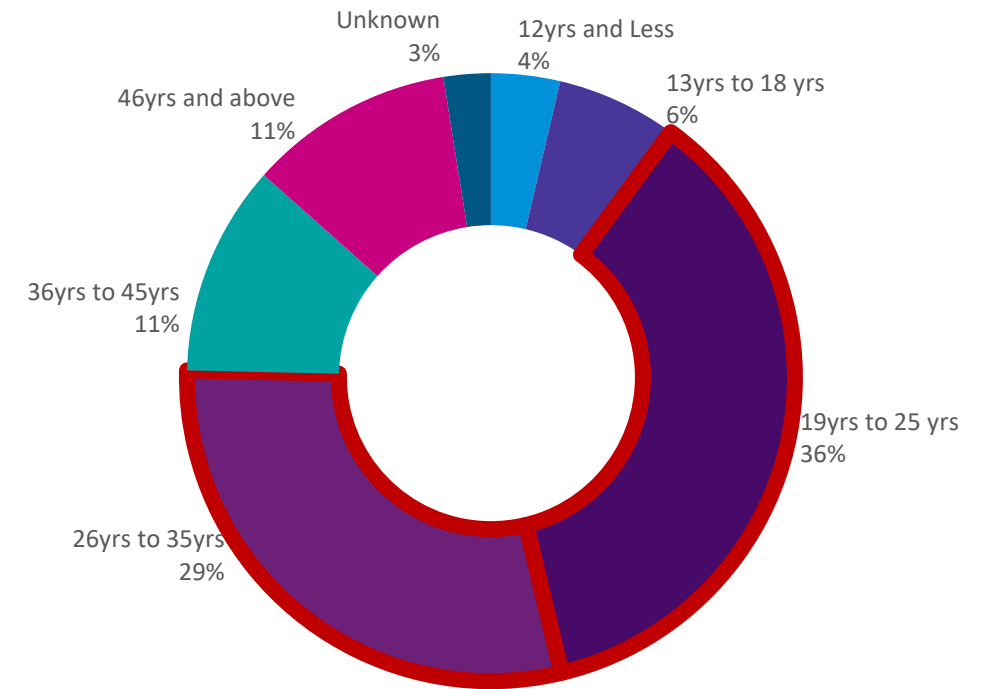
## Origin of victims of drowning



Although foreigners contributed to only **12%** of tourism footfall in 2018, they represented **22%** of deaths by drowning.

A possible reason is that foreigners tend to go swimming more often than average Indian tourists

## Age of victims of drowning



2/3 victims (65%) were aged between 19 and 35 years old.

# Tourism Hotline & Customer Support



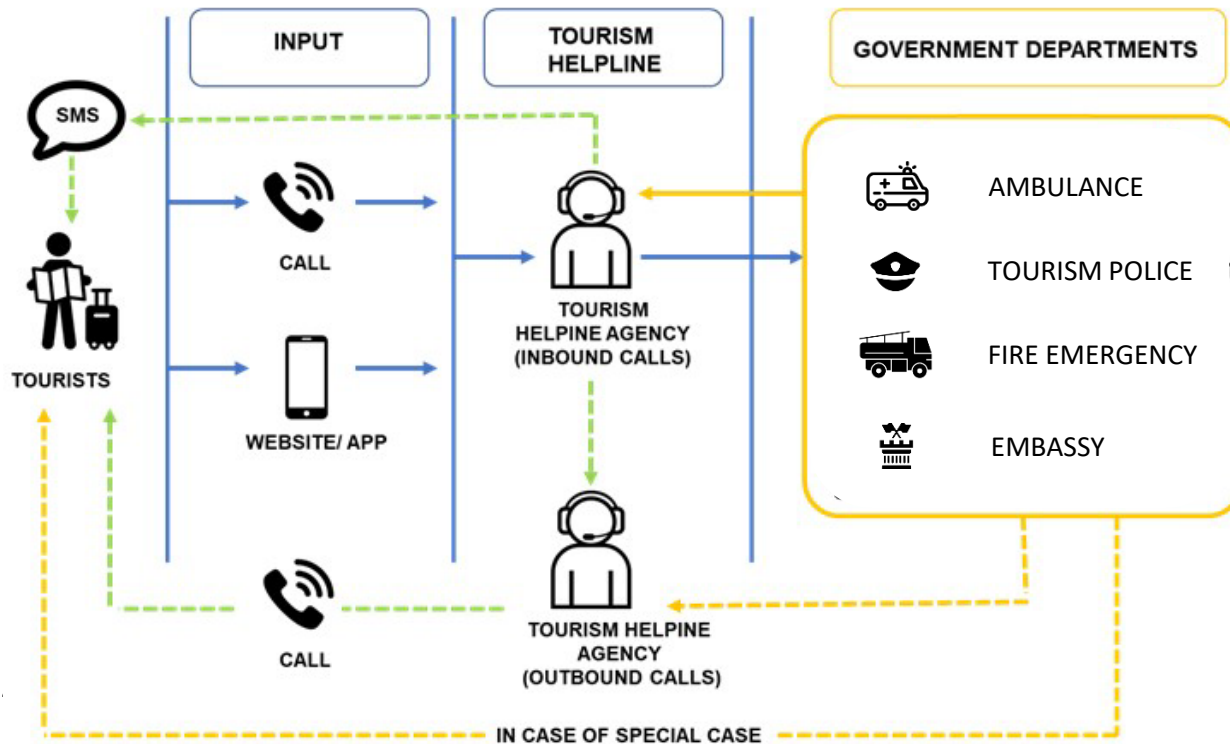
## TOURISM HOTLINE

Introduction of a Toll-free hotline number to allow tourists in distress to get resolution



## GRIEVANCE REDRESSAL

A call center with customer representatives trained to handle various tourist distress call



## INFORMATION CAPTURED

1. Name
2. Contact Number
3. Address / source location
4. Queries

## Services Provided:

- ✓ 24x7 Multi-lingual Tourism Support
- ✓ Grievances requiring Tourism Police support
- ✓ Medical exigencies
- ✓ Fire exigencies
- ✓ Embassy
- ✓ Hotel / Residency Bookings
- ✓ Bookings for Guides, NTS services, taxi services and other tourism attractions
- ✓ Beach cleanliness
- ✓ Upcoming events etc.



# Manpower Requirement of Tourism Helpline



**TEAM  
REQUIRED**

**Project head cum operation manager**

**Call center manager**

**Quality team lead**

**Internal call quality auditor**

**Trainer**

**Team lead**

**IT team**

**Software team**

**Data analyst**

**MIS expert**

**Data entry operator**

**Call Center Executives**

## OPERATING HOURS OF TOURISM HELPLINE

S.No	Campaign	Prime Working Hours	Non- Prime Working Hours
1	Inbound calls	9.30 am to 5.30 pm	5.30 pm to 9.30 am
2	Outbound calls	9.30 am to 5.30 pm	5.30 pm to 9.30 am

# Tourism Police



**Tourism Police, a special branch in the police department was created in 1990.**



**Police Control Room Dial  
112**

## REQUIREMENT

**Increase in tourism police at strategic locations such as beaches, TIC, events etc. for quick resolution**

**Provision of Police Kiosks at the popular beaches / Tourism hotspots**



## ILLUSTRATIVE DUTIES

- To ensure no illegal activities are being conducted in tourist centric areas
- Patrolling of beaches of Goa to keep a watch on rowdy behavior, stop those found drinking, etc.
- Shall be required to be deployed in 3 shifts to ensure 24X7 surveillance
- Timely response to the issues raised by tourists via helpline
- Helps the tourism department in the implementation of provisions of the Goa Registration of Tourist Trade Act, 1982
- To assist in crowd management during events



# Widening the scope of Tourism Activities



## Target illegal activities

- Illegal tourism activities represent a loss of earning for the state, unhealthy competition for legal businesses and potential risks for tourists
- Estimation survey: More than 70% accommodations are unregistered
- Estimation Small & Medium Hoteliers Association: ~ 80%

- Opportunity for unregistered tourism establishments to register
- Regularize OYO homes, Airbnb, rented villas/apartments etc.
- Imposing fines on illegal establishments



## Eco-tourism policy

- Eco-tourism has been identified as a priority sector for Goa, but this represents a sensitive matter, given the fragility of Goa's eco-system

- Guidelines for nature-based activities
- Incentives for eco-responsible practices through labels



## Transport policy

- Transport inside Goa is often expensive
- Tourists complain about the lack of standards

- Taxi: enforce meter policy
- Introduce AC buses b/w airport / stations



## Jetty policy

- As In-land water transportation has been identified as a strategic investment, it is required to set rules for the construction of new jetties and introduction of new vessels

- Draft a jetty policy to regulate the sector



## Investment environment

- Investors find it difficult to invest in Goa
- Hard to obtain permissions, NoCs, clearances, etc.
- Missed opportunities for the state

- Implementation of a single window system
- Guidelines for CSR investment in tourism



## Nightclub policy

- Nightclubs & Discotheques working at extended hours majorly attract Tourists

- Better surveillance under the ambit of Department of Tourism & drafting a policy

# Stepping up measures to raise awareness

It is required to inculcate a healthy beach culture with informative signages / boards

Where?

- At the main entrance of all usable beaches of Goa
- Additional efforts in beaches with the highest number of casualties: a board every 50 meters

*Calangutre, Candolim, Baga, Arambol, Colva, Miramar, Sinquerim (Aguada), Benaulim, Baina, Betul and Dudhsagar*



Informative : simple  
and useful



Smart: tag line to give an identity  
to the campaign



Witty : it is easier to attract the attention by  
making people smile



# IT interventions



## Tourism footfall statistics

It is mandatory for every registered and operating Hotel/Guest House in a tourist area to submit the “Statistics Proforma”

Software to be provided to registered accommodation units

Accommodation units to feed tourist data on daily basis



Big Data Analytics



Real Time Tourist Count



## Monitoring of beaches of Goa

A Mobile App for curtailing the illegal activities such as putting more deck beds than they are permitted, keeping deck beds near the seashore, hawkers selling goods, commercial activity without departments approval, and reporting drowning cases on Goan beaches.

Stakeholders such as Shack allottees, lifeguards, beach cleaners and beach wardens to be given access rights to report

App shall record video or photographs which can be used as evidence



## Monitoring of Garbage Disposal

- A Mobile App to monitor the cleanliness of all Goan beaches.
- Appointed beach cleaning agency and supervisors who record:
- 360-degree videos of each beach stretch
- Videos/photographs of bins kept at beach stretch.
- To provide monitoring inventory of all the equipment provided



# Thank you

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