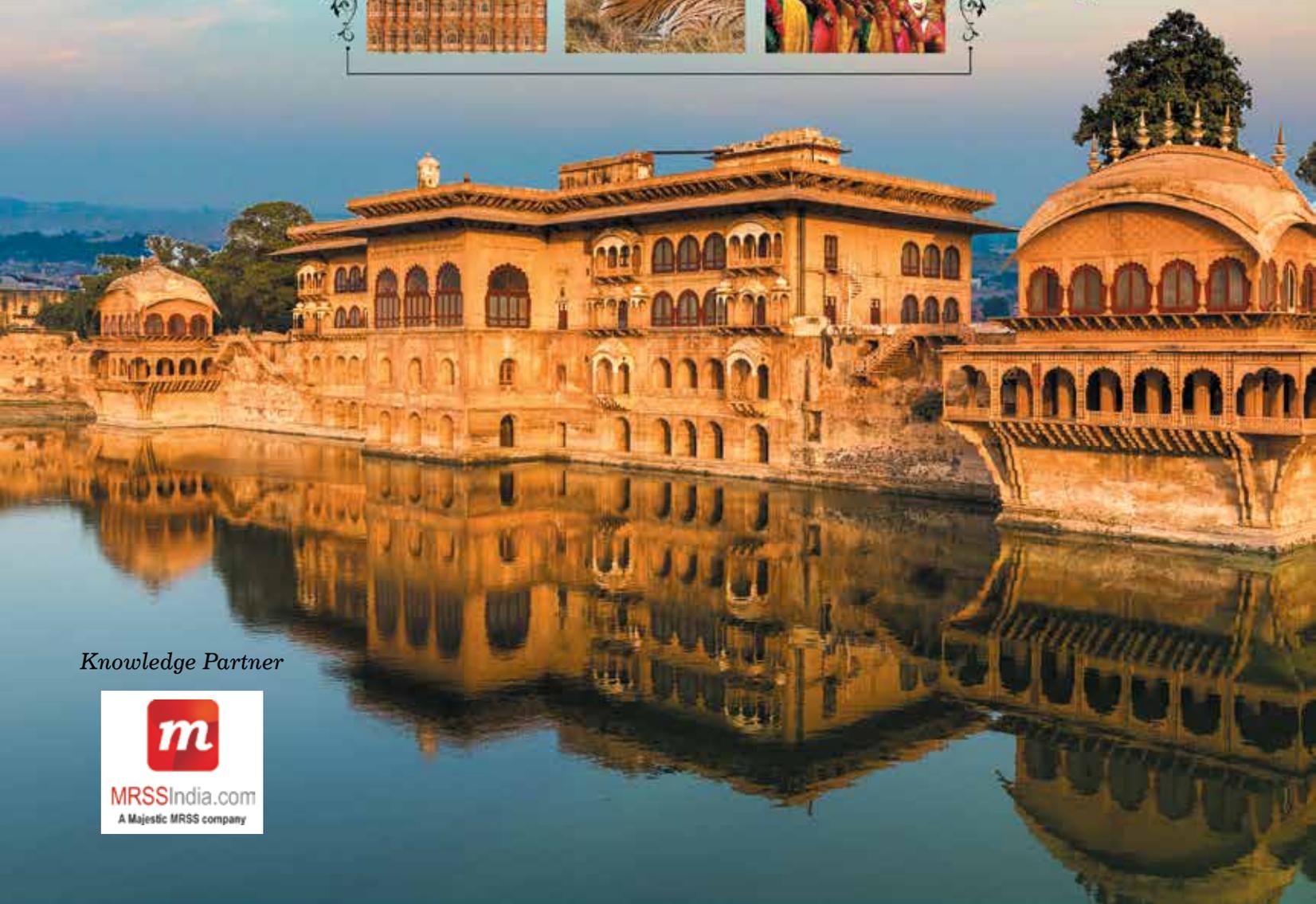


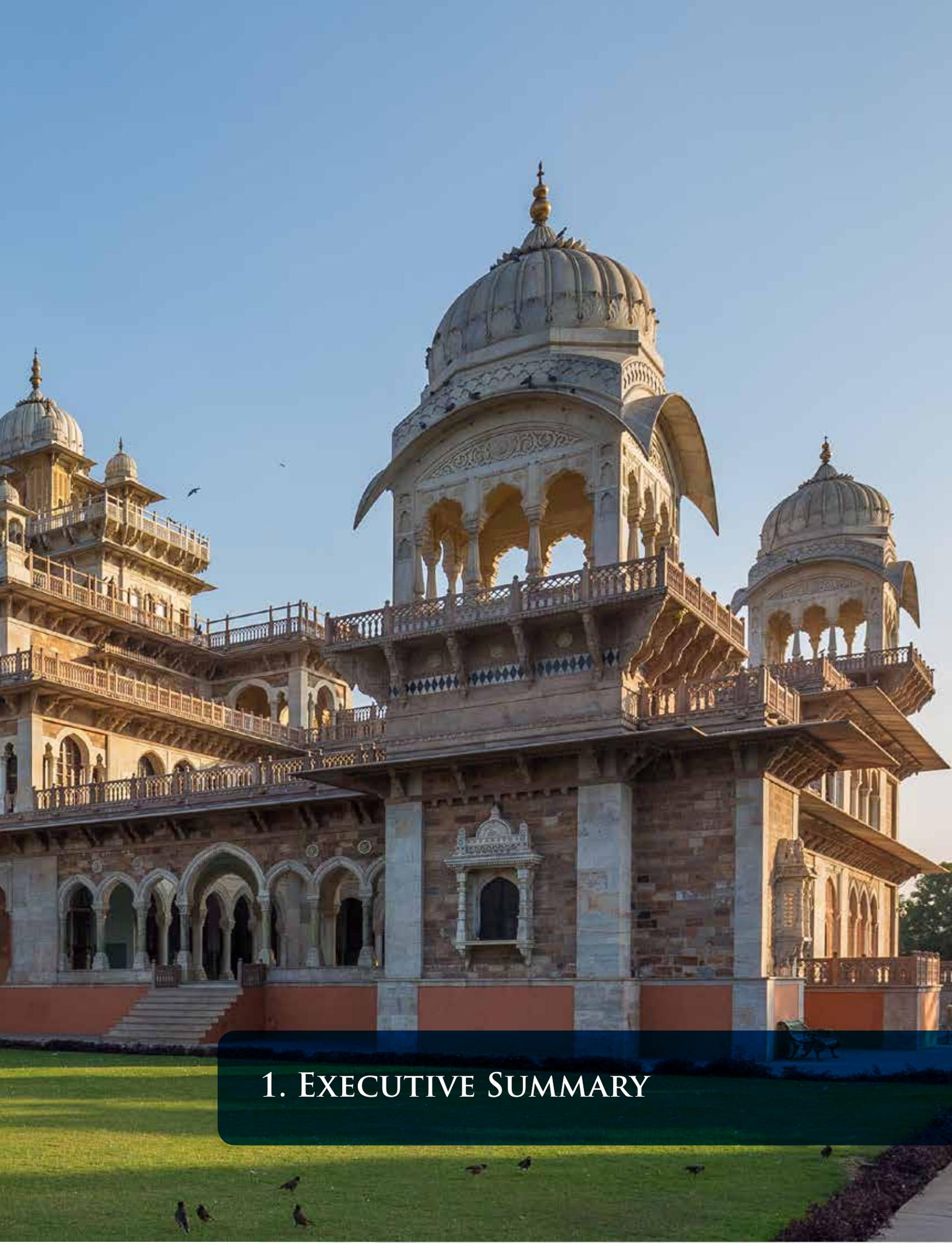
RAJASTHAN

REVELATION BEYOND THE OBVIOUS



Knowledge Partner





1. EXECUTIVE SUMMARY



EXECUTIVE SUMMARY



A state with the largest area within the Indian Union, most of it either rocky or arid, harbouring a rich resource of geographical wonders, exquisite minerals, heritage, royalty, history, architectural marvel, mesmerizing art and crafts, lip smacking cuisines, and an epitome of hospitable hosts, has been one of the most sought after destinations worldwide. All the aforesaid factors have made Rajasthan the poster boy of Indian tourism sector. The incredible transformation of this State from a hot wasteland into a sprawling tourism hotspot is no less than a miracle in the world tourism ecosystem.

The State economy, growing at a CAGR in excess of 12% for the period 2005 -06 to 2015-16 has a considerable contribution from the Tourism sector. The Tertiary sector, of which Tourism is a part, contributes approximately 48% to the State economy and is growing at a CAGR of 17.3% for the period under consideration.

Tourist flow analysis to the State of Rajasthan over the years has indicated the following trends, which clearly points towards a dynamic shift:-

- Foreign tourist visits to the State has entered a period of slow growth in last few years. In fact, Rajasthan slipped from the Top 5 States, which it had successfully grown and sustained over last few decades.
- An analysis of the seasonality of tourist flow indicates lesser foreign tourist visits to the State in specific intervals.
- The bright spot however remains the domestic tourist visits, which has grown in leaps and bounds in consonance with the national trends. Though Rajasthan has lost its' position by a few notches but it has been widely successful in maintain its' position amongst the top 10 visited States of India for the domestic tourists.
- The seasonal tourist flow for domestic tourists also follows similar trends in terms of the foreign tourist flow. However there are a few surges observed in the months of April and September, which indeed are bright spots.





- Keeping this in mind, Government has embarked upon a plan to overhaul the brand image of the State. Since then an aggressive marketing campaign has been designed by the Government.
- This has shown tremendous results with the year 2016 registering a 17% growth over the previous year, in terms of tourist arrivals.

Stimulus behind the Transformation in Rajasthan Tourism Offering	<ul style="list-style-type: none"> • Stagnating tourist flow inflicted upon by economic downturn, lesser variety / entertainment facility in destinations • Crowded tourist destinations • Stiff competition from neighbouring States • Infrastructure gaps in certain pockets • A well to do Urban Indian Middle class willing to spend on experiences • Well geared up Road and Rail infrastructure as well as connectivity with spots earlier unknown • Changing preference and major dependence on digital modes of communication
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Comparative analysis of differentiation in presenting Rajasthan as a tourist destination

Parameters	Then	Now
Tourism Strategy	<ul style="list-style-type: none"> • Majorly Destination specific 	<ul style="list-style-type: none"> • Predominantly Theme specific
Focus	<ul style="list-style-type: none"> • Mainly on heritage and legacy 	<ul style="list-style-type: none"> • On variety of tourism offerings. Proper segments defined. New products introduced
Steps Taken to boost tourism	<ul style="list-style-type: none"> • Development in Silos, often lacked proper synchronization within State as well as Central Agencies 	<ul style="list-style-type: none"> • Well-Co-ordinated and concerted action with State as well as Central agencies
No. of Destinations/ Attractions	<ul style="list-style-type: none"> • 149 Tourist spots across 13 Destinations (Provided in the Table A 1 in Annexure). Often a few spots were far off from the main city 	<ul style="list-style-type: none"> • 25 Major Destinations • 30 Forts • 39 Palaces • 16 Museums • 13 Wildlife Sanctuaries • 25 Fairs and Festivals • 8 Types of Adventure Tourism across 11 locations • 128 Religious locations



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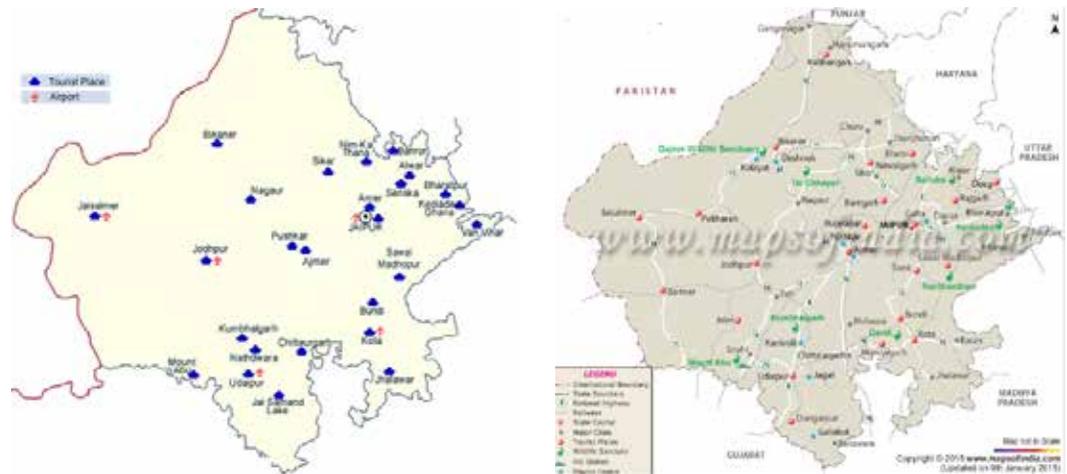


Comparative analysis of differentiation in presenting Rajasthan as a tourist destination

Parameters	Then	Now
Unconventional Experiences	• Handful	• Umpteen
Social Media Boost	• Negligible	• Aggressive and an integral part of the marketing plan
Go to market	• Relied too much on word of mouth	• Well defined plan with targeted intervention

Source: MRSS Analysis based on data from Ministry of Tourism, Rajasthan Tourism

Destinations in Rajasthan – Then Vs Now

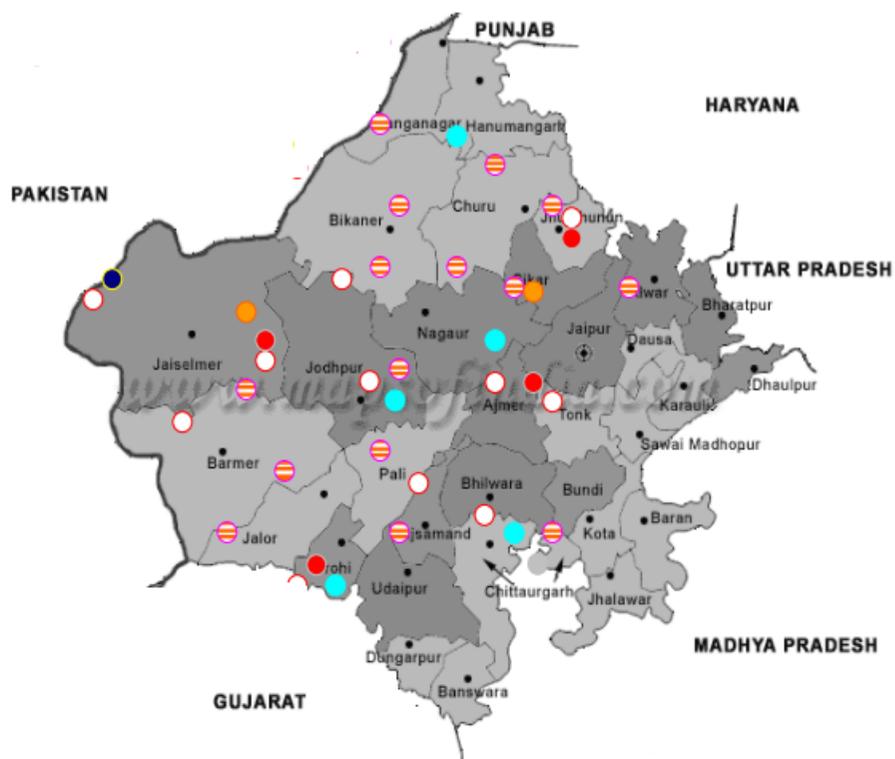


The focus clearly is now on the following:-

- Promoting new concepts of tourism
- Identifying and developing new destinations
- Introducing new concepts to traditional destinations
- Strengthening the infrastructure and addressing the gaps, especially accommodation units
- Encouraging private investment
- Work in a collaborative manner towards successful implementation of Vision 2022 for the State
- Aggressive campaigning using Print, Electronic, Digital and Social media channels



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- Indicates that the regions to be developed at national level
- Telecom /IT city/Parks & Bio-Tech Parks
- ▤ Industry parks
- Knowledge centers/parks
- Sports centers/parks
- Indicates regions to be developed at international level

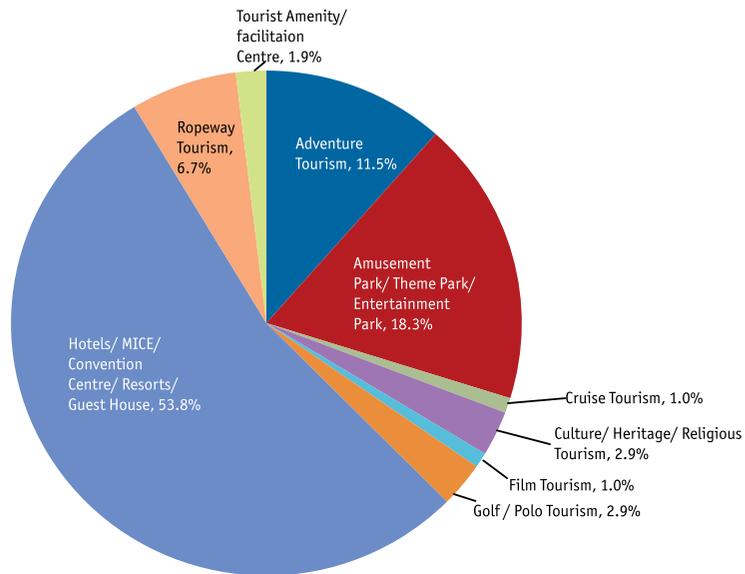


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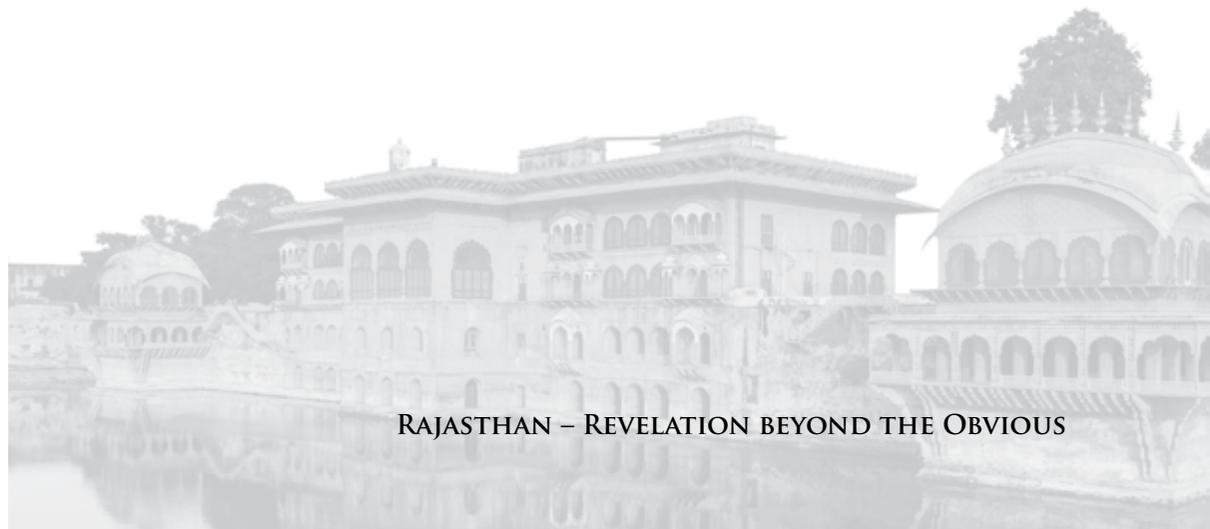
Investment opportunity

As per Incredible India Investment Summit, the following investment opportunities are available in Rajasthan immediately



FICCI MRSS 6 Point Suggestions to boost tourism in the State

- Maintain communication with prospective tourists
- Monitor and maintain co-ordination with other departments for successful implementation of Vision 2022
- Strengthen the India Tourism Offices Overseas and State Tourism Offices in target States by providing monthly targets to publicize Rajasthan Tourism
- Maintain co-ordination and align with the Centrally Sponsored schemes
- Create a market intelligence system to track trends and competition
- Have synergy with the neighbouring states





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