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CHAPTER 2:

EXECUTIVE SUMMARY



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2.1.1 This chapter provides a summary of the findings of the study with respect to development of tourism in Rajasthan, deficiencies that exist as well as the investment required for various tourism related infrastructure by the year 2021.

2.2 OVERVIEW OF TOURISM IN RAJASTHAN

2.2.1 Rajasthan has emerged as one of the popular tourist destinations in India for both domestic and foreign tourists. The number of tourist arrivals in the state has increased four fold in the last thirty years and in 2001, the state received 0.6 Mn foreign tourist and over 7 Mn domestic tourists.

2.2.2 The state is known for its diversity in terms of natural resources, cultural heritage, historical as well as archaeological wonders and rare wild life. The forts and palaces, heritage hotels, colourful fairs and festivals, local art and handicrafts, etc. has been a unique selling proposition for tourists coming to the state. The desert environment in the western parts of the state is also a major attraction for visitors, particularly the foreign tourist.

2.2.3 Four decades ago tourism in Rajasthan was small industry that was largely confined to the elite foreign tourists and domestic pilgrim traffic. Tourist arrivals were restricted to a few thousand tourists annually and were primarily recorded in select places such as Jaipur, the state capital, Udaipur and Jodhpur (for foreign tourists) and the pilgrim centres of Ajmer, Pushkar and Nathdwara (for domestic tourists). The employment in the sector and the sector's contribution to the state economy, as well as employment potential were limited.

2.2.4 However, over the last few decades, due to the focussed efforts of Rajasthan Tourism, various State Government agencies, select entrepreneurs / individuals, tourism has grown from an elite and pilgrim phenomenon to a mass phenomenon putting Rajasthan firmly on the foreign and domestic tourist map. Also, as compared to the past, where the tourism in the state meant desert tourism, heritage tourism (forts, palaces, etc.) and pilgrim tourism, today the tourists have a wide canvas of places, attractions and activities to choose from in the state, which enhances the overall tourism experience.

2.2.5 The industry today employs over one lakh people directly and over three lakh people indirectly. Its contribution to the State economy is estimated to be over Rs 2000 Cr. presently. Given the increasingly important role that the sector plays in the overall socio-economic development of the state, the State Government of Rajasthan has accorded an industry status to tourism from the year 1989.

2.2.6 As the nodal agency to promote tourism in the state, the Department of Tourism (DoT), Rajasthan has played a key role in this growth along with the DoT promoted Rajasthan Tourism Development Corporation (RTDC), which was established in November, 1978 primarily to act as catalyst by developing tourism infrastructure facilities (for domestic



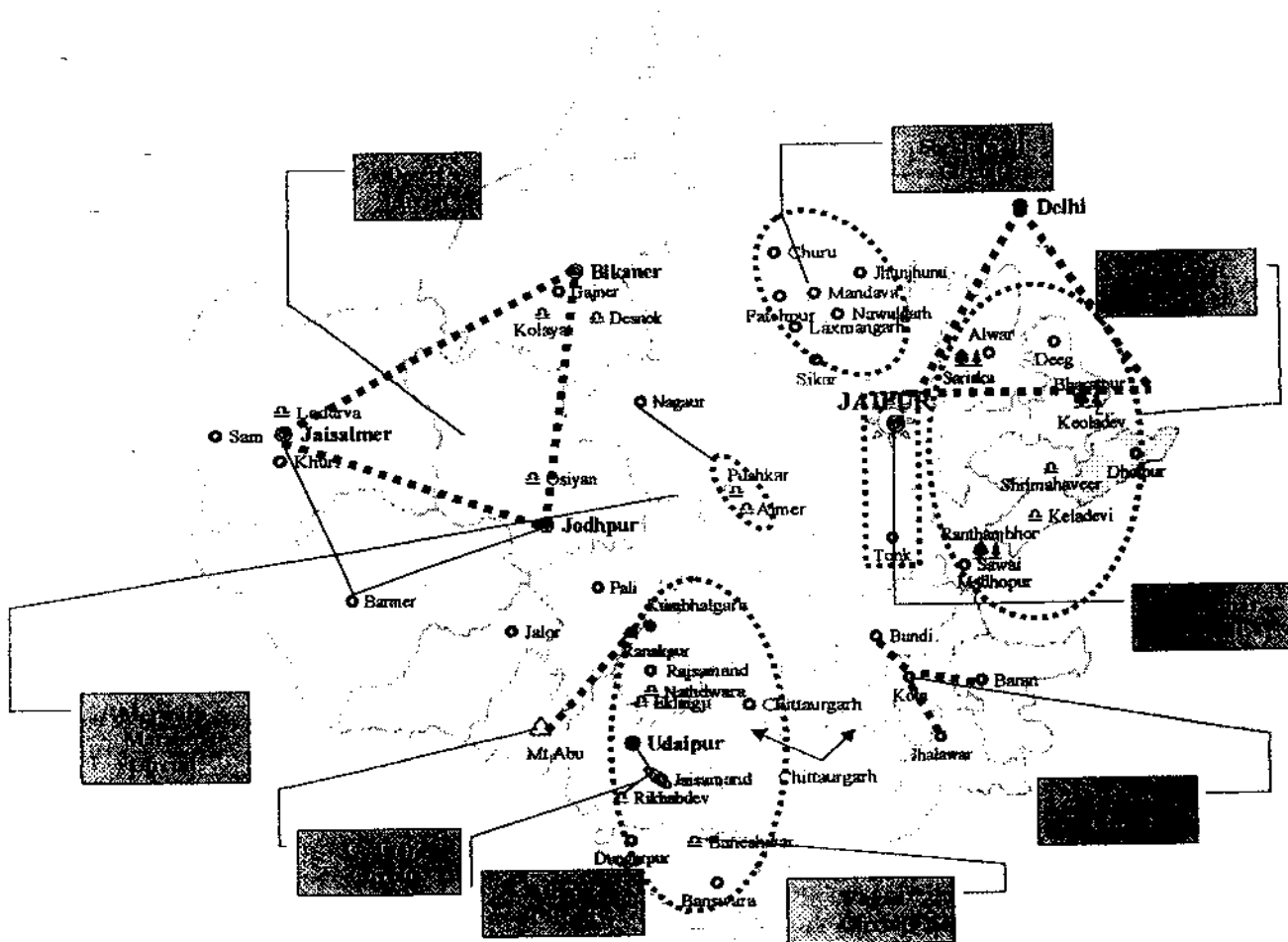
and foreign tourists), particularly by way of basic amenities like accommodation, catering and organised tours / sight seeing facilities.

Major Tourist Destinations in Rajasthan (Circuits and Standalone Destinations)

2.2.7 Exhibit 2.1 indicates the major tourist circuits and locations in Rajasthan.

Exhibit 2.1

Tourism Map of Rajasthan – Major Tourist Circuits



2.2.8 As seen, Tourism in Rajasthan extends almost through the entire state, though tourist activity is concentrated around six main cities, which serve as 'tourist hubs' for places of tourist attraction in and around these 'hubs'. These tourist 'hub' cities are Jaipur, Jodhpur, Jaisalmer, Bikaner, Udaipur and Mount Abu. Almost every tourist (with the possible exception of pilgrim traffic) who visits Rajasthan would visit one or more of these 'tourist hub' locations as part of his / her tourist itinerary. Each of these hubs usually form part of a Tourist Circuit as follows:

- Jaipur is a part of the popular 'Golden Triangle' circuit (Delhi-Agra-Jaipur) that is very popular with the foreign tourists
- Jodhpur, Bikaner and Jaisalmer form the popular 'Desert Circuit' of Rajasthan



- Udaipur is the entry point into south Rajasthan and forms the hub for tourist activity in the Mewar region of the state.
- Mount Abu, the only hill station in Rajasthan, is largely a standalone tourist destination for domestic tourists (especially from Gujarat but also Western India).

2.2.9 There are nine tourist circuits as identified by Rajasthan DoT, based on their geography, attractions and coverage by independent / group tourists. The study involves an analysis for the following circuits

- Desert Circuit: Jodhpur-Jaisalmer-Bikaner-Barmer
- Mewar Circuit: Udaipur-Rajsamand-Chittaurgarh-Bhilwara
- Vagad Circuit: Dungarpur-Banswara
- Dhundhar Circuit: Jaipur-Dausa-Tonk
- Godwar Circuit: Sirohi-Pali-Jalore
- Merwara-Marwar Circuit: Ajmer-Nagaur
- Brij-Mewat Circuit: Alwar-Bharatpur-Karauli-Dholpur-Sawai Madhopur
- Shekhawati Circuit: Sikar-Jhunjhunun-Churu
- Hadoti Circuit: Kota-Bundi-Jhalawar

2.2.10 These circuits together exhaust all the tourism attractions that Rajasthan has to offer. Of these circuits, the Jaipur (Dhundhar) Circuit, Desert Circuit and Mewar Circuit are well developed, whereas in other circuits, tourism is limited to cover of only 1-2 destinations rather than the circuit as a whole. Exhibit 2.2 provides a snapshot of the various tourism circuits.

Exhibit 2.2

Major Tourist Circuits in Rajasthan

Circuit	Season	Main Tourist Locations	Largest Tourist Location (Tourist arrivals in 2001)	Main Attractions/ Tourism Experience	Other Places of Tourist Interest
Desert Circuit	Oct-Mar	Jodhpur, Jaisalmer, Bikaner	Jodhpur (4.5 lakh)	Sand dunes and desert experience Two unique forts Palaces and carved Havelis	Osiyan (near Jodhpur) Sam and Khuri dunes, Lodurva Jain temples (near Jaisalmer) Gajner Palace and WLS, Deshnok Karni Mata temple (near Bikaner) Barmer
Mewar Circuit	Sept-Mar	Udaipur, Chittaurgarh, Nathdwara*, Kumbhalgarh	Udaipur (7.2 lakh)	Leisure, history and pilgrim Lakes; few forts and palaces Pilgrim centres	Jaisamand Lake, Jagat and Nagda temple ruins, Rana Pratap memorials (near Udaipur) Wild life sanctuary (near Kumbhalgarh)
Vagad Circuit	Sept-Mar	Dungarpur, Banswara	Banswara (1.2 lakh)	Tribal culture, fairs and festivals, forts and palaces and	Baneshwar, Galiyakot (near Dungarpur) Mahi Dam, Arthuna



Circuit	Season	Main Tourist Locations	Largest Tourist Location (Tourist arrivals in 2001)	Main Attractions/ Tourism Experience	Other Places of Tourist Interest
Godwar Circuit	Feb-June Sept-Dec	Mount Abu* Ranakpur	Mount Abu (42.9 lakh)	nature Leisure: Mount Abu, the only hill station in Rajasthan Pilgrim: Ranakpur, one of the five holy Jain places Delwara temples, Nakki lake	(near Banswara) Gaumukh temple, Ashoka temple (near Mount Abu)
Dhundhar Circuit	Sept-Mar	Jaipur*	Jaipur (8.3 lakh)	Forts, palaces, havelis, gardens Jantar Mantar Observatory	Samode Palace and gardens, Abhaneri step-well, Sambhar Lake, Ramgarh Lake (near Jaipur)
Brij Mewat Circuit	Oct-Feb	Bharatpur S Madhopur* Alwar Sarsisar*	Bharatpur (11.1 lakh)	Nature/ Wild life tourism Few forts, palaces and lakes	Shiloh Lake Palace (near Sarsisar and Alwar) Boog (near Bharatpur)
Merwara-Marwar	Domestic- Throughout the year Foreign - Nov	Ajmer* Pushkar	Ajmer (13.2 lakh)	Pilgrimage (Dargah Sharif and Pushkar Lake)	Lakes (in and around Ajmer) Kishangarh (on Ajmer-Jaipur route) Roopangarh (near Kishangarh) Nagaur Fort, Merta City (Nagaur district)
Shekhawati Circuit	Sept-Mar	Sikar Jhunjhunun	Jhunjhunun (11.0 lakh)	Frescos and painted havelis	
Hadoti Circuit	Sept-Mar	Kota Bundi Jhalawar	Kota (6.4 lakh)	Natural beauty Few forts, palaces and temples	

* Also popularly covered as standalone destinations

Desert Circuit (Jodhpur-Jaisalmer-Bikaner)

2.2.11 The Desert circuit includes the popular tourist locations of Jodhpur, Jaisalmer and Bikaner. Barmer and Nagaur are the other locations, which also increasingly form a part of the Desert circuit itinerary. The Desert circuit is popular with both foreign as well as domestic tourists. The circuit is a part of the great Indian Thar Desert and is characterised by the sand dunes spread across the region. The climate is the hot and dry for most part of the year except for a short monsoon period. Hence, tourism is seasonal with the season extending from October to March.

Mewar Circuit (Udaipur-Chittaurgarh-Nathdwara)

2.2.12 The Mewar circuit offers a combination of religion and history. Udaipur is the tourist hub of this circuit, other key tourist locations in this circuit being Chittaurgarh, Nathdwara and Kumbhalgarh. Other places of tourist interest, though less frequented are Jaisamand Lake, Jagat, Rikhabdeo, Eklingji, Haldighati, etc. Dungarpur and Banswara (often termed as the Vagad circuit) are relatively underdeveloped tourist areas adjoining the Mewar circuit. Mewar region falls in the Aravalli range that encompasses lakes, beautiful hills and deep valleys. The climate in the region is pleasant for most part of the year except the summer



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months from April to June. The tourist activity is high during the months of September to March. The region being popular amongst domestic tourists, also receives tourists from the neighbouring states during vacation months in summer.

Vagad Circuit (Dungarpur-Banswara)

2.2.13 Vagad region comprises the southern tip of the Aravalli range and lies on the Rajasthan-Gujarat border. The region encompasses wild and rugged terrain in the northeast to alluvial soil in the southwest. The Vagad circuit offers a combination of tribal culture and history. Although a separate circuit by itself, Udaipur (Mewar Circuit) is most often the hub for this circuit. This circuit is relatively unexplored due to its proximity to the popularity of the adjoining the Mewar circuit. Other key tourist locations in this circuit are Baneshwar, Deo Somnath, Arthuna, Galiyakot and Mahi Dam. The climate in the region is pleasant for most part of the year except the summer months from April to June. The tourist activity is high during the months of September to March, peaking during the Baneshwar Fair in February.

Dhundhar Circuit (Jaipur-Dausa-Tonk)

2.2.14 The Dhundhar circuit is spread around Jaipur and is known for its rich blend of culture, history, architecture and religion. Besides Jaipur, it includes tourist locations such as Samode, Abhaneri, Tonk and Ramgarh. The Dhundhar circuit lies between the northern Aravalli range and close to the Sambhar Basin. The climate in the region is extremely hot during the peak summer months of April – June. As a result, the peak tourist season extends from September to March. Being the capital city and the main gateway into the state, Jaipur and the region also experiences some tourist arrivals during the vacation months.

Godwar Circuit (Mount Abu-Ranakpur)

2.2.15 The Godwar circuit has the only hill station in Rajasthan - Mount Abu. The beautiful temple town of Ranakpur is the other important attraction in the circuit. The former is very popular leisure destination with the tourist coming from Gujarat, whereas the latter is popular with both the domestic as well as foreign tourist. Although a part of the Aravalli range, Mount Abu is detached completely from it by a narrow valley and the highest point is situated at its northern end. As the only hill station in the state Mount Abu is a popular summer retreat, and the tourist season extends from February to June and in the vacation period from September to December. Located nearby are the famous Delwara Jain Temples, which are renowned all over the world for their exquisite stone carvings.

Merwara-Marwar Circuit (Ajmer-Pushkar Circuit)

2.2.16 The Merwara-Marwar Circuit is the heart of pilgrim activity in Rajasthan. Ajmer and Pushkar are the important pilgrim centres for tourists from all over India. Pushkar is internationally known for its annual camel fair held in November with a large number of foreign tourists visiting the fair every year. Other locations in the circuit, Merta and Nagaur are relatively less popular. The circuit falls in the Sambhar Plains. The tourist season is spread out evenly during the year although the tourist arrivals are very high during the annual Urs at Ajmer and the Pushkar Fair.

Brij Mewat Circuit (Alwar-Sariska-Bharatpur-Sawai Madhopur)

2.2.17 The Brij Mewat circuit is very popular with wildlife enthusiasts. The region also has a fair share of places of historic and archaeological importance. The circuit covers locations bordering Delhi, Uttar Pradesh and Madhya Pradesh and includes Alwar, Sariska,



Deeg, Bharatpur, Karauli and Sawai Madhopur. Although termed as a circuit these tourist locations are covered as daily excursions from Jaipur or enroute Jaipur from either Delhi or Agra. Sawai Madhopur is also covered as a standalone circuit by the domestic to tourist.

2.2.18 The tourist arrivals at these locations are the maximum during the winter months from October to February. The main attractions in the Brij Mewat circuit are the National Parks at Sariska, Bharatpur and Ranthambhor. The circuit (especially Sariska and Bharatpur) is also popular as a weekend tourist destination for visitors coming from Delhi and the National Capital Region.

Shekhawati Circuit (Sikar-Mandawa-Jhunjhunu)

2.2.19 The Shekhawati region in Rajasthan is known for its fresco-painted havelis built by the former rich merchants of the region. The Shekhawati region is popularly called the 'open art gallery' of Rajasthan. This region includes numerous small towns like Mandawa, Nawalgarh, Sikar, Jhunjhun, Fatehpur, Churu, Mukundgarh, Dundlod, Chirawa, etc. each having their share of such beautiful havelis. The circuit attracts primarily the foreign tourists arriving into the state. The tourist season extends from September to March.

Hadoti Circuit (Bundi-Kota-Jhalawar)

2.2.20 The Hadoti circuit is amongst the least explored regions of Rajasthan. This circuit includes the districts of Bundi, Kota and Jhalawar. Places of tourist interest in the adjoining Baran district are also covered as a part of this circuit. The tourist season in the region extends from September to March. The main attractions in the Hadoti circuit are the palaces at Kota and Bundi. The Hadoti circuit also has several places of religious interest, especially for domestic tourists arriving from Madhya Pradesh. Jhalawar is also well known for its annual fair.

2.2.21 The coverage of the above circuits by various independent tourists differs considerably. Similarly, group tourists cover these circuits in different ways. The most popular tours taken by various tourists are given in Exhibit 2.3. The nine identified circuits are covered in detail subsequently.

Exhibit 2.3

Popular Tours/ Circuits by Tourist Types

Circuit/ Destination	Popular Coverage Pattern	Popular among Tourist Category
Jaipur City	As standalone destination As a part of the Golden Triangle As an extension of other circuits being the state capital	Independent tourists Group Tourists Independent/ Group Tourists
Desert circuit (Jodhpur-Jaisalmer-Barmer-Bikaner)		Group Tourists (Mainly foreign)
Jodhpur -Jaisalmer: Popular leg	Also covered independently	Group/ Independent (Foreign) Tourists
Bikaner-Barmer: Less popular	Barmer is at times not covered at all	Group Tourists
Mewar circuit (Udaipur-Chittaurgarh-Rajsamand)		Group Tourists
Udaipur City	As standalone destination	Group/ Independent

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Circuit/ Destination	Popular Coverage Pattern	Popular among Tourist Category
Udaipur-Chittaurgarh	Also done independently	(Domestic) Tourists Group (Domestic)/ Independent (Domestic) Tourist
Udaipur-Nathdwara-Rajsamand Nathdwara	As a part of the PoW Day excursion from Udaipur Also covered standalone as pilgrim destination	Group (Foreign) Tourist Group/ Independent Domestic Tourist, particularly from Gujarat
Udaipur-Kumbhalgarh-Ranakpur	Day excursion from Udaipur	Group/ Independent Domestic Tourist
Vagad circuit (Dungarpur- Banswara)		
Dungarpur	Day excursion from Udaipur/ Approached from Gujarat enroute Udaipur	Group/ Independent Domestic Tourist
Banswara	Day excursion from Udaipur/ Approached from Ratlam (Madhya Pradesh)	Group/ Independent Domestic Tourist
Godwar circuit (Mount Abu- Ranakpur)		
	Popularly approached from Gujarat Also approached from Udaipur	Group/ Independent Domestic Tourist Group/ Independent Domestic Tourist
Brij-Mewat circuit (Alwar- Sariska-Deeg-Bharatpur- Dholpur-Karauli-Sawai Madhopur)		
Keoladeo NP, Bharatpur	Covered standalone or as an extension of the Golden Triangle	Group/ Independent (Foreign) Tourists
Sariska Palace and NP	Covered standalone	Group (Foreign)/ Independent (Domestic) Tourists
Ranthambhor NP	Covered standalone	Group (Foreign)/ Independent (Domestic) Tourists

Tourist Traffic Trends

2.2.22 Rajasthan received around 0.61 Mn of the 2.62 Mn foreign tourists who visited India in 2001. Additionally, the state also recorded over 7.75 Mn domestic tourist in the same year. The popular Golden Triangle circuit (Delhi-Agra-Jaipur) has put Jaipur on the world tourism map with the city receiving the highest number of foreign tourists visiting the state.

2.2.23 Exhibit 2.4 gives the growth trends in tourist arrivals at various locations in Rajasthan during the last five years.

Exhibit 2.4

Past Growth Trends in Tourist Arrivals

Circuit	Location	Tourists	1997	1998	1999	2000	2001
Desert Circuit	Jodhpur	Indian	427549	364870	352707	370933	383479
		Foreign	49221	49007	47807	67845	69812
		Total	476770	413877	400514	438778	453291



Circuit	Location	Tourists	1997	1998	1999	2000	2001
Mewar Circuit	Jaisalmer	Indian	69184	52889	35157	58578	103319
		Foreign	57166	52299	50283	50732	46914
		Total	126350	105188	85440	109310	150233
	Bikaner	Indian	196168	205976	225678	182477	185645
		Foreign	25479	26752	22215	28441	31441
		Total	221647	232728	247893	210918	217086
	Udaipur	Indian	638987	575088	578622	735333	662826
		Foreign	84284	78267	78708	77174	56760
		Total	723271	653355	657330	812507	719586
	Nathdwara	Indian	281161	326749	464136	462837	319159
		Foreign		37	166	300	562
		Total	281161	326786	464302	463137	319721
Chittorgarh	Indian	240872	327874	150108	120145	120390	
	Foreign	13357	10453	5886	8164	7552	
	Total	254229	338327	155994	128309	127942	
Rikhabdeo	Indian	8754	10629	16021	36893	8200	
	Foreign	25	28	52	22	60	
	Total	8779	10657	16073	36915	8260	
Vagad Circuit	Banswara	Indian	76200	96137	111872	109053	115101
		Foreign	256	306	338	263	273
		Total	76456	96443	112210	109316	115374
Jaipur / Dhundhar Circuit	Jaipur	Indian	700358	616315	613511	745476	655715
		Foreign	141112	150971	142955	154756	172950
		Total	884470	767286	743466	900232	828665
Mohit Abu - Ranakpur (Godwar Circuit)	Mount Abu	Indian	1391832	1056113	1328431	1254770	1282940
		Foreign	15818	14259	13413	14427	13752
		Total	1407650	1070372	1341844	1269197	1296692
	Ranakpur	Indian	55320	55756	55520	56949	61535
		Foreign	301	23976	21676	23816	24144
		Total	55621	79732	77196	80765	85679
Ajmer-Rushkar (Merwara-Marwar Circuit)	Ajmer	Indian	493596	783782	766497	1088000	1269309
		Foreign	60066	48808	45202	51344	54040
		Total	553662	832590	811699	1139344	1323349
	Pushkar	Indian	700515	679303	731124	951000	865000
		Foreign	50198	38150	49279	52011	46182
		Total	750713	717453	780403	1003011	911182
Brij-Mewat Circuit	Bharatpur	Indian	118310	112394	104247	118079	101181
		Foreign	16265	14638	10626	11262	9553
		Total	134575	127032	114873	129341	110734
	S. Madhopur	Indian	77238	84961	62080	89391	50598
		Foreign	4704	8602	6750	8869	10064
		Total	81942	93563	68830	98260	60662



2001	Circuit	Location	Tourists	1997	1998	1999	2000	2001	
8	103319	Alwar	Indian	50747	47360	53958	76934	100995	
2	46914		Foreign	1837	12465	7934	8235	3334	
0	150233		Total	52584	59825	61892	85169	104329	
7	185643	Sariska	Indian	5864	10706	11949	15559	11817	
1	31441		Foreign	1280	8825	9551	10854	12351	
8	217086		Total	7144	19031	21500	26413	24168	
3	662826	Sisnerb	Indian	1780	3956	1981	2036	1843	
4	56760		Foreign	394	404	254	206	120	
7	719586		Total	2174	4360	2235	2242	1963	
7	319159	Behror	Indian	10004	8189	6417	5754	3799	
0	562		Foreign	80	84	49	66	36	
7	319721		Total	10084	8273	6466	5820	3835	
5	120390	Shekhawati Circuit	Jhunjunun	Indian	63085	66205	61027	68192	76446
4	7552		Foreign	26641	30233	25346	28818	33751	
9	127942		Total	89726	96438	86373	97010	110197	
3	8200		Sikar	Indian	14912	7952	5952	8136	6382
2	60		Foreign	803	574	337	527	295	
5	8260		Total	15715	8526	6289	8663	6677	
3	115101	Hadoti Circuit	Kota	Indian	102162	83212	53017	53874	62438
3	273		Foreign	2156	1834	1523	1775	1991	
5	115374		Total	104318	85046	54540	55649	64429	
5	655715		Bundi	Indian	2661	11333	29293	30433	20911
5	172950		Foreign	1431	3818	10342	10568	4334	
2	828663		Total	4092	15151	39635	41001	25245	
3	1282940		Jhalawar	Indian	183812	124615	128703	189694	174262
7	13752		Foreign	95	47	41	82	72	
7	1296692		Total	183907	124662	128744	189776	174334	
9	61535	Others	Indian	379044	690946	717520	543865	1113927	
5	24144		Foreign	9091	17032	24952	12543	7940	
5	85679		Total	388135	707978	742472	556408	1121867	
3	1269309	Grand Total	Indian	6290115	6403310	6675528	7374391	7757217	
1	54040		Foreign	605060	591369	562685	623100	608283	
1	1323349		Total	6895175	6994679	7238213	7997491	8365500	

Source: DoT Statistics, Government of Rajasthan

2.2.24 The main tourist traffic trends in Rajasthan over the past 5 years are as follows:

- **Slow Growth in tourism in the main tourist locations:** The main tourist cities of Rajasthan namely, Jaipur, Udaipur, Jodhpur, Jaisalmer, Bikaner and Mount Abu have seen marginal growth (and occasionally a marginal decline) in total tourist traffic and all these locations (barring a few exceptions) have seen tourist traffic levels in 2001 largely unchanged from 5 years ago (1997)
- **Select Tourist locations are experiencing high growth:** In particular, the Ajmer-Pushkar circuit is experiencing high growth in domestic tourists – whilst foreign



tourist traffic at these locations is more or less static, domestic tourist traffic has increased significantly particularly at Ajmer

Also, the Alwar-Sariska belt is experiencing strong growth. Growth in domestic tourism is largely due to its increasing popularity as a weekend gateway from Delhi (as well as a 'conference tourism' venue) while growth in foreign tourist traffic is led by the growing popularity of the Sariska WLS amongst foreigners who visits Jaipur and / or cover the Golden Triangle circuit

Amongst the smaller tourist destinations, Bundi is particularly (part of the Hadoti circuit) has seen a multi-fold increase in both domestic and foreign traffic

Banswara (also Dungarpur) is slowly emerging on the tourist map though it should be noted that taking Banswara as an example traffic is led by the annual religious festivals / fairs

- The tourism experience sought from Rajasthan is changing:** Traditionally the Rajasthan tourism experience offered palaces, forts, lakes and the desert. However, based on the 5-year trend in tourist traffic, the experience sought from Rajasthan is changing. The traditional tourism experience is no doubt desired but the focus is gradually shifting to more varied tourism products particularly:
 - ✦ Eco-tourism / wild life tourism (particularly the Sanctuaries)
 - ✦ Weekend tourism / conference tourism (particularly in Northern Rajasthan given its proximity to Delhi and NCR)
 - ✦ Value-added desert tourism (including adventure tourism, desert safaris, desert sports, etc.)
 - ✦ Newer (less 'touristy') destinations offering the same traditional experience (e.g. Bundi, distant heritage hotels, etc.)
- Domestic tourists are gradually becoming more important than foreign tourists:** More so since in the last few years (and particularly in 2001) foreign tourists have been static while domestic tourists have grown.

2.2.25 Tourism activity in Rajasthan has shown a direct correlation with the socio-political stability in the country and the state. Political uncertainty, social unrest and such events have affected the tourist activity adversely in the past. Although, the foreign tourist numbers have remained stable over the years, they have failed to achieve their growth potential.

Existing Direct Tourism Infrastructure

2.2.26 Success of tourism in Rajasthan hinges critically upon the adequacy and quality of tourism related infrastructure (and the tourist facilities and services) that are available to the tourist. Tourism relevant infrastructure specifically includes the following:

- Transport and Connectivity Infrastructure (by Air/ Rail/ Road both in terms of transport terminals, connectivity and transport services)
- Direct Tourism Infrastructure in terms of :
 - a) Accommodation (Private/ Government)
 - b) Tourist Offices and Information Centres
 - c) Midway and Wayside Facilities

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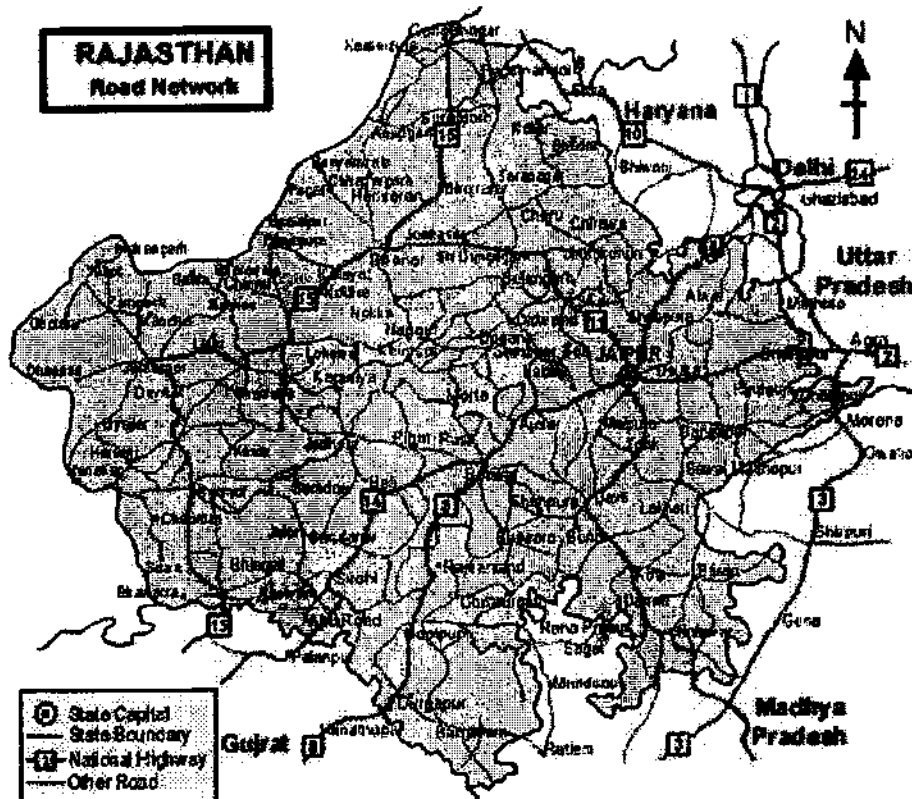
- d) Others (Shopping facilities, Restaurants, etc.)
- Sanctuaries and Monuments

Transport Infrastructure in Rajasthan

Road network

2.2.27 The state has a well-developed network of roads that facilitate access to the main tourist hubs from within and outside the state and ease movement within the circuits. Hubs such as Jaipur, Jodhpur and Udaipur are connected to other tourist places in the state through a well-developed network of roads. The road connectivity in the state is depicted in the Exhibit 2.5.

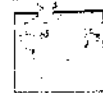
Exhibit 2.5
Road Connectivity in Rajasthan



2.2.28 There are regular RSRTC services connecting various locations in the state with each other. Besides these, there are many private services connecting major tourist cities and attractions within.

Railways

2.2.29 The rail network in Rajasthan mainly falls under the Western and Northern Railway zones. A small section of track also falls under the Central Railway zone. The total length of railway routes in the state is around 5,920 Kms. Out of the total length, 3,028 Kms is covered under broad gauge, 2,803 Kms under meter gauge and 89 Kms under narrow gauge and a small stretch of 491 Kms on the Western Railway (between Gangdhar and Bharatpur) is electrified.

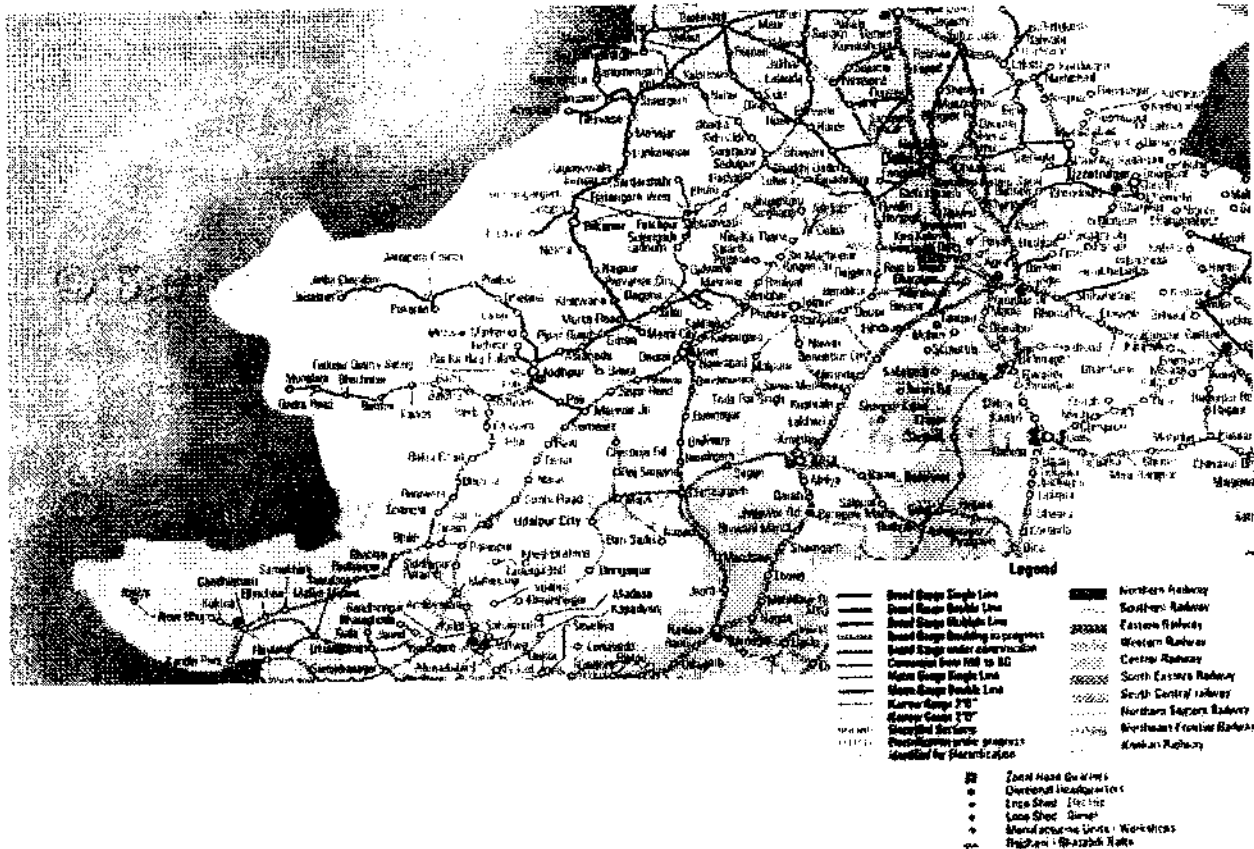


2.2.30 Jodhpur, Jaipur, Ajmer, Bikaner, Kota, Sawai Madhopur, Chittaurgarh, Merta Road and Bharatpur are the major rail junctions in Rajasthan with broad gauge connectivity with the rest of the country. Udaipur is also an important railway terminal though at present it is on the metre gauge network.

2.2.31 The rail connectivity map of Rajasthan is provided in Exhibit 2.6.

Exhibit 2.6

Railway Connectivity Map of Rajasthan



2.2.32 There are regular train services between major tourist cities within the state as well as with important cities in the country.

Air Links

2.2.33 Although Rajasthan has 19 airstrips and 128 helipads, regular commercial air services are operational only at Jaipur, Jodhpur and Udaipur. Kota and Jaisalmer do not have regular commercial flight services inspite of having adequate landing and take off facilities. Flights to Jaisalmer have been discontinued recently given its sensitive location bordering Pakistan.

2.2.34 Airports at Jaipur and Udaipur are managed by the Airports Authority of India (AAI) whereas the airstrips at Jodhpur and Jaisalmer are under the control of Indian Air Force (IAF).



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2.2.35 Air services connect the state only to Mumbai and Delhi. Indian Airlines, Jet Airways and Alliance Air operate regular flights to Udaipur, Jodhpur and Jaipur, ex-Mumbai/Delhi.

Accommodation

Hotels (including Heritage Hotels)

2.2.36 Rajasthan offers the tourist a vast range of accommodation options to suit his budget as well as his preferences. It is estimated that the total number of hotels in the State is around 1,450 with a bed capacity of approx. 55,000-60,000. More than 75% of these hotels are located in the major tourist hubs such as Jaipur (~300 hotels), Udaipur (~130 hotels), Mount Abu (~130 hotels), Jodhpur (~90 hotels), Ajmer (~70 hotels), Jaisalmer (~50 hotels), etc.

2.2.37 The hotels in Rajasthan are largely managed by the private sector primarily by local entrepreneurs or local/ regional hotels/ groups. Domestic and international hotel chains are also present in the state and offer accommodation primarily in the luxury category. Domestic hotel chains like The Taj Group (Indian Hotels Co. Ltd.), The Oberoi Group (East India Hotels Ltd.), WelcomHeritage Hotels (ITC Hotels), HRH Group who own/ manage several star hotels in the state. Similarly, international chains like Holiday Inn, Accor, Radisson, Quality Inn also have a presence in the state through franchisee arrangements.

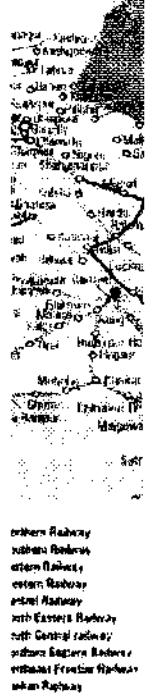
2.2.38 Rajasthan has been a pioneer state in launching heritage hotels in the country by converting old palaces and havelis of erstwhile rulers into tourist accommodations. These heritage hotels have become extremely popular with tourists, especially the foreign tourists. At present there are 43 DoT recognised heritage hotels in Rajasthan with a room capacity of 2330 rooms. Apart from these, there are 53 other heritage hotels (with an approx. capacity of 1800 rooms) that are not recognised by the DoT.

RTDC Hotel Accommodation

2.2.39 RTDC today owns/ manages 61 properties consisting of 36 hotels and 15 motels. In its initiative to privatise its assets, RTDC has leased out some of its properties to private houses. A total of 2102 bed capacity is available with RTDC across its four categories of hotels, namely, Elite, Classic, Standard and Economy. Within these, RTDC offers suites, AC rooms, cool rooms, huts, ordinary rooms and dormitories to the tourists. Accommodation at RTDC hotels is available at reasonable tariffs (ranging from Rs. 50 for dormitories at Economy hotels to Rs. 1900 for suites at Elite Hotels). The main/flagship RTDC properties in the state are Hotel Gangaur (126 beds), Hotel Swagatam (100 beds) and Hotel Teej (109 beds) in Jaipur, Hotel Moomal (130 beds) in Jaisalmer, Hotel Ghoomar (156 beds) in Jodhpur, Hotel Shikhar (164 beds) in Mt. Abu, Hotel Kajri (141 beds) in Udaipur

Paying Guest Accommodation

2.2.40 A major part of the tourism experience for a tourist is experiencing local life at a particular place. Recognising this, the Rajasthan Government, as part of its tourism activities, has pioneered a Paying Guest Scheme, wherein the tourists can stay as paying guests in a family atmosphere. This scheme is presently in operation in 12 cities in Rajasthan (Ajmer, Alwar, Bharatpur, Bikaner, Bundi, Chittaurgarh, Jaipur, Jaisalmer, Jodhpur, Kota, Mount Abu and Udaipur) and the estimated number facilities across the state is approx. 450 units with a total capacity of approx. 2700 beds.



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Tents

2.2.41 Temporary tented accommodations are also available particularly during specific events such as fairs and festivals, when there is a large influx of tourists. Presently such tented accommodation is available in Pushkar, Jaisalmer and Nagaur during their fairs and festivals and is very popular with all the tourists.

2.2.42 Tents are provided by RTDC as well as other hotel chains like the Taj, Oberoi and WelcomHeritage. For example, during the annual Pushkar Festival, RTDC sets up a temporary tourist village consisting of huts (32), Swiss tents (150), standard tents (50) and dormitories (25). The village also has a coffee shop and a dining hall, which can cater to 1500 guests at a time. In addition to this, private hotels also put up over 500 tents during the same period.

Dharamshalas/ Dormitories

2.2.43 Several religious trusts across the state run dharamshalas/ dormitories that provide basic accommodation largely to the pilgrim tourists. Such accommodations supplement regular accommodation at pilgrim places like Ranakpur, Nathdwara, Ajmer, Pushkar, etc. and also at other cities such as Jaipur, Udaipur, Jodhpur, etc.

2.2.44 The estimated bed capacity of these dharamshalas would be close to 8,000 by and large in dormitory style accommodation. This capacity is however flexible and can be stretched to accommodate a large mass of pilgrims arriving during various fairs and festivals.

Tourist Offices and Information Centres

2.2.45 Another critical tourist infrastructure is tourist information centres in a place. These centres are designed to help the tourist get the best tourism experience in any location.

2.2.46 DoT, Rajasthan operates Tourist Reception Centres (TRCs) and Tourist Information Bureaus (TIBs) at various places across the state. The primary aim of these offices is to provide the arriving tourist with essential information related to accommodation, travel and sight seeing, shopping and events. Presently, there are 11 TRCs and 29 TIBs at different tourist locations in the state. Also, there are two regional tourist offices in Jodhpur and Udaipur and smaller TRCs in Delhi, Kolkata, Mumbai, Ahmedabad and Chennai. Apart from offering tourist information, the TRCs also provide services such as arranging for bookings at RTDC and other private hotels in Rajasthan, information on other details like package tours, fairs and festivals, paying guest accommodation, etc.

Midways and Wayside facilities

2.2.47 Rajasthan has a huge geographical area spanning more than 800 Kms from East to West and North to South. Since the air network and rail connectivity is limited in terms of its reach to smaller locations, there is a greater use of road for intercity travel as well as day-trips/ excursions from the major tourist destinations. This necessitates creation of suitable midway/ wayside infrastructure to provide enroute/ wayside amenities at appropriate places so that traveling tourists can relax and refresh.

2.2.48 To overcome these deficiencies, RTDC has provided mid-ways at various places on the popular tourist routes. Presently, there are 21 such RTDC midway/ wayside facilities. Besides these, there are also private midway facilities offered on most busy tourist routes.



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Sanctuaries/ Parks

2.2.49 The forests of Rajasthan cover an approx. 9.3% of the total geographical area of the state. These forests are spread unequally in northern, southern, eastern and southeastern parts of the state. Rajasthan has 4 National Parks and 25 Wildlife Sanctuaries identified by the State Forest Department. The total area of National parks / Sanctuaries is 9,161.21 sq. km., which is roughly 2.8% of the geographic area of the state or 30.2% of the forest areas in the state.

2.2.50 Although the state has over 25 sanctuaries/ parks, only the National Parks at Bharatpur, Ranthambhor and Sariska are amongst the popular tourist attractions in the state. The total tourist arrival at these places in 1999 was close to 2.2 lakh tourists, which includes a large number of foreign tourists. Other protected areas in the state are relatively less popular with only around 32,000 tourist arrivals cumulatively. Development and promotion of these sanctuaries on a selective basis thus offers Rajasthan the opportunity to enhance the its tourism experience in the state.

Monuments

2.2.51 Rajasthan is richly endowed with historical, religious, cultural and nature sites. It houses old monuments such as forts, palaces, havelis, memorials, cenotaphs, towers, statues, etc. of various centuries. These historical monuments are currently under various agencies such as the State Government, Archaeological Survey of India and Archaeology and Museums Department. A large number of monuments such as palaces, havelis and others are still owned by the erstwhile rulers and the private trusts set-up by them.

Recreational Facilities

2.2.52 Recreational facilities include resorts, amusement parks, boating facilities, camping facilities, health rejuvenation, etc. Although Rajasthan has a vast inventory of natural and cultural attractions, it traditionally had relatively few recreational facilities to offer to the tourist. However, this is changing and a beginning has already been made with recreational facilities and products such as boating, camping, hiking, horse safaris, etc., being started by private entrepreneurs at various tourist places.

Cultural Complexes

2.2.53 Rajasthan is rich in its cultural diversity with each region in the state having its own identity in terms of traditions and customs, lifestyle, art, music and dances, attire and cuisine. The visiting tourist can experience this diversity while traveling in the state and also through various museums and fairs and festivals. However, there is a need to make this diversity reach the tourist 'at one place' whereby he can understand, appreciate and have a participative cultural experience.

2.2.54 Presently, this integrated promotion of the cultural diversity to the tourist is done through initiatives such as Shilpgram (Udaipur) run by Western Zone Cultural Complex and Bhartiya Lok Kala Museum (Udaipur). Choki Dhani (Jaipur), started by a private entrepreneur is also an example of a cultural complex operating on a commercial format.

Shopping Facilities

2.2.55 Shopping is another complementary activity that contributes to the overall attractiveness of a tourism destination. Rajasthan's cultural heritage translates itself into various



art-form expressed through textiles, wood-carvings, paintings, stone-carvings, gemstones and jewelry, leather products, etc. As such, Rajasthan has a lot to offer to the tourist in terms of range of goods available. However, the local industries are scattered across the state and have a very fragmented and small scale dominated retail base.

2.2.56 There are exceptions, however, in the form of a few organised setups like Rajasthali (Government of Rajasthan undertaking), Cottage Industries Emporium (Private), Central Cottage Industries Emporium (Private) who have a network of retail outlets in major tourist cities in the state. Besides these there are Government approved souvenir shops in all major tourist cities and towns though they are out-numbered by small, unorganised set-ups.

2.3 TOURIST FORECAST FOR RAJASTHAN

2.3.1 Based on the locationwise/ circuitwise evaluation and assessment of potential for future tourism growth, the forecast for tourist arrivals in the state over the perspective plan period is as follows:

Exhibit 2.7

Forecast of Tourist Arrivals at the Important Locations in Rajasthan

Circuit	Location	Tourist Category	Actual 2001	Forecast of Tourist Arrivals (Nos.)		
				2006	2011	2021
Desert	Jodhpur	Domestic	383479	393536	434495	583925
		Foreign	69812	89247	113904	145789
		Total	453291	482782	548399	729714
	Jaisalmer	Domestic	503319	87752	106764	136650
		Foreign	46914	73477	107962	159737
		Total	150233	161229	214726	296387
	Bikaner	Domestic	185645	216642	239190	264215
		Foreign	31441	44729	62735	92820
		Total	217086	261371	301925	357034
Mewar	Udaipur	Domestic	662826	685293	720250	795604
		Foreign	56760	90994	110708	148712
		Total	719586	776287	830957	944316
	Nathdwara	Domestic	319159	491301	597743	693621
		Foreign	562	390	474	637
		Total	319721	491691	598217	694258
	Chittaurgarh	Domestic	120390	170227	178910	197628
		Foreign	7552	10409	12664	17012
		Total	127942	180636	191574	214640
	Rishabdeo	Domestic	8200	22688	27603	32031
		Foreign	60	48	53	65
		Total	8260	22736	27656	32096

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Circuit	Allocation	Tourist Category	Actual 2001	Forecast of Tourist Arrivals (Nos.)		
				2006	2011	2021
Varanasi	Banswara	Domestic	115101	124154	192911	285423
		Foreign	273	332	367	447
		Total	115374	144487	193278	285871
Dhundhar	Jaipur	Domestic	655715	775477	856189	945766
		Foreign	172950	200776	232754	297909
		Total	828665	976253	1088943	1243675
Godwar	Mount Abu	Domestic	1282940	1395053	1540251	1701395
		Foreign	13752	19733	24009	30729
		Total	1296692	1414786	1564259	1732124
	Ranakpur	Domestic	61535	63953	70609	77997
		Foreign	24144	30787	37458	47943
		Total	85679	94740	108067	125940
Merwara - Marwar	Ajmer	Domestic	1269309	1343507	1714693	2303318
		Foreign	54040	68594	87546	117598
		Total	1323349	1412101	1802238	2420916
	Pushkar	Domestic	865000	1157712	1477567	1891185
		Foreign	46182	63636	81218	109098
		Total	911182	1221348	1558784	2000284
Raj - Mewar	Bharatpur	Domestic	101181	120276	146334	216610
		Foreign	9553	13808	19366	31531
		Total	110734	134083	165699	248140
	S. Madhopur	Domestic	50598	80682	98162	125641
		Foreign	10064	15033	22089	32682
		Total	60662	95715	120251	158322
	Alwar	Domestic	100995	109715	140027	207274
		Foreign	3334	8524	10879	17720
		Total	104329	118239	150906	224995
	Sariska	Domestic	11817	24732	39831	64881
		Foreign	12351	30874	62100	111013
		Total	24168	55607	101931	175894
	Siliserh	Domestic	1843	2429	3099	4165
		Foreign	120	237	262	319
		Total	1963	2666	3362	4485
	Behror	Domestic	3799	8585	10957	14024
		Foreign	36	171	275	469
		Total	3835	8756	11232	14493



Circuit	Location	Tourist Category	Actual	Forecast of Tourist Arrivals (Nos.)		
			2001	2006	2011	2021
Shekhawati	Jhunjunun	Domestic	76446	101244	129216	165387
		Foreign	33751	90977	146520	250024
		Total	110197	192221	275736	415412
	Sikar	Domestic	6382	11081	14143	18102
		Foreign	295	1332	2145	3659
		Total	6677	12413	16287	21761
Hadoti	Kota	Domestic	62438	128100	206306	305242
		Foreign	1991	4553	8024	15048
		Total	64429	132653	214330	320290
	Bundi	Domestic	20911	56318	113275	232833
		Foreign	4334	17258	30415	57036
		Total	25245	73576	143690	289869
	Jhalawar	Domestic	174262	262968	386386	571682
		Foreign	72	166	292	548
		Total	174334	263134	386679	572230
Others	Others	Domestic	1113927	1040122	1528280	4337669
		Foreign	7940	18546	27251	96595
		Total	1121867	1058668	1555531	4434265
Total	Total	Domestic	7757217	6893545	10973192	16172269
		Foreign	608283	894632	1201467	1785142
		Total	8365500	7788177	12174658	17957411

2.3.2 The tourist arrivals at each of the eight regions studied is expected to grow at a higher rate in the first and second phase (2002-2006) and plateau out in the latter years. These growth rates are based on various factors such as basic tourism potential of a region, current and required infrastructure levels and scope for development of new products in the future. The tourism infrastructure required to tap the full tourism potential of a place in terms of existing attractions and new tourism products is identified and the growth rates are based on provision of this infrastructure as per the phasing given.

2.3.3 It is expected that Ajmer, Pushkar, Mount Abu, Udaipur and Jaipur would continue to be the important locations for tourism in Rajasthan inspite of constraints on their carrying capacity. In the later part of the forecast period (in the long term), other relatively unexplored locations are expected to gain importance and grow sharply.

2.3.4 The prime focus therefore should be on augmenting the tourism infrastructure at the presently popular destinations to meet the short and medium term growth. At the same time, new tourism products and infrastructure should be created at the lesser-known destinations so that they attract some share of tourists from the already saturated places.



**2.4 SUMMARY OF ONGOING PROJECTS**

2.4.1 There are a number of ongoing/ proposed direct tourism infrastructure projects in Rajasthan planned by the State Government to be implemented over the next five years as summarised below:

Exhibit 2.8**Rajasthan State Plan and CSS Tourism Projects (Ongoing/ Proposed)**

Sr. No	Category	Total Investment (Rs. Lakhs)	Executing Agency
1	Site Enhancement (Major Projects above Rs. 50 Lakhs each)	2048.0	Various
2	Midways, Tourist Offices, Website Upgradation	247.5	RTDC
3	Shilpgram	86.0	RTDC, Collector
4	Food Craft Institute	265.5	RSBCC
5	Others	1104.0	Various
	Total	3751.0	
6	Roads*	5382.0	PWD
	Total	9133.0	

Note: As regards road projects, Rajasthan is somewhat unique in the sense that most of the major tourist destinations are on major National Highways like NH8, NH11, NH15, NH14, NH12, which are already well-developed or on major State Highways. Consequently, road infrastructure upgradation relevant to tourism is for the connecting/ 'last mile' connectivity to tourist sites, which are assumed to be developed in the short term

2.4.2 Most of these projects relate to bridging the existing 'gaps' at various tourist locations and also aimed at tourist site enhancement. In addition to above there are also a few large tourism related projects as indicated below:

- Jaipur International Airport Project:** The Jaipur airport is being upgraded to an International airport. It has been proposed to take up the extension of runway from 7500 ft. to 9000 ft. and construction of new control tower and parking bays. The airport upgradation project is being implemented through the efforts of RTDC supported by AAI. The project is estimated to cost approx. Rs. 77 Cr.
- Jal Mahal Tourism Infrastructure Project (JTIP):** The JTIP proposes to refurbish the Jal Mahal Palace and develop infrastructure in the near vicinity. This includes refurbishing Jal Mahal, developing boating, building tourist cottages and clubs, developing heritage village and crafts market, etc. It is estimated to cost approx. Rs.70 Cr. and is being developed with active participation from the private sector.
- Mewar Complex Project:** Places connected with the life of Maharana Pratap are being developed as tourist locations under the Mewar Complex project. These places include Kumbhalgarh, Chittaurgarh, Haldighati, Gogunda and Chawand. The project envisages creation of basic tourism infrastructure, beautification and creation of interpretation facilities at these places.
- Jaipur Film City Project:** The state government is planning to develop a film city near Jaipur at Jamdoli for which it has acquired 1,000 acres of land. The government has chalked out incentives to attract Mumbai film industry producers and investors to set up studios and multiplex cinema theatres. This initiative is expected to attract more domestic tourists to the city.



- Various Hotel Projects across the State:** The private sector on its part is instrumental in creating infrastructure like hotels and resorts in the state. Some of the large hotel projects proposed in the state are Vision Hotels and Resorts (Leela Group), Marwar Hotels (Accor Group), EIH Ltd. (Oberoi Group), Royale Manor Hotels and Industries Ltd., in Udaipur, Suman Motels, Bharat Hotels and Jaypee Hotels (Jaiprakash Group) in Jaipur, Suman Motels, Marwar Hotels (Accor Group) in Jaisalmer and Royale Manor Hotels and Industries Ltd. in Jodhpur

New Projects: Investment and Phasing

2.4.3 Based on the above analysis, the key project areas, total investment required in these and their phasing is summarised in Exhibit 2.9. For the purpose of phasing of the projects, three time periods have been considered as follows:

- Short term (2002-06), i.e. 5 years
- Medium term (2006-11), i.e. next 5-10 years
- Long term (2011-21), i.e. beyond 10 years

2.4.4 While providing the overall cost estimates and phasing of investment for the proposed projects, the likely parties responsible for funding and implementation of the projects have also been identified.

Exhibit 2.9

Summary of Investment and Phasing of Tourism Projects

Sr. No	Category	Total Investment (Rs. Lakhs)	Phasing		
			Short term	Medium Term	Long Term
1	Connectivity Infrastructure	17782	7882	3750	6100
	• Airports/ helipads	12350	2500	3750	6100
	• Link Roads/ Approach roads	5382	5382	0	0
2	Tourism Related Infrastructure	142008	59489	37619	44900
	• Hotels	125100	51760	31090	42260
	• Resorts/ Camping Sites	7772	2235	3572	1965
	Sub-total	132882	53995	34662	44225
	• Wayside Facilities	700	700	0	0
	• Tourist Offices	70	50	15	5
	• Tourist site enhancement	1792	690	732	370
	• Sanctuaries/ Eco-tourism	574	574	0	0
	• Tourism Products	5990	3480	2210	300
	Total	159740	67371	41369	51000

Note: The circuit-wise, location-wise details of individual projects are provided in the main report. Only a summary of the same is provided in this Executive Summary. It should be noted that these are new projects that have been identified and are in addition to the on-going projects (except for roads) summarised earlier.

2.4.5 As seen in the Exhibit, a total of around Rs. 1520 Cr. of investment is estimated to be required for these new/ additional projects over the next twenty years to develop direct tourism infrastructure in the state. A large part of this investment is expected to be in accommodation facilities followed by connectivity infrastructure and is detailed below.



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Accommodation

2.4.6 Accommodation facilities need to be added in line with the traffic growth in the state and at particular destinations. Presently there is an aggregate overcapacity in accommodation availability in the state. Current occupancy levels at most tourist locations in the state are in the range of 80-85%. However, at a micro level, there is a shortfall in specific categories of hotels at certain locations based on peaktime tourist arrivals. Based on the future trends in tourist arrivals and their stay patterns, it is estimated that there would be a shortfall of about 36,000 rooms in Rajasthan by 2021.

Exhibit 2.10

Hotel Projects: Investment and Phasing

Category	By 2006 (Short term)			2007-2011 (Medium term)			2012-2021 (Long term)			Total		
	No. of Hotels	No of Rooms	Invst. (Rs. Lakhs)	No. of Hotels	No of Rooms	Invst. (Rs. Lakhs)	No. of Hotels	No of Rooms	Invst. (Rs. Lakhs)	No. of hotels	No of Rooms	Invst. (Rs. Lakhs)
Luxury	8	800	17600	8	800	17600	11	1100	24200	27	2700	59400
Mid-priced	63	3150	25200	21	1050	8400	27	1350	10800	111	5550	44400
Economy	68	2040	6120	45	1350	4050	63	1890	5670	176	5280	15840
Others	284	2840	2840	104	1040	1040	159	1590	1590	547	5470	5470
Total	423	8830	51760	178	4240	31090	260	8930	42260	861	19000	125110

Note: (1) Refer Appendix 8B for the detailed calculations and assumptions

(2) Investment requirement is based on the following assumptions

- Luxury : 100 rooms @ Rs. 22 Lakh/ Room
- Mid-priced : 50 rooms @Rs. 8 Lakhs/ Room
- Economy : 30 rooms @ Rs. 3 Lakhs/ Room

2.4.7 In addition to the standard forms of accommodation facilities (hotels and paying guest), accommodation in form of resorts and camping sites have also been proposed in the perspective plan.

2.4.8 In case of connectivity infrastructure, construction and repairs of link and approach roads already identified by the DoT would be needed to be taken on priority.

Air

2.4.9 At present Jodhpur, Jaisalmer and Bikaner have airstrips under the control of the Indian Air Force (IAF) with the runway shared by the civilian aircrafts and IAF. Presently, regular flights are operational from Jodhpur only.

- Jodhpur:** The current runway can only handle smaller aircraft- AT7 (62 seater) operated by Jet Airways and 737-100/200 (~110 seater) operated by Alliance Air. However, with only 6 flights per day the airport capacity is sufficient to meet short / medium term needs. In long term, there is a need to upgrade the airport at Jodhpur to handle bigger aircraft (Boeing 737) with a scope for future expansion to Airbus A320, which can facilitate direct flight services to Jodhpur.
- Also, based on the future arrival forecast at the Jodhpur airport, a separate airport terminal is required in Jodhpur in the longer term.
- Bikaner:** A separate airstrip is recommended at Bikaner. There is an unused airstrip in Bikaner under the control of the state government. This could be upgraded to facilitate small and medium capacity aircrafts. At the same time,



domestic carriers should be asked to start flight services to Bikaner. This project could be undertaken over a long term.

- **Udaipur:** The current runway at Maharana Pratap Airport, Dabok can only handle smaller aircraft (737-200 and A37 type aircraft). There is a need to extend the runway to handle bigger aircraft over the medium/ long term.
- **Ajmer/ Pushkar:** An airstrip, which would handle small and medium capacity aircrafts, is recommended near Ajmer. A small terminal to handle tourist traffic is also proposed to be constructed. Domestic air taxi operators should be invited to start flight services to Ajmer from Delhi and Mumbai. On this front, AAI has recently commissioned a feasibility study for construction of a domestic airport at Ajmer. This project is expected to cost Rs. 2500 Lakhs and would be undertaken over the next 5 years.
- **Jaipur:** Jaipur Airport is being developed as an International Airport, by extending the runway from 7500 feet to 12000 feet (including building of culverts). Phase I envisages construction of RCC culverts and extension of runway from 7500 feet to 9000 ft while Phase II encompasses extension from 9000 feet to 12000 feet. Other works such as parking aprons, taxi track and international terminal building is also proposed to be carried out. The total cost of the proposed work is estimated to be Rs. 7700 Lakhs. Since the funds for the project have already been allocated and the project implementation work is already underway, it has not been excluded from this list.
- **Others:** Helipads to cater to tourist arrivals in Dungarpur, Kota and Mount Abu is proposed to be constructed in the medium term. The estimated cost of the three helipads with the associated passenger's terminals would be around Rs. 750 Lakhs.

2.4.10 A total of approx. Rs. 124 Cr. would be needed on additional infrastructure for air connectivity. Exhibit 2.11 provides the details of investment requirement and phasing for air connectivity projects in Rajasthan.

Exhibit 2.11

Air Connectivity Projects: Investment and Phasing

	By 2006 (Short term)		2011 (Medium term)		2016 (Long term)		Total	
	No. of projects	Invst (Rs. Lakhs)	No. projects	Invst (Rs. Lakhs)	No. of projects	Invst (Rs. Lakhs)	No. of projects	Invst. (Rs. Lakhs)
Airports / Airstrips /	1	2500.00	2	3000.00	2	6100.00	5	11600.00
Helipads	--	--	3	750.00	--	--	3	750.00
Total	1	2500.00	5	3750.00	2	6100.00	8	12350.00

Roads

2.4.11 The DoT has proposed works amounting to Rs. 5382.07 Lakhs for road development and repairs for tourist locations in the state. (This has been discussed earlier in Chapter 6 on a circuit-wise basis). Some of these projects are already underway. To ensure smooth flow of tourists and accessibility of the tourist attractions, it is recommended that the remaining works be carried out in the short term (within the next 5 years).

2.4.12 Similarly, other tourism infrastructure such as wayside facilities and tourist offices need to be provided on a priority basis at various locations. Tourist site enhancement and new tourism products should be phased out so as to optimise the destination life cycle.





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2.5 ROLE OF PRIVATE SECTOR AND PRIVATISATION

2.5.1 The development of tourism in Rajasthan in the future would be largely dependent upon partnership of government agencies (in core infrastructure) and private sector (in tourism assets and projects).

2.5.2 There is a need for the private sector to play a more contributory role in tourism development in the state. From owning and managing tourism-related direct infrastructure in the state, the private sector would now have to play active role in defining the overall direction of tourism in the state by:

- i) Ownership of tourist attractions and creation of tourism products
- ii) Promoting 'Brand Rajasthan'
- iii) Consultative and participatory role in Policy making
- iv) Seeking community support for tourism

State Government Initiatives for Development of Tourism Industry

2.5.3 Recognising the role of the private sector in the development of the tourism industry, the State Government has announced several initiatives and incentives to encourage and facilitate private sector participation. Some of these are outlined below:

- Acquisition of land for tourism development:** A Land Bank has been set up by DoT through its nodal agency, RTDC, to make available land belonging to various government departments (PWD, Forest and Revenue), local municipalities, corporations, UITs to the private investor for setting up tourism units.
- Identification of Nazool Properties for establishment of tourism units:** These are properties which are not protected by State Department of Archaeology and Museums (A&M) or Archaeological Survey of India (ASI) and which are owned by the State Government. Such properties would be transferred to DoT for developing into heritage hotels / museums / tourist complexes / tourist resorts in collaboration with private entrepreneurs under Disposal of Land and Properties by DoT/RTDC Rules, 1997.
- Simplification of rules and regulations for allotment and conversion of land for tourism infrastructure:** DoT, in consultation with the revenue and local self government departments is in the process of amending the relevant rules for conversion and allotment of land for setting up of tourism units in rural and urban areas.
- Identification of Special tourist areas for preservation of special characters of these areas:** DoT is initiating special efforts to preserve the unique identity of tourist destinations that have assumed heritage importance like Jaisalmer, Pushkar, Nathdwara, Mount Abu, etc. Accordingly, local authorities have been asked to pass special laws to ensure preservation of special character of these tourist towns.
- Preservation of historical and cultural heritage:** DoT is encouraging private initiative in preservation or monuments (forts, palaces, etc.) by offering these monuments for adoption. Efforts are being made to co-ordinate preservation, conservation and upkeep of the old buildings with all departments including ASI, A & M, Devasthan, Waqf Board, UIT's, municipalities, corporations, etc.



State Government Incentives to Tourism Units

2.5.4 To supplement its initiatives, the State Government has also extended various incentives for tourism industry in Rajasthan. Some of the important ones are mentioned below:

- Remission in stamp duty to the extent of 50% on transfer of deeds relating to land purchased in Municipal areas and to the extent of 100% relating to land purchased in Panchayat area
- Remission in Land and Building tax to the extent of 100% for hotels for the first five years if the hotel falls in a Municipal area
- Remission in Luxury tax to the extent of 50% for five years in Municipal areas and to the extent of 100% for five years in Panchayat areas
- Concession in Bar License fees for heritage hotels
- Increase in Luxury Tax slabs from Rs. 750 to Rs. 1000 and 50% rebate in Luxury Tax during off-season (April- July)
- Interest subsidy of 2% for tourism units on capital investment of Rs. 60 Lakhs and above with a condition that at least 50% of the unskilled workforce will be employed from local people
- DG sets subsidy at 25% of purchased value subject to maximum of Rs. 2.5 Lakhs for tourism units established in rural areas
- Entertainment tax exemption for films to the extent of 100% for a period of one year from the date of release if 75% of the film is picturised in Rajasthan
- Entertainment tax exemption to the extent 75% in first year, 50% in second year and 25% in third year for new Multiplexes and Drive-in Cinemas
- Allotment of Government land upto four bigas in rural areas at 25% of the reserved price of agricultural land subject to the condition that 100% unskilled workforce is employed from the local area

2.5.5 Apart from the above state incentives, tourism units in the state can also avail of various incentives and concessions offered by the Central Government from time to time.

Recent Efforts at Privatisation of RTDC Properties and Learnings

2.5.6 After tourism was accorded an industry status by the Government of Rajasthan in 1989, a private sector led tourism development was envisaged. Inline with this vision, the State Government has embarked on the path of privatisation of its current tourism assets. The main area in which privatisation has been successful is in accommodation, wherein the Department of Tourism has leased out 17 RTDC units (Hotels and Midways) to private parties on a short term two-year lease. Similarly, 21 more units are proposed to be leased out in the near future. Depending on the willingness of the private initiative to take up these properties and develop them further, the other properties will be similarly leased out.

2.5.7 Discussions with Government officials and private parties (individuals and corporates) on the privatisation focus of the Rajasthan Tourism Department revealed some of the practical problems and concerns encountered in the process and identified possible solutions.



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**Privatisation so far is perceived to be limited to unprofitable ventures and for short term only**

2.5.8 So far, the focus of privatisation is perceived to be limited to unprofitable ventures instead of offering a whole range of investment avenues for the interested parties. There is now a felt need that the profitable ventures in which private parties had evinced interest should be opened up for investment on a long term (10 years and above) basis so that the private investor is encouraged to invest in upgradation of these facilities.

Need for a clear roadmap for privatisation

2.5.9 There is a need for thorough planning in the entire process of privatisation. For example, in the case of Rajasthan the interested parties were not clear on various issues related to areas of investment, transfer of properties, time frames for investment, eligibility norms, etc. What the private sector desires is clearly identified privatisation projects that are bankable in nature and are available on a long-term basis, so that investment in these properties can take place.

Inadequate awareness about the Government's privatisation schemes

2.5.10 Past experience suggests that many interested parties were unaware of various assets available for investment. This was primarily due to marketing of related schemes to selective audience (NRIs, foreign conservationists, etc.). An active effort to conduct 'road shows' for marketing these privatisation projects across India is necessary, as this will increase the canvas of the investor profile.

No incentive to invest in currently non-profitable ventures

2.5.11 It is felt that some form of direct Government support is required especially in the privatisation of currently non-profitable ventures to a level wherein the private investor finds it attractive to come in. This has reduced the private sector confidence in such properties/projects although inherently they have development potential with such Government support.

2.6 OTHER NON-GOVERNMENT FUNDING OPTIONS

2.6.1 Private sector investment ably supported by Government investment in core infrastructure would be the two key sources for funding of tourism projects in the state. Apart from these, following sources for funding should also be looked at for tourism projects:

- Foreign Direct Investment
- Foreign funding from bilateral and multilateral agencies
- Others (NGOs, trusts, community participation, etc.)

2.6.2 Exhibit 2.12 summarises the funding options available for various tourism projects in Rajasthan.



Exhibit 2.12

Funding Options Available for Tourism Projects in Rajasthan

Sr. No.	Type of Project	Likely Investing / Funding Parties						
		Government agencies	Domestic Private sector	Foreign Investment	Foreign (Bilateral)	Foreign (Special donor agencies)	NGO	Community / Associations / Cooperative
1	Infrastructure development at pilgrim places	✓	✓				✓	✓
2	Hotels		✓	✓				
3	Paying Guest Facilities		✓					
4	Resorts (health, spas, water, jungle)		✓	✓				
5	Convention centres		✓	✓				
6	Restaurants and food services		✓	✓				
7	Amusement /Theme/ Water parks		✓	✓				
8	Ropeways		✓	✓	✓			
9	Palace on Wheels / River cruise	✓	✓					✓
10	Havelis on Wheels		✓					✓
11	Air services	✓	✓	✓	✓			✓
12	Special tourist trains (Heritage trains)	✓	✓			✓		✓
13	Safaris (Camel / Elephant / Horse)		✓				✓	✓
14	Tented camps		✓					✓
15	Conservation of Monuments	✓	✓	✓	✓	✓	✓	✓
16	Museum Development	✓	✓	✓	✓	✓	✓	✓
17	Golf Courses		✓	✓	✓			
18	Rural tourism		✓		✓		✓	✓
19	Ecotourism	✓	✓	✓	✓	✓	✓	✓
20	Adventure tourism		✓	✓	✓		✓	✓
21	Handicraft markets		✓				✓	✓
22	Cultural complexes / Shilpgrams		✓	✓			✓	✓
23	Hotel Management and Food Craft Institutes		✓					
24	Water supply and sewage schemes	✓	✓		✓			✓
25	Transport terminals	✓	✓					

2.6.3 At every stage, there would be need for the State Government (DoT) to stimulate private investment by creating a favorable atmosphere for investment with specific tourism-related fiscal, financial and other incentives. The State Government already has a number of incentive schemes for investment in different types of tourism related projects, as indicated earlier and these incentives appear adequate in the current context. The key now is to actively 'market' the state as an attractive destination for investment in tourism industry. Additionally, depending upon the importance of the project, the DoT could also extent special concessions to the investors on a case-to-case basis depending on the state and socio-economical impact of the project.



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2.7 INSTITUTIONAL FRAMEWORK FOR TOURISM DEVELOPMENT

2.7.1 There are agencies at three levels engaged in activities related to tourism development and promotion as indicated in Exhibit 2.13. The primary agencies involved directly in development and promotion of tourism are Department of Tourism, Art and Culture (DoT), Rajasthan and RTDC and RSHCL (DoT undertakings) and RITTMAN (Autonomous body)

Department of Tourism (DoT)

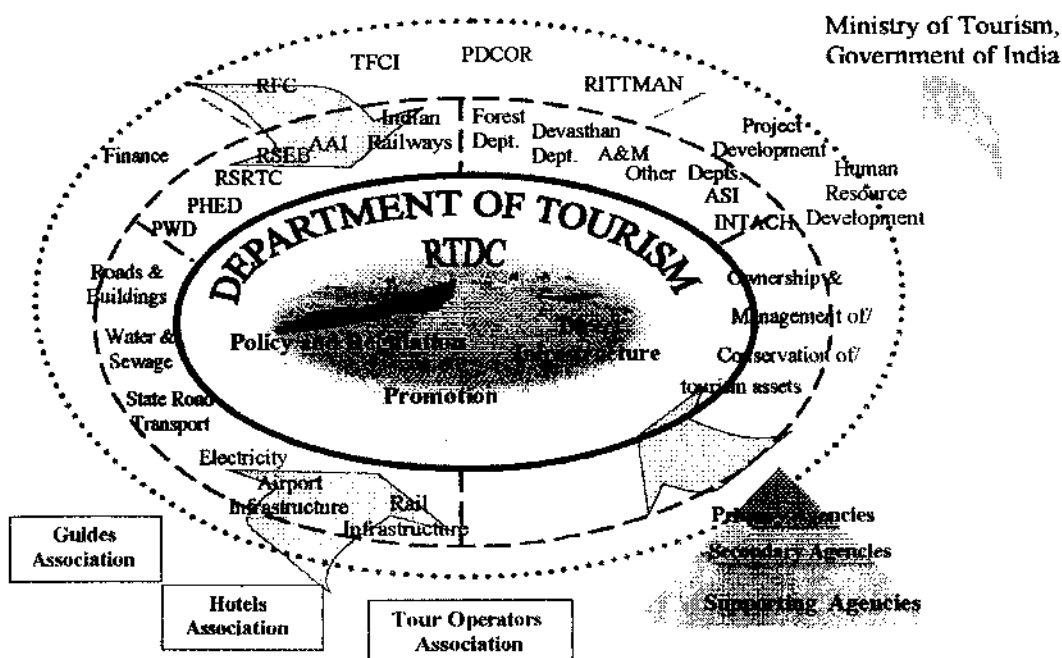
2.7.2 DoT, established in 1956, functions as an independent department within the Rajasthan State Government. Its functions include:

- Formulation and implementation of state policies and programmes related to tourism development and promotion
- Implementation of national policies and programmes related to tourism
- Co-ordination between various departments of the State Government and the private sector

2.7.3 DoT through its two state public sector undertakings, namely, RTDC and RSHCL provides accommodation and midway/ wayside facilities at various places across the state. DoT also runs the Tourist Reception Centres (TRCs)/ Tourist Information Bureaus (TIBs) at important tourist locations in the state. RTDC also organises various local, regional and state level conducted tours for visitors. Besides these, DoT also carries out/ supports various promotional activities such as organisation of Rajasthan promotion seminars in different states and countries, organisation of fairs and festivals, art competitions and exhibitions, etc.

Exhibit 2.13

Institutional Framework for Tourism in Rajasthan



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Other Key Agencies / Institutions

2.7.4 These include the agencies that provide infrastructure/ support for tourism in the state, etc. as shown in the Exhibit 2.14

Exhibit 2.14

Other Agencies/ Institutions' Support for Rajasthan Tourism

Agency/ Institution	Role
State Level Institutions	
Public Works Department (PWD)	<ul style="list-style-type: none"> Civil works falling under roads, bridges and public buildings and also work falling under activities like improvement of water bodies Responsible for maintenance of roads and government buildings Construction and maintenance of Helipads in the state
Rajasthan State Road Transport Corporation (RSRTC)	<ul style="list-style-type: none"> Provides travel network (buses and bus stations) across the state
Public Health and Engg. Department (PHED)	<ul style="list-style-type: none"> Responsible for supply of water and management of sewage systems
Local Municipal Councils/ Municipalities and local agencies (eg., JDA for Jaipur, etc.)	<ul style="list-style-type: none"> Solid waste management, laying of roads and footpaths, street lighting, law and order, etc.
Urban Improvement Trust (UIT)	<ul style="list-style-type: none"> Construction and maintenance of Traffic circles, street lighting, slum development, laying of roads and pavements, public utilities, etc.
Rajasthan State Electricity Board (RSEB)	<ul style="list-style-type: none"> Responsible for electricity generation and distribution
Department of Forest and Wildlife	<ul style="list-style-type: none"> Ownership and conservation of protected areas and wildlife in the state
Archaeology and Museums Devasthan Department	<ul style="list-style-type: none"> Ownership and conservation of archaeological wealth of the state Ownership and management of land and property at religious places
Rajasthan Urban Infrastructure Development Project (RUIDP)	<ul style="list-style-type: none"> Implementation of urban infrastructure projects in Jaipur, Udaipur, Jodhpur, Ajmer, Bikaner and Kota
Central level/ National Institutions	
Indian Railways	<ul style="list-style-type: none"> Railway lines, stations and services
Airports Authority of India	<ul style="list-style-type: none"> Providing for Airport infrastructure and Airstrips
Archaeological Survey of India	<ul style="list-style-type: none"> Ownership and conservation of certain archaeological sites in the state
INTACH	<ul style="list-style-type: none"> Restoration and conservation of archaeological sites

2.7.5 Other agencies that are involved (indirectly) in the execution of tourism-related projects in the state include Rajasthan Small Industries Corporation (RAJSICO), Avas Vikas Sansthan (AVS), District Rural Development Agency (DRDA), District Collectorates (DC) and local self government bodies like Municipal Corporations, Municipal Councils, Gram Panchayats, etc. Given the nature of tourism projects, the DoT liaises with other agencies/ departments on a regular basis for planning and implementing projects related to tourism development and promotion.

2.7.6 Support Agencies of Direct Relevance to Tourism Sector include Tourism Finance Corporation of India (TFCI)- plays a developmental role within the overall policies of Government, Project Development Corporation Limited (PDCOR),- a joint sector company between HDFC, IL&FS and Government of Rajasthan, set up with the prime objective of implementing infrastructure projects in the state on a commercial format and other agencies that assist and facilitate private sector in investing in the state such as Bureau of Industrial Promotion, Rajasthan Finance Corporation, etc.





Recent Institutional Initiatives

2.7.7 As seen above, the conventional institutional framework is in place in Rajasthan to enable direct and indirect development of tourism in the state. In addition, the state has recently carried out a variety of Institutional Incentives to improve and co-ordinate tourism development in the state. The main ones are as described below.

- Rajiv Gandhi Tourism Development Mission** has been set up in 2001 under the chairmanship of the Chief Minister to ensure the time bound development of the tourism sector.
- A **State Tourism Advisory Board** under the chairmanship of the Chief Minister has been created for handling tourism-related policies and issue guidelines for the development of tourism in the State
- A **Standing Committee** under the chairmanship of Director, Tourism and comprising heads of various institutes of hotel management and tourism faculty has been appointed for promotion of education in tourism
- Divisional Co-ordination Committees** for tourism have been setup to look after co-ordination of various agencies at the divisional level.
- District Tourism Promotion Committees** have also been setup headed by the District Collectors to seek more effective and active involvement of public representatives and Panchayati Raj institutions.

2.7.8 As can be seen the main thrust of these institutional initiatives is to provide an integrated decision making focus to the tourism sector in the state at a local, district, divisional and state level. These initiatives are a step in the right direction in terms of achieving better co-ordination amongst various agencies in the development of the tourism industry.

2.7.9 Given the fact that these Institutional Initiatives are already underway, the suggested focus areas for implementation are as follows:

- Need for Common Vision/ Direction
- Need for clear norms on prioritisation of identified tourism projects
- Need for avenues for public / local community participation in planning
- Need for scientific planning and monitoring of tourist movements
- Empowerment of Regional Offices of DoT and Bottom-up Approach to Tourism Planning
- Explore the opportunity for setting up of a state level equivalent of TFCI for funding tourism projects (especially in SME sector)
- Establishing a Tourism Monitoring Cell

2.7.10 With these initiatives it is anticipated that in the overall scenario, the role of DoT would be to act as a stimulus for the creation and development of a strong and vibrant tourism industry towards the socio-economic development.



2.8 TOURISM AND EMPLOYMENT

2.8.1 The economic benefit of tourism development projects have been measured in terms of employment generated directly in the tourism sector, as well as in the economy as a whole due to linkages of the tourism sector with the rest of the economy.

Exhibit 2.15

Employment Potential of Tourism in Rajasthan

Year	Incremental Tourist Expenditure (Rs. Mn)		Direct Incremental Employment	Total Incremental Employment
	Domestic	Foreign		
2002	103	53	9867	23143
2003	107	59	10540	24745
2004	111	65	11193	26299
2005	115	71	11913	28014
2006	128	90	14058	33126
2007	125	64	12001	28143
2008	131	69	12736	29880
2009	138	75	13530	31759
2010	144	82	14300	33795
2011	188	122	19831	46667
2012	147	99	15779	37159
2013	154	106	16659	39239
2014	161	113	17592	41447
2015	169	120	18583	43791
2016	177	128	19634	46280
2017	168	84	15914	37305
2018	175	88	16652	39038
2019	183	92	17426	40854
2020	191	96	18238	42759
2021	200	101	19089	44756
Cumulative Employment Potential			415528	718200

2.8.2 The forecast tourist traffic is estimated to create an additional employment potential of over 7 Lakh in the tourism industry in Rajasthan over the next 20 years, of which around 3 Lakh is estimated by way of direct employment potential and over 4 Lakh by way of indirect employment potential as indicated in Exhibit 2.15

2.8.3 Exhibit 2.16 gives the employment potential chart for various categories of tourist projects.

Exhibit 2.16

Employment Potential of Various Tourist Expenditure Areas

Category	Overall Employment Potential	Potential for Women Employment	Potential for Artisan Employment
Accommodation			
Star/ Heritage Hotels	High 50-300/ unit <ul style="list-style-type: none"> Front Desk Housekeeping Food Service Maintenance 	High 5-50/ unit <ul style="list-style-type: none"> Front Desk Housekeeping Administration Food Service 	Medium 5-10/ unit <ul style="list-style-type: none"> Live performances Souvenirs and Handicraft



	Overall Employment Potential		Potential for Women Employment		Potential for Artisan Employment
		• Others (administration, travel, entertainment, health and beauty, etc.)		• Salons	• stores
Other Hotels	High 15-60/ unit	• Front Desk • Housekeeping • Food Service • Maintenance	Medium 5-20/ unit	• Front Desk • Housekeeping	• Souvenirs and Handicraft stores
Guest	Low 4-5/ unit	Basic services on offer	High 1-3/ unit	Can be managed by housewives	Low
Dharamshalas / Dormitories	Low 5-10/ unit		Low 1-2/ unit		Low
Land and Travel Services					
Tour Operators	High 10-80/ unit	• Reception • Administration • Drivers • Guides	High 5-10/ unit	• Reception • Administration	Low
Transport	High	• Drivers	Low		Low
Food Service					
Restaurants	High 20-40/ unit	• Service • Kitchen • Helpers	Low 2-5/ unit	• Kitchen	• Cultural shows (occasionally) Low 1-2/ unit
Wayside facility	High 10-20/ unit	• Service • Kitchen • Helpers	Low	• Kitchen	Low
Recreation Centres, Clubs, Complexes, Resorts, Health Resorts and Recreation Centres (etc.)	High	• Live performances • Artisans • Instructors • Safari Guides • Administration	High	• Live Performances • Instructors • Administration	High • Live performances • Shilpgram artisans
Souvenir Shopping					
Direct Retail	Medium	• Sales • Administration	Medium	• Sales • Administration	Low
Indirect Manufacturing	High	• Weavers • Craftsman • Sculptors, Potters • Smiths • Artisans	High	• Weavers • Craftsman • Sculptors, Potters • Smiths • Artisans	High • Weavers • Craftsman • Sculptors, Potters • Smiths • Artisans
Others					
Guide Service	Medium		Low		Low

Potential for Women Employment

2.8.4 Women comprise a low proportion of persons working in the organised sector of the state. A notable feature of the tourism sector is that it employs a large proportion of women, educated and uneducated, skilled and unskilled. Women are in greater numbers than men in: hotels, airline services, travel agencies, handicrafts manufacture, cultural activities,



other tourism-related activities. Tourism thus offers a large potential for the employment of women and socially disadvantaged groups in Rajasthan.

2.8.5 As seen in Exhibit, the project sectors identified in the perspective plan, which offer maximum potential for employment of women are accommodation, tour and travel services and recreation. Other project sectors such as shopping also generate large direct and indirect opportunities for employment of women.

Potential for Artisan Employment

2.8.6 The projects that offer maximum opportunity for creating employment for artisans are in the recreation and souvenir-shopping category. Recreation facilities like theatres, cultural complexes and Shilpgrams, etc. offer maximum opportunities for employing the local artisans.

2.8.7 To maximise opportunities for local participation, training programmes need to be made available to residents of the state, especially younger people. To the extent possible, these employment opportunities should be met through the local populace/ community and only specialist positions recruited from outside the state. The key objective should be to achieve high and appropriate tourism standards. Training programmes can raise the skill base of the industry and thereby contribute to the delivery of quality tourist experiences

2.9 TOURISM AND ENVIRONMENT: ISSUES IN RAJASTHAN

2.9.1 Tourism activity like any other industry has the potential to disturb the environment of the native place. This could be in the form of increased air, water and noise pollution, destruction of the social and cultural fabric of the native place, disturbance/ destruction of the natural biodiversity of the place, etc. Exhibit 2.17 gives an illustrative list of environmental issues that may arise due to increased tourism activity in Rajasthan as is forecasted over the next 20 years.

Exhibit 2.17

Tourism and Environment Issues in Rajasthan

Environmental Issue	Connection to tourism	Environmental problems arising from / addressed by
Negative effects of increased tourism activity		
Changes of biological resources	Tourism activities such as hunting, game camping and other sports may lead to depletion of ecosystems and species	<ul style="list-style-type: none"> • Loss of biological diversity • Soil contamination
Land use and environmental restructuring	Construction of roads, hotels, resorts, ropeways and other infrastructure	<ul style="list-style-type: none"> • Loss of biological diversity • Soil erosion
Waste discharge in water, air and land	Increase in the number of persons in tourism areas leads to increase in amount of waste	<ul style="list-style-type: none"> • Air pollution • Water pollution • Soil contamination
Water use for human activities	Increased consumption of scarce resources during tourism seasons	<ul style="list-style-type: none"> • Resource scarcity
Energy production and consumption	Tourism will lead to increased use of various means of transport	<ul style="list-style-type: none"> • Greenhouse effect • Destruction of ozone layer • Air pollution
Human health and environmental disasters	Emission of noise and gases from traffic will affect human health and	<ul style="list-style-type: none"> • Noise pollution • Air pollution



Environmental Issue	Connection to tourism	Environmental problems arising from / addressed by
	increase destruction of buildings of cultural value	
Positive effects of increased tourism activity		
Resource Management	Increased income from tourist may lead to better resource management Tourist interest in flora and fauna may lead to an increase in area of natural reserves	<ul style="list-style-type: none"> • Loss of biological diversity • Soil contamination and erosion
Pollution monitoring and control	Demand from tourists for good quality drinking water, etc. may lead to better monitoring	<ul style="list-style-type: none"> • Water pollution • Air pollution • Noise pollution
Effects of environment quality on tourism activity		
Ecosystems inventories	Ecosystems such as forests, deserts, wetlands, etc. will influence tourism demand	<ul style="list-style-type: none"> • Resource scarcity • Loss of biological diversity
Lithospheric and hydrological systems	Topography, soil type, amount of precipitation will influence tourism demand	<ul style="list-style-type: none"> • Soil erosion • Resource scarcity
Atmospheric system	Temperature and air pollution may influence tourism demand	<ul style="list-style-type: none"> • Air pollution

2.9.2 Although a generic environment legislation is present in Rajasthan, there is currently no legislation that deals with the direct effects of tourism activity on the environment of the native place.

Eco-tourism in Rajasthan: Key Issues

2.9.3 Eco-tourism is generally described as 'tourism associated with protected areas'. Eco-tourism, a form of nature based tourism, aims to be ecologically, socio-culturally, and economically sustainable while providing opportunities for understanding and appreciating the natural environment. The three elements of Eco-tourism in Rajasthan perspective could be identified as:

- Focus of attraction is natural environments (e.g. wetlands or deserts) or specific components thereof, such as a particular type of animal or plant.
- Emphasis is on learning as an outcome of the interaction between tourists and natural environment. Eco-tourism is therefore differentiated from a generic nature-based tourism that are more *leisure based* or those that are *adventure oriented*.
- Sustainability which ensures that the integrity of those places is not undermined whilst understanding and appreciating natural attractions.

2.9.4 A total of 20 Eco-tourism projects to be implemented in the next 5 years have been proposed by the Rajasthan Forest Department. The estimated spend on the projects is close to Rs. 574 Lakhs with almost 50% investment coming in the first two years.

Tourism Destinations in Rajasthan—Degree of their Environmental Sensitivity

2.9.5 The main tourism destinations and the degree of their environmental sensitivity are provided in the Exhibit 2.18



Exhibit 2.18

Environmental Sensitivity of Various Tourist Destinations in Rajasthan

Location	Eco Sensitivity	Key Issues/Concerns
Jaipur	High	<ul style="list-style-type: none"> Air pollution due to increased vehicular traffic Scarcity of drinking water Problem of effluent discharge and waste management Depletion of natural areas due to construction activity
Ajmer	High	<ul style="list-style-type: none"> Potential threat to Ana Sagar and Poy Sagar due to increased usage of lake Air pollution due to increased vehicular traffic Problem of effluent discharge and waste management
Pushkar	High	<ul style="list-style-type: none"> Pollution of the Pushkar Lake and surroundings Improper sewage disposal during the Pushkar fair
Jaisalmer	High	<ul style="list-style-type: none"> Problem of sewage disposal affecting the foundation of the structures of the fort and its precincts
Sariska NP	High	<ul style="list-style-type: none"> Increased vehicular traffic will disturb the natural habitat of wildlife in the park Destruction of vegetation due to increased tourist activity
Keolodeo NP	High	<ul style="list-style-type: none"> Increased vehicular traffic will disturb the natural habitat of wildlife in the park
Ranthambhor TR	High	<ul style="list-style-type: none"> Increased vehicular traffic will disturb the natural habitat of wildlife in the park Destruction of vegetation due to increased tourist activity
Udaipur	High	<ul style="list-style-type: none"> Increased commercial activity around the lakes due to conversion of residential places into hotel accommodation further leading to discharge of effluents to the lakes Air pollution and congestion due to increased vehicular traffic
Mount Abu	High	<ul style="list-style-type: none"> Air pollution due to increased vehicular traffic High pressure on carrying capacity of the hill station
Desert National Park	Medium	<ul style="list-style-type: none"> Degradation/ destruction of the natural habitat of Desert National Park
Silisserh	Medium	<ul style="list-style-type: none"> Contamination of lake water due to tourism sports and discharge of waste
Rajsamand	Medium	<ul style="list-style-type: none"> Water pollution due pilgrims bathing and waste discharge from the nearby temples
Banswara & Dungarpur	Medium	<ul style="list-style-type: none"> Threat to tribal habitat due to increase tourist arrival and associated commercial activity
Others locations	Low	

2.9.6 Tourist destinations that have high degree of environmental sensitivity are places of high tourist visitations. They face potential environmental threat due to pressure on civic amenities, especially the natural resources. The main destinations of growing environmental concerns due to increased tourism activity are the National Parks and Wildlife Sanctuaries that fall on the eastern border of the state.

2.9.7 Very few directly polluting investments have been proposed in the perspective plan and there is no significant negative impact on the environment and ecology. In fact, eco-tourism projects suggested in the perspective plan would be a big step towards generating interest towards ecological issues. Improved sewerage and drainage facilities would contribute positively to the ecology and hygiene levels at the places of tourist interest. At a broad level, it would also enhance the overall tourist experience. For example, improvement in the public amenities, monument landscaping site enhancement, cleaning of water bodies, and plantation of greenery will have a beneficial impact on the environmental of the cities.



Suggest

2.9.8 as well tourism framework

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Suggested Environmental Controls for Tourism Projects in Rajasthan

2.9.8 Given Rajasthan's increasing popularity as a tourism destination with foreign as well as domestic tourists and the growing popularity of tourism concepts such as nature tourism, eco-tourism, rural tourism, it is necessary to outline specific environment controls framework to ensure sustainability of tourism.

2.9.9 With proper ecological environmental controls, the threat to ecological balance could be mitigated. Some of the controls would be as mentioned below:

Forest Areas

- Restricting development of facilities (roads, hotels, etc.) inside the protected areas. Allowing bare minimum civic amenities inside the protected area
- Restricting vehicles movement within the protected areas
- Wherever possible, creating walk-ways, pre-marked nature trails, etc. that would aid smooth tourist flow within the protected areas and ensure less tourist nuisance

Tourism Projects/ Products

- Hotels: Subsidy on installation of ETPs & solid waste management system, subsidy on installation of renewable energy equipment (solar cell, biogas, etc.)
- Water tourism: Demarking only non-sensitive areas for water sports activities

Urban Agglomerations

- Development of region in a pre-planned manner so as to avoid concentrated tourist activity in a particular place thereby reducing the pressure on natural resources. For example, develop tourist infrastructure in vacant areas around the main cities to reduce demand on the city's civic infrastructure and resources.
- Devise a plan for effective collection, treatment and discharge of effluents from settlements within the walled cities in the state. For example, Jaipur, Udaipur, Jaisalmer, etc.
- Conservation of old/ walled cities through restriction of polluting vehicles within the precincts and by architectural controls and/ or restriction on new construction activity within these old/ walled cities
- Soil conservation activities such as plantation, afforestation, etc. to be made mandatory for new tourism projects.

Carrying capacity enhancement

2.9.10 The over consumption of resources by tourists and tourism infrastructure is incompatible with sustainable development. The carrying capacity at several places like Ajmer, Mount Abu, Jaipur, Udaipur in Rajasthan has exceeded with the increase of tourist inflow. There is a risk of tourist demand for resources (land, water, energy) competing with the needs of local population thereby increasing social inequality and injustice.

2.9.11 Tourism in Rajasthan, which was mainly mass tourism in the past was 'producer driven'. The industry today is becoming increasingly consumer-driven. A well informed, responsible tourist is putting increasing pressure on the tourism industry to behave



more responsibly. As a result, the industry is aligning itself to address issues of carrying capacity.

2.9.12 The issue of carrying capacity has often been addressed by developing alternate tourist locations, thereby redistributing the tourist activity. However, this is easier done with activity driven tourism. Given the nature of tourism in Rajasthan, which is more passive (sight seeing), it would be difficult to address the issue of carrying capacity purely by creating or promoting new locations. Existing locations such as Ajmer, Jaipur, Udaipur would continue to attract a large number of tourists arriving in the state due their importance.

2.9.13 Tourism industry in Rajasthan lacks information on the requirements of sustainable tourism and on how to integrate economic interests with environmental and social requirements. While the tourism industry in Rajasthan may be willing to improve their products and services, there would be an imminent conflict between the industry's pursuit of economic gains and social and environmental responsibility.

2.9.14 Consumer behaviour in tourism is both a product and the cause for change in policies by the government and industry. Therefore, a comprehensive approach is required to solve the problems associated with market-driven tourism. Some of the recommendations that would influence tourist consumer behaviour are as provided below:

- Presently the usage of mass media to promote tourism in Rajasthan is restricted to advertisements, painting images of destinations rather than providing relevant information for potential travellers. Mass media can be effectively used to influence travel decisions and consumer behaviour in the destinations.
- There is a lack of reliable and appropriate research data on the determinants of tourist demand, motivation and behaviour. Statistics should be maintained and, if required, periodic researches undertaken to assess emerging tourist trends and identify sustainable alternatives.
- The key to develop effective partnerships in tourism industry in Rajasthan is to remove the imbalance in power between the different stakeholders. The tour operator and guides wield a considerable influence on the tourist flow and activity in the state. As a result most tourist activity in the state is concentrated in a few pockets. Hotels established outside the main tourist hubs attract only foreign tourist groups. Tour operators should be educated on the importance of carrying capacity and the need to spread the tourist activity away from the congested places.

2.9.15 The most obvious of the instruments and remedial measures available are:

- Legal measures: Rules and regulations that monitor the growth of tourism infrastructure at a particular place or an area. This could be mainly in form of restriction on the construction of new hotels and other accommodation facilities.
- Market based instruments such as taxes to influence market prices of tourism products and services.
- Industry self-monitoring: A self imposed code of conduct across the tourism industry participants like hotels, tour operators, guides, taxi operators, etc.
- Good local transport facilities: To ensure tourist movement away from the hubs, it is essential that adequate and affordable local transportation facilities must be provided for the tourists.





carrying

2.10 STRATEGIC ACTION PLAN

2.10.1 The Strategic Action Plan for Tourism Development in Rajasthan should focus on the following:

- Creation of New Circuits/ Destinations
- Creation of New Tourism Products
- Tourism as a Vehicle for Area Development
- Creation of Tourism Relevant Direct Infrastructure
- Exploiting Opportunities to Increase Tourism Revenues
- Tourism Marketing

2.10.2 Each of these entails a range of activities which are summarised below:

Action Plan Focus: Destinations and Circuits

STRATEGY

ACTION

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| <p>Promote lesser explored destinations</p> <p>Promote lesser explored circuits</p> | <ul style="list-style-type: none"> • Provide basic tourist infrastructure and reliable services at these destinations • Establish local level marketing association jointly with the private sector to design specific marketing and promotion incentives and activities • Initiate joint marketing and promotion action with Central Govt. and neighbour states wherever opportunity exists. For example, Hadoti and Vagad circuits • Looking at the tourist response, provide upgraded and new amenities and services to meet their needs |
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Action Plan Focus: New Tourism Products

STRATEGY

ACTION

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| <p>Renew tourist interest in the state by creating new tourism concepts and products</p> <p>Creation of Tourism Zones for Specific Tourism Products</p> | <ul style="list-style-type: none"> • Identify sites and their potential to develop specific 'tourism products' • Create tourism magnets based on the recreational activities, family entertainment and leisure facilities • Explore possibility of developing new products like 'Boutique' resort tourism, archaeological tours related to ancient sites, tribal culture tours • Desert Circuit could be developed and marketed for 'Adventure' and 'Rural' tourism • Ajmer-Pushkar Circuit could be developed as a 'Religious' Tourism Zone, offering integrated pilgrim infrastructure • Jaipur-Alwar-Sariska could be developed and marketed as 'Ethnic n Corporate' zone, with a greater focus on weekend and conference/ incentive tourism given its proximity to Delhi • Kota-Bundi could be developed and marketed as an undiscovered 'Nature and Heritage' zone |
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Action Plan Focus: Area Development through Tourism

STRATEGY

ACTION

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| <p>1. Integral Development of</p> | <ul style="list-style-type: none"> • Improve civic infrastructure in Ajmer and Pushkar (water, power, roads exportation) |
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STRATEGY	ACTION
Ajmer-Pushkar	<ul style="list-style-type: none"> Undertake comprehensive 'clean and green' Ajmer-Pushkar programme by focusing on solid waste and sewage disposal, water supply, drainage, lake cleaning and city beautification Reduce traffic-related air pollution by imposing restriction on vehicle movement within the city Implement landscaping at key tourist attractions in the cities
2. Create low-impact, non-degrading tourist infrastructure in the region	<ul style="list-style-type: none"> Encourage spreading of tourism activity outside Ajmer-Pushkar by imposing restrictions on Hotel construction in the towns Aggressively promoting new tourist destinations around Ajmer-Pushkar and diverting the tourists to these places by providing basic tourism infrastructure Decongestion of roads by restricting vehicular traffic near the pilgrim centres.
3. Increase avenues to generate income from tourist activities	<ul style="list-style-type: none"> Encourage construction of mid-priced and luxury hotels in the region Creation of entertainment and leisure facilities in the region. Developing domestic airport and introducing regular air-services to Ajmer. Promote the proposed airport as a gateway airport for tourist indenting to cover multiple tourist circuit in the state. Build the promotional campaign of Ajmer-Pushkar around the theme of 'Gateway to the heart of Rajasthan'.

Action Plan Focus: Tourist Infrastructure

STRATEGY	ACTION
1. Enhancement of Connectivity infrastructure	<ul style="list-style-type: none"> Prioritise airport projects. For example, Jaipur Airport upgradation, New Airstrips at Ajmer Encourage charter air service companies to supplement scheduled services Private sector participation in providing last-mile connectivity to the attractions Identify and prioritise railway network upgradation and modernisation programme, with special attention given to routes linking tourist regions, destinations and centres Upgraded/international standard tourist taxi/coach services Introduce metered taxi/rickshaw services in main cities
2. Provide high quality hospitality experience	<ul style="list-style-type: none"> Solicit foreign investment in hotels segment Inculcate aspects of traditional hospitality in the service offered by the hospitality industry
3. Enhanced tourist experience as they move around in the state	<ul style="list-style-type: none"> Provide navigational aids on all tourist routes (e.g. signage and information on wayside facilities) Provide upgraded / standardised tourist facilities (restaurants, models, TRCs, wayside facilities, etc.) Provide site interpretation aids at all tourist places Ensure availability of organised guide services at important tourist location.

Action Plan Focus: Increasing Tourism Revenues

STRATEGY	ACTION
1. Extension of tourist	<ul style="list-style-type: none"> Develop seasonal themes and product packages of experience appropriate

**STRATEGY****ACTION**

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| <p>season in the state</p> <p>2. Increase Average length of Stay (ALOS) of tourist in the state.</p> <p>3. Increasing daily span of tourist activity</p> <p>4. Increasing daily tourist spends</p> <p>5. Attract specific interest / high yield tourists</p> | <p>to different seasons</p> <ul style="list-style-type: none"> • Reviewing and remodeling of local sight seeing tours to extend duration of stay at a place • Focussed marketing of lesser explored tourist attractions around the place to make them an inevitable part of the local sight seeing itinerary • Convince tour operators and guide to standardise itineraries to avoid unhealthy competition • Create new attractions and tourism products <p>Introduce events in the evening</p> <p>Popularise site-visitation after sunset</p> <p>Activities for the tourist leisure time</p> <ol style="list-style-type: none"> 1. Passive – Parks & Gardens, Fountains, Lighting of Monuments 2. Active – Shopping, live performances, food festivals, food plazas / food courts, light and sound shows <ul style="list-style-type: none"> • On travel: Example, novel concepts like Open top/ Glass top/ double decker buses • On accommodation: Example, help tourists upgrade from economy to mid-priced / luxury hotels • On food and beverages: Example, specialty and fine dining restaurants, food courts, local cuisine restaurants • On recreation: Example, theatre, music and dance performances • On Shopping: Example, shopping arcades, handicrafts and souvenir stores. • Others: Example, entry charges at tourist location, charity for conservation causes <ul style="list-style-type: none"> • Create and target specific products to special interested tourist groups such as Honeymoon package, Adventure package, Nature lovers package, etc. • Identify special interest groups and market products through appropriate channels – Segmentation, Targeting and Positioning. |
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Action Plan Focus: Tourism Marketing**STRATEGY****ACTION**

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| <p>1. Research based marketing and promotion campaign</p> <p>2. Reorganisation of Tourism promotional activity in the state.</p> <p>3. Attracting new</p> | <ul style="list-style-type: none"> • Constitutionalise a market research and monitoring cell • Establish a system of collection and analysis of statistics related to tourist arrival in the state • Co-ordinate / co-operate with the Central Governments programme of detailed market research in key markets of Europe and Asia • Design./ Create specific activities targeted at segments and niches for which products have been developed <ul style="list-style-type: none"> • Establish joint- sector promotion body ensuring effective representation of all tourism shareholders • Co-ordinated marketing efforts with the Central government and with other states • Standardisation of communication material • Developing consistent sales training and product education for personnel at customer touch points • Building close working relationship with the carriers and wholesale inbound operators <ul style="list-style-type: none"> • Focus on MICE segment (Meetings, Incentives, Convention and |
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tourist categories /
groups

- Exhibition) and Creation of convention centres
- Developing spin-off business from major national and international events and activities particularly in Delhi
- Niche tourism activities like Eco-tourism and Rural tourism.

Conclusion

2.10.3 Thus, as seen above there is a strong need to have a holistic approach to tourism development, which is sustainable, participative and responsible leading to overall development of the state. Rajasthan already has a well-developed tourist infrastructure amongst Indian states as well as a new Tourism Policy and institutional initiatives aimed at harnessing the tourism opportunity in the future. The key challenge ahead is to ensure that the on-going and proposed tourism projects dovetail into the overall tourism objectives of the state to offer a contemporary range of tourist experiences (besides the traditional tourist experiences that Rajasthan is known for). This will enable Rajasthan to retain its prominent position in Indian tourism scenario in the future.