



**GOVERNMENT OF KERALA
KERALA STATE PLANNING BOARD**

**FOURTEENTH FIVE-YEAR PLAN
(2022-2027)**

**WORKING GROUP ON
TOURISM**

REPORT

**INDUSTRY AND INFRASTRUCTURE DIVISION
MARCH 2022**

FOREWORD

Kerala is the only State in India to formulate and implement Five-Year Plans. The Government of Kerala believes that the planning process is important for promoting economic growth and ensuring social justice in the State. A significant feature of the process of formulation of Plans in the State is its participatory and inclusive nature.

In September 2021, the State Planning Board initiated a programme of consultation and discussion for the formulation of the 14th Five-Year Plan. The State Planning Board constituted 44 Working Groups, with more than 1200 members in order to gain expert opinion on a range of socio-economic issues pertinent to the plan. The members of the Working Groups represented a wide spectrum of society and includes scholars, administrators, social and political activists and other experts. Members of the Working Groups contributed their specialized knowledge in different sectors, best practices in the field, issues of concern, and future strategies required in these sectors. The Report of each Working Group reflects the collective views of the members of the Group and the content of each Report will contribute to the formulation of the 14th Five-Year Plan. The Report has been finalized after several rounds of discussions and consultations held between September and December 2021.

This document is the Report of the Working Group on “Tourism”. The Co-Chairpersons of Working Group were Shri Baby Mathew, Managing Director, Somatheeram Group and Dr. V. Venu IAS, Additional Chief Secretary, Tourism Department. Shri. Santhosh George Kulangara, Member of the State Planning Board co-ordinated the activities of the Working Group. Er. Joy N.R, Chief, Industry and Infrastructure Division was the Convenor of the Working Group and Smt. Dhanya Chandrasekhar, Research Officer, Industry and Infrastructure Division was Co-Convenor. The terms of reference of Working Group and its members are in Appendix 1 of the Report.

Member Secretary

PREFACE

Tourism has been acknowledged as a priority sector in Kerala and one of the strong drivers of economic growth of the State. The State has been successful in creating a place of its own in this sector. This is evident from the achievements made by the industry both at the national and international levels. The tourism industry in the State is currently facing unprecedented losses because of COVID-19 and tourism units at present have no business, employment and income. The state needs to frame the right strategies to address the challenges in the Tourism industry during the 14th Five Year Plan. A Working Group was constituted for Tourism for Fourteenth Five Year Plan with Dr.Venu. V IAS, Additional Chief Secretary to Govt (Tourism) and Shri Baby Mathew, (Chairman and Managing Director, Somatheeram Ayurveda Group) as Co- Chairpersons and the committee held 3 sittings and conducted a detailed analysis of the sector. We are very grateful to all committee members for their participation and valuable contributions and suggestions/recommendations in the Working Group. Particular mention needs to be made for the contribution of Shri Santhosh George Kulangara., Member, State Planning Board right from the constitution of the Working Group to the finalisation of the Report. Special reference is mentioned for Shri. Joy N.R., Chief & Convener and Smt. Dhanya Chandrasekhar, Research Officer & Co Convener, Industry & Infrastructure Division, Shri. Vincent Sebastian, Deputy Director and Prof Saroop Roy B.R, Asst. Professor, KITTS & Member, Working Group on Tourism and other officers of State Planning Board for conducting meetings and for co-ordinating the materials from different members and preparing the report.

Baby Mathew
Managing Director
Somatheeram Group

Dr.Venu.V. IAS
Additional Chief Secretary to Govt Tourism

CONTENTS

SL No	Title	Page No
1	List of Tables	03
2	Abbreviations	05
3	Executive Summary	07
	Chapter 1 Introduction	11
4	Chapter 2 Review of Tourism Sector	13
	Chapter 3 14th Five Year Plan – A Strategic Approach for Tourism	27
5	Appendix 1	45
6	Appendix 2	48

LIST OF TABLES

1	Financial Achievement of Tourism sector in the 13th Five Year Plan	18
2	Tentative re-orientation of programmes	43

ABBREVIATIONS

BRDC	Bekal Resort Development Corporation
CBD	Convention and Biological Diversity
CBL	Champions Boat League
C-QUEST	Council for Quality Education System in Tourism
CMTLAS	Chief Minister's Tourism Loan Assistance Scheme
DMC	Destination Management Council
DTPC	District Tourism Promotion Councils
GSTC-D	Global Sustainable Tourism Council Destination
IPL	Indian Premier League
KFC	Kerala Financial Corporation
KTDC	Kerala Tourism Development Corporation
KTEF	Kerala Tourism Entrepreneurship Fund
KTIL	Kerala Tourism Infrastructure Ltd
KTM	Kerala Travel Mart
KTRA	Kerala Tourism Regulatory Authority
LSG	Local Self Government
OTT	Over the Top
PPP	Public Private Partnership
PRASAD	Pilgrimage Rejuvenation and Spiritual Augmentation Drive
RT	Responsible Tourism
SMiLE	Small and Medium Industries Leveraging Experiential Tourism
TWCSS	Tourism Working Capital Support Scheme
TESS	Tourism Employment Support Scheme
THSS	Tourism Houseboats Support Scheme
TGSS	Tourism Guides Support Scheme
UCCN	UNESCO Creative Cities Network

EXECUTIVE SUMMARY

Tourism continues to be significant for Kerala since it creates employment, generates income and opens cultures to the rest of the country and the world. On the one hand, Kerala is a treasure trove of tourism assets. On the other, the number of people moving as part of tourism is increasing world over. Hence tourism has continuing and promising potential in the State. The state has to focus on moving towards a sustainable growth path for tourism.

The State shall aim to accelerate tourist arrival in a sustainable and responsible manner; and be a welcoming, safe, clean, hygienic and accessible destination promising unique experiences to all. The state shall develop different strategies to cater to the differing needs of international, domestic (other states) and local (within Kerala) tourists. Tourism development has to be responsive to the emerging trends in tourism like the increasing number of young travellers, solo travellers, and senior travellers. These may involve different types of tourism products and packages.

The tourism industry in the State is currently facing unprecedented losses because of COVID-19 and tourism units at present have no business, employment and income. In order to rebuild the lost business in the industry focusing tourists, tourist entrepreneurs and employees, the State Planning Board has constituted the Working Group on Tourism.

The Committee met thrice and conducted a review of Thirteenth Plan programme. The 14th Five Year Plan Working Group on Tourism is divided into sub groups in the following thematic areas namely; i) Developing World Class Destinations ii) Creating New/Innovative/Products iii) Sustainable Tourism iv) Marketing and Promotion and v) Regulatory framework and HR. The focus of 14th Five Year Plan is to make Kerala a sustainable model by providing quality experience for tourists and quality life for local community with the responsible engagement of all other stakeholders.

The vision of the tourism sector in the 14th Five Year Plan is to position Kerala Tourism as sustainable and responsible model by providing quality experience to tourists and enhanced economic benefits to the local communities with the intelligent engagement of all stakeholders.

The major objectives of the 14th Five Year is (i) to upscale destinations for high quality visitor experience (ii) to create unique, innovative and diverse products for tourists, (iii) to adopt sustainable practices in tourism development (iv) to position Kerala as a vibrant destination in domestic and international market (v) to create a conducive environment for investment in tourism sector (vi) to create a regulatory framework for tourism business (vii) to develop human resources for tourism and hospitality sector, (viii) to promote PPP's on destinations/ products/business development and investment attraction and (ix) to develop innovative mechanisms for tourism data management.

The major recommendations put forward by the working group include:

Destination development - The State has to move towards a new 'Hub n spoke' strategy for destination development. Tourism hubs to be developed across each districts of Kerala on PPP mode. Iconic structures to be developed in each hub so as to create a destination

image. Hubs can be in existing established tourism destinations or new destinations, which has some sort of uniqueness. Department of tourism may provide a specific design for the transit hubs so as to get a unique identity and to be built and operated on a PPP model. Prioritise heritage tourism, cultural tourism, health tourism, caravan tourism, sports tourism, adventure tourism, water based tourism, monsoon tourism, MICE tourism etc.

Tourism infrastructure - A cabinet committee on Tourism and a task force on tourism infrastructure development to be formed for developing world class destinations. Tourism cannot be successful without concurrent development in health, sanitation, urban and rural planning, transport connectivity, local-self-government and other spheres.

Tourism products – Kerala shall strive to consolidate on the gains of the existing traditional tourism products like heritage / cultural tourism, hill station tourism, beach tourism, forest and wildlife tourism and backwater tourism. At the same time it is essential to build new products like health tourism, pilgrim tourism, culinary tourism, village tourism, festival tourism and farm tourism. Water sports, food and shopping at night are some of the avenues that can be explored. Tourism products linked to the states traditional industries like handloom, handicraft, coir and other arts have to be explored.

Destination Planning, development and management with Business development and investment models - Tourism Department shall promote Public Private Partnership (PPP) models in destination management. The Department shall develop and manage infrastructure for destinations in PPP model learning lessons from successful PPP model through a transparent process, thereby harnessing the efficiency and creativity of the private sector.

Special focus on Malabar tourism development. The Department shall prioritise the tourism developmental activities in Malabar region in the next five years. A Corpus fund shall be constituted for planning, development and implementation of innovative tourism projects/products in the area. Malabar should be developed rather than merely development of individual destinations and financial incentives/policy initiatives to attract investors needs to be evolved.

Master plans for sustainable inland waterway tourism activities to be developed. Waterway shelters to be designed and water taxis to be launched for transportation. Disperse houseboat operation and cruise activities to relatively under used stretches and regions.

Application of Information Technology - Artificial Intelligence, Virtual Reality, Augmented Reality, Robotics to be introduced to enhance the experience of tourists in the destinations. One stop solution for any tourism related queries shall be developed with the help of artificial intelligence.

Hospitality - Steps to be taken to address the issue of shortage of rooms in destination. Tourism department shall enquire the possibilities of opening of guest houses, inspection bungalows of all departments to tourists. Promotion of caravans and caravan parks to be set up giving top priority to tourists' safety, security as well as hygiene.

Tourism department along with panchayat may take steps to develop tourism in villages

committed to the promotion and preservation of cultural heritage and sustainable development imbibing the principles of Sustainable Development Goals.

Tourism Circuits - Prioritise the completion of already announced heritage projects at Muziris, Spice Route, Alappuzha, Thalassery and Travancore Heritage Villages to be established at least one in each district considering the heritage value of the region. Heritage buildings in the entire State to be restored for regaining the past glory.

Tourism investment and funding - Private enterprises will be encouraged to come up with new projects. The state may explore providing private investors in tourism, benefits, similar to investors in industrial sector. The State will focus on providing incentives to attract investors and make investments viable and competitive. Specific strategies will be chalked out to promote investments in various tourism sectors like accommodation, travel agents, tour operators, travel providers, cruise operators etc. Public funding will continue for tourism promotion, infrastructure and destination development.

Disaster resilient tourism - Tourism is a sector which is highly responsive to adverse conditions in the destinations. Floods during 2018 and 2019; and Covid 19 pandemic which followed, has had a very profound impact on the Tourism sector in the State. Tourist arrivals have fallen sharply, leading to losses for many. Many of the units have found it difficult to resume operations. Therefore special emphasis needs to be placed on helping units to restart operations and reach full capacity. This will go hand in hand with efforts to develop health protocols (hygiene and safety) and trust, so that people start travelling. Disaster resilience will have to be one of the guiding principles for tourism planning and implementation.

Responsible and participative tourism - State would focus on extending Responsible Tourism practices to all the destinations in Kerala; and promote rural tourism. This would make Tourism a participative process, create tourism friendly environment and generate employment for the local community. It will also connect local people with the tourism market and services.

Tourism and data management – Tourism is currently a dynamic industry which requires flexible planning. Such a planning requires strengthening the whole system of data collection, processing and end-use. It is essential to develop Data Management System for data management and analysis, in order to provide timely and accurate information to all stakeholders in the tourism industry which will ensure smooth running of tourism business. Steps to be taken to establish mechanism for tourism data management.

Skill Development and employment – Steps to be taken to upgrade human resources in the field of tourism to enable people to be gainfully employed in Kerala, other parts of India and rest of the world. Up-skilling and development of new skills based on the emerging requirements from the sector have to be given emphasis. Dedicated content as part of academics has to be combined with world class training through tourism training centres.

A robust integrated Tourism planning, development and management mechanism involving State, Tourism Department, Tourism agencies/organisation, industry stakeholders and others needs to be structured for fulfilling the 14th plan vision and objectives.

1. CHAPTER INTRODUCTION

The history of Kerala Tourism traces back to the establishment of Kerala Tourism Development Corporation (KTDC) in 1966. This was followed by the establishment of an international beach resort at Kovalam in 1976 with the patronage of Central Government. Government of Kerala declared tourism as an industry in 1986. Within a short span of three and half decades, Kerala succeeded in establishing its tourism brand in the international market. The first tourism policy of the State was announced in 1995 underlining the importance of Public- Private Partnership. This was followed by Kerala Tourism Vision 2025 and Tourism Policies in 2012 and 2017 giving strategic directions for developing the tourism sector in the State. While the initial policy focused on infrastructure development in the State, subsequent policies placed emphasis on sustainable tourism practices and enhancing visitor experience. The sector contributes around 10 % of the State GDP while providing employment for around 1.5 million people. From hardly 50,000 foreign tourist arrivals in 1986, the State has recorded about 1.2 million foreign tourist arrivals in 2019. The state also witnessed the arrival of 18.38 million domestic tourists in 2019.

Kerala tourism has developed unique products like backwater tourism, ayurveda and heritage tourism which has helped the industry to place a remarkable position in the world tourism map. The active role played by the tourism industry has resulted in creation of accommodation facilities ranging from luxury hotels to home stays. The conduct of Kerala Travel Mart (KTM) regularly once in two years with public-private partnership has helped in bringing new investments as well as a new model of marketing. The tourism department along with the private industry is regularly conducting innovative campaigns across the globe to capture tourist attention to the state. For providing high quality service to tourists, skilled human resource is necessary and the state has addressed the same by developing tourism and hospitality institutes that provide high quality training. The state has adopted sustainable tourism practices focusing on the need for community benefits and participation in tourism through its ecotourism and responsible tourism approaches. While the ecotourism activities are limited to the forests, and some plantations, the responsible tourism mission has spread its wings from four pilot destinations in its initial phase to the entire state. The responsible tourism initiative with the triple bottom line approach is able to go beyond the economic benefits of community by its engagement in preserving the socio-cultural aspects of the society as well as the natural environment. The Responsible Tourism initiative considers tourism in its totality and thus lays a platform to make the state “a better place for tourists to visit and a better place for people to live in”.

Although there has been increase in tourist numbers in the past several year, the growth rate was coming down. In 2019, the sector recovered from the 2018 floods and recorded the highest growth rate in domestic and foreign tourist arrivals in 2019. There was 8.52 per cent growth in foreign tourist arrivals and 17.81 per cent growth in domestic tourist arrivals compared to 2018. Although the tourism department predicted for a 10 % increase of arrivals in 2020, the COVID 19 pandemic shackled the entire industry. The

total foreign tourist arrivals came down to 0.34 million while the domestic tourist arrival dropped to 4.9 million. This has resulted a huge loss of revenue for the State. A similar situation continued in 2021 also. In addition to this, the State faces challenges such as poor connectivity within the state as well as from other states and countries, competition from neighbouring countries and product fatigues, which need to be addressed.

While formulating strategies for 14th Five-Year Plan, serious efforts have been taken to assess the performance during the 13th Plan. A review of initiatives at the state and centre as well as the challenges faced by the sector in the 13th Plan period has been done while preparing the strategies giving emphasis to developing high quality destinations, creating unique and innovative products, adopting sustainable practices, making Kerala a tourism investment friendly destination, tourism hubs, developing human resources for tourism and hospitality sector and establishing mechanisms for tourism data management.

2. CHAPTER REVIEW OF TOURISM SECTOR

The review of the sector has been done mainly by studying the earlier tourism policies of the state and centre. The State Tourism Policy of 2017 has been extensively reviewed, as this document provides the major direction for developing implementation strategies. Although the current national tourism policy that is operational in India is that of 2002, the draft policy which came out in August 2020, provides significant ideas that is relevant in the present context. The Tourism session of International Conference – Kerala Looks Ahead in February 2021 organised by Kerala State Planning Board provides input on the changing trends in international tourism, responsible tourism, segmentation in domestic tourist arrivals, Government investments in tourism and skill development in the sector. Review of the excerpts of Budget speeches has given an account of the perspectives of Government in tourism sector for the last five years. A detailed review of the tourism sector during the 13th Five Year plan is also taken to understand how effectively the sector performed in the last five years.

2.1 State Tourism Policy 2017

The State Tourism Policy of 2017 sees Tourism as an important sector that needs to be considered for development in the state. The major suggestions put forward in the policy include the following:

- Double the arrival of foreign tourists and 50 per cent increase in domestic tourist arrivals by 2021.
- To establish a Kerala Tourism Regulatory Authority (KTRA) to ensure quality service for tourists and curb unhealthy practices in the tourism sector which would be responsible in monitoring the functioning of different stakeholders.
- Formulation of Kerala Tourism Entrepreneurship Fund (KTEF).
- Development of tourism projects of international standards in selected destinations through PPP mode.
- Popularising monsoon tourism and experiential tourism.
- Enabling tourists to experience village life.
- Creation of new customised products for attracting young travellers, professionals, students and artists to the State.
- To address key issues of the tourism industry such as waste management in cooperation with the local bodies.
- Preparation of Action Plan for sustainable tourism development.
- Ensuring tourist-friendly, secure and safe destinations.

2.2 Draft National Tourism Policy 2020

Ministry of Tourism, Government of India has come up with the draft National Tourism Policy in 2020 with a view of national prioritisation of the sector to ensure focus, investment, alignment and competitiveness as precursors to maximize the impact of the tourism sector for the benefit of India at large. The policy is structured around nine strategic pillars (i) Welcoming the Visitor, (ii) Seamless Connectivity and Transport Infrastructure,

(iii) Destination Planning, Development and Management, (iv) Business Development and Investment Promotion, (v) Develop and Diversify Tourism Products, (vi) Skill Development, (vii) Market India, (viii) Quality Assurance and Standardization and (ix) Market Intelligence and Research with cross cutting support of Governance, Institutional Linkages and Stakeholder Engagement. The overarching theme of the Policy is to promote sustainable and responsible tourism, which will cut across all the strategic pillars to achieve the vision of the policy to make India a top most destination for sustainable and responsible tourism.

By Welcoming the Visitor, the policy aims to create a world class visitor experience for tourists so that the country is seen, felt, and experienced as warm, welcoming, safe, secure and easy to explore. The policy recognises that if managed effectively, transport and tourism synergies will improve visitor mobility to and within destinations, enhance visitor satisfaction, and help to secure the economic viability of local transport systems and services by servicing both residents and tourists. As part of destination planning, the policy recommends to develop a strategic framework including carrying capacity, access, basic infrastructure and core tourism infrastructure. The policy sees destination development as an ongoing exercise to be completed before tourist arrival and proposes to set up Destination Management Organization to coordinate the efforts of other agencies and industry towards a common goal of sustainable and competitive destination. The policy has recommended for an enabling framework for attracting domestic and foreign investment for various segments of industry such as accommodation, resorts, convention centres, theme parks etc. as part of business development and investment promotion. The policy also recommends for pursuing ease of doing business reforms in tourism sector and institutionalising State tourism index to encourage the State to undertake reforms. The policy advocates for customising the nation's bouquet of products based on culture, heritage, nature, beaches, mountains, wild life, wellness, cuisine, different landscapes, communities and climatic zones to attract travellers from specific markets, both as geographic entities and interest groups. Realising the need for well trained staff in the sector, the policy proposes to have destination based skilling initiatives to meet the skill gap as well as on training large number of existing workers in soft skills and other tourism related skills. The Policy advocates aggressive marketing of India as a tourist destination in overseas market as well as in domestic market focusing on key established markets along with identified emerging markets jointly with the States and Industry Stakeholders. The marketing strategies include specific brand campaign and media strategy, destination specific marketing and a drastic shift to digital marketing. The policy proposes to have a renewed focus on standardization of tourism products and services across all segments such as accommodation providers, tour operators, adventure tour operators, service providers like spa and wellness, guides, restaurants etc. For this, it is proposed to develop an effective classification system based on self-certification and fully digitized processes taking a graded approach, which classifies them into different categories as the industry has a spectrum of players of different sizes and price points. The Ministry has proposed to develop a robust market intelligent system to provide real time information to the trade and industry in areas like market trends, assessment of source markets etc. to help

them make informed decisions. The policy also feels the need for laying down governance mechanism at centre, state and destination level and stakeholder engagement to achieve a common vision, aspiration, set a cogent agenda and addresses issues that affect the tourism sector. For this, an elaborate framework will be put in place for creating synergy amongst different Ministries at the Central Government, State Governments, Local Governments and Industry Stakeholders to promote tourism in the Country.

2.3 International Conference - Kerala Looks Ahead, February 2021

Kerala State Planning Board organised an International Conference – Kerala Looks Ahead in February 2021 to discuss the future prospects of Kerala in key areas including agriculture, animal resources, fisheries, e-governance, higher education, industry, information technology, skill development and tourism. The session on tourism discussed the changing trends in international tourism, responsible tourism, segmentation in domestic tourist arrivals, Government investments in tourism and skill development in the sector. Key ideas and recommendations emerged from the session include the following:

- Experts think that pre-pandemic level in tourism will be attained only by 2024. It is important to develop health protocols and principles of trust so that people start travelling.
- Kerala needs to focus on domestic tourism sector as it will take some more time for international tourists to come in.
- Kerala should aim at (i) increasing GDP contribution from 10 per cent in 2019 to 20 per cent by 2025, (ii) increasing tourism employment from 23.5 per cent in 2019 to 40 per cent by 2025, (iii) increase expenditure on tourism from 1.27 per cent in 2019 to 5 per cent by 2025, and (iv) increase foreign exchange earnings of Rs 10,271 crores in 2019 to Rs 15,000 crores by 2025.
- There is change in demography of travellers and youth would comprise the major proportion of tourists in the coming years and therefore products have to be developed keeping view of this change.
- Planned itineraries mixed with cultural heritage and outdoor activities, heritage sites emphasising independent and self-guided tours could be explored in Kerala.
- New possibilities to be explored like honeymoon tourism, medical tourism, film shooting tourism, food and wine tourism, Fort Cochin-Jazz festival, create new stories on “Spice Tour” and coastal tourist train connecting Kovalam to Cochin.
- Focus on transformational travel which would be a life changing experience. Bed and Breakfast should be replaced by B and E (Bed and Experience) where the tourist should carry a great experience.

2.4 Budget Speeches from 2016 - 17 to 2021 - 22

The Budget speeches from 2016-17 to 2021-22 have been reviewed and major recommendations have been identified:

2.4.1 Budget Speech 2016 -17

- Strategies to double the number of foreign travellers and to increase the domestic tourist flow by at least 25%, thereby providing direct employment to four lakh more people.

- Special Investment Scheme for the development of infrastructure such as roads, water transport, electricity drinking water, wayside amenities etc.
- Muziris Heritage project to be completed within three years.
- New heritage projects similar to Muziris at Thalassery and Alappuzha
- Ten Heritage villages to be developed such as Balaramapuram, Mannar, Aranmula, Cheruthuruthy, Payyannore, Muthanga etc.
- Spice Route Circuit to be launched.
- Air strips aimed at tourism development with priority at Bekal, Wayanad and Idukki.
- Fast track activities for implementation of Sabarimala Master plan.
- Road development connected to Kannur Airport

2.4.2 Budget Speech 2017 -18

- Encouraging and propagating Nishagandhi dance and music festivals, Onam celebration, tribal dance festival, Pooram, Theyyam festivals and boat race etc.
- Upgradation of tourism guest houses and also for construction of new blocks at Guruvayoor, Thiruvananthapuram, Sulthanbathery, Peerumedu, Kozhikkode, Ponmudi and Munnar.
- The first two museums of Alappuzha Heritage Project - the Thomas Norton's Memorial and Coir museum be completed in 2017-18.
- The District Court in Thalassery to be undertaken in Heritage Protection Network
- Rejuvenation of Pathiramanal Ecotourism Project
- Master plan for the development of tourism by linking the backwaters and rivers in Malabar.

2.4.3 Budget Speech 2018 -19

- Bring Ponnani and Beypore under heritage scheme with the commencement of 'Spices Route'
- Construction of Muzhappilangadu Beach Tourism project included through KILFB.
- Encouragement of various programmes like Kochi Biennale, Nishagandhi Dance and Music Festival, Onam Fest, Pooram, Theyyam Celebrations, Boat races etc.

2.4.4 Budget Speech 2019 -20

- Kerala Boat League with boat race on every weekend at least in one centre starting from Nehru Trophy on the second Saturday of August to the President's Cup on November 1st.
- Steps to obtain UNESCO Cultural Heritage Status for the boat race in Kerala.
- Ponnani and Thankassery to be included in the heritage project in 2019-20.
- Construction of Coastal Highway, having cycle track, connecting all the port cities in Kerala
- Kerala Tourism Entrepreneurship Fund to be provided to educated entrepreneurs who put forward novel ideas, projects or remedial measures.
- Fund to protect private buildings having tourism potential and also to encourage private entrepreneurs for providing basic infrastructure.

2.4.5 Budget Speech 2020 -21

- Financial assistance to 'Jalamelas' which do not come under Kerala Boat League.
- 'Ormatheruvu' project focused on erstwhile Gujarati regions
- Conservation activities of heritage mansions constructed in 19th century including Churches/Mosques/Temples educational-health-commercial institutions
- Project to be formulated with the co-operation of Devaswom Board for the renovation of temples in its antiquity, facing ruin and having architectural beauty like that of Mahadeva Temple at Koothattukulam.
- Pilgrim tourist circuit to be envisaged by the name, "Thatwamasi".
- Travancore Heritage Scheme.
- An autonomous Hotel Management College with International standards to be started at Dharmadam.

2.4.6 Budget Speech 2021 -22

- Train journey at Munnar to be revived as tourist attraction.
- Kerala Tourism Workers Welfare Fund Board to be established.

2.4.7 Revised Budget Speech 2021 -22

- Loan through Kerala Financial Corporation (KFC) for mobilizing more working capital in the Tourism Sector.
- Amphibian vehicles to be launched in Kollam, Kochi, Thalassery regions as first phase.
- Malabar Literary Circuit connecting Thunjan Memorial, Beypore, Thasrak, Ponnani, Trithala and banks of Bharathapuzha that became famous through Thunjath Ezhuthachan, Vaikom Muhammed Basheer, O. V. Vijayan and M.T. Vasudevan Nair respectively.
- Biodiversity Circuit connecting the places such as Ashtamudi Lake, Munroethuruth, Kottarakara, Meenpidipara, Muttara, Maruthimala, Jadayu Rock, Thenmala and Achancovil in Kollam District.

2.5 13th Five Year Plan

The approach of 13th Five year Plan was mainly based on the Kerala Tourism Policy of 2017. The Plan emphasised that tourism must cater to all sections of tourists, ranging from luxury tourism through lower income family tourists to back packers. It thus demanded for a new growth strategy for the sector: double the arrival of foreign tourists, increase the arrival of domestic tourists by 50% and creation of 400,000 jobs. To increase the arrival of tourists, seeing the importance of active marketing and promotion, imbalance in plan allocation between destination development and tourism promotion in earlier plans was corrected by raising share of tourist promotion to at least 1/3 of allocation. The Plan also identified that tourism cannot be successful without concurrent developments in health, sanitation, urban and rural planning, transport, connectivity, Local Self-Government and other spheres.

The focus of 13th Five Year Plan was to address the challenges by adopting new strategies, setting up new objectives, getting new sense of direction and so on. The main focus was on increasing employment opportunities and tourist arrivals through introduction/strengthening of tourism products, human resource development, responsible tourism, etc. More focus was also given on Government support through the involvement of other departments in tourist activities and on human resource development for the sector.

The major strategies adopted for the Plan include the following:

- Providing quality infrastructure and facilities at destinations.
- Focusing on new products such as Kochi Muziris Biennale, Spice Route, Eco-adventure etc.
- Utilizing the potential of tourism development in Malabar.
- Adopting new sense of direction by refreshing the brand and making it more appealing, exciting, and desirable to all traveller segments.
- Strengthening existing markets along with the exploration of new markets.
- Attracting new visitor segments including young travellers, adventure groups, honeymoon and family.
- Ensuring Community participation at destinations

A. Table 1 Financial Achievement of Tourism sector in the 13th Five Year Plan

Year	Outlay (Rs.in crore)	Expenditure (Rs.in crore)	%
2017-18	342.73	308.32	90.00
2018-19	379.00	289.31	76.00
2019-20	372.37	192.62	52.00
2020-21	320.14	311.89	97.42
2021-22	320.14	244.54	76.39

Source: Accounts, Plan Space Kerala

B. Major schemes/programmes undertaken

1. Infrastructure Development Schemes

- Upgradation, creation of infrastructure Amenities - To build resilient infrastructure in destinations and launch of new tourism products
- District Tourism Promotion Councils (DTPC) and Destination Management Council (DMC) - Development and marketing of local products through public/private participation, improvement of quality/standards and evolving procedure for certification of tourism products, advising and managing the destinations and tourism products.
- Kerala Tourism Development Corporation (KTDC) - upgradation projects including capacity enhancement in the existing hotels in major tourist destinations
- Upgradation, Creation of Infrastructure and Amenities at Guest Houses - envisages renovation, modernization and upgradation of Guest houses and Yathri Nivases
- Kerala Tourism Infrastructure Ltd (KTIL) - projects/activities to build essential

infrastructure related to tourism activities as well as to serve as an investment facilitation agency of the tourism department

- Bekal Resort Development Corporation (BRDC) – To develop destinations and products in Bekal and adjoining areas.

2. Marketing

- International and National promotional campaigns, Branding, Partnerships and Collaterals to retain market supremacy.

3. Human Resource Development Programmes

- KITTS, SIHM, FCI – Works in capacity building, academic and skilling in Travel and Tourism, Hospitality and Food Crafts

4. Conservation, Preservation and Promotion of Heritage, Environment and Culture

- Promote traditional fairs, Nishagandhi Dance & Music Festival and local cultural programmes and Kochi Muziris Biennale

5. Responsible Tourism (RT) Mission

- Responsible Tourism (RT) is a pro-poor tourism approach initiated by the Tourism Department in 2008. RT Mission was created with the objective of implementing responsible tourism activities in the entire state on a mission mode.

6. Ecotourism

- Develop new ecotourism destinations, strengthen existing destinations and new ecotourism products in forest and protected areas

7. Heritage and Spice Route projects

- Notable initiatives focused on developing destinations like Muziris, Thalassery, Alappuzha Heritage circuits and Spice Route. Travancore Heritage Circuit has been newly added

8. Champions Boat League

- A novel venture the “Champions Boat League” (CBL) on the model of the Indian Premier League (IPL) to transform the State’s legendary and historically-significant “Vallamkali” (snake boat races) into a world-class sporting event.

C. Highlights of the major achievements of Tourism sector during 13th FYP

- 1. Tourist arrivals:** After the 2018 floods, the tourism sector rebounded strongly in 2019 and witnessed the highest growth rate in domestic and foreign tourist arrivals in the last 24 years. There was 8.52 per cent growth in foreign tourist arrivals and 17.81 per cent growth in domestic tourist arrivals in the State in 2019 than 2018.
- 2. New Tourism Policy 2017:** Ensuring tourist-friendly, secure and safe destinations, formation of Kerala Tourism Regulatory Authority (KTRA), development of tourism projects of international standards in selected destinations through PPP mode, addressing key issues of the tourism industry such as waste management, initiating concerted efforts to tackle issues of connectivity to Kerala from major parts of the domestic and international markets, formulation of Kerala Tourism Entrepreneurship Fund (KTEF), preparation of action plan for sustainable tourism development.
- 3. Champions Boat League:** As part of a novel venture to protect and promote the tradi-

tion of the land, Kerala Tourism has launched the Champions Boat League. The main objectives of the event are conservation and promotion of Kerala's traditional festivals, to create an annual event to be marketed as a tourism product and to showcase backwaters of Kerala to the world. It has been conceived on the model of the Indian Premier League to transform the State's legendary and historically-significant vallamkali (snake boat race) into a world-class sporting event.

4. **Jatayu Earth Centre Project:** Jatayu Earth Centre, a unique combination of all aspects of tourism is the first major Build –Operate–Transfer tourism project in the State which offers a complete Kerala, God's own country experience to every tourist. The project is spread over 65 acres of multi-terrain landscape at Jadayupara near Chadayamangalam in Kollam District. The Jatayu Adventure Centre offers the largest adventure park within a natural terrain. Paintball, valley crossing, bouldering, zip line, trekking, archery, rappelling, and wall climbing are among the myriad activities available in the centre. It is a unique combination of artistry, mythology, technology, culture, adventure, leisure, and wellness.
5. **Responsible Tourism (RT) Mission:** A unique initiative of the department that has caught the attention of the world. At present there are 17008 individual/ group units (out of which 13567 women owned/led units) registered with RT Mission and 92980 local community members are directly or indirectly linked with tourism and generating income. The registered units of RT Mission generated Rs.25.50 crore from the formation of the Mission. 850 families are linked with the Experiential Tour Packages of RT Mission; 60 packages are operational. RT Mission launched Clean Kerala Initiative to keep prime tourism spots across the state, plastic and garbage free. As part of the Kuttanad Package second phase, various tourism projects are getting expanded to the Kuttanad project area. Aimanam Village which comes under the Kuttanad project area has been declared as the first Model RT Village. The Model RT Village project of RT Mission aims to develop a village as responsible tourism village with 100 per cent support of LSG and local community. Out of the 13 villages selected for the implementation of Model RT Village project, Aimanam is the one which successfully implemented all the activities for a Model RT Village.
Responsible Tourism (RT) Mission is implementing responsible tourism activities across the State and the Mission activities have received worldwide appreciations and recognitions and Kerala Tourism received many awards for the Responsible Tourism Mission activities.
6. **Barrier free tourism project:** The first phase of the project was able to make 70 destinations across the state disabled and elderly friendly.
7. **IT initiatives:** The IT initiatives of Department was able to get a far reach across the globe in placing Kerala as a major destination in the world tourism map
 - Kerala Tourism's Facebook page (more than 37 lakh followers), Instagram account (more than 3 lakh followers), and Twitter account (19 lakh followers) occupy first position in India.
 - Prepared e-catalogue for Kerala tourism videos.

- YouTube channel with more than 3 crore subscribers
 - Geotagged mobile camera photographs for QR code
 - Developed Kerala tourism Microsites based on particular themes
 - 1575 accommodation units were listed in the website of Kerala tourism with an independent page for each of the major properties and tour operators.
- 8. New and innovative marketing campaigns:** In order to retain market supremacy, Kerala Tourism launched innovative marketing campaigns like digital and social media campaigns that resulted in attracting more visitors. The major campaigns include the following
- Human by Nature Campaign: Internationally acclaimed campaign which showcased the culture and daily life of the people of Kerala and the strategy behind the campaign was the revival of the tourism sector that had suffered in the wake of 2018 flood and the outbreak of Nipah virus. About 3.10 crore people watched this campaign online.
 - Advertisement campaign to promote tourism in the off season “Come Out and Play.”
 - Biennale Promotion Campaign
 - Kerala Blog Express
- 9. Emphasis on developing infrastructure in the northern region:** This included infrastructure projects for developing basic amenities, information centres, and infrastructure for land and water-based adventure tourism. Small and Medium Industries Leveraging Experiential Tourism (SMiLE) project implemented by Bekal Resort Development Corporation (BRDC) aimed to promote and facilitate tourism based small and medium entrepreneurial ventures. The project have resulted in creation of 93 new entrepreneurs of which around 30 per cent are women entrepreneurs, and opening of 50 units with accommodation for 400 tourists.
- 10. Covid Loss Assistance Scheme:** The Government announced schemes to support the stakeholders in the tourism industry for the revival of the tourism sector in the wake of Covid-19. The Chief Minister’s Tourism Loan Assistance Scheme (CMTLAS) was announced in a bid to support the State’s travel and tourism sector. While entrepreneurs/establishments in the travel and tourism sector can opt for Tourism Working Capital Support Scheme (TWCSS) to stay afloat, employees engaged in the industry can avail of short-term personal loans under Tourism Employment Support Scheme (TESS). Houseboats owners can make use of Tourism Houseboats Support Scheme (THSS) to get financial assistance for executing urgent repairs and maintenance to the assets. Under the Tourism Guides Support Scheme (TGSS), eligible tourist guides was announced to be given a one-time financial assistance.
- 11. Infrastructure Development Projects:**
The details of infrastructure projects implemented during the plan period are listed below:
- a. Inaugurated Miniature Railway at Veli, Kanakakkunnu Digital Museum showcasing history of Travancore, Light and sound show at Thenmala Ecotourism Centre, Renovation of Chalai market and Mittayitheruvu, Vagbhadanantha Park, Vellar Arts and Craft Village- a complete Art and Craft Village in South Kerala, operated by ULCCS,

has been completed and inaugurated, completed first phase of Panchalimedu tourism project at Idukki, second phase of Madavoorpada project, completed development works at Akkulam Children's Park - Phase 2, completed development works of Kollam Beach, inaugurated Veli Swimming Pool and park Development, Lower Sanatorium Ponmudi, Sangumukham Beach - Parking and Recreation hub, inaugurated Mayyanadu-Thanni Beach, Ashramam Walkway beautification in Kollam, completed and inaugurated Moolur Smarakom, Aranmula Tourism Project, Konni Elephant Museum, & Perunthenaruvi Tourism projects in Pathanamthitta. Completed Jaladarshan and Microsite, repair works of existing amenities, started the Ring Road works and Toilet Block work inside the beach Park by BRDC, Development of Back water Tourism Corridor at Kadinamkulam.

- b. New buildings for Food Craft Institute at Uduma and Kannur and completed construction of SIHM building at Kozhikode.
- c. Heritage Projects: notable projects focused on developing destinations were Muziris, Thalassery, and Alappuzha heritage circuits. The second phase of the Muziris Project is in final stage. Thalassery Project covers 3 districts and is divided into 4 circuits and total of 61 destinations are included under the project. Alappuzha Project – construction of Living Coir Museum, Coir Factory Museum, Coir History Museum, and Yawn Museum is nearing completion.
- d. Centrally Sponsored Schemes: Completed Pathanamthitta-Gavi-Wagamon-Thekkadi project under Swadesh Darshan Scheme, Sree Padmanabha Swami-Aranmula-Sabari-mala project under Spiritual Tourism Project and Development of Guruvayur Temple under Pilgrimage Rejuvenation and Spiritual Augmentation Drive (PRASAD) scheme.

12. Human Resources Development

- a. Initiated diploma courses in adventure tourism
- b. Development of web portals: Tourism Careers in and tourism and hospitality.
- c. 114 Regional and State-level tourism guides underwent training programmes conducted by Kerala Institute of Tourism and Travel Studies (KITTS)
- d. More than 80 per cent students from KITTS, State Institute of Hospitality Management (SIHM), and FCI got placement.
- e. Employment driven short term Skill development Programmes launched by KITTS with Technical Consultants and Industry Partners.

13. Ecotourism Development

- a. Expansion of ecotourism activities at Silent Valley and Meesapulimala
- b. Improvement of facilities for visitors at Thekkadi, Upgradation of Deer Rehabilitation Centre at Thenmala, Modernisation of tourism facilities at Eravikulam National Park, Modernisation of Amphitheatre at Thenmala

14. Initiatives by Kerala Tourism Infrastructure Ltd

- a. As part of converting Veli as a Tourism Hub, the construction of the Tourist Facility Centre and Convention Centre and conceptualisation of Urban Wetland Nature Park has been initiated
- b. Completed Tourist Facilitation Centres in Guruvayoor under Centrally Sponsored

Scheme 'PRASAD'

- c. Preparation of Tourism Infrastructure Investment Plan for North Malabar for planning systematic development of tourism infrastructure and investments for the next 30 years in the region
- d. The first phase of the project Development of Madavoorpara Tourism Zone co-ordinated by KTIL has been completed. KTIL has also been instrumental in planning further eco-friendly and conservational tourism initiatives at Ponmudi for which an initial discussion has already been held in co-operation with Forest Department.

15. Hospitality

The hospitality sector is completely a private owned activity in the State. Kerala Tourism Development Corporation (KTDC) is participating in the tourist hospitality sector, promoting sustainable tourism in the State. The department of tourism is having 24 guest houses, 4 Yathri Nivases and two Kerala Houses. Tourism Department has been creating and maintaining guest houses across the State and major cities outside Kerala.

D. Issues/Challenges

- The tourism industry is facing unprecedented losses due to COVID 19 pandemic
- Poor connectivity/ transport infra to the destinations within the State.
- Problems with respect to quality infrastructure facilities, toilets, accessible restroom facilities, waste management, safety measures
- Lack of structured tourism products /experiences
- Competition in market from neighboring States and countries like Sri Lanka /other Asian countries
- Inability to attract students with high academic and relevant skill sets for the tourism sector
- Public/private partnership in destinations/product/business development and investment attraction

E. Analysis of Tourism Sector during 13th Plan Period

The Covid Pandemic has seriously affected in achieving the targets proposed in the thirteenth plan for tourism development. However the first three years of the plan period has witnessed only 14.5% increase in foreign tourist arrivals and 39.56% increase in domestic tourist arrivals. The shortfall in achieving the targets, especially for foreign tourist arrivals, may be attributed partially to the pandemic. However this must be critically analysed and realistic targets and plans to be envisaged for the 14th Five Year Plan. Analysis of various tourism projects implemented in the state during the 13th Five Year Plan is as follows.

1. Adopt new sense of direction by refreshing the brand and making it more appealing

The natural calamities and pandemic during the period resulted in low tourist arrivals and there has been shift in the focus from refreshing the brand. Efforts were mainly on Post Flood PR campaigns as well as the Post Covid Reassurance Campaigns in the final years of plan period.

2. Focus on new products such as Kochi Muziris Biennale, Spice Route, Eco-Adventure

etc.

Special focus was given to Kochi Muziris Biennale and was successful in presenting a large-scale contemporary art survey exhibition titled 'Lokame Tharavadu' in five different venues in Alappuzha and Durbar Hall, Ernakulam in 2021. Sponsoring the 13th Annual Conference of the Adventure Tour Operators Association of India (ATOAI) and hosting it at Kerala was a strategic step towards developing Kerala as Eco - Adventure tourism destination. The water sports activities at Munroethuruthu, Kollam, Rock Climbing at Chingeri, Wayand, Kayaking centre at Kannur have been initiated as part of developing adventure tourism. Not much of new tourism products emerged during the period other than Champion's Boat League and Caravan Tourism.

3. Utilising the potential of tourism development in Malabar.

Preparation of Tourism Infrastructure Investment Plan for North Malabar for planning systematic development of tourism infrastructure and investments for the next 30 years in the region is an achievement. The major projects that came up in the Malabar region are the Malabar River Cruise Project, Thalassery Heritage project and the Beypore Project. Fam 2 Malabar programme inviting major tour operators from India is expected to bring in tourists to the region.

4. Providing quality infrastructure and facilities at destination

The plan period witnessed big leap in infrastructure by taking up more than 70 major infrastructure projects across the State. These projects are at different stages of completion. Some of the completed projects are not operational to the full extent. A thorough review of the sanctioned projects to be done to evaluate the hindrance of implementation and operationalisation of infrastructure projects. The success of Build -Operate-Transfer tourism project like the Jatayu Earth Centre opens door for similar projects in other destinations.

5. Strengthen existing markets along with exploration of new markets

The efforts to classify foreign market into core market, conventional market, emerging market and potential market has helped to adopt appropriate marketing strategies for each sector. There have been efforts to launch innovative marketing campaigns for destination as well as product specific campaigns. The digital marketing has been remarkably good with the statistics showing high number of followers and subscribers in social media platforms. Participation in international travel marts and trade fairs got curtailed to an extent with the Covid - 19 pandemic in the last two years.

6. Attract new visitor segments including young travellers, adventure groups, honeymoon and family

Kerala has been striving to create new products and sub brands to attract new strata of tourists to State. Promoting Kerala as destination for Honeymoon and Adventure Tourism are some of such initiatives. The rate of success of such initiatives has to be evaluated based on reliable data and using suitable statistical tools.

7. Community participation at destination

Responsible Tourism (RT) Mission was established to take forward and spread the initiative in a mission mode to the entire state giving emphasise on community participation.

Schemes like Participation for Planning and Empowerment through Responsible Tourism (PEPPER) was launched for sustainable development of destinations by bringing the local community also into its fold. The statistics provided by RT Mission shows high involvement of local community members in tourism sector with 17008 individual/ group units registered under them and 92,980 local community members directly or indirectly linked with tourism and generating income. Ecotourism activities spreading to new destinations also ensured increased participation of local community in tourism. The Small and Medium Industries Leveraging Experiential Tourism (SMiLE) project implemented by Bekal Resort Development Corporation (BRDC) has resulted in creation of 93 new entrepreneurs of which around 30 per cent are women entrepreneurs. It is a promising result from the RT and furtherance of the programme should be based on studies and results of the performance of the RT units. The level of involvement of local community members in various tourism initiatives, the earning out of them and forward and backward linkages of the initiatives are to be carefully examined.

8. Human Resource Development

New courses and employment driven skill development programmes were launched and training programmes for various stakeholders of the industry was provided during the plan period. Various institutes under Department of Tourism offering tourism and hospitality courses were able to successfully place their students in the industry. In order to enhance careers in tourism and hospitality industry web portal has been developed. There is reluctance among the student community to join tourism and hospitality related courses considering the seasonality and vulnerability of the industry and efforts need to be taken to create awareness among students on the career opportunities in the sector.

9. Hospitality sector

The hospitality sector is completely a private owned activity in the State. The sectors want specific financial packages which are crucial to do repairs for revival and make hotels ready to receive guests. The opening of the tourism sector and beaches recently gave much-needed relief to the hotels and restaurants in the state. However, the sector hasn't received the required boost as many of the hotels haven't begun their operations.

Although, the Government have approved two loan support schemes for tourism sector to provide support to tide over the crisis due to Covid 19 pandemic, these schemes were not produced the desired outcome because of the non-cooperation of banks.

A detailed look into the plan document and the strategies undertaken by various organisation reveals that the projects and programmes undertaken by the institutions does not exactly go hand in hand with the strategies and recommendations of the 13th plan.

CHAPTER 3

14TH FIVE YEAR PLAN – A STRATEGIC APPROACH FOR TOURISM

Kerala, known for its scenic beauty and diverse cultural products has been able to make a presence in the world tourism map as a prominent destination. The consistent marketing efforts of the Tourism Department has resulted in creating a unique brand image for the state in national and international markets. This is reflected in the steady growth in both domestic and international tourist arrivals as well as contribution of more than 10% to the GDP of the State. With four international airports in place, the state is well connected to the outside world in transportation sector. The entire stretch of Kerala is connected with good rail system as well as roads. The presence of Kerala Tourism Development Corporation and vibrant private entrepreneurs has ensured high quality accommodation. The Responsible Tourism initiative launched in 2007 is able to bring community linkage and sustainability to tourism development in the State.

In spite of the above positives, the state witness a declining growth rate in tourist arrivals in recent years, which could be attributed to issues that need close examination. There has been high dependence on few products like backwaters, ayurveda, etc. and absence of development of new product line. The presence of only very limited airline services from major parts of the domestic and international markets as well as poor connectivity to the destinations within the state is another hindering factor. Problems with respect to infrastructure facilities, waste management, safety measures etc. at the destinations add to the worries in providing quality services and visitor experience. This is further threatened by increasing competition from neighbouring states and countries especially from Sri Lanka and other Asian countries. The current Excise Policy has significantly hampered the development of MICE sector in the state. Another issue the state faces is the lack of qualified and skilled labour needed for the industry with issues in quality of academics as well as the industry's failure in retaining good talents within the state. The above situation was further worsened by the impact of COVID 19 pandemic.

It is in this context that the vision and objectives for the 14th Five Year Plan is formulated.

3.1 Vision:

To position Kerala Tourism as sustainable and responsible model by providing quality experience to tourists and enhanced economic benefits to the local communities with the intelligent engagement of all stakeholders.

3.2 Objectives:

- To upscale destinations for high quality visitor experience.
- To create unique, innovative and diverse products.
- To adopt sustainable practices in tourism development.
- To position Kerala as a vibrant destination in domestic and international market.
- To create a conducive environment for investment in tourism sector.
- To create a regulatory framework for tourism business.
- To develop skilled resources for tourism and hospitality sector.

- To develop innovative mechanisms for tourism data management.
- To promote PPP's in destinations/products/business development and investment attraction.
- To encourage repeat visitors by continually offering new and innovative tourism products.

3.3 Strategies:

The implementation strategies for 14th Five Year Plan has been prepared including the recommendations put forward by the five specific sub groups of working group in tourism. It focused on eight areas – Developing World Class Destinations, Creating Unique and Innovative Products, Adopting Sustainable Practices in Tourism, Positioning Kerala as a vibrant destination, Making Kerala a Tourism Investment Friendly destination, Regulatory Framework for Tourism Business, Developing Human Resources for Tourism and Hospitality Sector and Establishing mechanisms for Tourism Data Management. The strategies and action points discussed below are therefore structured under these broad heads. Previous State Tourism Policies, the Draft National Tourism Policy 2020, the recommendations put forward in the Kerala State Planning Board organised International Conference – Kerala Looks Ahead in February 2021, Tourism excerpts from Budget speeches during the last five years as well as Kerala Tourism News Letter since 2016 have been examined for developing the implementation strategies. Before going to the key areas mentioned above some general recommendations are put forward.

It is important that the current vision, mission, roles and responsibilities as well as organizational structure of Department of Tourism and its subsidiary organisations are revisited for the timely implementation of projects. New roles and responsibilities to organisations to be assigned based on visioning exercise. Priority shall be given in the 14th Five year Plan to do a visioning exercise of all the organisations under Department of Tourism towards this area and a separate fund shall be allocated for doing the exercise with the help of renowned management experts in the beginning of the first year of the Plan. Proposals with Time bound Action Programmes have to be prepared by different organisations based on this visioning exercise incorporating various action points put forward in this document under various heads as part of the working group discussions.

The status of the implementation of various projects has to be reviewed repeatedly by the concerned head of institutions and by Director, Department of Tourism by the end of the project period. To bring together tourism in it's various guises being undertaken by various government departments such as Hydel Tourism, Irrigation, Plantation Corporation etc.

A detailed analysis of projects/ programmes/ initiatives of Department of Tourism during 13th Five year Plan to be done in order to identify issues and challenges and suggest course corrections and new programmes. An integrated tourism planning, development and management mechanism at State, organisational destination and stakeholder levels to be institutionalised targeting the vision, mission and objectives of 14th Five Year Plan.

3.3.1 Developing World Class destinations

A Cabinet Committee on Tourism to be formed with Chief Minister as Chairman, Minister

for Tourism as Vice Chairman and Ministers of related line departments as members for the timely implementation of Tourism Development and Management plans which are vital to development of world class destinations.

A Task Force on Tourism Infrastructure Development may be constituted with Minister for Tourism as the Chairman, consisting of members of the tourism industry and representatives of line departments to enable the Tourism department to conceive projects that are relevant and important.

Tourism Department shall promote *Public Private Partnership (PPP)* models in destination management

Destination Planning, development and management with Business development and investment models - The Department shall develop and manage infrastructure for destinations in PPP model learning lessons from successful PPP model through a transparent process, thereby harnessing the efficiency and creativity of the private sector. The activities of PPP model for destination management can cover the upkeep of infrastructure facilities at the destinations, services like running tourism information centres, providing guides, ensuring clean toilets, providing allied destination activities. This would facilitate tourist access, enhance quality and efficiency and improve the destination experience. The department has also to develop a set of specific guidelines/instructions to make destinations women and differently abled friendly and also encourage women entrepreneurs by empowering them.

The Kerala Tourism Infrastructure Limited (KTIL) shall be the nodal agency for harnessing the PPP model for destination management, infrastructure/asset creation and provision for experiences and services. The clear role, responsibilities and structure of the DMCs/DTPC's shall be developed through visioning exercise.

In the next five years, the department shall focus on *Hub and Spoke model* of destination development. Twenty Five Tourism hubs to be developed across each districts of Kerala on PPP mode. Iconic structures to be developed in each hub so as to create a destination image. Hubs can be in existing established tourism destinations or new destinations, which has some sort of uniqueness. A hub to be connected with spokes - other nearby destinations or new destinations. Hubs to have infrastructure facilities like Tourism Information Centre, Reservation Facilities, Accommodation facilities including homestays, Cultural Centres to enjoy art shows, Restaurants offering local cuisines etc. Hop on Hop off services to be introduced connecting hubs and spokes in each district. The fund for infrastructure development in tourism would be prioritised for hub developments.

Transit Hub to be created in every one hour/50 km distance along the highways with facilities such as restaurant, toilets, souvenir shops, vehicle maintenance etc. Department of tourism may provide a specific design for the transit hubs so as to get a unique identity and to be built and operated on a PPP model.

During the 14th Five Year Plan, special focus has to be attached for *Malabar Tourism Development*. Malabar is known for its diverse natural and cultural resources that could be used for developing new and innovative tourism products. Malabar is blessed with natural

attractions such as wildlife sanctuaries like Malabar, Wayanad, Aralam, Kottiyoor, various beaches at Kasaragode, Kannur and Kozhikode, waterfalls like Soochipara, Kanthanpara, Chethalayam, Kakkayam, rivers like Chaliyar, Kabini, Kallayi, Valapattanam etc. The region is historically and culturally endowed with many monuments like Edakkal Caves, Bekal Fort, St. Angelo Fort, Thalassery Fort, Arakkal Palace, major temples like Thirunelli Temple, Ananathapura Lake Temple, Jain Temples at Sultan Bathery, the Urus of Beypore and many of the performing arts, music and wide variety of cuisines. On the infrastructure side, even though Malabar is having adequate road as well as the rail connectivity, there is still dearth in tourist arrivals to the region as well as lacunae in promoting Malabar as a major tourism destination. The Department shall prioritise the tourism developmental activities in Malabar region in the next five years. A Corpus fund shall be constituted for planning, development and implementation of innovative tourism projects/products in the area. Malabar should be developed rather than merely development of individual destinations and financial incentives/policy initiatives to attract investors needs to be evolved.

In the context of *UNWTO recognizing villages* across the world, tourism department along with panchayat may develop tourism in villages committed to the promotion and preservation of cultural heritage and sustainable development imbibing the principles of Sustainable Development Goals.

WE need to develop select cities in Kerala to become part of the *UNESCO Creative Cities Network (UCCN)* that supports the United Nations 2030 Agenda for Sustainable Development. This would strengthen cooperation with and among cities that have recognized creativity as a strategic factor of sustainable development as regard to economic, social, cultural and environmental aspects. The UCCN covers seven creative fields: Crafts and Folk Art, Design, Film, Gastronomy, Literature, Media Arts, and Music – For each of these specific factors, cities may be identified and developed accordingly.

Green Carpet Initiative with the 10 – point code of conduct for tourist destinations in Kerala launched in 2017 by Department of Tourism to be strictly implemented to build a sustainable destination management system through participations and partnerships. *Kerala Destination Classification system* to be developed and introduced imbibing the principles from Global Sustainable Tourism Council Destination (GSTC-D) Criteria.

Destination Ranking System to be introduced based on the above classification, which would motivate destinations to do better to improve the rank. Appropriate parameters for evaluation to be developed. These include Infrastructure, Experiences, Accommodations, adherence to eco-tourism principles, net positive impact on local community. Funding could also be based on this.

Grading system for wayside establishments providing facilities like toilets, parking bays and refreshment will be implemented as a means to assure quality.

Master plans for sustainable inland waterway tourism activities to be developed. Waterway shelters to be designed and water taxis to be launched for transportation. Disperse houseboat operation and cruise activities to relatively under used stretches and regions. Tourism

Department, in association with Irrigation Department may build infrastructure facilities like jetties, parking bays and boarding points that will enable backwater tourism operations in new areas. Develop water and land itineraries so travellers can travel one way on the water, and if necessary, return by land routes.

Hospitality - Steps to be taken to address the issue of shortage of rooms in destination. Tourism department shall enquire the possibilities of opening of guest houses, inspection bungalows of all departments to tourists. Promotion of caravans and caravan parks to be set up giving top priority to tourists' safety, security as well as hygiene. Efforts to be taken to promote chain of tiny home based projects, tented accommodation and glamping (glamorous camping) in the destinations. Agricultural and plantations should be allowed to open up their properties, or develop small new ones (maybe less than 1500 sq. ft) for tourism purposes

A designated committee of artists/designers/architects/other practitioners to be constituted to advice on artistic and aesthetic aspects of any public and infrastructural projects (For example in airports, bus shelters, water jetties and terminals, any transportation arrival and departure spaces, and any other public space).

Application of Information Technology - Artificial Intelligence, Virtual Reality, Augmented Reality, Robotics to be introduced to enhance the experience of tourists in the destinations. One stop solution for any tourism related queries shall be developed with the help of artificial intelligence.

The following action points to be mandatorily checked and verified before the start of tourist season by the Destination Management mechanism.

3.3.1.1 Clean and hygiene environment with scientific system for collection and management of solid waste

Under this, the following activities may be initiated; (i) ensure destinations are free from Plastic (ii) provide enough dustbins in the destination (iii) place awareness boards discouraging dumping wastes in road sides (iv) install Cameras for monitoring illegal waste dumping (v) provide information about people involved in illegal waste dumping to Destination Managers (vi) decentralised waste management mechanisms at households and establishments (vii) develop mechanisms for scientific waste management in the destination (viii) make cleanliness a part of our culture.

3.3.1.2 Well maintained public toilets

For this (i) encourage establishing more public toilets in the destination directly or through partnership with stakeholders of destination (ii) consider the options for private land as well as mobile toilets where there is limitation for land availability (iii) encourage options for private toilets in the destinations (iv) ensure public toilets are clean (v) awareness campaign for keeping toilets clean (vi) ensure the cleaning staff deputed do the function properly (vii) any laxity in cleaning may be brought to the notice of Destination Managers.

3.3.1.3 Improved accessibility, well maintained public lighting system, pathways, signage, tourist facilities and equipment

The following activities may be ensured (i) Accessibility to all including differently abled people (ii) quality access roads to the destination (iii) roads within destination are well maintained and cleaned properly (iv) maintenance and up-keep of byroads (v) pavements for pedestrians are in place (vi) provide facilities for short-trips within the destination ensuring authentic rates (vii) drainages are well maintained (viii) enough street lights are there in the destination as well as it works properly (ix) install signboards depicting directions, accommodation facilities, public places etc. using internationally accepted and recognised symbols and colour codes (x) the details given in the signboards are correct and has good visibility (xi) Ensure proper maintenance of signboards (xii) Ensure designated parking space for vehicles (xiii) Plan for controlled vehicular movement in the destination to avoid traffic congestion (xiv) Provide cloak room facilities for travellers (xv) provide dress changing rooms for tourists at beaches, waterfalls etc. (xvi) provide enough benches/seaters in the destination (xvii) communication facilities including paid wi-fi at the destination (xviii) first aid facility in the destination and service of ambulance (xix) make destinations women and child friendly.

3.3.1.4 Safe drinking water and food

(i) Good public water distribution system, (ii) make required arrangements with authorities when there is water scarcity (iii) conduct periodic testing of water provided by water distribution agencies (iv) install kiosks that provide safe drinking water for tourists (v) encourage boiled water for drinking (vi) ensure wells and ponds in the destination are clean (vii) ensure the restaurants in the destination have valid licenses from Commissionerate of Food Safety are the activities to be focussed.

3.3.1.5 Adoption of green principles and moving towards carbon neutrality

The activities to be focussed includes (i) create awareness on impacts of Climate Change (ii) encourage planting of trees in the destination (iii) avoid destroying trees or plants (iv) encourage eco-friendly constructions that takes care of minimum resource use (v) promote usage of resource saving devices and equipment by establishments and hotels (vi) encourage Alternate Energy sources and use of energy saving devices (vii) encourage use of electric/ battery operated vehicles as well as bicycle ride within the destinations (viii) ensure all tourism activities are eco-friendly.

3.3.1.6 Safety and security arrangements along with contingency response system

(i) Ensure prompt service of law enforcement agencies (ii) any law breaking issues need to be brought the notice of authorities (iii) ensure safety of women and child (iv) service of sufficient number of tourism police and life guards to be ensured (v) task force to be constituted against trafficking and all abuses including substance (vi) ensure safety of all tourism related amusement activities. (vii) special attention should be given on the safety of adventure activities as well as water-based activities. (viii) establish a contingency cell to address crisis management in the destinations and (ix) encourage use of appropriate technologies for achieving the objective etc to be ensured.

3.3.1.7 Facilities for authentic information, feedback and complaint redressal system

The activities to be focussed include establishing information centres that provide authentic

and latest information, exploring the possibilities of establishing 24 x 7 working information centres, establishing information kiosks using latest information technology facilities, establishing mechanisms for Tourist feedback system, establishing provision for complaint registering by tourists and ensuring complaints registered by tourists are addressed promptly.

3.3.1.8 Trained and responsible staff, volunteers and service providers with distinguishable name badges

Training for various stakeholders including Auto-Taxi drivers, Tourism Police, Life Guards, Life Saving Volunteers, Tour Guides, Tour Operators, Street vendors, Homestay/ Serviced villa providers, Houseboat owners/staff, Owners/Staff of Ayurveda Centres, Hotel Owners/Staff, Restaurant Owners/Staff, Tourism Information Assistant.

3.3.1.9 Community participation in planning, development, operation and management

Homestay/ Serviced villa business, Ethnic Restaurants, Entertainment Activities, Toilets, Parking Facilities, Drinking Water, Guiding, Village Life Experience Packages, Naturalists/ Interpreters, Various Service Facilities, Outsourcing jobs, Eco tourism, especially those from tribal communities adjoining forests etc are the areas where local community participation could be adopted.

3.3.1.10 Designated Destination Managers for effective co-ordination and management

Separate Destination Managers for each identified destination, co-ordination with different agencies for successful management of destination, taking stock of various issues at the destination and take appropriate steps, and making destinations better place for people to visit and people to live in etc can be looked into.

3.3.2 Creating Unique and Innovative Products

Creation of Iconic Structures across Kerala

Iconic structures to be created in at least 25 destinations in the State. The structure should reflect the culture of Kerala, the life and history and the heritage of the destination. The structure to be designed with the help of good architects and built by the Tourism department encouraging private entrepreneurs to invest. Instead of using cement, usage of traditional building designs, technologies, methods and materials may be promoted. Structure can have small theatres where traditional local art forms could be performed with nearby tented camps, where people can make their stay.

Tourism Circuits

Prioritise the completion of already announced heritage projects at Muziris, Spice Route, Alappuzha, Thalassery and Travancore. Heritage Villages to be established at least one in each district considering the heritage value of the region. Heritage Streets to be developed and popularised in cities where ancient evidences remain like Mithai Theruvu at Kozhikode, Fort Kochi and Mattancherry Market at Ernakulam, Thazhathangadi at Kottayam, Chalai Market at Thiruvananthapuram etc.

Heritage buildings in the entire State to be restored for regaining the past glory. Preservation works to be done with private participation rather than absolutely depending on Government

money. Measures to be taken to preserve the traditional Kerala House constructions like Nalukettu, Ettukettu, Illams etc. to be converted as homestays or other accommodation facilities. Government should come up with guidelines for refurbishment of such buildings and sites.

Annual Awards to be installed for owners who preserve the heritage building in the best way. A template, with the details of its name followed by its history should be kept near historical structures with tourism emblem and QR code to retrieve relevant information about the structure.

Light and Sound shows to be conceived in major heritage centres as an educational and entertainment programme. Dynamic Lighting of heritage structures to be implemented throughout the State.

Walking tours can be developed in heritage sites and cycle paths can be developed connecting various heritage structures in a site. Hop on hop off services in electrical vehicles to be implemented connecting various heritage structures in each circuit. Heritage train journey between Munnar and Top station can be considered. The possibility of reviving old ports for tourism purpose can be explored.

Malabar Literacy Circuit connecting places such as Thunjan Memorial, Beypore, Tharak, Ponnani, Trithala and the banks of Bharathapuzha to be encouraged. Biodiversity Circuit in each district connecting biodiversity spots/ecosystems limiting the number of tourists as educative package should be prioritised. Specific activities like trekking, birdwatching, wildlife photography can be developed for each circuit. Pilgrim Circuits in each district connecting pilgrim centres of different religions. Backwater circuits at Thiruvananthapuram, Kollam, Alappuzha, Kottayam and Kasaragode should be strengthened.

Cultural Tourism

Cultural Centres may be developed in all districts and these centres may be linked to international cultural agencies/embassies to conduct programmes. The old abandoned bridges/structures can be re-modelled into cultural centres following Kerala architecture is a better option to be considered. Public Works Department can take a lead role in this with Tourism Department.

Festival Grounds to be set up in all districts to conduct various festivals like music, dance, folk, crafts, literary, film, theatre, food, horticulture, science etc. and programmes to be organised every month for few days to make the state tourism friendly round the year. Festival calendar for a minimum 3 years to be published detailing the district wise programmes. Keralotsavam, a Maha Mela, showcasing traditional art forms of Kerala can be organized from October to April.

The Kochi-Muziris Biennale (Contemporary Art Biennale) currently happen once in two years, for a period of about 4 months. An Architecture/Design Biennale may be introduced to be held on alternating years, with the Art Biennale.

Separate thematic museums to be established in the state to showcase the diverse natural

and cultural heritage of the State. Village Life Experience packages to be broadened and promoted to cover all activities that are part of Kerala lifestyle and culture. Packages that connect visits to Kerala Kalamandalam, Margi etc. can be developed.

At least one performing arts centre in each district can be developed which will also act as a collation point for local artists, facilitate workshops etc

Health Tourism

Ayurveda and wellness sector activities are to be given priority and establish Kerala as its hub taking private sector into confidence. “Danwanthary Day” to be celebrated as Ayurveda Day and steps to be taken to capture the world attention. Medical Tourism to be encouraged in the State leveraging the high quality service and infrastructure provided by the Government as well as private sector in the medical sector.

Caravan Tourism

Caravan Tourism, whereby tourists can stay and relax in specially made vehicles to be promoted as new product of Kerala Tourism. Caravans can be single (rigid) or can be towed to another vehicle (towed/trailer) having a length of approximately 8.5 metres. Caravans with facilities like sofa cum bed, kitchen with equipment like refrigerator, oven, toilet facilities, air-conditioner, internet facility, charging ports etc to be encouraged. Tourism Department to provide investment subsidies/incentives and enabling policies to promote and drive caravan tourism. Caravan parks to be set up to park caravans during night/day time for the tourists to enjoy the destination. The caravan parks, which should have basic infrastructure facilities for tourists as well as caravan to be developed by public sector or in PPP mode.

Sports Tourism

An assessment of the sports facilities and potentials in the state has to be done. Tourism need to encourage hosting of international and national matches of popular games, sports events like National Games etc. and to celebrate National Sports Day and International days associated to sports like World Football Day, World Cricket Day, International Tennis Day, World Bicycle Day, etc. by organizing events as part of promoting sports tourism. For promoting sports events to entice visitors to the State, international and national sports star may be invited to the State. Day with sports star programme to be launched, so that visitors get the opportunity to interact with them. We need to identify the traditional games (naadan kalikal) of Kerala on regional basis and develop platforms to perform such games. Tourists may be encouraged to participate in such games.

Adventure Tourism

Master Plan to be developed for adventure tourism in the State. More investors can be encouraged into the sector through various incentive programmes.

Steps to be taken to promote land, water and air based eco-adventure tourism activities to attract tourists of all ages and abilities at identified locations in the State. A minimum of 10 to 15 locations to be identified in every district, each offering one or more sustainable outdoor adventure activities.

Big ticket products such as a trekking trail through the Western Ghats from Kasargode

to Thiruvananthapuram, MTB Championships, Malabar Kayaking Festival etc. to be launched to raise the profile of Kerala as an adventure tourism destination. These should be conducted as tourism products, rather than sporting events.

Unused urban land parcels can be leased out on PPP basis to offer soft adventure activities to city dwellers. Mountain Bike (MTB) pump tracks and cycling lanes alongside public roads can be setup with minimal investment to encourage this sport. Water based activities such as bamboo rafting, kayaking, SUP, Canoeing, Rowing, Sailing etc. to be operated in rivers and beaches. Vagamon to be developed as world class paragliding destination by developing a proper landing zone. Ancillary activities such as winch paragliding can also be operated here. Air activities like ballooning by providing loans/subsidies for capital investment can be encouraged.

Adventure tourism related training is comparatively expensive and steps need to be taken for subsidising skill based training programs for local youth. Training in water sports activities to be offered within the state by competent and recognized institutions authorized by the Government.

Efforts to be taken to test and certify experienced staff already working in the field and strictly implement Kerala Adventure and Activity Based Tourism Safety and Security guidelines and Camping Guidelines.

Eco Tourism

Steps needs to be taken to identify places having immense potential for ecotourism to attract tourists of all ages. These places have to be developed as ecotourism destinations giving emphasis to conservation and environmental education. The products such as trekking, bird watching trails etc has to be developed ensuring local community to benefit from ecotourism.

Water based Tourism

Priority to be given to organize the Kerala Boat League every year from October to March. Efforts to be taken to promote other Jalamelas and boat races organized in various districts of state as tourism products. Water sports competitions in white water rafting, kayaking, canoeing etc. to be organized in different destinations. International Boat Show to be organized in Kochi every year giving opportunity for investors to understand the new developments in boat technology as well as doing business.

Uru / Dhow based tourism to be promoted as a key product for Malabar Tourism Development. Maritime Museum to be setup in Beypore to demonstrate the history and culture of Uru as well as its role in people's life. Promotion of cruise ships/luxury Uru or dhow sail between identified ports along Kerala seacoast may be included.

Monsoon Tourism

Under this, traditional Rejuvenation Programmes and Spa therapies can be encouraged. Cuisines like "Karkidaka Kanji" that suites the season can be identified and promoted. Dancing in the rains, mud football as well as indoor activities like visit a museum, theatre etc can be developed for tourists.

MICE Tourism

Convention Centres of International Standards in proximity to top destinations in each district can be developed. Outdoor weddings and events to be promoted in the post Covid scenario.

Promotion of Local Souvenirs.

Efforts to be taken to develop destination specific souvenirs to serve a dual role of improving local economy and allowing visitors to take with them a memento of their visit. Tourism Department to support production and marketing of local Kerala souvenirs by making space available for Kerala souvenir shops in all tourism centres. One point contact for purchase of souvenirs to be established in each districts under DTTC/KTDC.

Promotion of Local Cuisine/Food fairs

Hoteliers and restaurants can be encouraged to provide local cuisine. Food Festivals on local cuisines to be arranged in each district every year. Ethnic food restaurants to be set up in every local bodies with the support of Kudumbashree. Efforts to be taken to encourage homestead farms to provide bistros and cafes to serve straight to the plate.

Night Life/Food streets

As part of Tourism, night shopping, night food festivals and night restaurants to be promoted. Efforts to be taken to extend bar and beer parlour timings to mid-night. Concept of food streets with food kiosks for experiencing variety cuisines to be developed.

Low Carbon Tourism Packages

Efforts to be taken to develop tourism packages that has minimum carbon footprint from tourist activities /tourism facilities. Accommodation to be arranged in properties that practices sustainable aspects like energy conservation, water conservation etc. Transportation to be made in battery operated/solar powered vehicles. Tourists to be engaged in activities like bird watching, mangrove visits, farm visits etc. Tourists to be involved in the conservation awareness programmes, celebrating conservation festivals like Van Mahotsav, Wildlife Week, Environment Day, protection activities like afforestation programmes, adoption of trees, animals etc.

3.3.3 Adopting Sustainable Practices in Tourism

Sustainable Tourism development in the State should be implemented following the principles from Convention and Biological Diversity (CBD) Guidelines on Biodiversity and Tourism development. Responsible Tourism and Ecotourism approaches with emphasis on Triple Bottom Line would be adopted for Sustainable tourism practices in the State. A comprehensive Green Protocol to be introduced for destinations in the backdrop of global warming and climate change. The Code of Conduct for Safe and Honourable Tourism to be made aware to tourism service providers and effectively implemented.

Responsible Tourism Classification guidelines to be developed for all service providers and classification to be done throughout the state. Revisit the Kerala Declaration on Responsible Tourism to take stock how effectively the recommendations have been implemented.

Awareness creation to be made among all stakeholders of tourism including students on

the need for sustainable tourism. Existing tourism destinations to be graded into categories based on the biodiversity, environmental vulnerability etc. and norms to be prepared for tourist activities based on vulnerability factor.

Carrying Capacity studies to be done for all destinations to regulate the tourist traffic taking into account environmental impact and also commercial viability of communities and investors dependent on the destination. Framework for Tourism Impact Assessment to be developed and impacts to be assessed by Destination Managers periodically.

Active involvement of Local Self Government (LSG) to be ensured in planning and development of tourism in destinations. Tourism development programmes to be integrated with other developmental activities of LSGs. Elected representatives of LSGs may be given training for integrated tourism development and preparing projects for promoting tourism.

Waste Management in destinations is a prime issue to be addressed. For effective waste management, the Destination managers should co-ordinate with LSGs. Efforts to be taken to ban disposable plastic in major destinations. Develop units that produce alternative to plastic in all destinations. In order to avoid waste dumping in empty land in destinations, LSGs may take initiative to plant vegetables/ fruit trees/ medicinal plants, flowering trees etc.

Energy efficiency and management - The usage of Energy and Water can be reduced in destinations following Green building protocols. Awareness to be created among tourism stakeholders on the new technologies available for reducing energy and water usage. Architects to ensure that energy efficient buildings are constructed for tourism purpose. Non-conventional energy sources to be promoted in destinations. Confirm that energy and water saving devices/equipment are used in destinations. Audits on energy usage and water usage to be done periodically in destinations. Miyawaki Forest Project to be launched at identified lands in tourism spots across the state. Encourage farming practices in fallow land to mobilise local sourcing by tourism industry.

Responsible tourism has been an alternative approach to mass tourism which had been prevailing since years. The visiting tourist shall have new experiences in his tourism journey at the grass root level with the interactive sessions with locally trained RT resource personnel through the ethnic cuisines, local livelihood activities, festivals, art forms, farm visits etc.

The following activities will ensure that local community from destinations get job/ revenue from tourism sector. Skill development training programmes based on the requirement of tourism industry to be given to local community members to make them fit for tourism jobs. Priority to be given for women in such training programmes so as ensure gender empowerment. Prepare LSG wise data bank of Tourism Service providers and update it from time to time to time. Kerala Agri Tourism Network, Ethnic Cuisine Network, RT Artist Network, Handicraft/ Souvenir Networks to be established in each LSG. In forest areas, tribal community members who have traditional knowledge about forests to be appointed as tourist guides. Minor forest produces like honey collected by tribal community shall be promoted to generate income for them.

Tourism Resource Mapping at LSG level to be done with community participation for development of new tourism products. Rural life styles, livelihood activities, tribal houses, medicines, food, handicrafts, local markets, performing arts of the community etc. may be developed as tourism products. Training of local traditional art forms to be given to local community so as to create cultural groups.

Responsible tourism clubs to be established to implement responsible tourism activities through volunteering. Sustainable Tourism conferences to be organized to take stock the development of new initiatives globally as well as to showcase our initiatives to the outside world.

Kerala became the Responsible Tourism Leader globally and created various sustainable and responsible tourism models which are accepted and appreciated worldwide. Not only Government sector is promoting RT, there are many RT practitioners in private sector also. Kerala proved that Responsible Tourism is a tool for Sustainable Tourism development.

3.3.4. Positioning Kerala as a vibrant destination

For effective marketing and promotional activities, constitution of Kerala Tourism Promotion Board with the participation of both the public and private sectors to be made mandatory.

During Covid period, there is wrong perception in the mind of people that travel to Kerala is unsafe and hence suitable marketing strategies should be evolved to overcome this. A message has to go that destination is safe, industry is fully vaccinated and destinations in Kerala are well prepared to overcome the pandemic and welcome the guests in terms of improvement in waste management, safety, medical facility etc. A Consultative Committee with tourism representatives and media to be constituted for providing positive messages on Kerala. A mechanism to constantly send positive messages to wider networks using social media platform to be established under Department of Tourism.

Marketing Strategies at National Level

More importance to be given for domestic market as it will take some time for international travel to become normal after the pandemic. Mini Kerala Travel Marts (KTMs) – buyer seller meet to be organised in South, Central and North Kerala inviting around 100 operators from different states. The tour operators to be given FAM trip to different destinations in the sub regions as part of mini KTMs to give them an experience of Kerala. Commercials to be released in Television, FM Radio, Music Streaming Channels, Over the Top (OTT) platforms in regional languages of different states.

Participate in all Tourism Trade Fairs across the country at least for one year to ensure continuous visibility of the State. For travel agents or tour operators in various states, Kerala is only one among many products and focus could be on community level marketing by which the clients ask for Kerala visit. Incentives to be given for accredited tour operators for bringing tourists from other State. Special attention to be given for bringing tourists to northern Kerala with the opening of Kannur International airport. Identify new destinations that are connected by flight to all international airports in Kerala and road shows to

be conducted in these destinations.

Marketing Strategies at International Level

Promotion of Kerala Travel Mart as one of the top international Travel Marts is an opportunity for Kerala Tourism to market overseas. Along with this, the State must participate in more travel fairs so that there is more visibility in international markets. We need to explore the possibilities of collaborative model of marketing with other countries. Short videos of less than two minutes to be produced focusing on the beauty of Kerala and this has to be reached to NRIs in various countries for sharing. High quality Tourism Magazines and short videos on Kerala to be provided in all international Flights.

New Marketing Strategies

The focus group for Marketing under Department of Tourism needs to review the current marketing strategies to identify how effective it has been. Market research to be done on destinations focusing connectivity, various segments to be targeted, measures to increase the length of stay, medium of promotion etc. For strengthening existing source markets, plans have to be developed. Year 2023 to be declared as Visit Kerala Year and the caption to be used in all marketing initiatives of Department of Tourism. Promotional Campaigns have to be initiated to declare Kerala as a safe destination. Familiarizing Kerala Campaign/Product Specific Campaigns to be launched in digital platforms like You Tube, Instagram, Facebook, Web Portals. Blogging and Vlogging to be encouraged for tourism promotion.

Innovative Campaigns to be developed in the model of Incredible India Campaign done at ITB in 2007, whereby the campaign used the entire city as a canvas - covering it with large billboards, branding on taxis and buses, vibrant graphic art and 3D installations. Virtual tours to be designed using virtual reality and augmented reality to attract tourists to the real location.

Grass root melas to be organised nationally and internationally to directly interact with the clients. B2C marketing to be increased in both Domestic and International Sector along with B2B. Marketing subsidies to be given for approved tour operators, homestays, houseboats etc. Efforts to be taken to provide a single message of togetherness of tourism stakeholders to the outside world.

3.3.5 Making Kerala a Tourism Investment Friendly destination

As more focus is given to development of destinations in North Kerala, investors need to be supported by the Government by giving subsidies like reduced electricity charges, Tax holidays for some years etc. Special Investment Schemes to be introduced for the development of infrastructure such as roads, water transport, electricity, drinking water, wayside amenities for destinations across the State.

Kerala Tourism Entrepreneurship Fund to be provided to those educated entrepreneurs who put forward novel ideas, projects or remedial measures. Kerala Tourism Workers Welfare Fund Board to be established to provide interest free loans for workers registered under the Board during pandemic/ disasters.

3.3.6 Regulatory Framework for Tourism Business

The aim is to develop a Resilient Tourism Policy for Kerala imbibing the principles from Global conventions and declarations on sustainability. The policy shall focus on (i) creating awareness on why tourism sector is vulnerable to disaster and climate risks (ii) imposing Mandatory vulnerability assessments of the destinations (iii) imposing restrictions to control the construction of hotels and resorts in Ecologically Sensitive Zones to resist natural calamities, flood etc. (iv) developing Tourism Resilient Index as a self-assessment tool for predicting whether individual tourism businesses and the regional tourism industry are prepared to maintain operations during and after disasters (v) Examining barriers to proactive mitigation and risk-informed decision-making and (vi) Capacity building of tourism stakeholders on mitigation aspects as well as developing/diversifying to disaster resilient tourism products.

Implementation of industry status will allow tourism sector to soar to new heights. Investor Facilitation Cell may be set up at Department of Tourism to facilitate investments and handhold the investors. Handle single window system to issue licenses for hospitality sector to facilitate business and investment. Creation of 'time bound permissions' that are granted within two months of submission of application can be thought off.

Tourism Department may be designated as the licensing authority for various tourism service providers in order to avoid multiple licensing by Local body and tourism department. The validity of all tourism licenses may be made five years from the date of issuance. For enabling ease of doing business, reforms to be made on land administration, transfer of land and property, land availability and allotment, environment registration, construction permit, labour regulation, utility permits, tax payments, contract enforcement and inspections.

Excise policy may be modified to accommodate the intent of Tourism sector. Tourism department may initiate discussions with Excise department and tourism stakeholders to address various issues and challenges faced by the tourism stakeholders and their views may be included in the excise policy which would enable the hospitality industry to run their business smoothly.

Bar License fee need to be reduced for 4 & 5 Star hotels to an affordable rate. Even-though the Bar hotels have paid a license fee, they have also to pay additional charges for serving liquor at Restaurant, Banquet hall, Roof garden, Pool side etc. These additional charges have to be lifted to support the stake holders.

Cost of liquor license to be reduced to be at par with or slightly higher than beer/wine license to incentivize more players to enter the market - Liquor license to be permitted for stand-alone establishments as opposed to only 3 Star Hotels so that existing barriers of entry to market are removed. This will allow more pubs and clubs to enter the market and also allow restaurants to serve alcohol along with their menu leading to entry of global restaurant chains.

Apart from the expensive bar license fee, the bar-hotel owners are also paying a big amount of tax while purchasing liquor and have to pay turn over tax after sales. These enormous additional expenses are not feasible to do a smooth business during the post pandemic

situation.

Other recommendations include licensing beer parlours in the form of beach shacks at all destinations focussing foreign tourists and permits for establishments to produce beer at locations to be allowed so as to allow entry of microbreweries into the market.

3.3.7 Developing Human Resources in Tourism and Hospitality Sector

A comprehensive study can be conducted to understand the demand and direction of the tourism sector, determine the key skill needs of the sector and identification of key constraints faced.

Kerala Tourism Development Corporation (KTDC) is participating in the tourist hospitality sector, promoting sustainable tourism in the State. Though hospitality is being promoted through Yatri Nivases and Guest Houses, its activities should also be strengthened and monitored.

Skill Development programmes to be launched immediately to address the shortage of (i) leadership and management skills, specifically practical management operations, financial and business management, and core people leadership skills (ii) communication and foreign language skills, which also includes an understanding of foreign cultures and business environments as well as intercultural competencies to address the increasing internationalization of the customer base and the workforce (iii) social skills and competences, which also extends to customer handling/service skills and knowledge (iv) Information Technology and Communication/Presentation (ICT), Numeracy and Financial Management skills.

Skill Certification Centre for Tourism and Hospitality can be launched under Department of Tourism. Skill training and refresher courses to be made mandatory for all staff of Department of Tourism and its subsidiary organisations as well as Department of Tourism approved Organisations. Social Media Marketing Skills, Language Courses, Creative business writing, Marketing - creating tourism materials, Handicrafts creation and design are the alternate skill development courses that can be introduced for generating employment at various levels for skilled, semi-skilled and unskilled people.

A Council for Quality Education System in Tourism (C-QUEST) can be launched to ensure quality education in tourism that meet the HR requirements of the industry. Programmes to enhance existing worker's skills through activities such as offseason skill enhancement training, employer sponsored skill development and promoting workplace learning and training. Special attention should be given to women empowerment and to introduce more women in to the industry. Steps to be taken to establish Kerala Tourism Culinary Institute to ensure the much needed man power in hospitality sector.

The following programmes can be initiated to revamp the system of tourism education to identify, nurture and develop the skills of students.

- Faculty Development Programmes to be made mandatory for tourism teachers to identify and nurture skill of students.
- Admission to higher education courses in tourism to be based on skill testing.

- Industry experts to be included in the Academic Council that approve syllabi at degree and post graduate courses in tourism.
- Compulsory six months/one year programme similar to that of house surgency for degree students that develop skill in tourism to award the degree.
- Skill Test to be made mandatory for Government sector jobs in tourism.

Exclusive portal for tourism professionals to register with authentic qualifications will give a clear idea about Kerala Tourism Human Resource and also help Government to provide incentives or job opportunities to the people in the industry.

3.3.8 Establishing mechanisms for Tourism Data Management

Tourism sector requires accurate data for information management. In Tourism sector data is now being collected increasingly from blogs, social media posts through the use of smart phones and other digital sources too. For proper planning, it is necessary to develop methodology for collecting accurate statistics on tourism aspects. While collecting statistics, use of Electronic ID Cards with Unique Identification Number for national and international tourists is helpful for avoiding duplication. Big data analysis to be used to extract information from social media and online sites to do predictive and behaviour analysis of customers identify potential gaps in the market.

In the post Covid scenario, Tourism department may develop an application to register stakeholders who have been vaccinated against COVID 19.

Considering the issues/challenges faced by Kerala Tourism and based on the recommendations of Working Group, the following tentative re-orientation of programmes is proposed

Table 2 Tentative re-orientation of programmes

Sl. No.	Sub Groups	13th Plan Allocation (%)	14th Plan Allocation (%)
1	Infrastructure and destination development	45.00	39.00
2	Promotion and marketing	32.50	39.00
3	Human resource development	10.00	10.00
4	Hospitality	7.50	5.00
5	Incentives to Private Sector	5.00	7.00

3.3.9. Conclusion

A robust integrated Tourism planning, development and management mechanism involving State, Tourism Department, Tourism agencies/organisation, industry stakeholders and others needs to be structured for fulfilling the 14th plan vision including objectives.

APPENDIX-1

PROCEEDINGS OF THE MEMBER SECRETARY STATE PLANNING BOARD

(Present: Sri. Teeka Ram Meena IAS)

Sub: - Formulation of Fourteenth Five Year Plan (2022-27) – Constitution of Working Group on **Tourism Sector** – reg.

Read: 1. Note No. 297/2021/PCD/SPB dated: 27/08/2021
2. Guidelines on Working Groups

ORDER No:951/2021/I&I/SPB/RO2(W.G 6) Dated: 16/09/2021

As part of the formulation of Fourteenth Five Year Plan, it has been decided to constitute various Working Group under the priority sectors. Accordingly, the Working Group on **Tourism Sector** is here by constituted with the following members. The Working Group shall also take into consideration the guidelines read 2nd above in fulfilling the tasks outlined in the Terms of Reference (ToR) for the Group.

Co - Chairpersons

1. Dr. Venu V., IAS, Additional Chief Secretary, Tourism, venu@nic.in 9560407263
2. Sri. Baby Mathew, Chairman and Managing Director, Somatheeram Ayurveda Group cmd@somatheeram.in 9895636363

Members

1. Smt. Rani George IAS, Principal Secretary to Govt. (Cultural Affairs) secy.ca@kerala.gov.in, secretaryculture8002@gmail.com 9447753565
2. Sri. V. R. Krishna Teja IAS, Director, Tourism, director@keralatourism.org 8498811111
3. Sri. Arun R.S IFS, Director, Eco Tourism, Department of Tourism, ecotourism@keralatourism.org 9447979022
4. Dr. Rajasree Ajith, Director, Kerala Institute of Tourism and Travel Studies (KITTS) director@kitts.edu 9847064813
5. Sri. Rupesh Kumar K, State Mission Coordinator, Responsible Tourism, rupesh@rtkerala.com 7025125285
6. Prof. Saroop Roy B.R., Asst. Professor & Co-ordinator, Centre for Responsible Tourism Kerala Institute of Tourism and Travel Studies (KITTS), sarooproy@kitts.edu.org 9447079763
7. Sri. Gopinath Parayil (Gopi), Founder of The Blue Yonder, gopi@theblueyonder.com 9047523960
8. Dr. Benny Kuriakose, Conservation Consultant, Muziris Heritage Project. benny@bennykuriakose.com 9444388779
9. Sri. Jose Dominic, Director and Co-Founder, CGH Earth, josedominic@cghearth.com 9847063754
10. Sri. Bose Krishnamachary, Founder member and President of Kochi Biennale Foundation. bosekrish@kochimuzirisbiennale.org 9821412889

11. Sri. E.M. Najeeb, Chairman and Managing Director, Air Travel Enterprises Group of Companies, Senior Vice President, Indian Association of Tour Operators, emnajeeb@ategroup.org, emnajeeb@atetravel.com, 9846063767
12. Sri. Anish Kumar P. K, CEO, The Travel Planners, Executive Member, The Association of Tourism Trade Organizations India (ATTOI) anish@ttpkerala.com, 9447051702
13. Sri. Jose Pradeep, Secretary, Kerala Travel Mart, India's largest tourism buyer- seller mart, jpyuvarani@gmail.com 9846055737
14. Sri. Pradeep Moorthy, Managing Director, Muddy Boots, pradeep@muddyboots.in 9544200208
15. Sri. Sajeev Kurup, Managing Director, Ayurvedamana, 9846045696 sajeevkv@gmail.com
16. Sri. Vancheeswaran G, President, Wayanad Tourism Organisation (WTO) 9744541203 info@nomadthetraveller.com
17. Sri. Abraham George, Chairman and Managing Director, Intersight Tours & Travels 9349757001 / 9349757003 md@intersight.in 0484-4056222, 4056211
18. Sri. Kaushiq Kodithodika, Managing Director, Jellyfish Water Sports Private Limited, kaushiq@hotmail.com
19. Sri. K.R. Pramod, Assistant General Manager, Mathrubhumi Group, krpramo@gmail.com 9847006676
20. Sri. Satheesh S, Vice Chairman, Kerala State Youth Welfare Board, 9496083629, satheesh1980vs@gmail.com

Convener

Er. Joy N. R., Chief, Industry and Infrastructure Division, State Planning Board, chiefindustry@gmail.com, joynr_spb.ker@nic.in, chiefindustry.spb@kerala.gov.in, Mob: 9447000868

Co- Convener

Smt. Dhanya Chandrasekhar, Research Officer, Industry & Infrastructure Division, State Planning Board, 9447819216, dhanyasekhar@gmail.com

Terms of Reference

1. To outline special problems pertaining to the tourism sector; and suggest a formal mechanism to develop the tourism ecosystem within the Districts and the State.
2. To suggest, in particular, a set of innovative programmes/projects which can be undertaken during the 14th Plan period; and explore new avenues and opportunities in the sector.
3. To suggest policy/innovative initiatives in various functional areas to drive the tourism ecosystem within Districts and State.

Terms of Reference (General)

1. The non-official members (and invitees) of the Working Group will be entitled to travelling allowances as per existing government norms. The Class I Officers of GoI will be entitled to travelling allowances as per rules if reimbursement is not allowed from Departments.

2. The expenditure towards TA, DA and Honorarium will be met from the following Head of Account of the State Planning Board “3451-00-101-93”- Preparation of Plans and Conduct of Surveys and Studies.

(Sd/-)

Member Secretary

To

The Members concerned

Copy to

PS to VC

PA to MS

CA to Member (SGK)

Sr. A.O, SPB

The Accountant General, Kerala

Finance Officer, SPB

Publication Officer, SPB

Sub Treasury, Vellayambalam

Accounts Section

File/Stock File

Forwarded by Order

Sd/-

Chief, Industry & Infrastructure Division

(Convener)

APPENDIX 2.

14th Five Year Plan (2022-27) Working Group on Tourism - Sub Groups

Sl. No	Sub Groups	Members
1	Developing World Class Destinations Up scaling existing destinations Developing new destinations Disaster Resilient Infrastructure Destination Management	Sri. V.R Krishna Teja IAS (co-ordinator) Sri. Anish Kumar P.K Dr. Benny Kuriakose Sri. Satheesh S
2	Creating New/Innovative /Products Heritage, Culture, Hill Stations, Beach, Forest & Wild Life, Backwater, Adventure, Health, Pilgrim, Culinary, Village, Festivals, Farm, Leisure etc	Sri. Arun R.S IFS (co-ordinator) Sri. Bose Krishnamachary Sri. Kaushiq Kodithodika Sri. Sajeev Kurup
3	Sustainable Tourism Responsible Tourism Participatory Tourism activities Resilient tourism approaches	Sri. Rupesh Kumar K (co-ordinator) Sri. Gopinath Parayil Sri. Vancheeswaran G Sri. Pradeep Murthy
4	Marketing and Promotion Direct, Indirect, Digital National, International New marketing strategies Post pandemic approach	Prof. Saroop Roy B.R (co-ordinator) Sri. E. M. Najeeb Sri. Abraham George Sri. K.R. Pramod
5	Regulatory framework & HR Policies for ease of doing business Disaster resilient tourism Skill development and employment Tourism Investments and Financing Tourism Data Management	Smt. Rani George IAS Dr. Rajasree Ajith (co-ordinator) Sri. Jose Dominic Sri. Jose Pradeep