



**HOTELIVATE**  
ELEVATION THROUGH INNOVATION

IN ASSOCIATION WITH

**WORLD  
TRAVEL &  
TOURISM  
COUNCIL**  
INDIA INITIATIVE

**Manav Thadani, MRICS**  
Founder Chairman, Hotelivate

**Karan Kapoor**  
Associate - Strategic Advisory, Hotelivate

# 2019 INDIA STATE RANKING SURVEY



## Introduction

The India State Ranking Survey by Hotelivate in association with the World Travel and Tourism Council – India Initiative (WTTICII), is a biennial publication that assesses the relative competitiveness of the nation's 30 states in terms of Travel & Tourism potential across 12 identified parameters. This is the sixth edition of the publication since its inception in 2009.

One of the most vast and diverse countries in the world, India presently ranks 34 out of 140 economies in terms of Travel & Tourism Competitiveness, largely on the back of its rich natural and cultural resources, strong price competitiveness, international openness (visa requirements, bilateral air service agreements and regional trade agreements), transportation infrastructure and business environment. However, areas of overall Travel & Tourism policy, tourist service infrastructure (including hotels), safety and security, health and hygiene, information & communication technology (ICT) readiness, and environmental sustainability continue to be in need for significant improvement.<sup>1</sup> The Prime Minister in his independence day speech this year acknowledged that many destinations within the country with high tourism potential do not have the most basic tourism infrastructure; yet, he urged all the citizens of India to visit at least 15 destinations across the country before 2022 citing that the increase in visitations will boost tourism and contribute to the destination's local economy, ultimately resulting in an improvement in infrastructure.

In terms of tourist arrivals, a total of 1.4 billion international arrivals were recorded in 2018 globally, of which 25% were to the Asia Pacific (approximately 348 million).<sup>2</sup> India received 10.56 million international tourist arrivals (excl. NRIs), accounting for 3% of Asia Pacific and 0.75% of the global tourist arrivals.

**FIGURE 1: ASIA PACIFIC – INTERNATIONAL TOURIST ARRIVALS (2018)**

Sub Region	International Tourist Arrivals (million)	Market Share
Asia Pacific (APAC)	347.7	24.8%
North East Asia	169.2	12.1%
South East Asia	128.7	9.2%
South Asia	32.8	2.3%
Oceania	17.0	1.2%

Source: International Tourism Highlights 2019, UNWTO

India's Travel & Tourism GDP stood at US\$247 billion in 2018, growing at 6.7% over the previous year. This growth was largely driven by domestic spending which constitutes 87% of the direct Travel & Tourism GDP – a trend that has been fuelled by improved regional connectivity, rising spending power of the middle-income population, proliferation of low-cost carriers, weakening of the Indian Rupee (that makes domestic holidays more attractive than international ones), and active participation of the industry.<sup>3</sup>

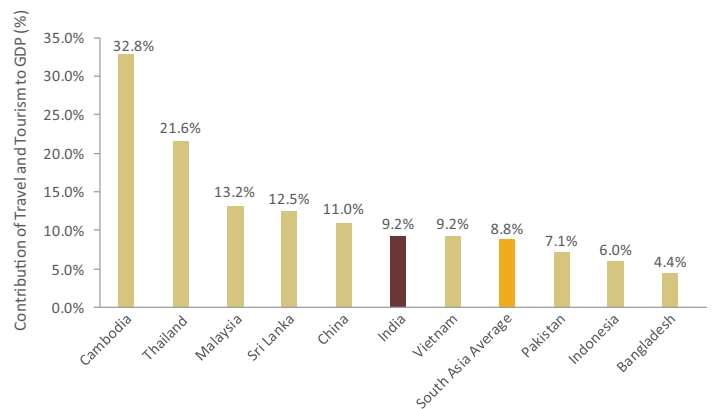
In addition, Travel & Tourism generated nearly 43 million jobs in India last year (direct and indirect); with only China (around 80 million total jobs) surpassing it in the Asia Pacific region. It is forecasted that the sector will support 53 million jobs over the next 10 years. From an investment standpoint, Travel & Tourism attracted around US\$46 billion in 2018; though this ranks second in the Asia Pacific region, it lags China's Travel & Tourism capital investment of US\$162 billion, by far.<sup>3</sup>

To sum it up in metaphoric terms, India's Travel & Tourism economy is a mixed bag with sweet candies and sour punks. Though it has improved in several aspects over the years, the country still needs to overcome many

challenges and grab opportunities within its reach in order to establish itself as an influential tourist destination in the world.

Figure 2 highlights India's standing vis-à-vis other Asia Pacific countries in terms of total contribution of Travel & Tourism to GDP.

**FIGURE 2: ASIA PACIFIC – RELATIVE TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP (2018)**



Source: India Economic Impact Report 2019, WTTIC

The Travel & Tourism industry consists of multiple verticals that include hotels, airlines, and travel and tour companies. The India State Ranking Survey focuses on the first vertical and aims to identify the best performing states in the country from the hospitality industry's viewpoint. In order to meet this objective, we have employed 12 key parameters or criteria for evaluating the performance of different states. While some parameters apply specifically to hotel developers, others are more relevant for state governments.

It must be noted that in addition to the 11 parameters used in the last survey, we have included Green Cover as a parameter this year to assess the environmental sustainability of the states. Moreover, the data for all parameters has been collected from various reliable sources to derive the state rankings; the methodology employed has been discussed in greater detail later in this report.

Figure 3 outlines the sample set of states covered in this survey. It is to be noted that since the State Ranking Survey is conducted based on the most recent data available and measures progress and development over the past two years, we have taken Jammu & Kashmir as a state in this edition. Going forward, as per the state's recent transition into two union territories, the survey in 2021 will accommodate this change.

**FIGURE 3: DEFINED SAMPLE SET OF STATES**

1) Andhra Pradesh	11) Jammu & Kashmir	21) Odisha
2) Arunachal Pradesh	12) Jharkhand	22) Punjab
3) Assam	13) Karnataka	23) Rajasthan
4) Bihar	14) Kerala	24) Sikkim
5) Chhattisgarh	15) Madhya Pradesh	25) Tamil Nadu
6) Delhi*	16) Maharashtra	26) Telangana
7) Goa	17) Manipur	27) Tripura
8) Gujarat	18) Meghalaya	28) Uttar Pradesh
9) Haryana	19) Mizoram	29) Uttarakhand
10) Himachal Pradesh	20) Nagaland	30) West Bengal

\*Does not include Gurugram, NOIDA, Greater NOIDA, Ghaziabad and Faridabad

<sup>1</sup>The Travel & Tourism Competitiveness Report 2019, World Economic Forum

<sup>2</sup>International Tourism Highlights 2019, UNWTO

<sup>3</sup>India Economic Impact Report 2019, WTTIC



Figure 4 presents the 12 identified parameters and their respective assigned weightages corresponding to their individual impact on the hospitality industry.

FIGURE 4: IDENTIFIED PARAMETERS AND ASSIGNED WEIGHTS

Parameters	Assigned Weight	Impact
Tourist Visits	30	High
State Expenditure on Tourism	25	High
Green Cover	20	High
Presence of Branded Hotel Rooms	10	Medium
GSDP Per Capita	10	Medium
Effectiveness of Marketing Campaign	10	Medium
Urbanisation	10	Medium
Road and Railway Infrastructure	10	Medium
Aircraft Movement	10	Medium
Literacy Rate	5	Low
Ease of Doing Business	10	Medium
Intangible Aspects	15	Medium
<b>Total</b>	<b>165</b>	

## Hotel Taxation

In the last edition of the report, we had presented a variance between GST and the erstwhile Luxury Tax on hotels and highlighted some of the benefits as well as disadvantages of GST. Particularly, we discussed how the definition of Luxury Hotels “as being priced at ₹7,500 and above” can negatively impact the industry, constricting demand and growth for many properties that aren't truly positioned in the luxury space. Since then, many industry experts and state level tourism ministries have expressed their concern and advocated the central government to amend the four-tier tax slab in order to boost the tourism sector. Eventually, in September 2019, the central government amended taxes on various products and services, including hotels, providing a huge relief to the industry (Figure 5).

FIGURE 5: GOODS AND SERVICES TAX SLABS

Room Rates	Erstwhile GST%	Revised GST%
Below ₹1,000	0%	0%
₹1,000 - ₹2,500	12%	12%
₹2,500 - ₹7500	18%	12%
₹7,500 and above	28%	18%

Source: Hotelivate Research

The government's move to do away with the four-tier tax slab and slashing of rates is certainly a step in the right direction; demand is likely to get a boost which in turn could provide an impetus for average rates to follow, subject to myriad other market forces that determine the performance of hotels. With this favourable change, India is now in a better position to compete with various neighbouring countries in terms of tourism.

FIGURE 6: ASIA PACIFIC – TAX RATE ON HOTEL ROOMS

Asia Pacific Countries	Total Tax
Cambodia*	19%
Thailand	7%
Malaysia	6%
Sri Lanka	16%
China	17%
Vietnam*	15%
Pakistan	16%
Indonesia	11%
Bangladesh	27%
<b>India</b>	<b>12 - 18%</b>

\*Countries which levy service charge and other taxes  
Source: Hotelivate Research

While we have not considered taxation as a parameter for comparing the Indian states in the current edition of this report, a revival may be in order by the next edition, subject to changes in the dynamic/seasonal GST structures or a further reduction implemented at the state level.

## State Expenditure On Tourism

In the last few years, while all states have continued to increase their overall expenditure – both revenue and capital expenditure – only a few have focused on the Tourism sector and the need for maintaining, improving or expanding its infrastructure. As per the data released by RBI, in 2018-19 the overall increase in revenue expenditure for tourism was 6% and capital expenditure was 12% over 2016-17 figures. Despite this, Tourism spend as a percentage of Total Expenditure continued to remain dismally low, ranging between 0.005% and 0.64% across states.

For this parameter, by tabulating the capital expenditure and revenue expenditure, we have assessed the total expenditure by each state government towards tourism. Figures 7 and 8 (overleaf) present our point allocation criteria and ranking of the states for this evaluation parameter, respectively.

FIGURE 7: METHODOLOGY FOR STATE EXPENDITURE ON TOURISM

Range	Points
Above 0.55%	25
0.41% to 0.55%	20
0.26% to 0.40%	15
0.10% to 0.25%	10
Below 0.10%	5

## Tourist Visits

Blessed with varied natural landscapes as well as historical and architectural marvels, India has a plethora of tourist-centric destinations spread across the length and breadth of the country. However, in order to gauge and compare a state's tourism attractiveness, one must consider annual tourist visitations, which is one of the best indicators of its ability to induce Travel & Tourism demand. In 2018, India recorded 1.85 billion domestic tourist visits, a 12% increase over the previous year. International tourist visits to various states in the country also grew by around 7% to touch 28.87 million during this period.

Figure 9 explains the methodology for point allocation under this parameter and Figures 10 and 11 present the overall state rankings.

In comparison to 2016-17 figures, 2018-19 witnessed major shifts, wherein nearly a dozen states made significant changes in their expenditure towards tourism. Kerala and Bihar made severe cuts in their tourism spend, thus, sliding from their 2017 rankings by 11 and 12 places, respectively. On the other hand, Uttar Pradesh, Arunachal Pradesh, Meghalaya, Andhra Pradesh and Punjab increased their expenditure on tourism substantially, moving up several places in this year's rankings.

Specifically, Uttar Pradesh was the biggest mover in this parameter, displacing many states to climb up to the 15<sup>th</sup> spot. Moreover, five of the eight north eastern states showed an improvement in rankings, which together with the gradual rise in branded hotel supply and the government's strong intent to promote certain destinations in the area, bodes well for the region's future.

FIGURE 9: METHODOLOGY FOR TOURIST VISITS

Rank	Points
1 to 5	15
6 to 10	12
11 to 15	8
16 to 20	5
21 to 25	2
Above 25	0



FIGURE 8: POINT ALLOCATION FOR STATE EXPENDITURE ON TOURISM

State	Revenue Expenditure* (₹ in lakh)		Capital Expenditure** (₹ in lakh)		Total State Expenditure (₹ in lakh)			Tourism Spend as a % of Total Expenditure	Points Obtained	Rank 2019	Rank 2017	Rank 2009	Variance (17-19)	Variance (09-19)
	All Sectors	Tourism	All Sectors	Tourism	All Sectors	Tourism	Tourism							
Goa	11,73,605	9,167	22,27,228	12,746	34,00,833	21,913	0.644%	25	1	1	3	-	2	
Sikkim	5,35,627	2,831	9,74,468	6,868	15,10,095	9,699	0.642%	25	2	5	2	3	-	
Jammu & Kashmir	50,56,008	14,442	49,30,624	46,939	99,86,632	61,381	0.615%	25	3	2	1	-1	-2	
Arunachal Pradesh	10,25,566	3,570	31,50,877	12,300	41,76,443	15,870	0.380%	15	4	11	5	7	1	
Uttarakhand	35,62,731	7,428	17,53,139	11,229	53,15,870	18,657	0.351%	15	5	3	4	-2	-1	
Himachal Pradesh	33,56,796	8,685	11,17,465	5,348	44,74,261	14,033	0.314%	15	6	7	18	1	12	
Meghalaya	12,03,630	7,270	31,40,159	1,547	43,43,789	8,817	0.203%	10	7	14	15	7	8	
Gujarat	1,34,63,330	8,596	2,10,19,493	60,950	3,44,82,823	69,546	0.202%	10	8	6	12	-2	4	
Punjab	86,35,127	860	68,41,814	18,411	1,54,76,941	19,271	0.125%	10	9	15	29	6	20	
Andhra Pradesh	1,50,27,199	25,006	1,07,85,108	4,000	2,58,12,307	29,006	0.112%	10	10	17	18	7	8	
Manipur	11,00,924	1,837	25,25,436	1,950	36,26,360	3,787	0.104%	10	11	12	11	1	-	
Karnataka	1,66,28,960	20,606	5,62,87,020	45,093	7,29,15,980	65,699	0.090%	5	12	13	18	1	6	
Delhi	43,09,181	4,606	9,90,819	15	53,00,000	4,621	0.087%	5	13	9	13	-4	-	
Jharkhand	62,74,444	5,136	13,37,764	11,060	1,96,49,208	16,196	0.082%	5	14	18	7	4	-7	
Uttar Pradesh	3,21,52,027	12,609	54,1,46,381	56,093	8,62,98,408	68,702	0.080%	5	15	28	25	13	10	
Bihar	1,36,73,967	4,270	6,9,83,975	10,801	2,06,57,942	15,071	0.073%	5	16	4	18	-12	2	
Maharashtra	3,01,34,286	40,861	59,6,65,849	18,521	89,8,00,135	59,382	0.066%	5	17	16	9	-1	-8	
Mizoram	7,17,962	739	13,43,177	550	20,61,139	1,289	0.063%	5	18	10	10	-8	-8	
Kerala	1,15,66,105	22,407	2,59,52,820	244	3,75,18,925	22,651	0.060%	5	19	8	7	-11	-12	
Odisha	90,22,000	8,418	2,76,41,640	12,600	3,66,63,640	21,018	0.057%	5	20	19	18	-1	-2	
West Bengal	1,46,74,776	20,682	6,32,59,197	16,400	7,79,33,973	37,082	0.048%	5	21	22	25	1	4	
Nagaland	12,11,283	1,031	14,91,552	0	27,02,835	1,031	0.038%	5	22	21	6	-1	-16	
Rajasthan	1,69,11,835	11,815	3,93,94,570	7,592	5,63,06,405	19,407	0.034%	5	23	24	18	1	-5	
Madhya Pradesh	1,55,62,392	15,550	6,08,40,626	8,300	7,64,03,018	23,850	0.031%	5	24	20	14	-4	-10	
Chhattisgarh	68,42,262	2,730	1,51,79,577	3,170	2,20,21,839	5,900	0.027%	5	25	23	12	-2	-13	
Assam	71,32,937	7,570	3,09,35,890	2,013	3,80,68,827	9,583	0.025%	5	26	27	25	1	-1	
Telangana	1,25,45,470	3,794	1,16,26,497	0	2,41,71,967	3,794	0.016%	5	27	26		-1		
Haryana	85,18,653	398	2,62,58,104	4,775	3,47,76,757	5,173	0.015%	5	28	25	25	-3	-3	
Tamil Nadu	1,93,74,206	2,624	5,08,30,459	5,500	7,02,04,665	8,124	0.012%	5	29	30	16	1	-13	
Tripura	12,93,397	325	54,14,631	0	67,08,028	325	0.005%	5	30	29	18	-1	-12	

\*Revenue Expenditure - incurred in the course of regular business transactions and availed during the same accounting year

\*\*Capital Expenditure - incurred for acquiring a fixed asset or one which results in increasing the earning capacity and is availed in multiple accounting years

Source: RBI - State Finances: A Study of Budgets 2018-19

FIGURE 10: DOMESTIC AND INTERNATIONAL TOURIST VISITS (2018)

State	Domestic Tourists	Rank	State	International Tourists	Rank
Tamil Nadu	38,59,09,376	1	Tamil Nadu	60,74,345	1
Uttar Pradesh	28,50,79,848	2	Maharashtra*	50,78,514	2
Karnataka	21,43,06,456	3	Uttar Pradesh	37,80,752	3
Andhra Pradesh	19,47,67,874	4	Delhi*	27,40,502	4
Maharashtra*	11,91,91,539	5	Rajasthan	17,54,348	5
Telangana	9,28,78,329	6	West Bengal	16,17,105	6
West Bengal	8,56,57,365	7	Punjab	12,00,969	7
Madhya Pradesh	8,39,69,799	8	Kerala	10,96,407	8
Gujarat	5,43,69,873	9	Bihar	10,87,971	9
Rajasthan	5,02,35,643	10	Goa	9,33,841	10
Punjab	4,45,95,061	11	Karnataka	5,43,716	11
Uttarakhand	3,56,09,650	12	Gujarat	5,13,113	12
Jharkhand	3,54,08,822	13	Madhya Pradesh	3,75,476	13
Bihar	3,36,21,613	14	Himachal Pradesh	3,56,568	14
Delhi*	2,91,14,423	15	Telangana	3,18,154	15
Chhattisgarh	1,93,29,501	16	Andhra Pradesh	2,81,083	16
Jammu & Kashmir	1,70,76,315	17	Jharkhand	1,75,801	17
Himachal Pradesh	1,60,93,935	18	Uttarakhand	1,51,320	18
Kerala	1,56,04,661	19	Jammu & Kashmir	1,39,520	19
Odisha	1,52,08,540	20	Odisha	1,10,818	20
Goa	70,81,559	21	Tripura	1,02,861	21
Assam	58,56,282	22	Haryana	73,977	22
Haryana	48,88,952	23	Sikkim	71,172	23
Sikkim	14,26,127	24	Assam	36,846	24
Meghalaya	11,98,340	25	Meghalaya	18,114	25
Arunachal Pradesh	5,12,436	26	Chhattisgarh	14,399	26
Tripura	4,14,388	27	Arunachal Pradesh	7,653	27
Manipur	1,76,109	28	Manipur	6,391	28
Nagaland	1,01,588	29	Nagaland	5,010	29
Mizoram	76,551	30	Mizoram	967	30

\*Reported figures are equivalent to previous year figures

Source: Ministry of Tourism, Government of India

FIGURE 11: POINT ALLOCATION FOR TOURIST VISITS

State	Points Obtained			Rank 2019	Rank 2017	Rank 2009	Variance (17-19)	Variance (09-19)
	Domestic	International	Total					
Tamil Nadu	15	15	30	1	1	1	-	-
Uttar Pradesh	15	15	30	1	1	1	-	-
Maharashtra	15	15	30	1	3	4	2	3
Rajasthan	12	15	27	4	5	1	1	-3
West Bengal	12	12	24	5	3	7	-2	2
Delhi	8	15	23	6	6	8	-	2
Karnataka	15	8	23	6	6	4	-	-2
Andhra Pradesh	15	5	20	8	6	4	-2	-4
Punjab	8	12	20	8	10	22	2	14
Madhya Pradesh	12	8	20	8	6	8	-2	-
Bihar	8	12	20	8	10	13	2	5
Gujarat	12	8	20	8	10	8	2	-
Telangana	12	8	20	8	13	5	-	-
Kerala	5	12	17	14	13	8	-1	-6
Goa	2	12	14	15	15	13	-	-2
Himachal Pradesh	5	8	13	16	16	13	-	-3
Uttarakhand	8	5	13	16	16	8	-	-8
Jharkhand	8	5	13	16	20	20	4	4
Odisha	5	5	10	19	19	18	-	-1
Jammu & Kashmir	5	5	10	19	16	16	-3	-3
Chhattisgarh	5	0	5	21	20	25	-1	4
Haryana	2	2	4	22	20	16	-2	-6
Assam	2	2	4	22	23	18	1	-4
Sikkim	2	2	4	22	23	20	1	-2
Meghalaya	2	2	4	22	25	22	3	-
Tripura	0	2	2	26	25	22	-1	-4
Arunachal Pradesh	0	0	0	27	27	25	-	-2
Manipur	0	0	0	27	27	27	-	-
Mizoram	0	0	0	27	27	27	-	-
Nagaland	0	0	0	27	27	27	-	-

Source: Hotelivate Research



Tamil Nadu and Uttar Pradesh have retained their pole positions for a decade in this parameter, recording the highest number of total tourist visits. While Tamil Nadu dominates both in terms of domestic as well as international visitation, Uttar Pradesh, ranks second in terms of domestic tourist visits and third in terms of international visitation.

Tamil Nadu singlehandedly accounted for around 21% of the total tourist visitations to all states in 2018. This is chiefly due to pilgrimage tourism, whereby it attracts many tourists from neighbouring states to its temples, some of which are UNESCO World Heritage Sites, such as Shore Temple, Iravatheswarar Temple in Darasuram and Brahadeeswarar Temple in Gangaikonda. In addition, the state is also well served by four international airports, namely, Chennai, Madurai, Tiruchirappalli and Coimbatore and two major ports in Chennai and Thoothukudi, making it conveniently accessible from both within and outside the country.

Uttar Pradesh received around 15% of the total visitations in the country in 2018. Apart from being home to the Taj Mahal, the state also houses other UNESCO World Heritage Sites like the Agra Fort and Fatehpur Sikri, and the spiritual capital of India, Varanasi. Underscoring the importance of tourism, the state government has been taking many initiatives to bolster demand in this sector. According to its latest tourism policy, the state has set targets over the next five years, which include attracting investments in the tourism sector to the tune of ₹5,000 crore each year, creating 5 lakh employment opportunities, and becoming the most preferred tourist destination in the country by 2023. In the current fiscal, the Uttar Pradesh government has significantly increased its expenditure on tourism as well as marketing and publicity to promote various destinations in the state. Resultantly, we anticipate Uttar Pradesh to attract more tourists in the coming years.

Among the movers, Telangana made a significant shift, moving up five places since the last survey, mainly on account of an improvement in international visitations. In contrast, states such as Jammu & Kashmir, West Bengal, Andhra Pradesh and Madhya Pradesh slid by two or three places in comparison to the last survey.

In terms of decadal variance, Punjab has made a massive transition, from being placed at the 22<sup>nd</sup> position in 2009 to climbing 14 places and reaching the 8<sup>th</sup> position in this year's survey.

Going forward, states that do not improve their tourism infrastructure and actively engage in promoting themselves will stand to lose out not just in terms of tourist visitations but also the direct and indirect benefits to the local economy.

## Presence of Branded Hotel Rooms

Since 2016-17, branded hotel rooms in India have grown by 12%, an increase of approximately 14,000 rooms. Much of the new supply has entered states like Karnataka and Tamil Nadu that added close to 3,000 rooms each, and Goa, Maharashtra, West Bengal, Gujarat, Rajasthan and Uttar Pradesh that added around 1,000 rooms each.

Most hotel projects, prior to being developed, undergo an extensive evaluation study in order to assess the potential of long-term demand, growth and economic feasibility. Therefore, one can safely assume there to be a correlation between the number of branded rooms in a state and its overall tourism attractiveness and hospitality competitiveness.

Figures 12 and 13 present our methodology and state ranking for this parameter, respectively.

**FIGURE 12: METHODOLOGY FOR PRESENCE OF BRANDED HOTEL ROOMS**

Rank	Points
1 to 3	10
4 to 6	8
7 to 9	6
10 to 12	4
13 to 15	2
Above 15	0

In terms of the absolute number of branded hotel rooms, Maharashtra, Karnataka, Delhi, Tamil Nadu and Rajasthan are the top five states, respectively. However, when one looks at the density of branded hotel rooms per 100 sq km, Delhi ranks first, followed by Goa, Haryana, Tamil Nadu and Kerala. Going forward, despite Bengaluru and Mumbai expected to house more branded hotel rooms than Delhi, by virtue of being the smallest state, the nation's capital is likely to retain its top position in the ranking for this parameter in the coming years as well.

Since 2017, the maximum number of branded rooms have entered Karnataka, of which 87% opened in Bengaluru itself. Called the 'Silicon Valley of India', the city is home to many prominent companies in the IT/ITeS, defence, aerospace, banking and finance sectors.

On the other hand, while many states have shifted places over the years on account of a change in the number of branded rooms, Odisha, Bihar, Arunachal Pradesh, Manipur, Meghalaya, Mizoram and Nagaland have remained at the bottom of the list. Even though these states boast unique tourist attractions, challenges such as limited connectivity, lack of promotion, safety and security concerns and few to nil branded hotel rooms make them the least competitive in this parameter.

By and large, both domestic as well as international travellers are price sensitive and seek quality accommodation at affordable rates. However, only 14% of the total branded hotel rooms in India are positioned in the economy or budget category. The majority have an upper mid market positioning (24%), while the remaining inventory is distributed between mid market (20%) and hotels belonging to upscale, upper upscale and luxury positioning (42%). At the state level, the ones with sizeable number of rooms in the economy and budget space are Gujarat, Maharashtra, Karnataka and Tamil Nadu.

States (especially those that retain the lowest ranking in this parameter) should encourage owners and operators to develop branded hotel rooms, especially in the economy and budget segment. These types of hotels have no-frills and require lower investment in comparison to the higher positioned hotels. Such development will not only add to the existing tourism infrastructure but also help the state in creating direct and indirect benefits.

## GSDP Per Capita

Gross State Domestic Product (GSDP) is a major indicator of the economic health of a state. In monetary terms, GSDP is a measure of the volume of goods and services produced within a state, annually. In difficult economic conditions, the Travel & Tourism industry is typically the first to get affected and the last to recover. Thus, GSDP per capita was introduced as a ranking parameter in 2011 and continues to be one of the fundamentals for our comparison.

In terms of the top five, Goa and Delhi have interchanged their positions in this year's rankings, while Sikkim and Haryana have continued to retain their places since 2013. Making a surprise entry is Karnataka, moving up four places since the last survey. Telangana also made significant improvement since the last edition, rising six places to occupy the 6<sup>th</sup> rank. In contrast, the bottom five on the list remain the same as in 2017 – Jharkhand, Assam, Manipur, Uttar Pradesh and Bihar. Figure 14 illustrates our methodology for point allocation and Figure 15 (on Page 7) presents the state rankings for GSDP per capita.





FIGURE 13: POINT ALLOCATION FOR PRESENCE OF BRANDED HOTEL ROOMS

State	No. of Branded Rooms	State Area (Km <sup>2</sup> )	Branded Rooms per 100 Km <sup>2</sup>	Points Obtained	Rank 2019	Rank 2017	Rank 2009	Variance (17-19)	Variance (09-19)
Delhi	14,859	1,484	1,001.28	10	1	1	1	-	-
Goa	6,828	3,702	184.44	10	2	2	2	-	-
Haryana	6,560	44,212	14.84	10	3	3	4	-	1
Tamil Nadu	12,534	1,30,060	9.64	8	4	5	6	1	2
Kerala	3,404	38,852	8.76	8	5	4	3	-1	-2
Karnataka	16,434	1,91,791	8.57	8	6	7	5	1	-1
Maharashtra	23,502	3,07,713	7.64	6	7	6	7	-1	-
Telangana	7,006	1,12,077	6.25	6	8	8	-	-	-8
Punjab	3,101	50,362	6.16	6	9	9	16	-	7
West Bengal	4,131	88,752	4.65	4	10	10	11	-	1
Gujarat	7,723	1,96,224	3.94	4	11	11	14	-	3
Uttarakhand	1,836	53,483	3.43	4	12	12	8	-	-4
Rajasthan	9,123	3,42,239	2.67	2	13	13	13	-	-
Uttar Pradesh	6,375	2,40,928	2.65	2	14	14	17	-	3
Sikkim	143	7,096	2.02	2	15	18	9	3	-6
Himachal Pradesh	1,058	55,673	1.90	0	16	16	12	-	-4
Andhra Pradesh	2,050	1,62,968	1.26	0	17	15	15	-2	-2
Tripura	98	10,486	0.93	0	18	17	10	-1	-8
Assam	534	78,438	0.68	0	19	20	22	1	3
Madhya Pradesh	2,093	3,08,252	0.68	0	20	19	18	-1	-2
Jammu & Kashmir	1,091	2,22,236	0.49	0	21	22	21	1	-
Jharkhand	381	79,716	0.48	0	22	21	19	-1	-3
Chhattisgarh	484	1,35,192	0.36	0	23	23	25	-	2
Odisha	489	1,55,707	0.31	0	24	24	20	-	-4
Bihar	105	94,163	0.11	0	25	25	24	-	-1
Arunachal Pradesh	0	83,743	0.00	0	26	26	23	-	-3
Manipur	0	22,327	0.00	0	26	27	25	1	-1
Meghalaya	0	22,429	0.00	0	26	27	25	1	-1
Mizoram	0	21,081	0.00	0	26	27	25	1	-1
Nagaland	0	16,579	0.00	0	26	27	25	1	-1

Source: Hotelivate Research

FIGURE 14: METHODOLOGY FOR GSDP PER CAPITA

Range	Points
Above 99,999	10.0
75,000 to 99,999	7.5
50,000 to 74,999	5.0
25,000 to 49,999	2.5

FIGURE 16: METHODOLOGY FOR OFFICIAL WEBSITE

Rank	Points
1 to 5	4
6 to 9	3
10 to 12	2
13 to 15	1
Above 15	0

## Effectiveness of Marketing Campaign

Our method for evaluating the effectiveness of marketing campaign compares (i) the state expenditure on marketing/publicity; (ii) the social media outreach of each state; and (iii) the rating of the state tourism website on a global level.

For social media outreach, we have tracked the state's official pages on social media platforms, such as Facebook, Twitter, YouTube and Instagram to quantify the state tourism following (Figure 20). Additionally, we have assessed the tourism websites based on the volume of traffic received using Alexa.com, a subsidiary company of Amazon.com, that tracks all traffic on all websites and is considered an international benchmark for website ratings (Figure 17).

It is to be noted that due to unavailability of Expenditure on Marketing and Publicity figures for 2018-19, we have used figures from the last survey for the following states: Haryana, Jammu & Kashmir, Arunachal Pradesh, Tripura, Telangana, Manipur, Jharkhand, Karnataka, Nagaland and Mizoram.

Under this parameter, we also compared the country's official tourism campaign website 'Incredible India' with those of tourism hot spots in the region, such as Singapore, Thailand, Malaysia and Indonesia (Figure 18). Notably, tourism campaign websites of Singapore, Thailand and Indonesia are the only ones that ranked better than India's. That said, it is important to highlight that the 'Incredible India' campaign website ranked 56,488 in 2009 and over the past decade, it has declined significantly to now rank 1,57,128.

The world has evolved in the past 10 years, and the way people communicate and share their experiences has also changed. While tourism websites remain critical, as they are a key platform to showcase a country's tourism potential in the form of various destinations and share important tourist related information, there is also a need for strong presence on social media platforms. For example, Instagram has more than a billion users and is popular with consumers and businesses alike. The 'Incredible India' page on Instagram commands a following of 1,77,000 users while its contemporaries such as 'Visit Singapore' and 'Amazing Thailand' command 4,18,000 and 3,48,000 users; 'Visit Dubai' has a following of 1.5 million users. Needless to say, the 'Incredible India' brand needs to adopt a different approach to marketing tourism, both in India and around the globe.



FIGURE 15: POINT ALLOCATION FOR GSDP PER CAPITA

State	GSDP* (₹ in crore) 2018/19	Population (2011)	GSDP Per Capita (₹)	Points Obtained	Rank 2019	Rank 2017	Rank 2009	Variance (17-19)	Variance (09-19)
Goa	77,172	14,58,545	5,29,101	10.0	1	2	2	1	1
Delhi	7,79,652	1,67,87,941	4,64,412	10.0	2	1	1	-1	-1
Sikkim	26,786	6,10,577	4,38,693	10.0	3	3	9	-	6
Haryana	7,07,126	2,53,51,462	2,78,929	10.0	4	4	4	-	-
Karnataka	15,35,224	6,10,95,297	2,51,283	10.0	5	9	5	4	-
Telangana**	8,65,688	3,50,03,674	2,47,313	10.0	6	12		6	-6
Uttarakhand	2,45,895	1,00,86,292	2,43,791	10.0	7	5	8	-2	1
Tamil Nadu	16,64,159	7,21,47,030	2,30,662	10.0	8	8	6	-	-2
Himachal Pradesh	1,53,181	68,64,602	2,23,146	10.0	9	10	12	1	3
Gujarat	13,14,680	6,04,39,692	2,17,519	10.0	10	11	14	1	4
Maharashtra	24,11,600	11,23,74,333	2,14,604	10.0	11	6	7	-5	-4
Kerala	7,00,532	3,34,06,061	2,09,702	10.0	12	7	3	-5	-9
Andhra Pradesh	9,33,402	4,93,86,799	1,88,998	10.0	13	16	15	3	2
Punjab	5,21,861	2,77,43,338	1,88,103	10.0	14	13	16	-1	2
Mizoram	19,457	10,97,206	1,77,335	10.0	15	17	25	2	10
Arunachal Pradesh	22,045	13,83,727	1,59,317	10.0	16	14	23	-2	7
Rajasthan	9,29,124	6,85,48,437	1,35,543	10.0	17	15	13	-2	-4
West Bengal	11,77,586	9,12,76,115	1,29,014	10.0	18	18	11	-	-7
Tripura	46,133	3,67,917	1,25,569	10.0	19	24	10	5	-9
Nagaland	24,281	19,78,502	1,22,726	10.0	20	20	25	-	5
Chhattisgarh	3,11,660	2,55,45,198	1,22,003	10.0	21	19	25	-2	4
Odisha	4,85,376	4,19,74,218	1,15,637	10.0	22	23	20	1	-2
Madhya Pradesh	8,09,327	7,26,26,809	1,11,436	10.0	23	25	18	2	-5
Jammu & Kashmir	1,38,488	1,25,41,302	1,10,425	10.0	24	21	21	-3	-3
Meghalaya	30,790	29,66,889	1,03,778	10.0	25	22	25	-3	-
Jharkhand	3,07,581	3,29,88,134	93,240	7.5	26	26	19	-	-7
Assam	2,88,494	3,12,05,576	92,449	7.5	27	27	22	-	-5
Manipur	23,968	28,55,794	83,927	7.5	28	28	25	-	-3
Uttar Pradesh	15,42,432	19,98,12,341	77,194	7.5	29	29	17	-	-12
Bihar	5,57,490	10,40,99,452	53,554	5.0	30	30	24	-	-6
<b>Average</b>	<b>6,21,706</b>	<b>4,02,44,309</b>	<b>1,91,313</b>						

\*2017-18 figures used for the following states: Arunachal Pradesh, Assam, Jammu & Kashmir, Kerala, Maharashtra, Manipur, Meghalaya, Mizoram, Nagaland and Tripura

\*\*GSDP of 2018-19 (AE) at Current Prices for Telangana

Source: Census of India 2011, MOSPI, State Economic Surveys, RBI Data

FIGURE 17: POINT ALLOCATION FOR OFFICIAL WEBSITE

State	Official Website	Alexa Global Ranking	Points Obtained	Rank 2019	Rank 2017	Rank 2009	Variance (17-19)	Variance (09-19)
Rajasthan	tourism.rajasthan.gov.in	1,366	4	1	1	2	-	1
Kerala	keralatourism.org	77,317	4	2	4	3	2	1
Mizoram	tourism.mizoram.gov.in	86,069	4	3	6	26	3	23
Gujarat	gujarattourism.com	1,35,190	4	4	8	8	4	4
Uttarakhand	uttarakhandtourism.gov.in	1,52,958	4	5	15	11	10	6
Madhya Pradesh	mptourism.com	2,09,950	3	6	12	13	6	7
Maharashtra	maharashtratourism.gov.in	2,15,762	3	7	5	6	-2	-1
Delhi	delhitourism.gov.in	2,44,538	3	8	7	5	-1	-3
Telangana	telanganatourism.gov.in	2,53,35	3	9	14		5	-9
Goa	www.goa-tourism.com	3,19,337	2	10	10	18	-	8
Tamil Nadu	tamilnadutourism.org	3,30,702	2	11	11	21	-	10
Himachal Pradesh	himachaltourism.gov.in	3,51,301	2	12	20	10	8	-2
Odisha	https://odishatourism.gov.in	3,97,987	1	13	25	9	12	-4
Sikkim	sikkimtourism.gov.in	4,22,506	1	14	16	19	2	5
Haryana	haryanatourism.gov.in	4,35,419	1	15	23	15	8	-
West Bengal	https://wbtourismgov.in/	4,62,352	0	16	17	4	1	-12
Karnataka	http://www.karnatakaturism.org	6,14,067	0	17	13	12	-4	-5
Meghalaya	megtourism.gov.in	6,88,248	0	18	18	17	-	-1
Punjab	punjabtourism.gov.in	7,44,712	0	19	27	27	8	8
Jharkhand	http://jharkhandtourism.gov.in/	7,65,380	0	20	29	25	9	5
Jammu & Kashmir	jktourism.org	9,50,457	0	21	22	23	1	2
Arunachal Pradesh	arunachaltourism.com	10,29,629	0	22	24	22	2	-
Andhra Pradesh	goandhrapradesh.com	11,07,973	0	23	9	14	-14	-9
Bihar	bihartourism.gov.in	11,20,321	0	24	2	1	-22	-23
Uttar Pradesh	up-tourism.com	12,73,684	0	25	19	16	-6	-9
Chhattisgarh	visitcg.in	15,51,307	0	26	3	28	-23	2
Tripura	tripuratourism.gov.in	15,84,439	0	27	26	24	-1	-3
Manipur	http://www.manipur tourism.gov.in/	17,15,788	0	28	30	20	2	-8
Assam	tourism.assam.gov.in	17,28,126	0	29	21	7	-8	-22
Nagaland*	tourismnagaland.com	19,00,417	0	30	28	29	-2	-1

\*Recent data for tourismnagaland.com is not available. The last available data has been used for this website

Source: Alexa.com 2019



FIGURE 18: COUNTRY TOURISM WEBSITE RANKINGS

Asia Pacific Countries	Tourism Campaign	Official Website	Alexa Global Ranking
Singapore	Visit Singapore	visitsingapore.com	58,350
Thailand	Amazing Thailand	tourismthailand.org	87,642
Indonesia	Wonderful Indonesia	indonesia.travel	1,55,057
Malaysia	Visit Truly Asia Malaysia	www.malaysia.travel	1,99,779
Sri Lanka	So Sri Lanka	srilanka.travel	3,11,270
Vietnam	#VietnamNOW	www.vietnam.travel	3,12,532
Cambodia	Kingdom of Wonder	visitcambodia.org	32,97,020
Bangladesh	Life happens here	www.tourisminfbd.com	69,20,441
India	Incredible India	incredibleindia.org	1,57,128

Source: Hotelivate Research

FIGURE 19: METHODOLOGY FOR SOCIAL MEDIA OUTREACH

Rank	Points
1 to 5	3
6 to 10	2
11 to 15	1
Above 15	0

FIGURE 20: POINT ALLOCATION FOR SOCIAL MEDIA OUTREACH

State	Facebook (Likes)	Facebook (Followers)	Twitter (Followers)	YouTube (Subscribers)	Instagram (Followers)	Total Social Media Outreach	Points Obtained	Rank 2019	Rank 2017	Variance (17-19)
Kerala	34,81,211	34,99,557	18,33,696	1,13,756	2,29,000	56,76,009	3	1	1	-
Gujarat	13,29,568	13,26,242	17,51,704	14,301	1,12,000	32,04,247	3	2	2	-
Goa	9,22,594	9,22,207	6,26,281	1,901	76,700	25,49,683	3	3	4	1
Rajasthan	5,87,724	5,89,482	96,910	1,02,166	2,13,000	15,89,282	3	4	6	2
West Bengal	12,21,659	12,21,325	3,13,016	7,343	8,493	15,50,511	3	5	3	-2
Odisha	2,37,726	2,38,817	11,42,619	6,841	22,700	14,09,886	2	6	5	-1
Madhya Pradesh	11,55,232	11,58,950	60,243	30,627	75,200	13,21,302	2	7	7	-
Andhra Pradesh	5,53,701	5,53,619	5,175	3,895	3,892	11,20,282	2	8	10	2
Uttar Pradesh	3,67,503	3,68,141	4,27,801	822	35,000	8,31,126	2	9	8	-1
Uttarakhand	4,85,807	4,74,154	38,207	951	1,12,000	6,36,965	2	10	20	10
Maharashtra	1,28,466	1,28,940	2,35,879	22,843	3,958	5,20,086	1	11	9	-2
Jammu & Kashmir	3,55,577	3,80,063	11,391	28,368	-	4,19,822	1	12	13	1
Chhattisgarh	1,68,817	1,68,248	1,34,343	2,322	15,100	3,20,582	1	13	11	-2
Telangana	71,501	72,337	9,730	-	238	82,305	1	14	12	-2
Meghalaya	23,970	24,249	707	173	4,225	53,324	1	15	16	1
Karnataka	19,603	20,168	4,547	126	5,978	50,422	0	16	19	3
Arunachal Pradesh	21,963	22,336	2,675	2,049	197	49,220	0	17	18	1
Manipur	21,736	22,534	1,567	5,020	3,438	31,761	0	18	17	-1
Bihar	6,523	6,640	6,011	4,485	12,700	29,719	0	19	25	6
Jharkhand	9,794	10,023	7,113	323	2,034	29,287	0	20	22	2
Tripura	19,038	19,365	742	-	429	20,536	0	21	21	-
Sikkim	4,035	4,145	5,776	2	10,400	20,323	0	22	26	4
Delhi	28,746	29,116	4,279	387	7,521	12,187	0	23	14	-9
Haryana	3,289	3,368	3,599	170	223	10,649	0	24	27	3
Assam	8,414	8,536	1,219	521	164	10,440	0	25	24	-
Tamil Nadu	3,056	3,083	479	822	431	7,871	0	26	15	-11
Punjab	1,630	1,682	3,702	852	-	6,184	0	27	30	3
Nagaland	3,454	3,531	0	-	2,393	5,924	0	28	29	1
Himachal Pradesh	3,028	3,062	1,410	366	202	5,040	0	29	23	-6
Mizoram	1,815	1,853	781	7	1,519	4,122	0	30	28	-2

Source: Hotelivate Research

FIGURE 21: METHODOLOGY FOR EXPENDITURE ON MARKETING AND PUBLICITY

Rank	Points
1 to 10	3
11 to 20	2
21 to 30	1

## Urbanisation

Economic development and urbanisation go hand in hand. Nearly three decades ago, India embarked on the path of economic liberalization, opening its doors to private and foreign investments. Since then, the economy has made great strides, simultaneously shaping the urban landscape of the country. In 1991, only 25.7% of the total population (approximately 843 million) was estimated to be living in urban areas and engaged in activities outside agriculture. By 2011 (last census year) the figure grew to 31% (1.2 billion), marking an increase, albeit at a slow rate. As per a World Bank Report, urbanisation in India has been sluggish, with the share of the population living in officially classified urban settlements growing at a meagre rate of just over 1.15% a year from 2001 to 2011.

Delhi due to its relatively small area and being one of the most densely populated states has the highest urbanisation rate of 97.5%. Other smaller states like Goa and Mizoram follow suit in the ranking, respectively. However, in absolute figures, states such as Maharashtra,

FIGURE 22: POINT ALLOCATION FOR EXPENDITURE ON MARKETING AND PUBLICITY

State	Expenditure on Marketing & Publicity (₹)	Points Obtained	Rank 2019
Uttar Pradesh	7,28,18,76,000	3	1
Uttarakhand	1,13,60,01,000	3	2
Kerala	1,13,25,32,000	3	3
Maharashtra	80,00,00,000	3	4
Haryana	69,40,00,000	3	5
Odisha	55,10,01,000	3	6
Jammu & Kashmir	52,00,00,000	3	7
Delhi	38,90,00,000	3	8
Goa	35,20,00,000	3	9
Assam	30,71,94,000	3	10
Arunachal Pradesh	30,00,00,000	2	11
Tripura	26,40,30,000	2	12
Telangana	22,43,00,000	2	13
Bihar	22,00,00,000	2	14
Rajasthan	15,98,00,000	2	15
Manipur	12,69,33,000	2	16
West Bengal	11,00,00,000	2	17
Tamil Nadu	10,50,15,000	2	18
Chhattisgarh	10,00,00,000	2	19
Himachal Pradesh	9,30,00,000	2	20
Gujarat	8,37,38,000	1	21
Sikkim	6,60,21,000	1	22
Meghalaya	6,01,33,000	1	23
Punjab	5,01,00,000	1	24
Jharkhand	2,35,09,000	1	25
Karnataka	1,60,00,000	1	26
Andhra Pradesh	72,95,000	1	27
Nagaland	57,82,000	1	28
Mizoram	23,00,000	1	29
Madhya Pradesh	1,00,000	1	30

Source: WTTC Research, Hotelivate Research





**FIGURE 23: POINT ALLOCATION FOR EFFECTIVENESS OF MARKETING CAMPAIGN**

State	Points Obtained			Total	Rank 2019
	Official Website	Social Media Outreach	Govt Expenditure on Marketing & Publicity		
Kerala	4	3	3	10	1
Uttarakhand	4	2	3	9	2
Rajasthan	4	3	2	9	2
Goa	2	3	3	8	4
Gujarat	4	3	1	8	4
Maharashtra	3	1	3	7	6
Odisha	1	2	3	6	7
Telangana	3	1	2	6	7
Delhi	3	0	3	6	7
Madhya Pradesh	3	2	1	6	7
Uttar Pradesh	0	2	3	5	11
West Bengal	0	3	2	5	11
Mizoram	4	0	1	5	11
Jammu & Kashmir	0	1	3	4	14
Haryana	1	0	3	4	14
Himachal Pradesh	2	0	2	4	14
Tamil Nadu	2	0	2	4	14
Assam	0	0	3	3	18
Chhattisgarh	0	1	2	3	18
Andhra Pradesh	0	2	1	3	18
Manipur	0	0	2	2	21
Tripura	0	0	2	2	21
Bihar	0	0	2	2	21
Arunachal Pradesh	0	0	2	2	21
Meghalaya	0	1	1	2	21
Sikkim	1	0	1	2	21
Nagaland	0	0	1	1	27
Jharkhand	0	0	1	1	27
Punjab	0	0	1	1	27
Karnataka	0	0	1	1	27

Source: Hotelivate Research

Uttar Pradesh and Tamil Nadu have among the highest urban population, but they fall behind in this parameter owing to their geographical size.

At present, only 12 states have a higher percentage of urbanisation than the countrywide average of 31%. Going forward, urbanisation is bound to grow, as a greater number of towns and cities will transform into urban centres, thus aiding in the economic development and progress of the country.

Figures 24 and 25 present the methodology and the percentage-wise listing of the urban population of each state, respectively.

**FIGURE 24: METHODOLOGY FOR URBANISATION**

Range	Points
Above 79.9%	10
65.0% to 79.9%	8
50.0% to 64.9%	6
35.0% to 49.9%	4
20.0% to 34.9%	2
Below 20.0%	0

## Road and Rail Infrastructure

The Travel & Tourism industry of any destination is dependent on its transport infrastructure. Since most travellers in India are of a domestic origin, road and rail are dominant modes of transportation. Though India has among the largest road and rail networks in the world, their expansion has been slow, resulting in capacity constraints. The present government at the centre has prioritised the development of road and rail infrastructure, with a substantial capital outlay over the next five years. It has been proposed that 12,000 km of national highways be constructed annually till 2024, all viable rail tracks be converted to broad gauge, and electrification of railway tracks be implemented, among other initiatives.

**FIGURE 25: POINT ALLOCATION FOR URBANISATION**

State	Total Population	Rural Population	Urban Population	Urban Population as a % of Total Population	Points Obtained	Rank 2019
Delhi	1,67,87,941	4,19,042	1,63,68,899	97.5%	10	1
Goa	14,58,545	5,51,731	9,06,814	62.2%	6	2
Mizoram	10,97,206	5,25,435	5,71,771	52.1%	6	3
Tamil Nadu	7,21,47,030	3,72,29,590	3,49,17,440	48.4%	4	4
Kerala	3,34,06,061	1,74,71,135	1,59,34,926	47.7%	4	5
Maharashtra	11,23,74,333	6,15,56,074	5,08,18,259	45.2%	4	6
Gujarat	6,04,39,692	3,46,94,609	2,57,45,083	42.6%	4	7
Telangana	3,50,03,674	2,13,95,009	1,36,08,665	38.9%	4	8
Karnataka	6,10,95,297	3,74,69,335	2,36,25,962	38.7%	4	9
Punjab	2,77,43,338	1,73,44,192	1,03,99,146	37.5%	4	10
Haryana	2,53,51,462	1,65,09,359	88,42,103	34.9%	2	11
West Bengal	9,12,76,115	6,21,83,113	2,90,93,002	31.9%	2	12
Uttarakhand	1,00,86,292	70,36,954	30,49,338	30.2%	2	13
Andhra Pradesh	4,93,86,799	3,47,76,389	1,46,10,410	29.6%	2	14
Manipur	28,55,794	20,21,640	8,34,154	29.2%	2	15
Nagaland	19,78,502	14,07,536	5,70,966	28.9%	2	16
Madhya Pradesh	7,26,26,809	5,25,57,404	2,00,69,405	27.6%	2	17
Jammu & Kashmir	1,25,41,302	91,08,060	34,33,242	27.4%	2	18
Tripura	36,73,917	27,12,464	9,61,453	26.2%	2	19
Sikkim	6,10,577	4,56,999	1,53,578	25.2%	2	20
Rajasthan	6,85,48,437	5,15,00,352	1,70,48,085	24.9%	2	21
Jharkhand	3,29,88,134	2,50,55,073	79,33,061	24.0%	2	22
Chhattisgarh	2,55,45,198	1,96,07,961	59,37,237	23.2%	2	23
Arunachal Pradesh	13,83,727	10,66,358	317,369	22.9%	2	24
Uttar Pradesh	19,98,12,341	15,53,17,278	4,44,95,063	22.3%	2	25
Meghalaya	29,66,889	23,71,439	5,95,450	20.1%	2	26
Odisha	4,19,74,218	3,49,70,562	70,03,656	16.7%	0	27
Assam	3,12,05,576	2,68,07,034	43,98,542	14.1%	0	28
Bihar	10,40,99,452	9,23,41,436	1,17,58,016	11.3%	0	29
Himachal Pradesh	68,64,602	61,76,050	6,88,552	10.0%	0	30

Source: Census of India 2011, Telangana State Portal and Andhra Pradesh State Portal

To compare the states on this parameter, we have considered the total surfaced road length and total railway track length per 100 sq km of area within each state. Figures 26 to 29 present these criteria.

While Delhi continued to top the charts in terms of both road and rail infrastructure, notable improvements were made by Assam and Jharkhand that rose six places each to rank 6<sup>th</sup> and 11<sup>th</sup> this year. Assam made strides by expanding its road network, whereas Jharkhand improved its rail infrastructure. Meanwhile, Bihar has retained its position in the top five, expanding both its road and rail networks.

In contrast, Haryana witnessed a massive drop in rankings, falling 12 places since the last survey largely on account of underperformance in the expansion of its road network vis-à-vis its peers. Western states of Gujarat and Rajasthan slid to the 17<sup>th</sup> and 24<sup>th</sup> positions, respectively, owing to the limited expansion of their rail network and the improvement in the rankings of the other states.

**FIGURE 26: METHODOLOGY FOR ROAD AND RAIL INFRASTRUCTURE**

Rank	Points
1 to 5	5
6 to 10	4
11 to 15	3
16 to 20	2
21 to 25	1
Above 25	0



FIGURE 27: ROAD INFRASTRUCTURE

State	Road Length per 100 Km <sup>2</sup> of Area (Km)	Points Obtained	Rank 2019
Delhi	1,187.7	5	1
Kerala	516.9	5	2
Goa	433.9	5	3
Assam	420.1	5	4
Tripura	375.4	5	5
West Bengal	356.9	4	6
Bihar	219.3	4	7
Nagaland	217.8	4	8
Punjab	215.2	4	9
Tamil Nadu	200.7	4	10
Maharashtra	199.3	3	11
Odisha	185.0	3	12
Karnataka	180.2	3	13
Uttar Pradesh	175.3	3	14
Sikkim	116.2	3	15
Uttarakhand	114.1	2	16
Manipur	111.0	2	17
Telangana	110.3	2	18
Andhra Pradesh	107.0	2	19
Himachal Pradesh	100.2	2	20
Meghalaya	96.9	1	21
Madhya Pradesh	94.1	1	22
Gujarat	91.3	1	23
Jharkhand	83.8	1	24
Chhattisgarh	70.9	1	25
Rajasthan	69.1	0	26
Haryana	59.8	0	27
Mizoram	38.5	0	28
Arunachal Pradesh	36.7	0	29
Jammu & Kashmir	22.4	0	30

Source: Total and Surfaced Road Statistics 2017; Ministry of Statistics and Program Implementation

FIGURE 28: RAIL INFRASTRUCTURE

State	Railway Track Length per 100 Km <sup>2</sup> of Area (Km)	Points Obtained	Rank 2019
Delhi	53.10	5	1
West Bengal	11.90	5	2
Bihar	8.08	5	3
Jharkhand	8.07	5	4
Punjab	7.21	5	5
Haryana	7.18	4	6
Uttar Pradesh	6.60	4	7
Kerala	5.33	4	8
Tamil Nadu	5.18	4	9
Andhra Pradesh	4.49	4	10
Assam	4.47	3	11
Gujarat	3.94	3	12
Maharashtra	3.65	3	13
Odisha	3.42	3	14
Madhya Pradesh	3.00	3	15
Karnataka	2.89	2	16
Telangana	2.81	2	17
Goa	2.65	2	18
Tripura	2.60	2	19
Rajasthan	2.57	2	20
Chhattisgarh	2.14	1	21
Himachal Pradesh	0.64	1	22
Uttarakhand	0.35	1	23
Jammu & Kashmir	0.22	1	24
Nagaland	0.13	1	25
Manipur	0.08	0	26
Meghalaya	0.06	0	27
Arunachal Pradesh	0.03	0	28
Mizoram	0.03	0	29
Sikkim	0.00	0	30

Source: Indian Railways Year Book 2018-19

## Aircraft Movement

Air transportation in India is becoming increasingly affordable and accessible to the masses. The advent of low-cost carriers, regional connectivity schemes like Ude Desh ka Aam Nagrik (UDAN) launched by the central government, and the rising disposable incomes and aspirations of the Indian middle class have propelled the country's aviation sector to new heights.

As per the Airports Authority of India (AAI), in 2018-19, a total of 344 million passengers (inclusive of transit passengers) were served at 102 airports against 308 million passengers in 2017-18, registering a growth of 11.6%. Much of this growth can be attributed to domestic airlines increasing their capacity and expanding their domestic and international networks. Following the success of UDAN 1 and UDAN 2, that focused on connecting Tier-II and III cities, the Ministry of Civil Aviation launched

FIGURE 29: POINT ALLOCATION FOR ROAD AND RAIL INFRASTRUCTURE

State	Points Obtained			Rank 2019	Rank 2017	Variance (17-19)
	Road	Rail	Total			
Delhi	5	5	10	1	1	-
Kerala	5	4	9	2	3	1
West Bengal	4	5	9	2	3	1
Bihar	4	5	9	2	5	3
Punjab	4	5	9	2	1	-1
Assam	5	3	8	6	12	6
Tamil Nadu	4	4	8	6	5	-1
Goa	5	2	7	8	5	-3
Tripura	5	2	7	8	5	-3
Uttar Pradesh	3	4	7	8	5	-3
Maharashtra	3	3	6	11	11	-
Odisha	3	3	6	11	12	1
Andhra Pradesh	2	4	6	11	15	4
Jharkhand	1	5	6	11	17	6
Nagaland	4	1	5	15	17	2
Karnataka	3	2	5	15	15	-
Telangana	2	2	4	17	20	3
Madhya Pradesh	1	3	4	17	17	-
Gujarat	1	3	4	17	12	-5
Haryana	0	4	4	17	5	-12
Sikkim	3	0	3	21	23	2
Uttarakhand	2	1	3	21	23	2
Himachal Pradesh	2	1	3	21	20	-1
Manipur	2	0	2	24	26	2
Chhattisgarh	1	1	2	24	23	-1
Rajasthan	0	2	2	24	20	-4
Meghalaya	1	0	1	27	26	-1
Jammu & Kashmir	0	1	1	27	26	-1
Mizoram	0	0	0	29	29	-
Arunachal Pradesh	0	0	0	29	29	-

UDAN 3 in January 2019. UDAN 3 will include tourism routes in co-ordination with the Ministry of Tourism, which shall comprise introducing sea plane services to connect water aerodromes on Guwahati Riverfront in Assam, Nagarjuna Sagar in Andhra Pradesh and Telangana, and Statue of Unity in Gujarat, among others, in addition to connecting several routes in the north east region such as Kolkata-Shillong, Guwahati-Lilabari, Guwahati-Tezpur and Guwahati-Passighat.

Since multiple factors come to play when airlines decide which routes to travel and the airports to fly to, including Aviation Turbine Fuel (ATF) charges, taxes on ATF charges (which add 30-40% on an average to the airline's total operating cost), cost of capital, airport parking charges, and labour laws, to name a few, the total aircraft movement is reflective of all such factors. Hence, it is a good indicator of the overall aviation infrastructure in a state.

Figures 30 and 31 present our scoring methodology and illustrate the aircraft movement across states and subsequent rankings for this parameter, respectively.

FIGURE 30: METHODOLOGY FOR AIRCRAFT MOVEMENT

Range	Points
Above 1,99,999	10
1,50,000 to 1,99,999	8
1,00,000 to 1,49,999	6
50,000 to 99,999	4
Below 50,000	2
No Movement	0

Delhi, Maharashtra, Karnataka and Tamil Nadu have continued to feature in the top five since the 2011 survey, with Delhi and Maharashtra collectively accounting for approximately 35% of the aircraft movements in the country. A positive observation here is regarding the states at the bottom of the list – in 2015, there were seven states with no aircraft movement; in 2017 this number shrunk to four states. This year, only Haryana and Arunachal Pradesh have zero aircraft movements because the airports here either remain unserved or require major upgradation – there are plans to make airports in these states operational soon under the UDAN scheme. This obvious growth trajectory bodes well for India's aviation sector and subsequently, its Travel & Tourism.



FIGURE 31: POINT ALLOCATION FOR AIRCRAFT MOVEMENT

State	Total Aircraft Movement*	Points Obtained	Rank 2019	Rank 2017	Rank 2009	Variance (17-19)	Variance (09-19)
Delhi	4,60,429	10	1	1	2	-	1
Maharashtra	4,30,449	10	2	2	1	-	-1
Karnataka	2,68,967	10	3	3	4	-	1
Tamil Nadu	2,37,494	10	4	4	3	-	-1
West Bengal	1,83,556	8	5	5	6	-	1
Telangana	1,79,606	8	6	6	-	-	-6
Kerala	1,32,933	6	7	7	7	-	-
Gujarat	1,12,176	6	8	8	8	-	-
Uttar Pradesh	69,905	4	9	10	13	1	4
Rajasthan	67,194	4	10	12	10	2	-
Andhra Pradesh	66,834	4	11	13	5	2	-6
Assam	60,657	4	12	11	9	-1	-3
Goa	56,946	4	13	9	11	-4	-2
Madhya Pradesh	41,262	2	14	15	14	1	-
Jammu & Kashmir	39,373	2	15	14	12	-1	-3
Bihar	34,390	2	16	16	19	-	3
Odisha	30,390	2	17	17	15	-	-2
Punjab	20,319	2	18	18	17	-	-1
Chhattisgarh	17,149	2	19	19	18	-	-1
Jharkhand	16,869	2	20	21	21	1	1
Uttarakhand	13,017	2	21	20	22	-1	1
Tripura	10,130	2	22	22	16	-	-6
Manipur	10,010	2	23	23	20	-	-3
Himachal Pradesh	4,172	2	24	24	22	-	-2
Mizoram	2,337	2	25	27	22	2	-3
Nagaland	2,213	2	26	25	22	-1	-4
Meghalaya	551	2	27	26	22	-1	-5
Sikkim	328	2	28	27	22	-1	-6
Arunachal Pradesh	0	0	29	27	22	-2	-7
Haryana	0	0	29	27	22	-2	-7

\*Denotes number of take-offs and landings (one flight constitutes two movements)  
Source: Airports Authority of India (Traffic News - Annexure IIC), (Data from Apr-18 to Mar-19)

FIGURE 32: METHODOLOGY FOR LITERACY RATE

Rank	Points
1 to 5	5
6 to 10	4
11 to 15	3
16 to 20	2
21 to 25	1
Above 25	0

FIGURE 33: POINT ALLOCATION FOR LITERACY RATE

State	Literacy Rate	Points Obtained	Rank 2019
Kerala	93.9%	5	1
Mizoram	91.6%	5	2
Tripura	87.8%	5	3
Goa	87.4%	5	4
Delhi	86.3%	5	5
Himachal Pradesh	83.8%	4	6
Maharashtra	82.9%	4	7
Sikkim	82.2%	4	8
Tamil Nadu	80.3%	4	9
Nagaland	80.1%	4	10
Manipur	79.9%	3	11
Uttarakhand	79.6%	3	12
Gujarat	79.3%	3	13
West Bengal	77.1%	3	14
Punjab	76.7%	3	15
Haryana	76.6%	2	16
Karnataka	75.6%	2	17
Meghalaya	75.5%	2	18
Odisha	73.5%	2	19
Assam	73.2%	2	20
Chhattisgarh	71.0%	1	21
Madhya Pradesh	70.6%	1	22
Uttar Pradesh	69.7%	1	23
Jammu & Kashmir	68.7%	1	24
Jharkhand	67.6%	1	25
Andhra Pradesh	67.4%	0	26
Rajasthan	67.1%	0	27
Arunachal Pradesh	67.0%	0	28
Telangana*	66.5%	0	29
Bihar	63.8%	0	30

\*From Statistical Year Book, 2017, Telangana  
Source: Office of Registrar General, India.

10% and above (irrespective of land use and legal status), but also Tree Cover that includes small patches of trees in less than one hectare of area, such as plantations, compact blocks in cities or trees along roads, canals, etc.

According to the 2017 report by Forest Survey of India (most recent), the total Forest Cover of the country is 7,08,273 sq km, which is 21.54% of the geographical area of India. State wise, Madhya Pradesh, Arunachal Pradesh, Chhattisgarh, Odisha and Maharashtra rank the highest in terms of total Forest Cover, in that order. On the other hand, Maharashtra, Rajasthan, Madhya Pradesh, Gujarat and Jammu & Kashmir top the list for total Tree Cover.

Since the rankings for this parameter are based on Green Cover per 100 sq km (cumulative density of Forest Cover and Tree Cover), many states despite having large forest or tree covers, rank low because of their sheer size in terms of total geographical area.

FIGURE 34: METHODOLOGY FOR GREEN COVER

Rank	Points
1 to 5	20
6 to 10	17
11 to 15	14
16 to 20	11
21 to 25	8
Above 25	5

## Literacy Rate

Literacy rate is an important indicator of socio-economic development of a state. With respect to Travel & Tourism, literacy has an indirect impact. For that reason, we have attributed less weightage (5%) to this parameter.

Figures 32 and 33 present our ranking methodology along with the performance of the states in this parameter, respectively.

The literacy rates have been drawn from the last Census carried out in India (2011), which is a decadal exercise. Therefore, the state rankings remain unchanged from the last edition of this survey.

India has been progressing in various development indicators, including the literacy rate. The country's literate population was recorded at 74% of the total population in 2011, with the male literacy rate at 82.1% and female literacy rate at 65.5%. At the state level, Kerala, Mizoram, Tripura and Goa currently have the highest literacy rates, whereas Bihar, Telangana, Arunachal Pradesh, Rajasthan and Andhra Pradesh constitute the bottom five.

## Green Cover

One of the challenges associated with the development of Travel & Tourism is ecological degradation. Often infrastructural developments, such as airports, railway lines, highways, hotels, and other forms of establishments are constructed near ecologically sensitive areas that results in deforestation and loss of tree cover. While this may seem necessary, a balance needs to be struck between development and environmental sustainability. Hence, this year, for the first time, we have introduced Green Cover as a parameter to evaluate the states in this survey.

Within this criterion, we have not only accounted for Forest Cover, which includes all areas more than one hectare having a tree canopy density of



FIGURE 35: POINT ALLOCATION FOR GREEN COVER

State	Geographical Area (Km <sup>2</sup> )	Total Tree Cover Area (Km <sup>2</sup> )	Total Forest Cover Area (Km <sup>2</sup> )	Total Green Cover Area (Km <sup>2</sup> )	Green Cover per 100 Km <sup>2</sup>	Points Obtained	Rank 2019
Mizoram	21,081	467	18,186	18,653	88	20	1
Arunachal Pradesh	83,743	807	66,964	67,771	81	20	2
Meghalaya	22,429	657	17,146	17,803	79	20	3
Manipur	22,327	220	17,346	17,566	79	20	4
Nagaland	16,579	379	12,489	12,868	78	20	5
Tripura	10,486	215	7,726	7,941	76	17	6
Goa	3,702	323	2,229	2,552	69	17	7
Kerala	38,852	2,959	20,321	23,280	60	17	8
Sikkim	7,096	35	3,344	3,379	48	17	9
Uttarakhand	53,483	767	24,295	25,062	47	17	10
Chhattisgarh	1,35,192	3,833	55,547	59,380	44	14	11
Assam	78,438	1,496	28,105	29,601	38	14	12
Odisha	1,55,707	3,993	51,345	55,338	36	14	13
Jharkhand	79,716	2,922	23,553	26,475	33	14	14
Himachal Pradesh	55,673	822	15,100	15,922	29	14	15
Madhya Pradesh	3,08,252	8,073	77,414	85,487	28	11	16
Tamil Nadu	1,30,060	4,671	26,281	30,952	24	11	17
Karnataka	1,91,791	5,713	37,550	43,263	23	11	18
West Bengal	88,752	2,136	16,847	18,983	21	11	19
Telangana	1,12,077	2,669	20,419	23,088	21	11	20
Delhi	1,484	113	192	305	21	8	21
Maharashtra	3,07,713	9,831	50,682	60,513	20	8	22
Andhra Pradesh	1,62,968	3,753	28,147	31,900	20	8	23
Jammu & Kashmir	2,22,236	7,815	23,241	31,056	14	8	24
Gujarat	1,96,244	8,024	14,757	22,781	12	8	25
Bihar	94,163	2,263	7,299	9,562	10	5	26
Uttar Pradesh	2,40,928	7,442	14,679	22,121	9	5	27
Rajasthan	3,42,239	8,266	16,572	24,838	7	11	28
Punjab	50,362	1,622	1,837	3,459	7	5	29
Haryana	44,212	1,415	1,588	3,003	7	5	30

Note: Hotelivate has allocated more points to Rajasthan, making an exception on account of it being a desert state  
Source: State of Forest Report, 2017; Forest Survey of India

## Ease of Doing Business

Creating a more enabling environment to launch and conduct business is critical for economic development. India has been making improvements in this area as indicated by its rise in rankings in World Bank's annual Doing Business Report. In the 2020 edition, India was amongst the top 10 improvers, leaping 14 places to rank 63 among 190 countries over last year; India has moved up 57 places since 2016. This is primarily on account of the country's strong performance in areas such as protecting minority investors, dealing with construction permits, getting electricity, getting credit, and trading across borders.

In order to create a more conducive business environment in the country, the Department of Promotion of Industry and Internal Trade (DPIIT) has taken several steps to streamline and rationalize regulatory processes and introduce information technology to make governance more efficient and effective. States and union territories too have been included in this effort by identifying individual constraints in doing business and formulating the necessary reforms required in each state. The most recent assessment of Business Reforms Action Plan was released jointly by DPIIT and the World Bank in July 2018.

As per the release, Andhra Pradesh continued to rank first, while Haryana, Jharkhand, Karnataka and West Bengal improved their rankings considerably since the last survey. Notably, Delhi has witnessed a continuous descent over the years. From the 15<sup>th</sup> position in 2015, it slid to 19<sup>th</sup> in 2017, and achieving a score of just 31.69%, it is 23<sup>rd</sup> on the list this year. On the brighter side, in the 2017 survey, 12 states achieved a score of 90% or more; in this edition, 15 states achieved this feat, thus

raising the bar for all the states in the country. Meanwhile, amongst the bottom ranked states, Assam improved significantly, achieving a score of 84.75% in 2019 (against 14.3% in 2017), but other northeastern states continue to be lackadaisical with abysmally low scores.

Figures 36 and 37 present our ranking methodology and the results of this assessment, respectively.

## Intangible Aspects

Travel & Tourism is vulnerable to any change in situations pertaining to (i) Safety and Security (law and order conditions and safety); (ii) Human Resources (availability of qualified/skilled human resources for Travel & Tourism); and (iii) Political Stability (tenure of the ruling party, and development policies of the current government). Thus, the final parameter of this survey aims to capture these intangible aspects that may either support or hinder the Travel & Tourism attractiveness of a place. A cumulative weightage of 15 has been allocated to the intangible aspects, thereby restricting the impact of subjective assessment.

Figure 38 presents our assessment of the intangible aspects for all states.

Gujarat, Himachal Pradesh, Punjab, Sikkim and Rajasthan are the frontrunners with respect to scoring on intangible aspects. Amongst these states, Sikkim stands out, as it has made a significant improvement in its rankings this year, moving up 13 places. Historically, the state has always been politically stable and, hence, been given full points in this criterion; however, it lacked in the areas of security and human resources. In this edition, with the lowest number of crimes in the country, the state has scored full points on the security front. It, thus, languishes only in terms of availability of talent for Travel & Tourism despite having one of the highest literacy rates in the country.



FIGURE 36: METHODOLOGY FOR EASE OF DOING BUSINESS

Rank	Points
1 to 5	10
6 to 10	8
11 to 15	6
16 to 20	4
21 to 25	2
Above 25	0

FIGURE 37: POINT ALLOCATION FOR EASE OF DOING BUSINESS

State	Ease of Doing Business Score	Points Obtained	Rank 2019	Rank 2017	Variance (17-19)
Andhra Pradesh	98.30%	10	1	1	-
Telangana	98.28%	10	2	1	-1
Haryana	98.06%	10	3	6	3
Jharkhand	98.05%	10	4	7	3
Gujarat	97.99%	10	5	3	-2
Chhattisgarh	97.31%	8	6	4	-2
Madhya Pradesh	97.30%	8	7	5	-2
Karnataka	96.42%	8	8	13	5
Rajasthan	95.70%	8	9	8	-1
West Bengal	94.59%	8	10	15	5
Uttarakhand	94.24%	6	11	9	-2
Uttar Pradesh	92.89%	6	12	14	2
Maharashtra	92.88%	6	13	10	-3
Odisha	92.08%	6	14	11	-3
Tamil Nadu	90.68%	6	15	18	3
Himachal Pradesh	87.90%	4	16	17	1
Assam	84.75%	4	17	23	6
Bihar	81.91%	4	18	16	-2
Goa	57.34%	4	19	21	2
Punjab	54.36%	4	20	12	-8
Kerala	44.82%	2	21	20	-1
Jammu & Kashmir	32.76%	2	22	28	6
Delhi	31.69%	2	23	19	-4
Tripura	22.45%	2	24	22	-2
Nagaland	14.16%	2	25	24	-1
Mizoram	3.66%	0	26	26	-
Manipur	0.27%	0	27	25	-2
Sikkim	0.14%	0	28	27	-1
Arunachal Pradesh	0.00%	0	29	28	-1
Meghalaya	0.00%	0	29	28	-1

Source: Department of Industrial Policy & Promotion, Annual Report 2018-19

FIGURE 38: POINT ALLOCATION FOR INTANGIBLE ASPECTS

State	Points Obtained	Security (5)	HR (5)	Political Stability (5)	Rank 2019	Rank 2017	Variance (17-19)
Gujarat	13	4	4	5	1	2	1
Himachal Pradesh	13	5	3	5	1	2	1
Punjab	13	4	4	5	1	5	4
Sikkim	13	5	3	5	1	14	13
Rajasthan	12	4	4	4	5	2	-3
Andhra Pradesh	12	3	4	5	5	5	-
Odisha	12	4	3	5	5	5	-
Telangana	12	3	5	4	5	5	-
Maharashtra	11	3	5	3	9	1	-8
Haryana	11	3	4	4	9	5	-4
Delhi	11	3	5	3	9	5	-4
Tamil Nadu	11	3	5	3	9	5	-4
Goa	11	4	4	3	9	14	5
Tripura	11	4	2	5	9	14	5
Uttar Pradesh	11	3	3	5	9	14	5
Uttarakhand	11	4	3	4	9	14	5
Kerala	11	3	4	4	9	19	10
Manipur	11	4	2	5	9	19	10
Mizoram	11	5	2	4	9	19	10
Karnataka	10	3	5	2	20	5	-15
Assam	10	3	2	5	20	19	-1
Nagaland	10	5	2	3	20	23	3
West Bengal	10	3	4	3	20	23	3
Arunachal Pradesh	10	5	2	3	20	28	8
Madhya Pradesh	9	3	3	3	25	5	-20
Chhattisgarh	9	3	2	4	25	23	-2
Jharkhand	9	3	2	4	25	23	-2
Meghalaya	9	4	2	3	25	23	-2
Bihar	9	3	2	4	25	30	5
Jammu & Kashmir	8	2	3	3	30	28	-2

Source: Hotelivate Research

In terms of security, Himachal Pradesh, Sikkim, Mizoram, Nagaland and Arunachal Pradesh are rated the best amongst all states owing to lower crime rates and incidences. And by the virtue of having a greater number of metropolitan and Tier-I cities with many educational institutions,

corporate setups and higher literacy rate, states such as Maharashtra, Delhi, Tamil Nadu, Telangana and Karnataka are rated the best in terms of availability of a strong talent pool. Lastly, with many states having stable governments at the helm, a large number of them have been allocated 5 points, while those that have faced recent political turmoil have been allocated 3 points. Karnataka, dropped 15 places in this ranking parameter purely on account of political instability, as the government in power is fragile. The other state which descended significantly in the rankings is Madhya Pradesh owing to the recent law and order situation and a volatile political scenario.

## State Ranking: North Eastern States

For a very long time, the north eastern states were overlooked in terms of Travel & Tourism chiefly owing to the on-ground security situation, distance from the heartland, limited accessibility and inadequate supply of quality accommodation. However, the current central government has prioritised the development of this region as part of its "Act East" policy, which entails transforming north eastern states into a gateway to South East Asia.

While each north eastern state has something unique to offer, they are unable to compete at par with the other states and have lagged in the overall rankings across parameters owing to myriad challenges. Hence, in our last survey, we decided to additionally assess the competitiveness of the north eastern states with each other as against simply reviewing their rankings within the larger group of 30 states across the country.

Figures 39, 40 and 41 present the best performing north eastern states this year.

FIGURE 39: PERFORMANCE BASED RANK

State	North Eastern Rank 2019
Sikkim	1
Tripura	2
Mizoram	3

FIGURE 40: BIGGEST MOVERS 2017 TO 2019

State	All-India Rank 2019	All-India Rank 2017	Variance (17-19)
Tripura	22	24	2
Meghalaya	24	30	6
Sikkim	15	22	7

Source: Hotelivate Research

FIGURE 41: BIGGEST MOVERS 2009 TO 2019

State	All-India Rank 2019	All-India Rank 2009	Variance (09-19)
Tripura	22	28	6
Meghalaya	24	29	5
Nagaland	26	22	-4
Arunachal Pradesh	30	14	-16
Manipur	29	25	-4
Sikkim	15	8	-7

Source: Hotelivate Research

Sikkim, Tripura and Mizoram secured the top three places amongst the north eastern states in the 2019 edition. Sikkim, while retaining its top spot in the region, also improved its All-India rank substantially, moving up seven places since the last survey. Displacing Mizoram, Tripura finished second, performing better than its counterparts in the parameters of tourist visits, road and railway infrastructure, ease of doing business, and intangible aspects. Arunachal Pradesh, on the contrary, ranked the lowest both among the north eastern states as well as nationwide, since it could not secure any points for six of the 12 parameters considered in this survey.





FIGURE 42: CONSOLIDATED RANKINGS

State	Weight	Expenditure on Tourism	Tourist Visits	Presence of Branded Hotel Rooms	GSDP Per Capita	Effectiveness of Marketing Campaign		Road and Railway Infrastructure		Aircraft Movement	Literacy Rate	Green Cover	Ease of Doing Business		Intangible Aspects	Total	Rank										Variance (17-19)	Variance (09-19)							
						Urbanisation	Marketing Campaign	Infrastructure	Railway				10	15			10	10	10	10	10	10	10	10	10	10			10	10	10	10			
Goa	25.0	14.0	10.0	10.0	10.0	8.0	6.0	7.0	4.0	5.0	17.0	4.0	11.0	121.0	1	2	3	2	3	1	2	3	2	3	1	2									
Tamil Nadu	5.0	30.0	8.0	10.0	10.0	4.0	4.0	8.0	10.0	4.0	11.0	6.0	11.0	111.0	2	4	5	7	4	1	2	4	5	7	4	1									
Delhi	5.0	23.0	10.0	10.0	10.0	6.0	10.0	10.0	10.0	5.0	8.0	2.0	11.0	110.0	3	1	2	1	3	6	3	1	2	1	3	6									
Maharashtra	5.0	30.0	6.0	10.0	10.0	7.0	4.0	6.0	10.0	4.0	8.0	6.0	11.0	107.0	4	2	1	2	1	4	4	2	1	2	1	4									
Kerala	5.0	17.0	8.0	10.0	10.0	10.0	4.0	9.0	6.0	5.0	17.0	2.0	11.0	104.0	5	6	7	5	6	2	1	6	7	5	6	2									
Gujarat	10.0	20.0	4.0	10.0	10.0	8.0	4.0	4.0	6.0	3.0	8.0	10.0	13.0	100.0	6	5	5	4	7	9	3	5	4	7	9	3									
West Bengal	5.0	24.0	4.0	10.0	10.0	5.0	2.0	9.0	8.0	3.0	11.0	8.0	10.0	99.0	7	8	11	12	14	13	1	8	11	12	14	13	1	6							
Karnataka	5.0	23.0	8.0	10.0	10.0	1.0	4.0	5.0	10.0	2.0	11.0	8.0	10.0	97.0	8	7	4	5	4	12	4	7	4	5	4	12	4	1	4						
Telangana	5.0	20.0	6.0	10.0	10.0	6.0	4.0	4.0	8.0	0.0	11.0	10.0	12.0	96.0	9	13	10				4	13	10				4			4					
Uttarakhand	15.0	13.0	4.0	10.0	10.0	9.0	2.0	3.0	2.0	3.0	17.0	6.0	11.0	95.0	10	12	18	9	8	7	2	12	18	9	8	7	2	1	7	2	-3				
Rajasthan	5.0	27.0	2.0	10.0	10.0	9.0	2.0	2.0	4.0	0.0	11.0	8.0	12.0	92.0	11	11	14	13	13	11	-	11	14	13	13	11	-	-	-	-	-				
Punjab	10.0	20.0	6.0	10.0	10.0	1.0	4.0	9.0	2.0	3.0	5.0	4.0	13.0	87.0	12	9	8	11	11	15	3	9	8	11	11	15	3	1	15	3	3				
Uttar Pradesh	5.0	30.0	2.0	7.5	5.0	5.0	2.0	7.0	4.0	1.0	5.0	6.0	11.0	85.5	13	13	12	15	12	19	-	13	12	15	12	19	-	-	-	-	6				
Andhra Pradesh	10.0	20.0	0.0	10.0	10.0	3.0	2.0	6.0	4.0	0.0	8.0	10.0	12.0	85.0	14	10	14	14	15	10	-4	10	14	14	15	10	-4	-4	-4	-4	-4				
Sikkim	25.0	4.0	2.0	10.0	10.0	2.0	2.0	3.0	2.0	4.0	17.0	0.0	13.0	84.0	15	22	8	8	9	8	7	22	8	8	9	8	7	1	8	9	8	7	-7		
Himachal Pradesh	15.0	13.0	0.0	10.0	10.0	4.0	0.0	3.0	2.0	4.0	14.0	4.0	13.0	82.0	16	19	21	15	17	17	3	19	21	15	17	17	3	1	17	17	3	1			
Madhya Pradesh	5.0	20.0	0.0	10.0	10.0	6.0	2.0	4.0	2.0	1.0	11.0	8.0	9.0	78.0	17	15	16	18	18	15	-2	15	16	18	18	15	-2	-2	-2	-2	-2	-2			
Odisha	5.0	10.0	0.0	10.0	10.0	6.0	0.0	6.0	2.0	2.0	14.0	6.0	12.0	73.0	18	21	19	19	20	17	3	21	19	19	20	17	3	1	19	20	17	3	-1		
Jammu & Kashmir	25.0	10.0	0.0	10.0	10.0	4.0	2.0	1.0	2.0	2.0	8.0	2.0	8.0	73.0	18	17	17	10	10	5	-1	17	17	10	10	5	-1	-1	-1	-1	-1	-1			
Jharkhand	5.0	13.0	0.0	7.5	5.0	1.0	2.0	6.0	2.0	1.0	14.0	10.0	9.0	70.5	20	24	23	29	25	24	4	24	23	29	25	24	4	4	23	29	25	24	4	4	
Haryana	5.0	4.0	10.0	10.0	10.0	4.0	2.0	4.0	0.0	2.0	5.0	10.0	11.0	67.0	21	16	13	17	16	21	-5	16	13	17	16	21	-5	-5	-5	-5	-5	-5			
Tripura	5.0	2.0	0.0	10.0	10.0	2.0	2.0	7.0	2.0	5.0	17.0	2.0	11.0	65.0	22	24	29	23	23	28	2	24	29	23	23	28	2	6	23	23	28	28	2	6	
Mizoram	5.0	0.0	0.0	10.0	10.0	5.0	6.0	0.0	2.0	5.0	20.0	0.0	11.0	64.0	23	23	22	21	21	22	-	23	22	21	21	22	-	-	-	-	-	-	-1		
Meghalaya	10.0	4.0	0.0	10.0	10.0	2.0	2.0	1.0	2.0	2.0	20.0	0.0	9.0	62.0	24	30	30	28	29	29	6	30	30	28	29	29	6	5	30	30	28	29	29	6	5
Assam	5.0	4.0	0.0	7.5	5.0	3.0	0.0	8.0	4.0	2.0	14.0	4.0	10.0	61.5	25	26	28	25	27	26	1	26	28	25	27	26	1	1	26	28	25	27	26	1	1
Bihar	5.0	20.0	0.0	5.0	5.0	2.0	0.0	9.0	2.0	0.0	5.0	4.0	9.0	61.0	26	18	20	20	19	19	-8	18	20	20	19	19	-8	-8	-8	-8	-8	-8	-8		
Chhattisgarh	5.0	5.0	0.0	10.0	10.0	3.0	2.0	2.0	2.0	1.0	14.0	8.0	9.0	61.0	26	20	27	27	28	27	-6	20	27	27	28	27	-6	-6	-6	-6	-6	-6	-6		
Nagaland	5.0	0.0	0.0	10.0	10.0	1.0	2.0	5.0	2.0	4.0	20.0	2.0	10.0	61.0	26	27	26	21	23	22	1	27	26	21	23	22	1	1	27	26	21	23	22	1	1
Manipur	10.0	0.0	0.0	7.5	5.0	2.0	2.0	2.0	2.0	3.0	20.0	0.0	11.0	59.5	29	28	25	25	26	25	-4	28	25	25	26	25	-4	-4	-4	-4	-4	-4	-4	-4	
Arunachal Pradesh	15.0	0.0	0.0	10.0	10.0	2.0	2.0	0.0	2.0	0.0	20.0	0.0	10.0	59.0	30	29	24	24	22	14	-1	29	24	24	22	14	-1	-1	-1	-1	-1	-1	-1	-1	

## All-India The Biggest Movers

Here we have highlighted the comparative ranking of states that have either made significant improvements or deteriorated since the last survey in 2017 (Figure 43) and over the past decade (Figure 44).

FIGURE 43: BIGGEST MOVERS 2017 TO 2019

State	Rank 2019	Rank 2017	Variance (17-19)
Sikkim	15	22	7
Meghalaya	24	30	6
Jharkhand	20	24	4
Telangana	9	13	4
Bihar	26	18	-8
Chhattisgarh	26	20	-6
Punjab	12	9	-3
Haryana	21	16	-5
Andhra Pradesh	14	10	-4

Source: Hotelivate Research

FIGURE 44: BIGGEST MOVERS 2009 TO 2019

State	Rank 2019	Rank 2009	Variance (09-19)
West Bengal	7	13	6
Uttar Pradesh	13	19	6
Jharkhand	20	24	4
Tripura	22	28	6
Meghalaya	24	29	5
Karnataka	8	12	4
Sikkim	15	8	-7
Jammu & Kashmir	18	5	-13
Bihar	26	19	-7
Nagaland	26	22	-4
Manipur	29	25	-4
Arunachal Pradesh	30	14	-16
Andhra Pradesh	14	10	-4

Source: Hotelivate Research

Among the biggest movers, the case of Sikkim is quite intriguing. The state consistently ranked in the top 10 until 2015; then, in 2017 it slipped many places largely due to implementation of GST, lower state expenditure on tourism, marginal improvement in road and railway infrastructure and poor ease of doing business ranking. However, 2019 has turned out to be a year of redemption for the state, whereby it has improved its rankings considerably in the parameters of state expenditure on tourism, aircraft movement, intangible aspects and green cover.

Another state that has shown marked improvement over the last survey is Meghalaya. It jumped six places to rank 24<sup>th</sup> this year on account of improvement in state expenditure on tourism, more number of tourist visits, improvement in GSDP per capita and effectiveness of marketing campaign.

On the contrary, states such as Bihar and Chhattisgarh slipped in the rankings due to lower scores in the areas of state expenditure on tourism and effectiveness of marketing campaign, both, in comparison to the rest of the states as well as the 2017 figures. It is important to highlight that while Bihar maintained its standing in terms of GSDP per capita and improved tourist visits and intangible aspects, Chhattisgarh continued to put a dismal show, not making any improvements in any parameter since 2017.

In terms of a 10-year comparative, Jammu & Kashmir and Arunachal Pradesh have steeply declined by 13 and 16 places, respectively. This is predominantly because both these states have not been able to make any progress on many of the parameters considered in this survey. Even though Jammu & Kashmir made marginal improvement in state expenditure on tourism (as a percentage of total expenditure), due to the ongoing political and security crises, the number of tourist visits has declined and the state has underperformed in the areas of road and railway infrastructure and aircraft movements as well.

## The Top Five

### Goa

Coming either second or third in the consolidated state rankings for a decade, Goa has managed to top the charts for the first time this year. The state outperformed its peers predominantly on account of higher expenditure on tourism, though in comparison to the previous survey, it actually slashed its spending by 7.6%. In addition, Goa also reduced its expenditure on marketing and publicity by around 30% over the 2017 figures, but was able to maintain its 9<sup>th</sup> rank in this parameter owing to the relative performance of the other states.

On the other hand, Goa registered a notable improvement in the absolute number of aircraft movements, earning higher points in this parameter than the last survey (though it currently ranks lower than in 2017 because of the improvement in rankings of the other states). Going forward, due to the current impasse over MOPA Airport for environmental reasons, it remains to be seen whether Goa can improve in this parameter by finding a solution in the coming years.

Furthermore, the addition of the new parameter 'Green Cover' in this year's survey, in which Goa ranks 7<sup>th</sup>, has helped the state propel to the number 1 position in the rankings.

### Tamil Nadu

Another state which sprung a surprise this year is Tamil Nadu. While its ranking has oscillated from number 1 in 2009 to number 4 in 2017, the state came in second by displacing Maharashtra and Delhi in 2019. This can be primarily attributed to an improvement in Tamil Nadu's performance in effectiveness of marketing campaign, aircraft movement and ease of doing business. Moreover, the state outshines its peers in terms of tourist visits, consistently ranking first across editions – mainly due to it being a popular pilgrimage destination.

The other major parameters where the state performs relatively well and ranks in the top 10 are presence of branded hotel rooms, GSDP per capita, urbanisation, road and rail infrastructure, aircraft movement and literacy rate. On the flip side, Tamil Nadu continues to rest at the bottom of the rankings for expenditure on tourism.

### Delhi

From its 6<sup>th</sup> rank in 2009, Delhi made swift progress in the following years and climbed atop the rankings in 2017, before losing the coveted place to Goa in this year's survey.

The state performs well in parameters such as presence of branded hotel rooms, GSDP per capita, urbanisation, road and rail infrastructure, aircraft movement and literacy rate. However, it needs to drastically improve its standing in ease of doing business – being the nation's capital and housing many government offices, it is startling to see that the state struggles to provide an encouraging and simplified ecosystem to start and conduct business. Additionally, Delhi needs to improve its expenditure on tourism, security, and effectiveness of marketing campaign to make the state more attractive for tourists.

### Maharashtra

Home to the financial capital of India 'Mumbai', the state has returned to its 2009 standing in the survey this year, at number 4. Maharashtra slipped in the rankings from number 2 in 2017, as it scored lower in parameters such as green cover, ease of doing business and intangible aspects vis-à-vis its peers. Moreover, it is pertinent to note that the state tourism department has collaborated with a media entity (IBN – Lokmat) as part of its strategy to promote and market the tourism potential of the state. Yet, in comparison to other states, Maharashtra lags in this parameter.

### Kerala

Kerala underwent the worst flood crisis in recent times, resulting in the government reducing its capital and revenue expenditure on tourism. Yet, the state moved up one place to rank 5<sup>th</sup> in the current edition of this survey on the back of improvements in effectiveness of marketing campaign and its vast green cover.





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