

IN ASSOCIATION WITH

WORLD  
TRAVEL &  
TOURISM  
COUNCIL  
INDIA INITIATIVE

**HOTELIVATE**  
ELEVATION THROUGH INNOVATION



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# INTRODUCTION

The India State Ranking Survey, by Hotelivate in collaboration with the World Travel and Tourism Council, India Initiative (WTTICII), is a biennial report that evaluates the competitive standing of the nation's 28 states and 2 Union Territories (Figure 1) regarding their travel & tourism potential on 14 identified parameters. This is the 7<sup>th</sup> edition of the report since its inception in 2009, with the exception of the COVID-19 pandemic year 2021. India's diversity, cultural richness, and robust economy, driven by a sizable youth population, make it an appealing destination for both domestic and international strategic investments. India ranks 9<sup>th</sup> out of all G20 countries, signalling that although the travel and tourism sector is well established, ongoing developments in policy, tourist infrastructure, safety, health, technology adaptation, and environmental sustainability continue to hold potential for improvement.

FIGURE 1: 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

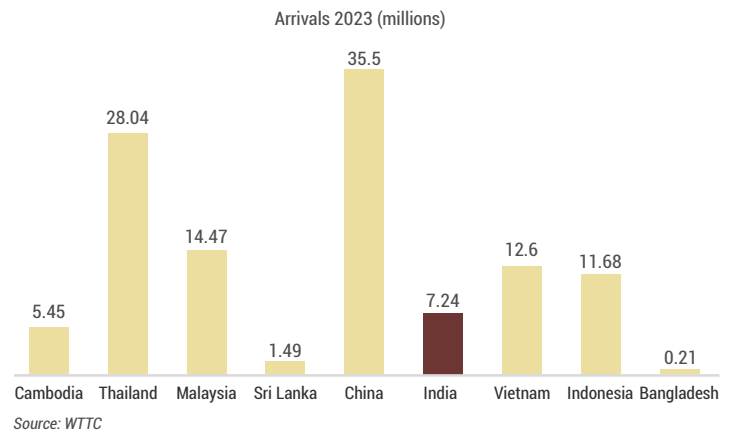
\*Does not include Gurugram, NOIDA, Greater NOIDA, Ghaziabad & Faridabad

During the G20 Tourism Ministers' Meet in Goa, the Prime Minister highlighted India's commitment to tourism, emphasising the development of transport infrastructure, hospitality, skill enhancement, and streamlined visa processes. The G20 presidency in 2023, with meetings held across 60 domestic destinations, allowed India to showcase its diverse tourism offerings globally. Initiatives like the Swadesh Darshan scheme, aimed at developing comprehensive tourism packages for 50 destinations, and schemes like M-visa and PRASHAD for medical and spiritual tourism, underscore the government's focus. Recent visa reforms, including the golden visa scheme, green residency, and new entry permits align with the tourism vision.

In terms of international tourist arrivals, a total of over 230 million international arrivals were recorded in 2023 in the Asia Pacific region, of which India accounted for 7.2 million. Figure 2 highlights the comparative international arrivals in select countries in the Asia Pacific region. Countries such as Vietnam and China were ahead of India in this aspect. However, the outlook for the tourism industry remains optimistic. According to the WTTTC, the Travel & Tourism sector contributed US\$1.3 trillion to the overall GDP of the Asia Pacific region in 2022/23. As travel rebounds, this sector's contribution is predicted to reach US\$2.6 trillion in FY 2023. However, the region remains behind its highpoint in 2019.

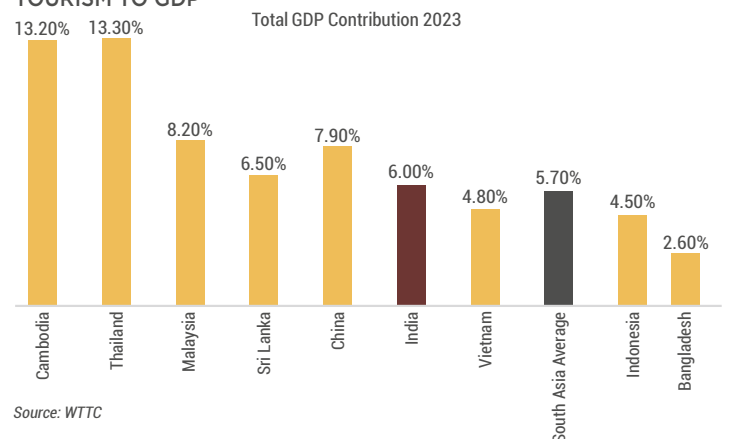
The direct economic contribution of the Travel & Tourism sector in India stood at US\$247 billion in 2022, largely driven by domestic travel expenditure accounting for 87% of the tourism spend. Additionally, the industry generated 35 million jobs in 2022/23, exhibiting an 8.3% growth over the last year, with a projected increase to 53 million over the next decade.

FIGURE 2: ASIA PACIFIC - INTERNATIONAL TOURIST ARRIVALS



India continues to grow and become a prominent tourism destination with the sector contributing 6% to the country's overall GDP, higher than the average for the Asia Pacific region. Figure 3 shows the comparative contribution of the Travel & Tourism sector to countries' overall GDP.

FIGURE 3: RELATIVE TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP



The Travel & Tourism industry, comprising hotels, airlines, and travel companies, is multifaceted. The India State Ranking Survey specifically focuses on the hospitality sector, using 14 key parameters to identify the best-performing states. In addition to the parameters used in the 2019 edition, Cleanliness and Smart City Initiatives were added this year for a more comprehensive review of the states. The report outlines the methodology for data collection and presents the sample set of states covered. Figure 4 details the 14 parameters and their respective weightages, highlighting their 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
Intangibles	15	Medium
Presence of Branded Hotel Rooms	13	Medium
GSDP per Capita	10	Medium
Effectiveness of Marketing Campaign	10	Medium
Urbanisation	10	Medium
Road & Railway Infrastructure	10	Medium
Aircraft Movement	10	Medium
Ease of Doing Business	10	Medium
Cleanliness	10	Medium
Literacy Rate	5	Low
Smart City Initiatives	5	Low
<b>Total</b>	<b>183</b>	

# STATE EXPENDITURE ON TOURISM

In contrast to the previous edition, the focus on tourism has significantly increased for states. While overall state expenditure witnessed a 25% growth in 2022/23 compared to 2018/19, capital expenditure on tourism surged by almost 120%, and revenue expenditure increased by 14% during the same period. The states' expenditure on tourism now varies between 2.36% and 0.01% of total expenditure, marking a notable increase in the upper limit from 2018/19. **Telangana demonstrated a remarkable shift, advancing from the 27th to the 6th position, more than doubling its tourism spending.** On the other hand, Punjab experienced a contrasting trend, dropping from the 9th to the last position.

To gauge the states' commitment to tourism, we calculated the expenditure on tourism as a percentage of capital expenditure and as a percentage of revenue expenditure. This assessment allowed us to evaluate the overall financial commitment of each state government towards the development of tourism. Figures 5 and 6

illustrate our point allocation methodology and the ranking of states based on this parameter, respectively. This parameter held significant weight at 25 points, offering valuable insights into the priorities and allocations made by each state for the establishment and upkeep of their tourism facilities.

FIGURE 5: IDENTIFIED PARAMETERS AND ASSIGNED WEIGHTS

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

FIGURE 6: POINT ALLOCATION FOR STATE EXPENDITURE ON TOURISM

State	Revenue Expenditure* (₹lakhs)		Capital Expenditure** (₹lakhs)		Total Expenditure (₹lakhs)		Tourism as a % of Total Expenditure	Points Obtained	Rank				Variance		
	All Sectors	Tourism	All Sectors	Tourism	All Sectors	Tourism			2024	2019	2013	2009	(19-24)	(13-24)	(09-24)
Sikkim	8,23,410	4,819	2,75,399	21,093	10,98,809	25,913	2.36%	25	1	2	1	2	1	-	1
Goa	17,70,620	9,685	4,97,738	15,926	22,68,358	25,611	1.13%	25	2	1	2	3	-1	-	1
Uttarakhand	49,59,420	12,611	10,47,148	22,103	60,06,568	34,714	0.58%	25	3	5	4	4	2	1	1
Jammu & Kashmir	75,00,390	23,584	26,58,567	31,757	1,01,58,957	55,341	0.54%	20	4	3	3	1	-1	-1	-3
Gujarat	1,89,49,370	16,065	38,68,946	84,507	2,28,18,316	1,00,572	0.44%	20	5	8	7	12	3	2	7
Telangana	1,72,82,230	76,983	26,93,402	-	1,99,75,632	76,983	0.39%	15	6	27	0	0	21	-5	-6
Maharashtra	4,50,88,970	1,59,107	72,45,190	21,613	5,23,34,160	1,80,721	0.35%	15	7	17	12	9	10	1	2
Manipur	19,59,370	4,863	8,55,255	3,883	28,14,625	8,747	0.31%	15	8	11	23	11	3	5	3
Arunachal Pradesh	20,59,200	5,171	8,65,701	2,282	29,24,901	7,453	0.25%	15	9	4	16	5	-5	7	-4
Meghalaya	16,14,930	2,795	3,34,277	1,915	19,49,207	4,710	0.24%	10	10	7	9	15	-3	-1	5
Kerala	1,49,18,370	19,674	14,89,362	18,722	1,64,07,732	38,397	0.23%	10	11	19	5	7	8	-6	-4
Odisha	1,46,03,890	20,284	38,31,937	20,900	1,84,35,827	41,184	0.22%	10	12	20	19	19	8	7	7
Mizoram	11,84,080	2,196	2,73,571	947	14,57,651	3,143	0.22%	10	13	18	18	10	5	5	-3
Bihar	2,29,38,240	18,202	39,67,505	33,000	2,69,05,745	51,202	0.19%	10	14	16	14	18	2	-	4
Uttar Pradesh	4,24,90,930	13,577	1,26,60,111	87,397	5,51,51,041	1,00,974	0.18%	10	15	15	22	25	-	7	10
Himachal Pradesh	45,11,550	2,784	6,31,116	6,297	51,42,666	9,081	0.18%	10	16	6	11	18	-10	-5	2
Jharkhand	73,96,700	6,241	14,23,811	8,000	88,20,511	14,241	0.16%	10	17	14	27	7	-3	10	-10
Nagaland	14,12,550	2,509	3,10,839	165	17,23,389	2,675	0.16%	10	18	22	8	6	4	-10	-12
Karnataka	2,18,35,610	18,052	52,76,592	15,700	2,71,12,202	33,752	0.12%	10	19	12	6	18	-7	-13	-1
Chhatisgarh	95,24,710	5,148	17,07,942	8,376	1,12,32,652	13,524	0.12%	10	20	25	13	12	5	-7	-8
Haryana	1,15,00,750	5,088	14,64,562	8,788	1,29,65,312	13,876	0.11%	10	21	28	25	25	7	4	4
Madhya Pradesh	2,02,46,780	11,665	45,46,851	13,188	2,47,93,631	24,853	0.10%	10	22	24	17	14	2	-5	-8
Rajasthan	2,48,09,680	21,539	29,14,121	5,635	2,77,23,801	27,174	0.10%	5	23	23	21	18	-	-2	-5
Tripura	20,78,680	1,448	3,29,513	800	24,08,193	2,248	0.09%	5	24	30	29	18	6	5	-6
Assam	1,26,63,550	6,273	24,96,194	7,804	1,51,59,744	14,077	0.09%	5	25	26	24	25	1	-1	-
Delhi	53,29,600	5,132	10,24,461	5	63,54,061	5,137	0.08%	5	26	13	10	13	-13	-16	-13
West Bengal	2,34,27,560	5,748	21,46,837	10,080	2,55,74,397	15,828	0.06%	5	27	21	20	25	-6	-7	-2
Andhra Pradesh	2,05,55,600	3,891	16,84,669	6,789	2,22,40,269	10,680	0.05%	5	28	10	28	18	-18	-	-10
Tamil Nadu	2,76,13,570	3,696	38,34,739	5,157	3,14,48,309	8,853	0.03%	5	29	29	26	16	-	-3	-13
Punjab	1,17,45,400	768	8,51,320	76	1,25,96,720	845	0.01%	5	30	9	15	29	-21	-15	-1

\*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 2022-23

# TOURIST VISITS

Tourist visits serve as a key indicator to assess the allure and demand of a state. In India, each state offers a unique blend of cultural, architectural, and environmental attractions. In 2022, domestic tourist movements in India reached 170 crores, marking a 12% increase from the previous edition. International tourist visits also grew exponentially compared to 2021 as travel restrictions were eased worldwide, although they are still below the 2019 levels, indicating ongoing recovery. Figure 9 illustrates the point allocation for this parameter.

Notably, Gujarat experienced the most significant upward shift in rankings, moving up by 7 positions. States like Tamil Nadu, Maharashtra, and Goa, who are heavily reliant on international tourists, witnessed a decline in rankings due to the slower recovery in international demand. Gujarat, however, saw a substantial increase in international footfall, rising from the 12th to the 1st position in the international ranking, contributing to its overall top ranking.

Conversely, Bihar dropped 7 positions to rank 15, despite increased efforts in marketing and state expenditure. The effectiveness of these campaigns is questionable, as evidenced by the failure to attract a higher number of tourists, especially as international tourist visits have reduced drastically.

In the competition for the top spot in tourist footfall since 2017, Uttar Pradesh and Tamil Nadu have been contenders. However, Gujarat outpaced both this year.

Uttar Pradesh secured the top spot in domestic tourism footprint, attributed to its strong cultural and spiritual tourism hotspots such as Agra, Lucknow, Varanasi, and Ayodhya. Accounting for 18% of all domestic travel, Uttar Pradesh increased its footfall by 12% compared to 2019. Infrastructure development, including road and rail projects like National Expressway 1 connecting Delhi to Varanasi, and increased rail budget for state connectivity, contributed to this growth. Additionally, five new airports became operational between 2018-2022 under the UDAN scheme.

With increased tourism expenditure, Gujarat captured 8% of all tourist demand, excelling in international tourism by capturing 20% of the international demand. Infrastructure development, including six airports and India's first two water domes since 2018, along with the inauguration of India's first Smart City GIFT, attracted multinational corporations. Gujarat's prominent tourism campaign further elevated its ranking. Gujarat also benefitted from the travel of its widespread NRI diaspora.

These rankings affirm that investment in tourism infrastructure and effective marketing significantly influences the tourism demand generated by each state.

FIGURE 7: METHODOLOGY FOR TOURIST VISITS

Range	Points
1 to 5	15
6 to 10	12
11 to 15	8
16 to 20	5
21 to 25	2

FIGURE 8: DOMESTIC AND INTERNATIONAL TOURIST VISITS

State	Tourist Footfall 2022/23 (in lakhs)			
	Domestic	Ranking	State	Int. Ranking
Uttar Pradesh	3,179.14	1	Gujarat	17.77
Tamil Nadu	2,185.85	2	Maharashtra	15.12
Andhra Pradesh	1,927.67	3	West Bengal	10.37
Karnataka	1,824.13	4	Delhi	8.16
Gujarat	1,358.11	5	Uttar Pradesh	6.49
Maharashtra	1,112.98	6	Tamil Nadu	4.07
Rajasthan	1,083.28	7	Rajasthan	3.97
West Bengal	845.42	8	Kerala	3.46
Telangana	607.48	9	Punjab	3.30
Uttarakhand	546.43	10	Madhya Pradesh	2.05
Jharkhand	382.84	11	Jharkhand	1.92
Madhya Pradesh	358.49	12	Goa	1.75
Delhi	271.86	13	Andhra Pradesh	1.66
Punjab	260.89	14	Karnataka	1.29
Bihar	253.30	15	Bihar	0.87
Chhattisgarh	236.36	16	Sikkim	0.69
Kerala	188.67	17	Telangana	0.68
Jammu & Kashmir	184.99	18	Uttarakhand	0.62
Himachal Pradesh	150.71	19	Himachal Pradesh	0.29
Assam	83.82	20	Odisha	0.22
Odisha	78.68	21	Jammu & Kashmir	0.20
Goa	70.12	22	Assam	0.09
Haryana	21.09	23	Tripura	0.09
Sikkim	16.26	24	Meghalaya	0.08
Meghalaya	9.37	25	Manipur	0.04
Tripura	2.36	26	Nagaland	0.03
Arunachal Pradesh	2.22	27	Mizoram	0.03
Mizoram	2.18	28	Haryana	0.02
Manipur	1.40	29	Arunachal Pradesh	0.01
Nagaland	0.97	30	Chhattisgarh	0.00

Source: Ministry of Tourism, Government of India

FIGURE 9: POINT ALLOCATION FOR TOURIST VISITS

State	Points Obtained			Rank				Variance		
	Dom.	Int.	Total	2024	2019	2013	2009	(19-24)	(13-24)	(09-24)
Gujarat	15	15	30	1	8	9	8	7	8	7
Uttar Pradesh	15	15	30	1	1	1	1	-	-	-
Maharashtra	12	15	27	3	1	1	4	-2	-2	1
Tamil Nadu	15	12	27	3	1	1	1	-2	-2	-2
West Bengal	12	15	27	3	5	5	7	2	2	4
Rajasthan	12	12	24	6	4	4	1	-2	-2	-5
Andhra Pradesh	15	8	23	7	8	5	4	1	-2	-3
Delhi	8	15	23	7	6	5	8	-1	-2	1
Karnataka	15	8	23	7	6	5	4	-1	-2	-3
Madhya Pradesh	8	12	20	10	8	9	8	-2	-1	-2
Punjab	8	12	20	10	8	13	22	-2	3	12
Kerala	5	12	17	12	14	13	8	2	1	-4
Telangana	12	5	17	12	8	-	-	-4	-	-
Uttarakhand	12	5	17	12	16	13	8	4	1	-4
Bihar	8	8	16	15	8	9	13	-7	-6	-2
Jharkhand	8	8	16	15	16	20	20	1	5	5
Goa	2	8	10	17	15	16	13	-2	-1	-4
Himachal Pradesh	5	5	10	17	16	9	13	-1	-8	-4
Assam	5	2	7	19	22	20	18	3	1	-1
Jammu & Kashmir	5	2	7	19	19	16	16	-	-3	-3
Odisha	2	5	7	19	19	18	18	-	-1	-1
Sikkim	2	5	7	19	22	20	20	3	1	1
Chhattisgarh	5	0	5	23	21	25	25	-2	2	2
Meghalaya	2	2	4	24	22	23	22	-2	-1	-2
Haryana	2	0	2	25	22	18	16	-3	-7	-9
Manipur	0	2	2	25	27	27	27	2	2	2
Tripura	0	2	2	25	26	23	22	1	-2	-3
Arunachal Pradesh	0	0	0	28	27	25	25	-1	-3	-3
Mizoram	0	0	0	28	27	27	27	-1	-1	-1
Nagaland	0	0	0	28	27	27	27	-1	-1	-1

# PRESENCE OF BRANDED HOTEL ROOMS

Since 2018/19, the branded hotel supply in the country has increased by 20% or nearly 28,000 rooms. **Gujarat, Maharashtra, and Rajasthan emerge as the most popular destinations for hotel supply adding 5,200, 3,100, and 2,700 rooms, respectively.** Goa and Uttarakhand follow closely, adding nearly 2,000 rooms each.

Before a hotel is constructed in a destination, the location is subjected to extensive scrutiny and the economic landscape and potential of long-term demand growth is analysed. Therefore, the existence of branded hotel supply in a state is a strong indicator of tourism potential and attractiveness for hospitality investments.

In terms of the sheer number of branded hotel rooms, Maharashtra, Karnataka, Delhi, Tamil Nadu, and Gujarat rank among the top 5. However, when we look at the density of hotel supply in each state, Delhi ranks the highest with nearly 1,500 rooms per 100km<sup>2</sup>. Delhi is followed by Goa, Haryana, Kerala, and Tamil Nadu. Although Maharashtra has one of the highest numbers of existing and proposed branded hotel rooms in the country, almost 80% are

concentrated in the urban areas of Mumbai and Pune. This, in addition to the size of the state, results in its overall ranking in 6<sup>th</sup> place.

When considering the lowest additions to inventory, Meghalaya, Mizoram, Nagaland, Manipur, and Odisha remain close to the bottom of the list. Although these states offer a wide array of tourist attractions, lack of development in other areas such as transport and connectivity hinder the interest of branded hotel supply in the region.

FIGURE 10: 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

FIGURE 11: POINT ALLOCATION FOR PRESENCE OF BRANDED HOTEL ROOMS

State	State Area (km <sup>2</sup> )	Branded Hotel Rooms per 100 km <sup>2</sup>		Points Obtained	Rank				Variance		
		Existing	Proposed		2024	2019	2013	2009	(19-24)	(13-24)	(09-24)
Delhi	1,483	1,057.1	163.3	13	1	1	1	1	-	-	-
Goa	3,702	237.8	96.2	13	1	2	2	2	1	1	1
Haryana	44,212	16.9	7.6	13	1	3	3	4	2	2	3
Kerala	38,863	13.4	7.1	12	4	5	4	3	1	-	-1
Tamil Nadu	1,30,058	9.9	5.9	11	5	9	8	6	4	3	1
Karnataka	1,92,000	9.4	5.5	10	6	6	7	5	-	1	-1
Maharashtra	3,07,713	8.7	5.1	10	6	7	6	7	1	-	1
Punjab	50,362	8.3	5.0	9	8	12	12	16	4	4	8
Uttarakhand	53,483	6.8	4.1	8	9	4	5	8	-5	-4	-1
West Bengal	88,752	6.7	3.7	7	10	1	1	11	1	1	1
Gujarat	1,96,063	6.6	3.5	7	10	18	10	14	-2	-	4
Telangana	1,14,840	6.5	3.4	7	10	10	9		-	-1	-10
Sikkim	7,096	4.8	3.1	6	13	16	17	9	3	4	-4
Himachal Pradesh	55,673	4.2	3.0	6	13	15	15	12	2	2	-1
Rajasthan	3,42,239	3.5	2.3	5	15	13	13	13	-2	-2	-2
Uttar Pradesh	2,40,928	3.1	2.3	5	15	14	14	17	-1	-1	2
Andhra Pradesh	1,60,205	2.0	1.6	2	17	17	10	15	-	-7	-2
Madhya Pradesh	3,08,000	1.0	1.2	2	17	21	21	18	4	4	1
Jammu & Kashmir	2,22,236	1.0	1.0	2	17	20	19	21	3	2	4
Tripura	10,491	0.9	0.9	2	17	18	16	10	1	-1	-7
Assam	78,438	0.8	0.9	0	21	26	24	22	5	3	1
Manipur	22,327	0.8	0.8	0	21	19	22	25	-2	1	4
Odisha	1,55,707	0.7	0.7	0	21	25	23	20	4	2	-1
Bihar	94,163	0.5	0.7	0	21	23	25	24	2	4	3
Jharkhand	79,714	0.5	0.4	0	21	22	18	19	1	-3	-2
Chhattisgarh	1,37,898	0.5	0.2	0	21	26	25	25	5	4	4
Meghalaya	22,429	0.4	0.2	0	21	26	25	25	5	4	4
Nagaland	16,579	0.1	0.0	0	21	26	25	25	5	4	4
Arunachal Pradesh	83,743	0.0	0.0	0	21	26	25	23	5	4	2
Mizoram	21,087	0.0	0.0	0	21	24	20	25	3	-1	4

Source: Hotelivate Research

# GSDP PER CAPITA

Gross State Domestic Product is one of the most important indicators of the economic health of a state. GSDP is a measure of the volume of goods and services produced within a state annually. In turbulent economic conditions, Travel & Tourism is one of the first and most intensely afflicted industries. Thus, GSDP remains one of the fundamental parameters.

The top five states under this parameter remain the same as 2019. However, this year, **Sikkim has surpassed Delhi and Goa in terms of GSDP per capita. While Delhi remains in 2<sup>nd</sup> place Goa has dropped to 3<sup>rd</sup> after occupying the top spot in 2019. Haryana and Karnataka continue to maintain their strong positions in the top 5.**

FIGURE 12: METHODOLOGY FOR GSDP PER CAPITA

Range	Points
Above 4,00,000	10.0
3,00,000 to 3,99,999	7.5
2,00,000 to 2,99,999	5.0
1,00,000 to 1,99,999	2.5
Below 1,00,000	0.0

FIGURE 13: POINTS ALLOCATION FOR GSDP PER CAPITA

State	GSDP ₹lakhs (2022/23)	Population (2011)	GDP per Capita (₹)	Points Obtained	Rank 2024	Rank 2019	Rank 2013	Rank 2009	Variance (19-24)	Variance (13-24)	Variance (09-24)
Sikkim	42,75,617	6,10,577	7,00,258	10.0	1	3	3	9	2	2	8
Delhi	10,43,75,934	1,67,87,941	6,21,732	10.0	2	2	2	1	-	-	-1
Goa	82,60,370	14,58,545	5,66,343	10.0	3	1	1	2	-2	-2	-1
Haryana	9,94,15,408	2,53,51,462	3,92,149	7.5	4	4	4	4	-	-	-
Karnataka	22,41,36,839	6,10,95,297	3,66,864	7.5	5	5	14	5	-	9	-
Telangana	11,48,11,470	3,50,03,674	3,27,998	7.5	6	6	0	0	-	-	-6
Tamil Nadu	23,64,51,407	7,21,47,030	3,27,735	7.5	7	8	11	6	1	4	-1
Gujarat	19,37,06,646	6,04,39,692	3,20,496	7.5	8	10	6	14	2	-2	6
Himachal Pradesh	1,95,40,459	68,64,602	2,84,655	5.0	9	9	10	12	-	1	3
Kerala	9,32,46,996	3,34,06,061	2,79,132	5.0	10	12	7	3	2	-3	-7
Maharashtra	31,08,02,187	11,23,74,333	2,76,578	5.0	11	11	5	7	-	-6	-4
Andhra Pradesh	13,17,72,815	4,95,77,103	2,65,794	5.0	12	13	13	15	1	1	3
Arunachal Pradesh	35,12,354	13,83,727	2,53,833	5.0	13	16	12	23	3	-1	10
Mizoram	27,82,350	10,97,206	2,53,585	5.0	14	15	15	25	1	1	11
Uttarakhand	2,53,83,197	1,00,86,292	2,51,660	5.0	15	7	9	8	-8	-6	-7
Punjab	6,73,10,705	2,77,43,338	2,42,619	5.0	16	14	8	16	-2	-8	-
Rajasthan	14,13,62,006	6,85,48,437	2,06,222	5.0	17	17	17	13	-	-	-4
West Bengal	17,13,00,000	9,12,76,115	1,87,672	2.5	18	18	18	11	-	-	-7
Odisha	7,74,86,924	4,19,74,218	1,84,606	2.5	19	22	23	20	3	4	1
Madhya Pradesh	13,22,82,084	7,26,26,809	1,82,139	2.5	20	23	25	18	3	5	-2
Jammu & Kashmir	2,27,92,730	1,25,41,302	1,81,741	2.5	21	24	22	21	3	1	-
Chhattisgarh	4,57,60,826	2,55,45,198	1,79,137	2.5	22	21	19	25	-1	-3	3
Tripura	64,77,808	36,73,917	1,76,319	2.5	23	19	21	10	-4	-2	-13
Nagaland	31,91,254	19,78,502	1,61,296	2.5	24	20	16	25	-4	-8	1
Assam	4,93,16,660	3,12,05,576	1,58,038	2.5	25	27	26	22	2	1	-3
Meghalaya	42,69,708	29,66,889	1,43,912	2.5	26	25	20	25	-1	-6	-1
Manipur	36,59,447	28,55,794	1,28,141	2.5	27	28	27	25	1	-	-2
Jharkhand	3,93,72,204	3,29,88,134	1,19,353	2.5	28	26	24	19	-2	-4	-9
Uttar Pradesh	18,63,22,112	19,98,12,341	93,249	0.0	29	29	28	17	-	-1	-12
Bihar	7,51,39,559	10,40,99,452	72,181	0.0	30	30	29	24	-	-1	-6

Source: RBI - State Finances: A study of Budgets 2022-23

# EFFECTIVENESS OF **MARKETING CAMPAIGN**

This parameter comprises two key elements. Firstly, it involves an analysis of the social media outreach of each state, which was tracked through the followers of the official state tourism accounts on Facebook, X (formerly Twitter), YouTube, and Instagram. Secondly, it includes the evaluation of the rating of the state tourism website on a global scale.

The inclusion of the social media presence metric in 2019 was driven by the significant and increasing youth population and travellers in India. Notably, India boasts the largest population under 35 globally. As internet accessibility and social media usage continue to improve, a substantial portion of this demographic has become enthusiastic internet users. India stands out as the largest user base for major platforms such as Facebook, YouTube, and Instagram. Official and governmental authorities are increasingly adopting these channels for efficient and widespread communication.

Tracking website traffic for the official tourism website for each state provides additional insight into the tourism interest generated by it. **Gujarat, Karnataka, and Kerala achieved a perfect score in both social media outreach and state tourism website ratings, establishing them as highly popular destinations for**

**online users.** When judging the improvement in performance in the parameter of Marketing, Karnataka has been improving over the last 15 years. Since 2009, Karnataka has gone up 10 places in terms of website traffic. Additionally, since 2017, when the social media metric was introduced, Karnataka has increased its following across platforms, improving by 16 places.

Additionally, we have compared the Incredible India website to other comparable countries' official tourism site. The websites were ranked according to their monthly average traffic. India ranked 4<sup>th</sup> out of the 9 analysed countries. This ranking indicates that although India is well recognised in the region, there is still potential for improvement in the marketing of the country as a tourism destination.

FIGURE 14: METHODOLOGY FOR WEBSITE TRAFFIC

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 15: POINT ALLOCATION FOR OFFICIAL WEBSITE

State	Average Monthly Website Traffic	Points Obtained	2024	Rank				Variance		
				2019	2013	2009	(19-24)	(13-24)	(09-24)	
Kerala	8,04,100	5	1	2	3	2	1	1	2	
Karnataka	4,16,500	5	2	17	12	11	15	9	10	
Uttarakhand	3,15,300	5	3	5	11	17	2	14	8	
Rajasthan	2,94,000	5	4	1	2	5	-3	1	-2	
Gujarat	2,23,300	5	5	4	8	7	-1	2	3	
Delhi	2,05,600	4	6	8	5	3	2	-3	-1	
Tamil Nadu	1,36,200	4	7	11	21	12	4	5	14	
Telangana	1,35,600	4	8	9	-	12	1	4	-8	
Madhya Pradesh	97,600	4	9	6	13	6	-3	-3	4	
Odisha	76,300	4	10	13	9	15	3	5	-1	
Goa	71,600	3	11	10	18	9	-1	-2	7	
Sikkim	66,800	3	12	14	19	19	2	7	7	
Himachal Pradesh	62,000	3	13	12	10	8	-1	-5	-3	
Andhra Pradesh	53,700	3	14	23	14	10	9	-4	-	
Meghalaya	50,100	3	15	18	17	21	3	6	2	
Bihar	42,900	2	16	24	1	1	8	-15	-15	
Uttar Pradesh	42,200	2	17	25	16	14	8	-3	-1	
Haryana	41,300	2	18	15	15	18	-3	-	-3	
Maharashtra	32,000	2	19	7	6	4	-12	-15	-13	
Jharkhand	26,700	2	20	20	25	22	-	2	5	
Manipur	17,400	1	21	28	20	28	7	7	-1	
Chhatisgarh	16,700	1	22	26	28	25	4	3	6	
Punjab	16,400	1	23	19	27	27	-4	4	4	
Arunachal Pradesh	15,400	1	24	22	22	24	-2	-	-2	
Tripura	14,100	1	25	27	24	26	2	1	-1	
West Bengal	11,200	0	26	16	4	13	-10	-13	-22	
Nagaland	5,100	0	27	30	29	29	3	2	2	
Assam	4,100	0	28	29	7	23	1	-5	-21	
Jammu & Kashmir	2,300	0	29	21	23	20	-8	-9	-6	
Mizoram	1,900	0	30	3	26	16	-27	-14	-4	

Source: Hotelivate Research

FIGURE 16: POINTS ALLOCATION FOR SOCIAL MEDIA OUTREACH

State	Social Media Followers					Points Obtained	Rank			Variance	
	Facebook	X	YouTube	Instagram	Total		2024	2019	2017	(19-24)	(17-24)
Kerala	40,80,000	10,90,000	3,81,000	6,58,000	62,09,000	5	1	1	1	-	-
Madhya Pradesh	20,10,000	9,03,900	88,100	4,50,000	34,52,000	5	2	7	7	5	5
Karnataka	10,80,000	1,31,900	4,010	20,60,000	32,75,910	5	3	16	19	13	16
Gujarat	10,50,000	10,70,000	84,300	4,24,000	26,28,300	5	4	2	2	-2	-2
Maharashtra	9,70,000	3,34,300	1,38,000	4,57,000	18,99,300	5	5	11	9	6	4
Goa	9,10,000	6,47,500	4,640	2,32,000	17,94,140	4	6	3	4	-3	-2
Uttarakhand	10,20,000	97,800	20,200	3,99,000	15,37,000	4	7	10	20	3	13
Odisha	2,74,000	10,20,000	80,300	1,56,000	15,30,300	4	8	6	5	-2	-3
Uttar Pradesh	6,27,000	5,22,400	3,550	2,86,000	14,38,950	4	9	9	8	-	-1
Rajasthan	6,63,000	2,02,200	11,600	5,28,000	14,04,800	4	10	4	6	-6	-4
West Bengal	10,10,000	3,30,000	23,000	16,200	13,79,200	3	11	5	3	-6	-8
Jammu & Kashmir	4,85,000	1,09,500	21,100	1,85,000	8,00,600	3	12	12	13	-	1
Andhra Pradesh	5,34,000	30,900	7,020	19,400	5,91,320	3	13	8	10	-5	-3
Bihar	1,66,000	1,12,200	40,100	2,02,000	5,20,300	3	14	19	25	5	11
Chhatisgarh	1,88,000	1,71,100	7,460	77,000	4,43,560	3	15	13	11	-2	-4
Tamil Nadu	1,80,000	78,200	12,300	1,25,000	3,95,500	2	16	26	15	10	-1
Himachal Pradesh	97,000	42,600	2,090	1,52,000	2,93,690	2	17	29	23	12	6
Telangana	72,000	15,200	13,600	52,200	1,53,000	2	18	14	12	-4	-6
Mizoram	69,000	17,800	2,800	40,000	1,29,600	2	19	30	28	11	9
Delhi	57,000	22,700	1,760	40,200	1,21,660	1	20	23	14	3	-6
Meghalaya	64,000	8,907	4,330	40,700	1,17,937	1	21	15	16	-6	-5
Tripura	44,000	18,800	597	44,700	1,08,097	1	22	21	21	-1	-1
Arunachal Pradesh	70,000	24,100	1,950	6,899	1,02,949	1	23	17	18	-6	-5
Jharkhand	18,000	46,600	2,010	34,700	1,01,310	1	24	20	22	-4	-2
Sikkim	7,200	26,500	-	36,700	70,400	1	25	22	26	-3	1
Nagaland	21,000	15,300	-	31,500	67,800	1	26	28	29	2	3
Punjab	24,000	12,100	4,110	17,800	58,010	1	27	27	30	-	3
Haryana	35,000	14,500	839	6,174	56,513	1	28	24	27	-4	-1
Assam	16,000	6,864	19,000	12,600	54,464	1	29	25	24	-4	-5
Manipur	26,000	16,000	2,570	9,538	54,108	1	30	18	17	-12	-13

FIGURE 17: METHODOLOGY FOR SOCIAL MEDIA OUTREACH

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 19 COUNTRY TOURISM WEBSITE RANKINGS

Country	Tourism Campaign	Official Website	Website Traffic	Rank 2024
Thailand	Amazing Thailand	tourismthailand.org	12,00,000	1
Indonesia	Wonderful Indonesia	indonesia.travel	9,16,900	2
Singapore	Passion made Possible	visitsingapore.com	6,58,100	3
India	Incredible India	incredibleindia.org	3,18,500	4
Vietnam	Live Fully in Vietnam	vietnam.travel	2,83,400	5
Sri Lanka	So Sri Lanka	srilanka.travel	93,200	6
Malayasia	Truly Asia Malaysia	www.malaysia.travel	61,300	7
Cambodia	Kingdom of Wonder	tourismcambodia.org	12,700	8
Bangladesh	Beautiful Bangladesh	beautifulbangladesh.gov.bd	742	9

FIGURE 18 POINT ALLOCATION FOR EFFECTIVENESS OF MARKETING CAMPAIGN

State	Total	Rank 2024
Gujarat	10	1
Karnataka	10	1
Kerala	10	1
Madhya Pradesh	9	4
Rajasthan	9	4
Uttarakhand	9	4
Odisha	8	7
Goa	7	8
Maharashtra	7	8
Andhra Pradesh	6	10
Tamil Nadu	6	10
Telangana	6	10
Uttar Pradesh	6	10
Bihar	5	14
Delhi	5	14
Himachal Pradesh	5	14
Chhatisgarh	4	17
Meghalaya	4	17
Sikkim	4	17
Haryana	3	20
Jammu & Kashmir	3	20
Jharkhand	3	20
West Bengal	3	20
Arunachal Pradesh	2	24
Manipur	2	24
Mizoram	2	24
Punjab	2	24
Tripura	2	24
Assam	0	29
Nagaland	0	29



# URBANISATION

Urbanisation plays a pivotal role in fostering economic development. From the period of Liberalisation in 1991 to the last census in 2011, India experienced a modest growth in its urban population, registering a meagre 5.3% increase. The pace of urban expansion in India has been sluggish, with minimal annual urbanisation. **Delhi, owing to its compact geographical area and dense population, maintains its position at the forefront of this parameter, boasting an urbanisation rate of 97%.** As the population and urbanisation rates are derived from the 2011 census, there have been minimal changes in the states' rankings since the previous edition.

However, the current development trends indicate that due to rapid expansion and development in several states, the urbanisation rate is likely to be higher in most regions.

FIGURE 20: METHODOLOGY FOR URBANISATION

Rank	Points
Above 80%	10
65% to 79.9%	8
50% to 64.9%	6
35% to 49.9%	4
20% to 34.9%	2
Below 20%	0

FIGURE 21: POINT ALLOCATION FOR URBANISATION

State	Population (2011)				Points Obtained	Rank 2024
	Total	Rural	Urban	Urban %		
Delhi	1,67,87,941	4,19,319	1,63,33,916	97%	10	1
Goa	14,58,545	5,51,414	9,06,309	62%	6	2
Mizoram	10,97,206	5,29,037	5,61,977	51%	6	3
Tamil Nadu	7,21,47,030	3,71,89,229	3,49,49,729	48%	4	4
Kerala	3,34,06,061	1,74,55,506	1,59,32,171	48%	4	5
Maharashtra	11,23,74,333	6,15,45,441	5,08,27,531	45%	4	6
Gujarat	6,04,39,692	3,46,70,817	2,57,12,811	43%	4	7
Telangana	3,50,03,674	2,15,85,000	1,36,09,000	39%	4	8
Karnataka	6,10,95,297	3,75,52,529	2,35,78,175	39%	4	9
Punjab	2,77,43,338	1,73,16,800	1,03,87,436	37%	4	10
Haryana	2,53,51,462	1,65,31,493	88,21,588	35%	2	11
West Bengal	9,12,76,115	6,22,13,676	2,91,34,060	32%	2	12
Uttarakhand	1,00,86,292	70,25,583	30,91,169	31%	2	13
Andhra Pradesh	4,95,77,103	3,47,76,389	1,46,10,410	29%	2	14
Nagaland	19,78,502	14,06,861	5,73,741	29%	2	15
Manipur	28,55,794	18,99,624	8,22,132	29%	2	16
Madhya Pradesh	7,26,26,809	5,25,37,899	2,00,59,666	28%	2	17
Jammu & Kashmir	1,25,41,302	91,34,820	34,14,106	27%	2	18
Tripura	36,73,917	27,10,051	9,60,981	26%	2	19
Rajasthan	6,85,48,437	5,15,40,236	1,70,80,776	25%	2	20
Sikkim	6,10,577	4,55,962	1,51,726	25%	2	21
Jharkhand	3,29,88,134	2,50,36,946	79,29,292	24%	2	22
Chhatisgarh	2,55,45,198	1,96,03,658	59,36,538	23%	2	23
Arunachal Pradesh	13,83,727	10,69,165	3,13,446	23%	2	24
Uttar Pradesh	19,98,12,341	15,51,11,022	4,44,70,455	22%	2	25
Meghalaya	29,66,889	23,68,971	5,95,036	20%	2	26
Odisha	4,19,74,218	3,49,51,234	69,96,124	17%	0	27
Assam	3,12,05,576	2,67,80,516	43,88,756	14%	0	28
Bihar	10,40,99,452	9,20,75,028	1,17,29,609	11%	0	29
Himachal Pradesh	68,64,602	61,67,805	6,88,704	10%	0	30

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

# ROAD AND RAIL VISITS

The Travel & Tourism industry heavily depends on the transportation infrastructure of a destination. During the pandemic in India, travel was primarily facilitated by road networks, as air travel was restricted. The growing prominence of domestic clientele in the country underscores the need for a well-developed road and railway network.

The central government has emphasised the enhancement of the country's road and railway systems. The recently launched National Expressway project aims to improve connectivity between major cities. Currently, there are four operational National Expressways, with nine more expected to be operational in the next two years. From 2014 to 2024, India's road network expanded by 59%, making it the country with the second-largest road network globally, following the United States.

FIGURE 22: METHODOLOGY FOR ROAD NETWORK

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

India boasts the world's fourth-largest railway network, with over 13,200 passenger trains operating across the extensive network. The Railway Ministry has implemented various railway projects across states to enhance connectivity, with the introduction of Vande Bharat Express trains in 2019 being a notable development set to expand in the coming years. The government has also launched the National Rail Plan 2030 to facilitate the growth of the railway network ahead of supply.

To compare states on transportation parameters, we consider surface road length and total railway track per 100 km<sup>2</sup> within each state. Delhi maintains its position as the best-connected state, followed by Kerala and West Bengal. States like Meghalaya, Haryana, and Karnataka have shown significant improvement in their transport infrastructure, while Bihar and Andhra Pradesh have been unable to keep pace with the development of other states and thus have slipped in the rankings.

FIGURE 23: METHODOLOGY FOR 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 24: ROAD INFRASTRUCTURE

State	State Area (km <sup>2</sup> )	Road Length	Road Length per 100 km <sup>2</sup> of Area (km)	Points Obtained	Rank 2024
Delhi	1,483	16,170	1,090.36	5	1
Kerala	38,863	2,59,932	668.84	5	2
Assam	78,438	3,99,122	508.84	5	3
Goa	3,702	18,697	505.05	5	4
Tripura	10,491	45,120	430.08	5	5
West Bengal	88,752	2,83,865	319.84	4	6
Bihar	94,163	2,98,205	316.69	4	7
Punjab	50,362	1,47,862	293.60	4	8
Nagaland	16,579	37,871	228.43	4	9
Tamil Nadu	1,30,058	2,71,137	208.47	4	10
Maharashtra	3,07,713	6,36,887	206.97	3	11
Odisha	1,55,707	3,05,631	196.29	3	12
Karnataka	1,92,000	3,58,300	186.61	3	13
Uttar Pradesh	2,40,928	4,42,907	183.83	3	14
Meghalaya	22,429	40,258	179.49	3	15
Sikkim	7,096	12,182	171.67	2	16
Manipur	22,327	32,389	145.07	2	17
Himachal Pradesh	55,673	73,230	131.54	2	18
Uttarakhand	53,483	68,727	128.50	2	19
Gujarat	1,96,063	2,49,373	127.19	2	20
Telangana	1,14,840	1,40,555	122.39	1	21
Madhya Pradesh	3,08,000	3,65,045	118.52	1	22
Haryana	44,212	50,292	113.75	1	23
Andhra Pradesh	1,60,205	1,76,351	110.08	1	24
Jharkhand	79,714	81,245	101.92	1	25
Rajasthan	3,42,239	3,13,469	91.59	0	26
Mizoram	21,087	16,250	77.06	0	27
Chhattisgarh	1,37,898	1,05,074	76.20	0	28
Arunachal Pradesh	83,743	55,262	65.99	0	29
Jammu & Kashmir	2,22,236	1,20,034	54.01	0	30

Source: RBI Handbook of Statistics on Indian States 2022-23

FIGURE 25: RAIL INFRASTRUCTURE

State	Road Length per 100 km <sup>2</sup> of Area (km)	Points Obtained	Rank 2024
Delhi	47.61	5	1
West Bengal	11.44	5	2
Jharkhand	7.69	5	3
Haryana	7.33	5	4
Punjab	7.29	5	5
Bihar	7.26	4	6
Uttar Pradesh	6.67	4	7
Kerala	5.42	4	8
Tamil Nadu	5.37	4	9
Andhra Pradesh	5.02	4	10
Assam	4.96	3	11
Gujarat	4.00	3	12
Maharashtra	3.91	3	13
Odisha	3.75	3	14
Karnataka	3.45	3	15
Goa	3.35	2	16
Madhya Pradesh	3.28	2	17
Tripura	3.21	2	18
Telangana	2.93	2	19
Rajasthan	2.80	2	20
Chhattisgarh	2.20	1	21
Uttarakhand	0.97	1	22
Himachal Pradesh	0.68	1	23
Nagaland	0.25	1	24
Jammu & Kashmir	0.22	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: RBI Handbook of Statistics on Indian States 2022-23

FIGURE 26: POINT ALLOCATION FOR ROAD AND RAIL INFRASTRUCTURE

State	Road	Railway	Total	Rank			Variance	
				2024	2019	2011	(19-24)	(11-24)
Delhi	5	5	10	1	1	1	-	-
Kerala	5	4	9	2	2	2	-	-
Punjab	4	5	9	2	2	2	-	-
West Bengal	4	5	9	2	2	6	-	4
Assam	5	3	8	5	6	12	1	7
Bihar	4	4	8	5	2	6	-3	1
Tamil Nadu	4	4	8	5	6	2	1	-3
Goa	5	2	7	8	8	6	-	-2
Tripura	5	2	7	8	8	11	-	3
Uttar Pradesh	3	4	7	8	8	2	-	-6
Haryana	1	5	6	11	17	6	6	-5
Jharkhand	1	5	6	11	11	19	-	8
Karnataka	3	3	6	11	15	12	4	1
Maharashtra	3	3	6	11	11	12	-	1
Odisha	3	3	6	11	11	23	-	12
Andhra Pradesh	1	4	5	16	11	12	-5	-4
Gujarat	2	3	5	16	17	6	1	-10
Nagaland	4	1	5	16	15	17	-1	1
Himachal Pradesh	2	1	3	19	21	19	2	-
Madhya Pradesh	1	2	3	19	17	19	-2	-
Meghalaya	3	0	3	19	27	25	8	6
Telangana	1	2	3	19	17		-2	-19
Uttarakhand	2	1	3	19	21	19	2	-
Manipur	2	0	2	24	24	25	-	1
Rajasthan	0	2	2	24	24	16	-	-8
Sikkim	2	0	2	24	21	25	-3	1
Chhattisgarh	0	1	1	27	24	17	-3	-10
Jammu & Kashmir	0	1	1	27	27	25	-	-2
Arunachal Pradesh	0	0	0	29	29	29	-	-
Mizoram	0	0	0	29	29	23	-	-6

# AIRCRAFT MOVEMENT

Historically, India's aviation sector experienced significant growth exclusively in major metropolitan areas, leading to a widening gap with the rest of the country, negatively impacting connectivity and overall economic development. In response to this disparity, the government launched the Ude Desh ka Aam Nagrik (UDAN) scheme in 2016. The primary goal of this regional connectivity scheme was to enhance air connectivity from Tier 2 and Tier 3 cities, thereby increasing affordability and accessibility for underserved and unserved destinations nationwide.

Since its inception, UDAN has successfully established 75 new airports, with plans to reach 100 by 2024. The scheme has also operationalised 387 flight routes covering 54 airports, 6 heliports, and 2 water domes. This concerted effort has contributed to the growth of the aviation fleet in India from 400 aircraft in 2014 to 723 in 2023.

Despite the record numbers in aircraft movements and passenger traffic in 2019, the industry faced challenges due to the pandemic. While efforts to ease restrictions and invest in infrastructure have been made, aircraft movements have yet to fully recover to pre-pandemic levels. However, a rebound is anticipated with the resumption of international travel in the coming years.

The Airports Authority of India reported that a total of 32.7 crore passengers were served in 2022/23 compared to 34.5 crore

passengers in 2018/19, reflecting a decline of 5%. To evaluate the states in terms of aviation infrastructure, total aircraft movements were analysed as it takes into consideration factors such as Aviation Turbine Fuel (ATF) charges, taxes on ATF charges, cost of capital, airport parking charges, and labour laws.

Delhi, Maharashtra, Karnataka, and Tamil Nadu consistently ranked in the top 5 states since the 2011 survey, with Telangana surpassing West Bengal to claim the 5<sup>th</sup> spot. Collectively, these top 5 states accounted for nearly 60% of all aircraft movements, with Delhi and Maharashtra contributing almost 35%. While the bottom of the list featured Northeastern States with single-digit aircraft movements in 2022/23, the positive trend is that for the first time, no states reported zero aircraft movements. The operationalisation of airports across all states under the UDAN scheme presents an optimistic outlook for India's growth trajectory, particularly in the Travel & Tourism sector.

FIGURE 27: METHODOLOGY FOR AIRCRAFT MOVEMENT

Range	Points
Above 2,00,000	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

FIGURE 28: POINT ALLOCATION FOR AIRCRAFT MOVEMENT

State	Aircraft Movement (2022/23)*	Points Obtained	2024	Rank			Variance		
				2019	2013	2009	(19-24)	(13-24)	(09-24)
Delhi	4,30,095	10	1	1	2	2	-	1	1
Karnataka	2,61,898	10	3	3	4	4	-	1	1
Maharashtra	4,05,457	10	2	2	1	1	-	-1	-1
Tamil Nadu	1,83,005	8	4	4	3	3	-	-1	-1
Telangana	1,59,975	8	5	6	0		1	-5	-5
West Bengal	1,58,632	8	6	5	6	6	-1	-	-
Gujarat	1,17,585	6	8	8	8	8	-	-	-
Kerala	1,18,038	6	7	7	7	7	-	-	-
Andhra Pradesh	59,793	4	13	11	5	5	-2	-8	-8
Assam	61,283	4	12	12	9	9	-	-3	-3
Goa	61,745	4	11	13	11	11	2	-	-
Rajasthan	62,911	4	10	10	12	10	-	2	-
Uttar Pradesh	82,615	4	9	9	13	13	-	4	4
Arunachal Pradesh	2,221	2	28	29	22	22	1	-6	-6
Bihar	34,334	2	17	16	16	19	-1	-1	2
Chhattisgarh	23,453	2	18	19	17	18	1	-1	-
Haryana	32	2	30	29	22	22	-1	-8	-8
Himachal Pradesh	6,674	2	24	24	22	22	-	-2	-2
Jammu & Kashmir	43,947	2	15	15	10	12	-	-5	-3
Jharkhand	20,801	2	19	20	21	21	1	2	2
Madhya Pradesh	48,789	2	14	14	14	14	-	-	-
Manipur	12,098	2	23	23	20	20	-	-3	-3
Meghalaya	3,198	2	27	27	22	22	-	-5	-5
Mizoram	4,038	2	26	25	22	22	-1	-4	-4
Nagaland	5,415	2	25	26	22	22	1	-3	-3
Odisha	35,040	2	16	17	15	15	1	-1	-1
Punjab	19,661	2	20	18	18	17	-2	-2	-3
Sikkim	324	2	29	28	22	22	-1	-7	-7
Tripura	12,203	2	22	22	19	16	-	-3	-6
Uttarakhand	18,595	2	21	21	22	22	-	1	1

\*Denotes number of take-offs and landings (one flight constitutes two movements)  
Source: Airports Authority of India April 2022 to Mar 2023

# LITERACY RATE

The literacy rate serves as a key indicator reflecting the socio-economic status of a state. It influences various aspects, including the availability of skilled labour and the overall state development. In the context of travel & tourism, the literacy rate indirectly impacts sector development. Despite its significance, for the purpose of this report, we have assigned it a value of 5. Figures 29 and 30 illustrate our ranking methodology and the states' performance in this parameter.

The literacy rates have been drawn from the last Census carried out in India (2011), which is a decadal exercise but has been delayed due to the pandemic. Therefore, the state rankings remain unchanged.

FIGURE 30: POINT ALLOCATION FOR LITERACY RATE

State	Literacy Rate	Points Obtained	Rank 2024
Kerala	94.6%	5	1
Mizoram	91.3%	5	2
Goa	88.7%	5	3
Tripura	87.8%	5	4
Delhi	86.2%	5	5
Himachal Pradesh	82.8%	4	6
Maharashtra	82.3%	4	7
Sikkim	81.4%	4	8
Tamil Nadu	80.1%	4	9
Nagaland	79.6%	4	10
Uttarakhand	78.8%	3	11
Gujarat	78.0%	3	12
West Bengal	77.1%	3	13
Manipur	76.9%	3	14
Punjab	76.7%	3	15
Karnataka	75.6%	2	16
Haryana	75.5%	2	17
Meghalaya	74.4%	2	18
Odisha	72.9%	2	19
Assam	72.2%	2	20
Madhya Pradesh	70.6%	1	21
Chhattisgarh	70.3%	1	22
Jammu & Kashmir	68.7%	1	23
Uttar Pradesh	67.7%	1	24
Andhra Pradesh	67.4%	1	25
Telangana	66.5%	0	26
Jharkhand	66.4%	0	27
Rajasthan	66.1%	0	28
Arunachal Pradesh	65.4%	0	29
Bihar	61.8%	0	30

Source: Census of India 2011, Statistical Year Book 2017 Telanagana

# GREEN COVER

One significant challenge associated with state development is the ecological degradation of natural resources. In the context of travel and tourism, the industry requires extensive infrastructural developments, encompassing airports, railway lines, highways, and accommodation establishments. However, these developments often entail the use of substantial land resources, leading to deforestation and exploitation of forest areas. Achieving sustainable development requires striking a balance between necessary infrastructure and ecological preservation. Thus, the Green Cover parameter was introduced in 2019 to assess the states' efforts toward sustainable development.

This parameter encompasses Forest Cover and Tree Cover. Forest Cover, as reported by the Forest Survey of India, includes areas exceeding one hectare with a tree canopy density of 10% or more. In contrast, Tree Cover incorporates patches of trees in less than one

India has been making progress in the field of literacy and education. The country's literate population was recorded at 74% in 2011, with male literacy at 82.1% and female literacy at 65.5%. **At the state level, Kerala, Mizoram, Tripura and Goa rank the highest.**

FIGURE 29: 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

hectare of land, such as small green areas in cities and plantations. **Madhya Pradesh, Arunachal Pradesh, Chhattisgarh, Odisha, and Maharashtra lead in terms of Forest Cover.** While Maharashtra takes the lead in Tree Cover, followed by Rajasthan, Madhya Pradesh, Karnataka, and Uttar Pradesh.

The ranking methodology is based on green cover per 100 km<sup>2</sup>, therefore, states with extensive forest cover may rank lower due to their larger total geographical area.

FIGURE 31: 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	0

FIGURE 32: POINT ALLOCATION FOR GREEN COVER

State	State Area (km <sup>2</sup> )	Tree Cover per km <sup>2</sup> (2021)	Forest Cover per km <sup>2</sup> (2021)	Total Green Cover per 100 km <sup>2</sup>	Points Obtained	Rank		Variance (19-24)
						2024	2019	
Mizoram	21,087	444	17,820	86.61	20	1	1	-
Arunachal Pradesh	83,743	1,001	66,431	80.52	20	2	2	-
Meghalaya	22,429	698	17,046	79.11	20	3	3	-
Nagaland	16,579	365	12,251	76.10	20	4	5	1
Tripura	10,491	228	7,722	75.78	20	5	6	1
Manipur	22,327	169	16,598	75.10	17	6	4	-2
Goa	3,702	244	2,244	67.21	17	7	7	-
Kerala	38,863	2,820	21,253	61.94	17	8	8	-
Sikkim	7,096	39	3,341	47.63	17	9	9	-
Uttarakhand	53,483	1,001	24,305	47.32	17	10	10	-
Chhattisgarh	1,37,898	5,355	55,717	44.29	14	11	11	-
Assam	78,438	1,630	28,312	38.17	14	12	12	-
Odisha	1,55,707	5,004	52,156	36.71	14	13	13	-
Jharkhand	79,714	2,867	23,721	33.35	14	14	14	-
Himachal Pradesh	55,673	675	15,443	28.95	14	15	15	-
Madhya Pradesh	3,08,000	8,054	77,493	27.78	11	16	16	-
Karnataka	1,92,000	7,494	38,730	24.08	11	17	18	1
Tamil Nadu	1,30,058	4,424	26,419	23.71	11	18	17	-1
Delhi	1,483	147	195	23.06	11	19	21	2
West Bengal	88,752	2,349	16,832	21.61	11	20	19	-1
Andhra Pradesh	1,60,205	4,679	29,784	21.51	8	21	23	2
Telangana	1,14,840	2,848	21,214	20.95	8	22	20	-2
Maharashtra	3,07,713	12,108	50,798	20.44	8	23	22	-1
Jammu & Kashmir	2,22,236	4,465	23,659	12.66	8	24	24	-
Gujarat	1,96,063	5,489	14,926	10.41	8	25	25	-
Bihar	94,163	2,341	7,381	10.32	5	26	26	-
Uttar Pradesh	2,40,928	7,421	14,818	9.23	5	27	27	-
Rajasthan	3,42,239	8,733	16,655	7.42	5	28	28	-
Haryana	44,212	1,425	1,603	6.85	5	29	30	1
Punjab	50,362	1,138	1,847	5.93	5	30	29	-1

Source: RBI Handbook of Statistics on Indian States 2022-23

## EASE OF DOING BUSINESS

Ease of Doing Business is a critical factor in attracting investments and facilitating economic development. India ranks 63<sup>rd</sup> of 190 economies according to the Ease of Doing Business report published by World Bank. This is a jump from the 142<sup>nd</sup> rank India received in 2014. The World Bank Ease of Doing Business report analyses countries based on 10 parameters. India has consistently been one of the top 10 improvers in these parameters between 2014-2019. Some notable steps taken by the government is the introduction of SPICe+ and Agile pro-S forms by the Ministry of Corporate Affairs to facilitate easier company registration and starting a business. Obtaining construction permits and registering property has also been streamlined by the government. The Department of Promotion of Industry and Internal Trade (DPIIT) introduced the Business Reforms Action Plan (BRAP) at the state level to emulate the steps taken at the central level and create a conducive business environment. The recent report of States and Union Territories and their adherence to the 2020 Business Reforms Action Plan was released in 2022. The BRAP 2020 consisted of 301 reforms recommended by the central government across 15 regulatory areas such as Labour, Environment, Access to Information, Land Administration & Transfer of Land and Property,

Utility Permits, among others. Based on their compliance with the BRAP and additional business reforms, the Reserve Bank of India publishes a report ranking the states' overall ease of doing business.

**Andhra Pradesh, Uttar Pradesh, Telangana, Madhya Pradesh, and Jharkhand compose the top 5 in this parameter, having implemented the most reforms to create a conducive business environment. Notably, Uttar Pradesh has significantly improved its ranking moving up by 10 positions since 2019. Delhi, which slipped in rankings between 2015-2019, strengthened its business regulations to increase its ranking by 11 positions.**

FIGURE 33: 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 34: POINT ALLOCATION FOR EASE OF DOING BUSINESS

State	Ease of Doing Business Score	Points Obtained	Rank 2024	Rank 2019	Variance (19-24)
Andhra Pradesh	1	10	1	1	-
Uttar Pradesh	2	10	2	12	10
Telangana	3	10	3	2	-1
Madhya Pradesh	4	10	4	7	3
Jharkhand	5	10	5	4	-1
Chhattisgarh	6	8	6	6	-
Himachal Pradesh	7	8	7	16	9
Rajasthan	8	8	8	9	1
West Bengal	9	8	9	10	1
Gujarat	10	8	10	5	-5
Uttarakhand	11	6	11	11	-
Delhi	12	6	12	23	11
Maharashtra	13	6	13	13	-
Tamil Nadu	14	6	14	15	1
Haryana	16	4	16	3	-13
Karnataka	17	4	17	8	-9
Punjab	19	4	19	20	1
Assam	20	4	20	17	-3
Jammu & Kashmir	21	2	21	22	1
Goa	24	2	24	19	-5
Mizoram	25	2	25	26	1
Bihar	26	0	26	18	-8
Kerala	28	0	28	21	-7
Arunachal Pradesh	29	0	29	29	-
Manipur	29	0	29	27	-2
Meghalaya	29	0	29	29	-
Nagaland	29	0	29	25	-4
Odisha	29	0	29	14	-15
Sikkim	29	0	29	28	-1
Tripura	29	0	29	24	-5

Source: Reserve Bank of India

## CLEANLINESS

This year, cleanliness has been introduced as one of the two new parameters for evaluating states. Over the past decade, the central government has closely monitored cleanliness, particularly since the launch of the Swachh Bharat Abhiyan in 2014. In the realm of travel & tourism, a state's hygiene and cleanliness play a crucial role in attracting tourists, contributing to the overall positive image of the state. Furthermore, cleanliness and waste disposal facilities are vital considerations in the planning of tourism infrastructure. Given its indirect impact, cleanliness has been assigned a weightage of 10 in the assessment.

As part of the Swachh Bharat initiative, the central government regularly releases Swachh Survekshan rankings, where states and cities are analysed for their cleanliness initiatives and awarded accordingly. These rankings serve as the basis for evaluating states under the cleanliness parameter.

**The top five states, based on this metric, are Maharashtra, Madhya Pradesh, Chhattisgarh, Odisha, and Telangana. These rankings reflect the effectiveness of the states' cleanliness initiatives, as assessed by the central government as part of the Swachh Bharat Abhiyan.**

FIGURE 35: METHODOLOGY FOR CLEANLINESS

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 36: POINT ALLOCATION FOR CLEANLINESS

State	Cleanest State Ranking	Points Obtained	Rank 2024
Maharashtra	1	10	1
Madhya Pradesh	2	10	2
Chhattisgarh	3	10	3
Odisha	4	10	4
Telangana	5	10	5
Andhra Pradesh	6	8	6
Punjab	7	8	7
Gujarat	8	8	8
Uttar Pradesh	9	8	9
Tamil Nadu	10	8	10
Sikkim	11	6	11
Karnataka	12	6	12
Goa	13	6	13
Haryana	14	6	14
Bihar	15	6	15
Jharkhand	16	4	16
Manipur	17	4	17
Himachal Pradesh	18	4	18
Uttarakhand	19	4	19
Assam	20	4	20
Meghalaya	21	2	21
Tripura	22	2	22
Kerala	23	2	23
Nagaland	24	2	24
Rajasthan	25	2	25
Mizoram	26	0	26
Arunachal Pradesh	27	0	27
Delhi	28	0	28
Jammu & Kashmir	28	0	28
West Bengal	28	0	28

Source: Swachh Survekshan Report 2023

# SMART CITY INITIATIVE

The Smart City Mission was introduced by the Government of India in 2015 as an attempt to develop and promote cities that provide essential infrastructure, a clean and sustainable environment and good quality of life using 'Smart' solutions driven by technology. 110 cities across the country have been identified as potential Smart Cities, and Uttar Pradesh and Tamil Nadu have the highest number of identified Smart Cities with 12 each ready for development. This initiative is anticipated to have an indirect positive impact on travel and tourism as it is expected to boost economic growth in the identified cities and their ancillary areas. Because its impact is indirect rather than direct, this metric has been awarded a lower weightage of 5 points. The success of states under this metric is based on the deployment of the allocated funds to develop cities under this mission. West Bengal ranks the highest having disbursed nearly 100% of its allocated smart city funds for the development of four identified Smart Cities - New Town Kolkata, Bidhannagar, Durgapur and Haldia. Sikkim, Nagaland,

Madhya Pradesh and Gujarat have all also disbursed around 95% of their smart city funds. On the other hand, Meghalaya, Mizoram and Assam rank at the bottom of the list having deployed less than half the funds allocated to the states to develop the identified Smart City in each state. Going forward, the development of these cities will provide tourism and tourism investment opportunities in these states and allow the sector to grow.

FIGURE 37: METHODOLOGY FOR SMART CITY INITIATIVE

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 38: POINT ALLOCATION FOR SMART CITY INITIATIVES

State	GOI Budget (₹Crores)	Fund Disbursed (₹Crores)	Fund Utilisation %	Points Obtained	Rank 2024
West Bengal	196	196	99.8%	5	1
Sikkim	537	536	99.8%	5	2
Nagaland	196	192	97.7%	5	3
Madhya Pradesh	2,262	2,170	95.9%	5	4
Gujarat	1,870	1,773	94.8%	5	5
Tripura	250	230	91.8%	4	6
Odisha	645	588	91.2%	4	7
Andhra Pradesh	1,824	1,657	90.9%	4	8
Kerala	392	351	89.6%	4	9
Telangana	392	350	89.4%	4	10
Uttarakhand	252	225	89.2%	3	11
Haryana	490	422	86.1%	3	12
Chhattisgarh	543	464	85.5%	3	13
Maharashtra	2,401	2,050	85.4%	3	14
Tamil Nadu	3,977	3,375	84.9%	3	15
Himachal Pradesh	439	369	83.9%	2	16
Jharkhand	490	396	80.7%	2	17
Uttar Pradesh	2,510	2,000	79.7%	2	18
Rajasthan	1,666	1,283	77.0%	2	19
Karnataka	2,213	1,683	76.0%	2	20
Manipur	196	144	73.4%	1	21
Jammu & Kashmir	322	229	71.1%	1	22
Delhi	294	204	69.3%	1	23
Bihar	510	314	61.5%	1	24
Goa	196	116	59.1%	1	25
Punjab	694	384	55.3%	0	26
Arunachal Pradesh	304	157	51.7%	0	27
Meghalaya	55	22	40.0%	0	28
Mizoram	128	51	39.8%	0	29
Assam	196	61	31.2%	0	30

Source: Ministry of Housing and Urban Affairs 2021-22



# INTANGIBLE ASPECTS

The Travel & Tourism industry are highly susceptible to fluctuations and relies on various factors within each state. Therefore, when evaluating states, certain intangible and subjective factors are considered. The intangible rating focuses on three crucial elements: (i) Safety and Security, (ii) Human Resources, and (iii) Political Stability.

Safety and security assessment involves evaluating crime rates, law and order conditions, and overall personal safety within the state. Human Resources evaluation is influenced by the availability of skilled and qualified personnel for the Travel & Tourism industry. Finally, Political Stability refers to the current government, its tenure, and the steps taken for further development. Each of these aspects is given a rating out of 5 points, and the final score for each state is derived. To mitigate the impact of subjective analyses, a medium weight of 15 points is assigned to this parameter.

Leading in this parameter is Gujarat, followed by Delhi, Goa, Madhya Pradesh, Rajasthan, Tamil Nadu, Telangana, and Uttar Pradesh jointly at the 2<sup>nd</sup> position. Notably, Madhya Pradesh has rebounded to the 2<sup>nd</sup> position after slipping to the 25<sup>th</sup> position in 2018 due to political instability. However, Manipur and Himachal Pradesh have experienced a decline of 19 and 17 positions respectively, attributed to recent political instability and challenges to safety and security.

While Punjab and Sikkim have consistently performed well in these aspects, they were unable to keep pace with the improvements shown by other states, resulting in a decline in their rankings.

Regarding safety and security, Gujarat, Madhya Pradesh, Rajasthan, Mizoram, and Nagaland rank the highest, boasting a perfect score due to their lower crime rates and incidences. States with large Tier 1 cities like New Delhi, Hyderabad, and Bengaluru, such as Delhi, Telangana, and Karnataka, rank highest in terms of the availability of skilled personnel.

Most states maintain a stable political situation, with only six states ranking below the four-point mark. Lower rankings are typically associated with recent changes in political leadership before the end of a term or significant political instability.

Two states have shown consistent improvement in the three intangible aspects. The first of these is Madhya Pradesh, having grown 23 places compared to 2019. This can be attributed to its improvement in all three aspects, especially in security. The second state with the largest improvement over the last decade is Uttar Pradesh, having grown 21 places since 2013 after seeing a drop between 2009 and 2013.

FIGURE 39: POINT ALLOCATION FOR INTANGIBLE ASPECTS

State	Points Obtained			Total	Rank				Variance		
	Security	HR	Political Stability		2024	2019	2013	2009	(19-24)	(13-24)	(09-24)
Gujarat	5	4	5	14	1	1	1	1	-	-	-
Delhi	4	5	4	13	2	9	10	8	7	8	6
Goa	4	4	5	13	2	9	23	1	7	21	-1
Madhya Pradesh	5	4	4	13	2	25	4	8	23	2	6
Rajasthan	5	4	4	13	2	5	1	1	3	-1	-1
Tamil Nadu	4	4	5	13	2	9	1	1	7	-1	-1
Telangana	4	5	4	13	2	5			3	-2	-2
Uttar Pradesh	4	4	5	13	2	9	23	18	7	21	16
Andhra Pradesh	4	4	4	12	9	5	28	8	-4	19	-1
Kerala	4	4	4	12	9	9	16	8	-	7	-1
Odisha	4	3	5	12	9	5	10	16	-4	1	7
Karnataka	3	5	3	11	12	20	10	1	8	-2	-11
Mizoram	5	2	4	11	12	9	16	21	-3	4	9
Nagaland	5	2	4	11	12	20	23	21	8	11	9
Punjab	4	4	3	11	12	1	4	8	-11	-8	-4
Sikkim	4	3	4	11	12	1	4	8	-11	-8	-4
Tripura	4	2	5	11	12	9	16	27	-3	4	15
Arunachal Pradesh	4	2	4	10	18	20	16	18	2	-2	-
Assam	3	2	5	10	18	20	10	21	2	-8	3
Haryana	3	3	4	10	18	9	16	8	-9	-2	-10
Himachal Pradesh	3	3	4	10	18	1	4	1	-17	-14	-17
Jammu & Kashmir	3	3	4	10	18	30	10	21	12	-8	3
Maharashtra	4	4	2	10	18	9	4	16	-9	-14	-2
Meghalaya	4	3	3	10	18	25	10	18	7	-8	-
Uttarakhand	3	3	4	10	18	9	4	1	-9	-14	-17
West Bengal	2	4	4	10	18	20	16	8	2	-2	-10
Chhatisgarh	3	2	4	9	27	25	16	27	-2	-11	-
Jharkhand	3	2	3	8	28	25	29	21	-3	1	-7
Manipur	2	2	4	8	28	9	23	21	-19	-5	-7
Bihar	3	2	2	7	30	25	23	27	-5	-7	-3

Source: Hotelivate Analysis

# STATE RANKING: NORTHEASTERN STATES

The northeastern states of India boast a vibrant tapestry of cultural diversity, breathtaking landscapes, and rich traditions. In recent years, tourism in the northeast has surged, particularly following the revision of the 'Look East Policy' to the more proactive 'Act East Policy.' This diplomatic initiative aims to foster economic, strategic, and cultural ties, facilitating extensive engagement with Southeast Asian nations across various sectors including connectivity, trade, culture, and defence.

Through strategic measures implemented by the tourism ministry and partnerships with leading online travel platforms like MakeMyTrip, over 600 offbeat destinations, including numerous northeastern cities, are being showcased to travellers. However, despite progress, there remains immense untapped potential for infrastructure development and sustainable tourism growth in the region.

FIGURE 40: PERFORMANCE BASED RANK

State	Northeast Rank 2024
Sikkim	1
Tripura	2
Nagaland	3

FIGURE 42: BIGGEST MOVERS 2013 TO 2024

State	All-India Rank 2024	All-India Rank 2013	Variance (13-24)
Meghalaya	25	28	3
Arunachal Pradesh	30	24	-6
Sikkim	11	8	-3
Mizoram	24	21	-3

To better gauge progress and competitiveness, our recent survey took a closer look at the Northeastern states individually, rather than solely comparing them against the nationwide group. Sikkim, Tripura, and Nagaland emerged as the top performers among their northeastern counterparts in the 2024 edition. Sikkim, maintaining its regional dominance, also significantly improved its national ranking, climbing four places since the last assessment. Tripura secured the 2<sup>nd</sup> position, excelling in areas such as tourism expenditure and infrastructure development. Conversely, Arunachal Pradesh faced challenges ranking lowest both regionally and nationally due to shortcomings in various parameters assessed. This underscores the need for targeted interventions to address deficiencies and maximise the northeast's tourism potential.

FIGURE 41: BIGGEST MOVERS 2019 TO 2024

State	All-India Rank 2024	All-India Rank 2019	Variance (19-24)
Sikkim	11	15	4
Nagaland	23	26	3
Manipur	27	29	2

FIGURE 43: BIGGEST MOVERS 2009 TO 2024

State	All-India Rank 2024	All-India Rank 2009	Variance (09-24)
Tripura	22	28	6
Meghalaya	25	29	4
Sikkim	11	81	-3
Arunachal Pradesh	30	4	-16

## ALL INDIA: THE BIGGEST MOVERS

In this section, we explore the rankings of states that have experienced significant improvements or deteriorations compared to the previous survey, over the last decade and since 2009.

When looking at the state rankings since its conception, the cases of Gujarat and Uttar Pradesh stand out.

A noteworthy example among the top performers is Gujarat. While the state was absent from the top 10 until 2015, it has steadily climbed the rankings in the past 15 years, securing the top spot this year. Gujarat excels in all metrics and claims the 1<sup>st</sup> position in tourist footfall. However, its hotel supply still lags when compared to hospitality giants like Goa and Delhi. Chhattisgarh and Madhya Pradesh are also notable movers, each advancing by five positions. Both states benefited from the newly introduced cleanliness metric, scoring well in this aspect. Additionally, their ease of doing business rankings give them an advantage in the total rankings. Sikkim continues its positive trajectory, experiencing improvements in state expenditure on tourism and an increase in tourist footfall.

The case of Uttar Pradesh is also intriguing when compared to 2009. Since the beginning of this report, Uttar Pradesh has become the 2<sup>nd</sup> most improved state with a rapid increase in domestic tourism. In 2023, the state witnessed 38 crore tourist footfall continuing the growth trajectory established in recent years. This

is facilitated by the development and promotion of destinations such as Ayodhya, Varanasi, Lucknow and Vrindavan.

Conversely, West Bengal and Rajasthan have slipped in the rankings. Despite a strong performance in the Smart City Initiative metric, West Bengal has dropped five positions since 2019 due to reduced spending on tourism. Rajasthan faces a similar challenge of massive cuts in spending on the promotion of the Travel & Tourism industry in the state.

Looking at the 10 year comparison, Jammu & Kashmir and Arunachal Pradesh have witnessed a significant decline. These states have struggled to make progress on the analysed parameters. While Jammu & Kashmir improved state expenditure on tourism, crucial support infrastructure such as road and railway networks remain underdeveloped.

FIGURE 44: BIGGEST MOVERS 2019 TO 2024

State	Rank 2024	Rank 2019	Variance (19-24)
Gujarat	1	7	6
Madhya Pradesh	12	17	5
Chhattisgarh	21	26	5
Sikkim	11	15	4
West Bengal	12	7	-5
Rajasthan	16	11	-5
Jammu & Kashmir	25	18	-7

FIGURE 45: BIGGEST MOVERS 2013 TO 2024

State	Rank 2024	Rank 2013	Variance (13-24)
Gujarat	1	12	11
Jharkhand	18	29	11
Chhattisgarh	21	27	6
Madhya Pradesh	12	18	6
Arunachal Pradesh	30	24	-6
Bihar	29	20	-9
Jammu & Kashmir	25	10	-15

## THE TOP FIVE

### GUJARAT

In a surprising turn of events this year, Gujarat climbed up six spots and surpassed Goa to become the top performing state. The state experienced a remarkable increase in footfall, including a substantial influx of international visitors, a trend not commonly observed in recent years.

Back in 2013, Gujarat held the 12th position, just missing out on the top 10. However, over the past decade, the state has consistently enhanced its tourism infrastructure, drawing in more visitors and ultimately claiming the top spot. Gujarat's impressive marketing campaigns have also garnered significant online attention.

Additionally, the state's high rankings in literacy rate, green cover, and ease of doing business have played a pivotal role in securing its well-deserved position as the top performer. Gujarat has excelled in newly introduced metrics such as cleanliness and smart city initiatives, consistently ranking among the top 10.

Furthermore, Gujarat has tripled its expenditure on tourism compared to 2018, reflecting the government's commitment to developing the state as an attractive tourist destination. The results are evident in the state's highest footfall compared to all other states, particularly leading the nation in terms of international visitors. The inauguration of the Statue of Unity in 2018 has contributed significantly to this success, not only as an appealing destination but also as home to India's first waterdrome, facilitating travel via seaplane.

Looking ahead, the state's upcoming smart city developments, are expected to further boost the GSDP, employment, and ease of doing business as commercial investment increases in the state.

### GOA

According to the last few state ranking reports, Goa has consistently ranked among the top states, often securing either the second or third position in consolidated state rankings. In 2019, it even claimed the top spot in the survey. This year, the competition was fierce between Goa and Gujarat for the top spot. However, despite previous successes, Goa has encountered challenges, notably in its spending. Even after achieving a state of euphoria, the state has further reduced its expenditure, which had already been cut to 7.6% in 2019 against the 2017 budget.

Despite India's position as the third highest in domestic tourism movements globally, with over 2 billion tourist movements, projections indicate a potential increase to 5 billion by 2030, averaging approximately four trips per capita. However, Goa has struggled to match its 2019 tourist visit numbers, primarily due to a significant decline in international visits.

On a positive note, the recent opening of the MOPA airport and improvements in connectivity have led to an uptick in airport traffic, with expectations of further growth in the future.

Despite these developments, Goa's performance has been deemed average following the introduction of new ranking parameters.

FIGURE 46: BIGGEST MOVERS 2009 TO 2024

State	Rank 2024	Rank 2009	Variance (09-24)
Gujarat	1	13	12
Uttar Pradesh	10	19	9
Karnataka	6	12	6
Bihar	29	19	-10
Arunachal Pradesh	30	14	-16
Jammu & Kashmir	25	5	-20

### MAHARASHTRA

Moving up one position from the previous year, Maharashtra has now secured a spot in the top 3, surpassing Delhi. This shift can be attributed to notable improvements in the crucial aspect of state expenditure on tourism. The state's heightened emphasis on tourism is evident in its robust online presence, ranking among the top 10 in terms of both social media followers and website traffic.

Despite these positive developments, it is noteworthy that tourist arrivals in the state have not yet reached the levels observed in 2018. Boasting the nation's financial capital, Mumbai, Maharashtra stands out as an appealing destination for both investment and the establishment of new hotels. The government's newfound commitment to promoting tourism suggests that it will play a significant role in the state's economy in the foreseeable future.

### DELHI

Delhi, which has consistently maintained a top 3 position in state rankings since 2011, experienced a slight decline in its standing this year, slipping to the 4<sup>th</sup> position behind its close competitor, Maharashtra. Despite this, the state continues to excel in various parameters, including the presence of branded hotel rooms, GSDP per capita, urbanisation rate, quality of road and rail infrastructure, aircraft movement, and literacy rate. Notably, Delhi has secured the top position in 4 out of 14 parameters assessed.

However, there are areas where Delhi urgently needs improvement, particularly in state expenditure. This year, Delhi witnessed a significant drop in its ranking in this category, plummeting from 13<sup>th</sup> to 26<sup>th</sup> place, reflecting a variance of -13. Additionally, the ease of doing business remains a concern. Despite being the nation's capital, Delhi struggles to provide an encouraging and simplified ecosystem for business owners, hindering its competitiveness in this regard. Addressing these challenges will be crucial for Delhi to maintain its standing and foster sustainable growth in future.

### TAMIL NADU

Tamil Nadu has experienced a decline in its ranking from 2<sup>nd</sup> to 5<sup>th</sup> position compared to the previous edition. Despite boasting significant tourist visits, robust connectivity, and infrastructure, the state has failed to secure a position in the top 5 states across any of the parameters evaluated.

Tamil Nadu's progress seems to lag in several areas, including state expenditure on tourism, ease of doing business, and presence of branded hotel rooms. The state has struggled to meet the demand and has lost points due to insufficient planned hotel developments in the region.

Nevertheless, Tamil Nadu continues to attract a high volume of domestic and international tourists primarily attributed to its popularity as a pilgrimage destination. The state also performs admirably in other key parameters, ranking in the top 10 for the presence of branded hotel rooms, GSDP per capita, urbanisation, aircraft movement, and in terms of security, human resources, and political stability.

However, Tamil Nadu remains at the lower end of the rankings concerning expenditure on tourism, indicating a need for enhanced investment and strategic planning in this area.

FIGURE 47: CONSOLIDATED RANKINGS

State	Expenditure on Tourism	Tourist Visits	Branded Hotel Rooms	GSDP per Capita	Marketing	Urbanisation	Road & Railway Infrastructure	Aircraft Movement	Literacy Rate	Green Cover	Ease of Doing Business	Cleanliness	Smart City Initiative	Intangible	Total Points Obtained	Ranking	% of Total	Rank						Variance		
																		2019	2017	2015	2013	2011	2009	(19-24)	(13-24)	(09-24)
Gujarat	20	30	7	7.5	10	4	5	6	3	8	8	8	5	14	135.5	1	74.0%	7	8	11	12	14	13	6	11	12
Goa	25	10	13	10	7	6	7	4	5	17	2	6	1	13	126.0	2	68.9%	1	2	3	3	2	3	-1	1	1
Maharashtra	15	27	10	5	7	4	6	10	4	8	6	10	3	10	125.0	3	68.3%	4	2	1	2	1	4	1	-1	1
Delhi	5	23	13	10	5	10	10	10	5	11	6	0	1	13	122.0	4	66.7%	3	1	2	1	3	6	-1	-3	2
Tamil Nadu	5	27	8	7.5	6	4	8	8	4	11	6	8	3	13	118.5	5	64.8%	2	4	5	7	4	1	-3	2	-4
Karnataka	10	23	10	7.5	10	4	6	10	2	11	4	6	2	11	116.5	6	63.7%	8	7	4	5	4	12	2	-1	6
Uttarakhand	25	17	9	5	9	2	3	2	3	17	6	4	3	10	115.0	7	62.8%	10	12	18	9	8	7	3	2	-
Kerala	10	17	12	5	10	4	9	6	5	17	0	2	4	12	113.0	8	61.7%	5	6	7	5	6	2	-3	-3	-6
Telangana	15	17	7	7.5	6	4	3	8	0	8	10	10	4	13	112.5	9	61.5%	9	13	10	0	0	0	-	-	-9
Uttar Pradesh	10	30	5	0	6	2	7	4	1	5	10	8	2	13	103.0	10	56.3%	13	13	12	15	12	19	3	5	9
Sikkim	25	7	6	10	4	2	2	2	4	17	0	6	5	11	101.0	11	55.2%	15	22	8	8	9	8	4	-3	-3
Madhya Pradesh	10	20	2	2.5	9	2	3	2	1	11	10	10	5	13	100.5	12	54.9%	17	15	16	18	18	15	5	6	3
West Bengal	5	27	7	2.5	3	2	9	8	3	11	8	0	5	10	100.5	12	54.9%	7	8	11	12	14	13	-5	-	1
Andhra Pradesh	5	23	2	5	6	2	5	4	1	8	10	8	4	12	95.0	14	51.9%	14	10	14	14	15	10	-	-	-4
Punjab	5	20	11	5	2	4	9	2	3	5	4	8	0	11	89.0	15	48.6%	12	9	8	11	11	15	-3	-4	-
Rajasthan	5	24	5	5	9	2	2	4	0	5	8	2	2	13	86.0	16	47.0%	11	11	14	13	13	11	-5	-3	-5
Himachal Pradesh	10	10	6	5	5	0	3	2	4	14	8	4	2	10	83.0	17	45.4%	16	19	21	15	17	17	-1	-2	-
Jharkhand	10	16	0	2.5	3	2	6	2	0	14	10	4	2	8	79.5	18	43.4%	20	24	23	29	25	24	2	11	6
Odisha	10	7	0	2.5	8	0	6	2	2	14	0	10	4	12	77.5	19	42.3%	18	21	19	19	20	17	-1	-	-2
Haryana	10	2	13	7.5	3	2	6	2	2	5	4	6	3	10	75.5	20	41.3%	21	16	13	17	16	21	1	-3	1
Chhattisgarh	10	5	0	2.5	4	2	1	2	1	14	8	10	3	9	71.5	21	39.1%	26	20	27	27	28	27	5	6	6
Tripura	5	2	2	2.5	2	2	7	2	5	20	0	2	4	11	66.5	22	36.3%	22	24	29	23	23	28	-	1	6
Nagaland	10	0	0	2.5	0	2	5	2	4	20	0	2	5	11	63.5	23	34.7%	26	27	26	21	23	22	3	-2	-1
Mizoram	10	0	0	5	2	6	0	2	5	20	2	0	0	11	63.0	24	34.4%	23	23	22	21	21	22	-1	-3	-2
Jammu & Kashmir	20	7	2	2.5	3	2	1	2	1	8	2	0	1	10	61.5	25	33.6%	18	17	17	10	10	5	-7	-15	-20
Meghalaya	10	4	0	2.5	4	2	3	2	2	20	0	2	0	10	61.5	25	33.6%	24	30	30	28	29	29	-1	3	4
Assam	5	7	0	2.5	0	0	8	4	2	14	4	4	0	10	60.5	27	33.1%	25	26	28	25	27	26	-2	-2	-1
Manipur	15	2	0	2.5	2	2	2	2	3	17	0	4	1	8	60.5	27	33.1%	29	28	25	25	26	25	2	-2	-2
Bihar	10	16	0	0	5	0	8	2	0	5	0	6	1	7	60.0	29	32.8%	26	18	20	20	19	19	-3	-9	-10
Arunachal Pradesh	15	0	0	5	2	2	0	2	0	20	0	0	0	10	56.0	30	30.6%	30	29	24	24	22	14	-	-6	-16

Source: Hotelivate Research

# KNOWLEDGE CENTRE

Servicing clients across the APAC and Middle East region, Hotelivate offers a comprehensive consulting environment through a diverse team of consultants that have a combined professional experience of 250 years across varied hospitality verticals. We assist clients from the inception to the divestment of their hospitality venture, by offering an entire spectrum of services that aim to ensure tangible value-adds for clients.

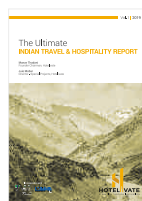
Hotelivate has conducted over a 1,000 feasibility studies; valued 1,500-plus hotels; negotiated and signed about 80 management contracts; executed more than 100 different asset management assignments and successfully closed 700-plus executive searches.

## PUBLICATIONS & REPORTS



### 2019 India Hotel Manpower Study<sup>®</sup>

The 2019 India Hotel Manpower Study<sup>®</sup> surveys 204 hotels across 68 cities and several domestic and international hotel chains, providing a detailed analysis of payroll cost, employee productivity, room to manpower ratio and annual attrition percentages across key parameters.



### The Ultimate Indian Travel & Hospitality Report 2019 | Volume 1

The Ultimate Indian Travel & Hospitality Report presents the size of the Indian hospitality industry, including the informal/unbranded sector. The report establishes the number of people directly employed by the industry as well as the tax revenue generated by it.



### Hotel Management Contract Survey 2020 | South Asia

The Hotel Management Contract Survey 2020 entails a comprehensive review of 85 contracts/LOIs, representing around 16,200 rooms, signed in the region over the last two decades. This substantive report highlights the key terms and clauses of hotel management agreements, provides broad definitions, and discusses trends over time.

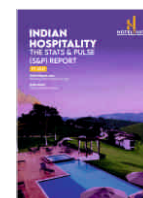


### India State Ranking Survey | 6<sup>th</sup> Edition

The State Ranking Survey aims at assessing the relative competitiveness of India's states and union territories, by analysing each individual state's potential for Travel & Tourism.

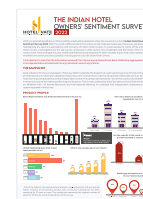
### Indian Hospitality – The Stats & Pulse (S&P) Report – FY 2021

The Indian Hospitality – The Stats and Pulse (S&P) Report- FY 2021 sheds light on the facts that have defined the financial year 2020/21; it compares various trendlines against pre-COVID years and it tables our estimation and objective view on the recovery path ahead.



### The Indian Hotel Owners' Sentiment Survey 2022

The Indian Hotel Owners' Sentiment Survey 2022 was aimed at highlighting the opinions, perceptions, and concerns of Indian Hotel Owners in a post-pandemic world. The survey represents ~30,000 rooms (~21% of the branded supply in India) having affiliations with ~22 brands.



### 2023 Hotel Development Cost Survey India

The 2023 Development Cost survey showcases the results of an extensive review of the actual development costs of nearly 500 hotels, considering various positioning and locations. The survey encompasses hotels constructed between 2002 and 2022, providing valuable insights into trends and factors impacting the industry.



### 2023 Indian Hospitality Trends & Opportunities

The Trends & Opportunities Report analyses the key hospitality trends, highlighting 20 major Indian markets. The report also presents existing and future opportunities in the hospitality industry of interest to investors, developers and hotel operators.



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Hotelivate is a new-age hospitality consulting firm offering specialized services to clients across the Asia Pacific and Middle East region. Hotelivate offers a comprehensive consulting environment through a diverse team of consultants that have a combined professional experience of 250 years across varied hospitality verticals. The firm presently has offices in Delhi, Mumbai, Singapore, Dubai and Bangkok.

## CONFERENCES & EVENTS



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**INDIA**  
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