



Sustainability in tourism

Reimagining India's sustainable tourism evolution



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Executive summary

The onset of COVID-19 and the ensuing travel restrictions, lockdowns, and health concerns led to a dramatic contraction of the global tourism sector. International tourist arrivals plummeted, recording a fall of over 72 per cent in 2020¹, the sharpest decline in the history of world tourism according to the UNWTO. The pandemic led to an unprecedented crisis in the tourism sector globally and in India, with a dramatic decline in international tourist arrivals, massive economic losses, and substantial job risks. The Indian tourism and hospitality industry, characterised by its significant contribution to GDP and employment, faced severe setbacks. However, this crisis also catalysed innovation within the sector, accelerating the adoption of new health and safety standards, digitalisation, and sustainable practices, alongside a shift towards domestic tourism as international travel restrictions persisted.

In the recovery phase, India's tourism sector is experiencing a resurgence, driven by an increase in domestic travel and a cautious return of international tourists. With improvements in Foreign Tourist Arrivals (FTAs) and Domestic Tourist Visits (DTVs), the sector is gradually moving towards pre-pandemic levels. The focus is now on sustainable

growth and leveraging emerging trends to foster a resilient tourism sector. The government's emphasis on eco-tourism and sustainable practices reflects a strategic shift towards ensuring the long-term viability and integrity of India's natural and cultural assets.

The global sustainable tourism market size was estimated at USD2.73 trillion in 2023 and is projected to hit around USD9.17 trillion by 2032, registering a CAGR of 14.40 per cent during the forecast period from 2023 to 2032.² The sustainable tourism market size in India was valued at USD26.01 million in 2022 and is anticipated to reach USD151.88 million by 2032, with a rapid CAGR of 19.3 per cent from 2022 to 2032.³ The integration of sustainable tourism principles across all tourism forms and destinations is considered essential for making the sector more responsible and resilient.

1. "Impact assessment of the COVID-19 outbreak on international tourism", UN Tourism, February 2024
2. "Sustainable Tourism Market Size to Hit USD 9.17 Trillion By 2032", Precedence Research, December 2023

3. "India Sustainable Tourism Market Size, Share & Trends – 2032, Future Market Insights, July 2022



To understand the global sustainable tourism landscape, it is important to analyse the existing practices in the sector. By adopting and adapting to these practices, destinations and businesses can mitigate their environmental and social impacts and enhance the competitiveness and appeal of their offerings. The shift towards sustainability in tourism is not just a response to increasing regulatory and consumer pressures but a proactive approach to securing the future of the sector and the environments and communities it depends upon.

The transition to a sustainable tourism model presents multifaceted challenges, including environmental degradation, economic vulnerabilities, and socio-cultural disruptions. This report provides recommendations for promoting sustainable tourism in India, encompassing

community-level interventions, development of tax strategies for sustainability, leveraging supply chains, and mainstreaming sustainability practices within the tourism sector. These recommendations aim to mitigate challenges and capitalise on opportunities for sustainable growth.

The executive summary encapsulates the report's detailed analysis of the impact of the COVID-19 pandemic on the tourism industry, the recovery trajectory, and the strategic emphasis on sustainable tourism as a cornerstone for future development. It underscores the need for a balanced approach to tourism development, integrating economic growth with environmental stewardship and social inclusiveness, to ensure the resilience and sustainability of India's tourism sector.



Tourism: Road to recovery and future horizons

01



1.1. Impact of COVID-19 on the tourism industry

The COVID-19 pandemic left an indelible mark on the fabric of global tourism, triggering an unprecedented crisis with far-reaching economic, social, and environmental implications. This has opened discussions on the impacts of the pandemic on the tourism industry worldwide focusing upon the specific challenges and opportunities that emerged for India.

The onset of COVID-19 and the ensuing travel restrictions, lockdowns, and health concerns led to a dramatic contraction of the global tourism sector. International tourist arrivals plummeted, recording a fall of over 72 per cent in 2020¹, the sharpest decline in the history of world tourism according to the United Nations World Tourism Organisation (UNWTO). This collapse not only halted travel but also caused massive economic losses, estimated in trillions of dollars, and endangering over 100 million direct tourism jobs¹.

India, with its diverse landscapes, historical monuments, and a rich cultural heritage, has long been a magnet for both international and domestic tourists. However, the pandemic significantly impacted the Indian tourism sector, with the country witnessing a steep decline in tourist arrivals. The lockdowns and travel bans brought the industry to a near standstill, with significant losses in revenue and employment. In 2020, the Indian tourism and hospitality industry was one of the hardest hits, witnessing its share to India's GDP fall by 36.3 per cent (a decline of almost USD70 billion), and its

share to total employment decline by 20.8 per cent (around 8.3 million job losses)². The ripple effects were felt across the ecosystem, from major hotel chains to small-scale vendors and tour operators, reflecting a sector grappling with survival.

The crisis, however, has also been a catalyst for change, pushing the Indian tourism industry towards innovation and resilience. Stakeholders across the board adopted new health and safety standards, digitalisation, and sustainable practices to adapt to the new normal. Virtual tourism, once a novelty, is a stopgap solution, offering immersive experiences of India's heritage sites and natural wonders.

The pandemic underscored the necessity for a more sustainable and resilient tourism sector. There is a growing consensus on the need to balance economic objectives with social and environmental considerations. For India, this means leveraging its cultural and natural assets while ensuring that tourism development does not come at the expense of ecological balance or community well-being. The road to recovery for India's tourism sector involves embracing sustainable practices, enhancing digital infrastructure, and fostering community-based tourism models that can contribute to inclusive growth and environmental conservation. As the world gradually recovers, the lessons learned during the pandemic can pave the way for a more sustainable, resilient, and vibrant tourism industry in India.



1. "Impact assessment of the COVID-19 outbreak on international tourism", UN Tourism, February 2024
2. "Impact of COVID-19 on individual income in tourism and hospitality industry in India: A difference-in-differences approach", Abhradeep Maiti, NLM, November 2022

1.2. Current state of tourism in India

India was ranked 54th on the World Economic Forum Travel & Tourism Development Index (2022) and 6th in terms of Travel & Tourism's total contribution to Gross Domestic Production (GDP) in 2021 according to the World Travel and Tourism Council (WTTC).³ In terms of economic contribution, the travel and tourism sector contributed 5.8 per cent to GDP and the sector created 32.1 million jobs, which is equivalent to 6.9 per cent of total jobs in 2021.⁴

In 2018 and 2019 India has seen 10.56 million and 10.93 million Foreign Tourist Arrivals (FTAs) respectively. This number dipped to 2.74 million in 2020 and 1.54 million in 2021, primarily as a result of the lockdown prompted by COVID-19.⁵ However, there was a sharp increase in the numbers of domestic travellers and foreign visitors in 2022 as a result of easing lockdown restrictions and opening of international borders. India witnessed 6.43 million FTAs (as of September 2023) recording an annual

growth of 305.4 per cent in 2022.³ In the same year, the Domestic Tourist Visits (DTVs) to all States/UTs recorded 1.73 billion³, providing an indication towards recovery of the tourism sector during pre-pandemic levels.

Going forward, it is estimated that India's tourism sector will achieve the pre-pandemic level of foreign exchange earnings of USD30 billion and 15 million foreign arrivals by mid-2024, totaling a USD50 billion GDP contribution from tourism.⁶ By 2028, India's tourism and hospitality industry is projected to generate revenue of over USD59 billion while Foreign Tourist Arrivals (FTAs) are anticipated to reach 30.5 million.³ As indicated by these projections, the outlook for India's tourism sector remains optimistic, with potential for significant contribution to the country's economic recovery and sustainable development.

1.3. Future focus areas for tourism

The COVID-19 pandemic forced the global tourism sector to confront unprecedented challenges. However, it also provided an opportunity for innovation and transformation. Both businesses and governments were given the opportunity to understand and take advantage of emerging trends as a result of the change in the tourism sector's trajectory. As India's tourism sector emerges from the shadows of the pandemic, the focus shifts towards not just recovery, but sustainable growth and innovation.

In the Interim Budget for 2024, the tourism sector was allocated INR2,449.62 million which was a positive change from the Union Budget of 2023, where the initial allocation for the Ministry of Tourism was INR2,400 million.⁷ With this budget, the Government of India has directed its focus towards development of tourism infrastructure, promotion of adventure tourism, eco-tourism, MICE tourism, religious tourism, development of iconic tourism

centres and domestic tourism. In addition to this, the Government is committed to ensuring a sustainable preservation of tourist sites and protected areas also visited by successive generations, to maximise the tourism sector's potential. One of its key segments, eco-tourism sector in India, is expected to grow at 15.7 per cent between 2019-27 to reach USD4.55 billion.³ While sustainable and experiential tourism has been gaining popularity beforehand, the pandemic was a catalyst for growth in these sub-sectors.

The imperative for a sustainable and responsible future in India's tourism sector is clear. With the country's vast natural and cultural wealth at stake, the transition towards sustainability is not only an environmental or ethical mandate but also a strategic economic decision. By focusing on sustainability, India can cultivate a tourism landscape with long-term viability and integrity of its assets.

3. "Tourism Industry in India - FDI, Investment, Market Share" Invest India, February 2023

4. "National Tourism Day", Drishti IAS, 25 January 2023

5. "India: foreign tourist arrivals", Statista, July 2023

6. "India's Push for Sustainable Tourism", Invest India, September 2023

7. "Interim Budget 2024 at a glance: FM allocates ₹2,500 crore for tourism-related infra development", CNBCTV18, February 2024



Sustainable tourism: An insight

02



2.1. Understanding sustainable tourism

Per the National Strategy for Sustainable Tourism released by Ministry of Tourism, Government of India, ' Sustainable Tourism is the tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.¹ Sustainable Tourism aims at maintaining economic and social benefits of tourism development while reducing or mitigating any negative impacts on the natural, historic, cultural, or social environment. This is achieved by balancing the needs of tourists with those of the destination.

Sustainability helps in protecting culture, natural resources, and social environments of the local people. It has a good impact on biodiversity preservation, which helps reduce poverty and achieve global development goals. The major goal is to increase the number of tourists while maintaining sustainability principles.

Sustainability is based on 3 dimensions or pillars:

A. Environmental sustainability

Sustainable tourism has a minimal impact on natural resources, the protected areas. It focuses on maintaining an ecological balance and conservation of natural resources to support health and well-being.

B. Socio-cultural sustainability

It involves respecting human rights and equal opportunities for all in society. It aims to create

inclusive societies, reduce inequality, and ensures long-term well-being for all people while preserving social cohesion and justice.

C. Economic sustainability

It aims to create long-term economic development while managing the socio-economic activities of all stakeholders. It benefits owners, employees, and neighbours.

Tourism has a significant impact on both natural and man-made environments, as well as on the health and well-being of host communities. The tourism industry has caused significant damage to fragile ecosystems and wildlife. It has put host communities under significant pressure and competition for limited resources, particularly land and water, and has become a major source of pollution at local and global levels. Tourism has also played a significant role in green-house gas emissions.

To reduce the negative impact of tourism, all forms of tourism in all types of destinations, including mass and niche tourist segments must be subject to the principles of sustainable tourism. The use of tourism as a means of benefiting local communities, the economic and social habitat, and raising awareness and support for the conservation of natural and cultural heritage is not only about managing the negative impacts of tourism, but also about making tourism more responsible and resilient.



1. "National Strategy for Sustainable Tourism", Ministry of Tourism, April 2022

2.2. Introduction to SDG goals and convergence with tourism

Tourism has been included as a target area in SDG Goals 8, 12 and 14, focusing on inclusive and sustainable economic growth, sustainable consumption and production (SCP) and the sustainable use of oceans and marine resources, respectively. However, tourism could play a direct or indirect role in achieving all of the Sustainable Development Goals (SDGs).

The following figure showcases how tourism can be converged with all the SDGs to promote sustainability:



Figure 1: SDG Goals and their convergence with tourism sector
Source: KPMG in India analysis

In the 2030 Agenda for Sustainable Development, SDG target 8.9, aims to 'devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products'. The Sustainable Development Goals 12.b, which aims at 'developing and implementing tools to monitor the impact of sustainable development on sustainable tourism that creates jobs and promotes local culture and products', also emphasises the importance of sustainable tourism. Tourism is also identified as one of the tools to 'by 2030, increase the economic benefits to small island developing states and least developed countries' as included in SDG target 14.7.

The Sustainable Development Goals (SDGs) aim to end poverty, protect the planet, and achieve prosperity for all by bringing together policymakers, academia, and all other relevant tourism stakeholders, and provide policy and strategic engagement guidelines. As tourism is the fastest growing sector of the global economy, examining the connections between tourism and the SDGs, is relevant to both developing and developed countries. By aligning tourism activities with the principles of sustainability and responsible management, the industry can contribute significantly to achieving the SDGs.



Sustainable tourism landscape

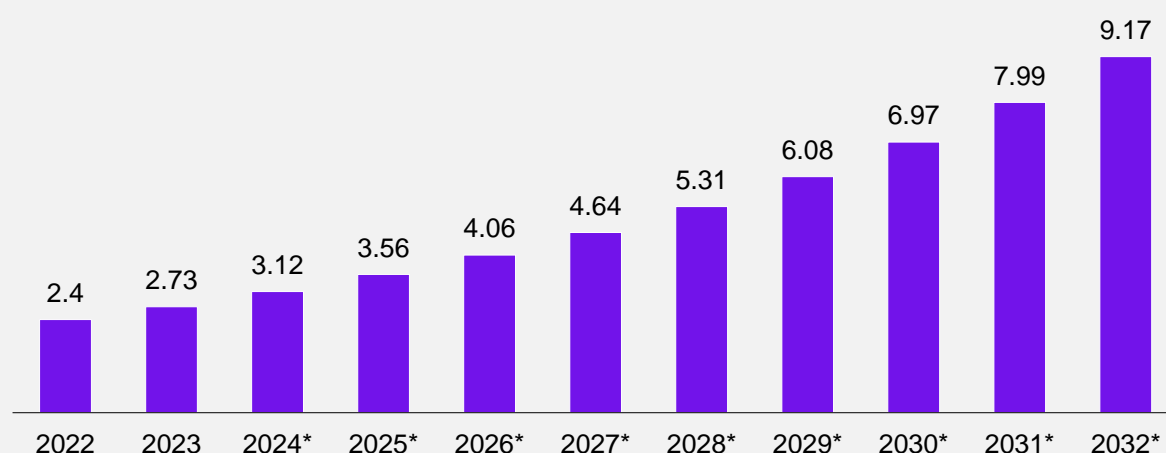
03



Tourism and the environment share a multi-faceted relationship. The global tourism industry has been used as a significant means to increase economic growth, alleviate poverty, provide employment opportunities, and improve food security. Many developing nations are geographically located in regions that are characterised by abundant natural resources, biological diversity, and cultural heritage

sites. Culturally historical sites attract huge numbers of local and international tourists. Extensive tourist activities in ecologically sensitive regions have been associated with negative impacts, majority of which are borne by the host communities. This creates a rising global need to develop a nurturing ecosystem for sustainable tourism.

Global Sustainable Tourism Market Size 2022-2032 (In USD Trillion) (*Projected)



Source: "Sustainable Tourism Market Size to Hit USD 9.17 Trillion By 2032", Precedence Research, December 2023

The global sustainable tourism market size was estimated at USD2.73 trillion in 2023 and is projected to hit around USD9.17 trillion by 2032, registering a CAGR of 14.40 per cent during the forecast period from 2023 to 2032.¹ In terms of regions, while North America holds the largest share in terms of revenues, the Asia-Pacific region is estimated to expand at the fastest pace.¹ This may be the result of undertaking policies and initiatives focused on environmental conservation, responsible tourism practices, and the development of eco-friendly infrastructure to minimise the environmental impact of tourism.³

Within the Asia Pacific region, India has presented itself as one of the driving geographies for sustainable tourism. The sustainable tourism market size in India was valued at USD26.01 million in 2022 and is anticipated to reach USD151.88 million by 2032, with a rapid CAGR of 19.3 per cent from 2022 to 2032.² Sustainable tourism is one of the economic sectors in India that has the potential to grow rapidly and contribute to the development of infrastructure in tourist destinations. In addition, the demand for sustainable tourism in India is increasing because it has the potential to leverage its success in the services sector and derive long-term development patterns.

1. "Sustainable Tourism Market Size to Hit USD 9.17 Trillion By 2032", Precedence Research, December 2023

2. "India Sustainable Tourism Market Size, Share & Trends – 2032, Future Market Insights, July 2022

3. "Interim Budget 2024 at a glance: FM allocates ₹2,500 crore for tourism-related infra development", CNBCTV18, February 2024

3.1. Balancing growth with sustainability

Sustainable tourism seeks to minimise its impact on the environment and local cultures while contributing positively to the future. However, transitioning to a sustainable tourism model presents a myriad of challenges, spanning environmental, economic, social, cultural, policy and regulatory dimensions. This creates a need to delve into understanding the role of tourism in sustainable development and seek a balance between growth and sustainability. It also presents an opportunity to identify the risks and challenges associated with the sector and mitigate them effectively.

The types of challenges associated with the sector can be classified under the following categories:

A. Environmental challenges

The very nature of tourism often puts a strain on natural resources, leading to over-tourism, habitat loss, increased pollution, and the depletion of natural habitats. The carbon footprint of international flights, the construction of tourism infrastructure in sensitive areas, and the waste generated by tourists are significant concerns.

B. Economic challenges

Sustainable tourism often requires significant upfront investment in eco-friendly infrastructure, renewable energy sources, and sustainable waste management practices. Small businesses and developing countries may find these initial costs prohibitive. Moreover, the reliance on tourism can make economies vulnerable to fluctuations in global travel trends, as vividly demonstrated by the COVID-19 pandemic.

C. Social and cultural challenges

While tourism can promote cultural exchange and understanding, it can also lead to the commodification of culture, where traditions are altered to suit tourist expectations, potentially eroding the authenticity of local customs and lifestyles. Additionally, the influx of tourists can strain local resources, leading to conflicts with local communities.

D. Policy and regulatory challenges

Implementing sustainable tourism practices requires coherent policies and regulations that balance environmental conservation, economic benefits, and social welfare. However, the lack of standardised definitions for 'sustainable tourism', inconsistent enforcement of regulations, and the challenge of coordinating across multiple governmental and international bodies complicate this task.

The concept of sustainable tourism in India explores innovative approaches, responsible practices, and eco-friendly initiatives to reshape its travel landscape. India has made considerable efforts to strike a balance between preservation of its natural and cultural heritage while providing enhanced visitor experiences. In India, sustainable tourism practices can help recognise opportunities in tourism-related activities that benefit local communities.

While several initiatives have been undertaken to promote sustainability in India, it is important to note that to achieve long-term sustainability, a suitable balance must be struck between environmental, economic and socio-cultural aspects of tourism development. This can be achieved through active participation of all relevant stakeholders including government leaders.



3.2. Indian policies and initiatives for sustainable tourism

The Ministry of Tourism, in 2022, developed a 'National Strategy for Sustainable Tourism' to ensure that the Indian tourism sector is fully sustainable through better resilience, inclusion, carbon neutrality, and resource efficiency while protecting environmental and cultural resources.

Additionally, it also developed the 'National Strategy for Ecotourism' in 2022 to create an enabling ecosystem. The strategy also envisaged ranking states based on internationally recognised parameters of ecotourism to promote competitiveness and mutual learning between its member states.

The proposed National Tourism Policy 2022, which calls for sustainable and responsible growth of the tourism sector in India, recognises that tourism is a global opportunity. The policy aims to make India a world leader in sustainable and responsible tourism, by reducing the adverse effects of tourism on social, environment, and economic aspects as much as possible while ensuring that these benefits are maximised. The Policy aims to act as a roadmap, to achieve a USD1 trillion contribution from the tourism sector to the nation's GDP by the year 2047.¹

The Ministry of Tourism also launched the 'Travel for LiFE' campaign in 2021. The campaign aims at encouraging India's 300 million domestic tourists to change their adverse behaviours and consumption of resources in a responsible way when travelling.

In addition to this, Swadesh Darshan Scheme 2.0 was rolled out with the aim of developing sustainable and responsible tourism destinations in

the country. The revamped scheme focuses on enhancing the contribution of tourism to local economies; creating jobs, including self-employment for local communities; improving young people's skills in tourism and hospitality with a view to further increase private sector investment in tourism and hospitality, as well as maintaining and promoting local, cultural and natural resources.

Further, the Sustainable Tourism for India Criteria and Indicators (STCI) guidelines have been launched to benchmark sustainable tourism practices for various tourism business enterprises, mainly accommodation units and tour operators, for STCI certification. The guidelines make it mandatory to ensure effective sustainable management, heritage protection, sharing social and economic benefits with the local community, conserving the environment, carrying capacity, and minimising negative impacts.

Moreover, policies promoting sustainability in tourism while preserving the richness of biodiversity and natural resources have been implemented by some states that depend on tourism, such as Uttarakhand, Sikkim, and Himachal Pradesh. The detailed analysis of sustainable policy initiatives undertaken by Indian states is in Annexure 1.

The Government of India has also implemented various initiatives to promote sustainable tourism and encourage responsible travel practices such as Atithi Devo Bhava, Dekho Apna Desh, Swachh Bharat Abhiyan, "Indian Responsible Tourism Certification" by Ministry of Tourism, etc.



1. "Tourism Industry in India - FDI, Investment, Market Share" Invest India, February 2023

Decoding existing sustainable practices in tourism

04



4.1. Global leading practices

Countries around the globe are pioneering innovative practices and policies to ensure that tourism not only thrives but does so responsibly and sustainably. It's imperative to analyse a few of these practices to understand how different nations are promoting sustainable tourism in their respective countries.

Table 1: Global leading practices to promote sustainability in tourism

S.No.	Theme	Country	Initiative
1	Sustainable Destination Management	New Zealand	Tiaki Promise - New Zealand introduced the Tiaki Promise, an initiative encouraging visitors to commit to care for the country's natural and cultural heritage during their stay. This pledge supports sustainable tourism by promoting respect for the environment, local communities, and Māori culture.
		Iceland	Inspired by Iceland - Iceland, facing the challenges of over-tourism, launched the 'Inspired by Iceland' campaign, focusing on responsible tourism. The campaign educates visitors on how to travel responsibly through Iceland, emphasising the importance of respecting nature, reducing adverse environmental impacts, and engaging with local communities respectfully.
		Peru	Community-based tourism - The community-based tourism initiatives in the Sacred Valley of Peru empower indigenous communities by involving them directly in hosting tourists, offering authentic cultural exchanges, and generating sustainable income.
2	Eco-Friendly Infrastructure and Transportation	Costa Rica	Certification for Sustainable Tourism (CST) - Costa Rica's CST programme is a world-renowned model for sustainable tourism. It rates businesses based on their adherence to sustainable practices, including energy use, water conservation, and community support.
		Netherlands	Bicycle Capital - The Netherlands sets the global standard for sustainable urban transportation, with its extensive bicycle infrastructure. Amsterdam showcases how cities can integrate cycling into daily life, significantly reducing reliance on cars and contributing to a reduction in urban carbon emissions.
3	Conservation and Wildlife Protection	Botswana	High-value, low-impact Tourism - Botswana has adopted a high-value, low-impact tourism model, prioritising conservation and community benefits. By limiting visitor numbers and focusing on high-quality, sustainable experiences, Botswana ensures that tourism directly contributes to wildlife conservation and community development.
		Rwanda	Gorilla Tourism - Rwanda's 'gorilla tourism' initiative is a prime example of conservation-driven tourism. The country has implemented strict guidelines to protect its mountain gorilla population, including limiting the number of visitors and mandating distances between humans and gorillas. Tourism revenues contribute significantly to the conservation efforts and the economic development of local communities.

S.No.	Theme	Country	Initiative
4	Enhancing Visitor Awareness and Education	Australia	Reef Teach - Australia's Great Barrier Reef is under threat from climate change and human activity. The 'Reef Teach' programme educates visitors about the reef's ecological importance and how to interact with it responsibly. This initiative is part of a broader effort to protect the reef and ensure its sustainability for future generations.
		Finland	Outdoors Finland - Finland promotes sustainable outdoor activities through its 'Outdoors Finland' campaign, educating tourists on how to enjoy the country's natural landscapes responsibly. The campaign covers principles such as the right to roam, emphasising respect for nature, wildlife, and local residents.
5	Policy Innovation and Collaboration	Indonesia	Bali Tourist Tax – In response to the pressing need for environmental conservation, improved infrastructure, and sustainable tourism practices, Bali, along with Indonesian tourism authorities, has introduced an entry tax for all foreign tourists. The tourist tax aims to address several critical issues while enhancing the overall visitor experience to the country.
		France	Green Tax on Air Travel - France introduced a green tax on air tickets to fund eco-friendly transportation projects, signaling a bold move to mitigate the environmental impact of air travel. The tax varies depending on the flight type and destination, encouraging travelers and airlines to consider more sustainable travel options.
		Singapore	Sustainable Tourism Master Plan - Singapore's Sustainable Tourism Master Plan outlines a comprehensive approach to developing a sustainable tourism sector. It includes initiatives to enhance sustainability in hotels, attractions, and events, and to foster a culture of sustainability among businesses and visitors.

By learning from these examples, India can adopt strategies to address its unique challenges and opportunities, paving the way for a more sustainable and inclusive future in global tourism.



4.2. Indian practices

While the public sector in India has undertaken various initiatives for development of sustainable tourism, the private sector including start-ups are working on innovative models to promote sustainable tourism in an efficient manner. With respect to it, a few businesses have focused on the following sustainability criteria:

Table 2: Indian practices to promote sustainable tourism

S.No.	Theme	Initiative
1	Environment Conservation and Rural Living	A few organisations are focusing on the concept of environment preservation, rural living, community-centered tourism, and lowering carbon footprints. This includes building-up platforms that enable travelers to understand rural life and the environment while supporting the economic well-being of local communities. The benefit of this model is environmental conservation by preserving local culture, traditions, installing solar panels and rainwater harvesting and wildlife habitats. The initiatives include using local materials and techniques to build resorts; promoting energy and water efficiency by installing solar panel and rainwater harvesting. and offering farm-to-table dining with organic produce, showcasing eco-friendly farming practices.
2	Engaging Local Communities	Certain companies are engaging nearby local communities in tourism related endeavours. The companies organise curated, end-to-end tours to offbeat villages, consisting of stays, transportation, locally prepared meals, activities, games, and cultural programmes. These programmes are designed to engage local communities, including women, self-help groups, artisans, and guides, offering guests an immersive experience of the cultural and heritage lifestyle found in villages.
3.	Birding and Wildlife Excursions	Companies involved in the tours and travel sector offer unique avenues for promoting sustainable tourism by immersing visitors while fostering appreciation for nature and biodiversity. By offering expert-led tours on sensitising and appreciation of local flora and fauna it can offer meaningful and sustainable experiences to both visitors and the environment, supporting the long-term preservation of natural habitats. It also covers areas like culture, textiles and crafts and archaeology.
4.	Trekking by promoting sustainability	At times, trekkers leave waste, making the environment unstable for flora and fauna. To tackle this issue, trek companies have started to ensure that the trash is taken back after the completion of the treks. However, some companies have developed innovative models like a dedicated team, along with enthusiastic trekkers that collect the trash to leave a clean environment. The dedicated teams' pick-up the waste and store it in iconic eco-bags.
5.	Ecotravel to create sustainable livelihoods	A few companies collaborated to focus on creating ecotravel to sustain livelihoods by fostering economic opportunities that promote environmental conservation and support local communities' cultures and traditions. Through ecotourism initiatives, communities can capitalise on their natural resources while preserving them for future generations. They work towards three target areas- economy, conservation, and development.

By adopting these practices, destinations and businesses can mitigate their negative environmental and social impacts and enhance the competitiveness and appeal of their offerings. The shift towards sustainability in tourism is not just a response to increasing regulatory and consumer pressures but a proactive approach to securing the future of the sector and the environment and communities it depends upon.

Future outlook and predictions

05



With considerable and consistent efforts made by majority stakeholders, the future of sustainable tourism in India will witness a striking balance between travel experiences and responsible practices. Lately, the focus of the government on raising awareness about environmental and cultural preservation has been paramount. While the need for sustainability in the tourism sector has been widely recognised, the implementation of

sustainable practices in the tourism sector still has a long way to go.

The following section discusses the challenges and opportunities associated with of the tourism industry's shift towards environment-friendly solutions, future of sustainable tourism in India, and emerging trends and technology.

5.1. Challenges and opportunities ahead

A. Managing over-tourism

With the resurgence of over-tourism post the pandemic, the government and other stakeholders are developing solutions that address negative impacts of tourism and transform it into something more sustainable.

Nations across the world are making efforts to ensure that they visualise such challenges as opportunities for a positive change in the tourism industry. For example, the "CO2 Zero STAY" programme developed by a Japanese hotel enterprise uses the carbon offset system. It calculates and visualises the amount of CO2 emissions generated by guests and invests an equivalent amount in carbon emissions reduction activities, thereby balancing the negative environmental impact to virtually zero.

Many hotel enterprises are also introducing eco-friendly amenities, viz., wooden and bamboo hairbrushes, combs, and toothbrushes, as well as shower caps and razors with reduced plastic content.

B. Tourist behaviour and sustainable tourism

While the government, and tourism service providers move towards sustainable practices and future, it is equally vital that tourists and travellers – the main drivers of tourism – change their attitudes and behaviours to ensure a sustainable future. In order to help tourists make sustainable travel choices, some global enterprises in the tourism sector offer discounts and financial incentives for motivation. Furthermore, organisations working towards the sustainable tourism development mission are making considerable efforts to provide relevant information and choices through multiple media platforms.

C. Mitigation of wastage

Wastage, especially food wastage, is one of the major contributors of environmentally harmful gas emissions. Tourism and hospitality industry produces a considerable amount of wastage, which calls for an urgency to address the issue.

While some enterprises and organisations are devising innovative methods for repurposing leftovers, including community food donations and optimising the use of the 'whole' ingredient, some have installed biodigesters to process organic waste. There is also an opportunity to undertake myriad approaches such as rethinking management of restaurant kitchens, training of service staff, using local, seasonal ingredients, and more.

D. Shortage of workforce

Sustainable tourism can be practiced effectively through a stable and a well-trained workforce. With the mass exit of workers during the pandemic and their apprehensions to re-join the tourism industry, there is an added increased pressure on the tourism sector, which is growing consistently. Further, shortage of experienced staff in the tourism and hospitality industry has resulted in the decline of service standards and an increase of operating costs. There is an urgent need to train and empower locals with appropriate skills and knowledge about the hospitality and service industry to ensure effective implementation of sustainable tourism strategies.

5.2. Future of sustainable tourism in India

The dawn of a new era in travel has placed sustainable tourism at the heart of India's tourism strategy, promising a future where travel is not just about exploring new destinations but doing so responsibly and sustainably. Several predictions emerge about how sustainable tourism will shape and be shaped by India's unique landscapes, cultural diversity, and economic dynamics.

A. A surge in eco-conscious travellers

The next decade will witness a significant rise in eco-conscious travellers, both domestic and international. Fueled by a growing awareness of environmental issues and a collective desire to preserve natural beauty, travellers will seek experiences that align with their values. India, with its rich biodiversity and natural heritage, has the potential become to a preferred destination for those looking to connect with the nature in a meaningful and sustainable way.

B. Pioneering sustainable infrastructure

India is poised to become a global leader in sustainable tourism infrastructure. Innovative and eco-friendly accommodations, such as solar-powered hotels, bamboo cottages, and zero-waste guesthouses, will become the norm rather than the exception. This shift will be supported by government incentives and policies that prioritise green building practices and sustainable management in the tourism sector.

C. Boost in rural and community-based tourism

The future will see a significant shift towards rural and community-based tourism, offering authentic experiences while benefiting local economies. This model will empower communities, preserve cultural heritage, and distribute tourism revenue more equitably. Experiences like farm stays, local crafts workshops, and cultural immersion programmes will become key attractions, drawing visitors keen on experiencing the 'real' India.

D. Focus on experiential travel

Real experiences that allow tourists to get immersed in the culture of their host country are more sought after. Participation in traditional activities, sampling

local cuisine, and interacting with indigenous communities are also part of this. These interactions are promoted and supported by the economy of the towns through sustainable tourism.

E. Emphasis on digital innovation for sustainability

Digital technology will play a crucial role in promoting sustainable tourism practices. From apps that recommend eco-friendly travel options to platforms that enable travellers to offset their carbon footprint, technology will make it easier for tourists to make responsible choices.

F. Expansion of green certifications and standards

Green certifications and sustainability standards will become more widespread and stringent, acting as benchmarks for tourists and incentives for businesses. These standards will cover a broad spectrum of practices, from energy efficiency and waste management to social equity and economic benefits for local communities. Establishments that meet these standards will be favoured by travellers, driving competition and innovation in sustainable practices.

G. Sustainable transport networks

The development of sustainable transport networks will be a key focus area. Electric vehicles, solar-powered boats, and bicycles will become popular modes of transport for tourists, supported by infrastructure such as charging stations and bike rental schemes. This shift will help reduce the carbon footprint associated with tourism and promote healthier, more immersive ways of exploring destinations.

The future of sustainable tourism in India is not just a vision but a necessity, shaped by global environmental challenges and a collective aspiration for a more responsible way of experiencing the world. By embracing sustainability, India's tourism sector can ensure that its treasures remain vibrant and accessible for future generations, setting a global example of how to balance growth with guardianship of the planet.

5.3. Emerging trends and technologies

In the past decade, the use of internet and social media has gone up drastically. Smart tourism has evolved as a result of technology's impact on many industries, including the tourism industry. The integration of digital technology has become a crucial element in the advancement of sustainable tourism, as it optimises destination marketing, streamlines the administration of tourism resources, and elevates the visitor experience.

A. Virtual Reality (VR) for virtual tourism

Virtual reality technologies are revolutionising the way we experience travel, offering immersive explorations of destinations from the comfort of one's home. These technologies are particularly impactful in sustainable tourism, allowing people to visit natural wonders and heritage sites without contributing to over-tourism or environmental degradation.

B. Augmented Reality (AR) for enhanced experiences

Augmented Reality (AR) is like VR, but it involves augmenting a person's surroundings rather than replacing them. It is cheaper than VR with users requiring only a smartphone with internet access. AR-powered mobile apps allow travellers to point their smartphones or tablets at landmarks, monuments, or attractions to access additional information, historical facts about the physical surroundings.

C. Artificial Intelligence (AI) for personalised experience

Artificial intelligence (AI) is transforming the tourism industry by revolutionising how businesses engage with travellers, personalise experiences, and optimise operations. AI-driven chatbots and virtual assistants provide instant customer support, answer queries, and assist with booking processes, enhancing customer service and satisfaction.

D. Blockchain for secure transactions

Blockchain technology, which provides safe and transparent transactions, is more popular in the tourism sector. By 2024, blockchain will likely become widely adopted for booking accommodation, flights, and travel services. Blockchain technology offers significant potential to transform the tourism industry by promoting trust, transparency, and efficiency, while also addressing challenges related to data security, and transactional integrity.

E. Renewable energy powered accommodations

The shift towards renewable energy sources is a game changer for sustainable tourism. Hotels and resorts are increasingly using solar, wind, and geothermal energy to power their operations, significantly reducing their carbon footprint.

F. Big data for destination management

Big data analytics play a crucial role in sustainable destination management, helping to monitor tourist flows, predict peak times, and distribute visitors more evenly across sites. Smart city initiatives in tourist destinations are utilising big data to optimise everything from traffic patterns to waste management, enhancing sustainability and visitor experiences.



Recommendations for promoting sustainable tourism

06



The studies and analysis carried out in previous sections of global leading practices helped consolidate key findings into actionable recommendations that India may consider in order to capitalise on the potential of sustainable tourism development and promote itself as a leading sustainable tourism destination.

The following elaborates on interventions for India to consider from the perspective of promoting sustainable tourism:

6.1. Community-level intervention

Although sustainable tourism programmes and strategies have great potential in accomplishing sustainable development goals, there is a substantial lack of on-the-ground community-level tools. A community-level intervention to guide the evolution and development of tourism in regional landscapes may aid in the effective implementation of the action plan for sustainable tourism development.

This may be achieved by a structured approach as illustrated below:

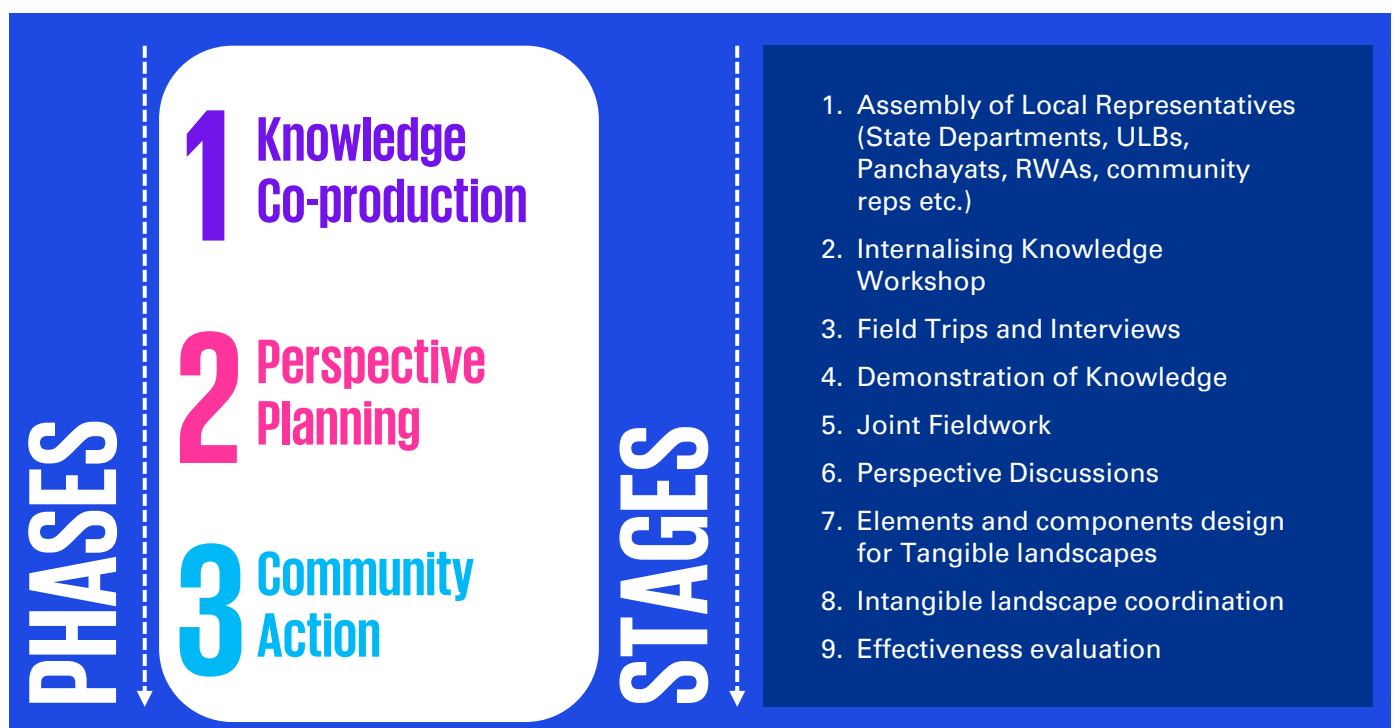


Figure 2: Approach for achieving community-level intervention for sustainability in tourism sector

Source: "How does the World Heritage Sustainable Tourism Programme guide the evolution of rural landscapes?", Landscape Research, Taylor & Francis Online, Jing Li, Chen Yang, Yichen Zhu & Feng Han, February 2023

6.2. Development of tax strategy for a sustainable future

For organisations and enterprises to be more sustainable and purposeful, there is a need to devise a systemic response to the growing urgency of environmental and cultural preservation. Introduction of environment-related taxes can aid in raising revenues for reform programmes that envision shifting taxes from labour and capital to optimal resource use and pollution control.

- a. **Sustainability tax:** The introduction of sustainability tax measures is recommended in all sectors to reduce GHG emissions, meet respective commitments on carbon neutrality, tackle climate change, raise revenues, and fund important policy objectives.
- b. **Environmental or green tax:** These include taxes on energy, transport, pollution, and

resources. Energy taxes are taxes on energy products and electricity used for transport, such as petrol, diesel, other fuel oils, natural gas, coal, and electricity used in heating. The government may consider extending imposition of green tax from vehicles to other tourism-related services to ensure conscious consumption of resources and reduction in pollution.

Revenues generated from such taxes could also support the transition of the nation's economy to a climate-neutral economy. A portion of the taxes thus collected may even be utilised in development of sustainable tourism initiatives, assets, and infrastructure.

6.3. Supplementary business – Farm tourism

Tourism may be presented to the local communities as a supplementary income source, thereby capturing their interest in participating in promotion of sustainable tourism practices. For example, agriculture-based tourism can offer farmers that are seeking additional and unconventional sources of income, an opportunity to offer sustainable tourism products such as:

- a. **Farm stays:** Farm-owners can provide basic accommodation for birdwatchers, wildlife tourists and nature enthusiasts. Further, skill development and training programmes offered to farmers can enable them to provide other hospitality-related services for an enhanced guest experience. Alternatively, they may work with local guides and tour operators to plan exciting visitor itineraries.
- b. **Farm visits/ vineyard tours:** Small farm owners can be encouraged to collaborate with each other to offer visitors unique farm experiences combined with nature-based tourism activities,

local cuisines, and guided tours. They can provide tours of their farm operations and provide access to nature viewing. They can also offer engaging activities such as fruit-picking, cooking workshops, textile weaving, honey picking and such activities. Further, they can set up farmers markets to sell fresh produce to visitors.

- c. **Farm-based attractions:** Several farm-based attractions may be developed including fishing ponds, bamboo rafting, cow-milking experience, village walks, gardening experience, traditional spa and massage services, traditional handicraft making, and such attractions.

Appropriate interventions may be considered by the government, such as developing a farm-stay policy, providing financial assistance to farmers to set up agritourism products, and assistance in marketing and promotion.

6.4. Leveraging the supply chain

Ensuring sustainability in tourism also involves preventing ‘economic leakage’ to the maximum extent possible. In other words, the benefits of tourist-related activities must remain within the community. This may be achieved by sourcing locally available products, collaborating with local enterprises such as bakers and food providers to ensure the tourists have options to indulge in authentic local cuisines and delicacies. Incorporation of local arts, crafts, and cultural groups including folk music and dance also ensures that the local cultural heritage is celebrated, while keeping the money within the community/regional economy.

6.5. Hubs, networks, and clusters

Developing hubs, networks, and clusters to provide sustainable tourism products based on their collaborative approach can offer mutual benefits including sales and marketing, capacity building, accessing funding mechanisms, etc. It is an important strategy that has been used successfully in the global tourism environment. However, the cluster formation is not a contractual collaboration and requires social capital, primarily mutual respect, and trust, in order to be sustainable. It would require the government to develop a deliberate strategy that offers small wins to the cluster members, thereby helping them develop trust and respect for each other.

6.6. Marketing and promotion

It is advised that marketing and promotion of the sustainable tourism practices continue to be led by government for an effective reach, impact, and authenticity confirmation of the target travellers. The critical first step for effective marketing involves researching and identifying characteristics of target market.

- a. The government can host fairs and festivals on a rotational basis in different states, showcasing the nation’s diverse ecological and cultural assets. These fairs and festivals could be used to attract visitors from all over the country and the world.
- b. The government may also organise nature tours or heritage walks for local stakeholders to encourage their participation in sustainable tourism activities.
- c. The government can also develop digital marketing campaigns to collaborate with local government bodies and small enterprises/communities/villages for promotion of sustainable tourism product offerings.



6.7. Knowledge management and capacity building

Sustainable tourism can be impactful with active participation of stakeholders at the grassroots level. To ensure that at the local level the support needed is received, it is advised to organise activities that help build capacity in business operations, particularly product development. The government may prepare a comprehensive plan to increase the capacity of the sustainable tourism industry in various regions, that may include:

- a. Access to tools and resources.
- b. Coaching and mentorship.
- c. Education and training.
- d. Regular workshops and feedbacks.

6.8. Destination-level support

The government may provide the necessary support to create an ideal environment for implementation of sustainable tourism strategies. Practical support that the government may consider providing includes the following:

- a. **Provisioning enabling infrastructure:** This includes development/ repair/ improvement of physical infrastructure such as roads, rail, water and/or air access, digital connectivity.
 - The government may also consider providing enterprises offering sustainable tourism products like certain waivers or reimbursements on registration and stamp duty based on a standardised criterion
 - Special permissions may be granted to develop suitable hospitality infrastructure in an otherwise restrictive environment.
- b. **Business support programmes/policies:** The government may provide the necessary support required by local stakeholders in navigating through the regulatory requirements to reduce barriers to potential development of sustainable tourism products.
 - Provide access to necessary resources, including funding and capacity building opportunities.
- c. **Collaborative support:** The government may organise appropriate information dissemination activities such as seminars and workshops to enable networking and clustering activities. Such programmes help to appreciate the value of collaborative action in sustainable tourism development and empower locals to provide a variety of tourism products to the travelers.



6.9. Mainstreaming sustainability

In the dynamic world of tourism, sustainability is no longer a luxury but a necessity. As the industry faces an increasing pressure to reduce its environmental footprint and contribute positively to local communities, integrating sustainable practices into daily operations becomes critical. This makes it imperative to outline actionable strategies and examples for tourism businesses striving to operationalise sustainability at every level of their activities.

a. Energy and water conservation

- Adopt renewable energy sources such as solar panels or wind turbines
- Implement energy-efficient lighting and HVAC systems
- Install low-flow faucets and toilets and encourage towel and linen reuse programmes to save water.

b. Sustainable supply chains

- Source food and materials from local, organic, and fair-trade suppliers
- Prioritise suppliers who demonstrate a commitment to environmental and social responsibility
- Reduce packaging waste by buying in bulk and choosing products with minimal packaging.

c. Waste reduction and management

- Minimise single-use plastics by offering alternatives like glass water bottles and bamboo toothbrushes
- Implement comprehensive recycling and composting programmes
- Educate guests and staff on reducing waste and proper waste sorting practices.

d. Eco-friendly transportation

- Promote the use of bicycles, electric vehicles, and walking paths within the destination
- Partner with eco-friendly transportation providers for guest transfers and tours
- Offer incentives for guests and staff who choose low-carbon travel options.

e. Responsible tourism experiences

- Design tours and activities that respect local cultures and natural habitats
- Provide authentic experiences that support local traditions and economies
- Educate guests on responsible behaviour in sensitive environments and cultural sites.

f. Community engagement and development

- Involve local communities in tourism planning and decision-making
- Support local entrepreneurship through microfinance and training programmes
- Invest a portion of profits back into community projects, such as education, health, and infrastructure.

g. Building sustainability into company culture

- Train staff on sustainability practices and the importance of their role in implementation
- Set clear sustainability goals and track progress
- Reward departments or individuals who make significant contributions to sustainability efforts.

By adopting these strategies, tourism operators can significantly reduce their ecological footprint, enhance the visitor experience, and contribute positively to the communities they operate in. The transition to sustainable practices requires commitment, creativity, and collaboration, but the benefits extend far beyond the immediate impact, ensuring the resilience and success of the tourism industry for generations to come.

Annexure 1: A comparative analysis of sustainable tourism initiatives undertaken by state governments under respective tourism policies

State	Sector focus	Infrastructure development	Other initiatives	Social inclusion and capacity building	Financial mechanisms
Uttar Pradesh¹	<ul style="list-style-type: none"> Responsible tourism Youth inclusion 	Incentives for energy audits, water harvesting, green buildings, and renewable energy.	<ul style="list-style-type: none"> Joint development and marketing of ecological destinations; compliance with environmental laws for eco-tourism and waste management Capital cost reimbursement for effluent/sewage treatment plants. 	Engagement with schools, colleges, and youth for sustainable tourism education.	<ul style="list-style-type: none"> Subsidies for audits, conservation practices, treatment plants, and sustainable certifications Energy efficiency incentives: Up to 75 per cent cost coverage for energy audits, capped at INR50,000 per audit Water conservation and green practices: Support for implementing water-saving and eco-friendly measures Effluent and sewerage treatment: 20 per cent cost coverage for treatment plants, up to INR20 lakh per plant Green building certification: 50 per cent fee coverage for certifications like IGBC/GRIHA/LEED, max INR10 lakh Sustainable tourism certification: Half of certification fees covered for GSTC, up to INR5 lakh Ecotourism society of India certifications: Full fee reimbursement for certifications, max INR1 lakh for two units annually.
Madhya Pradesh²	Eco-Tourism Pollution Control	Incentives for eco-certification and pollution control investment.	<ul style="list-style-type: none"> Support for eco-tourism development certified by Eco Tourism Society of India Subsidies for pollution control mechanisms 	Encouragement of responsible tourism practices.	<ul style="list-style-type: none"> Eco tourism certification subsidy: 100 per cent reimbursement for investment in obtaining eco certification (capped at INR1 lakh) Pollution control investment subsidy: 25 per cent subsidy for setting up pollution control mechanisms. (maximum subsidy of INR50 lakh, with a minimum investment of INR 10lakh required).
Goa³	<ul style="list-style-type: none"> Sustainable development Growth of local SMEs 	Infrastructure development with environmental sustainability, sustainable tourist mix, awareness campaigns.	Adoption of ecologically sustainable practices in nature-based tourism development.	Inclusive growth opportunities for local communities, civic pride campaigns.	Policies and programmes aimed at promoting sustainable tourism infrastructure.

1. "Tourism Policy 2022-2032", Government of Uttar Pradesh, November 2022

2. "Tourism Policy 2016", Government of Madhya Pradesh, 2016, Amended in 2019

3. "Goa Tourism Policy", Government of Goa, November 2020

Annexure A: A comparative analysis of sustainable tourism initiatives undertaken by state governments under respective tourism policies

State	Sector focus	Infrastructure development	Other initiatives	Social inclusion and capacity building	Financial mechanisms
Jammu and Kashmir ⁴	<ul style="list-style-type: none"> Energy Efficient Infrastructure 		Incentives for improving energy efficiency represent resource-saving measures.		Energy Audit Assistance: <ul style="list-style-type: none"> Star rating: Maximum assistance of 40 per cent Star rating: Maximum assistance of 50 per cent Star rating: Maximum assistance of 60 per cent Star rating: Maximum assistance of 70 per cent Star rating: Maximum assistance of 75 per cent (capped at INR 5 lakh per unit yearly).
Kerala ⁵	<ol style="list-style-type: none"> Agriculture Transportation Fisheries 	Infrastructure development resilient to climate extremes. Coastal protection measures and monitoring the impact of climate change on agriculture and natural resources.	<ul style="list-style-type: none"> Special responsibility towards the preservation and enhancement of biodiversity Focus on increasing agricultural productivity and intensification of cultivation for better resource use Encouragement of fruit tree cultivation for efficient land use. 	<ul style="list-style-type: none"> Programmes to reduce the debt burden of fish workers and ensure their physical, social, and economic security Strategy for cooperatives and collectives of fish workers to move into deep-sea fishing with government facilitation. 	<ul style="list-style-type: none"> Local bank's establishing to support financing of sustainable development projects Potential access to green project finance for the Silver Line Project due to its environmental benefits.
Arunachal Pradesh ⁶	<ol style="list-style-type: none"> Infrastructure Waste Management 	Developing all-weather roads with minimal environmental impact, eco-friendly transportation within and between cities, and maintaining trekking routes.	Preserving natural landscapes, replanting trees during road constructions, and maintaining ecological balance in development projects.	Promoting ecotourism to benefit local communities, awareness programmes for ecological conservation, and creating employment through eco-friendly services.	

4. "Jammu and Kashmir Tourism Policy", Government of Jammu and Kashmir, December 2020

5. "Fourteenth Five-Year Plan", Government of Kerala, 2022

6. "Integrated Paper on Developing a Comprehensive Tourism Policy For Arunachal Pradesh", Pahle India Foundation and Government of Arunachal Pradesh, December 2019

Annexure A: A comparative analysis of sustainable tourism initiatives undertaken by state governments under respective tourism policies

State	Sector focus	Infrastructure development	Other initiatives	Social inclusion and capacity building	Financial mechanisms
Karnataka ⁷	1. Heritage Infrastructure	Promoting balance in tourism development with the conservation of the environment and local culture.		Engaging communities in the development of tourism and promoting sustainable practices.	Financial Assistance per Tourism Project (50 per cent of capital cost for undertaking measure) up to INR1 lakh for water saving, pollution and clean energy projects
Tamil Nadu ⁸	1. Eco-Tourism 2. Sustainable Development	Promoting sustainable tourism with a focus on attracting high-value tourists rather than large volumes	Rainwater harvesting, renewable energy, waste management, green building certifications like GRIHA and IGBC, and smart solutions for water and wastewater management.	Engaging local communities in tourism, enhancing the natural bounty of Tamil Nadu, and creating employment and entrepreneurship opportunities.	<ul style="list-style-type: none"> • Up to 25 per cent of capital costs, with a ceiling of INR25 lakhs per project for sustainability initiatives. • Up to 100 per cent reimbursement for national certification (up to INR2 lakh) and international certification (up to INR10 lakh).



7. "Karnataka Tourism Policy 2020-26", Department of Tourism, Government of Karnataka, March 2020

8. "Tamil Nadu Tourism Policy 2023", Government of Tamil Nadu, September 2023



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