Government Of Goa
Department Of Tourism

Comments of the general public on the Interim submission on Module 3-Goa Tourism Master Plan are invited.

Comments may be sent on the e-mail ID: goatourismmasterplan@gmail.com on or before 4th September 2016
Preparation of Goa’s Tourism Master Plan and Policy
Interim Presentation - Tourism Master Plan for Goa excerpt

Department of Tourism, Government of Goa

24 August 2016
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1. This report has been prepared exclusively for the Department of Tourism (“Client”) based on the terms of the Request for Proposal dated 7 June 2013 issued by the Department of Tourism, KPMG Advisory Service Ltd.’s (“KPMG” or “we”) proposal for services dated 18 June 2013, the Work Order issued to KPMG dated 24 July 2014, and the consultancy contract dated 2 June 2015 (collectively ‘Contract’).
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4. This report is being submitted to the Department of Tourism, Govt. of Goa (‘DoT’) as part of the ‘Interim Presentation and report on Module 3: Development of Master Plan’-’3A’ for our engagement of assisting DoT in the “Preparation of the Tourism Master Plan and Policy for Goa”. It may be understood that certain elements of Module 3 would form a part of the submission for ‘Final Presentation and report on Module 3: Development of Master Plan’-’3B’ as specified in the next section. These elements would be incorporated based on the Government/Committee’s inputs based on the 3A submission.
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11. Our analysis is based on the prevailing market conditions and regulatory environment and any change may impact the outcome of our review.
Disclaimer

12. We have indicated in this report the source of the information presented. Unless otherwise indicated, we have undertaken no work to establish the reliability of those sources or to evidence independence of the relevant source.

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   - Products C&P
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<td>Quantitative Tourism Goals</td>
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<td></td>
<td>Development principles &amp;</td>
</tr>
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<td>guidelines</td>
</tr>
</tbody>
</table>
Main strategies for preparation of the Master Plan

- Build a unique and competitive positioning
- Diversify product portfolio and reduce dependence on the North Goa beach belt
- Improving type of tourist demand and reduce seasonality
- Build social and environmental sustainability

Generate a higher quality and more diversified offer for a HIGHER SPENDING TOURIST

- Create positive economic impact
- Improve quality across the tourism value chain
- Encourage SME businesses
- Support business development and attract investment

While safeguarding and improving tourism and general socio-economic interests of Goan stakeholders
<table>
<thead>
<tr>
<th>1. Development model</th>
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<tr>
<th>Development Strategies for Goa</th>
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<td>• Positioning</td>
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<td>• Products</td>
</tr>
<tr>
<td>• Markets</td>
</tr>
<tr>
<td>Quantitative Tourism Goals</td>
</tr>
<tr>
<td>Development principles &amp; guidelines</td>
</tr>
</tbody>
</table>
### Positioning matrix - Goa’s positioning vs type of visitor

<table>
<thead>
<tr>
<th></th>
<th>Current</th>
<th>Future</th>
<th>Marketing Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>International</td>
<td>Domestic</td>
<td>International</td>
</tr>
<tr>
<td>Coastal Tourism</td>
<td>⬤⬤ •</td>
<td>⬤⬤⬤</td>
<td>⬤⬤ •</td>
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<tr>
<td>Culture &amp; Heritage</td>
<td>⬤⬤ •</td>
<td>⬤⬤⬤</td>
<td>⬤⬤⬤</td>
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<tr>
<td>Nature Based Tourism</td>
<td>⬤⬤ •</td>
<td>⬤⬤⬤</td>
<td>⬤⬤ •</td>
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<tr>
<td>Leisure &amp; Entertainment</td>
<td>⬤⬤ •</td>
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<td>⬤⬤ •</td>
</tr>
</tbody>
</table>

**Optimization:***

1. **Coastal Tourism**
   - Strategy: Establish new strategy to attract high spending visitors.

2. **Culture & Heritage**
   - Current: Medium intensity for International, Low intensity for Domestic.
   - Future: High intensity for Domestic.
   - Strategy: Develop an innovative cultural offering, especially in the hinterlands.

3. **Nature Based Tourism**
   - Current: Medium intensity for International, Low intensity for Domestic.
   - Future: Medium intensity for Domestic.
   - Strategy: Use this product category mainly for diversification purpose.

4. **Leisure & Entertainment**
   - Future: Medium intensity for Domestic.
   - Strategy: Focus on families entertainment & activities portfolio.
### Geographical markets’ strategy

<table>
<thead>
<tr>
<th>Markets</th>
<th>Very Short Term</th>
<th>Short Term</th>
<th>Medium Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>Germany</td>
<td>X</td>
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<tr>
<td>France</td>
<td>X</td>
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<tr>
<td>Russia</td>
<td>X</td>
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<td></td>
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<tr>
<td>Australia</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>China</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Middle East</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domestic</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Very short term:** on going/ current markets  
**Short term:** 2 - 4 years  
**Medium term:** within 5 years

**Very Short term**
- Keep addressing domestic market & current nationalities but with a different proactive marketing approach
- Higher-spending segments within the coastal tourism product with a better and more diversified offer, including culture and nature tourism
- Tap into the markets for short breaks and holidays with new direct flights from the Middle East.

**Short term**
- Develop the cultural tourism offer of Goa to attract these nationalities. This would be the main motivation to visit India – and Goa as an extension
- Though most tourists would still stay on the coast, culture and nature-based tourism would be a main travel motivation for some tourists and complementary products for others.

**Medium term**
- Depending on identified new opportunities, further diversify markets such as Australia, through a multi-product destination, where cultural tourism would play a major differentiation role.
### Products / geographical market strategy: attractiveness levels

<table>
<thead>
<tr>
<th></th>
<th>Very short term markets (existing/current)</th>
<th>Short term markets</th>
<th>Mid term</th>
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<tbody>
<tr>
<td>Coastal Tourism</td>
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<tr>
<td>Culture &amp; Heritage</td>
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<tr>
<td>Nature – Based Tourism</td>
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<tr>
<td>Entertainment &amp; Leisure</td>
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- **High intensity**
- **Medium intensity**
- **Low intensity**

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Repositioning Goa as a multi-product destination

Proposed evolution of Goa as a Tourism Destination

• Evolve from a majorly Sun & Beach tourism destination to a Coastal tourism destination

• Develop a multi-product destination where Culture & Heritage will play a major role to attract both international and domestic tourists.

• More diversified and quality leisure & entertainment offer, mainly addressed for domestic tourists

• Nature-based tourism will be a focus product
## Development Strategies for Goa

### Qualitative Tourism Goals

<table>
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<th>Development model</th>
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<tr>
<td>Qualitative Tourism goals</td>
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<tr>
<td>• Positioning</td>
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<tr>
<td>• Products</td>
</tr>
<tr>
<td>• Markets</td>
</tr>
</tbody>
</table>

### Quantitative Tourism Goals

- Development principles & guidelines
Development principles and guidelines

- Elaborate a tourism development plan that is **acceptable to the stakeholders of Goa**, with an emphasis on enhanced quality and quantity of higher spending tourists, both domestic and foreign.

- Achieve this goal through a **strong diversification of the tourism product using all relevant and varied tourism assets, wherever they are located**.

- **Consider the entire State as a potential tourism development area**, which implies changing the past and current development pattern focused on the coast.

- **Conserve the natural and cultural assets deemed of high value by stakeholders** which act as major attractions for tourism, on the coastal stretches not yet developed and in the hinterlands.

- **Address existing and future development requirements highlighted in Modules 1 and 2** by creating physical plans that respond to that direction.

- **Phase tourism development** so that there are opportunities in the near term (2-5 years) and for a 10 year period from now.

- Take a broad look at sustainability, which **implies ensuring low scale tourism development in the hinterlands of the State** respectful not only with nature but also with the local culture, in line with the principles established in the Goa Regional Development Plan.

- **Provide a conceptual tourism planning model** that considers all these principles at State, Taluka and local specific levels.

- **Identify specific potential locations or locations’ profiles** for redevelopment, enhancement and/or new development.
Development guidelines for the coast and the hinterlands

### Protected Areas
- Nature sanctuaries in the hinterlands and the coast,
- Pristine beaches in certain talukas to be protected from high pressure in terms of possible development through high quality offerings

### Low - Medium Tourism Development
- Coastal areas: applies to parts of the coast, mainly in the upper North and mid/ extreme South, where no/ limited development is present.
- Hinterland areas (Ghats and Midlands): Applicable for developments in designated areas to create “clusters” of nature/ culture-based attractions/ activities
- Low density should also be paired with low rise buildings (Ground floor only or GF+1)

### Mass Tourism Development
- Is already present on the Goan coast in stretches, as well as in some urban areas
- “Mass” development could also be authorised in new designated places such as next to airport or areas that are not attractive for any development

### Table: Density models
- **Applicable to Hinterlands And Coastal Areas**
  - Untouched nature: Applies to designated fully protected areas, where no building is authorized and day access to visitor shall be regulated and monitored
  - Low density (5 - 20 units / per ha)
  - Medium density (21- 50 units/ ha)
- **In some Coastal/ Urban Areas/ near Airport**
  - High density (60+ units /ha)

### Area Development Density (units/ acres)

#### Untouched nature
- In the hinterlands, low-medium density development should be allowed in specific projects contributing to the creation of tourism clusters or singular projects. It is essential to allow for derogation of the Regional Plan specifications to enable socio-economic development of the hinterlands Talukas (Midlands and Ghats).

#### Low density (5 - 20 units / per ha)
- In present state highly developed areas

#### Medium density (21- 50 units/ ha)
- In some Coastal/ Urban Areas/ near Airport

#### High density (60+ units /ha)
- In present state highly developed areas
2. Master Plan

Development programs

Transversal infrastructure needs
28 programs have been defined to develop the Master plan

**Coastal**
- 6 programs
  - Regeneration/ Up gradation of beaches
  - Fishermen Market and F&B Court
  - Eco-beach Resort
  - High-end music venue paired with luxury lifestyle resort
  - Marinas
  - High-end lifestyle beach club paired with luxury lifestyle resort

**Culture & Heritage**
- 8 programs
  - Forts
  - Villages
  - Handicrafts
  - Cultural Events
  - Monuments (Temples, Churches, Museums & other Archeological Sites)
  - Old Goan Houses
  - Culinary
  - The Goa Multimedia Experience

**Nature-based**
- 6 programs
  - Nature Clusters (EF)
  - Nature Sanctuaries (EF)
  - Discovery River Cruises (EF)
  - Adventure & Sports Tourism
  - Agro tourism (spice farms and homestays and walks in agro farms)
  - Wellness destination centers

**Leisure & Entertainment**
- 5 programs
  - Family Entertainment District
  - Golf courses
  - Waterfront Promenades
  - Gaming District
  - Upgrading of Nightlife

**MICE & Weddings**
- 3 programs
  - Mass Events
  - Convention Centre
  - Weddings and Incentive Trips

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*Core products*, *Complementary products*, *Flagship programs*, *Quick wins*, EF = Eco-Friendly

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Understanding the programs’ structure

**Process:** In order to develop each of the core and complementary tourism products determined in Module 2, 28 specific programs have been identified in order to support them. These programs are of different nature:
- **Scope:** Short or broad
- **Investment:** requesting potentially low or high investment
- Flagship and quick win qualifications for some of the programs

| Flagship Programs | • Identified as such because of the potential for a high impact on the new vision for Goa tourism in terms of differentiated positioning, product diversification, product improvement and for the achievement of the attraction of higher spending tourists.  
• **13 flagship programs have been identified (almost 50% of the programs)**  
• As shown in the scheme presented in the former slide, there is at least one flagship program for each main tourism product category. |
| Quick Wins | • Identified as such because their implementation timeframe is estimated to be up to 3 years and they can be showcased immediately based on changes in Goa tourism through implementation of the Master Plan.  
• This will encourage the local stakeholders to undertake other programs and initiatives as they will see tangible results.  
• **There are 16 quick win programs (almost 60% of all the programs)**  
• As shown in the scheme presented in the former slide, there are at least 2 quick win programs for each main tourism product category. |
## Rationale for the Master Plan development phasing

<table>
<thead>
<tr>
<th><strong>Short term</strong> (within 3 years)</th>
<th>Programs and projects that can be implemented in limited time because they refer to:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Existing products, facilities and services that need to be improved – e.g. improvement of existing beaches (pilot projects) and relocation of casinos</td>
</tr>
<tr>
<td></td>
<td>• The establishment of “soft” schemes, based on commercial labels, standards, training, etc. to recognize, enhance and promote already existing products, facilities and/or services - for example, certification labels for accommodation in old Goan houses, homestays, or culinary labels; creation of new events, permanent cleaning and maintenance service for key attractions</td>
</tr>
<tr>
<td></td>
<td>• New development which imply light construction or building that can be implemented in less than 3 years – such as fishermen markets and F&amp;B courts</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Medium term (3 - 5 years)</strong></th>
<th>Programs and projects that need 3 to 5 years to be implemented because they refer to:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• New developments implying complex building or time for planning, design and construction</td>
</tr>
<tr>
<td></td>
<td>• Complex programs because they need consensus between many stakeholders and/or have a broad scope – like full completion of beach regeneration program, not only of a pilot project that can be implemented in the short term.</td>
</tr>
</tbody>
</table>

| **Long term** (5 years/above) | All programs that have not been able to be implemented within the 5 years timeframe, whatever the reasons. |

Though programs will need different timeframe for full implementation, it is recommended that all programs get started at the same time, at least in terms of planning and consultation with relevant stakeholders; however “quick wins” should be given maximum priority in terms of efforts, resources and real implementation.
2. Master Plan

Development programs (DP) –

- DP – Coastal Tourism
- DP - Culture & Heritage Tourism
- DP - Nature Tourism
- DP - Leisure & Entertainment
- DP - MICE & Weddings

Transversal infrastructure needs
Coastal Tourism Programs

| 2 | **Fishermen Market and F&B Court** | Brittona, Chapora Bay, Siridao and Mobor |
| 3 | **High-end music venue paired with luxury lifestyle resort** | At a suitable location in Baga, Calangute or Candolim |
| 4 | **High-end lifestyle beach club paired with luxury lifestyle resort** | At a suitable location in Arambol, Vagator or Anjuna; and Cavelossim or Palolem |
| 5 | **Eco-beach (Resort)** | Pure Eco-beach: Galgibag, Morjim turtle stretch and Talpona. Resort: Agonda, Patnem, Palolem (part), Morjim, Mandrem and Querim |
| 6 | **Marinas** | Nauxi, Chicalim and Brittona |

⭐ Flagship programs ⚡ Quick Wins
Coastal Tourism Programs

1. **Regeneration/ Up gradation of Beaches**
   - Raising the quality, safety and sanitation level of the most popular beaches in Goa
   - Implement across Goa's beaches.
   - Pilot Projects in N. Goa and S. Goa

2. **Fishermen Market and F&B Court**
   - Goa’s number one source of premium fresh seafood and local cuisine
Coastal Tourism Programs

3. High-end music venue paired with luxury lifestyle resort

- Envisioned to be one of the most exclusive and biggest clubs in India
- At a suitable location in one of the beaches specified

4. High-end lifestyle beach club paired with luxury lifestyle resort

- Featuring a blend of music, art and fashion with day and night atmosphere
- At a suitable location in one of the beaches specified
Coastal Tourism Programs

5 Eco-beach (Resort)

- Pure Eco-beach and Eco-Resorts
- Built in harmony with nature and hence with minor impact on environment

6 Marinas

- Understood as an anchor of a mixed-use development which includes accommodation, retail, F&B and entertainment premises
## Coastal Tourism Programs - Summary

<table>
<thead>
<tr>
<th>Program</th>
<th>Implementation</th>
<th>Financing model</th>
<th>Operations model</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flagship program</td>
<td>‘Quick win’</td>
<td>Short term</td>
<td>Medium term</td>
</tr>
<tr>
<td>1- Regeneration/ Up gradation of Beaches</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>2- Fishermen Market and F&amp;B Court</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>3- High-end music venue paired with luxury lifestyle resort</td>
<td>✔</td>
<td>✔</td>
<td>Support</td>
</tr>
<tr>
<td>4- High-end lifestyle beach club paired with luxury lifestyle resort</td>
<td>✔</td>
<td>Support</td>
<td>Lead</td>
</tr>
<tr>
<td>5- Eco-beach (Resort)</td>
<td>✔</td>
<td>Support</td>
<td>Lead</td>
</tr>
<tr>
<td>6- Marinas</td>
<td>✔</td>
<td>✔</td>
<td>Support</td>
</tr>
</tbody>
</table>

**Short term**: within 3 years  
**Medium term**: 3 - 5 years  
**Long term**: 5 years/ above
2. Master Plan

- Development programs (DP) – Coastal Tourism
- DP - Culture & Heritage Tourism
- DP - Nature Tourism
- DP - Leisure & Entertainment
- DP - MICE & Weddings
- Transversal infrastructure needs
Culture & Heritage Programs

1. **Forts**
   Reis Magos, Tiracol, Chapora, Aguada and Cabo de Rama

2. **Monuments**
   Key Pilot projects: Old Goa Churches, Mary Immaculate Church, Mangueshi & Shantadurga Temples, Tambdi Surla, Pansaimol rock carvings, Heritage site at Selaulim

3. **Villages (arrive and walk)**
   Siolim, Sangolda, Divar, Chorao, Pomburpa, Aldona, Chandor

4. **Old Goan Houses**
   Aldona, Siolim and Colvale, Chandor, Curtorim, Raia and Sanguem

5. **Culinary**
   Across Goa

6. **Cultural Events**
   Kala Academy and state monuments wherever possible

7. **The Goa Multimedia Experience**
   Old Goa Church Complex/ environs or Kala Academy

8. **Handicrafts**
   Sale of products via GHRSSIDC (Aparant) in dense tourist locations & online channels

Flagship programs
Quick Wins
• Providing a memorable visitor journey experience.
• Enhancement with complementary offer such as F&B, retail and events

• Key pilot projects
• Showcase 3 categories: ‘must see assets’; ‘nice to see assets’ and ‘assets for specialized tourism’, in order to prioritize budgets and actions to be undertaken
Culture & Heritage Programs

3. Villages (arrive and walk)

- Highlighting authentic features while providing multi-experience (walking, discovery, Food & Beverage, interpretation centres and storytelling, etc.)

4. Old Goan Houses

- Designed to stir the imagination and allow history lovers to stay in some of the most historic buildings
• Goan food and drinks: reviving traditional recipe's paired with modern creation

• Featuring a blend of music, art and fashion with day and night atmosphere

Culture & Heritage Programs - Summary

5 Culinary

- Riverside Promenade
- Beach Shacks
- Restaurants e.g. Spice Goa
- Agro farms e.g. Yogi Farms
- Spice Farms e.g. Sahakari spice farm
- Farmers markets

6 Cultural Events

- Culinary tourism in homestays, house visits and spice villages/ farms
- Old Goa
- Panaji
- Featuring a blend of music, art and fashion with day and night atmosphere
Culture & Heritage Programs - Summary

• A showcase of all the experiences available to tourists visiting Goa
• The Goa Multimedia Experience is a show that narrates the history of Goa. It can be part of a kind of interactive interpretation centre aimed to raise awareness of Goa’s assets (culture, nature, lifestyle, villages, food, drinks, UNESCO World Heritage Sites, Among Others).
• It is the “entry gate” to Goa or, a showcase of all the experience offering available to tourists. For this reason, it should be ideally located in the capital or close to one of the most visited cultural attractions in the state.
## Culture & Heritage Programs - Summary

<table>
<thead>
<tr>
<th>Program</th>
<th>Flagship program</th>
<th>‘Quick win’</th>
<th>Short term</th>
<th>Medium term</th>
<th>Long term</th>
<th>Implementation</th>
<th>Financing model</th>
<th>Operations model</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.- Forts</td>
<td>✔</td>
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<td>✔</td>
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<td></td>
<td>Lead</td>
<td>Private</td>
<td>Lead</td>
</tr>
<tr>
<td>2.- Monuments</td>
<td>✔</td>
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<td>✔</td>
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<td></td>
<td>Lead</td>
<td>-</td>
<td>Lead</td>
</tr>
<tr>
<td>3.- Villages (arrive and walk)</td>
<td>✔</td>
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<td>✔</td>
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<td></td>
<td>PPP</td>
<td>Support</td>
</tr>
<tr>
<td>4.- Old Goan Houses</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>PPP</td>
<td>Support</td>
</tr>
<tr>
<td>5.- Culinary</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td>Support</td>
<td>Lead</td>
<td>Support</td>
</tr>
<tr>
<td>6.- Cultural Events</td>
<td></td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>PPP</td>
<td>PPP</td>
</tr>
<tr>
<td>7.- The Goa Multimedia Experience</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td>Lead</td>
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<tr>
<td>8.- Handicrafts</td>
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<td>✔</td>
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<td></td>
<td>PPP</td>
<td>Support</td>
</tr>
</tbody>
</table>

**Short term:** within 3 years  
**Medium term:** 3 - 5 years  
**Long term:** 5 years/ above
2. **Master Plan**

<table>
<thead>
<tr>
<th>Development programs (DP) – Coastal Tourism</th>
</tr>
</thead>
<tbody>
<tr>
<td>DP - Culture &amp; Heritage Tourism</td>
</tr>
<tr>
<td>DP - Nature Tourism</td>
</tr>
<tr>
<td>DP - Leisure &amp; Entertainment</td>
</tr>
<tr>
<td>DP - MICE &amp; Weddings</td>
</tr>
</tbody>
</table>

**Transversal infrastructure needs**
Nature Based Programs

1. **Discovery River Cruises (EF)**
   Rivers Mandovi, Zuari and Chapora; Cumbarjua Canal

2. **Agro tourism (spice farms/ homestays and agro farms)**
   In the areas of Molem, Ponda outskirts, Netravali and Quepem

3. **Nature Sanctuaries (EF)**
   Bondla, Bhagvan Mahaveer, Netravali, Cotigao, Molem National Park and Dr. Salim Ali Bird Sanctuary

4. **‘Slow Movement’ Wellness Centres**
   Divar; Also mainly around the hinterland under certified eco-friendly accommodation

5. **Nature Clusters (EF)**
   4 main clusters: one in each of the hinterland talukas: Satari, Dharbandora, Sanguem and Canacona

6. **Adventure & Sports Tourism**
   Bogmalo – Grande Island and its environs; Baga, Majorda for water based sports; Dudhsagar Base Camp and Vagueri hills
   Base Camp

Flagship programs

Quick Wins
Nature Based Programs

1. Discovery River Cruises (EF)

- Discovering the destination in a relaxed manner on a vessel taking in the lush greens, calm waters and varied fauna

2. Agro tourism (spice farms/ homestays and agro farms)

- Offering the real life of the Goans to tourists eager to discover their culture
Nature Based Programs

3 Nature Sanctuaries (EF)

- Based around local fauna/flora with an orientation towards environmental promotion
- Bondla Zoo; Bhagvan Mahaveer, Netravali, Cotigao, and Dr. Salim Ali Bird Sanctuaries; Molem National Park

4 ‘Slow Movement’ Wellness Centres

- Goa as the “Center for the Slow Movement” Culture
- Focus on a new development in the hinterlands
- Divar; and in Eastern Goa
Nature Based Programs

5 Nature Clusters (EF)

• Nature-based hubs located in the hinterland comprising nature and culture assets, man-made attractions and accommodation
• 4 main clusters: one in each of the hinterland talukas

6 Adventure & Sports Tourism

• Focus on safety and standardization
### Nature Based Programs – Summary

<table>
<thead>
<tr>
<th>Program</th>
<th>Implementation</th>
<th>Financing model</th>
<th>Operations model</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Flagship program</td>
<td>‘Quick win’</td>
<td>Short term</td>
</tr>
<tr>
<td>1.- Discovery River Cruises (EF)</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>2.- Agrotourism (Spice farms and homestays and walks in agro farms)</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>3.- Nature Sanctuaries (EF)</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>4.- ‘Slow Movement’ Wellness Centres</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>5.- Nature Cluster (EF)</td>
<td></td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>6.- Adventure &amp; Sports Tourism</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
</tbody>
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**Short term:** within 3 years  
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2. Master Plan

Development programs (DP) – Coastal Tourism

DP - Culture & Heritage Tourism
DP - Nature Tourism
DP - Leisure & Entertainment
DP - MICE & Weddings

Transversal infrastructure needs
Leisure & Entertainment Programs

1. **Waterfront Promenades**
   - *Panaji, Colva, Chapora, Old Goa and Mayem Lake*

2. **Family Entertainment District (inclusive of Themed Park)**
   - *In the vicinity of the proposed Mopa airport*

3. **Gaming District**
   - *Organised gaming clusters along with shifting of the offshore casinos to the Chapora or Chicalim Bay*

4. **Up gradation of Nightlife**
   - *Across Goa.*
   - *Key Pilot projects: mainly for beaches from Vagator to Sinquerim*

5. **Golf Courses**
   - *1 in the hinterland/ 1 in vicinity of Mopa airport subject to space availability and Govt. norms*
**Leisure & Entertainment Programs**

1. **Waterfront Promenades**

2. **Family Entertainment District (inclusive of Themed Park)**

- A leisure & entertainment hub for the family offering a themed park, F&B, shopping and accommodation
Leisure & Entertainment Programs

3 Gaming District

- Pernem
- Bardez
- Mapusa
- Panaji
- Tiswadi
- Mormugao
- North Goa
- Chapora Bay
- Chicalim Bay

4 Upgradation of Nightlife Across Goa.

- Vagator beach
- Sinquerim beach
- To be conducted across Goa. Key Pilot projects: mainly for beaches from Vagator to Sinquerim

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Leisure & Entertainment Programs

- The aim of the programme is not to turn Goa into a renowned golf destination, but to offer complementary golf activities to tourists that demand it as a secondary activity.

- 1 in the hinterland/1 in vicinity of Mopa airport subject to space availability and Govt. norms

- Construction of a golf course with due regard to the Goan landscape and environs.

- Facilities and requirements - 30 ha / 9-hole golf course
Leisure & Entertainment Programs - summary

<table>
<thead>
<tr>
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<td>1.- Waterfront Promenades</td>
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</tr>
<tr>
<td>2.- Family Entertainment District (inclusive of Themed Park)</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>3.- Gaming District</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>4.- Up gradation of Nightlife</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>5.- Golf Courses</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
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</table>

**Short term:** within 3 years  
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**Long term:** 5 years/above
### Master Plan

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</tbody>
</table>

**Transversal infrastructure needs**
MICE & Weddings Programs

1. Convention Centre + Ancillary facilities (including Hotels)
   Vicinity of proposed Mopa airport (Pernem) or Panaji in Dona Paula area – subject to availability of land

2. Mass Events
   Shyama Prasad Indoor Stadium, Vagator and Candolim

3. Weddings and Incentive Trips
   All across Goan Hotels and ancillary facilities at the Convention Centre
• A world-class Convention Centre in the vicinity of the proposed Mopa airport to launch Goa as a competitive destination for MICE tourism

• Mass events should focus on the low season and be supportive to Goa’s tourism positioning

Convention Centre + Ancillary facilities (including Hotels)

Mass Events
MICE & Weddings Programs

- Goa by virtue of its lush green forests and fields, as well as its picturesque beaches is a key venue for destination weddings.

- Goa is already a popular wedding destination, which can multiply its potential, also for incentive trips destination with its range of tourism assets.

- Dissemination of information on key modalities and procedures including public performance license, sound restrictions, Visa formalities and wedding registration would facilitate development of this product.
MICE & Weddings Programs - summary

<table>
<thead>
<tr>
<th>Program</th>
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<th>‘Quick win’</th>
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<th>Public</th>
<th>Private</th>
<th>Public</th>
<th>Private</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.- Convention Centre + Ancillary facilities (including Hotels)</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td>PPP</td>
<td>PPP</td>
<td>PPP</td>
<td>PPP</td>
</tr>
<tr>
<td>2.- Mass Events</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td>PPP</td>
<td>PPP</td>
<td>PPP</td>
<td>PPP</td>
</tr>
<tr>
<td>3.- Weddings and Incentive Trips</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td>Support</td>
<td>Lead</td>
<td>-</td>
<td>Lead</td>
</tr>
</tbody>
</table>

**Short term:** within 3 years  
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2. Master Plan

Development programs

Transversal infrastructure needs
Today Goa offers a good range of urban and coastal accommodation establishments, covering the whole spectrum of categories and different types of needs: urban business/leisure hotel; small and large coastal resorts; boutique hotels; etc.

However, the hinterlands do not provide this level and variety of accommodation, with some rare exceptions.

Therefore it is important to:

- Further diversify the tourism accommodation offer throughout Goa (see next slide)
- Develop upscale and eco-friendly accommodation if a requirement is identified in some coastal areas
- Develop accommodation in the hinterlands: at a low and medium-density scale in selected places of interest; encourage homestays in different types of accommodation

Though Goa enjoys some of the well established international standard luxury hotels, the current classification system is not consistent with international standards resulting in:

- Imbalanced competition within the same official category of hotels - Some tourism accommodation not meeting the international standards of a category would actually fall by one or sometimes even 2 category levels
- Lackluster tourism image regarding quality of the destination negatively impacting its capacity to attract higher spending tourists.

A reclassification based on the star-rating system is needed, which has to be paired with an uplifting of the general standards of the Goa tourism accommodation
## Accommodation Strategy: Diversification of the tourism experience

### Accommodation typologies applicable to Goa’s Tourism Value Proposition

<table>
<thead>
<tr>
<th>Hotel</th>
<th>Destination Resort</th>
<th>Low and medium density developments</th>
<th>Other Accommodation</th>
</tr>
</thead>
</table>
| • >200 keys  
• Rooms and suites  
• Provides a focused experience around one signature amenity or anchor attribute  
• Beach club as a potential facility | • 100 - 200 keys  
• Rooms, suites and villas  
• Large number of captive guest attractions and activities  
• Real Estate component/development (optional)  
• Nautical activities  
• Direct access to the beach | • <100 keys on the coast  
• Up to 50 keys in the hinterlands  
• Rooms, suites and villas  
• Boutique hotels  
• Located in special interest and preserved / protected areas  
• Nature and culture activities  
• Sustainability focus | • Surf camps  
• Camp sites  
• Vacation cities  
• Beachside shacks combined with accommodation facilities  
• Low impact accommodation |

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Accommodation strategy - standards and classifications

High service disparities in accommodation infrastructure
• Serviceability levels among accommodation options within the same star/ DoT hotel categories
• Traveler expectations and actual services offered, especially in bookings made through online media
• Basic traveler requirements not serviced at lower category establishments

Key solutions proposed
• Re-establishing standards for each classification (e.g. A, B, C, D and Heritage) in order to make them relatable to globally recognized classification standards (e.g. European Hotelstars Union, World Hotel Rating, AAA Diamond Ratings or Forbes Travel Guide ratings)
• Ensuring an enforcement mechanism for adherence to required service standards

Benefits of re-establishing standards and monitoring
• Higher customer satisfaction, promoting repeat visits and positive word of mouth dissemination in the industry
• Higher value realization for travelers at accommodation establishments
Connectivity Strategy - International, National and Intra State

<table>
<thead>
<tr>
<th>Modes of Transport</th>
<th>Air</th>
<th>Water</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The Mopa airport is expected to have a passenger handling capacity of 13.1 million per annum by 2036</td>
<td>• The cruise terminal at the Mormugao Port Trust is currently attracting international cruise travelers</td>
<td></td>
</tr>
<tr>
<td>• Goa is well connected to major states across the country. Better connectivity to major cities besides Mumbai and Delhi is the need of the hour</td>
<td>• Domestic tourists can also be attracted through short duration inter state cruises</td>
<td></td>
</tr>
<tr>
<td>• The Regional Connectivity programme of the Govt. of India would also boost tourist arrivals from across India</td>
<td>• Intra state connectivity can be developed through infrastructure improvements/ development at the Tiracol Fort, Chapora river basin, Fort Aguada, Dona Paula / Panaji - Old Goa, Mormugao Port, Colva Beach, Mobor Beach/ River Sal/ Cabo De Ram, River Talpona/ Polem jetties</td>
<td></td>
</tr>
<tr>
<td>• Goa currently has direct flight connectivity to destinations in the Middle East which forms a hub for international arrivals.</td>
<td>• These jetties can support Ferry Services, Catamaran Ferry, Sea Buses, Speed Boats and Seaplanes to ferry tourists</td>
<td></td>
</tr>
<tr>
<td>• The proposed airport is expected to be capable of handling B777 and A380R aircraft types, making it accessible practically from a significant number of international tourist markets via non stop flights.</td>
<td>• Seaplane services can function as feeder points for high end tourists to the coastal regions with fast road connectivity to the interiors of Goa, increasing accessibility</td>
<td></td>
</tr>
<tr>
<td>• Charters are an important mode of transport preferred by international travelers. However, greater emphasis needs to be laid on attracting Free Independent Travelers (FITs)</td>
<td><strong>Source:</strong> RFQ Document for the Mopa Greenfield airport project</td>
<td></td>
</tr>
</tbody>
</table>
Connectivity Strategy - International, National and Intra State

Modes of Transport

**Rail**
- Konkan and South Western Railways with a Single Track Broad Gauge railway line are operational in Goa.
- Trains run at speeds up to 120 km/h (design – 160km/h)
- The Konkan Railway railway track when doubled could accommodate 120 (both passenger and goods) trains/day.
- These works are expected to be completed in five years and would boost connectivity to North and South India.
- The proposed track doubling for the South Western Railway would also facilitate connectivity to East India.

**Road**
- Goa is connected to the rest of India through two major highways – NH17 and NH4A
- Phased augmentation through four and six laning of highway stretches would boost road connectivity greatly
- An important link road of 30 m R/w is proposed to link NH4A (near Corlim) and NH17 (at Agassaim).
- NH-4A is planned to be extended in two directions promoting hinterland connectivity
- Private vehicles, Taxis, Buses, Rent-a-bike/car are key forms of transport
### Connectivity Strategy - Tourism signage system

#### Modes of Transport

<table>
<thead>
<tr>
<th>Current situation and needs</th>
<th>Way forward</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Today, the state has a limited general signage and indeed a tourism signage system.</td>
<td>• In this context, a clear, visible, permanent, consistent sign posting shall be adopted and developed.</td>
</tr>
<tr>
<td>• A good and consistent sign posting system is extremely relevant in any tourist destination but even more for those like Goa, which is and can be visited mostly by road, thanks to short distances between attractions.</td>
<td>• Besides regulations established at State and Taluka levels for general signage, a specific tourism sign posting system should be reinforced and developed.</td>
</tr>
<tr>
<td>• Many of the new products that have been proposed for the Master Plan invite tourists to enjoy them best through circuits, mostly by road, though some also using river transportation.</td>
<td>• <strong>Tourism signs and symbols should express their meaning in the most universal and simple language possible</strong> using international standards, as mentioned by the UNWTO to facilitate tourism experience, especially from international visitors.</td>
</tr>
<tr>
<td>•</td>
<td>• Tourism signs and symbols are mainly found at:</td>
</tr>
<tr>
<td></td>
<td>• Ports of entry/exit such as airports, seaports, bus and railways stations and terminals</td>
</tr>
<tr>
<td></td>
<td>• Buildings, roads, streets, paths and trails</td>
</tr>
<tr>
<td></td>
<td>• Maps, orientations diagrams, guidebooks, tourism pamphlets; and now more and more on Internet portals and web sites</td>
</tr>
</tbody>
</table>
Connectivity Strategy - tourism circuits infrastructure needs - Transversal

Transversal/combined circuits:

- River Cruise
- Train route from N to S and W to E
- Bicycle tracks near rivers/ in Natural Parks
- Trekking routes
- Beach circuits:
  - Forts
  - Old Town
  - Turtle nesting
  - View Point
- Hinterland circuits:
  - Spice Farms
  - Wildlife
  - Waterfalls
  - River Cruise
  - Wellness in nature
- Panaji Circuit
  - Mandovi River Cruise
  - Bird Sanctuary
  - Old Goa
- Best of Goa

Facilitating Infrastructure:

- Interpretation Centres
- Information Kiosks and marketing material
- Signage's with asset details
- Local guides and interpreters
- Transportation Hubs
- Circuit Itineraries, including travel options (possibly posted on the website)
- Multiple accommodation types for various target travellers
- Food and drinking water facilities
- Town/ City/ Village walking routes
- Quality, safety and hygiene programs for food safety/ water sports/ adventure sports
- Garbage management
Infrastructure Strategy - preparing Human Capital to adapt to and make the most of the Tourism Master Plan opportunities

Creation of Human Resources Service Centres with 3 main functions:

- Awareness programs
- Training programs
- Support programs (Companies Incubator)

- HR Service Centres provide skills and support to local people so that they can create new businesses, or improve existing ones, by providing awareness, training and support programs
- Service Centers link the demand from local population to create Micro and Small Enterprises and the supply which take into consideration the gaps that exist in the rural tourism sector and the employment in Goa, especially in the hinterlands.
- The implementation of Services centers for Human Resources Development will:
  - Increase awareness of the importance of the development and at the same time competitiveness of tourism in Goa as a whole destination, as well as in the different coastal and hinterland tourism destinations.
  - Increase the professionalism and know-how of the local stakeholders and public administrations for the development of a marketable higher-end and sustainable tourism in Goa. Increase the quality of services by providing skilled and educated human resources
  - Increase the opportunities for local residents to take advantage of the development of tourism in Goa, especially those located in the Hinterlands.
  - Provide support to entrepreneurs, professional improvement and creation of employment

Human Resources Service Centers (HRSC) will be the center point to provide the training, support and awareness required to develop human capacity for Goa.

HRSCs will aim to train and upskill current and future professionals composing the tourism workforce.

There should be at least 3 Centers to the serve the Northern Coast, the Southern Coast and the Hinterlands.

A website, on-line courses and an employment database, should also link all the centers and further facilitate human resource development.
### Infrastructure Strategy - focus on some key transversal services

| Travel organization / booking infrastructure | • Assistance to smaller tourist trade ventures towards investing in network infrastructure or subscribing to travel portals given the rising demand for online travel bookings  
• Awareness programs towards ensuring service levels difference between expected and actual service quality from offline partners is minimal |
| --- | --- |
| Tour guides | • Certification courses for tour guides to meet industry requirements pan Goa, including taxi drivers who could serve as tour guides  
• Identification of trainers to give specialized short time courses at villages / Panchayats having key culture and heritage or nature tourism sites/ projects  
• Formalization and stringent implementation in terms of certified tourist guides providing services to travelers |
| Food & Beverage facilities | • Majority of the restaurants are concentrated in few cities owing to high tourist footfalls  
• The demand needed to support quality restaurants is low in other potential tourist places in Goa  
• Ramping up hinterland infrastructure and introduction of tourism products subject to feasibility would then be supported by F&B facilities. |
| Tourist Taxi Services | • Regulation of the tourist taxi services in the state is important to intra state connectivity  
• Govt. measures to install fare meters with printers along with Global Positioning System (GPS) devices is a key measure required for seamless transport across the state  
• The meters combined with the rate card issued by the Govt. Dept. would help in formalizing taxi services |
### Infrastructure Strategy - Support Infrastructure

<table>
<thead>
<tr>
<th>Water supply &amp; Waste management</th>
<th>Electricity Supply</th>
<th>Healthcare</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Goa has statewide coverage in drinking water</td>
<td>• The energy requirement of the tourism establishments is around 210 mn kWh annually which is 7% of the total energy consumed in the state</td>
<td>• Goa has a sound health infrastructure in place to cater to the health needs of locals and tourists alike in terms of the Doctor population and Bed population ratios</td>
</tr>
<tr>
<td>• Water demand from tourism is expected to almost double to 15 MCMY (Million cubic meter per year) by 2030</td>
<td>• Shortfall of 100MW during peak hours adversely effects the tourism industry through frequent power cuts</td>
<td>• Increased number of emergency healthcare and first aid services would be required at tourism hotspots with tourism growth</td>
</tr>
<tr>
<td>• Tourism currently contributes to 8.4% of solid waste produced in the state</td>
<td>• 24X7 electricity should be provided at key tourism assets and establishments in the long term</td>
<td></td>
</tr>
<tr>
<td>• Poor waste management is seen to be causing a strain on the tourism sector</td>
<td>• In the short term means should be undertaken to provide 24X7 supply at tourist accommodation, flagship products and tourism hotspots</td>
<td></td>
</tr>
<tr>
<td>• Utilization of new age waste water disposal methods are required, especially in mass tourism areas</td>
<td>• Works have been initiated for a 100-tons per day ultra-modern municipal solid waste management facility at Saligao which is expected to handle waste from the North Goa coastal belt</td>
<td></td>
</tr>
<tr>
<td>• Tourism currently contributes to 8.4% of solid waste produced in the state</td>
<td>• The Govt. plans to have a similar plant in South and Central Goa for garbage management by 2017</td>
<td></td>
</tr>
</tbody>
</table>

Source: Public Works Department ; T E R I. 2012, Directions, Innovation and Strategies for Sustainable Development in Goa, National Health Mission
### 3. Commercialization and Promotion (C&P)

<table>
<thead>
<tr>
<th>Brand enhancement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination C&amp;P</td>
</tr>
<tr>
<td>Products C&amp;P</td>
</tr>
</tbody>
</table>
Enhancing the Goa brand: Adding a Baseline and Storytelling

Context & objective

- Recently a new brand was designed for Goa, development of which included a new logo and application manual.
- As per international practice of many world destinations, there is an opportunity to further enhance the brand by adding a tag or baseline to the logo.
- Moreover, a “story” or short text of Goa as a tourist destination could be written in order to describe the aspirational Goa tourism.
- Finally, the brand could be still enhanced by adapting Goa’s defined colors to promotion materials, physical assets, merchandising, handicraft, etc. to be used as “symbols” that people will remember and associate with Goa’s destination personality.

Baseline

- A baseline, aims to highlight and summarize under a single word, group of words or sentence, the essence of what Goa can offer to tourists.
- While it is advisable to keep the same logo for a long term (10 years or more), baseline can be changed and adapted every 5 years, if needed, to reflect what Goa wants to enhance as a destination.

Storytelling

- A short text written by a Goan journalist or writer to synthetize the essence of Goa’s experience, could take Goa’s history as a guideline and introduce other concepts. This story/text, should be used as in introduction to all online and offline materials used to describe and differentiate the whole tourism destination.
- Though visuals are important, if a story is character and narrative driven it has a better chance at striking an emotional chord with an audience. If a destination can tell a story that resonates emotionally with an audience, they can overcome just about anything.
- The strategic importance of storytelling for a tourism destination:
  - Stories are hard for others to copy
  - Good stories can result in lots of word-of-mouth
  - Myths can be created
  - Fascinating stories create curiosity
  - Stories as catalyst of destination development
Enhancing the new Goa brand: baseline and Story telling

Baseline

- A baseline, aims to highlight and summarize under a single word, group of words or sentence, the essence of what Goa can offer to tourists. While it is advisable to keep the same logo for a long term (10 years or more), baseline can be changed and adapted every 5 years, if needed, to reflect what Goa wants to enhance as a destination.
- Some examples of relevant domestic and international tourism destinations have been shown below
- Implementation guidelines:
  - The baseline should serve to highlight the desired evolution of Goa from a pure beach destination towards an integrated coastal, cultural and nature-based destination, likely to attract higher spending tourists from both India and abroad. The tag or baseline should put forward the unique “blend” of natural and historic features, all present and enjoyable within short distances.
  - Creative part to be developed by a specialized creative agency, under the guidance of and validation by Goa tourism stakeholders, from the public and private sectors.
<table>
<thead>
<tr>
<th>3.</th>
<th>Commercialization and Promotion (C&amp;P)</th>
<th>Brand enhancement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Destination Commercialization and Promotion</td>
<td>Products C&amp;P</td>
</tr>
</tbody>
</table>
Promotion strategy - Goa’s expenditure in marketing & promotion

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>International Arrivals</td>
<td>Domestic Arrivals</td>
<td>Total</td>
<td>International Marketing Budget*</td>
<td>Domestic Marketing Budget*</td>
<td>Others*</td>
<td>Total in INR (*)</td>
<td>Total in US$</td>
<td></td>
</tr>
<tr>
<td></td>
<td>527,569 (13%)</td>
<td>3,530,657 (87%)</td>
<td>4,058,226</td>
<td>13.70 (34%)</td>
<td>24.30 (61%)</td>
<td>2.00 (5%)</td>
<td>40.00</td>
<td>611,515</td>
<td></td>
</tr>
<tr>
<td></td>
<td>541,480 (10%)</td>
<td>4,756,422 (90%)</td>
<td>5,297,902</td>
<td>14.04 (34%)</td>
<td>24.91 (61%)</td>
<td>2.05 (5%)</td>
<td>41.00</td>
<td>733,800</td>
<td></td>
</tr>
</tbody>
</table>

**Detailed Marketing Budget FY 15/16**

* Amount in ‘000,000 (INR)

- **Tourism Marketing budgets Goa**
  - The overall budget has been increased by 21% from 2014 to 2015, in line with total arrivals growth.
  - Marketing budget is today oriented to promotion of domestic tourism (61% of total expenditures), as this market represents 90% of total arrivals.
### Promotion strategy - Benchmark on marketing expenditure

<table>
<thead>
<tr>
<th>Country Type</th>
<th>Foreign Arrivals per year</th>
<th>Average Marketing Budget (USD)</th>
<th>Average marketing spend per arrival</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large Destinations</td>
<td>+ 50 M</td>
<td>50 M</td>
<td>1 USD or less</td>
</tr>
<tr>
<td>Medium Destinations</td>
<td>+20 M</td>
<td>40 M</td>
<td>3-4 USD</td>
</tr>
<tr>
<td>Small Destinations</td>
<td>+2 M</td>
<td>15 M</td>
<td>5-6 USD</td>
</tr>
<tr>
<td>Less Destinations</td>
<td>1 or less M</td>
<td>5 M</td>
<td>7-8 USD</td>
</tr>
<tr>
<td>Goa</td>
<td>0.5 M</td>
<td>0.57 M</td>
<td>0.4 USD</td>
</tr>
</tbody>
</table>

### Key takeaways

- **Countries with large amounts of international tourists arrivals spend around 1 dollar per arrival though they have the highest budgets.**

- **In second-tier volume tourist destinations, the less tourist arrivals, the more average spending per arrival reaching around 8 USD.**

- **Goa needs to invest a larger amount in international budget in order to get closer to the average spending. Nowadays it seems to be far away from the standards: 0.4 US$ versus 5 to 8 US$ per arrival in comparable sample of destinations.**

- **On the other hand, it is true that this highest spending needs to be mitigated because India’s marketing budget would to a certain extent cover this need, as it promotes the country as a whole.**
## SWOT on Goa’s Marketing Promotion & Communication

<table>
<thead>
<tr>
<th><strong>Strengths</strong></th>
<th><strong>Weaknesses</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• High brand recognition among domestic tourism</td>
<td>• Brand positioning not clear; some of the brand attributes are not conducive to attracting high-end tourists</td>
</tr>
<tr>
<td>• High brand recognition among international tourism for Sun &amp; Beach, Nightlife and “Living Life to the Fullest” way of life</td>
<td>• Low marketing budget</td>
</tr>
<tr>
<td>• Recent brand change</td>
<td></td>
</tr>
<tr>
<td>• Land of contrasts with wide range of offerings to be promoted, easily reachable due to short distances</td>
<td></td>
</tr>
<tr>
<td>• Website oriented to direct sales of specific products and availability of destination app</td>
<td></td>
</tr>
<tr>
<td>• Marketing expenditure addressed to both domestic and international markets</td>
<td></td>
</tr>
<tr>
<td>• Availability of Multiple Tourist Products &amp; Resources to Develop Goa into a Top Destination</td>
<td>• Several Indian states are running aggressive international marketing campaigns and have potential to compete with Goa (Kerala is today the strongest competitor using aggressive and focused marketing &amp; promotion techniques)</td>
</tr>
<tr>
<td>• Promote tourist arrivals from markets with high number of arrivals in India but low for Goa (USA, Canada)</td>
<td>• Visibility in trade shows is increasing significantly for several Indian states</td>
</tr>
<tr>
<td>• Attract tourists by launching a segmented communication by travel motivation and nationality</td>
<td></td>
</tr>
<tr>
<td>• Develop a strategy for marketing and communication by product</td>
<td></td>
</tr>
<tr>
<td>• Take profit of social media marketing to increase awareness and personalization without relevant additional spending</td>
<td></td>
</tr>
</tbody>
</table>
Marketing Destination Goa as a whole: Proposed approach

Customer intelligence & Campaigns
Storage visitors information to launch segmented campaigns and increase repeat tourists’ rate

B2B, Events & Congress
It is important to share with intermediaries the new strategy, which could be channeled through a newly established Convention Bureau for all MICE products

Social Media
Today Goa already has a good presence on Facebook, Twitter or Instagram

Press, Publicity & Programmatic Marketing
A step forward needs to be done to develop a segmented and efficient communication through traditional channels and modern one

Smart Tourism Destination
Integration of all technologies into an Omni–channel Platform for a seamless digital experience for the end user throughout the whole customer journey

Website
Good information platform but there’s a long path to deal with according to relational service, real time information and transactional agreements

Mobile APP
Explore the possibilities that bring new mobile apps such as, geolocation, beacons or customized contents. It is a good mean to extract valuable information about the customer

Key physical Contact Points
Implement advantage of key contact points in order to understand, relation and inform our visitors
Marketing GOA Destination - Website

It is the destination image on the internet and a commercialization tool. This website has to be dynamic, interactive and efficient for visitors but also useful for tourism stakeholders. The website should be structured by a tourism product menu, gathering all services that support the visitor motivations.

Frequent actions to be done

- **Update** the website periodically to maintain the quality of the information and use the latest technologies
- Propose a page with recent news of the tourism industry and of the country on the website
- Create a **restricted area** for professionals and press
- The website should be adapted to the different key customer segments (language and design preferences)
- The website should be available from all main searching engines optimization (SEO) (Google, Bing, etc)
- Visitor **reports and statistics** should be extracted each month of the website in order to verify the frequency of visits and the visitor characteristics

Website of the future

The web 2.0 is a channel of communication between all stakeholders and new formats and tools will arrive to enhance and improve the experiences. It will be a key factor of success to keep marketing updated on all opportunities coming from innovative technologies.

**Digital Travel Planner**

**Photo sharing, interactive maps, wikis, widgets…**

**Forum where customers share its experience**

**Real stories of real customers (Malaysia web)**
# Marketing GOA Destination - Website Evaluation

## Information Services

<table>
<thead>
<tr>
<th>Area</th>
<th>Detail</th>
<th>Mark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals</td>
<td>How to get here</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Visa</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Customs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Currency</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Time Zone</td>
<td></td>
</tr>
<tr>
<td>Local Trips</td>
<td>Routes, Schedules &amp; Price (Taxi, Train, Bus)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Car rental &amp; Guides information</td>
<td></td>
</tr>
<tr>
<td>Real Time</td>
<td>Prices and value of goods</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cultural tips</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Weather predictions &amp; Quality of air / water</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Traffic condition</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Season factors</td>
<td></td>
</tr>
<tr>
<td>Brand</td>
<td>USP / Claim</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Story telling</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mission, vision &amp; objectives</td>
<td></td>
</tr>
<tr>
<td>Where to go</td>
<td>Regions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cities / Villages</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Main Sights</td>
<td></td>
</tr>
<tr>
<td>What to do</td>
<td>Cultural Tourism</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Business &amp; MICE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sport Tourism</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Leisure &amp; Entertainment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Nautical Tourism</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Eco Tourism</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Others</td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td>Hotels, Hostels, Camping, Cruise, Spa</td>
<td></td>
</tr>
<tr>
<td>Special features</td>
<td>Disabled info, families, sustainable tourism</td>
<td></td>
</tr>
</tbody>
</table>

## Area

<table>
<thead>
<tr>
<th>Detail</th>
<th>Mark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation</td>
<td></td>
</tr>
<tr>
<td>Museums</td>
<td></td>
</tr>
<tr>
<td>Rentals (car, bicycle, boats, ...)</td>
<td></td>
</tr>
<tr>
<td>Events and Shows</td>
<td></td>
</tr>
<tr>
<td>Restaurant bookings</td>
<td></td>
</tr>
<tr>
<td>Transport tickets</td>
<td></td>
</tr>
<tr>
<td>Souvenirs, maps, guides...</td>
<td></td>
</tr>
<tr>
<td>Activities &amp; Tours</td>
<td></td>
</tr>
<tr>
<td>Packages</td>
<td></td>
</tr>
<tr>
<td>Accommodation and activities package</td>
<td></td>
</tr>
</tbody>
</table>

## Transaction Services

- Products (at destination)
  - Accommodation
  - Museums
  - Rentals (car, bicycle, boats, ...)
  - Events and Shows
  - Restaurant bookings
  - Transport tickets
  - Souvenirs, maps, guides...
  - Activities & Tours
  - Packages
  - Accommodation and activities package

## Relation Services

- Newsletter
- Social Media
- Personal Area
- APP info
- Newsletters
- Facebook
- Phone Number
- Direct Chat
- FAQ

### Marketing GOA Destination – Website Evaluation

- Goa’s website is focused on providing basic information to visitors. There’s a low developed section that offers packages and accommodation to customers.
- Relational services such as social media connection, newsletter or visitors blog are still to develop.
- There’s also a progress area in Real Time Services.
Mobile applications offers Goa a new relationship channel with customers and stakeholders. This new channel includes a wide range of new possibilities to interact with customers, build awareness, improve loyalty and strongly complement their whole experience.

App technology solutions

- Real time information such as social media, tourist information (traffic, events), advertising or reminders
- Vehicle tracking (bus, metro, taxi, shared cars)
- NFC tags and QR codes to access information about nearby points of interest
- Tourist Complaints Management System
- Multi-languages travel guide app which also offers available packages
- Proximity marketing with beacons (special discounts, upgrades or cross selling)
- Customized digital contents (self segmentation)

Current Goa’s app has a great potential to develop. It seems to be an information platform with some useful services like checking availability in hotels or calling for a cab. It should move towards a digital and relational platform in order to improve customer experience and loyalty. Moreover this platform should enable gathering valuable information from visitors.
Today tourism information offices should not be only attended by physical persons but greatly complemented by virtual and interactive “offices”. It is important to place them in strategic points such as airports / train stations / ports, famous attractions or hotel areas. These virtual information points become also strong cross selling marketing tools throughout the destination.

**Strategic methodology**

- **Sign Location**
  - By knowing the locations of your signs, you will also be able to consider in the environment of the sign
  - Identify your main audience and understanding exactly who you are creating content for. Measure how long will be your audience in front of the sign
  - Do they need information to guide them? To educate them (tech them about products / services)? To entertain them?

- **Target**
  - Identify your main audience and understanding exactly who you are creating content for.
  - Measure how long will be your audience in front of the sign
  - Do they need information to guide them? To educate them (tech them about products / services)? To entertain them?

- **Needs**
  - Do they need information to guide them? To educate them (tech them about products / services)? To entertain them?
  - What do we want our visitors to do? (follow our social media, buy a product, visit a sight). Call-to-actions should be include in our content

- **Mission**
  - What do we want our visitors to do? (follow our social media, buy a product, visit a sight). Call-to-actions should be include in our content
  - Content change frequency, who creates the content, brand voice / message guidelines…
Press & Publicity: Activities should be developed to communicate the tourism offer, the products and the brands to targeted audiences. In the case of Goa, it seems important to focus on the accessibility of information to journalist and also to create advertisements available to the corporate sector. Moreover, it is increasingly important and cost-efficient to use more online materials and campaigns rather than offline and physical promotion materials and campaigns. Though, offline promotion cannot be eluded.

Specific actions

- Press trips
- Media database (gathering information on international travel writers and journalists)
- Resource library including photos, brand imagery, video clips of local attractions, photo CD
- Press clipping
- Targeting on specialized press and journals to place effective advertising
- Newsletter to international travel writers and journalists
- Strategy for celebrities, key opinion leaders or travel bloggers (strong influencers)
**Programmatic Marketing**: target what types of audience you wish to show your advertising to. Which can encompass segments across demographics such as age, gender, social standing, to geographic in certain areas of the country. You can also limit the ads to times of day and frequency, decide which publishers you want your ads to show on. **This way you are only paying for highly effective ads, delivered to the right people at the right time**

**Strategic methodology**

- **DSP selection**
  - The path to programmatic begins with the choice of your demand-side-platform (DSP). Good DSP must be transparent in their capabilities and data sources

- **Data partners selection**
  - A data partner should be able to clearly articulate the value of their data and how it will assist you in targeting your campaign to achieve your KPIs
  - Upon setting the KPIs for any individual campaign, you should then work backwards from your goals to see which measurements align
  - Programmatic is all about delivering the right message to the right audience at the right time. Creativity is capital

- **Metrics**
  - The programmatic opportunity can only be fully exploited if there is a strong post-campaign reporting and analytics system

- **Creativity**

- **Post – Buy analysis**

**Example**

1. **Target**: Germans between 25 – 35
2. **Product**: Nightlife and Beach & Sun
3. **Promotion**: 20% less on early booking

**Example 1.**

- **Target**: Germans between 25 – 35
- **Product**: Nightlife and Beach & Sun
- **Promotion**: 20% less on early booking

- **Filter**: target with travel & leisure cookies last month
- **KPIs**: click on ad, visit main page, booking
Design of relevant marketing collateral is essential to support the selling and promotion of products. A specialized team should be in charge of building this type of materials and a strategic promotion plan must be designed to give vitality through the different promotion channels.

**Types of collaterals**

- Sales brochures and other printed product information
- Visual aids used in sales presentations
- Web content (photos, 360° views, video)
- Sales scripts
- Demonstration scripts
- Product data sheets
- Product white papers
- Promotional pictures

*Kerala’s collaterals in website and social media*
Social media is the one of the key areas for destination marketing managers. GTDC should actively encourage user content about destination and integrate it in its own channels. One of the most important factors that we take into account when planning a trip is friends recommendations. Social media is plenty of these recommendations and that’s why Trip Advisor is one of the decisive stakeholders of our time.

How to measure success in social media

- Number of visitors viewing user-generated content (UGC) on the website
- Number of visitors viewing UGC on third party sites
- Number of identified blogs that support the destination
- Blog activity
- Tags / Hashtags
- Volume of tags that include optimization engines keywords with presence in websites from priority markets
- Specific statistics, such as “Trending topic” or number of “retweet”

Some inspiration facts

- 52% of people use social media for summer vacation inspiration
- 74% of people use social media while on vacation
- 48% of people use it to share videos and pictures
- 92% of consumers express that they credit the recommendations of their friends’ travel and tourism
- 59% of consumers express that they have social travel as a necessity in their travel choices
- 60% of people using social media to plan their vacations were women
- 30% of those using social media to plan their vacations were identified as booking business
- 85% of leisure travelers use their smartphone while abroad
Kerala is the destination that spends more effort on social media means. However Goa is already performing well in this field.

<table>
<thead>
<tr>
<th>Social Media Platform</th>
<th>Sri Lanka</th>
<th>Bali</th>
<th>Ibiza</th>
<th>Kerala</th>
<th>Maldives</th>
<th>Mauritius</th>
<th>Thailand</th>
<th>Goa</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook (page likes)</td>
<td>6.033</td>
<td>903</td>
<td>23.420</td>
<td>1.284.078</td>
<td>NA</td>
<td>38.235</td>
<td>39.146</td>
<td>615.468</td>
</tr>
<tr>
<td>Twitter (followers)</td>
<td>1.149</td>
<td>11.200</td>
<td>14.700</td>
<td>70.300</td>
<td>12.600</td>
<td>15.400</td>
<td>70.400</td>
<td>30.200</td>
</tr>
<tr>
<td>Instagram (followers)</td>
<td>59.300</td>
<td>4.000</td>
<td>13.900</td>
<td>57.900</td>
<td>42.400</td>
<td>NA</td>
<td>52.700</td>
<td>20.300</td>
</tr>
<tr>
<td>Youtube (channel subscriber)</td>
<td>529</td>
<td>NA</td>
<td>52</td>
<td>18.440</td>
<td>NA</td>
<td>NA</td>
<td>2.045</td>
<td>618</td>
</tr>
</tbody>
</table>
Marketing GOA Destination - B2B, Events & Congresses

To develop an international tourism marketing and representation network is crucial for Goa’s performance for the next years. It will market and promote Goa tourism at the market origin, inform the customers and intermediaries on their travel possibilities and the tourism offer in Goa.

Objectives

- Definition of office/representation model: according to budget and market priorities, the first step is to define the kind of office model among the following options: BTB satellite offices, Tourism Trade Representative, Destination Marketing or PR Company.
- Selection of source markets for offices: identification of priority markets and specific locations (cities), where to settle the defined marketing office.
- Assessment and revision of network map every 4 years, in order to optimize efforts and resources, redefine the priorities and office models, according to trends, market’s changes and competitiveness situation.

B2B stakeholders

- Tour Operators & Travel Agencies (TUI, Thomas Cook)
- OTAs (Booking, Expedia, Airbnb)
- Convention Bureau
- Travel websites, Blogs & Travel Influencers (Trip Advisor, Lonely Planet)
- MICE (specialized travel agencies, MICE organizers, Big Companies)
- B2B stakeholders
Identify actions which will be dedicated to further research and target Goa’s loyal customers and repeat visitation, to improve destination experience. It is also important to encourage and facilitate active recommendation of our destination, even on behalf of non-repeat visitors. This project will provide inputs to the Marketing Intelligence System and it is based on the idea of being a software user.

**Objectives**

- Develop a customer relationship management in order to save financial resources and enhance the loyal visitors’ profitability rather than constantly targeting new visitors and new target markets.
- Manage the CRM via an IT system which would collect and organize the different data collected about loyal customers.
- Manage the platform to distribute personalized information to customers such as newsletter, special offers to instate a link with them and stimulate repeat business.
- The CRM system should monitor the use and enjoyment of the new products.

**Customer journey analysis**

Customer journey analysis allows us to identify every touch point with our visitors. We should decide which information is critical to collect for future campaigns and reporting.
Bringing **Smartness** into **Tourism Destinations** requires dynamically **interconnecting stakeholders** through a technological platform on which information relating to tourism activities could be exchange instantly. This integrated platform is having multiple touch points that could be access through a variety of end-user devices which will support the creation and facilitation of **real-time tourism experiences** and improve the effectiveness of tourism resources management throughout the destination at both the micro and macro level.

Integration of different technologies into an omni – channel tourism destination

Smart Tourism Destination beneficiaries

- **Tourists** are not the only ones taking advantage from innovation. Many stakeholders involved in the process of creating Smart Tourism Destination are also gaining benefits.

**Beneficiaries**

- GTDC
- Local Government
- Public Sector
- Companies from Tourism VC
- Citizens
- Tourists / visitors
Types of destination marketing and customization level - Key take-away

- **General Marketing**
  - All means of mass commercialization and promotion not addressed to any specific public. No specific focus and broad market targeting. No limited timeframe.

- **Special Campaigns**
  - Specific positioning /selling messages containing a unique differentiation message related to one destination's feature but addressed to a general public: for instance Kerala's campaign on backwaters tourism. Campaign with limited timeframe until another campaign is launched.

- **Marketing by products**
  - Specific positioning /selling messages focused on one type of product /main travel motivation and addressed to visitors responding to this interest profile. No limited timeframe.

- **Business intelligence and targeted marketing**
  - Omni-channel and personalized communication focused on target profile with specific contents catering for his/her preferences. Limited timeframe for each message, as communication is on-going and responsive to personal feedback.
Sustainable tourism development in Goa is a responsibility of everyone: civil society, public and private sector. Campaigns with state coverage should be undertaken to inform citizens and raise their awareness on the importance of tourism and tourism hospitality. In addition, a civic pride campaign should promote the uniqueness, protection and the importance to conserve the national Natural and Cultural heritages of Goa (either monuments or living culture and nature) while encouraging Goans to travel and visit destinations within their Taluka and others.

Objectives

- Definition of different campaigns per year: identification of awareness needs and key audiences to tap; definition of goals and strategies; definition of messages per target and communication tools for each one; definition of seasons and days for domestic tourism campaigns.
- Define the strategic partners per campaigns, such as public-private partnership with local tourism companies
- Define implementation schedule of each campaign
- Define the financial schemes and alternatives for funding
- Monitoring system for campaigns

Types of campaigns

- **Goan pride**: encourage domestic travels within the state in order to transmit the importance for Goans to know and feel their State
- **Tourism awareness in schools**: promote the importance of tourism for the State of Goa among young people and highlight the career opportunities in tourism
- **Community awareness**: This action could help the community to understand the need of the tourism industry in Goa and the benefits of this industry to the local community
- **Sustainable tourism awareness**: This project plans and programs on sustainable tourism for the population of the tourist destinations aimed at promoting and disseminating a culture which respects environment, natural resources and the cultural heritage of the country, by strengthening the national identity and pride
- **Goan hosts**: This project develops training programs on customer service techniques for staff not directly employed in the tourism industry but who have contact with tourists.
**Promotion & Communication - Key take-aways**

<table>
<thead>
<tr>
<th>Category</th>
<th>Key Take-Away</th>
</tr>
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<tbody>
<tr>
<td><strong>Website</strong></td>
<td>Use the web with the aim to build the brand, obtain awareness, attract new customers, transmit experiences and gather useful visitor information. Focused efforts are needed on new and updated content to align with new positioning and products.</td>
</tr>
<tr>
<td><strong>Mobile App</strong></td>
<td>Utilise advantages offered by Mobile App technologies like proximity marketing (partnerships), use of beacons, customized digital content or real time information. 85% of visitors use their smartphone when travelling.</td>
</tr>
<tr>
<td><strong>Key physical Contact Points</strong></td>
<td>Place key physical contact points in strategic areas (airport, port, famous attractions…) in order to guide, inform, educate and improve visitor experience.</td>
</tr>
<tr>
<td><strong>Press, Publicity and Prog. Mark</strong></td>
<td>Change advertising / publicity strategy into a cost – effective, targeted and experiential advertising plan.</td>
</tr>
<tr>
<td><strong>Social media</strong></td>
<td>Goa’s social media performance needs to be continued. Focus on quality of materials (video sharing, photos), interaction with visitors and gathering information about them.</td>
</tr>
<tr>
<td><strong>B2B, events &amp; Congress</strong></td>
<td>Define and establish a consistent plan for all intermediaries, from OTAs to specialized agencies.</td>
</tr>
<tr>
<td><strong>Customer Intelligence &amp; Campaigns</strong></td>
<td>Goa needs to know more about its visitors and launch campaigns in order to increase revenue (repetition, upgrade, cross selling), improve experience and increase loyalty including visitors’ proactive recommendation to other potential tourists.</td>
</tr>
<tr>
<td><strong>Smart Tourism Destination</strong></td>
<td>All the above tools should be integrated with each other and share valuable information and bring the visitor a modern omni – channel destination marketing that give quality experiences.</td>
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</tbody>
</table>

In order to increase not only the volume of higher spending tourists but also to boost international tourism, Goa will need to invest more and dedicate a higher % of today of its marketing budget to international marketing and promotion.
| 3. Commercialization and Promotion (C&P) | Brand enhancement               |
|                                         | Destination C&P                  |
|                                         | Products Commercialization and Promotion |
Now that Goa wants to focus on several products, a strategic marketing by products needs to be developed. The advantage of Marketing & Promotion on specific products is that can be done mainly through direct marketing based on specific experiences.

**Target**
1. Individual end user
2. Specialized Tour Operators (offering segmented experiences)
3. Associations & Clubs of members for a specific activity

**Promotion tools**
1. Sample itineraries
2. Social media
3. Influencers blogs & fam trips
4. Advertising in specialized websites for each activity
5. Attend specialized trade fairs and congress
It is important to develop product clusters of public and private tourism service providers sharing the same customer target, the same product market (nature tourism, cultural tourism, cruise tourism, etc); the same type or the same category. The aims of the clubs are to structure the touristic offer and to help increase quality, in such a manner to provide easy marketable products and answer the expectation of the market customers. The quality is reached by a set of membership standards that have to be accomplished, if any company or destination wants to be part of the club.

**Tourism Product Club Development & Promotion**

The following process proposed is adapted to obtain dynamic and attractive clubs to customers and companies. This project aims to create marketable and successful product clubs following the process below:

- Coordination of the initiative by a designated product manager
- Use of market studies to define adapted clubs to the industry and identification of club concepts with specific market needs
- Identification of company prerequisites to join a club – The club must welcome tourism companies and organizations with a minimum of quality requirement
- Identification of the activities and benefits of the club to members
- Selection of the different promotion channels for the club (brochure, roadshow, website, etc)
- Management of the schemes and definition of roles
- Identification of the type of business to be represented and integrated to the clubs
Thank you

This draft report has been submitted solely for discussion purposes to the client

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