



UIBC

UAE - CHAPTER

BRIDGING DESTINATIONS

A BLUEPRINT OF THE INDIA-UAE TOURISM LANDSCAPE



The UAE India Business Council – UAE Chapter (UIBC-UC), established on 18 February 2023 under the patronage of India’s Ministry of External Affairs and the UAE’s Ministry of Foreign Affairs and International Cooperation, is the official joint chamber promoting strategic economic collaboration under the Comprehensive Economic Partnership Agreement (CEPA).

With a robust network comprising 15 founding members representing the apex Indian and Emirati business organizations, UIBC-UC commands assets exceeding USD 1 trillion, positioning itself as a premier catalyst for shaping the economic trajectory of both nations. Committed to identifying and seizing strategic opportunities, UIBC-UC prioritizes investments in key sectors such as large infrastructure projects, manufacturing, technology, hybrid renewable energy initiatives, IT, tourism infrastructure, shipping, and facilitating Indian businesses to leverage the UAE as a global expansion hub.

The Council plays a key role in advancing CEPA’s objectives of increasing bilateral non-oil trade to USD 100 billion and securing USD 75 billion in UAE investments into India by 2030.

At UIBC-UC, we envision a future defined by unparalleled collaboration, innovation, and prosperity, ushering in an era of sustainable economic growth for both the UAE and India.

For further information on the UIBC-UC’s activities, please consult our website, www.uibcuae.com.

Bridging Destinations: A Blueprint of the India-UAE Tourism Landscape
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EXECUTIVE SUMMARY

This report aims to serve as an in-depth analytical companion to the coffee table book on India and UAE tourism relations. It is meant to expand the visual storytelling of the coffee table book with data-driven insights, policy analysis, and comparative evaluations. To complement the cultural narratives and imagery of the coffee table book, this report aims to delve deeper into the structural, economic, and strategic dimensions shaping the tourism landscape of the two countries.

The primary objective of this paper is to present a holistic understanding of the Indian and Emirati tourism sectors and examine the sector as a tool for bilateral growth and cultural diplomacy. It also aims to catalyze cross-border tourism linked investments, with a particular focus on driving investment flows from the UAE to India's high potential tourism sectors. The report seeks to highlight the key features and strengths of both countries, the local diversification of tourism products and offerings, comparative features between the two countries, potential bilateral growth synergies in the sector, and additional foreign tourism models. By contrasting the historical depth and diversity in the Indian tourism sector with the innovation and luxury of UAE's sector, this report offers constructive insights to inform future growth, innovation, and policy design.

The report will begin by exploring the cross-cultural harmony underpinning India-UAE tourism ties. It will then move on to present a comprehensive overview of the tourism sector in each country, followed by a comparative analysis of the countries' models and strategies. The sections on state-wise and emirate-wise analysis offer granular insights into the tourism offerings, while the study of global tourism models introduces best practices in the sector. This report concludes with recommendations to foster resilient, inclusive, and forward-looking tourism collaboration between the two nations.



“

“India’s approach to tourism is based on the ancient Sanskrit verse ‘Atithi Devo Bhavah’ which means ‘Guest is God’...Be it Music or Food, Arts or Culture, the diversity of India is truly majestic. From the high Himalayas to dense forests, dry deserts to beautiful beaches, adventure sports to meditation retreats, India has something for everyone.”

Shri Narendra Modi

Hon'ble Prime Minister of India

”



“

UAE-India relations transcend political and economic levels as the two nations have always enjoyed cultural ties which linked the Indian people and those of the GCC, especially the UAE, for centuries. The Indian community has contributed massively to the development of the UAE and continues to do so. We are deeply thankful for their contributions to our nation.

H.H. Sheikh Mohammed bin Zayed Al Nahyan

President of the UAE, Ruler of Abu Dhabi

”



“

“The UAE is among the top seven global destinations for international tourism spending, surpassing countries that have preceded us in this field for hundreds of years. We welcome tourists, delight in investors, embrace talents and build the best environment for living, tourism, and visits.”

H.H. Sheikh Mohammed bin Rashid Al Maktoum

Vice President and Prime Minister of the UAE, Ruler of Dubai

”



“

“Culture is not a legacy we preserve, but a bridge we build with others.”

H.H. Sheikh Dr. Sultan bin Muhammad Al Qasimi

Supreme Council Member and Ruler of Sharjah

”

FOREWORD BY THE CHAIRMAN

Tourism has emerged as a powerful engine for economic collaboration and cultural diplomacy between our two countries. The UAE continues to set global benchmarks with its iconic infrastructure, luxury offerings, and diversified attractions across all seven emirates. India, with its profound heritage, spiritual depth, and breathtaking natural diversity, remains an unmatched destination for travellers seeking meaning, rejuvenation, and discovery. Both countries, though distinct in their models, present vast opportunities for mutual learning and partnership.



This paper, *Bridging Destinations: A Blueprint of the India-UAE Tourism Landscape*, is an extension of our coffee table book *Opening New Gateways – Tourism in India & the UAE*. While the coffee table book celebrated the vibrancy and richness of both nations' tourism offerings through a visual narrative, this publication dives deeper into the strategic and structural aspects of the sector. It aims to unpack the dynamics shaping tourism in both nations through a multi-level lens, national, state/emirate, and global.

By analysing the strengths and contrasts of the UAE and Indian tourism sectors, and by examining best practices from international benchmarks, we strive to identify areas of high-impact collaboration. The document also outlines areas of potential, especially for UAE investors at India's evolving tourism ecosystem, ranging from medical and spiritual tourism to adventure and cruise tourism.

With over 4.3 million Indians calling the UAE home, cultural affinity has naturally extended into tourism, media, cuisine, and festivals. Our tourism partnership is not just a function of economic strategy, it is a celebration of shared stories, aspirations, and values.

Tourism is not merely a channel for economic exchange; it is a reflection of shared values, cultural affinity, and enduring trust between nations. I hope this report inspires stronger collaboration, progressive policy frameworks, and long-term investments in the sector. Together, we can shape a tourism corridor that is inclusive, future-ready, and recognized on the global stage.

- Faizal Kottikollon
Chairman of UIBC-UC &
Chairman of Kef Holdings

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The creation of *Bridging Destinations: A Blueprint of the India-UAE Tourism Landscape* has been a collective journey of insight, collaboration, and dedicated effort. This paper is the result of visionary guidance and the unwavering contributions of numerous individuals committed to strengthening the tourism ties between India and the UAE.

We express our deepest gratitude to the founding members of UIBC-UC, Mr. Faizal Kottikollon, Chairman of UIBC-UC and Chairman of KEF Holdings; H.E. Maj. Gen. (Retd.) Sharafuddin Sharaf, Vice Chairman of UIBC-UC and Vice Chairman of Sharaf Group; Mr. Tariq Chauhan, Board Member of UIBC-UC, and Co-Founder and Vice Chairman of EFS Facilities Services Group; and Mr. Dhanraj Nathwani, Founding Member of UIBC-UC and Director of Reliance New Energy Limited, for their strategic foresight, leadership, and steadfast support that laid the foundation for this initiative. We also thank our board member offices, Lulu Financial Holdings and Tata Sons, for their valuable contributions.

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To everyone who played a role in bringing this vision to life, we extend our heartfelt thanks for their commitment and passion in fostering greater collaboration and understanding between the tourism ecosystems of India and the UAE.

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ABBREVIATIONS

ADTD:	Ajman Department of Tourism & Development
AED:	United Arab Emirates Dirham
Ayush:	Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homoeopathy
BGBS:	Bengal Global Business Summit
CAGR:	Compound Annual Growth Rate
CEPA:	Comprehensive Economic Partnership Agreement
CoE:	Center of Excellence
DET:	Department of Economy and Tourism (Dubai)
DST:	Dubai Sustainable Tourism
e-Visa:	Electronic Visa
FDI:	Foreign Direct Investment
FEE:	Foreign Exchange Earnings
FTA / FTAs:	Foreign Tourist Arrivals
FTV / FTVs:	Foreign Tourist Visits / Visitors
GDP:	Gross Domestic Product
GoI:	Government of India
H1:	First Half of Year
HVAC:	Heating, Ventilation, and Air Conditioning
ICAO:	International Civil Aviation Organization
IGI:	Indira Gandhi International Airport
IHM:	Institute of Hotel Management
IHCL:	Indian Hotels Company Limited
IIFA:	International Indian Film Academy Awards
IKGS:	Invest Kerala Global Summit
IITTM:	Indian Institute of Tourism and Travel Management
JWCC:	Jio World Convention Centre
KLI-SOFC:	Kochi–Lakshadweep Islands Submarine Optical Fiber Connection
LGSCATSS:	Loan Guarantee Scheme for COVID-Affected Tourism Service Sector

ABBREVIATIONS

MEA:	Ministry of External Affairs (India)
MICE:	Meetings, Incentives, Conferences and Exhibitions
MoU:	Memorandum of Understanding
MOFAIC:	Ministry of Foreign Affairs and International Cooperation (UAE)
NGO:	Non-Governmental Organization
NIDHI+:	National Integrated Database of Hospitality Industry
NSST:	National Strategy for Sustainable Tourism
PIB:	Press Information Bureau
PPP:	Public-Private Partnership
PRASHAD:	Pilgrimage Rejuvenation and Spiritual, Heritage Augmentation Drive
RCS-UDAN:	Regional Connectivity Scheme – Ude Desh ka Aam Naagrik
RevPAR:	Revenue per Available Room
SAATHI:	System for Assessment, Awareness and Training for Hospitality Industry
SMART:	Specific, Measurable, Achievable, Relevant, Time-bound
SNCF:	Société Nationale des Chemins de Fer français (French National Railway Company)
STB:	Singapore Tourism Board
TCT:	Tourism Confederation of Tanzania
TTDI:	Travel and Tourism Development Index
UNESCO:	United Nations Educational, Scientific and Cultural Organization
UT / UTs:	Union Territory / Union Territories
VVP-II:	Vibrant Villages Programme – II
WEF:	World Economic Forum
WTTC:	World Travel & Tourism Council



01

CROSS-CULTURAL HARMONY: INDIA AND UAE AS PARTNERS IN TOURISM

The Indian-UAE tourism relationship emerges from the intertwined network of historical, cultural and diplomatic ties. The nations' shared heritage, diasporic community, and growing collaboration in new tourism sectors are defining and marking the growing relationship between both nations as strategic partners. The following section showcases the many connections that will drive mutual tourism growth.

The UAE and India have always held a strong connection with an everevolving partnership, reinforced by solid commercial ties, cultural affinities, and the sizeable Indian diaspora that continues to contribute to the economic and social landscape of the UAE. Tourism has materialized as a significant driver of this relationship, backed by the complementing assets of both countries - India's extensive, rich in culture, and expansive sustainable tourism offers, and the UAE's top-notch infrastructure, opulent experiences and global connectivity. This collaboration now encompasses a wide range of of tourism sectors such as historical, cultural, adventure, shopping, MICE Tourism and much more, showcasing a multifaceted and contemporary tourism exchange. The UAE-India CEPA has further accelerated this expansion by expediting visa procedures, improving air connectivity, and encouraging bilateral investment. We will further delve into the development and potential of the significant partnership in the upcoming sections.

“Our ancient scriptures have a saying. Atithi Devo Bhavah. Meaning, "guest is god". And, that is our approach to tourism. Our tourism is not just about sight-seeing. It is an immersive experience. Whether it is Music or Food, Arts or Culture, the diversity of India is truly majestic. From the High Himalayas, to Dense Forests, From the Dry Deserts, to Beautiful Beaches, From Adventure Sports, to Meditation Re-treats, India has something for everyone.”¹

- Shri Narendra Modi, Hon'ble Prime Minister of India

1. UAE and India’s tourism ties

Owing to the strong bilateral ties between the two countries, India falls within one of the top 5 tourism source markets for the UAE. The growth in volume of tourists in the recent years is a reflection of the depth of personal relations fostered by the two countries. There are wide horizons for both countries to develop innovative tourism products and services that will boost the contribution of the tourism sector’s contribution to both countries' economies.²



“India is a key economic and tourism partner for the UAE, and we are working towards enhancing cooperation in the fields of sustainable, medical, and cultural tourism, as well as adventure tourism, shopping and MICE tourism for mutual benefits.”⁴

- H.E. Abdulla bin Touq Al Marri, Minister of Economy and Tourism of UAE

Only 3-4 hours flight time from New Delhi to the UAE, making it a popular tourist destination for Indians.

The countries also share close historical ties, with the first Cultural Agreement being signed in 1975. Since then, the bilateral ties between the countries have only strengthened.

2. Cross – Cultural Connections

Indians form the largest ethnic community in the UAE, constituting more than 35% of the country’s population⁵. The huge Indian community also plays a pivotal role in hosting and facilitating increased tourism activity in the UAE. (2024 data)

Emiratis are also familiar and receptive to Indian culture. The UAE is one of the biggest overseas markets for Bollywood, and several radio and television channels broadcast Bollywood shows, movies and songs dubbed in Arabic.



India was declared as the ‘Guest of Honour Country’ at the 2018 Abu Dhabi Festival.

UAE serves as the centre stage for several blockbuster Bollywood films as well and plays a major role in marketing and fundraising. Etihad Arena, Abu Dhabi is now 3 time host of the International Indian Film Academy Awards (IIFA).

3. Political Diplomacy and Tourism

Indian Prime Minister Shri Narendra Modi has visited the UAE 7 times since 2014, reinforcing the strong bilateral ties between the countries. H.H. Sheikh Mohammed bin Zayed Al Nahyan, President of the UAE and Ruler of Abu Dhabi, has also visited India 3 times.⁷

Recently, UAE's Minister of Economy and Tourism, H.E. Abdulla bin Touq Al Marri met with India's Minister of Culture and Tourism, Shri Gajendra Singh Shekhawat to strengthen cooperation in the tourism and hospitality sectors. In this high profile meeting, the two countries discussed promoting sustainable tourism projects and leveraging capabilities like infrastructure and logistics.



His Highness Sheikh Hamdan bin Mohammed bin Rashid Al Maktoum, Crown Prince of Dubai on his visit to New Delhi on 10th April 2025 with Hon. Prime Minister of India Shri Narendra Modi.
Source: Middle East Economy⁸



Hon. Minister of Culture and Tourism of India, Shri Gajendra Singh Shekhawat, on his visit to Abu Dhabi with H.E Abdulla bin Touq Al Marri, Minister of Economy and Tourism of UAE, April 2025.
Source: X.com¹⁰

4. Strategic Tourism Collaboration

The several high profile visits between the two countries has allowed for comprehensive economic and cultural agreements to come into place. The UAE is now India's third largest trading partner, India's second largest export destination, and fourth largest source of FDI, as of 2024.⁹

These bilateral agreements are testament to the deep cultural and political ties between the two countries. Given the immense importance of India in UAE's tourism statistics, it is essential to analyze and critique the vast potential of collaboration between India and UAE.



India's Culinary Touch in Emirati Homes



- The UAE and India share centuries - old cultural ties, particularly visible in cuisine, where Indian spices and dishes like chicken biryani and chicken tikka masala have influenced Emirati favorites such as chicken machboos.
- Indian foods like paratha, curry, and desserts such as rasmalai are widely loved in the UAE, reflecting the strong culinary bond between the two nations.¹¹

India UAE Bollywood Ties



- The UAE serves as a stunning backdrop for Bollywood films, while Emiratis embrace Indian culture through cinema, deepening cultural ties between the two nations.
- Movies like Pathaan, Happy New Year, Race 3, and Tiger Zinda Hai have utilized locations in Dubai and Abu Dhabi, showcasing the region's opulent settings.¹²
- Additionally, Bollywood icon Shah Rukh Khan serves as the brand ambassador for Dubai tourism symbolizing the deep connection between Indian cinema and the Emirates.¹³



02

INDIA'S TOURISM OVERVIEW

Tourism is significant for the economy and national identity of India and has changed over the years from traditional pilgrimage paths to digital tourism. India is a destination that offers an array of possibilities, including spiritual tourism, eco-tourism, adventure tourism, and heritage tourism, etc. This section outlines India's tourism history, government actions, key niches, post-COVID recovery, and growth prospects for the aviation and hospitality sectors.

Indian tourism sector's expanding role as a key driver of economic growth and development is undeniable. Contributing 5% to India's GDP and providing 12.57% of the country's jobs in 2022-23,¹⁴ it plays a vital role in economic progress and employment generation. Its footprint broadens beyond the economy, advancing heritage conservation and environmental preservation. India ranks at the top in some of the largest tourism economies in the world for natural, cultural and nonleisure assets.

India's tourism industry didn't emerge overnight - dating back to ancient trade routes, pilgrimages, and the grandeur of the Mughal era, long before it became the economic powerhouse it is today.

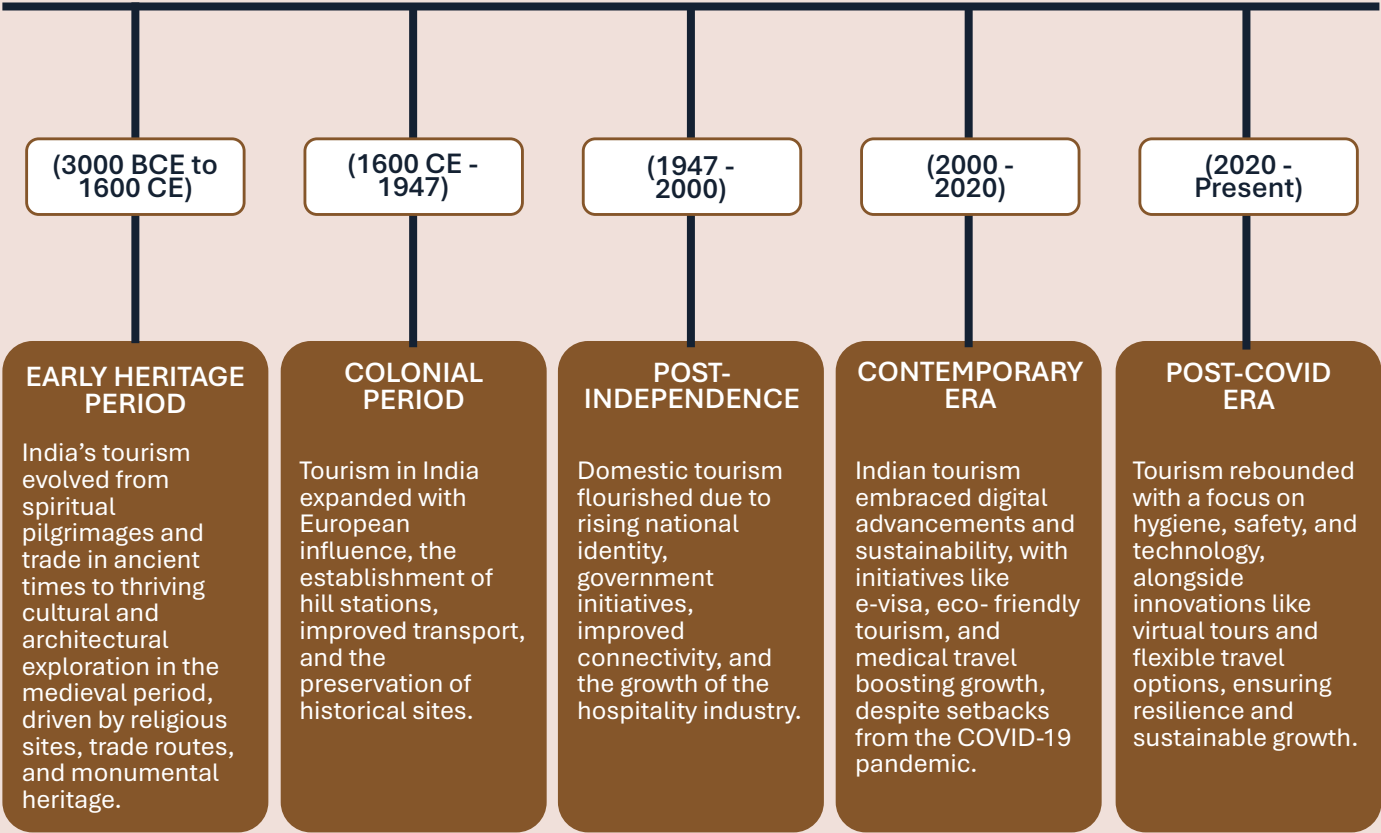
9.66 M
Foreign Tourist Arrivals (FTAs), 2024

US\$ 33.34 B
Foreign Exchange Earnings (FEEs), 2024

Source: Ministry of Tourism Annual Report 2024-25¹⁵

54TH (2021)
→
39TH (2024)

India's Ranking - Travel and Tourism Development Index (TTDI) 2024 report published by the World Economic Forum (WEF)



IMPACT OF COVID ON TOURISM

PRE COVID (2019)

In 2018, travel and tourism solely contributed 9.2% to India's GDP.¹⁶

26.7¹⁷ million jobs were created by the tourism sector in 2018.



DURING COVID (2020-2021)

Foreign Tourist Arrivals (FTA) found to be downcast by about 67%.

Tourism only contributed to 1.5% to the total GDP in the year 2020 and 1.75% in the year 2021.¹⁸

In an attempt to prevent the COVID-19 epidemic from escalating, the Ministry of Home Affairs restricted the Government of India's e-Tourist visa scheme.



POST COVID RECOVERY (2022-2024)

In 2022–2023, as tourism began to recover from the impact of COVID-19, its contribution to GDP rose back to 5%

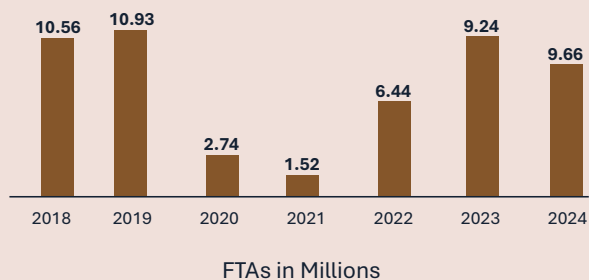
The tourism sector created 76 million jobs in FY23.¹⁹

The Chalo India initiative, launched on March 7, 2024, encourages the Indian diaspora to promote inbound tourism by referring non-Indian friends to visit India, offering 100,000 gratis e-tourist visas until March 2025.

The Loan Guarantee Scheme for COVID- Affected Tourism Service Sector (LGSCATSS) provides financial relief by offering loan guarantees to tourism operators and guides to help them recover from the impacts of the COVID-19 pandemic (June 2021)

Phased relaxation of e-Tourist visa scheme (Dec 2024).

FOREIGN TOURIST ARRIVALS IN INDIA



Source: Ministry of Tourism Annual Report 2018-2024

India's Vision 2047:²⁰

Sets ambitious tourism targets.

Foreign tourist arrivals goal:

From under 11 million (FY2020) to 100 million (base case) and 150 million (optimistic scenario) by 2047.

Spending per foreign tourist:

Increase from US\$ 2,700 to US\$ 4,500

KEY NICHE TOURISM SEGMENTS

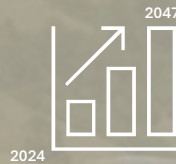
According to the Ministry of Tourism's 2024-25 report, the Indian government has identified key niche tourism segments for development and advancement in the upcoming year, presenting potential investment opportunities. Let's explore these niche tourism types in more detail.

1. ADVENTURE TOURISM

With its diversified terrain — from the magnificent Himalayas and wide-ranging coastlines to both hot and cold deserts, India presents an unprecedented ground for adventure tourism. Thrill-seekers can indulge in high-altitude mountaineering, white-water rafting, and skydiving, while those preferring a moderate pace can traverse through scenic trails by means of trekking, cycling, and camping. Realizing the immense potential, the Ministry of Tourism established an action plan with the goal of improving safety, building infrastructure, encouraging talent development, and positioning India as a leading international destination for adventurous travelers.²¹

US\$ 3T

tourism economy
by 2047



US\$ 800B

targeted contribution
from adventure tourism
sector alone

Market Forecast
(2024–2030)

18.3%

2024–2030 - CAGR

US\$ 47M

Projected Revenue by
2030

Source: Financial Express²²

LADAKH: LAND OF HIGH PASSES

Trekking: The Markha Valley & The Chadar Trek
Motorbiking: Khardung La & Chang La Peak
climbing, camping, Horse Riding and more.

RISHIKESH: THE LAND OF DIVINE AND ADVENTURE

White-Water Rafting at the Ganges River
Bungee Jumping: India's highest bungee jumping
point, around 117 meters above the ground.

ANDAMAN AND NICOBAR ISLANDS

Known for water sports such as scuba diving,
snorkeling, sea walking and more. Most popular
destinations include Havelock and Neil Island.

MEGHALAYA: ABODE OF CLOUDS

Caving: Mawsmai Cave and Liat Prah Cave
Trekking: Cherrapunji, Living Root Bridge Trek River
Canyoning, rappelling, paddling and more.

AULI: A LAND OF SPIRITUAL ESSENCE (UTTARAKHAND)

India's premier Skiing destination. Also popular for
activities like snowboarding and trekking at Gurso
Bugyal for naturally beautiful views.

JAISALMER: DESERT ADVENTURES

Known for Camel Safaris, Dune Bashing and
Desert Camping symbolising the traditional
Rajasthani music and dance.

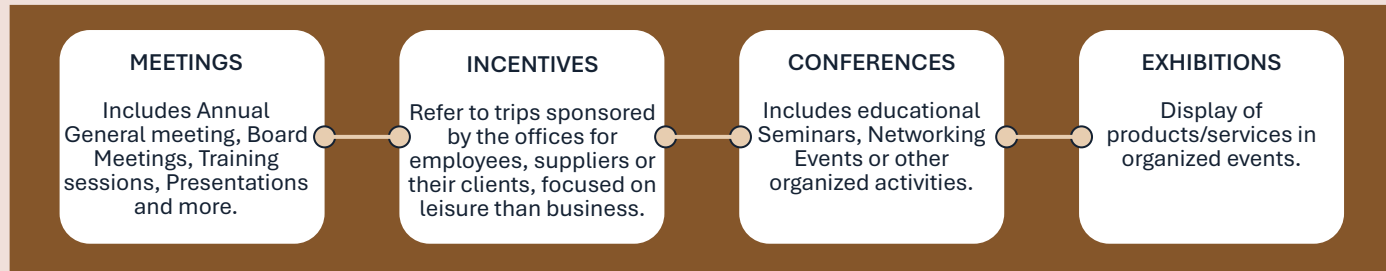


Hon'ble Minister of Culture and Tourism, Shri. Gajendra Singh Shekhawat celebrates adventure tourism with a thrilling tandem skydive at Sky-high, Narnaul Airstrip, Haryana, on 13th July 2024. A historic milestone for India's aero sports sector.

Source: Tourism Annual Report 2024-2025²³

2. MEETING INCENTIVES CONFERENCES AND EXHIBITIONS (MICE)

As per the Tourism report 2024-2025, MICE Tourism has been identified as one of the niche tourism segments the government plans to focus on in the near future and has taken initiatives for in the previous year.



MICE tourism is a powerful economic engine, promoting business expansion, dissemination of knowledge, and skill advancement. MICE ensures year-round steadiness for the travel industry, alleviates job uncertainty, and gives rise to high revenue as delegates tend to spend beyond that of the leisure tourists.

To highlight India as a MICE destination, the Ministry of Tourism has established the "Meet in India" brand. In collaboration with the States and Industry, several campaigns are being run on social media for the same. Additionally, the Ministry has started the "India Says I do" campaign to brand India as an ideal location for weddings.²⁴

“After 2014, India has shown a tremendous growth curve in infrastructure given the boom in infrastructure, be it the construction of roads over 1,50,000 km, new railway stations, semi high-speed trains, inland waterways and more than 150 operational airports. All of these have contributed to India's prowess with regards to the MICE events (Meetings, Incentives, Conferences, and Exhibitions). The confidence also built following India's hosting of G20 nations, the entire world is looking at India in awe and curiosity. In times to come, India will emerge as the MICE capital of the world.”²⁵

Shri Gajendra Singh Shekhawat, Hon'ble Minister of Culture and Tourism, India, 2025



Mr. DHANRAJ NATHWANI
 Director, Reliance New Energy Limited
 Founding Member of UIBC-UC

"As India's global position strengthens, options of global-standard venues that can host Meetings, Incentives, Conferences and Exhibition (MICE) events across the country are also on the rise, expanding impressively to pose significant competition to international destinations.

Equipped with well-established infrastructure, seamless connectivity and convenient gateway access for international travelers, Mumbai is located at the crossroads of global culture and commerce.

Jio World Convention Centre (JWCC), is an extension of this glittering commercial and cultural reserve. Mumbai's first master-planned precinct stands out with smart infrastructure, a multitude of five-star and luxury hotels along with premium shopping, dining, and entertainment experiences, and a robust network of roads, railways and metro-lines connecting it to the international and domestic airports, as well as other major hubs of the city.

In less than three years JWCC has hosted more than four million guests and over 3000 events including marquee events like the International Olympic Committee (IOC) session, Miss World Grand Finale, Comic Con India, World Congress of Accountants, Global Fintech Fest, Architectural Digest Design Show, Outbound Travel Mart (OTM), and many more."

3. ECO AND SUSTAINABLE TOURISM

Ecotourism is a form of responsible tourism that focuses on preserving the environment, supporting local communities, while recognizing rich cultural and traditional heritage.

In line with this vision, the Government of India launched **Travel for LiFE** under Mission LiFE, envisioned by Hon. Prime Minister Shri Narendra Modi, first introduced at the G20 Tourism Working Group Meeting in Srinagar and globally launched on World Tourism Day 2023 to promote sustainable tourism and cultural preservation.²⁶

NATIONAL STRATEGY FOR SUSTAINABLE TOURISM

- Launched in 2022 by the Ministry of Tourism, encourages local community participation and livelihood generation.
- Uses a hub-and-spoke model to structure ecotourism sites.
- Focuses on sustainability through monitoring and certification.
- Proposes creating a national body for standards and accreditation.²⁷

POPULAR ECOTOURISM ACTIVITIES:

- Trekking in Uttarakhand's Valley of Flowers National Park
- Wildlife safaris in Madhya Pradesh's Kanha and Bandhavgarh National Parks
- Camping in the deserts of Rajasthan
- Exploring tea farms in Assam

NATIONAL STRATEGY FOR ECO TOURISM

- Drafted in 2022 by the Ministry of Tourism to boost ecotourism using national and environmental guidelines.
- Encourages collaboration among central ministries, states, NGOs, and the private sector.
- Focuses on pillars like state ranking, capacity building, promotion, and governance.
- Plans to rank states on global ecotourism standards to drive competitiveness.



4. RURAL TOURISM

Rural tourism drives on appealing tourists to reside in a rural lifestyle and escape the bustle of their urban city life. Considering villages being the nation's repositories, it allows travelers to experience India's rich culture, traditions, crafts, heritage, and agricultural methods. Through tourism, these regional goods bolster rural communities, create jobs and revenue in rural regions, while realizing the intent of Hon'ble Prime Minister for an 'Aatmanirbhar Bharat'.²⁸

Government of India launched **National Strategy and Roadmap for the development of Rural Tourism** in India on 8th December 2021.



National Strategy for Promotion of Rural Homestays was launched on 5th May 2022.

The Union Cabinet, led by Prime Minister Narendra Modi, has approved Vibrant Villages Programme-II (VVP-II) as a 100% centrally funded scheme with an outlay of **₹6,839 crore (US\$ 820 million)**,²⁹ to be implemented in strategic border villages across 18 States/UTs until **FY 2028-29**.



The programme focuses on infrastructure development, value chain creation, SMART education, tourism circuits, and sustainable livelihoods to enhance socio-economic growth in remote border areas.³⁰

States identified:

- Arunachal Pradesh
- Assam
- Bihar
- Gujarat
- J&K (UT)
- Ladakh (UT)
- Manipur
- Meghalaya
- Mizoram
- Nagaland
- Punjab
- Rajasthan
- Sikkim
- Tripura
- Uttarakhand
- Uttar Pradesh
- West Bengal



Handmade and handprinted pots, Kolkata, West Bengal, India



Hornbill festival held at Kisama Vilege, Naga Tribe, Nagaland, India



Kadalundi - Kozhikode, Kerala, India

Source: Annual Tourism Report 2024-25, Ministry of Tourism, GoI³⁰

5. CRUISE TOURISM

India, with its enormous coastline arching over 7,500 kilometers, unexplored forests, pristine islands, and extensive historical and cultural heritage, displays great opportunities to present itself an ideal destination for cruise tourism. Boasting a vast network of navigable waterways interconnecting 400 rivers and an established maritime system that includes 12 main and 200 minor ports³², India is an incredible gateway to river and coast-based cruise tourism.

Top 2 cruise tourism routes in India



MV Ganga Vilas Cruise

The world's longest river cruise (51 days, 3,200 km) from Varanasi to Dibrugarh, covering 27 river systems, including Bangladesh. It features luxury suites and visits major heritage sites and national parks.



Brahmaputra River Cruise

Operated by Pandaw and Assam Bengal Navigation, this cruise explores Assam's wildlife and culture, including Kaziranga National Park and Majuli Island.

Public Private Investments



Through an MOU with the state's Transport Department at Bengal Global Business Summit (BGBS) 2025, Antara Cruises is investing ₹800 crore (US\$ 96 million)³³ over five years to promote river tourism in West Bengal. The initiative's main goals are to increase the number of luxury cruise services offered, construct shipbuilding facilities, and generate thousands of jobs, 70–80%³⁴ of which will be filled by skilled local workers. The collaboration seeks to establish West Bengal as a major global center for upscale river tourism while fostering innovation and heritage.



Cordelia Cruise, India's most luxurious cruise line

Source: cordeliacruises³⁵



Andaman Cruise, India

Source: konkan.me³⁶

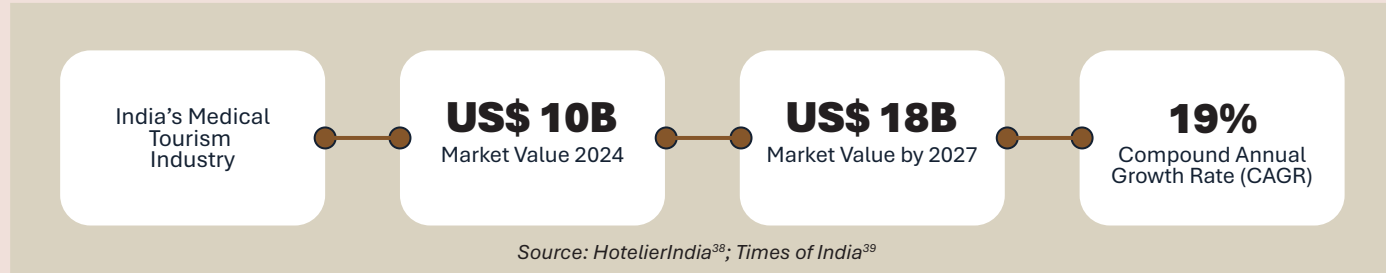


Antara's Catamaran at Bhitarkanika, Odisha, India

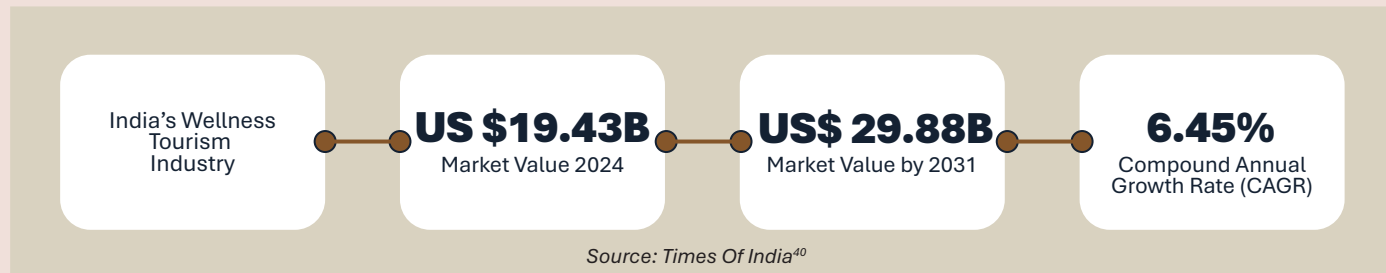
Source: Economic Times³⁷

6. MEDICAL & WELLNESS TOURISM

India is rapidly emerging as a leading destination for both medical and wellness tourism, attracting patients who seek top-tier medical care at affordable prices while also exploring the country's rich cultural heritage.



In addition to its established medical tourism offerings, India is also becoming a key player in the wellness tourism market. With its ancient healing practices, including yoga, naturopathy, and ayurvedic treatments, India provides a unique wellness vacation experience. The growing global demand for alternative medicine and holistic healthcare is driving the expansion of the Ayurvedic market, with India's ayurveda gaining increasing influence.



Government Initiatives

The Indian government is boosting wellness tourism through initiatives like the **Ayush Visa** and the "**Heal in India**" campaign to attract international medical and wellness travelers.

Key destinations

Key destinations such as **Kerala, Rishikesh, Mysuru, and Puducherry** are being positioned as hubs for traditional healing practices like Ayurveda and Yoga.⁴¹



Mr. FAIZAL KOTTIKOLLON

Chairman of KEF Holdings
Chairman of UIBC-UC

"Tulah, which means Balance in Sanskrit, aims to lead the wellness tourism space by integrating clinical expertise with sustainable, eco-conscious practices. At the heart of KEF Holdings' ethos is making a positive societal impact. Keeping this in mind we prioritize sustainability at this Net Zero wellness space, with energy-efficient infrastructure using technology such as aquifer pits and radiant cooling. While making this a community project empowering the people around us, we focus on organic farming based bespoke meals curated by world class chefs. Our commitment to environmental stewardship complements our holistic healthcare offerings, creating a comprehensive experience that promotes both personal well-being and global sustainability."



Tulah Clinical Wellness Sanctuary, Calicut, Kerala, India
Source: Tulah Clinical Wellness⁴²



H.E Abdulla bin Touq Al Marri, Minister of Economy and Tourism of UAE was the guest of honour during the launch of Tulah Clinical Wellness in Feb 2025.
Source: The Hindu⁴³

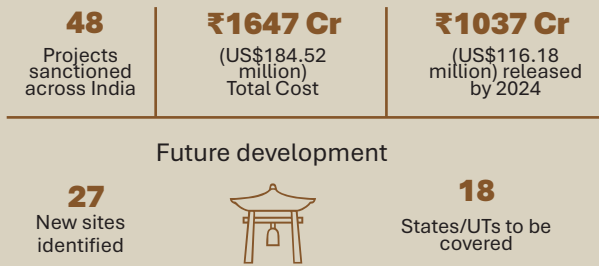
7. SPIRITUAL AND RELIGIOUS TOURISM

Religious tourism in India has grown from traditional pilgrimages to globally sought-after spiritual experiences, driven by initiatives like PRASHAD* and SWADESH Darshan. Sites such as Varanasi, Bodh Gaya, and Rishikesh attract international visitors for yoga, meditation, and Ayurveda. UNESCO-recognized heritage sites like Bodh Gaya and Ajanta-Ellora, along with events like Kumbh Mela and International Yoga Day, and digital influencer culture, have made spiritual travel more aspirational and globally appealing.⁴⁴

With over 450,000⁴⁵ religious and cultural sites, India is a major hub for spiritual tourism. The sector is projected to reach US\$ 59 billion by 2028⁴⁶. Events like the Spiritual & Wellness Summit 2025 in Ujjain reflect the growing fusion of wellness and spirituality, further boosting international interest. Varanasi, Haridwar, Tirupati, Shirdi, Katra, Amritsar, and Rameswaram continue to lead in domestic tourist footfall.

National Mission on PRASHAD was launched in January 2015 for development of tourism infrastructure in the country including historical places and heritage cities.

Key Highlights of the PRASHAD Scheme:



Recent sanctions include:



Source: Ministry of Tourism Annual Report 2024-25⁴⁷



Hon. Prime Minister of India Shri Narendra Modi takes a holy dip at the Sangam during the Maha Kumbh in Prayagraj, Uttar Pradesh, India.

Source: Indian Express⁴⁸

To support the 2025 Maha Kumbh in Prayagraj, the government constructed facilities such as a Shivalay Park and a Lost and Found Center, ensuring enhanced tourist safety and experience. Over 4600⁴⁹ organizations set up camps and tents as the event came closer.



Neem Karoli Baba Ashram Kainchi Dham, Uttarakhand, India.

Steve Jobs' 1974 visit to India, including a stay at Neem Karoli Baba's ashram, profoundly influenced his spiritual outlook and later shaped Apple's minimalist and intuitive design philosophy.⁵⁰

”It was an experience that shaped my view of simplicity and focus. It helped me understand the importance of clarity in my vision.”⁵¹
– Steve Jobs, Co-founder and former CEO of Apple

*PRASHAD - Pilgrimage Rejuvenation and Spiritual, Heritage Augmentation Drive

8. GOLF TOURISM

Golf tourism in India is rapidly gaining momentum as a premium travel segment, attracting high-value, long-stay visitors who contribute significantly to the tourism economy while maintaining a low environmental footprint. The country offers a diverse range of scenic and historic golfing destinations—from the snow-capped mountains surrounding the **Gulmarg Golf Course in Kashmir**, to the **Kensville Golf Club near Ahmedabad** blending luxury with heritage, and the coastal charm of **The Leela Golf Resort in Goa**. These picturesque courses not only offer world-class facilities but also immerse visitors in India's rich landscapes, culture, and hospitality.⁵²



Royal Calcutta Golf Club, Kolkata, India Oldest Golf Court of India

Source: Yo Metro⁵³



Gulmarg Gold Course, Kashmir, India One of the highest golf courses in the world (8,690 ft above sea level)

Source: 4Moles⁵⁴

TOURISM INITIATIVES BY INDIA

INCREDIBLE INDIA CAMPAIGN

Launched during the financial year 2017-18 Incredible India 2.0 is to unlock India's tourism potential to boost GDP, create employment, and enhance its global image by positioning the country as a leading global travel destination.⁵⁵



To promote various destinations and tourism products including spiritual, medical and wellness tourism to potential markets overseas.



Shift from generic promotions world-wide to market-specific promotional plans.



Develop quality content and thematic narratives to showcase India's diverse tourism offerings more effectively.



Strengthen India's presence via annual global campaigns across print, electronic and digital media in important and potential market overseas.

Source: Press Information Bureau, Government of India⁵⁶

OUTCOMES:

- Regulatory reforms: liberalized visa regime (e-tourist visa), relaxed aviation norms
- Pilot tourism development in underexplored state (e.g., Karnataka)

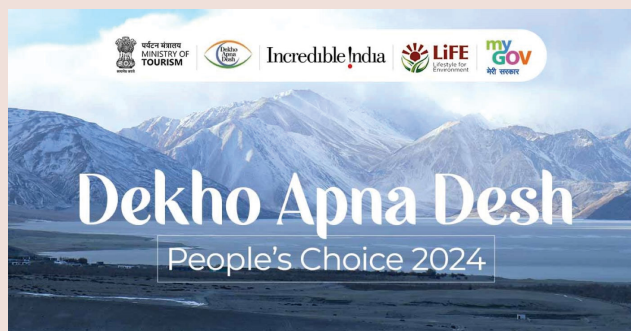


DEKHO APNA DESH CAMPAIGN

Launched by the Ministry of Tourism in 2020, the Dekho Apna Desh (See Your Own Country) campaign focuses on domestic tourism, encouraging Indians to explore their own country.

OBJECTIVES

- Revive the tourism sector post-COVID-19
- Engage citizens via online pledge, webinars, quizzes, polls to encourage Indian citizens to explore and travel within India
- Promote offbeat, spiritual, cultural, adventure and heritage destinations



Dekho Apna Desh - People's Choice 2024: Launched on 7 March 2024 by Prime Minister Modi, the campaign sought public input to identify top tourist attractions across five categories-Spiritual, Cultural & Heritage, Nature & Wildlife, Adventure, and Others -to guide development priorities for "Viksit Bharat @ 2047".⁵⁷

ATITHI DEVO BHAVA CAMPAIGN

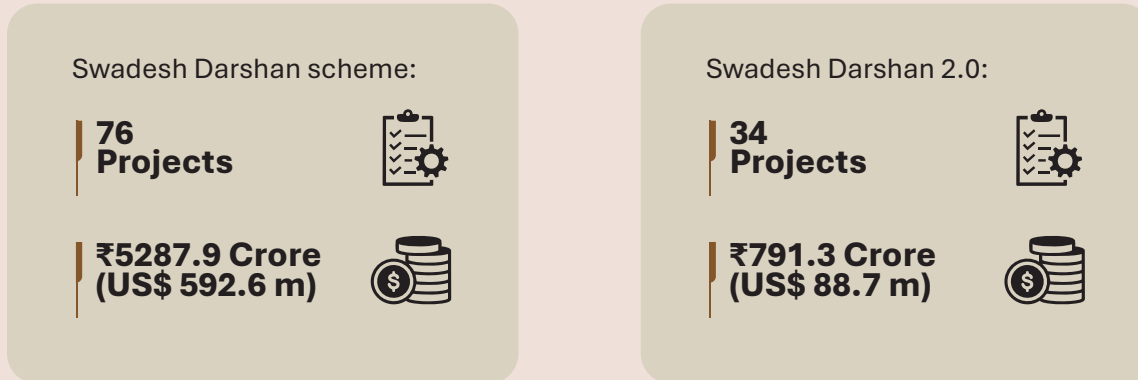
Launched in 2005, the campaign aimed to promote the age-old Indian hospitality ethos, "Atithi Devo Bhava" ("Guest is God"), by sensitizing and training all tourism stakeholders to offer respectful, gracious, and high-quality service.

Homestay Initiatives in Bhopal: Ahead of the February 2025 Global Investors Summit, local households hosted delegates, training families in guest amenities-rooms, food, and orientation.



SWADESH DARSHAN SCHEME

The Ministry of Tourism launched the Swadesh Darshan Scheme in 2015 and, after implementing 76 projects⁵⁸, conducted a comprehensive review identifying key areas for improvement such as strategic destination selection, better monitoring, and sustainable operations. In response, the revamped Swadesh Darshan 2.0 adopts a mission-based approach to develop sustainable, responsible, and self-reliant tourism destinations, aligning with the vision of Aatmanirbhar Bharat.



Source: Press Release Ministry of Tourism⁵⁹

THE G20 SUMMIT

The Group of Twenty (G20) is the premier forum for international economic cooperation. It has an important impact on the development and reinforcement of global architecture and governance for all significant international economic matters. It has an important impact on the development and reinforcement of global architecture and governance for all significant international economic matters.

India held the Presidency of the G20 from 1 December 2022 to 30 November 2023, and hosted the 18th G20 Summit at Bharat Mandapam in New Delhi during 9-10 September, 2023. A few attendees included US President Joe Biden, Canadian Prime Minister Justin Trudeau, Japanese Prime Minister Fumio Kishida

The G20 Summit had a significant impact on promoting Indian tourism both domestically and internationally. As a global event that brought together world leaders, dignitaries, and media attention from around the world, it showcased India's potential as a tourism destination and strengthened its position on the world stage.

The key impacts of G20 summit on India's tourism are (i) Global visibility, (ii) Spotlight on India's hospitality, (iii) Promotion of India's soft power, (iv) Strengthening India's Global Image as a Tourist Destination.



UAE President H.H. Sheikh Mohammed bin Zayed Al Nahyan participated in the G20 Summit held in New Delhi, India, chaired by Shri Narendra Modi, Hon'ble Prime Minister of India.
Source: Ministry of Foreign Affairs, UAE.⁶⁰

INDIA'S HOSPITALITY INDUSTRY & ITS IMPACT ON TOURISM

ROLE OF HOSPITALITY IN TOURISM

The hospitality and tourism industry greatly impacts employment and economic growth in India. Domestic travel has also led to an increase in jobs in industries such as event planning, food and beverage, hospitality, and IT support. Industry innovation will be enhanced by other smart technologies like contactless check-in. Significant occasions such as the 2023 G20 Summit also created jobs and drew tourists from abroad, highlighting the pivotal role this sector plays in India's aspiration to be the world's third-largest economy by 2047.⁶¹

Market size growth, Leisure travel & Market sector



Indian hospitality industry investments **US\$ 1 B** Expected by 2028⁶³

- The industry includes organized sectors such as the IHCL and Oberoi Hotel chains and unorganized sectors such as guesthouses and homestays.
- Growth is driven by domestic travel and grand weddings like the Ambani wedding. In January 2025, Coldplay's concerts in Mumbai and Ahmedabad attracted large crowds from India and overseas significantly increasing hotel rates around the venues.⁶⁴
- India's diverse tourism sector showed strong growth potential through 2025.

TRENDS IN HOSPITALITY SECTOR

1 Sustainability

- Green tourists prefer eco-friendly hotels over conventional ones.
- Taj Mahal Palace, Mumbai is 100% powered by renewable energy and hosted G20 delegates in 2023.
- The Oberoi Udaivilas in Udaipur sources up to 50 per cent⁶⁵ of its power requirements from recently commissioned solar plants.

2 Customization

A major improvement in the hospitality sector is in providing tailored services to guests thereby captivating tourists globally. Hotels aim to provide personalized experiences from reservation to departure. Online travel agencies (OTA) like MakeMyTrip, Airbnb, etc. allow travellers to chart their trips at their fingertips.



Maha Kumbh Mela 2025, in Prayagraj, Uttar Pradesh, India.

Maha Kumbh Mela 2025: A Case in Point

- Maha Kumbh Mela 2025 offered real-time assistance, live streaming, green stays, and major infrastructure upgrades.
- ₹7,500 crore (US\$ 900million)⁶⁶ investment by the UP government boosted jobs and tourism services.
- Customized packages and guided tours made spiritual tourism more global and engaging.

AIRBNB

Airbnb is optimistic about the booming tourism economy in India, Gen Z travel bookings from India doubled and millennial bookings rose nearly 30%⁶⁷ in the first three quarters of 2024 compared to 2023. By working with the Ministry of Tourism on developing heritage stays and hosting workshops with state governments, Airbnb created over 85,000 jobs and added US\$ 920 million⁶⁸ to India's GDP between April 2022 and March 2023.

RESORTS

Modern-day travelers, often more concerned with experiences rather than material things, have driven the themed, well-being, and eco-hotel trend, including hotels by Hilton that have been launched in India. These hotels appeal to tastes in sustainability, luxury, special events such as weddings, and assists tourism, through sustainable and meaningful products.⁶⁹



Mr. SAURABH TIWARI

Area Director - Middle East and CIS
The Indian Hotels Company Limited (IHCL)
Tata Sons is a Board Member of UIBC-UC

”

“Taj hotels are more than just accommodations; they are gateways to India’s rich history, architecture, and culture, blending tradition with modern luxury to create lasting experiences. Taj hotels reflect the essence of Indian culture through thoughtful design, curated art collections, and authentic culinary offerings. Signature dining experiences, like those at Varq or Bombay Brasserie, introduce global audiences to the diversity and richness of Indian cuisine.”

”



”

“Conversely, at our properties in India, including those in Kerala, we offer a gateway to India’s rich traditions. Guests from the UAE are welcomed with authentic Indian hospitality, including traditional greetings and rituals. Our culinary offerings feature local flavors, such as Kerala’s famous sadya served on banana leaves, alongside a variety of Emirati-inspired dishes to make guests feel at home. We also organize local experiences, such as live performances of classical art forms like Kathakali and Mohiniyattam, and curated nature tours showcasing Kerala’s serene backwaters and lush greenery.

We also provide Kerala-inspired experiences for our visitors at the Grand Hyatt Kochi. We make sure there is an Arabic-speaking point of contact for visitors from the Middle East and greet them with a traditional garland of spices and tender coconut water.

The rooms have a combination of Kerala-inspired and Middle Eastern amenities. All the eateries' and IRD's menus are in Arabic. With reference to the cultural heritage, our chefs thoroughly describe the dish and its preparation to the guests.

We know tourists would like to visit Kochi during their stay, so we plan a city tour that includes Fort Kochi and explain the area's distinctive colonial past to them. The guide explains everything in Arabic.”

”

-Representative from Twenty14 Holdings

A sister Concern of Lulu Financial Holdings
Lulu Financial Holdings is a Board Member of UIBC-UC

GOVERNMENT INITIATIVES IN HOSPITALITY SECTOR

SAATHI

SYSTEM FOR ASSESSMENT, AWARENESS AND TRAINING FOR HOSPITALITY INDUSTRY (2020)

India's Ministry of Tourism and Ministry of Health & Family Welfare developed the SAATHI framework to ensure hygienic conditions and safety in the hospitality industry. Hotels and units go through self-certification, take part in webinars focused on improvement, and it results in increased stakeholder confidence and enhanced brand image in terms of eco-consciousness, safety and hygiene.⁷⁰

NATIONAL INTEGRATED DATABASE OF HOSPITALITY INDUSTRY+ (2021)

The IT system of the Ministry of Tourism automates travel and hospitality workflows, enabling services such as Star Classification and facilitating policy processes. The NIDHI+ program ensures inclusivity by classifying and registering stakeholders for the National Digital Tourism Mission to establish a common digital tourism ecosystem to develop scalability and competitiveness in India's tourism and hospitality sector.⁷¹

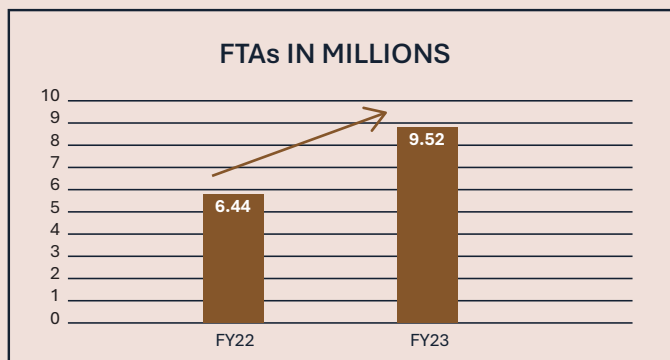
NIDHI+

THE INCREDIBLE INDIA BED & BREAKFAST/HOME STAY SCHEME

The Incredible India Bed & Breakfast/Home Stay Scheme first introduced in 2007 promotes Indian hospitality, culture, and food to international and domestic tourists by staying with Indian families in their home environment and pricing accommodations at reasonable prices. The Ministry of Tourism has set forth some guidelines that classify the stays and conduct workshops to promote home stays. States and Union Territories further use these guideline to fit their situations. As of July 2023, 2,200 rooms across 432 homes, mostly in south Delhi, were registered under the scheme.⁷²

INDIA'S AVIATION INDUSTRY & ITS IMPACT ON TOURISM

Tourism and aviation are complementary industries; tourism supports aviation services, while aviation enables travelers reach their destination.



Source: India Tourism Data Compendium Key Highlights 2024, India's Tourism Performance⁷³

The Ministry of Civil Aviation is developing Public-Private Partnership (PPP) modalities for the privatization of 25 airports⁷⁴ under the National Monetization Pipeline between 2022 and 2025.

Expected investments By 2027

US\$ 25 billion

Source: New Approaches to PPP Focusing on the Airport Sector, Niti Aayog, Government of India.⁷⁵

Operational airports within India



75
in 2014

159
in 2024

Source: Ministry of Civil Aviation, Government of India⁷⁶

Increasing regional accessibility for tourism and local development⁷⁷

Air Passengers traffic



376.43
Million
FY24

Source: IBEF⁷⁸

Domestic air passenger traffic in India

152
Million
In 2023

6.12%
Growth

161.3
Million
In 2024

Source: Business Standard, Directorate General of Civil Aviation data⁷⁹

GOVERNMENT INITIATIVES IN AVIATION SECTOR

RCS-UDAN SCHEME

REGIONAL CONNECTIVITY SCHEME-UDE DESH KA AAM NAGRIK

The RCS-UDAN scheme launched on October 21, 2016 brings connectivity to unserved and underserved airports as part of the Government of India's effort to improve tourism and local hospitality industries to 46 listed destinations as well as spurring economic growth. The scheme aims to enable flying for the Tier-2 and Tier-3 cities, which will assist with 3% economic growth and 6% employment⁸⁰ growth as per the ICAO (International Civil Aviation Organization). As part of this scheme, the Ministry of Tourism⁸¹ has partnered with the Ministry of Civil Aviation and has made operational 53 tourism routes for better connectivity of important tourist destinations including iconic sites.

SpiceJet is driving regional tourism through UDAN and upcoming land and seaplane services in remote areas like the Andamans and hill regions by 2025, reflecting rising private sector confidence.

Source: *Travel Trends Today*⁸²

Adani Airports plans to invest US\$ 7 billion over the next ten years to expand and upgrade airport infrastructure, focusing on enhancing passenger experience and landside development.

Source: *IBEF*⁸³

Akasa Air has expanded its fleet to 29 aircrafts in 2025, improving affordable air connectivity across India and Southeast Asia, boosting tourism access and regional growth.

Source: *Times of India*⁸⁴

India is accelerating airport infrastructure with new terminals underway in Varanasi, Agra, Darbhanga, and Bagdogra, and airports inaugurated in Sarsawa, Rewa, and Ambikapur.

21

Greenfield airports are approved

12

Greenfield airports Operational by 2023



Key projects: Noida and Navi Mumbai airports.

Source: *Indian Aerospace and Defence Bulletin*⁸⁵

India's airport sector is poised for significant growth, with over Rs 1 lakh crore (US\$11.68 billion)⁸⁶ in capital expenditure expected in the next four to five years. This investment will address capacity bottlenecks and fund both greenfield and brownfield airport projects.

RISING DEMAND IN HELICOPTER INDUSTRY

There is a growing demand for helicopter service in India's tourism sector, especially for transferring pilgrims in hilly regions as well as increasing connectivity in areas of religious tourism. For example, the Heli Rides at Jatayu Earth's Center in Kerala shows how helicopter services can enhance tourism and build infrastructure with helipads.



Source: *Jatayu Earth's Centre*⁸⁷



03

UAE'S TOURISM OVERVIEW

The UAE's tourism landscape represents a rapid phase of evolution from a pearl diving economy to a global luxury tourism destination. Each Emirate is defined by its own unique offerings: from skyscrapers and shopping to cultural heritage and desert experiences. This section will explore ideal tourism models, tourism policy approaches, and diversification initiatives across the UAE with a region-specific approach.

TOURISM TIMELINE

Once reliant on oil, the UAE has reinvented itself as a global tourism haven in just three decades. Each of its seven emirates offers something unique - from Dubai's skyscrapers and luxury lifestyle to Abu Dhabi's cultural landmarks. Sharjah showcases rich heritage, Ras Al Khaimah offers mountain adventures, Fujairah boasts beaches and forts, while Ajman and Umm Al Quwain provide peaceful coastal escapes. Together, they shape a dynamic and diverse tourism landscape.

1971 - 2000



Transformation into a Global Tourism Haven

Oil wealth boosted tourism; Emirates Airlines launched (1985), Abu Dhabi built iconic landmarks, Sharjah promoted heritage, and rising expats improved living standards and services.

2010 - 2020



Shaping the Future of Tourism

Dubai introduced Dubai Opera and Expo 2020; Abu Dhabi launched the Louvre; other emirates highlighted ecotourism, beaches, family resorts, and cultural preservation.

Pre 1971



From Pearls to Prosperity

UAE's early economy relied on fishing, textiles, and pearl diving until oil discovery spurred foreign investment, infrastructure, and global economic growth by 1971.

2000 - 2010



Transformation and Diversification

Dubai led with luxury and landmarks; Abu Dhabi focused on culture, Sharjah on Islamic heritage, RAK on ecotourism, Ajman on family beaches, and UAQ on preserving history.

Post Pandemic



Resurgence and Rejuvenation

Post-COVID, UAE revived tourism via safety measures, Dubai 2040 Master Plan, national campaigns, and continued niche promotions across all emirates.

IMPACT OF COVID AND RECOVERY ON TOURISM

COVID-19 IMPACT ON TOURISM

The total contribution of travel and tourism to the UAE's GDP fell sharply, a clear indicator of the pandemic's disruption.

11.6%

AED 180.48 bn (US\$ 49.1 bn) in 2019



5.4%

AED 71.68 bn (US\$ 19.48 bn) in 2020

Source: Information and Services, UAE Government⁸⁸

- In response, the UAE launched safety initiatives such as the “Dubai Assured Stamp” and “Go Safe Certificate” to reassure travelers and ensure hygiene compliance.⁸⁹



Dubai Opera

POST-PANDEMIC RECOVERY & REVIVAL

- While International tourists spent about AED 217.3 bn (US\$ 59.17 bn) in 2024, domestic travellers chipped in AED 57.6 bn (US\$ 15.68 bn), up 41% compared to pre-pandemic 2019.

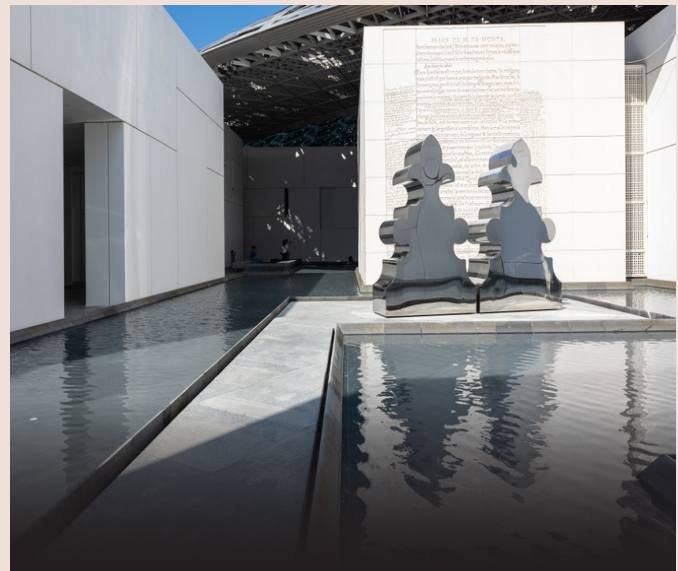
Source: Information and Services, UAE Government⁹⁰

US\$ 70.1bn

Tourism sector contribution to UAE's GDP in 2024.

Source: Arabian Business⁹¹

- Dubai Expo 2020, though delayed, became a global symbol of resilience - drawing millions and reigniting worldwide interest in the UAE's tourism through its immersive and innovative experiences.
- Post-COVID, the UAE broadened its tourism narrative beyond luxury and infrastructure by investing heavily in entertainment, arts, and culture.
- Flagship projects like the Dubai Opera, Dubai Design District, and Louvre Abu Dhabi have become cultural landmarks that appeal to a global audience.⁹²



Louvre Abu Dhabi

POST COVID

- The UAE emerged as one of the fastest countries globally to revive its tourism sector, driven by bold initiatives, global events, and strategic investments.
- Tourism's GDP contribution rebounded to 11.7% in 2023 and further rose to 13% in 2024, marking a full recovery and surpassing pre-pandemic levels.

Tourism sector GDP contribution

11.7%

AED 220 bn (US\$59.9 bn) in 2023



13%

AED 257.3bn (US\$70.06 bn) in 2024

Source: Wam⁹³; Arabian Business⁹⁴



UAE TOURISM LANDSCAPE

1. LUXURY TOURISM

In the realm of tourism, UAE offers a wide variety of luxuries, Abu Dhabi with the 5-star Emirates Palace and the Sheikh Zayed Grand Mosque with its stunning grandeur. The UAE is best known for providing the luxury traveller with an exclusive customized experience where sky's the limit. The beloved and most visited Dubai Mall, the world's tallest building Burj Khalifa and the Palm Jumeirah consisting of glamorous five-star hotels all contribute to Dubai's luxurious charm.

UAE LUXURY TRAVEL MARKET

US\$ 16.66B in 2024  **US\$ 29.6B** By 2030
growing at a **10.4 percent CAGR from 2025 -2030**

Source: Khaleej Times⁹⁵



The Atlantis, Dubai, Luxury Resort, Palm Jumeirah



Emirates Palace, 5-star award-winning hotel, Abu Dhabi



Burj Al Arab, World's only 7-star hotel, Dubai



The Galleria Al Maryah Island, Premium shopping destination, Abu Dhabi, UAE



SAURABH TIWARI

Area Director - Middle East and CIS
The Indian Hotels Company Limited (IHCL)
Tata Sons is a Board Member of UIBC-UC

“While Taj has not yet introduced a desert safari experience in the UAE similar to its Indian wildlife safaris, the potential for such ventures is considerable. The UAE's expansive deserts and rich Bedouin heritage provide an excellent environment for luxury desert tourism. By leveraging their expertise in crafting experiential stays, Taj could develop high-end desert resorts that offer guests authentic cultural interactions, desert safaris, dune bashing to Bedouin style camps and stargazing experiences, thereby tapping into the growing niche of luxury desert tourism.”

2. ADVENTURE TOURISM

For adrenaline seeking adventurers, UAE is a prime destination full of life changing experiences across magnificent landscapes. From skydiving over the Palm Jumeirah to the unique escapades through the Desert.

In Hatta, visitors can experience the serene and calm journey of Kayaking through the waters and hiking up the mountains. Yas Waterworld, Ferrari World, Aquaventure contribute to UAE's world class theme parks and expand the adventure tourism perspective to unimaginable heights and where speed has no limits.



HH Sheikh Hamdan Bin Mohammed Bin Rashid Al Maktoum skydiving
Source: Gulf News (2022)⁹⁶

Adventure Tourism Market Growth Projections



Source: Zawya Press Release⁹⁷

UAE'S FIRST CROSS-EMIRATE ADVENTURE CORRIDOR (MAY 2025)

A partnership between: Ras Al Khaimah Tourism Development Authority (RAKTDA) & Fujairah Adventures

A unique multi-day trekking route across Ras Al Khaimah and Fujairah, featuring Jebel Jais peaks, Jais Rim Trail, zip-lines, Bear Grylls Camp, Fujairah wadis, Altaybbah & Seven Summits heritage trails, coastal ridges, and desert terrain.



Longest Zipline in the world, Ras Al Khaimah.
Source: Insydo⁹⁸



Ferrari World, Yas Island, Abu Dhabi - Home to the world's fastest rollercoaster.



Kayaking in Hatta, Dubai.



Mina Rashid, Dubai.
The world's largest covered cruise terminal.

Dubai Cruise Tourism (DCT), under DTCM, promotes Dubai globally for cruise tourism to ensure seamless operations at Mina Rashid's world-class cruise terminals.

3 . CULTURAL HERITAGE TOURISM

Sharjah, the cultural capital of the UAE, leads the nation's heritage tourism with landmarks like the Sharjah Art Museum and Calligraphy Museum that reflect its artistic and historical depth. Across the country, world-class museums such as the Louvre Abu Dhabi and Etihad Museum merge innovation with tradition, attracting culturally curious travellers.

Traditional souks like Dubai's Gold, Spice, and Textile Souks, and Sharjah's Blue Souk, offer authentic experiences through local crafts and historic trade, keeping the spirit of Emirati heritage alive.

PILLARS OF CULTURAL HERITAGE

Festivals

- Sheikh Zayed Heritage Festival
- Sharjah Heritage Days

Clubs

- Emirates Heritage Club
- Juma Al Majid Centre for Culture and Heritage

Museums

- Sharjah Museum of Islamic Civilization
- Al Ain Palace Museum

Mosques

- Sheikh Zayed Grand Mosque
- Al Noor Mosque, Sharjah

Cultural Authorities

- Ministry of Culture
- Fujairah Culture and Media Authority



Traditional Emirati male Al Ayalah dance at Al Hosn Festival



Emirati woman weaving baskets from dry palm leaves during Zayed Heritage Festival



Old Bur Dubai souk market in Creek district

01

Dubai ranked Globally for highest attendance per event, 2024.

World's Best MICE Destination – Dubai 2024



US\$ 5.6
Billion
Valuation

8.8%
Expected
CAGR

US\$ 8.6
billion by
2029

UAE's MICE position and Valuation 2024

Source: exhibit CityNews⁹⁹, Travels Dubai¹⁰⁰, BW Hotelier¹⁰¹

4 . MICE TOURISM

MICE (Meetings, Incentives, Conferences and Exhibitions) tourism has a special place in the UAE. High-profile places such as the World Trade Centre (Dubai), Dubai Exhibition Centre and Abu Dhabi National Exhibition Centre serve as prime locations for major global events (GITEX, Gulf Food etc.). These events serve as a platform that attracts people from all over the world, including business leaders, policy makers and others, which collectively contributes to the economy.

As there is an elegant mixture of hospitality, connectivity, infrastructure and cutting-edge technology, UAE is a dynamic centre for international business, becoming a world class hub for incentives, corporate meetings and exhibitions.



International Defense Exhibition and Conference, Abu Dhabi, UAE, 2023

5. SPORTS TOURISM

The UAE is positioning sports tourism as a core part of its economic diversification strategy. Dubai World Cup being a major global sports event for horseracing, the Abu Dhabi Formula One Grand Prix, the Dubai Desert Classic Golf Tournament and the FIFA Club World Cup all show how UAE's sports tourism goes to cover a wide variety of sports. Cricket a beloved sport by many held its ICC Men's Champions Trophy 2025 at the Dubai International Cricket Stadium.¹⁰²

Apart from hosting major events, UAE has outstanding facilities to offer athletes and enthusiasts an outlet to define their skills and let their minds and bodies run free.



Dubai World Cup day in Meydan Racecourse on Saturday, 29th March 2014.



Race day for the 2023 Formula 1 Abu Dhabi Grand Prix.



Hero Dubai Desert Classic, Emirates Golf Club, 29 January 2023 in Dubai.

45%

UAE residents would plan an entire holiday around a live sporting event, 2025.

US\$2.5 bn

Annual contribution of Sports tourism to UAE's Economy, Sept 2024

Source: Arabian Business¹⁰³

The UAE has invested heavily in facilities like Yas Marina Circuit and Etihad Arena, which support global events and long-term tourism growth.

6. ECO TOURISM

The country provides a wide range of eco-friendly experiences from the peaceful dunes of the Arabian Desert to the life giving eco systems of the Ras Al Khor Wildlife Sanctuary. While the Hajar Mountains and Marmoom Desert reflect a strong commitment to environmental conservation guided tours are increasingly emphasising and promoting these efforts. This proves that UAE is a perfect location for those who seek sustainable development by preserving or reconnecting with nature.



Luxglamp UAQ (Umm Al Quwain) Eco Tourism Project. The world's first luxury glass-domed glamping property set within mangroves.

Source: Luxglamp Instagram¹⁰⁴

ROLE OF GLOBAL EVENTS IN PROMOTING INTERNATIONAL TOURISM

In recent years, the UAE has rapidly positioned itself as a global entertainment hub, with music tourism emerging as a powerful driver of international travel. Major concerts and festivals are no longer side attractions but central reasons for visits, contributing significantly to tourism diversification.¹⁰⁵

Entertainment-led tourism is a key catalyst in the UAE's post-COVID tourism recovery, encouraging not just new visitors but also repeat travel.

STRATEGIC IMPLICATIONS	
TREND	STRATEGY
Concerts driving travel demand	Host global artists and annual music festivals
Spikes in accommodation needs	Expand short-term rental and hotel capacity
Repeat visitor potential	Create travel & event packages and loyalty offers
Experience-based preferences	Promote local stays and cultural experiences



According to John Bevan, CEO of Dnata Travel Group, travel trends in the UAE have undergone a significant shift, with tourists now prioritizing concert and event-based experiences over traditional beach and shopping tourism

STAR PERFORMERS

Coldplay's January 2025 shows in Abu Dhabi sparked a hotel boom, with room rates soaring by 375% and properties fully booked across the city.

Source: *hoteliernmiddleeast*¹⁰⁶

STATE OF ART VENUES

- Etihad Arena – Abu Dhabi
- Coca-Cola Arena – Dubai
- Dubai World Trade Centre (DWTC)
- Yas Marina Circuit – Abu Dhabi



Global Village, Dubai, UAE.
10.5 million visitors, season 29, 2024-25.

Source: *Global Village Official Website*¹⁰⁷



Expo 2020, Dubai, UAE.
Attracted over 24 million visitors, 2020.

Source: *International Meetings, 2024*¹⁰⁸

KEY GOVERNMENT INITIATIVES

UAE TOURISM STRATEGY 2031

This initiative is set to be one of the most significant projects in the coming years. The National Tourism Strategy 2031 grew from the cooperation between the Ministry of Economy and various local and federal entities and institutions.

This strategy encompasses 25 initiatives to develop the tourism sector in the UAE, based on 4 key directions:

- National tourism identity to be strengthened and unified
- Identifying specialised tourism products
- Bringing skilled groups of professionals to boost the tourism economy and expanding capabilities
- Increasing investments in the tourism industry.



AED 450 billion (US\$ 122.6B)

Raise Tourism sector's GDP Contribution by 2031



40 million

Hotel Guests by 2031.



AED 100 billion (US\$ 27.2B)

Bring additional tourism investments to UAE by 2031

Source: U.AE, UAE Government Portal¹⁰⁹

THE UAE STRATEGY FOR DOMESTIC TOURISM 2020

Launched in 2020, the strategy aims to unify and promote tourism across all emirates, strengthening domestic tourism's contribution to the national economy.

Key implementation measures include:

- Promoting each emirate's tourism assets
- Launching a unified UAE domestic tourism website
- Supporting the growth of local tourism companies
- Encouraging investment in local tourism projects
- Introducing training and academic programs in tourism
- Harmonizing tourism-related legislation
- Boosting public-private sector partnerships
- Marketing winter tourism packages via the hospitality sector.

While domestic visitor spending fully recovered in 2022, it continued to grow in 2023 to reach more than AED 55.5bn (US\$15.1bn) which is almost 40% higher than 2019.

Source: World Travel & Tourism Council (WTTC)¹¹⁰

DUBAI SUSTAINABLE TOURISM INITIATIVE

Launched in 2016, Dubai Sustainable Tourism (DST) aims to position Dubai as a top sustainable destination, aligning with the United Nations Sustainable Development Goals (UN SDGs) and UAE's Net Zero 2050 through focused programs and standards.

Four Pillars:

- **Education:** Dubai Way platform offers training to enhance sustainability knowledge in the tourism workforce.
- **Awards:** Hotels meeting high sustainability standards earn the DST Stamp (Gold, Silver, Bronze).
- **Programs:** Tools like the Carbon Calculator help track and reduce tourism-related emissions.
- **Standards:** Enforces 19 Sustainability Requirements with best-practice guidelines and regular monitoring.

DST champions sustainability through initiatives like Dubai Can, cutting over 30 million single-use plastic bottles since 2022, and launching DUBAI REEF, the world's largest purpose-built reef project.

Source: Dubai Media Office¹¹¹

UAE'S UNIQUE OFFERINGS AND OPPORTUNITIES

The UAE stands out with its iconic modern marvels alongside rich cultural heritage sites. On the angle of biodiversity, UAE is known for its stunning natural wonders from the vast Liwa Desert to the picturesque Hajar Mountains.

Some reasons as to why there is a certain uniqueness and vast opportunity for tourism in UAE are:

HARMONY

- As the UAE is home to many people of different cultures and religious beliefs, to foster peace and harmony, the Year of Tolerance was announced in 2019.
- A place where east and west co-exist harmoniously.



CONNECTIVITY

- UAE serves as one of the world's leading global aviation hubs, connecting major international airlines across continents.
- The UAE's airports are indeed vital global hubs due to their strategic location, with nearly half the world's population reachable within an eight-hour flight.



INCLUSIVITY

- A range of activities and events that are for all age groups. This also includes personalized packages for budget friendly travelers.



BIODIVERSITY

The UAE is vast in terms of nature. Some of the hidden gems include:

- Snoopy Island, Fujairah
- Al Wathba Fossil Dunes, Abu Dhabi
- Wadi Shawka, Ras Al Khaimah
- Mangrove walk, Jubail Island, Abu Dhabi
- Salt Lake, Abu Dhabi
- House of Wisdom, Sharjah
- Hatta Lake, Dubai
- Ras Al Khor Wildlife Sanctuary, Dubai
- Mangrove Beach and Forest, Umm al Quwain



STABILITY

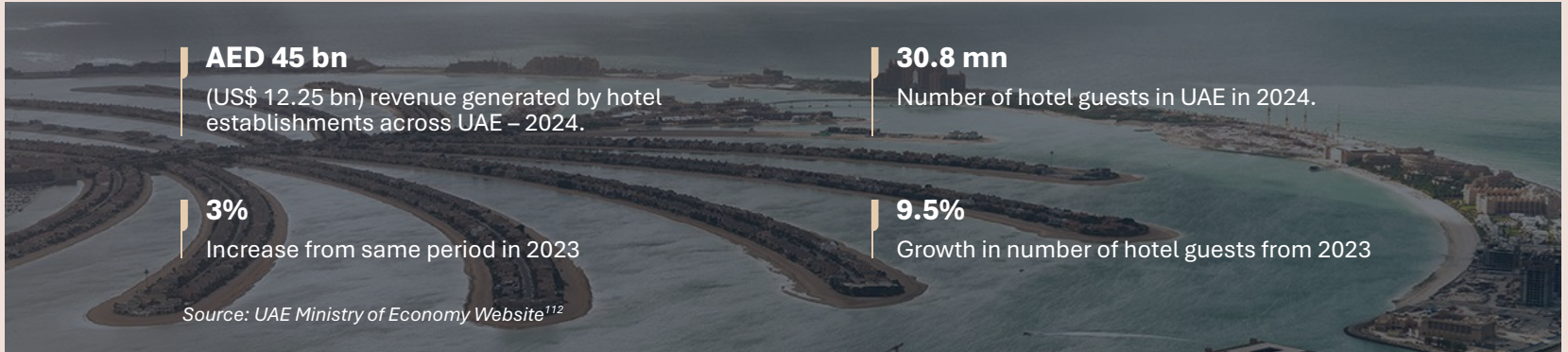
- In many ways the UAE is a prime destination because it assures its visitors a sense of stability in terms of economic and political aspects.



UAE'S HOSPITALITY INDUSTRY & ITS IMPACT ON TOURISM

The hospitality sector in the UAE is renowned for its luxury, inventiveness, and variety of experiences. It offers accommodations for every type of traveler, from luxury hotel apartments and desert glamping to famous hotels like the Burj Al Arab, Atlantis The Palm, and Emirates Palace. The UAE's blend of modern luxury and tradition is reflected in the stunning architectural landmarks that house private beaches, theme parks, underwater suites, and sky-high pools.

The UAE's hospitality sector offers a wide spectrum of stays, from affordable boutique hotels to world-renowned luxury resorts, making it accessible to every budget.



Upcoming Hospitality Projects

01 PALM JEBEL ALI

A massive waterfront development led by Nakheel that is twice as large as Palm Jumeirah and has 110 km of coastline, 80+ hotels, and 35,000 beachfront residences.

02 CIEL TOWER

At 365 meters in Dubai Marina, the hotel is expected to be the tallest in the world, featuring 1,004 rooms, an infinity pool on the rooftop, and stunning panoramas.

03 RAMHAN ISLAND

A US\$ 3.5 billion luxury island development off Abu Dhabi with 1,800 villas, 120 hotel keys, marina residences, and wellness resorts.

Source: Arabian Business¹¹³

ROLE OF EVENTS IN DRIVING HOSPITALITY

Through large-scale events that increase demand for travel and lodging, the UAE continues to expand its hospitality industry. One example of how big entertainment events increase hospitality is the 300% increase in hotel reservations that followed Coldplay's January 2025 performance near Zayed Sports City. Similarly, Expo 2020 Dubai, which took place from October 2021 to March 2022, drew over 24 million tourists, solidifying the country's standing as a major international destination for events and tourism.

Source: Gulf News¹¹⁴



UAE'S AVIATION INDUSTRY & ITS IMPACT ON TOURISM

The UAE has established itself as a global aviation hub through strategic investments in infrastructure and airline networks. With flights to 606 locations across the globe, airlines such as Etihad Airways and Emirates guarantee smooth global connectivity. The UAE is committed to preserving its standing as a major aviation hub through investments in sustainable aviation technologies and steady increases in air traffic.

Source: Wam¹¹⁵

"Supported by strong air connectivity, Dubai has a prominent presence on the global stage for trade, investments, tourism, and is a leading player in aviation and logistics,"¹¹⁶

H.H. Sheikh Ahmed bin Saeed Al Maktoum, Chairman and Chief Executive, Emirates Airline & Group, and -Chairman of Dubai Airports, during the release of an economic impact study by Emirates Group and Dubai Airports, compiled by global research firm Oxford Economics.



- 531,000 air traffic movements in H1 2025
- 6.2% increase compared to H1 2024.



- 75.4 million passengers in H1 2025
- 5% increase compared to H1 2024

Source: Wam¹¹⁷

KEY DEVELOPMENTS IN UAE AVIATION

Zayed International Airport (formerly Abu Dhabi International Airport) presents a major opportunity for Abu Dhabi. With Terminal A opening in late 2023 and biometric systems operational by 2025, increased capacity and advanced technology are set to attract more international routes, boosting tourism and economic growth.

The \$35 billion expansion of Dubai's Al Maktoum International Airport (DWC) will make it the world's largest, handling 260 million passengers annually. By 2034, Emirates Airlines plans to shift operations there, with 400 gates and five runways, unlocking major opportunities in airline alliances, cargo, and aviation investments.

Source: Gulf News¹¹⁸

The UAE is home to 10 main commercial and executive airports, 3 in Abu Dhabi, 2 in Dubai, and 1 each in Sharjah, Ras Al Khaimah, Fujairah, Ajman, and Umm Al Quwain. This growing network reflects the country's drive to welcome the world and reinforce its place as a global gateway for tourism and travel.

KEY PILLARS IN UAE'S AVIATION

In 2025, the UAE stands at the forefront of aviation industry transformation, driven by bold investment strategies.

Source: Aviation World Congress¹¹⁹

Dubai's aviation sector contributing over **US\$ 53 bn,** **32%** of its GDP as of 2024.

Emirates and Etihad Airways are instrumental in driving the UAE's tourism sector, leveraging their expansive global networks, innovative stopover programs, and strategic partnerships to attract millions of international visitors.

Emirates carried a record 51.9 million passengers in 2023–24, reinforcing Dubai's status as a leading global tourism hub.

Source: Travel and Tour World¹²⁰

Etihad Airways is driving Abu Dhabi's tourism with its Stopover Programme, which saw a 76% rise in visitors and is set to attract over 130,000 guests in 2025.

Source: Etihad Airways¹²¹

Besides Emirates and Etihad, low-cost carriers like Air Arabia and Flydubai also significantly boost UAE tourism, carrying 16.7 million and 13.8 million passengers respectively in 2023.

Source: Air Arabia Press Office; Dubai Media Office¹²²

The recent interline agreement between Emirates and Etihad (2023)¹²³ further enhances the UAE's appeal by allowing seamless open-jaw itineraries, enabling tourists to explore both Dubai and Abu Dhabi within a single trip and ticket, thus maximizing the country's tourism potential.



World's largest aircraft Airbus A380. Emirates Airline.



04

CONTRASTING TOURISM MODELS

TOURISM INDUSTRY: INDIA & UAE

India and the UAE have contrasting yet complementary tourism models. India is primarily cultural and natural heritage, and the UAE is promoting cutting-edge state-of-the-art infrastructure and luxury tourism experiences. Each tourism model demonstrates how the countries use those differences to appeal and invest in their competitive advantages to attract other target markets around the world. In this section, the focus is on infrastructure, marketing, digital adoption, and strategic investments in both countries.

TOURISM MODELS

INDIA



- ▮ Culture Preservation
- ▮ Spiritual Tourism
- ▮ Heritage Tourism
- ▮ Natural Capital

UAE



- ▮ Luxury-driven
- ▮ Unified Branding
- ▮ Futuristic Experience
- ▮ Strong Infrastructure



Traveling to India is about discovering the destination, every place has a soul, a story, a legacy. In contrast, the UAE offers a seamless experience where the destination adapts to the traveler, crafting luxury, adventure, and comfort at every turn.

While India weaves luxury into its rich tapestry of heritage and culture, the UAE integrates wellness into its fast-paced, modern lifestyle, both broadening their tourism models.



H.E. MAJOR GENERAL (RETD.) SHARAFUDDIN SHARAF

Vice Chairman of Sharaf Group
Vice Chairman of UIBC-UC

India and the UAE are distinct markets, catering to different segments and offering unique attractions. The UAE, being smaller in size and population, primarily attracts tourists for its safety, modern culture, beaches, and shopping. In contrast, India, with its vast geography, diverse terrains, and year-round weather variations, draws visitors for its rich history, culture, rejuvenation, and health-focused tourism.

The two markets also differ significantly in terms of focus and strategy. In the UAE, the emphasis is on providing luxury experiences, world-class shopping festivals, and family-friendly attractions such as theme parks and resorts. The compact size of the UAE allows for easier access to multiple experiences, from beaches to desert safaris, making it an appealing destination for both short getaways and longer stays.

India, on the other hand, offers a wide array of experiences tied to its heritage, such as historical tours, spiritual journeys, yoga retreats, and Ayurveda treatments. The country's vastness requires region-specific strategies to cater to the varied interests of domestic and international tourists. Seasonal promotions, such as monsoon tourism or hill station getaways in summer, play a significant role in attracting travelers.

While Dubai positions itself as a global luxury and family-friendly hub, India relies on its cultural and wellness tourism appeal. Understanding these differences helps tailor marketing, partnerships, and offerings to the unique needs of each market. This dual approach allows Sharaf Travel to effectively tap into the potential of both destinations.



Data as of 2024; Source: Economic Times¹²⁴; India Tourism Data Compendium 2025, Ministry of Tourism¹²⁵; Gulf Today¹²⁶

HOSPITALITY TRENDS: INDIA-UAE



Homestays, Pangong Lake, India



Kalimpong, West Bengal, India

In India, hospitality invites you to wake up to misty hills, earthy homestays, and offbeat retreats where nature greets you at your doorstep. In the UAE, it's about sky-high suites, flawless service, and indulgent indoor luxury where every amenity is designed to elevate comfort and status.



5 Stars Living Infinity Pool Burj Khalifa View, Dubai



The Lana – Dorchester Collection in Business Bay
Source: The Lana – Dorchester Collection¹²⁷



Mandarin Oriental Jumeirah, Dubai
Source: Mandarin Oriental Jumeira, Dubai¹²⁸

MARKETING STRATEGIES: INDIA-UAE

Both India and the UAE are actively embracing modern marketing tools from digital campaigns to influencer-driven content to brand their nations as global tourism hotspots.

SOCIAL MEDIA CAMPAIGNS

India: #Dekhoapnadesh
UAE: #VisitDubai

INFLUENCER COLLABORATIONS

India: To showcase off beat locations
UAE: Showcase trending activations and experiences.

EVENT-LED TOURISM MARKETING

India: G20, Kumbh Mela
UAE: Dubai Shopping Festival, Global Village

Regional Tourism Branding: Distinctive Tourism Campaigns

INDIA

India's tourism marketing is decentralized by design, with each state specific initiatives crafting their own distinct identity and narrative. Campaigns like Kerala's 'God's Own Country' and Gujarat's 'Khushboo Gujarat Ki' showcase the diversity and cultural richness unique to every region.

UAE

Each emirate in the UAE runs its own tourism campaign such as 'Visit Dubai' or 'Visit Abu Dhabi' tailored to its unique offerings. Yet collectively, they align under a cohesive unified branding built around luxury, innovation, and exceptional global experiences.

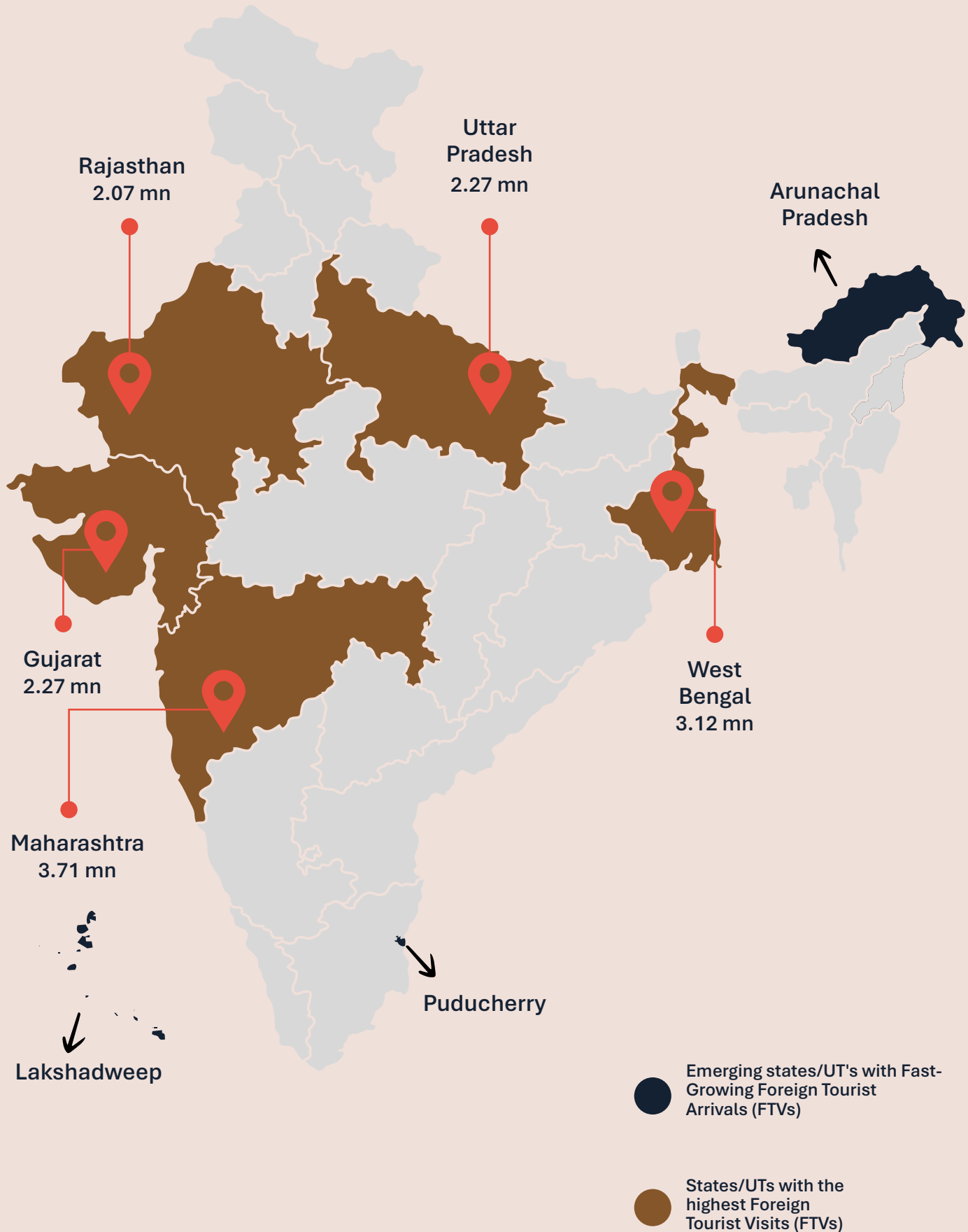


05

INDIA STATE WISE ANALYSIS

The state-wise tourism of India reflects a tremendous regional diversity, with each state providing unique cultural, natural, and spiritual experiences. States support national tourism from the heritage sites of Maharashtra to the eco-tourism of the Northeast states. This section provides a wider range of top and emerging destinations, state-led initiatives, and localized models that will create an inclusive and diverse approach to tourism in India.

FOREIGN TOURIST VISITS IN INDIA: EMERGING VS. TOP DESTINATIONS



*Foreign Tourist Visitors (All the data is in millions)
Source: India Tourism Data Compendium 2025, Ministry of Tourism¹²⁹

MAHARASHTRA

“Maharashtra – Unlimited”

Maharashtra, one of India's most vibrant states, offers an exceptional mosaic of tourist experiences across its distinct circuits. The Western Ghats and central Maharashtra host major tourist routes, while the Ajanta-Ellora circuit in the north and the Nagpur circuit in the east complete the state's tourism quadrant. The South Konkan circuit combines the pristine beaches of Malvan and Tarkarli with the refreshing Amboli hill station, coupled with the historic sea forts of Sindhudurg and Vijaydurg. From the cosmopolitan energy of Mumbai to the ancient cave wonders of Ajanta-Ellora, from the tiger reserves of Vidarbha to the coastal splendors of Konkan, this state's strength lies in its regional diversity.

ECO-TOURISM

Home to National Parks and flora and fauna in the Pench and Tadoba National Reserve that also are home to Tigers. Owing to its presence in the Western Ghats, it is home to many hill stations such as Lonavala, Matheran, Chikhaldara and Kaas Plateau

KEY SUCCESS FACTORS

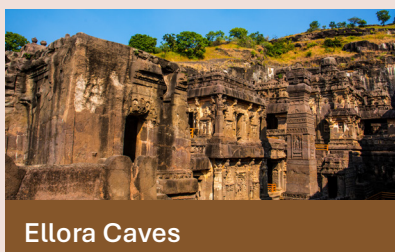
HERITAGE & CULTURAL TOURISM

Maharashtra stands out as the Indian state with the highest number of UNESCO World Heritage Sites.

- Ajanta Caves
- Ellora Caves
- Elephanta Caves
- Victorian Gothic & Art Deco Ensembles of Mumbai
- Chhatrapati Shivaji Maharaj Terminus (CST)



Ganesh Chaturthi Celebration



Ellora Caves



Monsoon Tourism



Gateway Of India

EVENT BASED TOURISM

“Ganesh Chaturthi”, a 10-day festival in August/September, celebrates the birth of Lord Ganesh, the god of wisdom and success. It is one of Maharashtra's grandest celebrations. In 2024, more than 2,500¹³⁰ Ganesh mandals were set up across the city of Mumbai only with the most famous Mandal “Laul Bagh cha Raja” having more than 1.5 million¹³¹ daily visitors.

GOVERNMENT INITIATIVES AND DEVELOPMENT

TOURISM POLICY 2024

Offers 20% capital subsidy, 100% State Goods and Services Tax (SGST) reimbursement,¹³² stamp duty & electricity duty waivers, plus single- window licensing for tourism investments.¹³³

CARAVAN TOURISM POLICY 2023

Under the Caravan Tourism Policy, recreational vehicles, camper vans, and motorhomes are permitted at beaches, forts, hill stations, mountain ranges, forests, and heritage sites, especially in areas where permanent structures aren't allowed or where accommodation options like hotels and resorts are limited.¹³⁴

#DISCOVERMAHARASHTRA DIGITAL + VR CAMPAIGN

Maharashtra Tourism Development Corporation (MTDC) is embracing digital innovation-including AI-guided tools and virtual reality experiences to promote sustainable and community-based tourism across the state.¹³⁵



1st

Foreign tourist Visits (2023)

3.71mn

FTAs as of 2024

Source: India Tourism Data Compendium 2025, Ministry of Tourism, Govt of India¹³⁶

CHANDRAPUR TIGER SAFARI PROJECT

₹580Cr project (US\$ 69.6 mn) (₹286Cr approved, fast-track push) to establish India's largest safari near Gorewada Zoo, themed global zones, children's park.

Source: Times of India¹³⁷

GUJARAT

“Khushboo Gujarat Ki” (The Fragrance of Gujarat)

The fifth largest state, Gujarat, is blessed with diverse natural, cultural, and geographical history. Stretched out into the Arabian Sea, with a hint of the desert and with a coastline of 1600 kms long is Gujarat. The state offers an abundance of experiences to tourists both natural and manmade, from the World’s tallest statue – Statue of Unity, the World’s only home for Asiatic Lions – Gir Forest, major centre for the Jains at Palitana and Girnar Hills to mesmerized Indus Valley Civilization – Dholavira, India’s first World Heritage City by UNESCO – Ahmedabad, World’s earliest known dock & India’s first port city – Lothal, and white desert – Rann of Kutch.

149.8 MN

Tourist visitors
2022-23



185.9 MN

Tourist visitors
2023-24

Reflects strong growth driven by industry, services, and rising investment in key sectors like tourism and manufacturing

Foreign tourist visits

One of the highest foreign tourist numbers

2.27

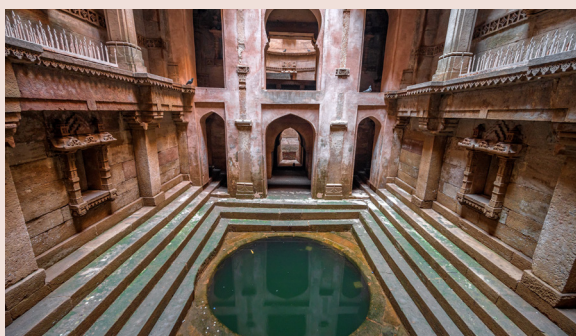
Million as off 2024

Source: Times of India¹³⁸

Source: India Tourism Data Compendium key highlights 2025, India’s Tourism Performance¹³⁹

HERITAGE TOURISM

Major attractions fostering cultural preservation and tourism growth.



Adalaj Stepwell in Gandhinagar



Rani ki Vav (Stepwell) in Patan, a UNESCO World Heritage site



The Sun Temple in Modhera

BUSINESS TOURISM

Owing to the presence of **GIFT City**, Surat Diamond Hub, high airport connectivity, port infrastructure, coupled with MICE (Meetings, Incentives, Conferences and Exhibitions), the state experiences high footfall in Ahmedabad, Surat, Vadodara and Rajkot.



Somnath Temple

KEY SITES

Somnath Temple, Dwarka Temple, Adalaj Stepwell, Rani Ka Vav, Modhera, Gir National Forest, Statue of Unity, Kutch, Dinosaur Fossil Park at Raioli (World’s third Largest Fossil Park)

Annual events that highlight the state’s attractiveness:

Rann Utsav is celebrated every year by Gujarat Tourism¹⁴⁰

BUDGET ALLOCATIONS, MARKETING & GOVT INITIATIVES

Under the SASCI (Special Assistance to States for Capital Investment) scheme (2024-25), Gujarat received funding for two major projects: an ecotourism site at Kerly receiving ₹99.50 crore (US\$ 11.61 mn) and a Tented City and Convention Centre at Dhordo receiving ₹51.56 crore (US\$ 6.02mn), aimed at boosting both domestic and international tourism in the state.

Source: Times of India¹⁴¹

Additional Projects in focus:

- Sea Border Viewing Project at Sir Creek, Kutch
- Dinosaur Fossil Park in Balasinor
- Development of Dharoi Dam
- Greater Gir Development Project
- Khushboo Gujarat Ki 2.0 campaign

RAJASTHAN

Incredible State of India

Rajasthan, India’s geographically largest state, known for being the “land of kings” serves as a major tourism hub, contributing to the state’s revenue. Multiple centuries of Rajput and Mughal architectural history are reflected in Rajasthan’s unique and well-preserved heritage including havelis, palaces and forts. Furthermore, the state’s rich cultural spectrum, which includes distinctive desert ecosystems, live folk arts and celebration create a multifaceted tourism offering.

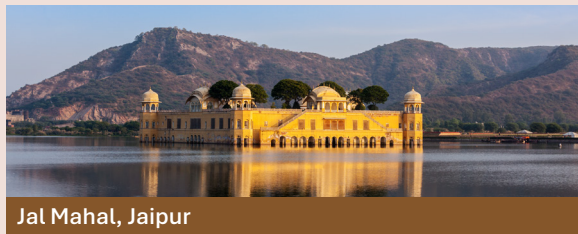
RAJASTHAN’S TOURISM POLICY 2025¹⁴²

Rajasthan’s 2025 Tourism Policy emphasizes on PPP-based tourism growth, single-window clearances, digital grading, and expanding in niche sectors such as astro-tourism, wellness, adventure, and cultural circuits, backed by tech features like 3D monument scans, VR, and interactive apps.

Tourism Contribution to Rajasthan’s GDP



Source: BW Hotelier¹⁴³



Jal Mahal, Jaipur



Rajasthani women drawing Mandana Rangoli



Mehrangarh Fort in Jodhpur

RAJASTHAN’S OFFERINGS

- Wildlife & Eco Tourism**

The State accounts for 3 national parks, 26 wildlife sanctuaries, 5 tiger reserves, 36 conservation reserves and 4 biological parks.¹⁴⁴

- Heritage Tourism**

The most prominent type of tourism in Rajasthan with majestic forts like the Amer fort and lavish palaces like the Hawa Mahal and Udaipur City Palace among many others, showcasing rich culture and history.

- Unique Stays**

Conversion of Heritage properties into hospitality units.

- Rural tourism**

Which includes the majestic Thar desert getaway, offering experiences like camel safaris, jeep adventures, cultural nights with folk dances and luxurious stays in desert camps along with authentic Rajasthani cuisine.

- Wedding Tourism**

Rajasthan emerges as a preferred wedding destination for Indian and international celebrities, with over 75% of India’s heritage properties. Rajasthan is well-known in this field, as seen by the magnificent locations found in cities like Jaipur, Jodhpur, Udaipur, and Jaisalmer. More than 120 properties frequently host destination weddings.¹⁴⁴

2.07Mn

FTA’s in 2024

Rajasthan is home to 9 UNESCO World Heritage Sites which include, Chittorgarh Fort, Kumbhalgarh Fort, Ranthambore Fort, Amber Fort (Jaipur), Jaisalmer Fort, Gagron Fort, Keoladeo National Park, Jantar Mantar and The Walled City of Jaipur (Parkota).

RAJASTHAN GOVERNMENT’S INITIATIVES

Global visibility has been significantly enhanced by the tourism department's frequent participation in major international travel marts events like ITB Berlin, FITUR in Spain, World Travel Market in the UK, JATA Tourism Expo in Japan, and IFTM Top Resa in France, leading to increased number of FTA’s. The Rajasthan Tourism Infrastructure and Capacity Building Fund has been launched with a budget of ₹5,000 crore (US\$ 671 mn) with a goal to improve tourism infrastructure.

As part of the Rising Rajasthan initiative, 1,329 MoUs have been signed in the tourism sector. As of Aug 2025, 1,320 investment proposals worth ₹100,675.96 crore (US\$ 1.12bn) have been approved. These are expected to generate approximately 2,04,297 job opportunities.

Other tourism initiatives established by the government to enhance investments into the tourism sector include **Asset Creation Incentives (ACI)**, a **100% exemption of Stamp Duty**, **Employment Booster** incentives, **Investment Subsidy (SGST Reimbursement)** of 75% of the State tax deposited for seven years, and a significant **Capital Subsidy** of 10-20% of the Eligible Fixed Capital Investment (EFCI).

Source: BW Hotelier¹⁴³, Rising Rajasthan¹⁴⁴

WEST BENGAL

The Sweetest Part of India

Flowing from the grand Himalayas to the vast Bay of Bengal, West Bengal is rich in scenic beauty, vibrant greenery, timeless heritage sites, and mouth-watering cuisine. It truly lives up to its title as India's sweetest treasure. Surge in international tourism is due to few of these key tourism niches.



3.12mn
FTA's in 2024

Top Destination For
Heritage Tourism
declared by UNESCO

Source: India Tourism Data Compendium 2025,
Ministry of Tourism, Govt of India¹⁴⁵

Cultural & Heritage Tourism

International Visitors are drawn to Kolkata's colonial architecture, Tagore's legacy in Shantiniketan, classical music in Bishnupur. West Bengal is home to 3 UNESCO World Heritage Sites namely **Darjeeling Himalayan Railway, Sundarbans National Park, Santiniketan.**

West Bengal has received 22 Geographical Indicator tags for food, agricultural products and art and handicraft products.

Eco & Wildlife Tourism

Sundarbans National Park, a UNESCO World Heritage Site, is the largest mangrove forest in the world. It is home to the Royal Bengal Tiger and a variety of wildlife. The region is a paradise for bird watchers with presence of a wide variety of resident and migratory bird species.

The Darjeeling Himalayan Terai region comprises of the Himalayan range in West Bengal. The region

- Consists of Darjeeling and Kalimpong district
- Scenic view of the majestic Kanchenjunga from Darjeeling

Tea & Plantation Tourism

Darjeeling, globally famous for its tea, attracts tourists for its scenic tea gardens, toy train rides, and cool climate.

Festival & Religious Tourism

Events like Durga Puja, Poush Mela, and Kolkata Literary Festival bring international artists, scholars, and cultural tourists to the state. 100 Religious circuits covering 400 destinations.

UNESCO has accorded the "Intangible Cultural Heritage of Humanity" tag to Kolkata's Durga Puja on December 15, 2021.

Road Ahead

West Bengal's tourism sector received investment proposals worth approximately ₹5,600(US\$ 0.6 bn) crore through MoUs signed at the Bengal Global Business Summit (BGBS) on 5-6 February 2025, in Kolkata, with 70 new projects planned for 2025-26, reflecting a significant rise in development activity within the state.

Source: Economic Times¹⁴⁶

West Bengal Incentive Scheme

West Bengal offers capital subsidies up to ₹1.75 crore (US\$ 0.2 mn) for micro and small tourism units to boost investment till 2025.

Source: Government Schemes¹⁴⁷

Homestay Tourism Policy 2017

Promote homestays to boost jobs, fuel economic growth, and give tourists a true taste of Bengal's culture and traditions.

Prospective Niche Segments of Tourism

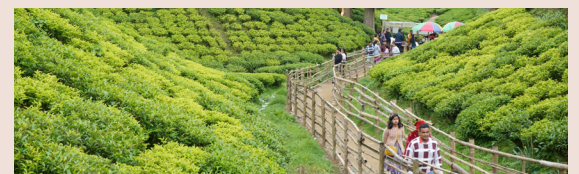
- MICE Tourism
- Religious circuit tourism
- Homestays/ Rural Tourism



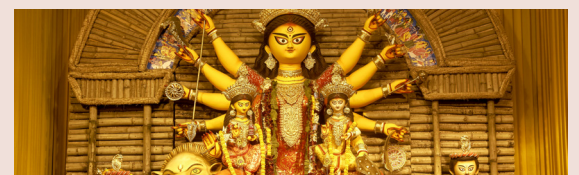
Victoria Memorial



Kanchenjunga from Darjeeling



Gopaldhara, Tea Garden



Durga Puja

UTTAR PRADESH

“UP Nahi Dekha, Toh India Nahi Dekha” – (If you haven’t seen UP, you haven’t truly seen India)

Uttar Pradesh, home to iconic sites like the Taj Mahal and Varanasi, offers a rich tapestry of heritage, spirituality, and culture. With growing infrastructure and promotional campaigns, it is emerging as a key hub for domestic and international tourism.

KEY SUCCESS FACTORS

HERITAGE TOURISM

- Uttar Pradesh is home to three UNESCO World Heritage sites: the Taj Mahal, Agra Fort, and Fatehpur Sikri.
- Lucknow is home to magnificent Mughal and colonial-era architecture, including the Grand Bara Imambara and the Rumi Darwaza.

RELIGIOUS TOURISM

Uttar Pradesh is a key religious tourism hub, attracting pilgrims to its sacred sites associated with Hinduism, Buddhism, and Jainism.

Key Sites include Ayodhya, Varanasi, Chitrakoot, Vindhyachal, Prayagraj, Naimisharanya, Gorakhpur, Mathura, Bateshwar Dham, Garhmukteshwar, Shukrtirtha Dham, Sarnath, and others.

ANNUAL EVENTS

- The Kumbh Mela, held every 12 years and the Mahakumbh Mela at Prayagraj, celebrated once every 144 years, are amongst the largest religious gatherings in the world.
- 2025 marked the year of Mahakumbh Mela, which attracted 66 crores+ (660 million) pilgrims as of 26 February 2025.

Source: Press Information Bureau, Government of India¹⁴⁸

During the Mahakumbh Mela at Prayagraj in early 2025:

20-30% ↑

Growth in the cities
Hotel and restaurant
industries

5-10% ↑

Increase in
hospitality sector
profits

Source: CNBC TV 18¹⁴⁹

Eco tourism Key Sites

Dudhwa National Park, Katerniaghat Wildlife Sanctuary, Pilibhit Tiger Reserve, Okhla Bird Sanctuary, Hastinapur Wildlife Sanctuary

GOVERNMENT INITIATIVES AND DEVELOPMENT

Religious Tourism

- INR 1,000 crore (US\$ 120 million)¹⁵⁰ have been earmarked for the project of 'Dharmarth Marg,' concerning the development of roads linked to religious and spiritual tourist centres.
- Acknowledging the increased footfall of devotees, the Finance Minister mentioned the expansion and beautification of the route from Shri Kashi Vishwanath Temple to the Ganges River.
- Development of Mathura-Vrindavan, Chitrakoot, Mirzapur through Braj Teerth Vikas Parishad (BTVP), Chitrakoot Teerth Vikas Parishad (CTVP), and Vindhyachal Dham Vikas Parishad (VDVP).

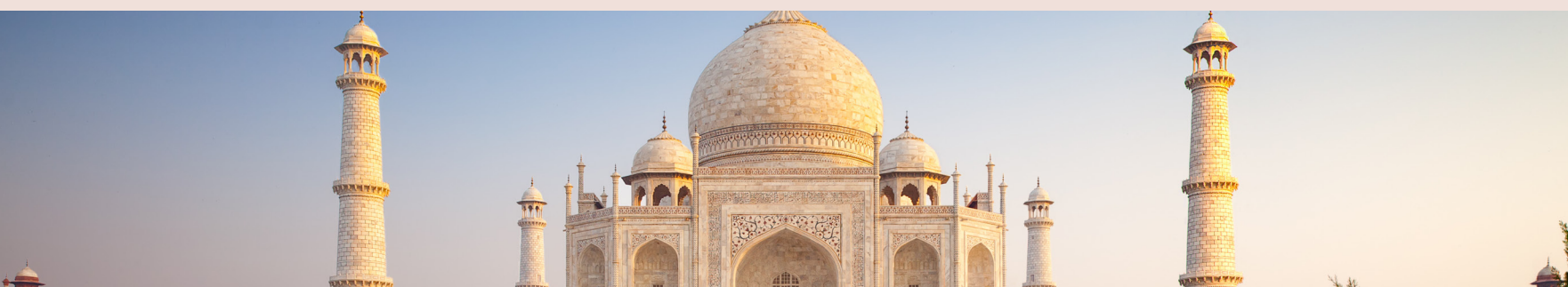
Infrastructure development

- Projects are underway at six locations anticipating a surge in tourists and devotees visiting the Shri Ram Janmabhoomi Temple in Ayodhya district, including widening and beautification of access roads.
- Development of Heliports in the PPP model in five tourist destinations of the state
- Redevelopment of Rahi Properties (tourist bungalows) through the PPP model.

Eco Tourism - Setting up of the Eco-Tourism Board for holistic development and promotion of Eco-Tourism Projects in the State in close coordination with the Forest Department

Cruise Tourism - The World's longest Cruise of 51 days from Varanasi (Uttar Pradesh) to Dibrugarh (Assam) is being facilitated for the promotion of Cruise Tourism in the State¹⁵¹

Night Safaris - First-of-its-kind night safari is set to come up in Kukrail in Lucknow with an outlay of ₹ 50 crore (US\$ 6 mn).¹⁵²

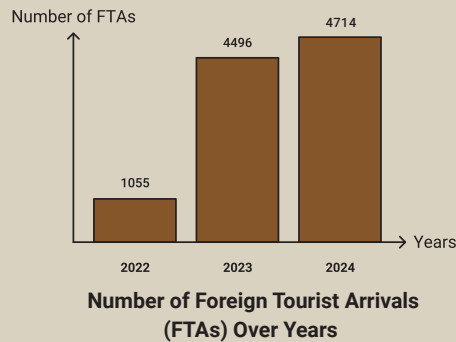


EMERGING STATES

ARUNACHAL PRADESH

Land of the Rising Sun

Popularly known as ‘Land of Dawn-lit-Mountains’, Arunachal Pradesh (Capital - Itanagar) is India’s remotest state and the first Indian soil to greet the rising sun. Located on the northeastern tip of India with its borders touching China, Bhutan and Burma (Myanmar), this beautiful land is endowed with dazzling array of flora and fauna that is sure to allure any tourist. More than 500 rare species of Orchids are found in the dense jungles of Arunachal. The state also prides itself on the availability of exotic species of mammals such as red panda, snow leopard, gaur, and takins. While there are documented evidence of close to two hundred species of indigenous and migratory birds being found in the state, some ornithologists claim that this figure in reality may be more than four hundred.



Reflecting on the boost the government has taken initiatives like-

- **New tourism Policy & logo as of 2025**¹⁵³
This policy aims to promote adventure, tribal, wellness, spiritual, farm, and even wine tourism-marking a regional first-while also developing MICE and border tourism.
- Launching spiritual and pilgrimage journeys, developing Ayush-based healing therapies, showcasing rich agricultural heritage and more.

Source: Ministry of Tourism India¹⁵⁴, Travel Trends Today¹⁵⁵

KEY INITIATIVES

- Kiwi Owing and Kiwi Fruit Picking Experience" in Ziro, Lower Subansiri district as a part of their new Tourism Policy, the Arunachal Kiwi Mission.
- **Film tourism** - Inviting filmmakers to explore the state's scenic beauty for movie shoots, and wine tourism.
- **Homestay policy** to ensure visitors have an authentic and holistic experience, staying with locals and gaining insight into the region's tribal communities.
- Leveraging its strategic location bordering Myanmar, Tibet, and Bhutan, the state, in partnership with the Indian Army, is developing border villages under the Vibrant Village Programme to boost sustainable tourism. It is aligned to the state's potential for adventure tourism, from trekking in pristine landscapes to river rafting.

Skill Development

The government aims to identify skill gaps, partner with Indian Institute of Tourism and Travel Management (IITM) and Institute of Hotel Management (IHM) for training, and introduce tourism management courses in state institutes to align talent with industry needs.¹⁵⁷

Global Visibility

- Digital and offline marketing campaigns
- Social media engagement
- Event-based promotions to showcase tourism offerings



Parshuram Kund, Lohit River



Mechuka, Arunachal Pradesh, Best Mountain destination award at the India Today Tourism awards 2025

Source: travelandtourworld¹⁵⁶

PUDUCHERRY

The French Riviera of the East

Puducherry, a serene seaside town on India's southeast coast, blends French colonial charm, Tamil culture, and spiritual depth. Just 162 km south of Chennai, its tree-lined boulevards, colonial architecture, and tranquil seafront reflect a timeless elegance. Fondly known as Pondy, it's home to the Sri Aurobindo Ashram, vibrant cafes, and a unique fusion of East and West that makes it truly unforgettable.

KEY SUCCESS FACTORS



Basilica Church



Auroville



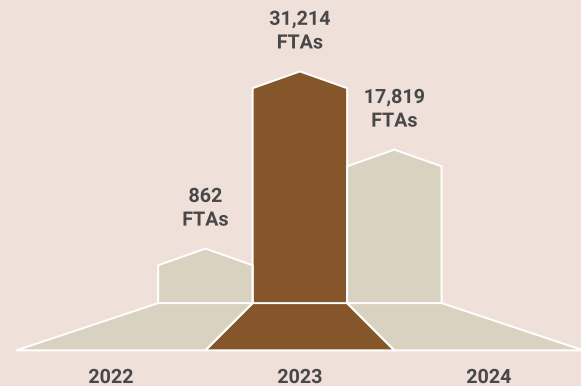
Puducherry's unique blend of French colonial heritage and Tamil culture offers rich historical and cultural experiences

Spiritual centers like Sri Aurobindo Ashram and Auroville, and scenic beaches (Blue Flag certified) attract wellness and nature tourists.

Diverse cuisine and a vibrant café culture, along with global recognition, enhance its appeal to international visitors.

PUDUCHERRY'S TOURISM VISION 2047:

By 2047, transform Puducherry into a premium tourism hub through robust policies, sustainability, digital innovation, strong branding, and community-driven growth. The focus is on class over mass tourism, with private sector leadership and inclusive development.¹⁵⁸



GOVERNMENT INITIATIVES

Marine Tourism - Infrastructure Initiatives

“Pondy – Necklace” Eco-Tourism Initiative

- The Pondy Necklace, a necklace-shaped island-lagoon in Thengaithittu, Puducherry, is part of a 2024 initiative to develop a sustainable, heritage-rich waterfront tourism circuit by connecting key sites via an eco-friendly boating circuit.

Cruise Terminal Construction

- Development of a full-scale cruise terminal to boost maritime tourism.
- In 2025, Puducherry is planned to become a key stop on the luxury MV Empress cruise route, boosting coastal tourism and local employment opportunities.¹⁶⁰

LAKSHADWEEP

A Hundred Thousand Islands

Lakshadweep, India's smallest Union Territory, is a stunning archipelago of 36 coral islands, atolls, and reefs nestled in the Laccadive Sea, 200–440 km off India's southwest coast. Known for its pristine beaches, turquoise lagoons, and lush landscapes, it offers a perfect escape into tropical serenity. With just 10 inhabited islands and the rest untouched, gems like Bangaram Island are being developed as premium international tourist destinations. The name "Lakshadweep" means "a hundred thousand islands", reflecting its vast oceanic beauty.

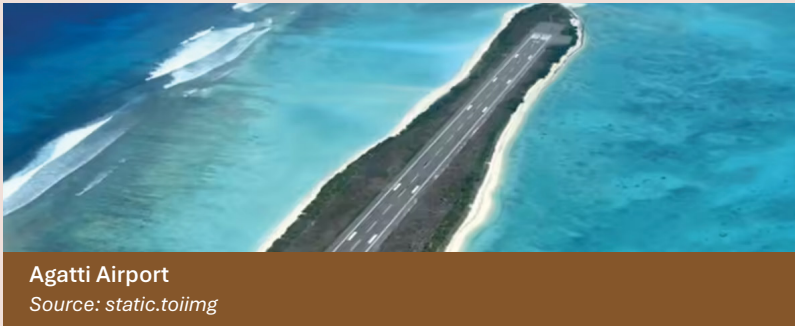
KEY SUCCESS FACTORS

Sustainable Development Focus

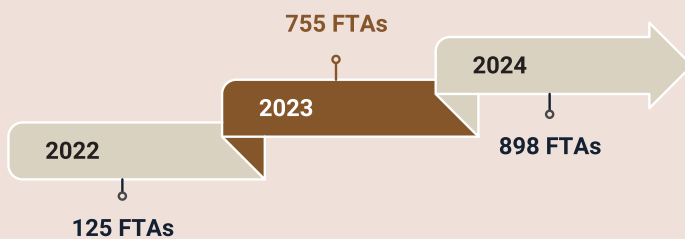
This project appears to be one of the biggest projects of the next few years. The National Tourism Strategy 2031 grew from the cooperation between Ministry of Economy and various local and federal entities and institutions.

Promotion of Non-Intrusive Water Sports

- Encouragement of eco-friendly activities such as scuba diving, snorkeling, kayaking, canoeing, windsurfing, and water skiing ensures tourism without damaging marine ecosystems.
- Establishment of a Water Sports Institute at Kadmat Island reflects a structured approach to promoting adventure tourism responsibly.



Agatti Airport
Source: static.toiimg



Growth in Foreign Tourist Arrivals (2022-2024)¹⁵⁹

Luxury Tourism with Controlled Footprint

Signing of two Taj hotels on Suheli and Kadmat islands in 2023 introduces premium hospitality without mass commercialization.



Scuba Diving In Kavaratti, Lakshadweep

Source: Trawell¹⁶¹

Connectivity

- **Improved Connectivity:** Lakshadweep is accessible by both ships and airplanes from Kochi, with a daily direct Alliance Air flight to Agatti enhancing ease of travel.
- **Growing Tourist Arrivals:** Agatti Island experienced a significant 40%¹⁶² increase in passenger movements from 2021/22 to 2022/23, indicating rising tourist interest.
- **Cruise Tourism:** The presence of a cruise line from Mumbai to Kochi and onwards to Lakshadweep adds a unique and upscale mode of arrival for tourists.
- **Inter-Island Mobility:** Availability of boats and helicopters for inter-island travel facilitates exploration within the archipelago.

GOVERNMENT INITIATIVES AND DEVELOPMENT

Kochi-Lakshadweep Islands Submarine Optical Fiber Connection (KLI-SOFC) Project¹⁶³ In January 2024, Prime Minister Narendra Modi inaugurated the Kochi-Lakshadweep Islands Submarine Optical Fiber Connection (KLI-SOFC) project, boosting digital infrastructure with faster, more reliable internet.

Swadesh Darshan 2.0 Under **Swadesh Darshan 2.0**, Lakshadweep is among 57 destinations set for development, and for sustainable tourism and infrastructure upgrades to boost its appeal as a premier destination.¹⁶⁴



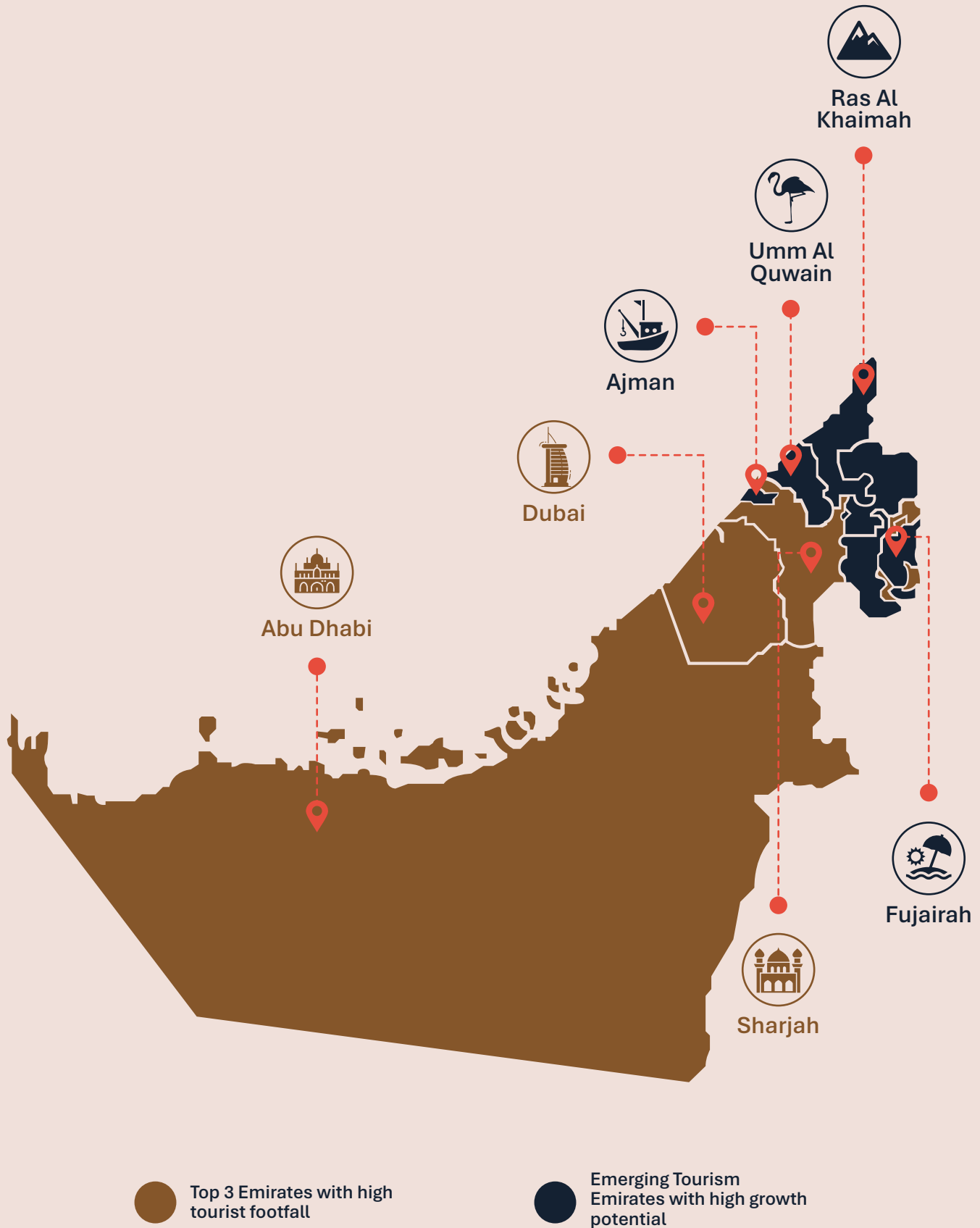


06

UAE - EMIRATE WISE ANALYSIS

Through Emirate-Wise Analysis, this section points out the advantages of the tourism sector within Abu Dhabi with culture and heritage, Dubai with leisure and entertainment, Sharjah with culture and arts, and the northern emirates with eco, adventure, and coastal tourism. Together, they form an integrated tourism ecosystem that reflects the UAE's strategic vision and global appeal.

FOREIGN TOURIST VISITS IN UAE: EMERGING VS. TOP DESTINATIONS



ABU DHABI

Abu Dhabi, the capital of the United Arab Emirates, has emerged as a global tourism hub by seamlessly blending its deep-rooted heritage with futuristic attractions. Once home to 300 Barasti (palm frond) huts, a few coral buildings and the Ruler's fort, today, the bustling high-rise capital of the UAE is a melting pot of culture, history, heritage, nature, beaches, luxury, wildlife and shopping. The Department of Culture and Tourism – Abu Dhabi (DCT Abu Dhabi) reported,

1.4 mn

Overnight guests
Q1 2025

US\$ 0.63 bn

Hospitality sector
revenue Q1 2025

79%

Hotel Occupancy
Rates Q1 2025

US\$ 16.9bn

Goal of contribution to
local economy
through tourism – for
2025

Abu Dhabi also plans to boost the tourism sector's contribution to its GDP to 12 per cent by 2030, from 5 per cent in 2023

Source: UpperSetup¹⁶⁵; The National News¹⁶⁶

CULTURE AND HERITAGE

- Sheikh Zayed Grand Mosque
- Abu Dhabi's cultural museums, including the newly opened teamLab Phenomena, alongside the Louvre Abu Dhabi, Zayed National Museum, and the Natural History Museum Abu Dhabi, in strengthening the emirate's tourism offering.
- Saadiyat Cultural District a visionary hub designed to position Abu Dhabi as a global center for culture, creativity, and dialogue.

NATURE AND ADVENTURE

- Sir Bani Yas Island, a wildlife sanctuary, allows visitors to see free-roaming giraffes, cheetahs, and Arabian oryx.
- Kayaking through Abu Dhabi Mangroves.
- Al Ain Oasis (UNESCO listed) is a sprawling 1,200-hectare haven of nature and history.
- Dune Bashing through Liwa Oasis.

ENTERTAINMENT AND LEISURE

- Yas Island, a vibrant entertainment district.
- Home to Ferrari World Abu Dhabi, the world's first Ferrari-branded theme park.
- Warner Bros. World; Yas Waterworld; and the Yas Marina Circuit, which hosts the annual Formula 1 Etihad Airways Abu Dhabi Grand Prix.
- CLYMB Abu Dhabi, world's tallest indoor skydiving flight chamber



Yas Island



Warner Bros

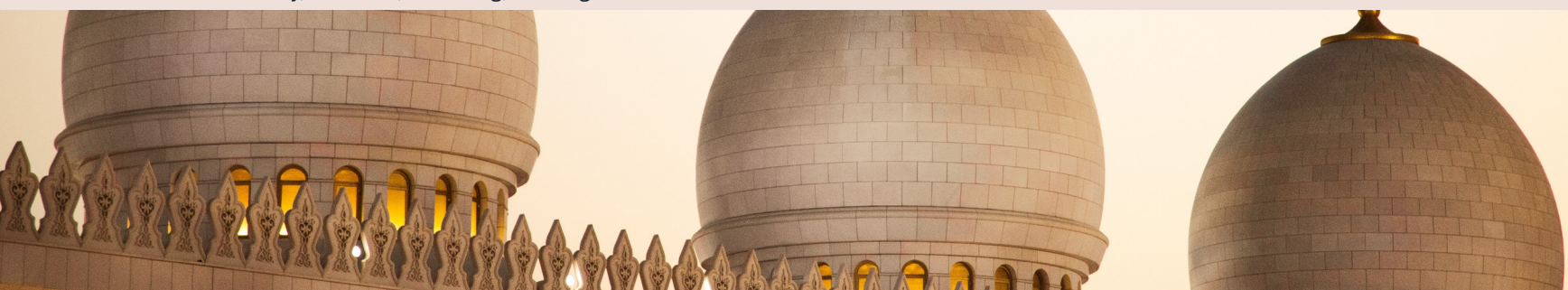


Louvre Museum

Abu Dhabi's Tourism Strategy 2030 continues to chart a bold course for growth, aiming to attract 39.3 million visitors, create 178,000 new jobs in the tourism sector, and contribute AED 90 bn (US\$ 24.51 bn) to the GDP by 2030.¹⁶⁷ These goals aim to be achieved through 25 targeted initiatives across the strategy's four key pillars: offering and city activation, promotion and marketing, infrastructure and mobility, and visa, licensing, and regulation.

EXCITING NEW PROJECTS

- Harry Potter World at Warner Bros. World
- Saadiyat Cultural District completion by 2025
- Hudayriyat Island as a sports & adventure hub
- Expansion of Yas Waterworld
- Construction of Disney World Abu Dhabi





teamLab Phenomena Abu Dhabi, is a massive 17,000 sq. m. multi-sensory art museum located at Saadiyat Cultural District. The space offers a mind-blowing expedition that is different for each visitor and changes every time you visit.
Source: teamLab Architects



Zayed National Museum, located at the heart of Saadiyat Cultural District Abu Dhabi, celebrates the rich history, culture and stories of its people from ancient times to modern days. The museum honors the life and values of UAE's Founding Father, H.H. Sheikh Zayed bin Sultan Al Nahyan.
Source: Zayed National Museum

DUBAI

Dubai, a global city known for its rapid transformation from a modest fishing village to a thriving international hub. Nestled along the Arabian Gulf, it is celebrated for its futuristic skyline, luxurious lifestyle, and pioneering infrastructure. From the historic Al Fahidi Fort to the world's tallest building, the Burj Khalifa, Dubai seamlessly blends tradition with innovation, offering a dynamic cultural and economic landscape.

MUST VISIT LOCATIONS IN DUBAI

1. Burj Khalifa: Observation decks and stunning views
2. Dubai Mall: Shopping, dining, and entertainment Dubai
3. Marina: Waterfront activities and dining
4. Al Fahidi Neighborhood: Historical insights and culture

WHAT MAKES DUBAI SO FAMOUS?

- Luxury hotels and resorts
- High-end shopping and designer fashion
- Active nightlife and entertainment options
- Gold jewelry with intricate designs
- Premium perfumes and spices
- Multi Cuisine dining experiences
- Latest electronics
- Tax-free shopping opportunities

15%

Contribution to Dubai's real GDP from hospitality and transport sectors, strongly supported by tourism in H1 2024

9.88 mn

International overnight visitors across the first six months of 2025

Source: Emirates NBD Research¹⁶⁸, TTE Gulf¹⁶⁹

D33 AGENDA

A major objective of the 'D33' Agenda is to make Dubai one of the top three global destinations for visitors across leisure, business and specialized services. The 'D33' agenda also aims to enhance the city's position as a fast-growing, attractive business hub with world-class quality of life and the highest levels of security and safety for Dubai's citizens and residents.

The Department of Economy and Tourism has collaborated with popular personalities like J. Balvin and Mr. Beast to create engaging content and reach a wider audience, according to Dubai Tourism.

Dubai has launched global campaigns, such as "Dubai: A Whole New You" and "Dubai: Who's Ready?", featuring prominent actors and leveraging their fan bases to promote the city.¹⁷⁰

Private Partnerships to promote Dubai as a Tourism hub.

Huawei - The partnership connects SkyTone with Dubai Tourism to enhance Chinese tourists' experience in the city.

Real Madrid - Exciting activations, unique experiences, and special moments for Dubai and Real Madrid fans.¹⁷¹



Burj Khalifa, Dubai

Source: Visit Dubai



Atlantis, The Palm, Dubai

Source: Kerzner

NATURAL GETAWAYS IN DUBAI

A snapshot of Dubai's nature-driven tourism experiences.



Dubai Desert Conservation Reserve
-225 sq. km protected area¹⁷²



Ras Al Khor Wildlife Sanctuary
-Home to 450 species of flora and fauna¹⁷³



Hatta Lake
-One of Dubai's top Spots for Kayaking¹⁷⁴



Mr. NISHANT PITTI

Co-Founder of EaseMyTrip
EaseMyTrip - Founding Member of UIBC-UC

"EaseMy Trip's association with marquee events like IIFA 2024 as the official travel partner talks about our commitment to enhancing the travel ecosystem. Tourism projected to account for 12% of UAE's GDP in 2024, and with Dubai recording 17 million international overnight visitors last years, including 2.46 million from India, our differentiation lies in understanding the nuanced preferences of cosmopolitan travelers. Our meticulously crafted packages combine luxury, adventure, and cultural exploration, setting us apart from conventional travel platforms. By focusing on innovation, sustainability, and personalization, EaseMyTrip is proud to contribute to Dubai's tourism growth and ensure memorable travel experiences for our customers."

SHARJAH

Sharjah, known as the cultural capital of the UAE, offers a rich blend of heritage, art, and natural beauty. It is the third largest of the seven emirates that make up the United Arab Emirates (UAE) and is the only one to have land on both the Arabian Gulf Coast and the Gulf of Oman.

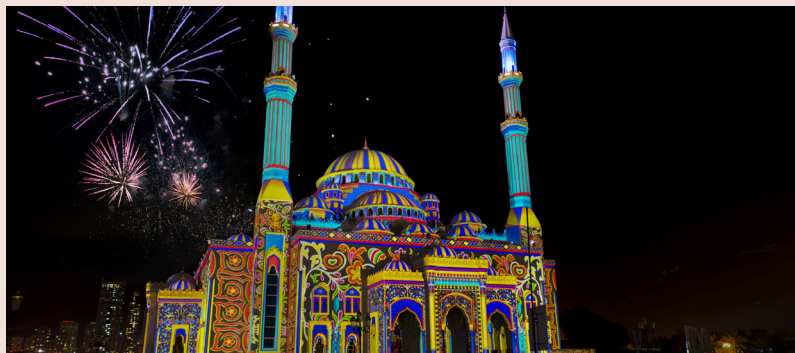
It is an emirate of contrasts where visitors can enjoy a holiday in the sun, discover traditional markets (souqs) or visit modern shopping malls, explore the many heritage sites and museums, admire the majestic mosques, stroll around the lagoons, and experience the natural beauty of true Arabian deserts, mountains and sea.

Sharjah Tourism Main Indicators - 2023 vs. 2024

KEY PERFORMANCE INDICATORS

Guest	Occupancy Rate%
1.68 mn ▲ 11%	69% ▲ 3%
Total Revenue	RevPAR
AED 650 mn ▲ 13% (US\$ 177 mn)	AED 163 ▲ 12% (US\$ 44.38)

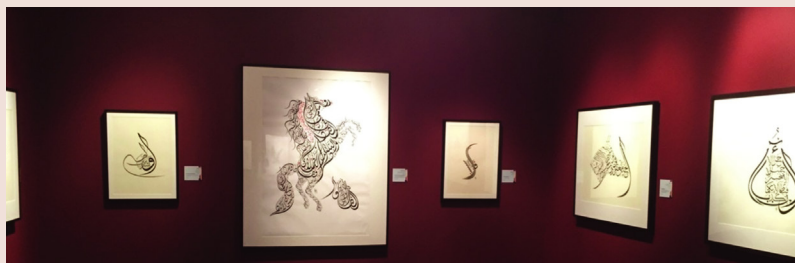
Source: Sharjah Commerce and Tourism Development Authority Report 2024.¹⁷⁵



Sharjah Light Festival

CULTURE AND HERITAGE

- **Sharjah Mosque** - It occupies 185,806 square meters with a capacity to accommodate over 25,000 worshippers.
- **Sharjah Art Museum** - One of the largest art museums in the region, focusing on contemporary and classical Arab art.
- The **Heart of Sharjah** is a heritage restoration project that revitalizes Sharjah’s historic district by preserving traditional architecture and culture.
- **Sharjah Calligraphy Museum** is the only museum in the Arab world devoted entirely to calligraphy.
- UNESCO-identified **Mleiha Archaeological Centre**.



Sharjah Calligraphy Museum

Source: triphock¹⁷⁶

EVENT BASED TOURISM APPROACH

F1H2O UIM WORLD CHAMPIONSHIP.

The F1H2O Grand Prix of Sharjah is the flagship international series for single-seater, inshore, Formula 1 power boat racing.

SHARJAH INTERNATIONAL BOOK FAIR

This event is one of the world’s largest book fairs,¹⁷⁷ held at the Sharjah Expo Centre every year. The 11-day fair has over 400 literary events, including daily writing workshops, poetry readings and book signings.

SHARJAH HERITAGE DAYS

Features cultural activities, talks and performances that shed light on the traditions of UAE culture

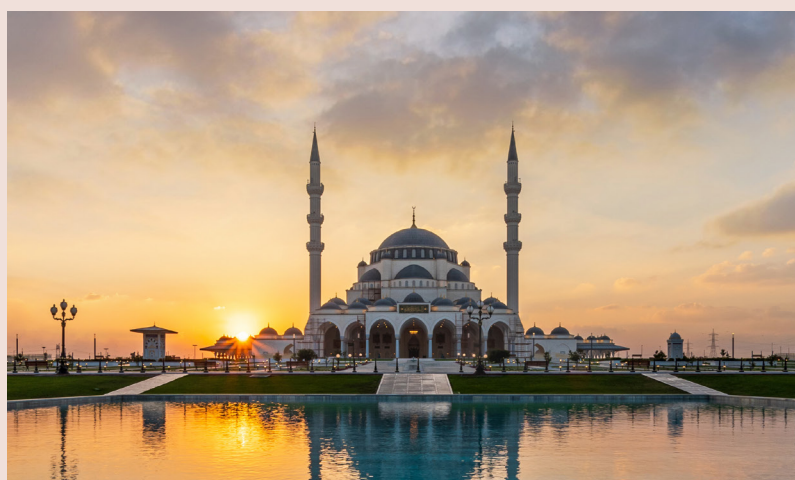


Al Majaz Amphitheatre

Source: Almajaz amphitheatre¹⁷⁸

NATURE AND WILDLIFE

- Sharjah Desert Park
- Desert Safari to Fossil Park
- The Khor Kalba Mangrove Centre
- Al Hefaiyah Mountain Conservation Centre
- Al Rabi Hiking Trail - Khorfakkan



Sharjah Mosque



H.H. Sheikh Dr. Sultan bin Muhammad Al Qasimi, Supreme Council Member and Ruler of Sharjah with Shri Pinarayi Vijayan, Hon. Chief Minister of Kerala and Mr. Navdeep Singh Suri, Former Ambassador of India to the UAE, during his official visit to Kerala in September 2017.
Source: Emirates News Agency



The Sharjah Museum of Islamic Civilization located on the Corniche, just north of the Heart of Sharjah district, features seven galleries spread over two levels covering aspects ranging from Islamic faiths and achievements to Islamic arts and crafts.
Source: Visit Sharjah



The Cultural Square, located to the east of the old city centre, Sharjah, is a symbol of spirituality and UAE culture, featuring a 14-metre high pedestal with a sculpture of the Holy Quran. The square also has the Cultural Palace, a place for concerts and events.
Source: Visit Sharjah



The Sharjah Art Foundation, founded in 2009 by H.H. Sheikha Hoor Al Qasimi is a vital resource for artists and cultural organizations in the Gulf with a deep commitment to foster Sharjah's culture and heritage via year-round exhibitions, performances, screenings and educational programmes.
Source: Visit Sharjah

EMERGING EMIRATES



H.H. Sheikh Saud bin Saqr Al Qasimi, Ruler of Ras-al-Khaimah, during Indian Republic Day celebrations in RAK in January 2025.
Source: Emirati Times



From left to right: H.E. Satish Kumar Sivan, Consul General of India to Dubai & Northern Emirates, Maj. Gen. Sharafuddin Sharaf, Vice-Chairman of Sharaf Group and UIBC-UC, H.H. Sheikh Saud bin Saqr Al Qasimi, Ruler of Ras-al-Khaimah, Shri Uday Samant, Hon. Minister of Industries & Marathi Language, Maharashtra, Shri P. Velrasu, CEO of MIDC and H.E. Mohammed Ali Musabbah Al Nuaimi, Chairman of RAK Chamber during MoU signing between UIBC-UC and Maharashtra Industrial Development Corporation (MIDC), Government of Maharashtra to enhance investment and business, in January 2025.

Source: UIBC-UC

“

“Ras Al Khaimah enjoys a rich history from the mountains to the sea, green valleys to golden dunes. There is a lot of uniqueness within the emirate where we have the mountains, beach, parks all in a distance of 30 minutes. Tourism is our fastest growing industry...We want to become an authentic destination and sustainability will be the heart of it all.”

H.H. Sheikh Saud bin Saqr Al Qasimi

Ruler of the Emirate of Ras Al Khaimah and Member of the UAE Supreme Council

”

RAS AL KHAIMAH

From breathtaking natural landscapes including pristine beaches, lush mangrove forests, vast terracotta desert dunes, and the rugged Hajar mountains, this emirate has become one of the most sought-after tourist destinations in the country. Home to Jebel Jais, the UAE's highest peak, this Emirate offers dramatic mountain vistas and cooler temperatures, around 10 degrees lower than sea level.

1.28 million

Visitors in 2024, highest recorded number

3.5 million

Visitors by 2030

Source: Ras Al Khaimah Tourism Development Authority¹⁷⁹

RAK is an exciting destination for Indian weddings and MICE events. The tourism department announced free visas for Indian MICE groups in 2024.

MAJOR TOURIST DESTINATIONS:

1. Jebel Jais – The highest mountain in the UAE is part of the spectacular cloud-piercing Al Hajar mountains.

2. Al Marjan Island – This is the first man-made archipelago in the emirate and has 4 coral- shaped islands with 7.8 kms of pristine sandy beaches. It is also home to world-class hotels and resorts.

3. Adventure Activities – This emirate offers adrenaline fueled activities like the Jais Sky Tour, hot air balloon activities, and aerobatic flight experiences.

4. Corniche Al Qawasim – This 3 km long waterfront promenade is lined with luxury apartments and shopping centers, while also providing views of white sandy beaches and flamingo inhabited mangroves. It is also home to the 37 m Ferris wheel, RAK eye.

5. Luxury Stays – It is home to the largest Hampton hotel in the world with 515 guestrooms, the 5-star Movenpick Resort with 300 m long white sandy beaches, the Ritz Carlton, and the Radisson resort. Additionally, the upcoming Wynn Al Marjan casino is set to elevate the luxury entertainment scene in Ras Al Khaimah.

GOVERNMENT INITIATIVES

Focus on Sustainable Growth: RAK Government has committed to **invest AED 500 million** to develop 20+ sustainable tourism projects, including eco-lodges on Jebel Jais.

Source: *Business Traveller*¹⁸⁰

Event Based Tourism: Ras Al Khaimah hosts over **50 tourism- focused events** annually, including the RAK Art Festival and the Ras Al Khaimah Championship, enhancing the emirate's vibrant visitor experience.

Source: *Ras Al Khaimah Tourism Development Authority*¹⁸¹



Jebel Jais



Jais Sky Tour

Ras Al Khaimah is the first destination in the Middle East to earn EarthCheck Silver certification, a global benchmark for sustainable tourism covering energy, water, waste, emissions, and community impact.

Source: *Ras Al Khaimah Tourism Development Authority*¹⁸²



Wynn Al Marjan Island Resort in Ras Al Khaimah, opening in Spring 2027, will boost tourism as a luxury 60-hectare beachside destination featuring rooms, villas, a casino, restaurants, a spa, an event centre and a theatre.



Taj Wellington Mews, an upcoming 5-star living experience in Al Marjan Island, Ras-al-Khaimah
Source: Luxhabitat



Anantara Mina Al Arab Ras-al-Khaimah Resort
Source: Anantara

UMM AL QUWAIN

A peaceful coastal escape, Umm Al Quwain blends natural beauty, rich heritage, and family-friendly fun. From ancient sites to pristine beaches and mangroves, it's the ideal getaway for those seeking relaxation and adventure away from the city buzz.



Snoopy Island – Known for water sports



Al Sinniyah Island¹⁸³

NATURE & ISLANDS

Al Sinniyah Island is a peaceful nature reserve with dense mangroves and wildlife like flamingos and herons, offering a rare glimpse of the UAE's natural beauty.

Al Harmala, Al Chewria, and Al Humaida are islands located in Umm Al Quwain. These islands are known for their mangrove forests and rich biodiversity.

ADVENTURE & FUN

UAQ Marine Club - Offers activities like boat berthing, raft building, houseboat, fishing and more.¹⁸⁴

Dreamland Aquapark - An oasis of palm trees and thrilling water rides.

Zoo wildlife Park - Interact and feed animals like lemurs, goats and spot animals like tigers and giraffes.

HERITAGE AND HISTORY

Umm Al Quwain Fort & National Museum Ed-Dur Archaeological Site - UAE's Largest archaeological digs.

Falaj Al Mualla Fort - 19th Centaury Oasis Fortress.

Old Town & Dhow Yard - Historic streets & coral-stone homes.

SPORT AND EVENT TOURISM

Emirates Motorplex - The club organizes drag races and car shows in addition to other car-related activities.¹⁸⁵

Camel Racing at Al Labsa - This traditional sport is given a modern hi-tech twist by having robot jockeys ride the camels.¹⁸⁶

UPCOMING PROJECTS

- **Downtown Umm Al Quwain:** New Launch Set to Welcome 150,000¹⁸⁷ Residents, in partnership with Sobha Realty.
- **UAQ Eco Trail** - UAE To Soon Get First Ecotrail In The UAQ Mangrove Reserve – With Glowing Geckos, Dune Paths & More.¹⁸⁸
- **Luxglamp's first Eco Tourism Dome Stay**



FUJAIRAH

Fujairah's historical importance goes back to 3000 B.C. when the area was inhabited by herders and fishermen. It was then named the Land of Titans or 'Ard Al Jababerah' and today it is unofficially called 'the Jewel of the Middle East'. The emirate has also placed significant importance on tourism in the past few years. As of November 2023, Fujairah planned to double the number of visitors to its archaeological sites, aiming to reach half a million¹⁸⁹ visitors. The emirate earlier recorded nearly 113,000 visits to its top seven archaeological sites in 2022-23.



Sheikh Zayed Mosque, 2nd Largest mosque in the UAE



Al Bidya Mosque, Oldest Mosque in the UAE
Source: Fujairah Tourism¹⁹⁰



Wadi Al Wurayah, Included in the UNESCO's World Network of Biosphere Reserves, Spans over 192 sq kilometers.



Fujairah's hiking landscape
Source: Travel Dubai¹⁹¹

GOVERNMENT INITIATIVES

As a part of Fujairah Plan 2026, initiatives, such as the Fujairah Adventure Park, aim to bolster adventure tourism through high-quality events and collaborations with international organizations.¹⁹²

PARTNERSHIP MODEL

- **Ras Al Khaimah** Tourism Development Authority and Fujairah Adventures have signed an MoU to launch the UAE's first-ever cross-emirate hiking trail, seamlessly linking Ras Al Khaimah's mountains and Fujairah's wadis, coastal routes, and heritage paths for an integrated, multi-day adventure experience.
- **Abu Dhabi x Fujairah** (Signed by H.E. Saood Abdulaziz Al Hosani, Undersecretary of Department of Culture and Tourism (DCT) Abu Dhabi, and H.E. Saeed Al Samahi, General Director of Fujairah Tourism and Antiquities Department)¹⁹³



Boost Museum Visitation
Through joint marketing, artefact exchanges, and shared cultural programming to attract more local and international tourists.

Enhance Knowledge & Capacity
By exchanging expertise and launching collaborative training programs to strengthen museum operations in both emirates.

Promote Cultural Heritage & Tourism Growth
Supporting national identity, cultural appreciation, and long-term tourism-driven economic development aligned with Abu Dhabi's Tourism Strategy 2030.



AJMAN

The city of Ajman is the coastal capital of the emirate and is situated between the emirates of Umm Al Quwain and Sharjah. Ajman has a beautiful 16-kilometre stretch of beach along the Arabian Gulf, along with mangrove forests and a natural harbor. Museums, souqs and traditional past-times like camel racing provide a cultural fix, while the new Al Zorah development offers world-class golfing. In 2023, Ajman’s international tourist numbers increased by 29%¹⁹⁴ as compared to 2022.

MAJOR TOURIST DESTINATIONS:

- 1. Al Zorah Nature Reserve** – With 1 million sq m of natural mangrove forests, this reserve is home to 58 species of birds. It also has 7 kms of waterfront and 2 kms of beaches with tidal creeks, perfect for water adventure activities.
- 2. Culture and Heritage** – Visiting the souqs and camel races provide a glimpse into Emirate culture in the region. Visiting the Ajman museum, Masfout castle, Hassa Buweid and Al Manama give a deeper dive into the long history of the region.
- 3. Hajjar Mountains** – The wadis and rocky terrain here provide ample adventure activities including hiking trails to witness the views from the peak of the mountains. The terrain also allows for cycling and mountain biking on the trails.



Al Zorah, Ajman



Traditional Souqs, Ajman

Ajman Motor Festival

An annual month-long show displaying super cars, modified cars and motorcycles.

Liwa Ajman Dates and Honey Festival

Highlights the significance of palm trees and dates and promotes sustainability of the heritage and agricultural sectors.

Festival of Folklore Strings

Highlights the heritage of Ajman and showcases Emirati folk performances like Al-Ayyala and Al-Yawla.

GOVERNMENT INITIATIVES

Ajman Tourism has launched two Emirati-crafted tourism experiences¹⁹⁵ to boost local tourism:

- **The Masfout Cultural Immersion** offers a two-day experience showcasing nature, heritage, and local life.
- **The Empowerment program** promotes community involvement and cultural preservation through tourism.

International Outreach Strategy – Global Representation

- Ajman Tourism’s German Roadshow (May 2025)¹⁹⁷
- Tourism Tour in the UK (Feb 2025)¹⁹⁸
- Participation at the World Travel Market (WTM) London. (Nov 2024)¹⁹⁹
- Promotional tour to China (Oct 2024)²⁰⁰

AJMAN VISION 2030¹⁹⁶

Increase spending on leisure activities by 200%

Increase culture and sport participation by 400%

Increase public beaches by 300%



Masfout Museum, Ajman

Source: Visitajman.ae

SUMMARY OF STATE-WISE AND EMIRATE-WISE ANALYSIS

INDIA	UAE
<p>Each state leverages unique strengths: from Gujarat's cultural heritage and coastal assets to Maharashtra's UNESCO sites and festival tourism, Uttar Pradesh's religious and heritage circuits, Delhi's Mughal and colonial landmarks, and West Bengal's mangrove and tea-garden experiences. Puducherry is backed by airport upgrades, beach restoration and eco-tourism, and Lakshadweep with allocations driving sustainable resort partnerships and inter-island connectivity enhancements.</p>	<p>Abu Dhabi has positioned itself as a global cultural and leisure hub, underpinned by landmarks such as the Sheikh Zayed Grand Mosque, and Louvre Abu Dhabi. Dubai combines flagship attractions—Burj Khalifa, Dubai Mall, and Dubai Marina—with global campaigns to sustain its luxury-shopping and MICE leadership. Sharjah is the UAE's cultural capital, and it showcases institutions such as the Sharjah Art Museum, hosts marquee events, and offers eco-tourism at mangrove reserves.</p>

STATE AND NATIONAL TOURISM POLICY – INDIA

State-wise campaigns focus on specific tourist sites within the region and specialized marketing for the state. Central campaigns on the other hand, aim to portray the whole country as a lucrative tourist destination. **Collaboration at the central and state level can lead to more rigorous marketing and help states highlight their individual strengths.**

The Ministry of Tourism and the Infrastructure Development Division are disbursing funds to the state/UT authorities to develop tourist destinations with potential and in need of restoration. They have also set up a monitoring committee to assess the progress of these projects.²⁰¹

PUBLIC-PRIVATE PARTNERSHIPS (PPP)

PPPs attract private capital needed for development of tourist sites that can't be financed through public funding alone. In turn, **the government can help provide support** to the private sector since tourism projects may not always have the most lucrative financial returns. The Indian government has taken steps within the 2025 Budget to initiate PPPs²⁰² in the tourism and hospitality sector. Through events like the PPP MENA Forum organized in the UAE, the government offers exciting new investment opportunities to companies.

INDIA	UAE
<ul style="list-style-type: none"> • In the Indian financial budget for 2024, emphasis was placed on PPPs to advance ropeways, eco-tourism hubs, and heritage site development. • The National Highway Authority of India raised over US\$ 2.41 bn through investments in 2024.²⁰³ 	<ul style="list-style-type: none"> • Published a manual on PPPs²⁰⁴ in June 2024 to outline procedural and legal frameworks for companies. • Dubai approved AED 40 billion²⁰⁵ worth of projects under PPPs in 2024. • Abu Dhabi Investment Office facilitated a total of AED 2.4 bn (US\$ 654 mn) in PPPs from 2020-24.²⁰⁶





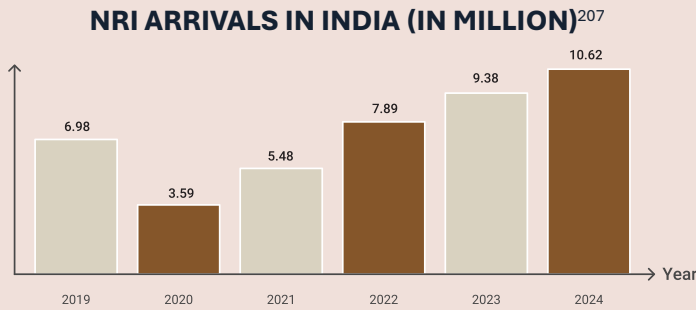
07

INDIA-UAE: GROWING TOGETHER

This chapter discusses the dynamic and ever-deepening partnership between India and the UAE, arising from active NRI tourism, organized UAE investments in Indian states, and India's stake in the UAE tourism sector. Together, they represent powerful economic opportunities and development of cultural partnerships that can lead to shared prosperity and, ultimately, collaborative development in the future.

NRI TOURISM

Non-Resident Indians (NRIs) have been instrumental in growing India's tourism and hospitality industries in recent years. NRIs are in a unique position to influence both markets because of their dual status in India and their home country. It is becoming more and more crucial to acknowledge the role that NRIs play in India's quest to become a top international travel destination.



Source: India Tourism Data Compendium Key Highlights 2025, India's Tourism Performance

NRI'S ROLE IN BOOSTING TOURISM IN INDIA

NRI arrivals in India grew significantly by nearly 196% between 2020 and 2024, reflecting a strong post-pandemic recovery. While years 2021 and 2022 saw rapid catch-up growth, recent trends indicate a shift towards a strong stable growth in NRI Arrivals in India.

PRAVASI BHARATIYA EXPRESS

To further engage the diaspora and invoke a sense of nostalgia, the Indian government launched initiatives like the Pravasi Bharatiya Express in Jan'25, a special tourist train launched for NRIs aged 45 to 65, designed to reconnect them with India's heritage by offering curated cultural and spiritual experiences across key destinations.²⁰⁸

These initiatives not only strengthen cultural connections but also have tangible benefits, such as **increased remittances, boosted foreign exchange earnings, and positive word-of-mouth marketing** that positions India as a desirable destination for international tourists.²⁰⁹

NRIs also help in promoting niche tourism segments like religious, cultural, medical, heritage, adventure, and eco-tourism.

INDIAN EXPATS IN THE UAE

- Around 4.36 million Indian expatriates reside in the UAE as of December 2024, making them a major driver of VFR (Visiting Friends and Relatives) tourism.²¹⁰
- Indian Expats in UAE often act as informal brand ambassadors, promoting UAE as a travel destination through word-of-mouth and social media.
- Cultural festivals like Diwali are celebrated on a grand scale in the UAE (e.g., Zabeel Park in Dubai saw over 60,000 attendees in Nov'24)²¹¹, adding a rich cultural layer that attracts global tourists.
- Indians in the UAE actively engage in and promote domestic tourism, showcasing the country's natural landscapes, heritage sites, and eco-tourism experiences within their networks.



Biggest ever Diwali festival in Dubai drawing more than 60,000 people in Zabeel Park

Source: Travels Dubai

UAE → INDIA: STATE-LEVEL INVESTMENT FLOW

The UAE is one of the largest foreign investors in India, channeling significant funds into various states across key industries. This section highlights the patterns and impact of state-level investment flows from the UAE to India.

INVESTMENT IN KERALA

Invest Kerala Global Summit (IKGS) 2025 witnessed the participation of UAE Minister of Economy, H.E. Abdulla bin Touq Al Marri, who highlighted the UAE's strategic focus on key sectors.

“The UAE is actively exploring investment opportunities across key sectors such as healthcare, tourism, food processing, and technology. With a vision for sustainable growth, our investments are not only shaping economic progress but also addressing global challenges - enhancing healthcare access, strengthening food security, driving technological innovation, and fostering resilient economies worldwide.”²¹²
- H.E. Abdulla bin Touq Al Marri, UAE Minister of Economy at the Invest Kerala Global Summit (IKGS) in Feb 2025.

In a strong show of commitment, UAE-based conglomerates Lulu Group and Sharaf Group each announced plans to invest ₹5,000 crore in Kerala, aiming to uplift multiple sectors and contribute significantly to the state's economic development.²¹³

As a nod to the UAE's 2025 theme, 'Year of Community', the North Malabar Chamber of Commerce organized the 'Year of Community Run' during the 8th Kannur Beach Run. The event promoted messages of unity, health, and global solidarity.

H.E. Al Marri joined the 5-km run alongside Shamsheer Vayalil, Chairman and MD of UAE's VPS Healthcare, and over 100 other participants. The 2025 Kannur Beach Run attracted over 1,000 runners across various categories, reinforcing its status as a leading sports event in Kerala.



H.E. Abdulla bin Touq Al Marri, minister of economy and tourism in the 'Year of Community Run' in Kannur, Feb 2025.

Source: Minister of Economy and Tourism²¹⁴

INVESTMENT IN GUJARAT

UAE's largest sovereign wealth fund, Abu Dhabi Investment Authority (ADIA), has commenced operations in India through GIFT City. Earlier in February, ADIA announced plans to allocate US\$ 4–5 billion²¹⁵ for investments in India via this international financial hub.

While not directly aimed at tourism, these investments are expected to boost India's infrastructure landscape-supporting tourism-linked sectors such as hospitality, premium real estate, and convention facilities.

The UAE remains India's largest Arab investor, contributing nearly US\$ 3 billion in FY 2023–24.²¹⁶ As GIFT City positions itself globally, it could become a catalyst for MICE and business tourism growth in India.



INDIA'S ENGAGEMENT IN UAE TOURISM

India represents a substantial source market for UAE tourism, with strong travel demand supported by robust trade relations that position India as a strategic platform for the UAE's tourism promotion. In 2024, India became Dubai's leading investor, with foreign direct investment surpassing US\$ 3 billion²¹⁷, underscoring its growing involvement in the UAE's tourism and related sectors.

AJMAN TOURISM'S FIRST "THREE-CITY" WORKSHOP IN INDIA, 2022

Hosted by Ajman Department of Tourism & Development (ADTD), this strategic workshop toured three major Indian cities to engage tourism professionals.²¹⁸

Ajman's proximity to Dubai/Sharjah enhances its accessibility for Indian travelers. ADTD showcased its latest tourism products-likely including resorts, cultural sites, and adventure packages. The initiative reflects Ajman's ambition to deepen its presence in the Indian market.

The newly inaugurated **BAPS Hindu Mandir in Abu Dhabi**, inaugurated by Hon'ble Prime Minister of India, Shri Narendra Modi, adds cultural depth to the UAE's landscape. While not a major tourist attraction, it symbolizes religious harmony and offers a meaningful experience for culturally inclined visitors.



BAPS Hindu Mandir, Abu Dhabi
Source: Shirshendu Sengupta

TOURISM PROMOTION BEYOND THE MAJOR EMIRATES

- IndiGo recently launched new flights connecting Mumbai–Fujairah and Kannur–Fujairah, expanding access to Emirate tourism, in 2024.²¹⁹ This addition aligns with IndiGo's international expansion strategy and enhances its UAE network, where it already operates flights to Abu Dhabi, Dubai, Sharjah, and Ras Al Khaimah.
- This enhanced connectivity not only promotes tourism in the lesser-known emirates like Fujairah but also supports the UAE's broader goal of diversifying its tourism economy, encouraging visitors to explore beyond the main hubs and experience the unique cultural and natural attractions across the country



Mr. TARIQ CHAUHAN

Co-founder and Vice Chairman of EFS Facilities Services Group
Board Member of UIBC-UC

"At EFS, Indian professionals represent close to 60% of our global workforce, underscoring their importance to our operational success. Their ability to seamlessly adapt and integrate to diverse cultural and operational environments has been instrumental in delivering exceptional service to our clients, further strengthening India's position as a talent hub for the hospitality industry.

We ensure that our workforce is equipped with globally recognized skills through a comprehensive and blended learning approach...As part of our global commitment to skills development, the EFSIM Skills Development Academy plays a pivotal role in upskilling our workforce. Based in India, this academy offers specialized training in domains such as Hospitality, Electrical, Plumbing, HVAC and more...To complement our skills development initiatives, EFS has established Centers of Excellence (CoEs) across UAE and Saudi Arabia. These centers serve as hubs that focus on specialized and practical training and knowledge sharing."



08

STUDY: GLOBAL TOURISM MODELS

This section discusses a range of different tourism models from around the world, discussing how various countries create and implement strategies aimed at attracting visitors, stimulating economies, and creating opportunities for intercultural exchange. By examining examples of successful models worldwide, this chapter identifies some of the primary reasons behind sustainable tourism development and provides insights into key factors for effective future tourism models.



FRANCE

France stands as the world’s most visited country, renowned for its rich cultural heritage, iconic landmarks, and diverse landscapes. From the glamour of Paris to the charm of its countryside and coasts, France offers a timeless and immersive travel experience for every kind of tourist.

Over 100 mn

International Visitors
2024

Source: France Alumni²²⁰

€71bn

(US\$ 82.69 bn)
Tourism Revenue
2024

STRENGTHS

- Rich Cultural & Historical Heritage
- High Global Popularity & Accessibility
- Mega Events & Year-Round Attractions
- Diverse Landscapes & Green Tourism
- Strong Hospitality & Luxury Infrastructure
- Inclusive & Accessible Tourism

- France has 45 UNESCO World Heritage Sites, historic cities, and scenic villages like Collonges-la-Rouge, alongside over 200 Remarkable Gardens promoting green tourism.
- **Icons:** Paris, with the Eiffel Tower, and Louvre museum, remain as global hotspots.

SEASONAL TOURISM

Summer draws visitors to Brittany and Midi, while winter sees high demand for Alps ski resorts like Chamonix and Les Arcs.

HOSTS MEGA EVENTS

- Olympics
 - Cannes Film Festival
 - Paris Fashion Week
 - Tour de France
- Ensuring year long visitors.

UNIQUE TOURISM NICHES

- Wine Tourism
- Slow Tourism
- Castle Hopping
- Fashion & Art Tourism
- Culinary Tourism (639²²¹ Michelin Starred Restaurants)

GOVERNMENT INITIATIVES AND INVESTMENT

Destination France plan: Launched in November 2021 for a budget of €1.9 bn (US\$ 2.2 bn).²²² Offers a 10-year roadmap for the development and transition of the French tourism sector focusing on sustainability, resilience, talent, and global competitiveness. Atout France, the French tourism development agency, is responsible for promoting the development of the tourism industry, the country’s largest economic sector.

INTEGRATION OF TECHNOLOGY & SMART TOURISM

- **85%** travelers using online booking platforms
- **75%** relying on mobile apps for navigation and other services
- **40%** increase in virtual visitors to Louvre Museum

Source: GoodRadioNews (Data as of 2025)²²³

INCLUSIVE & ACCESSIBLE TOURISM

- Over **4,000 certified**²²⁴ sites under the Tourism & Handicap label ensure accessible stays, attractions, and activities across France.
- **Inclusive transport options** include SNCF (French National Railway Company) assistance, adapted buses, accessible taxis, and beach/ski facilities.
- Tools like **accessible.net** and Jaccede, along with staff training and discounts, make planning and travel smoother for all.



FOCUS ON SUSTAINABILITY

France is a global leader in rural eco-tourism, implementing innovative initiatives like sustainable housing and food routes that both protect the environment and stimulate local economies.²²⁵



SINGAPORE

Singapore’s tourism industry stands as a global benchmark for strategic destination management, innovation, and integrated development. From iconic attractions like Marina Bay Sands and Gardens by the Bay to its leadership in the Meetings, Incentives, Conventions and Exhibitions (MICE) sector, Singapore has built an ecosystem that delivers both economic value and a premium visitor experience.

16.5 mn

International visitors in 2024

US\$ 22.4 bn

Tourism revenue Jan – Sep 2024

41 mn

Traveler capacity of Changi Airport, 2024

81.8%

Hotel average occupancy rate, 2024

Source: Singapore Tourism Board²²⁶

STRENGTHS:

- World-class infrastructure
- Clean & Safe Environment
- Government Led Branding
- Diverse product offerings
- Smart Nation Integration
- Private Public Partnerships

TOURISM OFFERINGS AND ATTRACTIONS:

There is an increased focus on these core industries: Hotels, Cruises, Integrated Resorts, Travel Agents and Tourist Guides, and MICE events. In addition, world-class attractions like Gardens by the Bay, Sentosa, and Mandai Wildlife Reserve are major drivers in the industry.

TOURISM STRATEGY:

- **Increasing market mindshare** through digital marketing and tech integration and 30 new augmented reality experiences.
- **Strategic collaborations** with Agoda, Expedia Group, Klook, Mafengwo, and Traveloka are made to offer customized, tech-driven travel experiences.
- Emphasis on expanding MICE tourism, **Herbalife Extravaganza 2026** to become largest event ever in Singapore.
- **Cultural Fusion** - Unique mix of Malay, Chinese, Indian, and Western influences reflected in food, festivals, and architecture.

GLOBAL EVENTS & POP-CULTURE TOURISM

- High profile concerts like Taylor Swift, Ed Sheeran and Coldplay.
- Disney’s Garden of Wonder debut in Southeast Asia.
- Hosted Anime Festival and Comic Con.
- F1 Grand Prix, Art Week.

UPCOMING ATTRACTIONS

- Singapore Oceanarium
- Porsche Experience Centre
- Expansion into wellness tourism and longevity experiences

FUN FACT

Mainland China, Indonesia and Australia are the top tourism markets for Singapore.



TOURISM 2040 STRATEGY

BY 2040

Singapore Tourism Board projects Tourism Receipts to reach between **\$47 and \$50 billion.**

- Capturing high growth demand
- Enhancing destination attractiveness
- Developing industry capabilities

Source: Singapore Tourism Board²²⁷



TANZANIA

Over the past few years, Tanzania has emerged as a regional tourism leader, not only due to its breathtaking attractions but also due to government-backed reforms, infrastructure development, and a growing emphasis on sustainability and community-led growth. From the snow-capped summit of Mount Kilimanjaro to the endless plains of the Serengeti and the turquoise waters of Zanzibar, Tanzania offers a uniquely diverse array of experience.

TOURISM OFFERINGS AND ATTRACTIONS	
TOURISM DESTINATION	VISITORS (2024)
Serengeti National Park	589,300
Zanzibar Beaches	478,900
Mount Kilimanjaro	295,400
Ngorongoro Crater	273,600

Source: TICGL Economic Consulting Group²²⁸

2.14 mn

International visitors
(2024)

US\$ 3.06 bn

International tourist
spending

9.5%

Contribution to GDP

US\$ 3.26 bn

Tourism revenue

Source: Tanzania Invest²²⁹; TICGL Economic Consulting Group²³⁰; WTTC²³¹

- The Serengeti National Park is home to millions of wildebeest and zebras.
- Zanzibar is known for its pristine white sandy beaches and crystal clear waters.
- Africa's highest peak, Kilimanjaro features upgraded trekking routes, improved safety systems and digital booking platforms.
- Ngorongoro Crater has been named a UNESCO World Heritage Site.



Serengeti National Park

32.5% of Tanzania's land is protected under law, including 21 national parks and 26 game reserves.

Source: eVisa Tanzania²³²



FUN FACT

Tanzania is ranked the fastest growing African tourism destination in 2024 by UN Tourism.

Source: Business Wire²³³

TOURISM STRATEGY:

- Expansion of eco-lodges, green resorts and community-based tourism initiatives by the government and private companies.
- The government is investing in tech solutions like smart tourism apps, online booking systems, and influencer driven marketing campaigns.
- There is an increased focus on preventing over-tourism and preserving biodiversity.
- Upgrades to major airports like Kilimanjaro international, improved road access to Serengeti and Ruaha, and expansion of airline Air Tanzania.
- The Tourism Confederation of Tanzania (TCT) has set up a new independent office to handle disputes and anti-corruption matters with a public-private model.
- Sector Branding through documentaries like The Royal Tour (2022) and Amazing Tanzania (2023) and a greater presence in international trade festivals and tours.

UPCOMING ATTRACTIONS

- Ruaha National Park
- Selous Game Reserve



FUN FACT

A UAE based firm, GSG Energies, invested US\$ 500 mn in Tanzania in 2024, focusing on infrastructure development.

Source: Daily News²³⁴

KEY TAKEAWAYS FROM TOURISM MODELS

The study of international tourism models reveals several insights that have broader implications for building resilient and innovative tourism ecosystems.

- 01. Leveraging Technology as a force multiplier:** The latest digital infrastructure, like contactless payments, tech driven customized itineraries, use of VR for digital marketing campaigns, and influencer driven campaigns play a pivotal role in enhancing the tourism experience of tourists. High-performing models have also leveraged technology to ensure accessibility needs are met, sustainability models are implemented, and smart crowd management is possible.
- 02. Community-Driven and Inclusive Growth:** A common thread among successful tourism models is the increased inclusion and empowerment of local communities in the industry. Blending tourism with local culture and livelihoods brings authenticity to the tourist experience and can also drive economic benefits to communities.
- 03. Focus on High-Yield Segments:** Rather than focusing solely on volume alone, it has proven effective to focus on high-value tourists as well. This also helps in ensuring that over-crowding is prevented and sustainability requirements are met. It focuses on revenue and reduces stress on infrastructure.
- 04. Strategic positioning of MICE tourism:** Focusing on driving tourism through MICE events like sports events, film festivals, entertainment exclusive events has also proven to be beneficial. Additionally, strategic participation in international tourism conferences can help improve global positioning.
- 05. Efficient Transport and Access:** A seamless multimodal transport network including high-speed trains, metros, and pedestrian zones makes tourist movement intuitive and accessible. This contributes to repeat visitation and extended stays.



CONCLUSION

India and UAE, often perceived as distinct in geography, history, and cultural composition have nonetheless carved out unique and strategic narratives in global tourism. Their partnership offers more than just contrast; it offers visible convergence in strategies. This report traced the multifaceted landscapes of both countries and the tourism sectors. By highlighting areas of strategic importance, the focus shifts from performance indicators to possibilities of collaboration through new tourism corridors, cross-border investments, and people-to-people connections. As the global tourism industry is changing and being influenced by recent technology and sustainability concerns, India and UAE are well poised to lead a new era of destination diplomacy. They are prime examples of promoting tourism as more than just leisure, it is a tool for economic growth, cultural preservation, and sustainable development. The pathways discussed in this report are not endpoints, but entryways into newer collaborations, smart partnerships, co-created experiences and global leadership in tourism excellence. The future of tourism belongs to those who can reimagine tourism to fit the dynamic and ever-changing demands of the customer segment. And in that mission, India and UAE stand as pioneers, not just as participants.





“

“India and the UAE share more than strong economic ties, we share a bold vision for the future. Our partnership is built on trust, innovation, and a common commitment to shaping resilient, forward-looking economies that advance prosperity and enhance the welfare of the people of the two countries. As we deepen our cooperation across a range of vital sectors, we are not only unlocking new opportunities for growth, innovation and excellence, but also creating a distinctive model of bilateral collaboration.”

H.H. Sheikh Hamdan bin Mohammed bin Rashid Al Maktoum
Crown Prince of Dubai, Deputy Prime Minister, and Minister of Defence, UAE

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