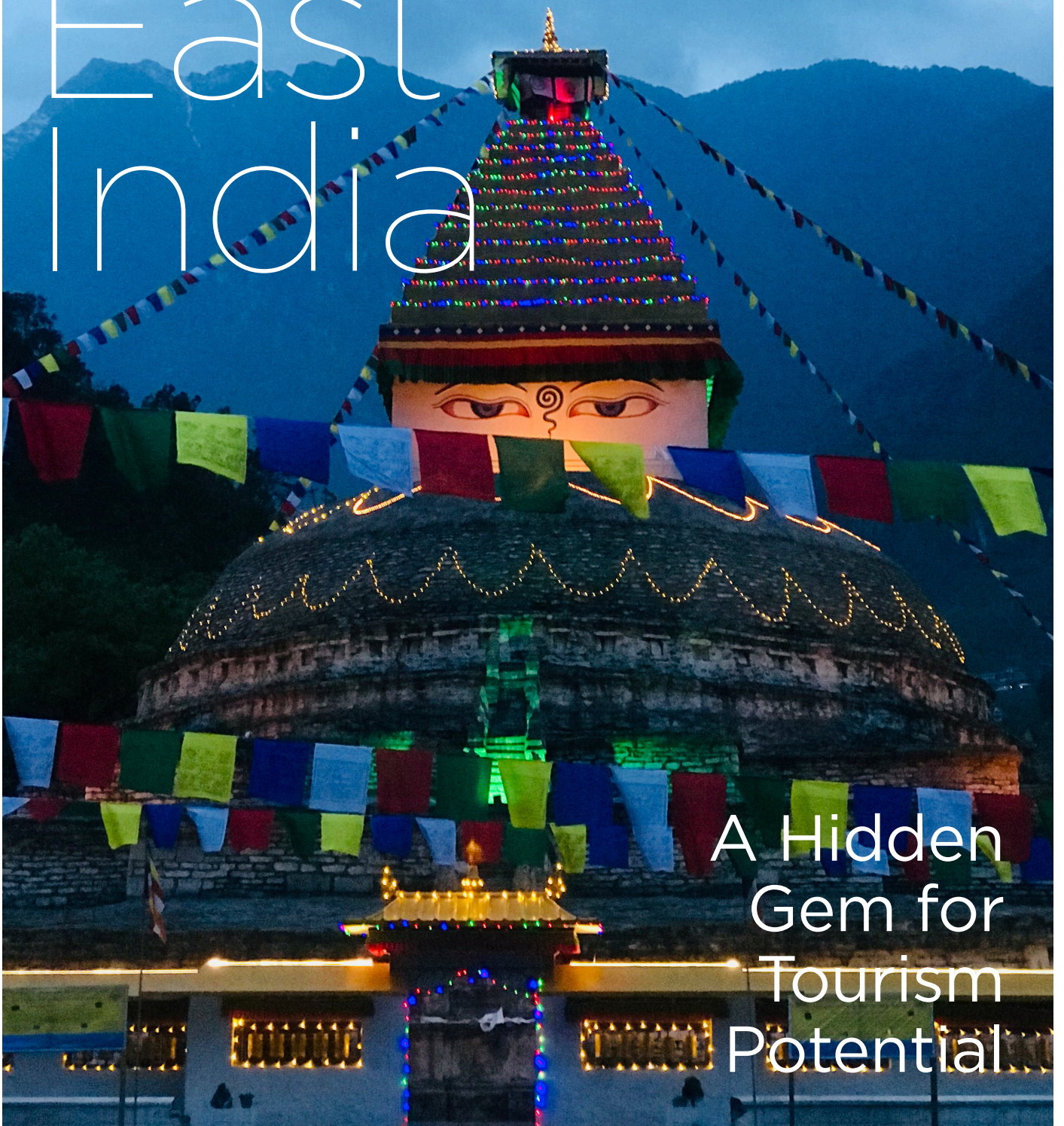


North East India

A Hidden
Gem for
Tourism
Potential





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Preface

India is a living celebration of 'unity in diversity', a nation whose strength lies in the harmonious coexistence of its many distinct identities, from its people to its geographies.

Northeast India represents one of the country's most compelling frontiers for tourism development. Despite its exceptional natural beauty, cultural diversity, and strategic location, the region remains underrepresented in India's tourism narrative. In 2024, it accounted for just 0.43% of domestic and 1.17% of foreign tourist visits, underscoring its vast untapped potential.

Encouragingly, several positive trends signal change. The region is undergoing a transformation driven by unprecedented infrastructure investments. Road, rail, and air connectivity have improved significantly over the past decade through initiatives such as UDAN, Swadesh Darshan 2.0, and cross-border projects that have shortened travel times and opened up previously remote destinations. These advances are beginning to enhance both visitor arrivals and investor confidence.

At the state level, governments have introduced progressive tourism policies emphasizing sustainability, community participation, and private sector collaboration. Assam, Sikkim, Meghalaya, and Nagaland, among others, are focusing on niche opportunities including ecological, adventure, wellness, cultural, and tea tourism. However, implementation gaps, uneven private investment, and fragmented marketing continue to constrain growth, highlighting the need for a coordinated regional strategy.

The Northeast is also gaining greater visibility on the global stage. Assam's inclusion in the *New York Times* "52 Places to Go in 2025" reflects growing recognition of the region's appeal. Its biodiversity, spiritual heritage, and cultural richness align with the global shift toward authentic and responsible travel. For India, the Northeast holds not only tourism value but also geopolitical importance as a bridge to Southeast Asia, reinforcing the need to integrate tourism into broader economic and diplomatic priorities.

This report, *Northeast India: A Hidden Gem for Tourism Potential*, has two key objectives. First, to present a data-driven overview of the region's tourism and hospitality landscape, including demand patterns, branded hotel presence, infrastructure development, and policy frameworks. Second, to chart a forward-looking roadmap that balances economic opportunity with sustainability, inclusivity, and cultural preservation. It also draws lessons from states like Gujarat, Kerala, and Rajasthan, which transformed their tourism sectors through branding, partnerships, and diversification.

We hope the insights within this report serve as a valuable resource for policymakers, investors, developers, and local stakeholders. As India enters a new phase of travel and hospitality growth, the Northeast stands at a decisive inflection point - poised to evolve from a niche destination into a mainstream, globally competitive tourism hub grounded in sustainability, culture, and community-driven progress.

Introduction

Within India's grand national tapestry, the Northeast forms a vibrant and integral thread, enriching the collective story with its unique rhythm, voice, and vision.

Comprising the 'Seven Sisters' - Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Tripura - and the 'One Brother', Sikkim, the Northeast India region is a cultural and ecological treasure trove. With snow-laden peaks, lush valleys, sacred forests, and centuries-old traditions, this region offers a deeply immersive and authentic experience that is hard to find elsewhere in the country. Bordering Bhutan, China, Nepal, Bangladesh, and Myanmar, this captivating region also serves as a vital geopolitical and cultural bridge between South and Southeast Asia.

Once perceived as remote and difficult to access, Northeast India is now experiencing a quiet transformation. Infrastructure investments, spanning airports, highways, rail network, and digital connectivity, are helping close both physical and perceptual distances. States like Assam and Sikkim are emerging as success stories, leveraging strengths in eco-tourism, agriculture, and hydropower.

Against this backdrop, tourism and hospitality sectors are poised to become powerful engines of inclusive growth. From wildlife encounters in Kaziranga to spiritual trails in Tawang, from cultural festivals like Hornbill and Sangai to tea garden stays and mountain treks, the Northeast promises travelers an unfiltered, soul-stirring experience.

This whitepaper explores the region's evolving tourism landscape, examining emerging demand drivers, infrastructure progress, hospitality trends, and development challenges, while offering actionable recommendations to unlock Northeast India's vast, yet largely untapped, tourism potential.



As India explores new growth frontiers, the Northeast's tourism potential holds the key to unlocking jobs, local entrepreneurship, and sustainable regional development.

The eight states of Northeast India – Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Tripura, and Sikkim – hold immense strategic significance for the country. Sharing international borders with five countries – Bangladesh, Bhutan, China, Myanmar, and Nepal – the region is a critical gateway to Southeast Asian cross-border trade, cultural exchange, and regional diplomacy. Yet, its significance extends far beyond geography.

Despite accounting for nearly 8% of India's geographical area, the Northeast is home to just 3.78% (2011 census) of the country's population, with over half residing in tribal communities, particularly in remote and hilly terrains. This cultural mosaic comprises more than 135 scheduled tribe groups, each with distinct languages, traditions and heritage, making the region one of the richest expressions of India's diversity. Its lush forests, tea estates, rolling hills, and river valleys not only support ecological balance but also position the region as a global biodiversity hotspot.

The region is endowed with abundant yet underutilized natural resources, including agro-horticultural produce, forest cover, bamboo, hydropower potential, oil, natural gas, and mineral deposits, making it ideal for sustainable industrial growth. In recent years, the region has begun to see a surge in investment across sectors such as pharmaceuticals, agribusiness, tourism, education, healthcare, cement, and infrastructure, positioning it as an emerging hub for manufacturing and services in India. A landmark example is the Tata Group's ₹27,000 crore investment in Assam to set up the country's first indigenous semiconductor manufacturing plant.

However, despite its vast resources and strategic location, Northeast India currently contributes just 2-3% to India's GDP. This is not due to a lack of potential but rather a reflection of long-standing challenges, including infrastructure gaps, low industrial base, and policy fragmentation. While the region's overall contribution to India's GDP remains modest, there are clear signs of economic dynamism at the state level.



Northeast is home to just 3.78% of the country's population, with over half residing in tribal communities, particularly in remote and hilly terrains. This cultural mosaic comprises more than 135 scheduled tribe groups.

Economic Significance

Mapping the
Northeast's
Growth Impact

State-Wise Economic Overview of Northeast India

With coordinated policy action, targeted infrastructure development, and stronger private sector participation, Northeast India has the ingredients to become a vital economic engine for India's next phase of inclusive growth.

GSDP in INR Crore

Sikkim

GSDP
2023-24 2024-25
24,902.3 –

GROWTH OVER THE PREVIOUS YEAR
2023-24 2024-25
8.52% –

GSDP GROWTH CAGR (2018-19 TO 2023-24)
5.98%

KEY SECTORS
Tourism, Agriculture, Floriculture, Agro-processing, Hydroelectric power, Tea, Large cardamom, Minerals, Electronics, Pharmaceuticals.

Assam

GSDP
2023-24 2024-25
313,064.5 **337,933.4**

GROWTH OVER THE PREVIOUS YEAR
2023-24 2024-25
11.58% **7.94%**

GSDP GROWTH CAGR (2018-19 TO 2023-24)
6.26%

KEY SECTORS
Tea, Coal, Oil & gas, Agriculture, Sericulture, Tourism, Food processing, Horticulture.

Meghalaya

GSDP
2023-24 2024-25
28,342.3 **29,911.9**

GROWTH OVER THE PREVIOUS YEAR
2023-24 2024-25
5.80% **5.54%**

GSDP GROWTH CAGR (2018-19 TO 2023-24)
3.62%

KEY SECTORS
Handloom & handicrafts, Sericulture, Mining, Cement, Food processing, Agriculture, Floriculture, Hydroelectric power, Tourism.

Tripura

GSDP
2023-24 2024-25
46,054.3 –

GROWTH OVER THE PREVIOUS YEAR
2023-24 2024-25
8.77% –

GSDP GROWTH CAGR (2018-19 TO 2023-24)
4.61%

KEY SECTORS
Natural gas, Food processing, Rubber, Tea, bamboo, Handloom & handicrafts, Sericulture, Tourism.

Mizoram

GSDP
2023-24 2024-25
22,266.9 **46,054.3**

GROWTH OVER THE PREVIOUS YEAR
2023-24 2024-25
10.34% **8.77%**

GSDP GROWTH CAGR (2018-19 TO 2023-24)
6.70%

KEY SECTORS
Bamboo, Sericulture, Energy, IT, Food processing, Agriculture, Tourism, Medicinal plants.

Manipur

GSDP
2023-24 2024-25
24,394.1 –

GROWTH OVER THE PREVIOUS YEAR
2023-24 2024-25
9.95% –

GSDP GROWTH CAGR (2018-19 TO 2023-24)
5.96%

KEY SECTORS
Sericulture, Bamboo, Hydro power, Mineral-based products, Tourism, Handloom & handicrafts, IT.

Nagaland

GSDP
2023-24 2024-25
21,365.2 –

GROWTH OVER THE PREVIOUS YEAR
2023-24 2024-25
11.80% –

GSDP GROWTH CAGR (2018-19 TO 2023-24)
4.80%

KEY SECTORS
Bamboo, Sericulture, Horticulture, Minerals, Agriculture, Tourism, Mining.

Arunachal Pradesh

GSDP
2023-24 2024-25
20,490.9 –

GROWTH OVER THE PREVIOUS YEAR
2023-24 2024-25
9.14% –

GSDP GROWTH CAGR (2018-19 TO 2023-24)
4.20%

KEY SECTORS
Weaving, Horticulture, Tourism, Cane & bamboo, Arts & crafts, Wood carving, Ornaments.



Tourism in Northeast India

The Current Landscape

Northeast India stands out for breathtaking landscapes, rich biodiversity, and vibrant culture. While being among the country’s most captivating regions, its tourism potential remains underleveraged.

Despite its vast potential, Northeast India accounted for only 0.43% of India’s Domestic Tourist Visits (DTVs) and 1.17% of Foreign Tourist Visits (FTVs) in 2024. This limited share is indicative of both the region’s untapped potential and the need for a more strategic approach to tourism development.

State-wise Tourism Stats

State	Domestic Tourist Visits in 2024 (in million)	Foreign Tourist Visits in 2024 (in million)	% Share in 2024	
			Domestic Tourist Visits	Foreign Tourist Visits
Arunachal Pradesh	0.870	0.005	0.03%	0.02%
Assam	7.608	0.027	0.26%	0.13%
Manipur	0.029	0.003	0.00%	0.01%
Meghalaya	1.586	0.023	0.05%	0.11%
Mizoram	0.422	0.005	0.01%	0.03%
Nagaland	0.126	0.006	0.00%	0.03%
Sikkim	1.540	0.085	0.05%	0.41%
Tripura	0.601	0.091	0.02%	0.43%
Total Northeast Region	12.781	0.244	0.43%	1.17%

Source: Ministry of Tourism

In recent years, however, both government and the private sector have increasingly recognized the region’s value, leading to greater investments in tourism infrastructure, connectivity and destination promotion.

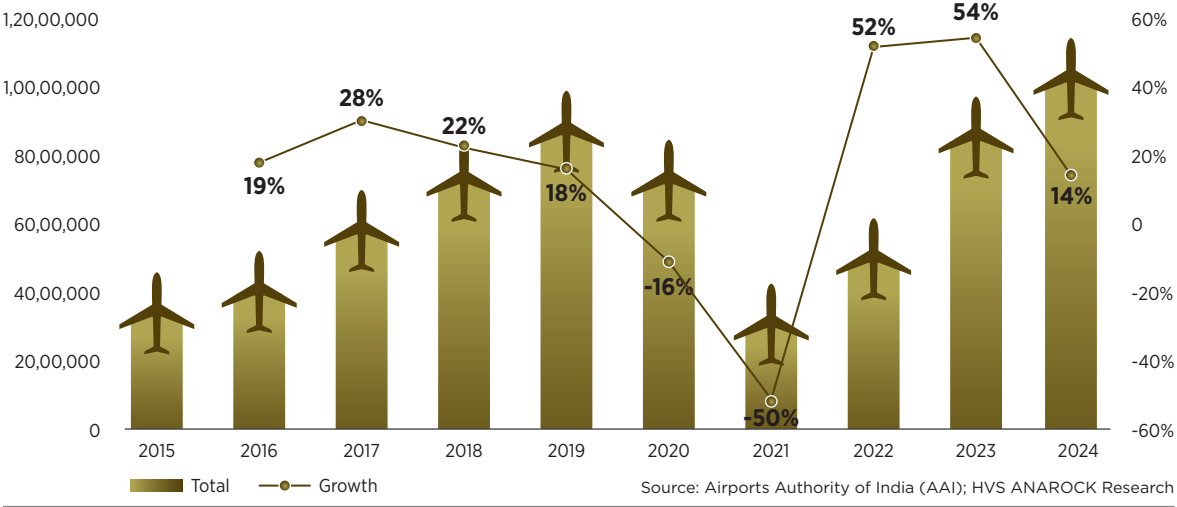
Growing Air Traffic

Air traffic in Northeast India has shown a dynamic trajectory over the past decade. From 2015 to 2019, the region witnessed consistent and robust growth, with passenger numbers increasing annually by 18% to 28%, culminating in over 9.8 million travelers in 2019. However, the onset of the COVID-19 pandemic in 2020 brought a sharp decline in growth momentum, falling by 16% that year, followed by a significant 50% drop in 2021. This period marked the lowest point of the decade. Encouragingly, the sector rebounded strongly post-pandemic, registering an impressive growth of 52% in 2022 and 54% in 2023. Traffic grew robustly between 2015-2019 at a CAGR of 21.5%. By 2024, air traffic had reached an all-time high of approximately 11.2 million passengers, with a more moderate growth rate of 14%, indicating a move towards stabilization after a rapid recovery phase.

Air traffic rebounded strongly post-pandemic, registering an impressive growth of 52% in 2022 and 54% in 2023. By 2024, air traffic had reached an all-time high of approximately 11.2 million passengers.

This remarkable growth has been fueled by enhanced regional connectivity through government initiatives, expansion of airline networks, and improved airport infrastructure, which have collectively opened up the Northeast to greater tourism and business travel. Rising economic activity and increasing disposable incomes have further supported this upward trajectory. Additionally, the post-pandemic surge in travel demand, driven by both leisure and commercial segments, has reinforced the long-term growth potential of the region’s aviation sector.

Northeast Air Traffic



With the region increasingly gaining strategic and economic importance, ongoing infrastructure upgrades, improved connectivity, and growing tourism and business interest are likely to drive steady growth in passenger numbers. Air traffic grew at a CAGR of 10.6% between 2015-2024. If this CAGR is taken forward to 2030, air traffic will nearly double from 11.2 million in 2024 to nearly 20.5 million by 2030. This projected increase in air traffic will have a direct positive impact on the tourism and hospitality sectors. Improved accessibility will encourage greater tourism inflow, both domestic and international, leading to increased occupancy rates in hotels, higher demand for local tour services, and overall economic stimulation in related industries such as transportation, food, and retail. Government initiatives like the UDAN scheme and focused regional promotion campaigns will further strengthen these sectors, positioning the Northeast as a key emerging tourism hub in India.



Arunachal Pradesh



FUTURE GROWTH ENABLERS
Donyi Polo Airport Expansion.

Arunachal Pradesh, India's northeastern-most state, is the largest state in the region by area (83,743 sq. km). It is renowned for its pristine landscapes, diverse tribal cultures, and spiritual heritage. To harness its tourism potential, the state recently introduced the "Arunachal Pradesh Tourism Policy 2025-30" with the tagline "Arunachal: Beyond Myths and Mountains."

This policy aims to strategically position Arunachal Pradesh as a premier global destination for sustainable and experiential tourism, focusing on adventure, tribal, wellness, spiritual, farm, wine, cultural, heritage, MICE (Meetings, Incentives, Conferences, and Exhibitions), and border tourism.

TOURISM HIGHLIGHTS

Adventure tourism (trekking, rafting, paragliding), cultural festivals (Ziro Music Festival and Losar Festival), and spiritual sites (monasteries like Tawang Monastery and pilgrimage sites like Parshuram Kund).

KEY INITIATIVES

Infrastructure development, skill development, investment facilitation, single-window clearance for tourism projects, long-term land leases, and community-based tourism models.



Assam

Assam, the gateway to Northeast India, is a state where natural beauty, cultural heritage, and adventure seamlessly blend. Known as the land of the "Red River and Blue Hills," Assam is home to the mighty Brahmaputra River, lush tea gardens, rich wildlife, and a vibrant cultural tapestry. It is recognized worldwide for its two UNESCO World Heritage Sites, Kaziranga National Park, home to the one-horned rhinoceros, and Manas Wildlife Sanctuary, a biodiversity hotspot. The 2022 Assam Tourism Policy focuses on sustainable tourism, wildlife conservation, and cultural heritage.



FUTURE GROWTH ENABLERS
Seaplane services on the Brahmaputra unlocking new avenues.

TOURISM HIGHLIGHTS

Wildlife & eco-tourism (five national parks and 17 wildlife sanctuaries including Kaziranga and Manas National Parks), tea tourism, river cruises, and cultural tourism.

KEY INITIATIVES

Subsidy 30% of capital investment subject to a ceiling of ₹5 crore, development of Special Tourism Zones, alignment with Sustainable Development Goals 2030, community-based tourism models, enhanced digital marketing and "Awesome Assam" branding, and promotion of tea tourism, river tourism, golf tourism and other niche segments.

Manipur

FUTURE GROWTH ENABLERS
Airport modernization at Imphal (Bir Tikendrajit International).



Manipur, often referred to as the “Switzerland of the East,” boasts a unique blend of natural beauty and cultural richness. Known for its lush landscapes, serene lakes, and vibrant cultural traditions, Manipur is a destination with immense tourism potential. The state’s location, bordering Myanmar, offers unique opportunities for cross-border tourism and trade. The 2022 Manipur Tourism Policy aims for tourism revenue to account for 5% of the state’s GSDP by 2030.

TOURISM HIGHLIGHTS

Eco and Adventure tourism, Iconic attractions (such as the freshwater Loktak Lake and Keibul Lamjao National Park, which is the only floating national park in the world), cultural festivals (Sangai Festival and Shirui Lily Festival), and historical sites (Kangla Fort).

KEY INITIATIVES

Industry status to tourism, 2.5% fixed capital subsidies, promotion of Polo tourism, development of WWII heritage sites and utilization of Public-Private Partnership (PPP)/Public Private Community Partnership (PPCP) to develop the sector.



FUTURE GROWTH ENABLERS
Baljek Airport to be operationalized for 20-seater aircrafts.

Known as the “Abode of Clouds,” Meghalaya is a land of mist-shrouded mountains, lush green forests, and cascading waterfalls. Spanning an area of 22,429 square kilometers with a forest cover of over 76%, the state is celebrated for its rich biodiversity, cultural diversity, and natural wonders. Meghalaya has positioned tourism as a key driver of economic growth, with the sector contributing approximately 4.1% to the state’s GSDP and directly supporting the livelihoods of nearly 50,000 people. The state is focusing on experiential tourism through its 2023 policy.



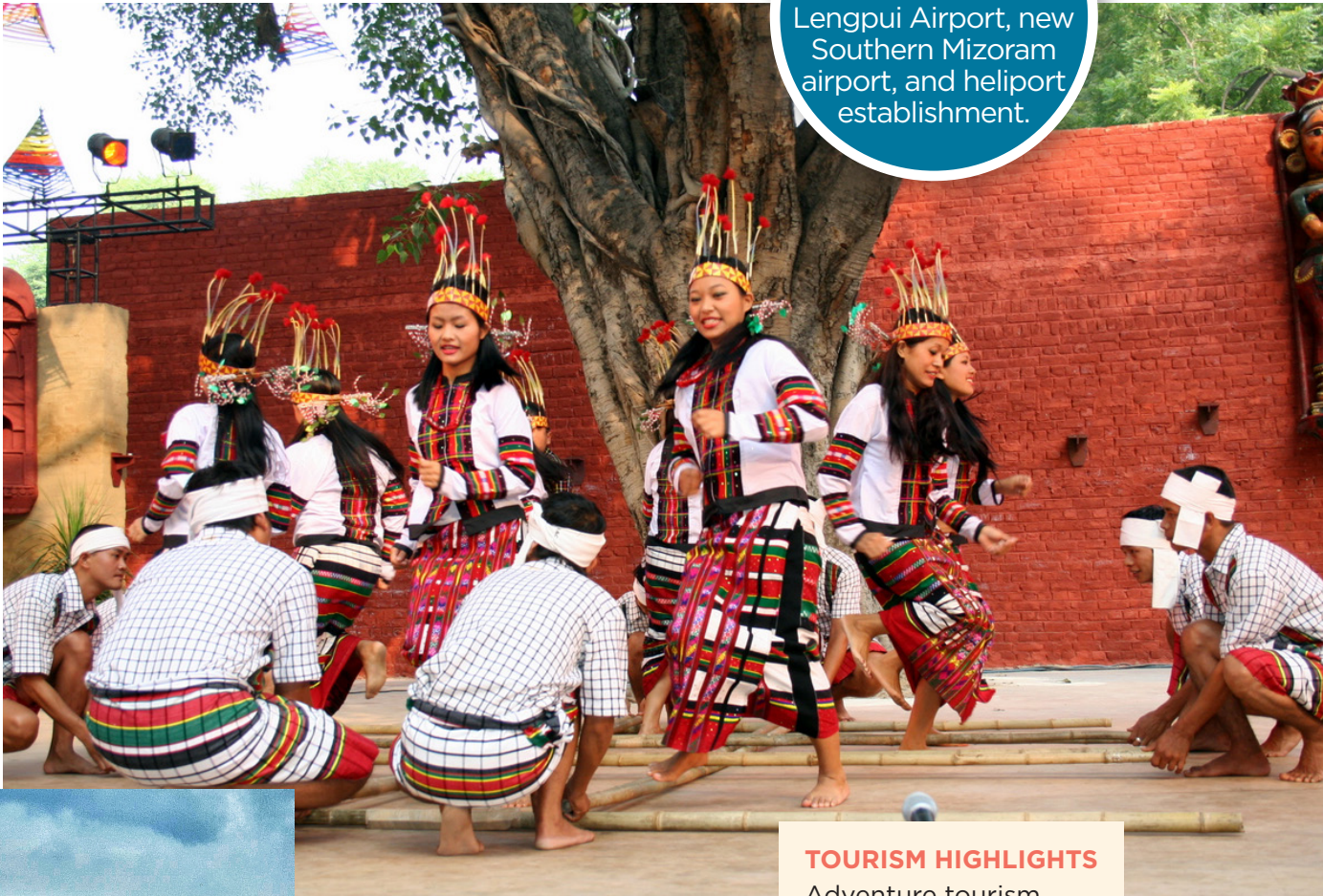
TOURISM HIGHLIGHTS

Living root bridges, crystal-clear river in Dawki, waterfalls (such as Nohkalikai Falls, Seven Sisters Falls), cleanest village (Mawlynnong), caves (Siju caves), and music festivals (The Cherry Blossom Festival).

KEY INITIATIVES

Development of new tourist circuits beyond Shillong-Sohra, promotion of high-value tourism, experiential travel, loan subsidies, and community-based tourism.

Mizoram



FUTURE GROWTH ENABLERS
AAI to take over Lengpui Airport, new Southern Mizoram airport, and heliport establishment.

TOURISM HIGHLIGHTS
Adventure tourism (trekking, paragliding), eco-tourism, cultural festivals, and wellness retreats.

KEY INITIATIVES
Up to 60% power subsidies, land subsidy of 25% on lease fees for new units, and promotion of eco-friendly tourism activities and niche segments such as nature-based, homestays, adventure, wildlife, cultural, film, golf tourism etc.



Mizoram, branded “Mystical Mizoram,” is positioning itself as a hub for eco, adventure, and wellness tourism. The 2020 Responsible Tourism Policy emphasizes sustainable practices and community involvement, while actively promoting cultural preservation, local entrepreneurship, rural homestays, and immersive nature-based experiences that highlight the state’s rich biodiversity and unique tribal heritage.



FUTURE GROWTH ENABLERS
Rail Connectivity and Waterways.

TOURISM HIGHLIGHTS
Hornbill Festival, tribal village experiences, adventure tourism, and eco-tourism spots like Dzukou Valley.

KEY INITIATIVES
Emphasis on sustainable tourism, homestays, community-based tourism model, infrastructure upgrades, promotion of cultural festivals, and niche segments such as film tourism.

Nagaland, known for its breathtaking landscapes, vibrant tribal heritage, and iconic festivals such as the Hornbill Festival, is a land of captivating contrasts. The state’s 2024 tourism policy emphasizes a sustainable, community-driven approach, aiming to preserve natural beauty while providing authentic cultural experiences. It highlights adventure tourism, eco-initiatives, skill development, homestays, and responsible infrastructure growth, ensuring inclusive community participation and offering visitors insights into Nagaland’s traditions, cuisines, crafts, and warm hospitality.

Sikkim

FUTURE GROWTH ENABLERS
Upcoming Skywalk at Bhaleydung, Yangang, Namchi.



TOURISM HIGHLIGHTS

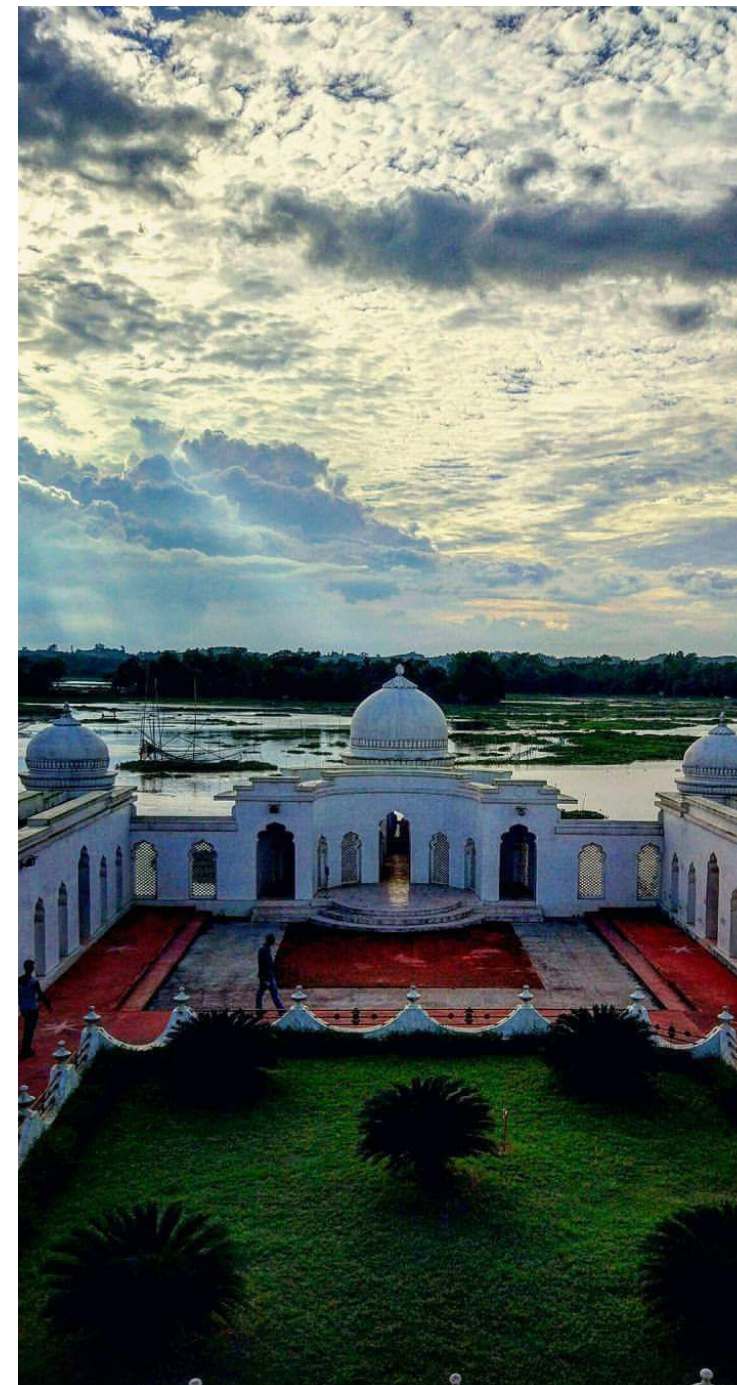
Tsomgo Lake, Gurudongmar Lake, Nathula Pass, Kanchenjunga Biosphere Reserve (also known as Khangchendzonga National Park), which is a UNESCO World Heritage Site, and monasteries (such as Rumtek and Pemayangtse).

KEY INITIATIVES

Sustainable tourism development, focus on high-value, low-impact tourism, 100% income tax exemption for 10 years, promotion of organic farming, and development of eco-tourism circuits.

Nestled in the eastern Himalayas, Sikkim is a state known for its breathtaking landscapes, rich biodiversity, and strong commitment to sustainability. With the towering Kanchenjunga, the third-highest peak in the world, as its backdrop, Sikkim through its 2018 Tourism Policy is promoting high-value, low-impact tourism to strike a balance between economic growth and environmental conservation. Sikkim is also renowned for being India's first fully organic state.

Tripura



TOURISM HIGHLIGHTS

Ujjayanta Palace, Neermahal Water Palace, Unakoti, Jampui Hills, Wild life sanctuaries such as Sepahijala Wildlife Sanctuary, religious places like Tripura Sundary Temple and Buddhist Stupa.

KEY INITIATIVES

Industry status to Tourism, 4% interest reimbursement, development of National Highway-8, and promotion of eco-tourism activities and niche segments such as film tourism, tea & golf, wellness and heritage etc.

Tripura, with its green valleys and handlooms, is steadily positioning itself as an emerging destination for eco, adventure, and cultural tourism via its 2020-25 tourism policy. With its serene lakes, ancient temples, and vibrant festivals, Tripura offers a diverse tourism experience that appeals to both domestic and international travelers.

Northeast Tourism Policies

Across the region, tourism policies prioritize sustainability, community participation, creation of niche tourism products, destination marketing and infrastructure development, supported by incentives such as tax exemptions, power subsidies, and single-window clearance systems. These efforts aim to boost employment, preserve cultural and ecological heritage, and position Northeast India as a global tourism and trade hub.



ARUNACHAL PRADESH

Tourism Policy 2025-30

Tagline: *Beyond Myths and Mountains*

Focus: Position Arunachal as a leading sustainable and experiential destination

- Single-window clearance, land banks & long-term leases
- Dedicated facilitation cell & oversight councils
- 50% accommodation capacity increase via homestays & alternate stays
- Skill training, branding & infrastructure upgrades

ASSAM

Tourism Policy 2022

Tagline: *Awesome Assam*

Focus: Position Assam as a sustainable, globally recognized destination

- Special Tourism Zones & single-window clearance system
- 30% reimbursement of capital investment (up to ₹5 crore)
- Power subsidy of ₹2/unit for 5 years
- Full reimbursement of stamp duty (up to ₹25 lakh)
- 2% interest subsidy on working capital loans for 5 years (capped at ₹50 lakh)
- Focus on responsible tourism, infrastructure & heritage preservation



MANIPUR

Tourism Policy 2022

Tagline: *Gateway to Southeast Asia*

Focus: Position Manipur as a world-class tourism destination by 2030

- Tourism to contribute 5% to State GDP by 2030
- Emphasis on sustainable, experience-led tourism
- Incentives proposed for entrepreneurs, artisans, especially local handloom/handicraft

MEGHALAYA

Tourism Policy 2023 | Film Tourism Policy 2025

Tagline: *Abode of Clouds*

Focus: Develop Meghalaya as a sustainable, community-led tourism and film destination

- Eco-tourism, infrastructure development & community participation
- Subsidies up to ₹1 crore (25% of costs) for national/international films
- Subsidies upto ₹50 lakh for Khasi, Pnar, and Garo films
- Facilitate productions via the Film Facilitation Cell



MIZORAM

Tourism Policy 2020

Tagline: *Mystical Mizoram: A Paradise for Everyone*

Focus: Build a resilient, sustainable tourism economy rooted in community and conservation

- Target segments like Eco, adventure, cultural, wellness & film tourism
- Power subsidy up to 60% on total consumption
- Land subsidy of 25% on lease fees for new units
- Manpower subsidy of 50% of training course fees
- Up to 90% subsidy on project report preparation
- Strong focus on environmental stewardship & local empowerment

NAGALAND

Tourism Policy 2024

Tagline: *Land of Festivals*

Focus: Eco-friendly, community-based tourism rooted in tribal culture and sustainability

- Priority sector under Industrial Policy
- Emphasis on adventure, village stays, wellness, & nature tourism
- Strong role for locals via homestays & tourism committees
- Infra push via roads, accommodations & tourist facilities
- Incentives for skill training, digital outreach & service excellence
- Financial support for hotels, restaurants, transport & travel services
- Goal to attract quality tourists & ensure inclusive growth



TRIPURA

Tourism Policy 2020-25

Tagline: *Visit Tripura - The Evergreen State*

Focus: Establish Tripura as a global destination via sustainable tourism & improved infrastructure

- Industry status granted to tourism
- Focus on eco, adventure, religious tourism & tourist circuits
- Strengthen digital marketing
- Human resource skilling via training institutes
- 4% interest reimbursement on term loans for 5 yrs
- 100% exemption on earnest money & security deposits
- 50% subsidy on employer's EPF & ESI contributions post 5 years
- 100% reimbursement of certification charges (national/international)

SIKKIM

Tourism Policy 2018

Tagline: *Where nature smiles*

Focus: Promote high-value, low-impact tourism aligned with green and organic principles

- Emphasis on eco, adventure, wellness & cultural tourism
- Eco-friendly infrastructure & human resource development
- 100% income tax exemption for 10 years
- 15% capital investment subsidy (up to ₹30 lakh)
- 3% interest subsidy on working capital loans
- 100% reimbursement of insurance premiums



Note: This infographic presents a brief snapshot of each state's key tourism policy highlights. Please refer to the official policy documents for complete details.

Policy Support

Government Schemes Boosting Tourism

The central government has launched key schemes to enhance tourism across India, including the Northeast, focusing on infrastructure, accessibility, and sustainable practices.

PRASHAD Scheme

Launched in 2014-15, this scheme focuses on developing pilgrimage and heritage sites to promote religious tourism, ensuring world-class amenities at spiritual destinations.

Swadesh Darshan Scheme

Introduced in 2015 and recently revamped, this scheme aims to develop thematic tourism circuits, with a focus on sustainable and eco-friendly destinations. The Northeast has been a key focus area under this scheme, with circuits developed around adventure, culture, and spiritual themes.

Assistance to Central Agencies for Tourism Infrastructure Development

This scheme provides financial support for developing essential tourism infrastructure, including connectivity and public amenities, ensuring a better visitor experience.

Dekho Apna Desh

Launched in 2023 to encourage domestic tourism, this scheme promotes travel within India, highlighting 50 key destinations, including the Northeast.

UDAN (Ude Desh Ka Aam Nagrik) Scheme

A regional connectivity scheme launched in 2016 to make air travel affordable and widespread. It has significantly improved air connectivity in the Northeast, making remote destinations more accessible to tourists.

Adarsh Station Scheme

Initiated in 2009-10 to modernize railway stations across India, improving travel experiences. Several stations in the Northeast have been upgraded under this initiative, enhancing convenience for tourists.

Additionally, the Ministry of Tourism is promoting 'Industry Status' for tourism, providing commercial concessions, tax rebates, reduced stamp duty, and GST benefits. Currently, 11 states, including Gujarat, Kerala, Rajasthan, and Tripura, have granted Industry Status to tourism, and others are considering it.



Bridging Distances

Infrastructure Catalysts for Tourism

Northeast India, with its challenging terrain and strategic location, has long grappled with connectivity issues that have hindered its economic and tourism potential. Recognizing this, the Government of India has launched a series of comprehensive infrastructure initiatives to enhance connectivity and promote inclusive development in the Northeastern Region. These efforts span across road, rail, air, and waterway sectors, with significant investments and targeted programs being implemented by various central ministries and departments. These initiatives will not only build physical infrastructure but will also transform the region's economic landscape, improving accessibility and enhancing the quality of life for its people.

From expanding road networks that cut through rugged mountains to developing state-of-the-art airports, railway lines, and inland waterways, the government's focus is on creating a multimodal connectivity ecosystem. Such enhancements are expected to reduce travel time, lower transportation costs, and unlock the region's vast tourism potential. More importantly, these initiatives will help integrate the region more closely with the rest of India and neighboring countries, thus, boosting trade, tourism and investments.

Road Connectivity

Road infrastructure in Northeast India plays a vital role in enhancing connectivity across its difficult terrain and remote areas. Given the region's strategic importance and economic potential, the government has prioritized rapid highway development. Major programs and dedicated funding are driving improvements in both intra-regional and interstate road links, significantly reducing travel times. For instance, the driving time between Itanagar and Guwahati, which, just about a decade ago, took around 10-12 hours due to narrow roads and frequent disruptions, has now been reduced to approximately 5.5-6 hours. This improvement is largely credited to projects such as the construction of new roads, widening of key highway stretches, and the development of bypass routes that have streamlined traffic flow.



Budget Allocation & Focus

- 10% of Ministry of Road Transport & Highways' total budget is earmarked for the North-Eastern region.
- Strong focus on improving intra-regional and inter-regional connectivity.

Key Programs & Schemes

- SARDP-NE, Bharatmala Phase-I, and the East-West Corridor prioritized.
- Central Road and Infrastructure Fund (CRIF): 147 works in progress, worth ₹4,644 crore, for state road improvements.
- Economic Importance & Inter-State Connectivity Scheme (now merged with CRIF): 10 projects underway, worth ₹368 crore.

Others

- The Ministry of Road Transport and Highways (MoRT&H) has constructed 16,207 km of National Highways in the Northeast Region.
- The Indian government will invest ₹10 lakh crore over two years to upgrade highways, with ₹3.7 lakh crore earmarked for 21,355 km of roads in eastern states, focusing on bringing Northeast infrastructure to U.S. standards.
- Under Pradhan Mantri Gram Sadak Yojana (PMGSY), 17,637 road projects (89,436 km) and 2,398 bridges were sanctioned in the North East, of which 16,469 projects (80,933 km) and 2,108 bridges have been completed, greatly enhancing last-mile connectivity in remote areas.



Rail Connectivity

The pace of railway projects in Northeast India has significantly accelerated in recent years, with numerous initiatives aimed at enhancing connectivity and boosting economic development in the region.

Railway Projects Commissioned (2014-24)

- 1,728 km of new tracks laid, averaging 172.8 km per year, compared to 333 km (averaging 66.6 km/year) between 2009 and 2014.

Ongoing Railway Enhancement Projects

- 18 new projects comprising of 13 new lines and 5 doubling works spanning 1,368 km and costing ₹74,972 crore. Of this, 313 km has been commissioned, and ₹40,549 crore has been spent up to March 2024.

Cross-border Connectivity Initiatives

- 14 new railway routes connecting Bangladesh and Nepal, covering over 1,275 km, aimed at improving trade and passenger services.
- The Akhaura-Agartala line (15 km dual-gauge rail link) inaugurated in November 2023:
 - » Expected to reduce travel time from Kolkata to Agartala from 38 hours to 10 hours by rail.

- » Will lower cargo transport costs and enhance tourism in Northeast India.
- » Strengthens bilateral relations between India and Bangladesh.

Source: Indian Railways



Air Connectivity

Air connectivity in Northeast India has grown rapidly over the past decade, improving regional access, supporting tourism, and facilitating economic development under initiatives like the UDAN scheme.

Growth in Airports and Traffic

- Operational airports increased from 9 in 2013 to 19 in 2024.
- Passenger and cargo traffic rose by 113% over the last decade.

UDAN Scheme Impact

- 194 fixed-wing and helicopter routes were awarded in the Northeast.
- Enhanced accessibility, boosted tourism, encouraged investment, and improved ease of doing business.

Small Airports & Helicopter Facilities

- Several small airports are being developed for 20-seater aircraft under UDAN, with airports like Pasighat, Tezu, and Baljek seeing upgrades to support such operations.
- Helicopter connectivity is already operational on multiple routes, with operators linking remote locations and improving last-mile access.

Airline Expansion Efforts

- Alliance Air introduced new services linking Imphal with Kolkata, Guwahati, and Dimapur. Fares capped at ₹5,000 to make air travel more affordable.
- Strengthened connections from Guwahati, Agartala, and Imphal to major domestic and international destinations.
- IndiGo launched direct flights between Agartala and Dibrugarh, improving access for business and leisure travelers.

These developments aim to integrate the region better with the rest of India and support its growing economic and tourism potential.

Sources: Alliance Air, Air India Express, IndiGo

Waterway Connectivity

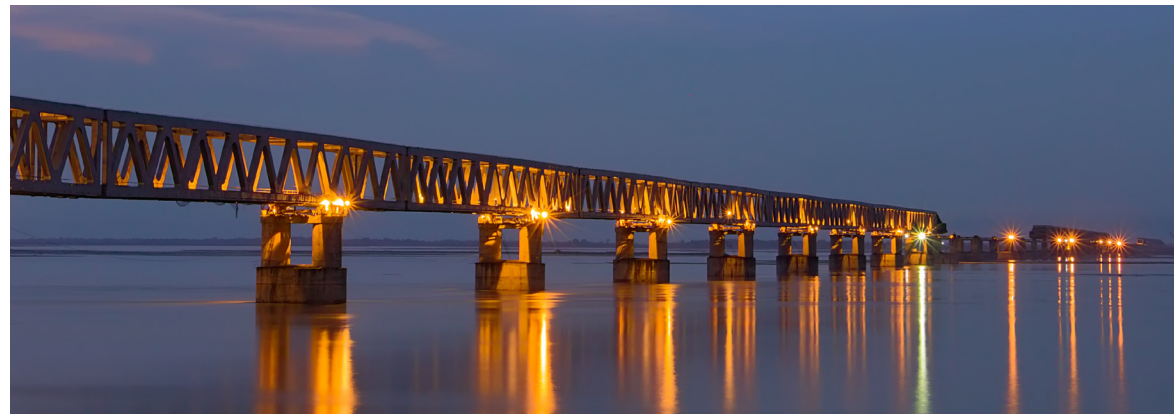
Inland water transport in Northeast India has seen considerable progress under the Sagarmala program, aimed at promoting eco-friendly and cost-effective transport in the region.

Project Investments & Expansion

- Projects worth over ₹1,000 crore have been initiated under the Ministry of Ports, Shipping and Waterways.
- The number of operational waterways has increased to 20, with 19 added in the last 10 years.

Infrastructure Development

- Six ferry terminals are being constructed in Assam at a cost of ₹310 crore.



Cross-border Connectivity

- The Indo-Bangladesh Protocol on Inland Water Transit and Trade (PIWT&T) includes: 10 routes; 1 ports of call; 2 extended ports in each country.

Cargo Movement, Enhancing Economic Development

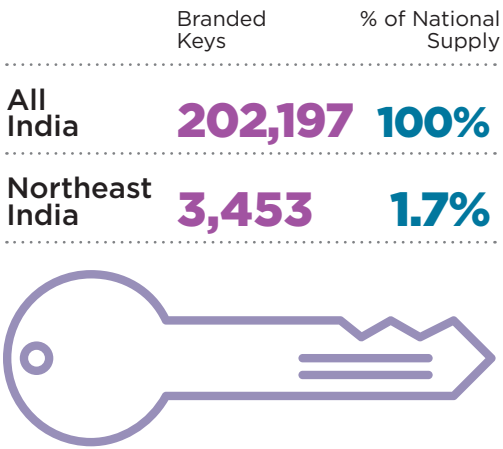
- Approximately 4.7 million tonnes of cargo were transported through these waterways in FY 2023-24.

These infrastructure initiatives will significantly boost tourism in the Northeastern Region by improving accessibility to its remote and scenic destinations. Enhanced road and rail connectivity will make travel within and to the region more convenient, while upgraded airports and new flight routes under the UDAN scheme will attract both domestic and international tourists. Waterway development, including new ferry terminals and inland routes, will offer unique travel experiences and open lesser-known locations. With smoother, safer, and more efficient transport options, tourists will find it easier to explore the Northeast's rich cultural heritage, diverse landscapes, and eco-tourism offerings, ultimately positioning the region as a key tourism hub in India.



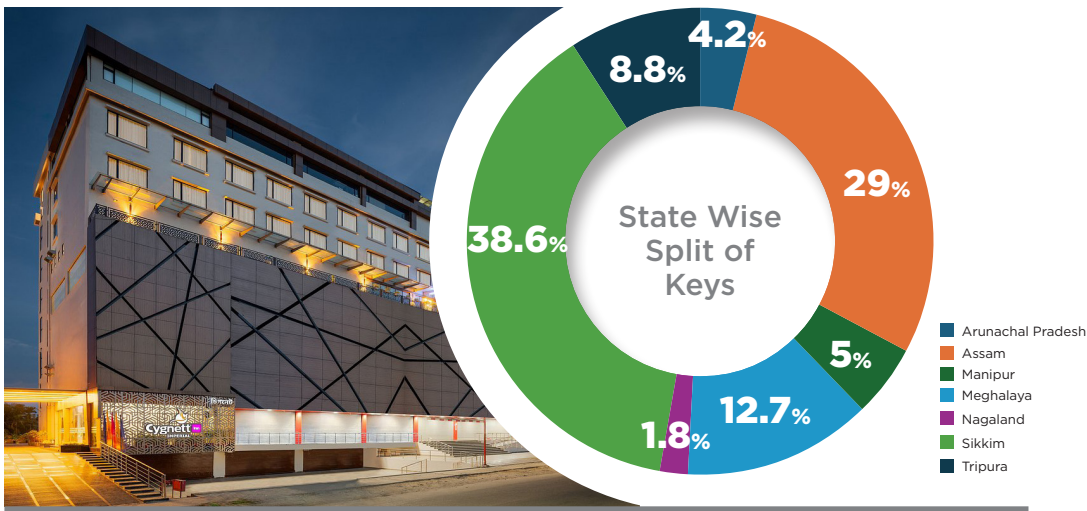
Existing Branded Hotel Supply

Hotel development activity in Northeast India has gained traction in recent years, though the region remains significantly underpenetrated in terms of branded supply. As of June 2025, the Northeast accounted for over 3,400 branded hotel keys, just 1.7% of India's overall branded inventory of approximately 202,000 rooms.



State Wise Split of Keys

Sikkim and Assam lead the way, together representing nearly 68% of the region's existing supply, with Gangtok and Guwahati alone contributing more than half of the region's branded hotel inventory. Meghalaya and Tripura follow, with over 400 and 300 keys, respectively. In contrast, Nagaland, Arunachal Pradesh, and Manipur remain heavily underserved, each with fewer than 200 branded keys, while Mizoram currently has no branded hotel presence at all, highlighting the significant white space and first-mover potential for brands.



Source: HVS ANAROCK Research

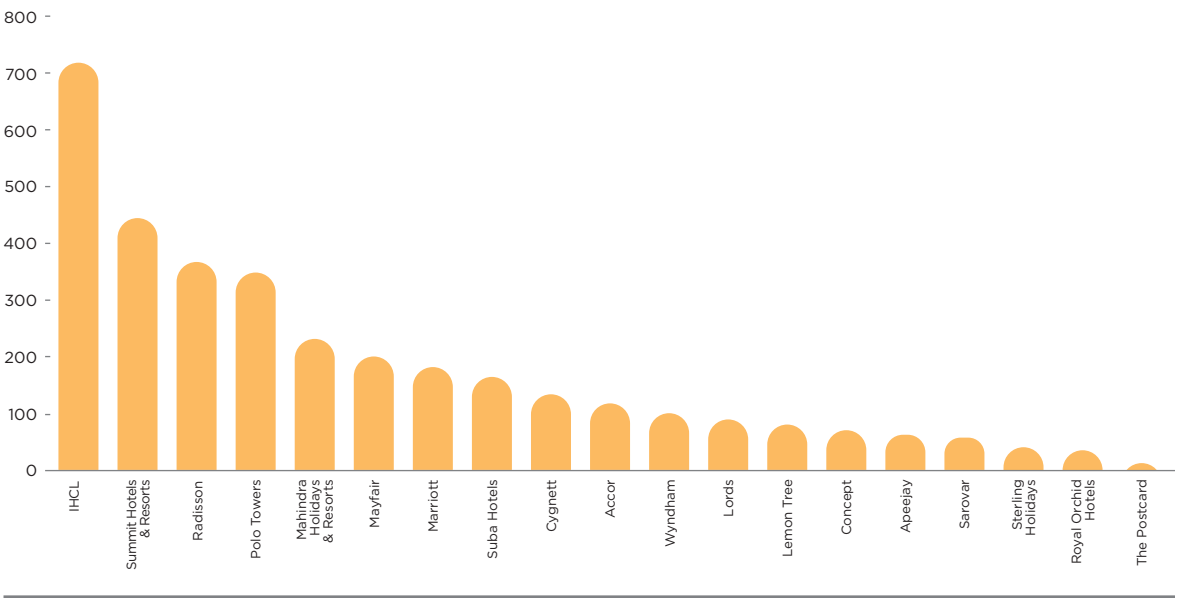
Operator Wise Split of Keys

Nationally, the branded hotel market is led by large operators like IHCL, Marriott, and Radisson, which together account for over 60,000 keys, reflecting their deep penetration across key Indian markets. In contrast, the Northeast remains underpenetrated, with only a handful of players like IHCL, Summit Hotels, Radisson, Polo Towers, and Mayfair, having established a

notable presence. The presence of global brands remains limited and largely confined to select urban hubs, highlighting a clear opportunity for broader regional expansion and diversification.



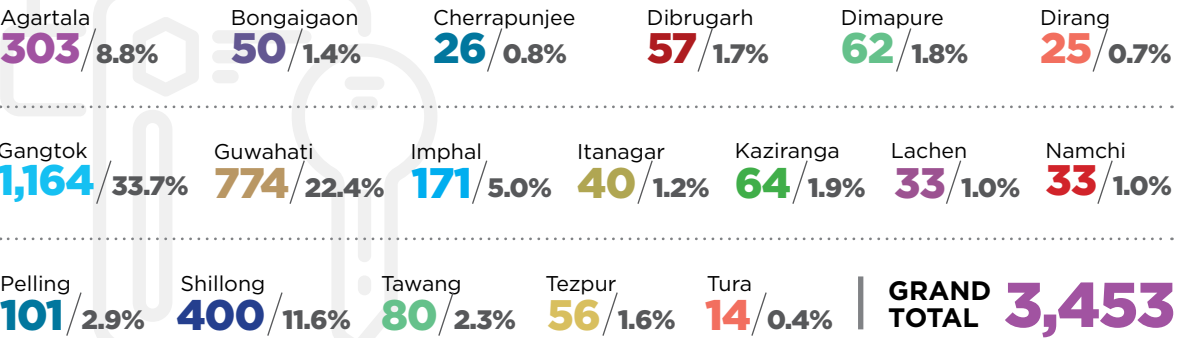
Number of keys (as of 30th June 2025)



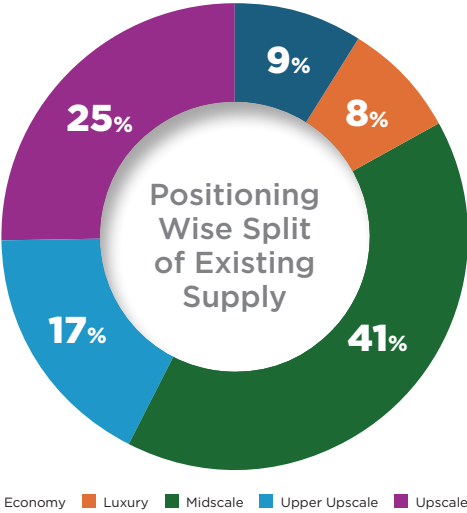
Source: HVS ANAROCK Research

Gangtok and Guwahati together account for over 56% of Northeast India's branded hotel inventory, reflecting the heavy concentration of supply in key urban and leisure hubs. In comparison, cities like Shillong (400 keys) and Agartala (303) continue to trail behind, while several high-potential destinations such as Kaziranga, Dirang, and Lachung have fewer than 70 branded keys each. This pronounced skew highlights significant white space across the region, offering strong first-mover opportunities for hotel brands and investors looking to tap into emerging destinations beyond the established tourism centers.

City Wise Concentration of Keys



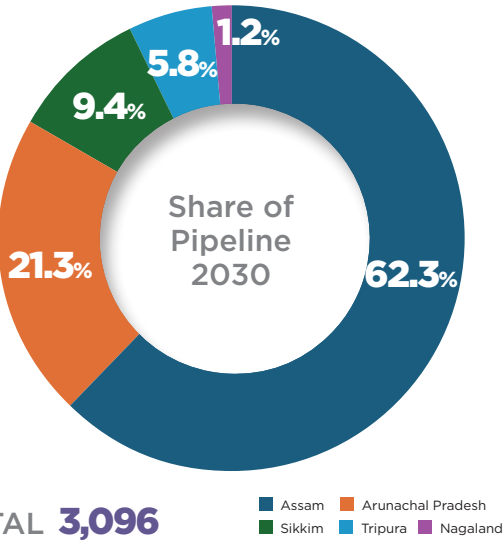
Source: HVS ANAROCK Research; Number of keys and share in supply in the region



Source: HVS ANAROCK Research; Data as of 30th June 2025

Positioning Wise Split

The branded hotel supply in Northeast India is distinctly dominated by midscale segment, which accounts for nearly 41% of total inventory, reflecting the region's current appeal to value-driven domestic travelers. While the economy (9%) and luxury (8%) segments are present, they remain relatively modest in scale. Interestingly, the upper upscale (17%) and upscale (25%) categories together represent approximately a third of the market, signaling an emerging demand for higher-end hospitality experiences in key locations.



TOTAL 3,096

Assam Arunachal Pradesh Sikkim Tripura Nagaland

Source: HVS ANAROCK Research; Data as of 30th June 2025

Branded Pipeline Supply

Encouragingly, the region is expected to nearly double its branded supply by 2030, with over 3,000 new keys in the pipeline across Assam, Arunachal Pradesh, Sikkim, Tripura, and Nagaland, reflecting rising developer confidence in the region's tourism potential.

Assam is set to lead the hospitality expansion in Northeast India, with nearly 2,000 branded hotel keys in the pipeline between 2025 and 2030, driven largely by Guwahati and other emerging tourism hubs. Arunachal Pradesh follows with a robust pipeline of 660 rooms, signaling rising investor confidence in destinations



like Tawang and Itanagar. Sikkim continues its upward trajectory with over 250 planned keys, reinforcing its position as a premium eco-tourism market. Meanwhile, Tripura is set to expand its presence in the branded hospitality space with 80 additional keys scheduled for 2026, and another 100 keys by 2030, building on its existing supply and marking a crucial step toward strengthening the state's organized tourism infrastructure.

While the supply is expected to double by 2030, the region will still account for less than 3% of India's total projected branded supply, highlighting the vast untapped potential that remains, especially in states like Mizoram, Nagaland, and Meghalaya, where no new branded hotel developments are currently visible. Investor focus remains heavily skewed toward Assam. With domestic travel surging, strong government support through schemes like UDAN and Swadesh Darshan 2.0, and growing demand from experience-driven tourists, supply is likely to lag in several high-potential areas without more balanced regional investment.

Opportunity Knocks

Northeast's
Next Big
Tourism Bets

Northeast India is a treasure trove of diverse tourism experiences, offering something for every traveler. The region presents multiple opportunities for sustainable and experiential tourism.

Eco-Tourism

Northeast India's unparalleled natural beauty and biodiversity make it an ideal destination for eco-tourism. The region is home to lush forests, serene lakes, and majestic mountains, offering travelers a chance to connect with nature while promoting conservation. Several states in the region can become eco-tourism champions.

Sikkim, recognized as the world's first fully organic state, has implemented progressive measures such as plastic-free zones and community-managed homestays, attracting over 1.3 million visitors in a single year. Meghalaya's iconic living root bridges, ingeniously crafted by Khasi and Jaintia tribes, exemplify sustainable engineering intertwined with tradition. Assam's Kaziranga and Manas National Parks, renowned for their successful conservation of the one-horned rhinoceros and Bengal tiger, are examples of responsible tourism. States like Mizoram and Tripura further champion low-impact travel through policies that prioritize forest conservation and renewable energy. These examples collectively showcase how Northeast India is not only preserving its fragile ecosystems but also leveraging them to promote sustainable livelihoods and attract eco-conscious travelers from around the world.

Adventure Tourism

The Northeast's rugged terrain, marked by plunging valleys, turbulent rivers, and snow-laden passes, creates a playground for adventure and thrill enthusiasts.

Opportunities range from trekking and mountaineering to white-water rafting and paragliding. For instance, Sikkim's mountain trails, like the Goecha La trek, and the Dzüko Valley in Nagaland offer breathtaking Himalayan vistas and challenging routes for trekkers, cyclists and hikers. The Siang River in Arunachal Pradesh is renowned for its white-water rafting experiences, while Meghalaya's crystal-clear rivers are ideal for kayaking and river rafting. Paragliding and zip-lining are gaining popularity in destinations like Meghalaya, Arunachal Pradesh, and Sikkim, attracting adventure enthusiasts from across India and beyond.



Cultural Tourism

Home to over 100 indigenous communities, the Northeast is a living canvas of cultural diversity, making it an ideal destination for cultural tourism. Visitors can experience the region's rich heritage through its vibrant festivals, traditional music, dance, crafts, and cuisine. Notable examples include, Nagaland's Hornbill Festival, dubbed the "Festival of Festivals," which unites 17 Naga tribes in a vibrant display of their cultural heritage and traditional sports like bamboo climbing. Assam's Bihu, Manipur's Sangai Festival, and Tripura's Goria dance are other cultural highlights that can draw tourists. Heritage homestays, often hosted by tribal families, and craft melas can offer immersive cultural tourism experiences, blending ancient traditions with modern hospitality by allowing travelers to engage with local communities and artisans.



Wildlife Tourism

Northeast India's dense forests and protected reserves are havens for wildlife enthusiasts. The region is home to some of India's most biodiverse habitats, sheltering rare and endangered species. Kaziranga and Manas National Parks, both UNESCO World Heritage Sites in Assam, are famous for the endangered one-horned rhinoceros and elusive Bengal tiger. Namdapha National Park in Arunachal Pradesh shelters snow leopards and red pandas, while Mizoram's Dampa Tiger Reserve and Meghalaya's Balpakram National Park enchant with their pristine wilderness. Conservation programs, including anti-poaching patrols and community-led ecotourism, safeguard these habitats. Wildlife circuits, supported by trained naturalists and eco-lodges, provide immersive safaris while channeling tourism revenue into local economies, ensuring both ecological and social benefits.

Spiritual Wellness

The region's serene landscapes, ancient monasteries and sacred sites offer a sanctuary for wellness and spiritual seekers. Assam's Kamakhya Temple, a revered Shakti Peeth, draws millions for its tantric rituals, while Tripura's Tripura Sundari Temple exudes spiritual energy. Sikkim's ancient monasteries, like Rumtek and



Pemayangtse, provide tranquil settings for meditation, complemented by yoga retreats nestled in forested Himalayan valleys. Organic wellness resorts in Meghalaya and Arunachal emphasize holistic healing with indigenous herbal therapies and farm-to-table cuisine. State policies promote this segment by preserving sacred groves and supporting eco-conscious retreats, creating a seamless blend of mindfulness and sustainable tourism.

Tea Tourism

Tea tourism in the Northeast is rapidly gaining momentum as a vibrant trend, drawing tourists to the region's lush tea estates and cultural richness. Assam, with over 800 tea gardens, is at the heart of India's tea industry offering tourists immersive experiences such as tea-plucking, factory tours, and tastings of robust Assam blends. Notable examples include heritage plantations like Monabarie and Harmutty, which offer bungalow stays and curated tea trails. Festivals like the Assam Tea Festival and growing digital promotion of tea trails in Meghalaya and Arunachal Pradesh amplify the region's appeal. Tripura and Sikkim are emerging as new hubs, with eco-friendly estates and homestays.



Medical Tourism

Northeast India's growing potential in medical tourism stems from its strategic location and expanding healthcare capacity in Assam and beyond. Assam now hosts 14 operational government medical colleges, including AIIMS Guwahati, with plans of further expansion, to ensure every district has access to tertiary care. Patients from neighboring countries like Bhutan (and potentially Bangladesh and Myanmar) are increasingly seeking quality treatment in Assam due to its proximity and affordable care. The state has even reserved MBBS seats specifically for Bhutanese nationals and is planning a MoU with Bhutan's health ministry to facilitate cancer treatment at the Darrang Cancer Centre. With its strengthening medical infrastructure and growing cross-border appeal,





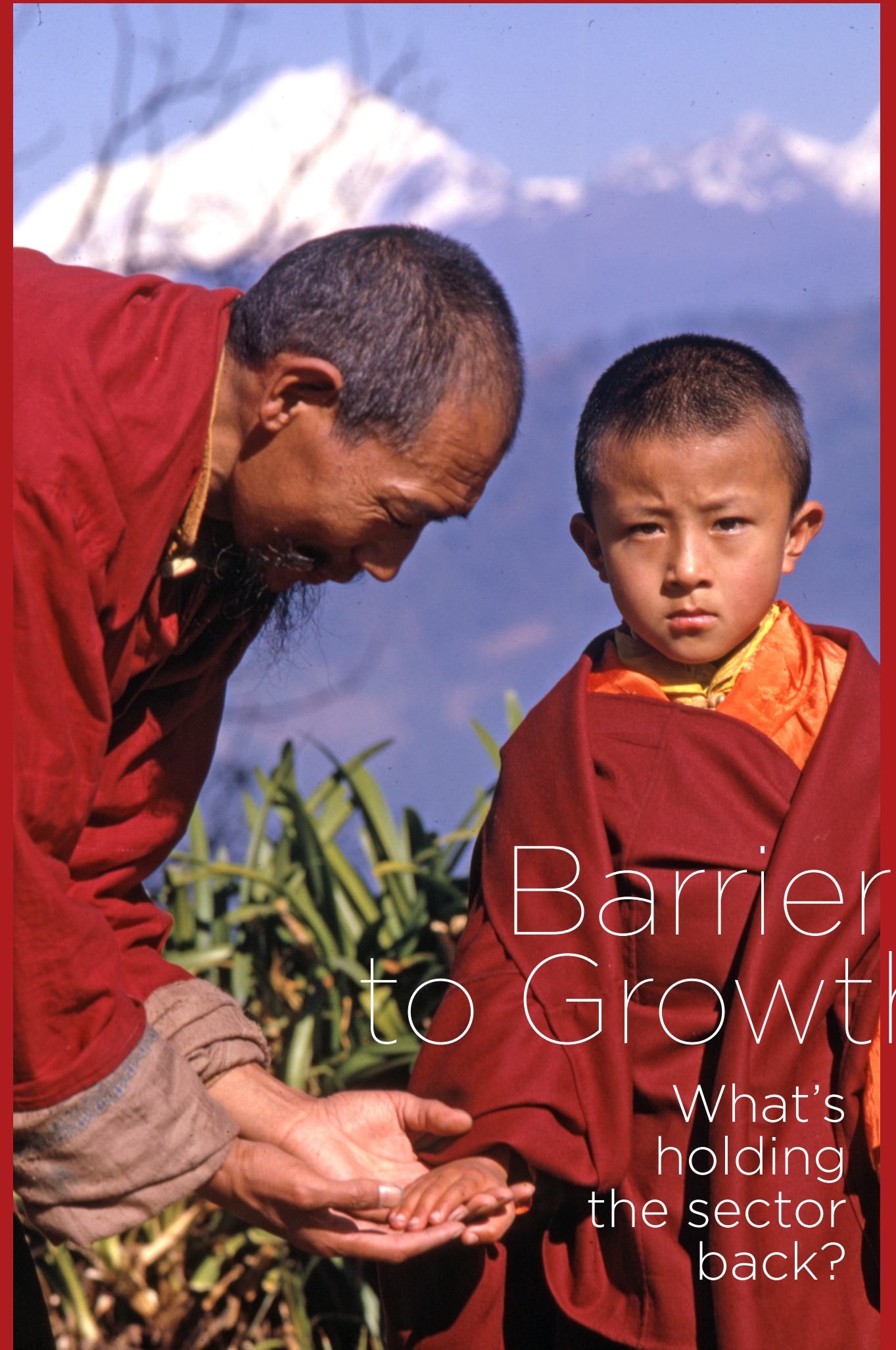
A promising opportunity for Northeast India lies in creating multi-state tourism circuits that connect two or three neighboring states through carefully designed themes.

the region is well placed to emerge as a trusted hub for advanced yet affordable healthcare in the eastern corridor of South Asia.

Tourism Circuits

A promising opportunity for Northeast India lies in creating multi-state tourism circuits that connect two or three neighboring states through carefully designed themes. Instead of attempting to cover all eight states in one trip, smaller circuits such as combining Assam's Kaziranga National Park with Meghalaya's caves and Arunachal Pradesh's monasteries could offer more immersive and manageable experiences. Such collaborative packages have the potential to encourage longer stays and inspire tourists to explore a richer mix of landscapes and cultures in one journey. Coordinated branding efforts, shared marketing campaigns, improved cross state transport links and integrated digital booking platforms could further enhance the appeal and accessibility of these circuits, helping position the Northeast as a more connected and attractive tourism region.

Together, these diverse tourism opportunities not only highlight the region's vast potential but also provide a foundation for sustainable and inclusive growth. By leveraging these strengths, Northeast India can position itself as one of Asia's most dynamic and distinctive tourism destinations.



Barriers to Growth

What's holding the sector back?

Northeast India is a region of immense promise, with its breathtaking landscapes, vibrant cultures, unique biodiversity, rich heritage, and unparalleled opportunities for sustainable tourism. In recent years, all eight states have developed or revamped their tourism policies, each emphasizing sustainability, cultural preservation, and community-led tourism. However, the region continues to struggle with a set of persistent and evolving challenges.

Policy-implementation Gap

While Northeast India's states have introduced comprehensive tourism policies, there remains a significant gap between policy design and on-ground execution. Many initiatives, such as single-window clearance for tourism projects, capital subsidies, and eco-tourism incentives, are either underutilized or remain unknown to key stakeholders, partly due to limited awareness, cumbersome approval processes, and the absence of clear monitoring and evaluation mechanisms.

Gaps in Tourism Infrastructure

While connectivity across Northeast India has seen notable improvements, such as reduced road travel times between cities like Itanagar and Guwahati and the expansion of regional airports and helicopter services, significant infrastructural gaps remain. Air travel is concentrated around a few key airports such as Guwahati, Imphal, and Dibrugarh, while many promising destinations have limited or seasonal connectivity. Road infrastructure, especially in hilly terrains, is prone to landslides, and rail coverage is sparse. These challenges not only impact tourist accessibility but also increase travel time, making multi-

destination itineraries difficult to develop. Last-mile connectivity, crucial for immersive tourism experiences, remains inadequate.

Fragmented Marketing and Inconsistent Brand Visibility

Despite its distinct offerings, Northeast India is still not prominently positioned within mainstream travel narratives. While efforts to promote the region have gained some momentum in recent years through campaigns such as "Northeast India - Unexplored Paradise", festivals, and digital storytelling, the outreach remains limited in scale and consistency. State-level initiatives are often fragmented, and there is a lack of coordinated, pan-regional marketing targeting national and international audiences. As a result, awareness of the region's destinations, cultural events, and tourism potential remains relatively low, even among domestic travelers.



Talent and Capacity Gaps

Although state policies emphasize capacity-building and skill development, the region faces a persistent skills gap. Many local entrepreneurs, including homestay operators, adventure tourism providers, and cultural guides, lack the necessary training to deliver high-quality experiences. This challenge is further compounded by out-migration, with many young people from the Northeast seeking employment in other parts of India. The absence of strong partnerships with hospitality training institutes and limited access to professional courses restrict the growth of a skilled local workforce.

Limited Private Sector Engagement

Despite offering a range of incentives under state tourism policies, private investment in Northeast India's tourism sector remains limited. Investors are often deterred by inconsistent regulations across states, cumbersome approval processes, and perceptions of political instability. Additionally, the lack of a harmonized regional investment framework means that investors must navigate state-specific rules, increasing their operational complexity.

Perception and Safety Concerns

The Northeast has historically faced concerns related to political unrest and insurgency, which continue to influence perception. While most of the region is peaceful today, sporadic incidents, especially in border or conflict-prone areas, create uncertainty among potential tourists. These concerns, often amplified by the lack of updated information or disproportionate media coverage, can lead to hesitancy in travel planning, particularly among international visitors and organized tour operators.



Regulatory complexities and the lack of seamless visa and travel arrangements with neighboring countries continue to limit the potential for integrated cross-border tourism circuits.

Geopolitical and Cross-border Challenges

The region's location, bordering five countries, brings both opportunity and complexity. Tensions along the India-China border from time to time, coupled with ongoing instability in Myanmar, have implications for infrastructure development and tourism movement in eastern and frontier areas. More recently, shifts in political dynamics in Bangladesh have also introduced uncertainties around the timely execution of cross-border projects and connectivity initiatives. Some infrastructure and tourism-related collaborations have been delayed or suspended due to these evolving geopolitical developments. Additionally, regulatory complexities and the lack of seamless visa and travel arrangements with neighboring

countries continue to limit the potential for integrated cross-border tourism circuits.

Balancing Growth and Sustainability

Northeast India's rich biodiversity and cultural heritage are both assets and vulnerabilities. While several state policies promote eco-tourism and responsible tourism, the absence of clear sustainability guidelines, waste management systems, and regular environmental impact assessments has led to localized ecological degradation. Though overall tourist footfall in the Northeast remains modest, popular sites such as Kaziranga, Cherrapunji, and Tsomgo Lake experience seasonal surges, raising early concerns around ecological sensitivity, infrastructure strain, and the potential erosion of local cultural practices if growth is not carefully managed.

Weak Inter-state Coordination

The eight states of Northeast India often operate in silos when it comes to tourism development. While each state has its own tourism policy, there is limited collaboration on cross-state circuits, joint marketing efforts, or even shared best practices. As a result, the region is unable to present itself as a cohesive, interconnected destination. The absence of a dedicated Northeast Tourism Coordination Forum further weakens regional synergies.



Lessons from Gujarat, Kerala, and Rajasthan’s tourism turnarounds

Across India, some states have successfully transformed themselves into tourism powerhouses, each following a distinct model grounded in their geography, culture, and vision. Gujarat harnessed large-scale branding and infrastructure to attract domestic footfall; Kerala led with authenticity, wellness, and community participation; and Rajasthan reinvented its heritage to create a globally recognized travel identity. These stories are not just retrospective successes, they offer valuable blueprints for Northeast India as it seeks to unlock its tourism potential.

Gujarat’s Tourism Playbook
Branding, Investment, Infrastructure

Until the late 2000s, Gujarat remained relatively low on the tourism radar despite its rich historical, ecological, and cultural assets. This changed dramatically with the launch of the “Khushboo Gujarat Ki” campaign in 2010, an integrated marketing effort that transformed the state’s tourism profile.



WHAT MADE IT A SUCCESS?

1. A strong, consistent branding strategy

The “Khushboo Gujarat Ki” campaign featured actor Amitabh Bachchan as brand ambassador, delivering a powerful narrative of culture, spirituality, wildlife, and heritage. It showcased attractions like:

- The Rann of Kutch
- Gir National Park (the only natural habitat of the Asiatic lion)
- The Somnath and Dwarka temples
- The Buddhist circuit in Gujarat
- The Sabarmati Ashram, among others

This high-impact, emotionally resonant messaging was rolled out across TV, print, digital platforms, airports, international

travel fairs, and tourism expos, ensuring wide visibility and recall.

2. Government-led infrastructure push

Tourism development was supported by major public investments in:

- Airport, rail and road connectivity to improve last-mile connectivity to even remote destinations like Kutch and Sasan Gir
- Large-scale projects like the Statue of Unity, which has become one of India’s most visited tourist sites



- Improved tourist amenities, signage, and accommodation infrastructure under the Gujarat Tourism Policy
- Tourism funding has increased over the years; Gujarat State Budget 2025-26 proposed a 31% increase in funding

3. Policy support and private sector participation

The state’s tourism policy provided:

- Industry status to tourism ventures
- Land and capital subsidies
- Single-window clearance mechanisms
- Incentives and subsidies for setting up hotels, wellness resorts, amusement parks, convention centers and other tourism development projects
- Dedicated policies for Heritage Tourism, Cinematic Tourism, Homestays etc.

These steps fostered a pro-investment climate and encouraged local entrepreneurship.

4. Diversified product offerings

Beyond religious and heritage tourism, Gujarat is investing in niche tourism segments such as:

- Adventure & wildlife tourism
- River cruise tourism
- Wellness & Eco-tourism
- Festival tourism (Rann Utsav, Navratri, International Kite Festival)

This diversification helped attract different traveler segments, such as domestic, international, budget, luxury, and niche.

THE IMPACT

Tourist visits grew 9x from ~20 million in 2010 to

180 MILLION in 2023

Statue of Unity alone attracted >50LAKH visitors in 2023

Ranked among the top 5 Indian states for domestic tourism in recent years

Contribution of Tourism to state GVA 8-10%



Kerala's Tourism Playbook

Iconic Branding, Diversification, Reinvention

Kerala's tourism journey is widely regarded as one of the most successful examples of destination branding and community-led tourism in India. From being a relatively unknown state on India's tourism map in the 1980s, Kerala transformed into a global travel hotspot through strategic marketing, policy alignment, and grassroots participation.

WHAT MADE IT A SUCCESS?

1. Iconic branding: "God's Own Country"

In early 1990s, Kerala Tourism launched the "God's Own Country" campaign, one of the first government-backed efforts to brand a destination in India. This identity positioned Kerala as a serene, spiritual, and nature-rich experience, appealing to both domestic and international travelers. The campaign focused on Kerala's unique blend of backwaters and houseboats, lush hill stations and monsoons, traditional art forms and festivals and Ayurveda and wellness tourism.

2. Diversified tourism offerings

The state expanded its tourism portfolio beyond traditional attractions to include:

- **Natural Beauty:** from beaches and backwaters to hill stations and wildlife sanctuaries
- **Ayurveda and Wellness:** Promoting traditional healing practices and wellness retreats
- **Backwater and Houseboat Experiences:** Offering unique stays and cruises in the tranquil backwaters
- **Cultural and Festival Tourism:** Showcasing vibrant festivals, art forms, and heritage sites
- **MICE Tourism:** promoting the cities as preferred MICE destination

3. Government as enabler

Kerala's tourism policy fostered:

- Community-based tourism through rural tourism clusters and homestays
- Infrastructure development along identified circuits (backwaters, Ayurveda centers, heritage towns)
- Support for SMEs in hospitality and craft sectors
- Capacity building via training for homestay owners, guides, and Ayurveda practitioners

The government played a facilitating role, partnering with private stakeholders and local communities to deliver high-quality experiences.

4. Reinvention through storytelling

Kerala Tourism has consistently evolved its messaging:

- "Your Moment is Waiting" campaign focused on emotional connection
- "Change of Air" was launched post-COVID to highlight health, nature, and rejuvenation
- Ayurveda and wellness were smartly repositioned as year-round attractions

It leveraged video storytelling, influencer campaigns, and high-quality cinematography to connect with digital-native travelers. This adaptability kept the brand fresh without losing authenticity.

5. Strong international positioning

Kerala consistently engaged with global tour operators and trade shows, ensuring strong awareness. As a result:

- National Geographic listed Kerala among the Top 10 Paradises on Earth
- Lonely Planet called it a true paradise
- Kerala won multiple World Travel Awards for Asia's Leading Responsible Tourism Destination.



THE IMPACT

In 2023, Kerala recorded **22.5 MILLION** tourist arrivals, up from **9 million** in 2010

Tourism contributes to **~12%** of Kerala's GDP

Rajasthan's Tourism Playbook

Heritage, Experiences, Execution

Rajasthan, with its rich royal heritage, vibrant culture, and desert landscapes, has long held a place in India's tourism imagination. But what truly elevated it into one of the most visited states in India was its ability to translate this legacy into curated tourism experiences, supported by strong branding, infrastructure, and heritage preservation.



The branding successfully evoked a sense of nostalgia and grandeur, drawing both domestic and global tourists in search of immersive heritage experiences.

- Conserve cultural heritage
- Create unique stay experiences
- Generate employment and revive dying crafts

3. Diverse tourism products and experiences

The state didn't rely solely on heritage; it developed a diversified tourism portfolio, including:

WHAT MADE IT A SUCCESS?

1. Heritage as the foundation of brand Rajasthan

Rajasthan's tourism identity is deeply rooted in its royal past, forts, palaces, havelis, and grand festivals. The state government capitalized on this appeal with consistent positioning around:

- "Padharo Mhare Desh" (Welcome to My Land), a culturally rooted slogan
- Signature destinations like Jaipur, Udaipur, Jodhpur, Jaisalmer, and Pushkar
- Visual storytelling featuring desert landscapes, folk art, camel fairs, and royal hospitality

The branding successfully evoked a sense of nostalgia and grandeur, drawing both domestic and global tourists in search of immersive heritage experiences.

2. Robust public-private partnerships in Heritage Tourism

Rajasthan pioneered adaptive reuse of heritage properties by facilitating conversions of old forts and palaces into heritage hotels, an area where the private



THE IMPACT

Rajasthan received **>180 MILLION** domestic tourists and foreign tourists in 2023, nearly **7x** the number in 2010

Ranked consistently in the top 5 states in India for domestic and foreign tourist visits

Tourism's contribution to state GVA is **7.48%**

- Destination weddings at Jaipur, Udaipur and Jaisalmer
- Desert tourism in Jaisalmer and Bikaner
- Wildlife tourism in Ranthambore and Sariska
- Cultural tourism through fairs, festivals, and folk traditions
- Rural and craft tourism in places like Bishnoi and Shekhawati
- Luxury train tourism with Palace on Wheels and Royal Rajasthan on Wheels

This created year-round demand and catered to varied traveller interests.

4. Policy support and infrastructure expansion

The Rajasthan Tourism Policy is focused on:

- Tourism zones and circuits with customized incentives
- Single-window clearance for tourism projects
- Investment subsidies and support for MSMEs in tourism
- Enhanced air and road connectivity to tier-2 towns and border areas

The policy also emphasized sustainability and community involvement, especially in eco- and rural tourism. A new draft policy was introduced in 2024.

5. Aggressive domestic and international marketing

Rajasthan maintained high visibility through:

- Campaigns at airports, metros, and global trade fairs
- Digital media storytelling featuring festivals like Pushkar Fair & Desert Festival
- Collaborations with Bollywood & international production houses and movies.

Unlocking Growth

Strategic Recommendations

The Northeast holds immense potential to become one of India's leading tourism destinations, driven by its ecological richness, cultural depth, and unique geography. Realizing this promise, however, requires sustained focus across policy, infrastructure, branding, and community engagement. Drawing from the success stories of Gujarat, Kerala, and Rajasthan, the following recommendations are tailored to the region's distinct needs.

Close the Policy-implementation Gap with Robust Monitoring

While the states in Northeast India have developed detailed tourism policies, their impact has been limited due to weak implementation. To bridge this gap, a robust monitoring and evaluation framework should be established at the regional level, ensuring that policy initiatives translate into actionable outcomes. Within each state, dedicated monitoring cells under tourism departments can track progress, identify bottlenecks, and report regularly. Annual policy impact assessments should be conducted, with findings made publicly accessible to enhance transparency and stakeholder confidence.

Improve Connectivity and Last-mile Access

Improving physical connectivity is essential for increasing tourist inflow in Northeast India. While air connectivity has improved under the UDAN scheme, there is a need to further expand direct flights to underserved destinations and strengthen road and rail access, particularly in remote areas. A focused, multi-modal connectivity strategy should be developed, prioritizing last-mile access with shuttle services, electric vehicles, and well-marked tourist circuits. Given the region's vulnerability to landslides and heavy monsoon rains, infrastructure must adopt climate-resilient design principles, including robust drainage, erosion control, and weather-adaptive materials.

Lessons can be drawn from states like Himachal Pradesh, where infrastructure upgrades have had a transformative impact. The opening of the Atal Tunnel in 2020 dramatically transformed access to Lahaul & Spiti, a region previously cut off during winters due to heavy snowfall. With round-the-year connectivity now in place, tourist footfalls rose from 1.3 lakh in 2019 to over 10.6 lakh in 2024—an eightfold increase. This example highlights how targeted infrastructure investment can unlock remote destinations and catalyze tourism growth.



Build a Unified Brand Identity for the Northeast

Northeast India's diverse cultural and natural offerings are a strength, but fragmented marketing has limited their impact. A cohesive branding strategy should be developed, relaunching the "Northeast India - Unexplored Paradise" campaign under a refreshed narrative that highlights adventure, wellness, spirituality, and cultural richness. This can be amplified through partnerships with global travel platforms like Airbnb, Booking.com, and MakeMyTrip, leveraging digital content to build awareness. Strategic partnerships with celebrities, influencers, and global media can further enhance the region's visibility. Assam's recent inclusion in The New York Times' "52 Places to Go in 2025" offers an entry point to global recognition.

Introduce Uniform and Investor-friendly Policies

Despite offering various incentives, the region struggles to attract private investment in tourism due to regulatory complexities. A harmonized tourism investment framework should be introduced across all eight states, providing clear guidelines for investors and minimizing procedural hurdles. This can be supported by a single-window clearance platform for tourism investments, ensuring faster approvals and transparency. Special Tourism Zones can be developed in key areas and tourism circuits, offering pre-approved clearances and enhanced infrastructure support for sustainable tourism projects.

Promote Sustainable, Community-led Tourism Models

Northeast India's strength lies in its cultural diversity and pristine landscapes, making it ideal for community-driven tourism. Dedicated programs should be introduced to support local entrepreneurs in developing homestays, cultural trails, eco-tourism experiences, and village tours. Local art, craft, and cuisine should be integrated into the tourism experience, ensuring that economic benefits directly reach local communities. A targeted capacity-building program can provide training, certification, and financial support to local entrepreneurs, ensuring quality service delivery.

Invest in Skill Development and Local Capacity Building

Despite having a young and dynamic population, the region faces a persistent skills gap in tourism and hospitality. Strategic partnerships should be established with leading tourism and hospitality training institutions, local universities, and digital platforms to deliver region-specific training. Mobile training units can reach remote areas, offering courses in digital marketing, storytelling, hospitality management, and language skills. Special focus should be placed on empowering women and youth through scholarships and mentorship programs.

Facilitate Access to Finance and Incentivize Investment

Access to finance remains a barrier for local tourism entrepreneurs in Northeast India. A dedicated tourism financing scheme should be introduced, offering low-interest loans, seed grants, and viability gap funding for small businesses. States can also establish Special Tourism Zones with infrastructure support and partner with development finance institutions for concessional credit lines. Sustainability-linked investment incentives can further align goals, encouraging eco-friendly tourism ventures.

Develop Cross-border Tourism Circuits

Given its strategic location, Northeast India is well-placed to serve as India's gateway to Southeast Asia. However, this potential is yet to be fully realized. Cross-border tourism circuits can be developed, starting with Bhutan, Bangladesh, and Myanmar, focusing on shared cultural, ecological, and adventure themes. Existing initiatives, such as the India-Bangladesh Protocol Routes and the Kaladan Multimodal Transit Project (India-Myanmar), should be fast-tracked. Regional collaboration should also be pursued through platforms like BIMSTEC (Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation), with simplified visa processes, cultural exchange programs, and joint marketing campaigns to attract international travelers.

Globally, the success of the Mekong Tourism Corridor, a collaborative initiative between Cambodia, Thailand, Laos, and Vietnam, offers a compelling blueprint. These countries created integrated circuits under the Greater Mekong Subregion (GMS) framework, facilitating multi-country itineraries, harmonized marketing, and joint visa schemes. The result was a consistent increase in tourist flows, deeper regional cooperation, and shared economic benefits.

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Tourism in the Northeast must grow in a way that preserves the region's ecological and cultural heritage.

Create a Framework for Responsible Growth

Tourism in the Northeast must grow in a way that preserves the region's ecological and cultural heritage. Clear sustainability guidelines should be developed for all tourism operators, covering waste management, energy efficiency, and resource conservation. Destination-level carrying capacity assessments should be conducted, and major tourism projects must undergo environmental impact assessments, with approvals linked to compliance with sustainability norms. Regular

monitoring, supported by local authorities, can ensure that tourism growth aligns with sustainability goals.

Strengthen Inter-state Coordination and Develop Regional Tourism Circuits

Tourism development in the Northeast calls for stronger alignment across the eight states and more integrated engagement with central ministries. While efforts such as the NITI Forum for North-East and the recently constituted High-Level Task Force (HLTF) by the Ministry of DoNER (Development of North Eastern Region) and Ministry of Tourism reflect a growing recognition

of the region's tourism potential, there is scope for a more focused and sector-specific approach. Building on these foundations, a dedicated coordination platform can be established, comprising representatives from state tourism departments, the Ministry of Tourism, Ministry of DoNER, and private sector stakeholders. This platform would streamline policies, reduce duplication, and foster a unified vision for tourism planning and promotion.

Beyond policy coordination, the region must leverage its diverse attractions to develop collaborative, multi-state tourism circuits. The eight states can collectively design thematic circuits, such as adventure trails, spiritual journeys, wildlife expeditions, and cultural heritage tours, that offer seamless, immersive travel experiences. Such circuits would enable tourists to explore the region as a connected, diverse destination rather than isolated states. Joint branding, coordinated marketing, shared infrastructure development, and integrated digital platforms would further enhance visibility and accessibility.

By pooling resources and working together, Northeast India can present itself as a unified tourism region, creating more compelling travel experiences and amplifying its appeal on both domestic and international stages.

Conclusion

From Vision to Transformation

Northeast India stands at the cusp of a tourism transformation. With breathtaking landscapes, rich cultural heritage, and strategic location, the region holds immense promise. Yet, this promise remains underutilized, constrained by fragmented planning, limited visibility, and persistent infrastructural gaps.



Through strategic branding, robust policy frameworks, and community-driven models, Northeast India can chart its own path.

By learning from the successes of Gujarat, Kerala, and Rajasthan, states that have redefined tourism in India through strategic branding, robust policy frameworks, and community-driven models, Northeast India can chart its own path. The aim is not to replicate these models, but to adapt their best practices, align them with the region's unique strengths, and elevate them to create a tourism narrative that is distinctly its own.

Bold reforms, collaborative leadership, and a unified branding strategy can unlock the region's full potential. Northeast India has the opportunity to become a model for sustainable, inclusive

tourism, one that respects local cultures, preserves fragile ecosystems, and delivers authentic experiences to travelers.

The time is ripe to turn vision into action. With the right intent, partnerships, and investments, Northeast India can evolve from an underexplored frontier into one of the most compelling tourism destinations in India, and a global example of how tourism can drive equitable, sustainable growth.

SOURCES: Ministry of Tourism, Government of India; Press Information Bureau; State Government Documents; Respective State Government Portals; Media Reports; Ministry of Statistics and Programme Implementation Website (MoSPI); HVS ANAROCK Research



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