



A VISION · INDIA'S INBOUND FRONTIER

The Argument for India

India has built a tourism economy at home. It has not yet claimed its place in the world's imagination. That frontier is the prize.



NIKHIL SHARMA

FOUNDER & CEO, ELEVATED INDIA

ELEVATED INDIA

LUXURY INBOUND · INDIA & NEPAL

ETNOW.IN BUSINESS CONCLAVE & AWARDS 2026

WEST EDITION · MUMBAI · 25 AUGUST 2026

I

The paradox, in numbers

India's travel and tourism economy reached \$263 billion in 2025 — the tenth-largest in the world.

\$263bn

TOURISM ECONOMY, 2025

46m

JOBS SUPPORTED

86%

OF IT DOMESTIC

And yet a single figure reframes everything. Roughly **86 percent** of that economy is **domestic**. The giant has been built almost entirely at home.

The world's share remains astonishingly small: some **ten million** foreign arrivals a year, worth around **\$28 billion** — roughly one traveller in every hundred and forty.

DAWN ON THE GANGES · VARANASI



II

The gap, and the prize

India ranks seventh in the world by arrivals — and **thirty-ninth** on the index that measures how ready a country is to receive them.

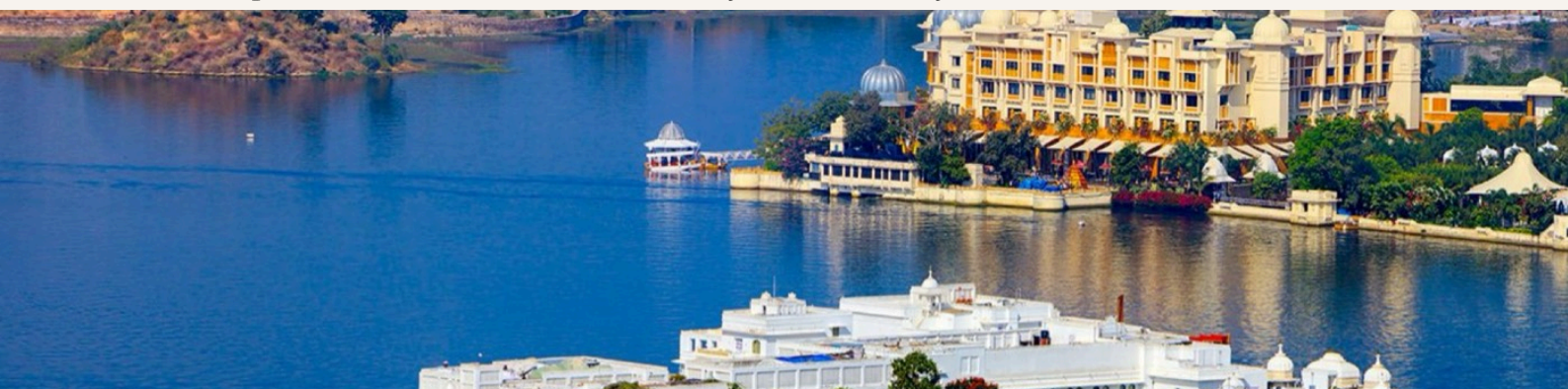
DESTINATION	INTL. ARRIVALS / YR
France	~100M
Spain	~85M
Thailand	~35M
Japan	~32M
Dubai (city)	~18M
India	~10M

International arrivals, latest available and rounded.

10M → 30M

MERELY MATCHING A SMALLER THAILAND

Closing that distance alone would **triple** foreign-exchange earnings, and spread them further than almost any other industry can.



III

The presentation gap, diagnosed

India does not have a substance problem. It has a presentation problem — and presentation is a discipline, not a destiny. The gap is five frictions, each of which can be named, measured and removed.

01 Access

Getting in — visas, arrival, the first hour.

02 Assurance

Feeling safe — especially for women and the solo traveller, the largest reservoir of hesitation about India.

03 Delivery

The last mile, where a promise is kept or broken by whoever was cheapest to hire.

04 Distribution

The map, where a country's wonder is crushed into a handful of icons.

05 Discoverability

The friction of the answer, where India is summarised to the traveller by a machine.



IV

Six moves that would close it

Offered not as demands but as one practitioner's argument — meant to be argued with, and improved upon.

01 Make arrival effortless

Access is not administration. It is invitation.

02 Make the woman traveller feel expected, not brave

A helpline that answers on the first ring, at three in the morning.

03 Professionalise the guide

A fragmented trade raised into a vocation.

04 Steward the icons before they are loved to death

Carrying capacity, honest timed entry, revenue ring-fenced.

05 Widen the map beyond the icons

The north-east, the Deccan, the Coromandel, the deep Himalaya.

06 Be present in the age of the answer

Digital presence is national infrastructure, as real as an airport.



A private house cannot legislate a nation's tourism. But it can build a benchmark the market moves toward.

THE HOUSE BEHIND THE ARGUMENT

ELEVATED INDIA

LUXURY INBOUND · INDIA & NEPAL

We design and operate **private journeys** for the world's most discerning travellers — rare access, cultural depth and uncompromising discretion. Every mile is run by our own people, and never handed off.

ACCREDITED

IATO member · Recognised Agency, Ministry of Tourism, Government of India

GROUND TRUTH

20+ years on Indian roads · Our own chauffeured fleet · Nothing subcontracted

HELLO@ELEVATEDINDIA.COM

+91 96548 17595 · ELEVATEDINDIA.COM

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