

HYDERABAD AS A HERITAGE TOURISM DESTINATION REVISITED: POLICY RENEWAL, CONSERVATION MILESTONES AND COMMUNITY-CURATED BRANDING OF A LIVING DECCAN CAPITAL, 2012–2026

A fourteen-year reassessment of tourism initiatives and the challenges of branding

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Abstract: This article revisits, fourteen years on, an assessment of Hyderabad’s prospects as a heritage tourism destination first presented at a national seminar at Pondicherry University in March 2012, in order to establish how the city’s heritage tourism product, policy environment, and destination brand have evolved between 2012 and 2026. The study employs a longitudinal, qualitative documentary case-study design that compares the 2012 baseline with evidence available in mid-2026, drawn from the Telangana Tourism Policy 2025–30, recent scholarship on state tourism policy, conservation agency reports, official statistics, journalism, and the digital output of community heritage collectives. Three findings stand out. First, the policy discontinuity that followed the state’s bifurcation in 2014, which left Telangana without a successor to the united Andhra Pradesh tourism policies of 2006 and 2010 under which the baseline was written, has formally closed: the Telangana Tourism Policy 2025–30, the state’s first dedicated tourism policy, designates twenty-seven Special Tourism Areas, two of which cover Hyderabad’s historic core, and creates a three-tier institutional mechanism with measurable investment, employment, and arrival targets. Second, the completion of the Qutb Shahi Heritage Park in July 2024 supplies the connected Qutb Shahi cultural landscape that the 2012 analysis recommended, and demonstrates that conservation-led product development is achievable through public–private partnership. Third, and least anticipated in 2012, interpretation of the city has been substantially taken up from below: journalist-historians, digital archives, and walking collectives now curate Hyderabad’s narrative through Instagram-mediated heritage walks, oral history, and heritage dining, effectively co-producing the destination brand. The article argues that Hyderabad’s branding challenge has shifted from an absence of narrative to the coordination of plural, sometimes dissonant, narratives, and proposes a framework of networked brand stewardship in which the state convenes rather than commands the storytellers of the living Deccan capital.

IndexTerms – community heritage collectives, Deccan, destination branding, heritage tourism, Hyderabad, Telangana Tourism Policy 2025–30

I. INTRODUCTION

Tourism remains one of the largest components of the world economy, and by 2024–25 international travel had broadly recovered to its pre-pandemic scale, with domestic travel continuing to supply the widest demand base in large economies such as India (UN Tourism, 2025). Within this economy, heritage tourism occupies a distinctive position: it can finance conservation, sustain guiding and hospitality employment, animate local enterprise, and strengthen urban identity, but it can equally intensify congestion, commodify culture, displace residents, and stress fragile fabric when it is poorly governed (Timothy & Boyd, 2003). Historic metropolises face these tensions most acutely because their attractions are embedded in living neighbourhoods, markets, religious practice, and contested urban development, so that destination competitiveness depends less on the count of monuments than on the coherence of the total experience produced jointly by agencies, businesses, residents, and visitors (Buhalis, 2000). Hyderabad exemplifies this class of destination. Founded in 1591 by Muhammad Quli Qutb Shah as a planned capital beyond the fortified settlement of Golconda, and shaped successively by the Qutb Shahi and Asaf Jahi dynasties, the city carries a distinctive Deccan identity expressed through architecture, Dakhni language and literature, cuisine, craft, festivals, and urban form (Luther, 2006; Vottery, 2010). It simultaneously carries a second, contemporary identity as a knowledge metropolis of information technology, pharmaceuticals, conventions, and education. An earlier study by the present authors, first presented at a national seminar at Pondicherry University in March 2012, evaluated Hyderabad’s heritage tourism proposition in the closing years of united Andhra Pradesh, when the Andhra Pradesh Tourism Policies of 2006 and 2010 framed promotion and the official heritage-walk programme was the city’s flagship interpretive product, and concluded that the city’s principal branding challenge

was not a shortage of attractions but the absence of a consistently coordinated narrative connecting the historic city with the modern metropolis, compounded by fragmented governance, weak interpretation, aggregate-only statistics, and conservation pressure on the historic urban landscape (Rupani & Uma Joseph, 2012).

Fourteen years later, the setting has changed in ways that invite systematic reassessment. The Government of Telangana notified the Telangana Tourism Policy 2025–30, the state's first dedicated tourism policy, which explicitly acknowledges that the state had lacked such a policy since 2014 and which sets quantified investment, employment, and arrival targets (Government of Telangana, 2025; Ramakrishna & Akther Ali, 2025). The Qutb Shahi necropolis, whose interpretation as a connected landscape the 2012 study recommended, was formally completed and inaugurated as the 106-acre Qutb Shahi Heritage Park in July 2024 after more than a decade of conservation by the Aga Khan Trust for Culture in partnership with the state (Aga Khan Development Network [AKDN], 2024). Meanwhile, the interpretive work once concentrated in a small official heritage-walk programme has diversified into a vibrant ecosystem of community collectives—the Hyderabad History Project, the Deccan Archive, the Hyderabad Walking Company, Sangāt, and allied initiatives—that curate the city's past through social media, walks, oral history, archives, and heritage dining (Homegrown, 2021; Lasania, 2025; The Deccan Archive, n.d.).

This article therefore asks a single overarching question with three subsidiary parts: how has Hyderabad's heritage tourism destination developed between 2012 and 2026 in terms of (a) policy and institutional architecture, (b) conservation and product development, and (c) the production and contestation of the destination narrative, and what do these developments imply for destination branding? The working hypothesis, derived from the 2012 baseline, is that the intervening years would show progress in policy and conservation while coordination of the brand narrative would remain the binding constraint. The study tests this hypothesis through a longitudinal documentary comparison and, in doing so, contributes an account of how digitally mediated community curation reshapes the theory and practice of heritage destination branding in Indian cities.

II. CONCEPTUAL FRAMEWORK AND LITERATURE REVIEW

Four bodies of theory frame the analysis. The first is destination branding. A destination cannot be managed like a packaged product because its identity emerges from a relational network of promotion, media, services, architecture, resident behaviour, and word of mouth that marketing organisations may guide but cannot command (Hankinson, 2004). Effective branding aligns stakeholder identity with audience image around a recognisable promise (Cai, 2002), and it must be integrated with product development and governance, since a slogan contradicted by sanitation, access, or monument condition erodes trust (Kavaratzis, 2004). Kavaratzis and Ashworth (2005) accordingly treat city branding as a matter of identity, policy, and communication rather than advertising, and insist on resident legitimacy: when local people recognise themselves in the narrative they become custodians and advocates rather than props.

The second body concerns the tourist-historic city and dissonant heritage. Ashworth and Tunbridge (2000) demonstrate that historic cities must balance legibility with plurality, conservation with contemporary use, and visitor needs with resident needs. Tunbridge and Ashworth (1996) extend this with the concept of dissonance: because heritage is a selective use of the past, every interpretation disinherits somebody, and destinations whose pasts include conquest, annexation, and social conflict must expect their narratives to be contested. Hyderabad's past—Kakatiya antecedents, Bahmani and Qutb Shahi sultanates, Mughal conquest, Asaf Jahi rule, the 1948 annexation and the Telangana armed struggle—offers precisely such contested terrain, and contemporary public debate over school curricula and commemoration confirms that the dissonance is active rather than latent (Lasania, 2022, 2026).

The third body is the historic urban landscape approach. UNESCO (2011) recommends that urban heritage be understood beyond individual monuments to encompass topography, setting, social and cultural practices, and economic processes. On this view the significance of Charminar depends on its surrounding streets, bazaars, and commercial life, and the value of Golconda and the Qutb Shahi tombs lies in their connected landscape of fortification, water systems, and necropolis. Conservation that isolates monuments cannot protect the visitor experience, and heritage impact must be weighed inside wider planning decisions, a point of renewed relevance as Hyderabad debates large riverfront redevelopment along the Musi (News Arena India, 2026).

The fourth body, which has grown markedly since the 2012 baseline, concerns experiential tourism, co-creation, and social-media-mediated destination image. Heritage becomes meaningful when visitors follow stories with knowledgeable interpreters, and guided walks are especially suited to dense historic districts because they convert scattered buildings into narrative and distribute attention and spending beyond flagship monuments (Rupani & Uma Joseph, 2012). Scholarship on user-generated content shows that tourists and residents now co-produce destination image through platforms such as Instagram, so that the effective brand is a negotiated outcome of official promotion and vernacular storytelling (Munar & Jacobsen, 2014). This study joins the two literatures by treating community heritage collectives as brand co-producers whose output is simultaneously interpretation, conservation advocacy, and marketing.

From these literatures the 2012 study derived five assessment criteria that are retained here for comparability: distinctive and defensible resources; coordination of a coherent identity among public and private actors; a brand promise supported by access, interpretation, and amenities; conservation that addresses the urban setting as well as monuments; and resident participation in the cultural and economic value created. The present article applies the same criteria to the 2026 evidence.

III. METHODOLOGY

The study uses a longitudinal, qualitative, documentary case-study design. The unit of analysis is the destination, defined as the Hyderabad urban agglomeration within its Telangana policy context, observed at two points: the March 2012 baseline and the situation available to the researchers in July 2026. The materials comprise five classes of documents. First, policy documents, principally the Telangana Tourism Policy 2025–30 issued by the Youth Advancement, Tourism and Culture Department (Government of Telangana, 2025), read alongside the Andhra Pradesh Tourism Policies of 2006 and 2010 that framed the baseline paper, and the Telangana Annual Plan 2015–16 as intervening evidence. Second, peer-reviewed and scholarly commentary on the policy, notably Ramakrishna and Akther Ali (2025). Third, conservation-agency documentation, principally releases of the Aga Khan Development Network on the Qutb Shahi Heritage Park (AKDN, 2024). Fourth, official statistics on tourist arrivals from the Directorate of Economics and Statistics (2015), the Ministry of Tourism, and compiled state series (CEIC, 2024; Telangana Today, 2024). Fifth, journalistic and community-produced sources documenting heritage interpretation, including the websites and published essays of the Hyderabad History Project, the Deccan Archive, and independent travel writing (Homegrown, 2021; Reddy, 2021; Lasania, 2022, 2025, 2026; Deccan Chronicle, 2026).

Analysis proceeded in three steps. The 2012 baseline findings were first restated as propositions under the five assessment criteria. Each proposition was then examined against the 2026 evidence, recording continuity, change, and reversal. Finally, the pattern of change was interpreted against the four theoretical literatures to derive implications for branding. Two temporal and epistemic boundaries were applied. Only material published on or before July 2026 was used, and administrative arrival counts were treated as indicators of recorded volume rather than measures of expenditure, satisfaction, or motivation, since reporting systems, classification practices, and aggregation vary across years and agencies. Because series definitions changed after state formation, statewide figures for 2022–23 are compared with the 2013–14 Hyderabad–Rangareddy figures only with explicit caveats, and no causal attribution from campaign to arrivals is attempted. The method is interpretive: its warrant lies in the transparency of sources and the consistency of criteria across the two observation points, not in statistical inference.

IV. RESULTS

4.1 Policy renewal: from budget lines to a dedicated tourism policy

The clearest institutional change since 2012 is the closure of the policy vacuum that opened with the state's bifurcation. The baseline paper was written under the framework of the united Andhra Pradesh Tourism Policies of 2006 and 2010, which sought a unique selling proposition and brand image for the state, offered land, subsidy, and market-development incentives, and committed explicitly to maximising the potential of Hyderabad city for new tourism products (Rupani & Uma Joseph, 2012). That framework lapsed with the formation of Telangana in June 2014, after which the new state operated without a dedicated tourism policy, relying on budgetary signals such as an Annual Plan allocation of Rs. 4,850.77 lakh for the Tourism Department in 2015–16, weighted towards new projects and project management (Government of Telangana, Planning Department, 2015). The Telangana Tourism Policy 2025–30 explicitly concedes this history, recording that the state had not had a dedicated tourism policy since 2014 and that the tourism ecosystem was not in tune with the available potential (Government of Telangana, 2025). The policy articulates a vision of positioning Telangana as India's most preferred destination and commits to five quantified outcomes over five years: attracting Rs. 15,000 crore of new tourism investment; creating additional employment for three lakh people; placing Telangana among the top five states for domestic and international arrivals; projecting the state's attractions globally through digital marketing, a strong social media presence, and literary documentation; and raising tourism's contribution to ten per cent or more of state GDP (Government of Telangana, 2025; Ramakrishna & Akther Ali, 2025).

Three features of the policy bear directly on Hyderabad's heritage product. First, the instrument of twenty-seven Special Tourism Areas (STAs), to be developed on mission mode through master planning, includes a Charminar Cluster (Charminar, Mecca Masjid, Laad Bazaar, Salar Jung Museum, Nizam Museum, and Chowmahalla Palace) and a Hyderabad–Rangareddy–Medchal Cluster (Golconda Fort, the Qutb Shahi Tombs, Taramati Baradari, the Buddha Purnima area, Keesaragutta, and urban lakes and forest parks), which for the first time treats the historic core as a designated planning object with its own strategy, project shelf, and implementation schedule (Government of Telangana, 2025). Second, the policy creates a three-tier institutional mechanism—a State Tourism Promotion Board chaired by the Chief Minister for iconic and mega projects, an Empowered Committee chaired by the Tourism Minister for large and medium projects, and Destination Management Organisations headed by District Collectors at each STA, monitored by a Project Management Unit under the state tourism corporation—thereby addressing, at least on paper, the coordination deficit that the 2012 study identified as the central governance bottleneck (Government of Telangana, 2025). Third, the policy embeds branding and experience commitments that echo the earlier diagnosis: safe-tourism measures including tourist police and a Tourism Friendly Index; corporate adoption of monuments for conservation; a dedicated fairs-and-festivals unit for Bathukamma, Bonalu, and allied festivals; skill development through an upgraded tourism and hospitality university; and incentives graded by investment size and location (Government of Telangana, 2025; Ramakrishna & Akther Ali, 2025).

Table 1 summarises the policy elements most relevant to the heritage city. The scholarly assessment available so far is broadly favourable but procedural: Ramakrishna and Akther Ali (2025) conclude that the policy seeks to create investment-ready ecosystems aligned with the Sustainable Development Goals and environmental, social, and governance principles, while noting

that outcomes will depend on periodic review and implementation. No independent evaluation of delivery against the five outcome targets was available by mid-2026, which is unsurprising given the policy's recency, but which also means the present study can assess design rather than performance.

Table 1: Provisions of the Telangana Tourism Policy 2025–30 most relevant to heritage tourism in Hyderabad

Policy element	Provision
Vision and outcomes	Position Telangana as India's most preferred destination; Rs. 15,000 crore investment, three lakh additional jobs, top-five ranking in arrivals, global digital projection, and tourism at ten per cent or more of state GDP within five years.
Special Tourism Areas	Twenty-seven STAs developed on mission mode with master plans; the Charminar Cluster and the Hyderabad–Rangareddy–Medchal Cluster cover the historic core, Golconda–Qutb Shahi landscape, and urban lakes.
Institutional mechanism	State Tourism Promotion Board (Chief Minister) for iconic and mega projects; Empowered Committee (Tourism Minister) for large, medium, and small projects; Destination Management Organisations under District Collectors at each STA with a Project Management Unit for monitoring.
Heritage and experience measures	Corporate adoption of monuments; safe-tourism measures including tourist police, women-friendly provisions, and a Tourism Friendly Index; heritage, spiritual, MICE, eco, medical and wellness, and sports tourism frameworks; fairs-and-festivals unit; heli-tourism and river tourism initiatives.
Incentives	Capital investment subsidy, partial SGST reimbursement, industrial power tariffs and property-tax provisions, reimbursement of land conversion and registration charges, special incentives for sustainable projects, and PPP models from build–operate–transfer to equity.

Source: compiled by the authors from Government of Telangana (2025) and Ramakrishna and Akther Ali (2025).

4.2 Conservation and product development: the Qutb Shahi Heritage Park and the Charminar precinct

The 2012 study argued that Golconda Fort and the Qutb Shahi tombs should be interpreted as a connected cultural landscape rather than separate stops. That recommendation has, in substance, been delivered. After more than a decade of conservation begun in 2013 by the Aga Khan Trust for Culture with the state's heritage department and philanthropic partners, the 106-acre Qutb Shahi Heritage Park was completed and inaugurated on 28 July 2024, integrating some forty mausoleums, twenty-three funerary mosques, six stepwells, a hammam, pavilions, and garden structures into a single landscaped archaeological park at the foot of Golconda (AKDN, 2024). The programme revived traditional lime and stucco craft, generated several lakh person-days of skilled work, earned an Award of Distinction at the UNESCO Asia-Pacific Awards for Cultural Heritage Conservation for its stepwell conservation in 2022, and is intended to anchor a Qutb Shahi trail linking the park to the fort (AKDN, 2024; Tata Trusts, n.d.). Independent visitors and community walk leaders reported the transformation well before completion, describing restored monuments, recovered stucco and tilework, and renewed public use of the necropolis and the Naya Qila extension of the fort (Reddy, 2021). The site sits on India's tentative list for World Heritage nomination among Deccan Sultanate monuments, and heritage professionals publicly urged the state in 2025 to press the nomination of the tombs, Charminar, and Golconda, indicating both the site's standing and the unresolved politics of nomination (Siasat, 2025).

The Charminar precinct presents a more equivocal record that illustrates the persistence of the urban-management problems catalogued in 2012. The long-running Charminar Pedestrianisation Project, conceived in the late 1990s, was eventually scrapped after repeated missed deadlines and replaced by a Charminar Historical Precinct Revitalisation Plan (Think City, n.d.). By mid-2026 the Archaeological Survey of India had prepared a fresh detailed project report proposing a hawker-free zone between Gulzar Houz and the monument during visiting hours, basic amenities such as drinking water, washrooms, seating, and signage, and a monitoring committee against unauthorised construction, while the Quli Qutb Shah Urban Development Authority pursued façade harmonisation in Laad Bazaar and Pathergatti and precinct illumination (Deccan Chronicle, 2026). These are precisely the interpretation and public-realm deficits identified fourteen years earlier, now being addressed incrementally rather than through a single transformative scheme. At metropolitan scale, the proposed Musi riverfront redevelopment promises a tourism circuit connecting Charminar, Taramati Baradari, and riverine heritage, but has attracted substantial criticism over displacement, cost, and the absence of a maintenance model, underscoring that heritage-led regeneration in Hyderabad remains socially contested (News Arena India, 2026).

4.3 Community-curated interpretation: heritage walks, digital archives, and heritage dining

The most significant development that the 2012 study did not foresee is the scale and sophistication of community-led interpretation. The baseline documented a single official heritage-walk programme, begun in 2009 on routes designed by the conservation architect Madhu Vottery, which had drawn some three thousand participants by October 2011 and offered four routes on weekend mornings at a nominal charge (Rupani & Uma Joseph, 2012; Menon, 2016). By 2026 that model has been joined—and in visibility, arguably surpassed—by a plural ecosystem of independent initiatives whose common infrastructure is the smartphone and the Instagram account. The Hyderabad History Project, founded on 24 February 2017 by journalist Yunus

Lasania, combines audio-visual documentation of monuments with oral histories of older residents and weekly curated walks at the Qutb Shahi tombs, Golconda, Chowmahalla Palace, the Paigah tombs, the British Residency, and Secunderabad, extending to day expeditions to Bidar to situate Hyderabad within the wider Deccan (Homegrown, 2021; Hyderabad History Project, n.d.). The Deccan Archive, a collective founded by Mohammed Sibghatullah Khan, conducts researched walks in collaboration with INTACH in deliberately overlooked neighbourhoods—Nampally, Shahgunj, Bansilapet, Begumpet—alongside Urdu and Dakhni workshops, digitisation of manuscripts and photographs, and published compendia of demolished and endangered buildings (The Deccan Archive, n.d.; LBB, 2025). The Hyderabad Walking Company offers structured commercial tours of the walled city, Golconda, and the twin seats of Nizam and Resident, while institutional actors such as the Deccan Heritage Academy stage commemorative walks with the Archaeological Survey of India and the state tourism corporation on occasions such as World Heritage Day (Hyderabad Walking Company, n.d.; Hyderabad Mail, 2025). Newer cultural collectives such as Sangāt use the same platforms to convene Deccani music, poetry, and conversation, extending curation from the built to the performed inheritance (Sangāt, n.d.).

Two extensions of this ecosystem deserve emphasis. The first is culinary. In 2025 the Hyderabad History Project launched Pazirai, a heritage dining initiative that stages curated mehfil-style dinners in historic homes, reviving the etiquette of mehman nawazi and pairing family recipes with storytelling; its founders explicitly frame the venture as heritage preservation through hospitality rather than restaurant business (Lasania, 2025). Given that the 2012 study identified cuisine as the city’s most immediate point of visitor contact, Pazirai represents the productisation of intangible heritage by community actors rather than by the state. The second extension is narrative correction. The same journalist-historians who guide walks also intervene in public debate—arguing, for instance, that school curricula overemphasise the Mughal court at the expense of the Bahmani–Qutb Shahi story of the city’s own founding, and that commemoration of the 1948 annexation should acknowledge the Telangana armed struggle and the complexity of the period rather than a single liberation narrative (Lasania, 2022, 2026). Reader responses contesting these very interventions, including claims for Kakatiya primacy in the region’s story, demonstrate that Hyderabad’s heritage is actively dissonant in Tunbridge and Ashworth’s (1996) sense, and that the walk leaders now function as visible participants in the negotiation of the city’s identity. Table 2 summarises the principal community initiatives.

Table 2: Principal community-led heritage interpretation initiatives in Hyderabad, 2017–2026

Initiative	Form	Principal activities
Hyderabad History Project (2017)	Journalist-led project and walks	Audio-visual documentation, oral history, weekly curated walks (Qutb Shahi tombs, Golconda, palaces, Secunderabad, Bidar day trips), essays, merchandise, and Pazirai heritage dining (2025).
The Deccan Archive	Volunteer collective and studio	Researched walks in overlooked neighbourhoods with INTACH, Urdu and Dakhni workshops, digitisation of manuscripts and photographs, publications on demolished and endangered buildings.
Hyderabad Walking Company	Commercial guided tours	Structured tours of the walled city, Golconda, and the Nizam–Residency axis oriented to visitors and business travellers.
Deccan Heritage Academy and allied bodies	Institutional trust	Commemorative public walks with the Archaeological Survey of India and the state tourism corporation, heritage advocacy.
Sangāt and cultural collectives	Platform-based collective	Curated gatherings around Deccani music, poetry, and conversation, extending interpretation to intangible and performed heritage.

Source: compiled by the authors from Homegrown (2021), Reddy (2021), Lasania (2025), The Deccan Archive (n.d.), Hyderabad Walking Company (n.d.), Hyderabad Mail (2025), and Sangāt (n.d.).

4.4 Visitor volumes: growth, recovery, and a persistently modest international share

Comparable statistics remain the weakest layer of evidence, exactly as in 2012, when the baseline could cite only programme-level counts such as the roughly three thousand participants recorded on the official heritage walks by October 2011 (Rupani & Uma Joseph, 2012). The earliest comparable city-level series, treated here as the near-baseline, recorded 8,432,322 domestic and 150,745 foreign arrivals for the combined Hyderabad–Rangareddy centre in 2013, and 9,297,426 domestic and 70,051 foreign arrivals in 2014, drawn from the Statistical Year Book 2015 (Directorate of Economics and Statistics, 2015). Post-bifurcation series are published at state rather than city level and with changed definitions, so direct comparison is not possible. Compiled state series indicate roughly 60.7 million recorded domestic visits in Telangana in 2022 and about 58.4 million in 2023, while departmental figures cited in the press show foreign visitor counts recovering from 5,917 in 2021–22 to 68,401 in 2022–23 as pandemic restrictions lifted (CEIC, 2024; ETV Bharat, 2024). Ministry of Tourism port-of-entry data nevertheless show Hyderabad’s share of India’s foreign tourist arrivals remaining modest—around six per cent in late 2023, far behind Delhi and Mumbai—confirming that the city’s international heritage market remains underdeveloped relative to its resources (Telangana Today, 2024). Table 3 assembles these indicators with their caveats.

Table 3: Recorded visitor indicators for Hyderabad and Telangana, 2013–2023

Indicator	Value	Coverage and source
Domestic arrivals, 2013	8,432,322	Hyderabad–Rangareddy combined centre; Directorate of Economics and Statistics (2015).
Domestic arrivals, 2014	9,297,426	Hyderabad–Rangareddy combined centre; Directorate of Economics and Statistics (2015).
Foreign arrivals, 2013 / 2014	150,745 / 70,051	Hyderabad–Rangareddy combined centre; Directorate of Economics and Statistics (2015).
Domestic visits, 2022 / 2023	≈60.7 m / ≈58.4 m	Telangana statewide recorded visits; compiled series (CEIC, 2024).
Foreign visitors, 2021–22 / 2022–23	5,917 / 68,401	Telangana statewide, departmental figures reported in the press (ETV Bharat, 2024).
Hyderabad share of India's foreign tourist arrivals, December 2023	≈6.2 per cent	Ministry of Tourism port data reported in Telangana Today (2024).

Note. Figures are administrative counts under differing definitions and coverage; pre- and post-bifurcation series are not directly comparable and are presented as orders of magnitude only.

V. DISCUSSION

Read against the five criteria carried over from the baseline, the fourteen years show asymmetric progress. On the first criterion, distinctive and defensible resources, Hyderabad's position has strengthened: the completed Qutb Shahi Heritage Park adds a conserved, legible, internationally recognised anchor to the Charminar–Golconda axis, the city's 2019 UNESCO Creative City designation in gastronomy formalises the culinary claim, and the state's only inscribed World Heritage property, the Ramappa temple, extends the heritage hinterland for which Hyderabad is the gateway (AKDN, 2024; Ramakrishna & Akther Ali, 2025). On the fourth criterion, conservation of the urban setting, the record is split: exemplary landscape-scale conservation at the necropolis coexists with incremental, repeatedly reorganised management of the Charminar precinct and with a riverfront programme whose social costs are contested, so the historic urban landscape approach is honoured at one site and strained at others (Deccan Chronicle, 2026; News Arena India, 2026).

On the second criterion, coordinated identity, the formal architecture has improved markedly—an STA covering the historic core, a promotion board, an empowered committee, and destination management organisations—but design is not yet delivery, and the deeper finding of this study is that coordination now has more parties to coordinate. In 2012 the branding problem was framed as the state's failure to connect the heritage city with the knowledge metropolis. In 2026 the destination narrative is being produced daily by community collectives whose interpretive authority rests on research, residence, and audience trust rather than on official mandate. This is, in Hankinson's (2004) terms, the relational network brand made flesh: the storytellers are organised, followed, and economically active, staging walks, dinners, publications, and debates. Their work satisfies the third criterion—interpretation supporting the brand promise—better than any official signage programme yet has, and it substantially advances the fifth criterion of resident participation, since the walks recruit residents as audiences, hosts, and future custodians. At the same time, it changes the state's task from message control to what may be called networked brand stewardship: convening the collectives, underwriting the public realm and amenities their itineraries depend upon, opening data and archives to them, and absorbing rather than suppressing the dissonance they surface.

Dissonance is the second theoretical lesson of the period under review. The debates over annexation commemoration and over Mughal-centric curricula show that Hyderabad's past cannot be marketed as a single romantic story without disinheriting someone, whether the heirs of the armed struggle, the champions of Kakatiya antiquity, or the custodians of Qutb Shahi and Asaf Jahi memory (Tunbridge & Ashworth, 1996; Lasania, 2022, 2026). A brand platform of the living Deccan capital, as proposed in 2012, remains serviceable precisely because it is plural: it can hold Kakatiya tanks, Bahmani crossroads, Qutb Shahi urbanism, Nizami institutions, the trauma and politics of 1948, and the contemporary knowledge economy within one continuing story of reinvention. The policy's own commitment to literary documentation and a strong social media presence (Government of Telangana, 2025) is best read as an invitation to formalise partnership with the actors who already perform this documentation. The third lesson concerns measurement. The persistence of aggregate, definitionally unstable arrival counts—and the impossibility of comparing 2013–14 city figures with 2022–23 state figures except as orders of magnitude—means that the policy's outcome targets cannot currently be verified at destination level. The 2012 recommendation of site-level visitation, expenditure, satisfaction, and length-of-stay measurement therefore stands, now reinforced: the new destination management organisations give the state, for the first time, an institutional home for such measurement, and the community collectives provide a low-cost sensing network whose booking and engagement data could, with consent, illuminate demand for interpretation. Hyderabad's modest share of national foreign arrivals despite superior air connectivity suggests that the binding constraint on the international market is neither access nor product but packaged, trustworthy, bookable experience—exactly the gap the walking ecosystem has begun to fill at boutique scale (Telangana Today, 2024).

Several limitations qualify these conclusions. The design is documentary and interpretive; no primary fieldwork with visitors, residents, officials, or collective founders was undertaken, and the account of community initiatives relies on their own publications and journalistic coverage, which may overstate reach. Policy assessment concerns design rather than implementation because the 2025–30 policy is recent. Statistical comparison is constrained by changed series. Future research should triangulate through interviews with walk leaders and destination managers, participant observation of walks and heritage dinners, netnographic analysis of the collectives' Instagram audiences, and, once available, evaluation of STA master plans and outcome indicators.

VI. CONCLUSION

This article set out to establish how Hyderabad's heritage tourism destination developed between 2012 and 2026 across policy, conservation, and narrative, and what the intervening fourteen years imply for branding. The evidence shows a destination transformed in two respects and stubborn in a third. The policy vacuum has been filled by the Telangana Tourism Policy 2025–30, which designates the historic core as Special Tourism Areas, quantifies ambitions, and builds a three-tier delivery mechanism; and the conservation agenda has produced a landmark in the completed Qutb Shahi Heritage Park, vindicating the 2012 call to interpret the Qutb Shahi landscape as a whole. The stubborn element is the everyday urban management of the Charminar precinct and the equitable governance of large regeneration schemes, where announced plans continue to outrun delivered public realm.

The study's principal contribution, however, lies in documenting the rise of community-curated interpretation—walks, digital archives, oral history, heritage dining, and public argument—as the effective engine of Hyderabad's destination narrative, and in drawing the theoretical consequence: destination branding in a dissonant, digitally mediated heritage city is no longer a communication task the state performs upon audiences, but a stewardship task the state performs among co-producing storytellers. If the new institutional mechanism convenes these actors, invests in the precincts their itineraries traverse, measures value rather than volume, and lets the city's plural pasts argue productively within one narrative of a living Deccan capital, Hyderabad can convert fourteen years of foundations into the coordinated, credible, and inclusive heritage destination that its four centuries of urban life deserve. In that event, the branding challenge diagnosed in 2012 will have been answered not by a slogan but by a settlement among the city's many custodians.

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