India Tourism CONCLAVE

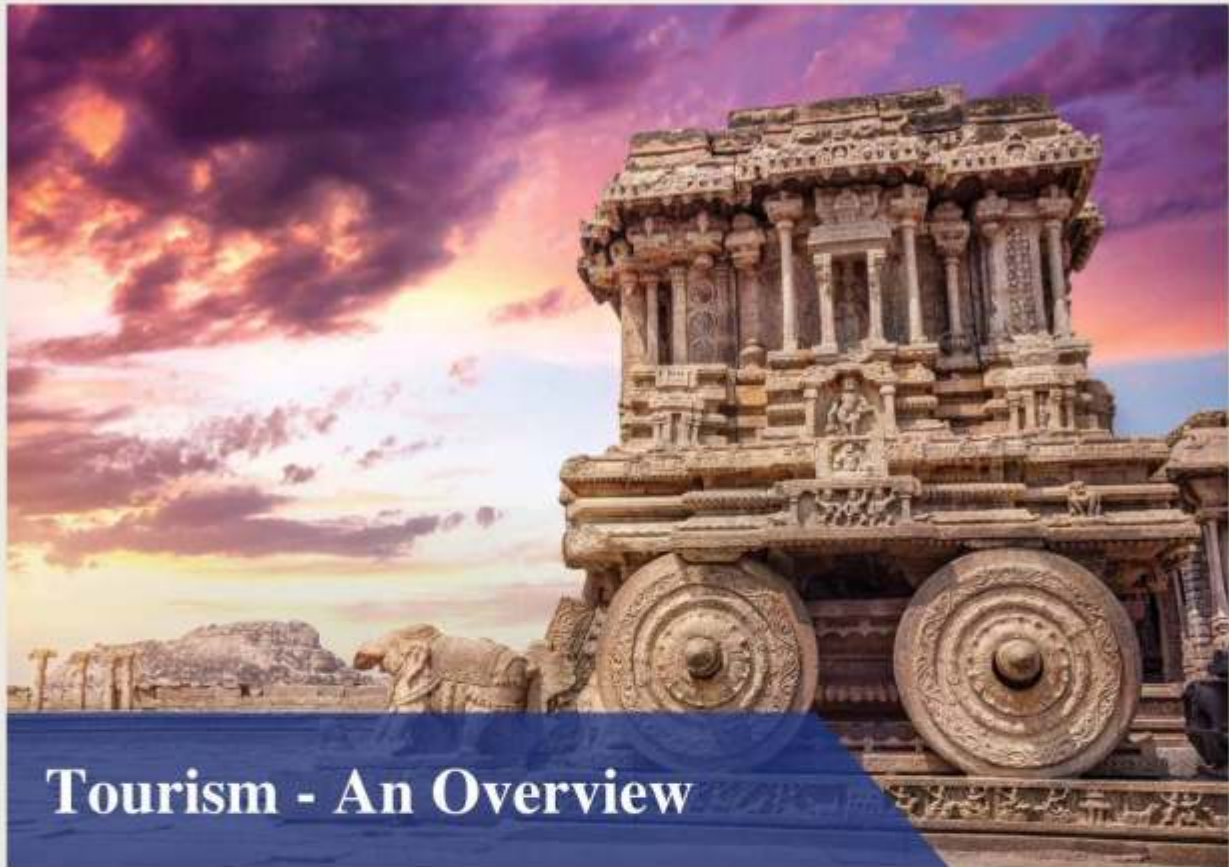Chandigarh | January 15, 2021

REPORT

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Tourism - An Overview

India, with its 5000 year old historical legacy and heritage, second largest population and third largest GDP (PPP), never fails to enthrall and enchant. It is a country, prominent for its pervasive diversity in culture, architecture, art and music, literature, food, fauna and flora and picturesque landscapes. A Multilingual Country with a common language of love and warm heartedness captures the interest of many, both globally and locally making it an attractive tourism destination.

The COVID 19 pandemic has significantly altered the dynamics of life, of preferences, of how business is done, across the globe. A concomitant of this pandemic, Physical and Financial constraints further led to back breaking socio- economic ramifications for all sectors. Tourism was one of the worst hit sectors during this lockdown and came to an absolute standstill causing colossal loss of both employment and revenue. But the advent of this pandemic has provided us with an opportunity to globally reset, to rethink, recalibrate and reshape the existing fundamental mechanisms of how provisioning of goods and services in this sector is done. Also in the bounds of this pandemic, we have come to realize the pivotal role digitalization plays, to facilitate all processes, in all sectors.

After easing of the lockdown guidelines there has been a release of the pent up demand but people's desire to travel still faces headwinds.

Apart from achieving and expanding the pre COVID numbers, tourism in India also grapples with some other constraints. One of the other big challenges faced by this sector is the dearth of trained human resource and absence of a facilitative infrastructure to fully utilize the economic potential of this sector.

In FY20, 39 million jobs were created in the tourism sector in India; this accounted for 8.0% of the total employment in the country. In 2020, contribution of travel and tourism as percentage of GDP for India was 9.3 %. Over a period of time, the focus of the government has been on streamlining the tourism policy through marketing and rebranding initiatives and a variety schemes such as Atithi Devo Bhava , Swadesh Darshan, UDAN, PRASAD ,Incredible India Campaign and many more. COVID 19 has jolted the progress and much is still unknown of the pace of tourism's recovery but what is lucid and compelling is that tourism is one of the top sectors that can be leveraged to achieve the 5 trillion dollar economy dream by capitalizing our domestic strength and numbers, to overcome this predicament .

Inaugural Session

Sh. Prahlad Singh Patel
MoS (Independent Charge)
Ministry of Culture & Tourism, GoI

The conclave began with Hon'ble Sh. Prahlad Singh Patel Ji's inaugural address in which he highlighted the importance tourism holds not just for bringing together people and cultures but also for the economy of our country. Commending the current government for their incessant efforts to change the perception and improve our ranking on the Travel and Tourism Competitiveness Index from 65th in 2014 to 35th in 2019 ,he pointed towards leveraging the unutilized , tremendous potential of our culture, heritage and the inherent welcoming nature of Indians ,to attract both international and domestic tourists. He acknowledged that the pandemic has jarred employment and growth in the tourism sector but has also presented to us with an opportunity to prioritize

wellness tourism facilities,Yoga,Ayush,Ayurveda etc. fully utilizing our soft power to recover from these losses. According to recent MoT figures, big states and cities are in losses but small destinations and hotels have started to recover and achieve their pre COVID numbers. He emphasized that,we in India are blessed with a rich biodiversity and culture but preconceived perception and the inability to provision coordinated services is a huge challenge. He also listed certain other initiatives to facilitate growth of this sector,which are as listed below:

1. ASI and State Archeology to incorporate all information on Indian monuments, history and timelines on a single portal so that everyone around the world can have access to this list

2. Updating of the tourism ministry portal to make a tourism highway by listing all hotels and public facilities on a particular route. The idea is to promote these destinations on this portal, irrespective of their ownership, private, or govt. or semi government and to provide 100 percent accurate information.

3. In another agreement Google will blink indicate monuments within 20 meter radius of an individual, expected to increase the footfall.

4. To solve the paucity of guides, the Government has started the tourist facilitator course with nodal institute as , IITTM GWALIOR and currently has 5250 enrollments in the first batch. The aim of this programme is to initiate batches and train and pass students every 2.5 months

5. To curb shortage and inefficiency of data, Ministry of Tourism, launched NIDHI (National Integrated Database of Hospitality Industry) portal appealing everyone to self declare themselves so that they can leverage the tourism ecosystem efficiently. Earlier, only 1400 hotels were registered,today the ministry has a data bank of 34000 hotels registered on NIDHI Portal. Another portal SAATHI is issuing

Sh. Satish Kumar
Rashtriya Seh Sangathak
Swadeshi Jagran Manch

Sh. Sanjay Tondon
National Executive Member,BJP
Seh Prabhari,HP

certificates to hotels on self declaring that they follow the SOPs of home ministry/ health ministry/tourism ministry; so that the tourist can be assured that the respective hotel is safe.

Further Sh. Satish Kumar, Rashtriya Seh Sangathak, Swadeshi Jagran Manch emphasized that India is a young nation with 37 crore people in line for employment and tourism is a fertile sector to cater to this segment. He pointed towards how between 2014-2019, India witnessed the strongest growth in the number of jobs created (6.36 million),followed by China (5.47 million) and the Philippines (2.53 million) (WTTC's Economic Impact 2019 report). He also added how Statue of Unity in Gujarat has been able to add not just to the state exchequer but also to uplift the livelihood of travel/bus/taxi/hotel operators and tribals
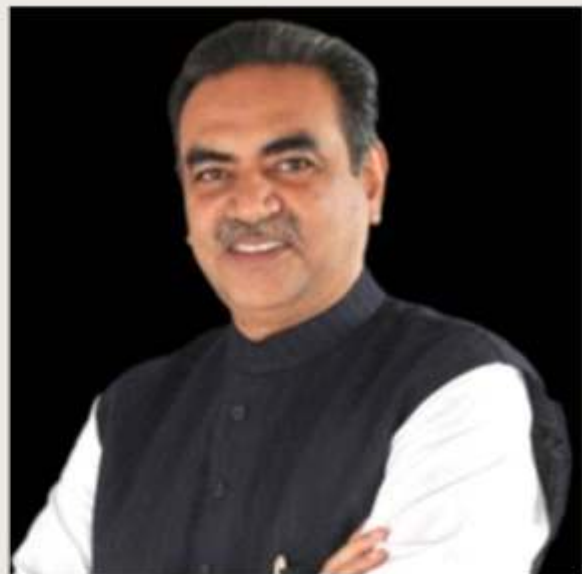
through positive trickle downs and how Vaishno Devi in Jammu contributes to the state economy. He said that the focus should be on making the lesser known and unknown spots known, through strong marketing and highlighted India's potential for medical tourism as a cost effective alternative for various health procedures and surgeries. He reiterated that we need to recognize the potential India has and then develop a vision to execute it.

Sh. Sanjay Tondon, National Executive Member, BJP, Seh Prabhari, HP, gave the concluding address for the inaugural session and urged the people to look Inwards for travelling needs,to know and understand their own country better. He also highlighted that Ayodhya's Ram Temple will be a very lucrative opportunity for us to create both employment and tourism.

Sh. Ashish Kumar
Co Chairman, FICCI
Travel Technology Committee

Sh. Sandeep Dayal
Sr. Consultant & Advisor
Ebix Inc. (Mercury Travels)

Session - 1 | New Trends in Travel & Tourism

The insights of the key speakers for this session were strung around the changing tourism preferences and trends across the consumer pipeline especially in the Post COVID scenario. Many defined it as the great reset and most panelists were relatively optimistic of the opportunities this great reset has created to redefine, re-engineer, rescale and regroup the tourism landscape of our country. It has also brought together all stakeholders/ supplier pipeline i.e. the tour/travel companies, OTAs, hotels, the government etc. to coordinate their efforts for stimulating domestic travel through thought leadership and progressive and innovative policies, inputs and entrepreneurship.

Speakers with their first hand knowledge gained from directly and closely working in the sector claimed that they were now starting to see the same number of bookings as pre COVID but there were also certain customer behavior changes that were observed. During the pandemic due to unavailability of alternatives other than flights, the Middle class discovered that flying too was actually an accessible, convenient and affordable option and now they're sticking to it. Business class air searches were also up by 29% and charted planes got a significant boost too with people spending more on luxury, social distancing, safety, privacy and space. 10% of the people in India who can afford charter are currently

chartering so the speaker indicated a huge space for charter flight sector to grow over a period of time because charters map and touch onto destinations which are not even serviced by normal demand-supply pipeline. In the long run our focus should also be on making chartering affordable.

Post Pandemic people have found peace in solitude and therefore huge spike in demand for lesser known places and offbeat destinations like Shivamogga is seen. Analytics indicate that the average length of stay has increased by 34% and staycations and workations are in vogue. A trend of living by the moment has lead to a surge in last minute bookings which has caused the average last minute booking prices to shoot up.

The speakers focused on how India was coming of age and shares a zest for traveling and connecting. They are travelling with much more ease and affordability. Backpacking with full gusto, they see it as a means to not just quench their wanderlust but as a means to nourish their parched souls through soul seeking, shared experiences and interactions, community living, cultural affinity and much more. Currently to facilitate affordable lodging, there are 500-1000 backpacker hostels across India. Setting up enabling infrastructure close to forests,hills,desserts,building good highways etc. is making these destinations accessible. The speakers reiterated that in 21st century we really have a lot to offer to the world in terms of our diversity,exotic flavors,cultures,cuisines and for hosting the whole world. Currently, mostly

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Co Founder and CEO,Forsee Aviation
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Sh. Vishal Jolly
Former State President,BJP
Andaman and Nicobar Islands

marketing and perception is an issue but it presents India with a great opportunity to build a youngster brand in the whole tourism ecosystem.

Another speaker pointed towards developing a unique selling point for tourism destinations to attract more inbound and outbound tourists. For example, they highlighted that The Andaman and Nicobar Islands offer a galore of tourism opportunities that cater to people/ tourists with varied interests by offering one of its kind water sports like sea kart, self drive water sport activities, which exists only in three places in the world Mauritius, Dubai and Andaman. Apart for these, scuba diving in Port Blair brings tourists close to all the alluring marine life of the islands. Speakers mentioned that human and social overhead capital are the cornerstones for making this sector conducive and for catering to both inbound and outbound tourism.

The year 2020 made us realize that we are living in perpetual uncertainty and it was definitely a tailspin for the entire industry, be it hotels, airlines, travel & tour companies, sectors of the outbound and inbound, tourist spots/ attractions. One of the speaker mentioned that crisis is a way for innovation and launches a generation of entrepreneurs, enterprise and digitization and also helps in generating & exploring markets unknown. This catastrophic situation has forced companies to rethink, refigure, screen the environment and reformulate strategies which will be in favor of tourism suppliers, service providers, customers, society and the country.

Sh. Dharamveer Singh Chouhan
Co Founder and CEO
Zostel

Sh. Prashant Pitti
Co Founder, Director
easemytrip.com

Sh. Sunil Kumar Sharma
Former Cabinet Minister, Power
Government of Jammu and Kashmir

Sh. Vipul Jain
Founder and CEO
Gabbit Systems

Session - 2 | Religious Travel & Tourism

During this session, trends, challenges, growth prospects of Religious Tourism were discussed. Speakers defined religious tourism as faith motivated travel. It is the desire to experience the pristine, authentic practices of one's faith while exploring the history, rituals, culture, cuisine, wellness practices, art and architecture influenced by it. The interesting fact is that 60 % of domestic travel caters to religious tourism i.e. it is directly or indirectly linked to pilgrimage and religious tourism.

COVID has led to structural and transformational changes in the way of living by making people more concerned about health and safety. Sudden lockdown, mobility bans, stay at home campaigns etc affected the tourism sector badly. Religious places were considered as the hotspots for COVID-19 which forced the closing down of these holy places and restrictions in movements of all the pilgrimages, giving them the only privilege of staying at their homes. As a result, lots of temples in India have suffered major setbacks in their footfall and their revenue due to cancellation of hotel bookings and room nights at pilgrimage sites.

One of the speaker mentioned that people's strong belief, spiritual attachment to the deity/destination and enthusiasm bring back the jinks in religious tourism sector, after permitting the reopening of these religious places in Unlock-4 Guidelines. Indians are risk takers and this factor has favored the tourism industry. The Indian art, culture, traditions and

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APAC, Capegemini

Smt. Aditi Balbir
Founder and CEO
V Resorts

architecture propel and enthrall people not domestically but globally too, to explore the ancient glory of our country. The sagas behind each and every historical place and the chain of whole event correlated to the history of these places is fascinating the youth to assimilate our culture, heritage, ancient places, and spirituality and is sowing the seeds of belief and zest in youth which provide impetus to religious tourism in India. Taking this as a weapon, various entrepreneurs are designing strategies and a roadmap, to stimulate travelling in this sector.

During the deliberation speakers highlighted the correlation between Religious and Adventure Tourism. They mentioned that various places in India offer the benefits of religious and adventure tourism concurrently. Religious places like Vaishno Devi Amarnath in Jammu & Kashmir ; Badrinath in Uttarakhand;

Char Dhams etc. offers opportunities and scope for soft and hard adventure tourism based on the experiences, unique environment, history, compelling stories, diverse flora and fauna, variant culture etc. Climbing and trekking to these sites makes them ideal for hard adventure tourism and visiting historical/heritages sites makes them ideal for soft adventure tourism. Promoting the new idea of taking forward religious and adventure tourism in conjunction will influence the Indian Tourism Industry positively.

Moving further, speaker drew attention to the opportunities created for the domestic tourism and how pandemic has bought the beautiful and unique places of our country into the limelight. Due the halt in outbound tourism because of the restrictions in movement, domestic audiences become more aware about the opportunities available to explore the

exclusive places in our country than visiting international places. This pandemic has transformed the entire world, creating a new normal for domestic and international travel and at this point it becomes very crucial that we keep India connected to tourists' faith. The ancient iconic religious sites have the potential of booming markets for both international and domestic tourism. Digitalization is the important tool that helps the devotees to connect to their faith and religious destinations through virtual devotional experience. Online facilities of charity/donations system, virtual platforms for Darshan, online Prasad delivery, connect the Diaspora across the world to their culture, religion and belief.

COVID 19 has changed life patterns around the world, specifically the travel aspects and now the domestic tourism plays a vital role in our society. New trend of "Work from Home" and Internet accessibility facilitate Staycation and make the travelling easy as compared to earlier situation where people compelled to postpone their plans due to remote working situations. In addition to this, speakers evinced positively towards the changing travel and tourism scenario post COVID. According to their interpretation, pandemic has concentrated the interest of people to their home country and directed them to discover and travel to offbeat, untouched, unexplored destinations.

Unfortunately, not only pandemic has impeded the travel and tour but various other factors are also responsible for its downfall. The religious places in India experience short term but intense population pressure during the peak season, resulting in overcrowding, long queues with improper management system, unhygienic environment, traffic jams etc. Some places lack basic facilities such as air, road connectivity and hospitality services as compared to similar places abroad which have strong infrastructure base, appropriate management system, good connectivity and suitable facilities. Speakers also conveyed their concern towards tourists' safety which has a huge impact on the experience the customer gains from their journey. It is necessary for the tourism players to ensure a smooth and safe journey for the tourists. Apart from this, there should be a provision and standard structure for data collection, storage and management, strategic policies to manage the bursting population and suitable medium to transmit information at right time to the right place so that any uncertain event can be controlled.

Smt. Sagnika Chowdhury
Co-Founder, Head of Growth
Dev Dharshan

Valedictory Session

Sh. Jai Ram Thakur
Chief Minister
Himachal Pradesh

The Valedictory session began with emphasis on the need to identifying the challenges and potential in Tourism Industry. Dr. Subhash Sharma, Director, CEPR, said that in the post-Covid times the industry would bounce back with double the energy. He accentuated on the need to synergize efforts of stakeholders in tourism industry and the policies for better coordination and implementation. Further, he summarized the various problems and suggestions related to Tourism Sector. He also applauded the initiatives of the current government for making India a biggest Tourism Hub.

The phase of pandemic has demolished the world's tourism and travelling sector. Tourism can be divided into three parts, domestic, inbound and outbound. Inbound travelling is almost zero as of now and commencement of domestic tourism has acted as a savior for this industry. Also, the tourism industry employed people at a large scale and this pandemic has affected the source of livelihood of many. In the session it was suggested, to rediscover India from tourism point of view which would not only help people know their culture but, more importantly, help generate employment in lakhs.

It was also highlighted that many of us are deprived of the fact that tourism is treated as MSME and the package of Rs 20 lakh crore introduced by the government specifically for

MSME sector has not been utilized by the players of tourism sector for bolstering this industry. Therefore, it is the responsibility of the institutions working in this sector to provide knowledge, training and facility to the people who are working in this sector. The idea of making 24 hotels out of 63 hotels of Himachal Tourism Development Corporation, as quarantine centers, is able to fetch them atleast 50% of the salaries, empower them to face such difficult situations. It was reiterated that Indian Tourism sector has unparalleled potential and needs to come up with "out of the box" solutions to revive this industry.

In his valedictory address, Himachal Pradesh Chief Minister Jai Ram Thakur said that Himachal Government had been making efforts to develop special tourist places to wean away tourists from popular places like Manali, Shimla, Kasauli etc. and divert their attention towards unknown, hidden and new destinations. He said the state government had launched a new scheme "Nayee Raahein, Nayee Manzilien, to woo the tourists in the post-Covid period. He suggested the novel idea of providing staying facility to the tourist by provisioning "Home Stay" facility which also helps to generate a new source of income. He also pointed to the eminent contribution of Atal Tunnel, emerging as a famous tourist destination to provide impetus to Tourism Industry.

Dr. Subhash Sharma
Director
CEPR

Dr. Ashwin Johar
Vice Chairman
CEPR

Way Forward

1. We need supply chain software, customer responsible software which not only help in detecting over burdened or unexplored places but also help in managing overbalanced tourists concentrated at one place.

2. Special consideration to the blend of Adventure Tourism and Religious Tourism will unveil new opportunities for everyone. Government through a central policy ,should formulate proper guidelines for registration of adventure tourism companies, accident reporting, establishing rescue centres with NDRF and NDMA at immediate disposal. Awareness campaigns for tourists should also be organised. Tracker information system (TIS) should be placed.

3. Making people conscious nationally and globally about offbeat destinations and quaint places will be a vital source for the growth of Tourism Industry. promote these places to leverage the resources present in India for the growth of Tourism Industry and hence for the growth of the country.

4. We need a Pro-active system which can monitor the entire regions, different situations which can prevent happening of bad incidents

5. The future of travel is female but what is holding most of the female tourists back is lack of safety and access to infrastructure facilities. Inducing female tourist by introducing reliable policies for females will set a new level for Indian Tourism Industry.

6. Objectives of Digital India is incomplete without digitalization in tourism industry which have tendency to provide modern aspect to Tourism Industry

7. Online booking,online/digital payment mechanism and modern digital services has increased the scope for OTAs (Online Travel Agents) but the onus of integration of online system lies on online tour operators.

8. Lack of proper infrastructure,poor safety management, unhealthy and dirty environment,miserable air quality and rising pollution have blurred the scenic beauty of Indian Heritage and Culture and should not be overlooked.

9. Provisioning of proper data management structure including data collection, data storage, and dissemination 100% accurate information about tourists, stakeholder or person responsible at a place.

10. Arrangement of proper communication and coordination mechanism that helps in flow of information at accurate at accurate and at accurate place.

11. Today people are more concerned about their health and wellness tourism in India is gaining popularity and require special attention. It can be promoted through collaboration with hotels,resorts etc and by ensuring better facilities.

12. Tourists/customer oriented approach is needed to provide impetus to domestic tourism. It includes understanding their psychology through reports and surveys and make arrangements similar to international tourist places that charm the tourists.

13. We need to develop a specific platform where the guides can upgrade their skills and knowledge, can learn any language. There is a need of training to the guides that help them to clearly communicate with authenticity so that right information can be communicated to the tourist.

14. It is predicted that in the coming days, huge spike will be seen in sports and event tourism sector. Therefore, it is become imperative to devise such policies that will unlocking the economic value of India's Meetings, Incentives Conferences and Exhibitions/Event (MICE), business events and destination wedding sector.

15. It is also becomes necessary to develop and monitor sustainable Standard Operating Procedures for tourism

industry during emergencies to overcome the gaps that arise due to such pandemics and other crisis in the future.

16. Medical tourism should be made competitive and attractive. An ecosystem needs to be created to provide cheap and specialized facilities. The staff should be qualified, trained and equipped,proper resources like water and food and hygienic room facilities should be given. Medical facilitators need to be educated and appointed

17. Emphasis should also be laid on the Indian wellness industry of Ayurveda, Yoga,Naturopathy and Organic foods. Accessibility to wellness centres should also be made easy .

18. Today ,The importance of yoga is globally understood due to the Initiatives taken by the government but very little is known to them about our 5000 year old science ,Ayurveda. The government needs to incentivise rigorous research in Ayurveda . There should be a single body which provides certification for institutions,practitioners,

medicines etc. to make Ayurveda reliable locally and globally.

19. We also need to promote the use telemedicine for portability,accessibility and delivery of service . A Standard operating procedure should be devised to identify the patient, his problem, a treatment flow,cost of treatment and so on. Feedback from the patient and continuity of treatment need to be ensured for efficacy.

20. Today people are becoming conscious and looking for sustainable ways to travel, 78% of Indians want to leave lesser footprints for wherever they travel. They also try to ensure that their travel positively affects the community of the place that they're travelling to which presents great scope to build on for Eco Tourism in India.

21. Media and Press have a strong influence on people's mind. This medium should be properly manoeuvred for positive image creation to promote tourism. Misconception, misunderstanding and miscommunication can be avoided by making people aware by rightly informing them.

Eminent Speakers

Sh. Prahlad Singh Patel, MoS (Independent Charge), Ministry of Culture and Tourism

Sh. Jai Ram Thakur, Chief Minister Himachal Pradesh

Sh. Sunil Kumar Sharma Former Cabinet Minister, Power, J&K

Sh. Satish Kumar, Rashtriya Seh Sangathak, Swadeshi Jagran Manch

Sh. Sanjay Tandon, Former State President, BJP,Chandigarh National Executive Member, BJP, Seh Prabhari,Himachal Pradesh

Sh. Vishal Jolly, Former State President BJP, A&N Islands

Dr. Subhash Sharma, Director, CEPR

Sh. Ashish Kumar, Co-Chairman FICCI Travel Technology Committee

Sh. Vikal Kulshreshtha, Director Tourism, Gabbit Systems

Dr. Ashwin Johar, Vice Chairman, CEPR

Sh. Vipul Jain, Founder & CEO,Gabbit Systems

Smt. Sagnika Chowdhury, Co-Founder,Head of Growth, DevDarshan

Smt. Rashmi Chaddha, Founder & CEO, Wovoyage

Smt. Bharti Maan, VP- SAP Service Line, APAC, Capegemini

Sh. Prashant Pitti, Co-Founder, Director, easemytrip.com

Sh. Dharamveer Singh Chouhan, Co-Founder & CEO, Zostal

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Sh. Santosh Sharma, Co-Founder CEO, Foresee Aviation, Founder, BookMyJet

Smt. Tripti Somani, Founder, Womennovator & CEO,KGS Advisors

Sh. Brijesh Jaiswal, Sr. Advocate Punjab and Haryana High Court

Prof. Prashant Gautam, Professor Panjab Univeristy

Sh. Sandeep Dayal, Sr. Consultant & Advisor Ebix Inc. (Mercury Travels)

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