

IMPACT OF COVID – 19 ON INBOUND TOURISM IN INDIA

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*Institute of Management Studies, Bundelkhand University, Jhansi***Abstract:**

India with rich culture and heritage have been attracting huge influx of foreign tourists. These foreign arrivals strengthen our tourism industry and sectors related to allied services. Estimated 10.8 million foreign tourist arrivals was recorded in the year 2019, that shows a graphical upsurge of 3.2 percent year by year, contributing to US\$ 29.9 billion to India's foreign exchange earnings (9). After the December 2019 corona COV-2, outbreak in Wuhan, China, this viral infection spread to other countries outside China taking the shape of pandemic infecting thousands of people all over the world. Therefore, World Health Organization (WHO) on 30th June, 2020 declared the condition as "Public Health Emergency of International Concern" (PHEIC), and came out with travel restrictions all around the world.(65) A situation of complete lockdown was also announced by several Governments including India, which severely crippled moments. This ultimately culminated in a severe impact not only on inbound tourist arrivals but on entire tourism industry, consequently a serious downfall in tourism economy was observed.(37)

Therefore, this study was intended to explore the re-opening avenues and opportunities to re-establish the glory of tourism industry and allied sectors, also analysis of different impact factors on tourism industry and economic growth. To achieve this status we had to investigate various digital-non-digital sources. We also inquired the facts about tourism activities from different sources like tour operators, travel agents or hotel management etc. Aanalysis was done using descriptive and analytical study design having meticulous record review. We delved into the pre and post economic scenarios of Indian tourism using economic indicators.(25) The aim of this study was to evaluate the quantum of impact on tourism and economic growth after the COVID-19 pandemic restrictions.

Keywords: Tourism, re-opening business models, India, COVID-19 pandemic.

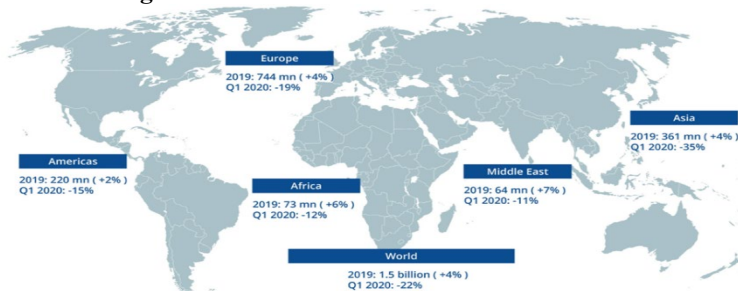
JEL Classification: Z30

I. INTRODUCTION

COVID- 19 is one of the unknown emergencies faced by almost every country in terms of health, social,

and economic aspects. Almost all the sectors were affected by this pandemic and Travel & Tourism is not the exception. According to UNWTO, report 2019, the international tourist arrivals decreased and incurred loss of US\$ 30-50 billion.to tourism sector.(34)

Figure 1: Global distribution of Tourist arrivals



Source: World Tourism Organization (UNWTO) (23)

Figure 2: Nationality wise Foreign tourist arrivals in India 2018

Source: Market Research and Statistics, 2019

II. COVID-19 AND THE WORLD TOURISM INDUSTRY

Tourism has become one of the fastest growing sectors in the world economy (2) and its importance as a driver for generating income and employment to many developed as well as developing economies of the world.(9)Tourism is also responsible in the development of many countries in terms of infrastructure, transportation, also in the sustainable development of environment, culture, and heritage.(3) In the year 2019 the share of tourism industry in the world GDP was USD 8.9 trillion, creating 330 million jobs worldwide (Mitra A et al; 2019) and contributing to 10.3 percent of total global employment.(28,33) Thus tourism industry witnessed the growth of 3.5 percent as of 2019.(28)

The COVID-19 pandemic has activated an unmatched crisis in the tourism economy, imposing an immense and immediate shock to this sector, viz - 67 million fewer international tourist arrivals results in USD 80 billion lost in exports because of 100% travel restrictions in the destinations. (29) The COVID-19 pandemic had a notable effect on the world tourism industry. Because of the travel restrictions, resulted in significant decrease in the demand among tourists. The tourism industry has been enormously affected by the spread of coronavirus,(covid-19) consequently many countries had to impose travel restrictions in an attempt to restrain its spread.(38) The United Nations World Tourism Organization (UNWTO), estimated a decline of 20-30 percent in the global international tourist arrivals by 2020 which leads to a potential loss of USD 30–50 billion (24,44). In many of the world's counties, cities, and regions planned travel had gone down by 80–90 percent.(3)

The Travel & Tourism status in India – Economic growth and employment generation.

- International tourism to India is one of the major source of foreign exchange earnings for India

which is responsible for increase in the revenue for all the allied sectors of tourism like hospitality, food and service industry and aviation.(7)

- According to the data published in the India Tourism Statistics, 2019 shows that India received maximum number of tourists from South Asia which is 33 percent of the total foreign tourist arrivals in India.(26)

- In 2018, travel & tourism contributed 9.2 percent in GDP of India, and generated 26.7 million jobs. This industry provides opportunities of employment and creates significant earning base for both urban and rural populations.(29)

- The restaurant industry in India has an annual turnover of approximately \$53 billion. (34)

- It is estimated that in India, branded and organized hotels annual revenue is \$5 billion.(28)

- The travel and tourism sector accounts for 12.75 percent of employment in India, from which 5.56 percent is direct and 7.19 percent is indirect and 87 million people were employed in the travel sector in 2018-19 in India, according to the Ministry of Tourism (MOT) annual report for 2019-20. (17)

- This industry provides direct employment to more than 7 million people. (27, 33)

- India's air transport industry employs over 400,000 people directly and 940,000 are employed in related supply chains.(16)

Impact on tourism and economic growth -- Tourism share in the India's GDP was around 10 percent in the year 2019 and due to the crisis it is expected to decrease heavily by this year.(22)The sector also drives regional development, directly supports numerous types of jobs and businesses and underpins many local communities in some of the regions which are going to be a great loss for the developing economy like India. As of 2019 the sector directly contributes, on average, 9.2 percent of GDP, in service exports and 4.2 crore jobs were created in

the tourism sector in India which was 8.1 per cent of total employment in the country. The number is expected to rise by 2% per annum to 52.3 million jobs by 2028.(34)

It is also estimated 40 percent decline in revenue generated by travel and tourism as compared to that of 2019.(23) A study by CARE ratings, notes that the figure corresponds to a 40 per cent decline in revenue in 2020 over calendar 2019.(36) According to the industry experts, Indian tourism industry will incur Rs 1.25 trillion revenue loss in 2020 due to the shutdown of hotels and suspension in flight operations after the onset and spread of the Covid-19 pandemic.(29)

During April to June, 2020 the Indian tourism industry is expected a revenue loss of Rs 69,4000 million, indicating a year-on-year loss of around 30 percent by the various travel restrictions imposed by the Indian government as well as governments across the globe, Forward bookings, for various conferences and leisure travel bookings to foreign destinations have already been cancelled which will be the major reason in the loss for this industry.(20)

Thus the present study focuses on impact of covid-19 on Inbound tourism, economic growth and suggests some re opening modalities in "New normal" recovery plan.

III. OBJECTIVES OF THE STUDY

I. To assess the pre and post tourism industry economic indicators following COVID-19 pandemic.

II. To assess re-opening modalities and opportunities related to tourism industry after (COVID-19) pandemic.

III. To analyse the different impact factors in tourism and allied industries in COVID-19.

IV. To evaluate the quantum of impact on tourism economic growth after (COVID-19) pandemic.

V. To suggest the measures for strengthening the tourism economy after COVID-19.

Study Design

The study design included detailed record reviews which are available in public domain. Analytical and descriptive study.

Study Period

The study has collected and considered data upto July, 2020 to examine the impact of COVID-19 on Indian Tourism Industry.

VI. Research Methodology

Researcher collected the relevant data from various sources from academic to professional institutions, some of them from precious Government reports, survey data, Govt. annual and research reports, Government and non-government organizations, tour operators' research, agencies' reports and newspapers. Updates from the period of inception of COVID-19 pandemic January, 2020. These data were meticulously reviewed by us constantly. Having collected the data, the analysis was done by using suitable statistical tools. An inference was drawn for further action.

Tourism in India pre and post COVID-19

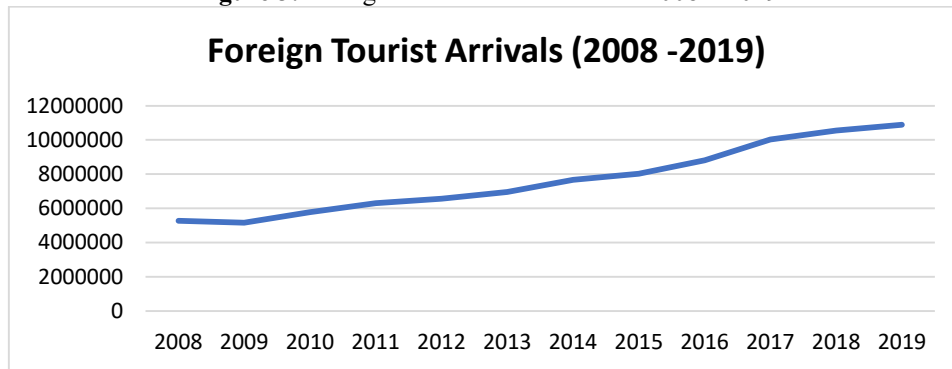
According to the Travel and Tourism Competitiveness Report 2019, India has ranked 34th up six positions from 40th in 2017.(28)The country received nearly foreign tourists in 2019 and was expected to increase by 2020 before the pandemic occur. India's position becoming stronger year by year in terms of International tourist arrivals.(9)

India recorded over 10.8 million foreign tourist arrivals into the country in 2019 and recorded 3.2 a percent year by year growth and accounted for approximately US\$ 29.9 billion in foreign exchange earnings.(9) The rate of growth was higher than the global travel and tourism industry according to the WTTC report 2019.(19)The contribution made by the tourism industry to the Indian economy in 2019 was USD 194 billion.(28) It was expected to achieve a growth rate of 6.9 percent during 2019-2028 to reach US\$ 460 billion approximately 9.9 percent of India's GDP by 2028.(20) These were the expectations of the industry before COVID -19 pandemic to narrow-down 7.8 percent unemployment rate among 1.3 billion population of India.(48)

Current scenario points to declines of 66.4 percent in foreign tourist arrivals for March 2020 as compared with the same period last year and the recovery will depend on the speed of the containment and the duration of travel retractions and shutdown of borders, although the outlook remains highly uncertain (24).

In 2019, the decreasing number in tourist arrival was due to COVID -19, in the last three months (26).

Figure 3: Foreign tourist arrivals to India 2008 – 2019



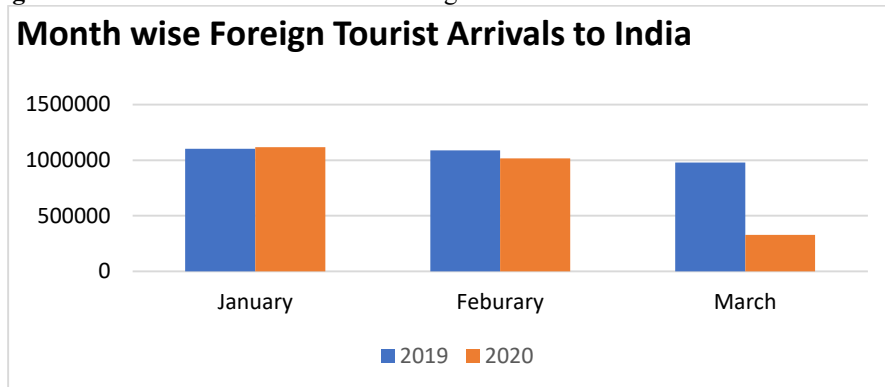
Source: Market Research and Statistics, 2019 & Tourism at a Glance, 2020

The table below shows foreign tourists flow to India from 2008 to 2019 and it shows how the destination is gaining its popularity.

The *graph shows (fig 3)* an increasing trend in the growth rate in its International tourist arrivals from the year 2008 till 2019. India’s growth rate from the year 2018 to 2019 was 3.2 percent but due to the COVID-19

pandemic in the first quarter of 2020 itself India received a decline in the growth rate of foreign tourist arrivals by 22.31 percent as compared to the first quarter of 2019 (17).

Figure 4: Months wise decline in the foreign tourist arrivals to India due to COVID 19



Source: Brief Note on FTA (2020), Ministry of Tourism, Govt. of India

In this pandemic,(figure-4), if we compare the three months data from January 2020 to March 2020 with the same months of 2019 we may easily notice the

downfall in the foreign tourist arrivals to the country due to this crisis and several travel restrictions (34).

Table 1: Showing changes in tourism economic development indicators due to COVID-19 since July, 2020 as compared to that of 2019:

Tourism Economic development Indicators	2019	Change due to COVID-19(Jan-July, 2020)
World Tourism industry	3.5%	58 -78% decline(24,34)
Indian Tourism industry	3.2%	60 -80% decline (9,63)
Indian International tourist arrivals	3.2%	60 – 80% decline (9,63)
Jobs in the global travel and tourism sector	330 million jobs	30% decline (18,38,49)
Jobs in the Indian travel and tourism sector	27.404 million	12 -14% decline (38,49)
Hotel occupancy levels/rate	66.7%	20 -40% (36,62)
Aviation Turbine Fuel (ATF)	16.3%	24.23% (23)
Revenue from Restaurant industry	4 trillion	40 -50% decline (37)

Revenue from hotel & hospitality industry	8.6 %	27 -32% decline (37)
Jobs in restaurant industry	7.3 million	2 million decline (29)
Air passenger traffic in India	316.51 million	47% decline (57)
Revenue from Aviation industry	USD 72 billion	USD 11.2 billion decline (57)

Sources:UNWTO, India Tourism Statistic-2020 and Newspapers (The Hindu, The financial Express & Economic Times).

Recovery plan and re-opening modalities

Tourism is a significant part in weighting backbone of global/national economies. The covid-19 pandemic causing immediate and immense shock to the tourism sector. This pandemic would affect the wider economic scenario all over the world. As governments around the world have introduced unprecedented measures to contain the virus, restrictions on travel, business operations, and people-to-people interactions, have brought the tourism economy to a standstill. Many countries are now entering into a new phase to fight against the covid-19 while at the same time managing to re-open the travel and tourism opportunities (25) as found in a research conducted by Trip.com Group in collaboration with Google 2020, Free cancellation of bookings, Flexible pre-sale bookings, & Insurance coverage were important measures could be undertaken.(25)

According to Jane Sun - CEO Trip.com Group in a study identified three key trends in Tourism: First, people are very cautious about health guidelines so working closely with our partners to ensure hotels, airlines are safe partners. Second, people prefer to travel within smaller groups as family and good friends. Third, demands that used to be for outbound travel now turning to a domestic travel. (25)

Packages with rental cars and hotels are more popular says Jane Sun. (25)

Along with these action plans, a strong coordination is earnestly required to successfully implementation of the reopening strategies and measures thereof.Tourism, itself is not a single sector, rather combinations of various allied service sectors.Support and cooperation from allied sectors and stakeholders are earnestly needed for smooth running of the business More attention needs to be given to the most sensitive and/or vulnerable tourism destinations in the recovery phases.

Impact factors in Indian Tourism & allied Industry in COVID- 19

This is a complex and challenging task, and difficult also in quantifying the impact on the tourism economy. Five months into the crisis, the situation continues to evolve uncertain and the outlook remains ambiguous. Recovery is now expected to start later and be slower than previously foreseen.(45)Travel restrictions and containment measures are likely to be in place for longer, and are expected to be lifted only gradually, with the possibility of reversal should new waves

occur.(36) Even when tourism supply chains start to function again, new health protocols, main businesses will be operating at restricted capacity(36). Demand-side recovery will also take some time, given the interlinked consequences of the economic and health crises, and the progressive lifting of travel restrictions, while consumer confidence and travel behaviour will be more deeply impacted the longer the pandemic goes on. In India, Inbound tourism flows, plays significant macro-economic effects on its foreign exchange earnings and it also supports various regions and cities where the sector supports many jobs and businesses. Beyond the tourism economy, the pandemic has triggered a global economic crisis also and many economies are falling into recession. This COVID -19 has very tangible impacts for the tourism sector, which is critical for many people, places and businesses, with the impact particularly felt in the states, cities and regions where tourism is an important part of the economy (26).

- On account of COVID- 19, the Indian tourism and hospitality industry is expecting a potential job loss of around 38 million (20).
- In the month of March 2020 itself, the hotel sector saw a decline of more than 65% in occupancy levels as compared to the same period in 2019 (28).
- As the international and domestic travel on halt, cause a decrease in the demand for turbine fuel in the country (9).
- Indian Association of Tour Operators (IATO) estimates the hotel, aviation and travel sector together may suffer a loss of about ₹85 billion keeping in mind the travel restrictions imposed on foreign tourists.(27)
- Impact of Covid-19 would be felt on both blue and white - collar jobs (31).
- India’s Inbound and outbound travel will witness an all-time low (18,26).
- The restaurant industry in India is expecting almost zero revenue in the immediate term, and a drop of 50% in the months to come.(19)
- Hotel and hospitality industry also expecting a loss of 30 percent in revenue if the situation doesn’t improve by the end of June 2020 (26).
- There is a threat of job loss of nearly 15% in the hotel and restaurant industry once the lockdown is lifted, as they will not see an immediate surge in demand. (18)
- Aviation industry in India could incur losses worth ₹ 27,000 crores (\$3.3-3.6 billion) in the first quarter of 2020-21.(9)

- The passenger growth of airlines is likely to fall sharply to a negative 20-25% growth for 2020-2021. (9,16)

Understanding COVID-19 impact through SWOT analysis (1,2,21,30)

Strength

- Time to explore new forms and mediums of tourism.
- Inquire about the unique uses of Information technology in tourism
 - Time for assessment in all the aspects of travel and tourism industry
 - Proven capacity of the tourism sector to recover in past crises.
 - Domestic tourism can be a buffer.
 - The sector is also having the adaptation capacity in terms of trips closer to home, safety and hygiene protocols, and value for money, responsible consumer behaviour. Government support to the sector

Weaknesses

- Perception of travel as a risk in this pandemic.
- Low demand is expected in restarting tourism due to social distancing and travel restrictions after COVID 19.
 - Decrease in the travellers' confidence.

Opportunities

- New business model can be formed.
- Encourage innovation and digitalization.
- Sustainability and sustainable-oriented segments (rural, nature, health)
 - Many countries initiated de-escalation phases toward the 'new normal'
 - Some destinations and companies started their adaptation plans.

Threats

- Negative impact on world economic environment like world recession, rising unemployment and jobs at risk, closure of business mainly SMEs, reduction in the individuals' disposable income.
 - Uncertainty weighing on consumer and business confidence level.
 - Uncertain length of pandemic and vaccine unavailability.
 - Extent of lockdowns and travel restrictions.
 - Unknown form of the 'new normal'.

Suggestions and Recommendations

On the basis of our study findings, the following suggestions are put forward:

1. Adopt "New normal" protocols guidelines.(WTTC guidelines (2020))
2. Recovery plans should be formed by ensuring customers' safety and hygienic travel.
3. Tourism firms should adopt "mobilize and connect" strategies for employment loss by utilizing locally available manpower.

4. Packages with Rental cars, Hotels & Restaurants.

5. Need to conduct research on tourist behavior, and destination development.

6. Public education programme to eliminate myths & misconception related to covid-19 during travel and stay.

IV. CONCLUSION

It is assumed, after the half fiscal year that the impact of the virus would recede however, uncertainty prevail. In the wake of covid-19, it is expected that the foreign tourist arrivals continue to be low and keep on affecting the foreign exchange earnings of the country by about 50 percent as per the impact report (18,35). As the most detectable and instantaneous effect of Covid-19 could be exhibited by all its geographical segments like inbound, outbound as well as domestic travels, and almost all verticals like leisure, adventure, heritage, MICE (Meetings, Incentives, Conferences & Exhibitions), cruise and corporate activities with the various travel restrictions imposed by the Indian government as well as governments across the globe (34). In the phase of strategy formation for re-opening and recovery of the industry in this COVID-19, the major considerations are-first how long this pandemic is will going to remain and when the vaccine or specific treatment will be available, secondly how and when countries will start easing the travel restrictions, third may be how will social distancing rules affect tourism demand and supply, fourth can be how to gain consumer and business confidence fifth is how long it will take consumers to resume their travel sixth is how deep and long the global recession will be and what measures can be taken to overcome it and lastly, how government and business cooperation would build up to form supporting measures for recovery in industry.

For the easy recovery and redevelopment plans it is important that all the sectors work in tandem with ecosystem that encourages all the stakeholders and/or investors including the government to work together and form sustainable and innovative business models for this industry. The Indian tourism industry was in its developing phase and growing year by year.(13) Now this is the opportunity to re-assess, re-evaluate and develop more innovative business models and adopt certain protocols as developed by World Travel and Tourism Council (2020) to cover the "New Normal", for provider as diverse as airlines, shops, hotels, restaurants, cleaning, sanitation, protective equipment such as masks, thermal screening tools, infrared scanners, gloves, and reduced touch -points (contact less travel) and queuing will all shape the travel experience for some time in covid-19. These measures would be beneficial to attract more and more tourists, so as to commensurate with the growing demand for this historical and culturally rich destination-India.(4,14) Governments need to consider the longer-term implications of the crisis, while staying ahead of the digital curve, supporting the low carbon transition

and promoting more investment and budgetary allocation, with focus on the structural transformation needed to build a stronger, more sustainable and resilient tourism economy. The crisis is an opportunity to rethink tourism for the future. **Looking ahead, the measures put in place today will shape the tourism of tomorrow.**

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