

Green Tourism: The Road Ahead after COVID-19

Namrata Kishnani*

Abstract *Travel & Tourism being the largest service provider industry (value worth US billion \$234) have been increasingly contributing third highest Foreign Exchange Earnings with a double digit growth (17.1% in Mar, 2018). It has been in limelight since past few years with the Ministry of Tourism taking few remarkably significant steps to increase the value and volume of foreign tourists arrivals (FTAs) with phenomenally customized tourist attractions like e-visa, subsidized packages to religious places, golden circuit, royal trains like Palace on wheels and participating in tourist marts within and outside the country exhibiting the destinations, food & cultural diversity. As per the reports of The World Travel and Tourism Council (WTTC) India grossed about 9.2% of total GDP value in 2018 with revenues exceeding \$240billion along with financially supporting direct/indirect employment opportunities (42.67 million jobs or 8.1% labour force). The recent health and financial emergency of Pandemic COVID-19 which has affected every sector of economy with world over lockdowns shutting down the growth engines of modern economy for quarter nearly i.e. have risked employment of millions across. The sluggish economic growth and declining consumer purchasing power with loss in positive sentiment / behaviour due to economic fallout, unprecedented unemployment statistics going above the earlier recession will eventually be a debacle for the Hospitality and Tourism industry with an expected loss of more than \$ 125 billion. The research study aims to create an in-depth understanding of challenges faced by the Tourism industry in the current pandemic situation and consumer sentiment. The findings prove a declining consumer sentiment with tourism associated activities. However an increasing awareness on environmental and sustainable development will prove to be a game changer for Wildlife and ecotourism destinations within the country apart from countryside travel to hometown rather than expensive and riskier foreign travel. The inferences drawn are in confirmation to governments "Dekho Apna Desh" and Incredible India program.*

Keywords: *Tourism, COVID-19, Wildlife or Ecotourism, Dekho Apna Desh*

INTRODUCTION

Hospitality and Tourism Industry have taken a big blow with the onset of pandemic and extended lockdowns globally with closure of international airspace, railways, hotels/ restaurants, museums or other attractions since early march. This sector generates an estimated employment of 10-12 % directly or indirectly (nearly 5 crore people) in India is experiencing one of the most difficult times in history due to imposed lockdowns and cancellations from all over the world in peak season. With little hope of staggered partial openings in the second quarter due to rapid transmission of virus with unprecedented losses and glooming uncertainties.

Tourism and Hospitality industry being one the largest service industries has been an integral part of India's growth

story since the last two decades. With an annual growth rate of 11.9% it contributes 9.2% to GDP (huge foreign reserves) and is the third largest employment generator (42.7million). Since the last decade it has been the apple of eyes for the government at central or local level who lately realized its potential by taking few concrete steps. It comprises of easing e-visa process from 166 countries, 24*7 hour helpline on mobile app, apart from unparalleled rich diversity and customized tour packages catering to various customers like PRASAD, Bharat mala, ecotourism, natural escapades, adventure, religious, historic, medical or wellness tourism(niche product) and identifying fifteen circuits under Swadesh Darshan. It aimed at creation of an ecosystem thriving on infrastructure, technology and capacity building programs lately catching the eyeballs from its incredible India 2.0 campaigns.

* Assistant Professor, Department of Management, The Bhopal School of Social Sciences, Madhya Pradesh, India.
Email: namrata.kishnani267@gmail.com

The emergence of the middle class double income families having more disposable income led to noticeable spurt in outbound or domestic tourism which set the reformative stage for reviving the tourism policy 2002. It incorporated development and positioning of sustainable tourism products for weekend getaways, destination tours or MICE through 100% FDI or PPP mode of capital infusion, digital tools for planning, reservations or sharing experiences. Thus registering a continuous growth in foreign tourist arrivals (9.36 mn in 2018 compared to 8.86 mn in 2017 Jan -Nov) and foreign exchange earnings (a 11.9% growth from \$20.3 bn in 2017 to \$22.71 bn in 2018) leading to jump of 31 places in ranking between 2013 to 2019 in World Economic Forum Travel & Tourism Competitiveness Index. India stands third in terms of inward investment of US \$ 45.7 billion in 2018.

Recent Steps for Development of Tourism Destination

- Adoption of a Heritage Project and iconic sites by all states under 'Ek Bharat Shreshtha Bharat' and Dekho Apna Desh motivating indigenous tourism developing action plans for heritage city development and augmentation yojana (HRIDAY) and revisiting socio-cultural and financial linkages with 39 Indian Ocean countries for capacity building, marketing and environmental dynamics under Project Mausam-historic maritime deal.
- Celebrating Paryatan Parv and Bharat Parv by Federation of association in Indian tourism and hospitality (FAITH) in partnership with the Ministry of Tourism and state government exhibiting the rich cultural diversity.
- Incredible India Website and mobile app in nine foreign languages focusing on niche areas like heritage, culture, spirituality, yoga & wellness, wildlife and so. It also incorporated an online learning management system to facilitate skilled tourist's service providers.
- Promotional campaigns to suit the needs of diverse interest groups with influence of social media, printed or digital tools, or outdoor campaigns like Great Indian Blog Train, airline or railway tickets.
- e-Visa in five categories-business, medical or attendant, conference, tourists from 26 designated airports.
- Degree or diploma programs for training in hospitality, culinary or administration under National Council of Hotel Management & Catering Technology, Indian Culinary Institute (ICI) at Tirupati and Noida, Indian Institute of Travel & Tourism Management.

However the recent health and economic crisis have affected all walks of life. UNWTO predicts a fall of 22% globally with 67 million less tourists resulting in a fall of economies

with bleak chances of recovery in next 12-18 months with maximum impact on Asia-Pacific. Complete lockdown and partial opening have left many people stranded and incessant psychological impact on the minds of people. As per FAITH it has rendered around 3.8 crore unemployed leading to cascading effect followed by large scale retrenchments, bankruptcies or liquidation visible in hospitality. Travel for business or any other emergencies (medical, education & so) is only left with prior permissions from the government. However, the new work from home(WFH) have dissolved all existing boundaries of work and personal life resulting in more stress, discontentment and uncertainties wherein generation Y travelers are browsing for weekend getaways, business plus leisure trips to indigenous natural / wellness landscapes, few hours drive with good internet connectivity ensuring safety, health and hygiene norms. Conscious search for curated travel at affordable rates is on the priority list of all stakeholders looking for government supportive deliverables. (Stimulus packages like reducing taxation, fees, visa fees, bridging technical and digital divide) While indigenous tourism (wildlife, religious, wellness, or so) can be a sustainable solution for faster recovery.

Research Objective

- To study the impact of COVID-19 on Indian Tourism & Hospitality sector.
- To know the consumer sentiment with respect to tourism & hospitality.
- To identify prospects of green tourism as sustainable means.

Research Methodology

The study adopts a comprehensive approach comprising collecting responses from 180 respondents through circulation of google form. It examines multitude published reports, research articles available both online or offline broadly consisting research reports of well known research agencies like McKinsey, UNWTO and various research papers. The researcher interviews and investigates the changes in tourists sentiment and behaviour post COVID and their willingness to travel through statistical tools in Excel and SPSS.

Review of Literature

The pandemic has triggered an exceptional crisis in all sectors, tourism being one of the most affected (OECD, 2020). The latest UNWTO estimates point out a fall of nearly 80% in international tourists arrivals incurring a loss of \$ 1.2 trillion export revenues. The World Travel and Tourism Council

(WTTC) forecasted about 100.8 million job losses. However most of them expect a quick recovery in domestic tourism restoring traveler confidence by ensuring health & safety protocols. There is a sudden change in behaviour of tourists with a drift towards regional or national parks in China which lifted the curbs some time back. Tourism businesses are looking forward to aggressive pricing promotional strategies on social media handles targeting the younger segment with enhanced safety measures. Many countries are expected to lift out curbs gradually with proper monitoring to recover the economy with proactive policy measures of government and stimulus for destination branding (McKinsey & Co).

Consumer behaviour has always been the focal point of tourism research narrative review of quantitative and longitudinal researches which discuss key concepts, external influences and opportunities primarily decision-making, technology, socio-psychological influences, ethical consumption and lifestyle of Generation Y on tourism behaviour. (Cohen et al., 2014) Gen Y basically referred as netizens are more frequent travelers than former. They have access to more information and seek immediate gratification of needs. The transformation in the way people interact, socialize or share information have led organizations to divert their marketing spends on social media platforms (M. Ali & O. Ahmed, 2019). The study further develops a conceptual model based on usage of user generated content for travel communities and its impact. Thereby enhancing the existing knowledge on factors like customer characteristics, source and content credibility as antecedents for making well informed choices and strategically position products using social media platforms.

U.N Environment Programme (UNEP) states Sustainable tourism as one of the most reliable tools for conserving the resources, culture along with aiding economic growth, employment opportunities and so on. (Sutar, Education et al., 2017) Tourism has been the fastest and largest contributor to socio-economic growth of Andaman & Nicobar Islands apart from fisheries, horticulture and agriculture. It has significantly contributed in exchange of technology, markets, commerce and industry. The researcher finds five A's – Attraction, Accessibility, Amenities, Accommodation and Activities to engage tourists in culture, cuisine and community by employing local people for inclusive economic growth. It shall be further aided by local and state government's sustainable tourism initiatives at multiple levels from promoting, project approval, monitoring or creating awareness within the community for pro-environment measures. The researchers suggest an active role in capacity building, skill development and awareness complying with policy measures benefiting the community. Pro environmental strategies focusing on quality of technical, marketing and scientific research activities delivering value

propositions to gain competitive advantage. (Zaušková et al., 2015) The researcher suggests eco-innovations as significant innovative marketing communication for increasing eco-consciousness and processes for sustainable businesses.

Changing lifestyle, work and personal commitments have made tourism a core element for recreation, leisure or business along with its environmental impact. Various researches confirm the spillover effects domestic tourism and potential consistency to address environmental impact. Pro-environment behaviour of domestic tourism addresses concerns of resulting consumption behaviour and environmental impact resulting from recreational travel. (Xua et al., 2020) The research adopts five tourists excursions (a nature reserve, scenic area, holiday resort forest reserves and cultural attraction) in China June 2017 suggesting a strong relationship between PEBs environmental attachment and domestic tourism which could be encouraged by interactive experiences and practices.

(Carret al., 2016) Indigenous tourism pertains to development of tourism products within the hinterlands highlighting the unique cultural values apart from socio-economic empowerment. Various research opines its instrumental role in conserving cultural landscape, environment and socio-economic well-being. The key lies in up-skilling the operators and community through relevant capacity building programs and commercializing destination brands using social media. (Acharya & Halpenny, 2013) Natural beauty and rich cultural diversity without extensive investment in infrastructure has made home stay tourism one of the attractive opportunities for developing countries. The study discusses the avenues of home stay tourism for exhibiting the natural inhibited beauty, rural community and socio-cultural intricacies of a destination without overcrowding or disturbing the ecological balance. It has further suggested its role in promoting pro-women tourism, gender equality and sustainable development. It has also addressed the concerns of economically disadvantaged groups bringing social equality.

(de Bloom et al., 2017) Tourism industry thrives on improving wellbeing and rejuvenating people through holiday travel or excursion trips. Respondents were investigated on three occasions behaviour, cognition and emotions during free evenings, weekends at home or domestic travel for five week longitudinal field study. It was found they engage in more physical travel and social activities during holiday rather than obligatory activities during free evenings. It is profound that tourism activities reduce mental pressures with physical and geographical remoteness increasing productivity. Staycations and domestic holidays close to home are the new base model which will reduce environmental threats and cost effectively.

Findings

The study collected responses of travelers of various age groups using google forms to know about travel preferences from 268 respondents across India comprising 57% males and 43% females classified under four working age groups 18-65 yrs. 85.7% respondents own a car with 62% married and 74% living in a family of 4 or more people who prefer travel with family or friends. Majority respondents (78%) are missing their usual holidays, excursions or outdoor entertainment however baby boomers (age 55 yrs and above) are more fearful to catch the infection and avoid outdoor trips. While generation Z and Y i.e. Millennials are more stressed financially due to pay cuts or job losses due to underlying uncertainties. 64% respondents are inclined to travel when things improve economically and vaccines are developed thereby signals rebounding of travel gradually. But 79% are inclined to travel for leisure or holiday while 39% respondents plan to defer their travel plans for more than a year or until the vaccine comes. A minority of 14% expect business travel as they expect companies to cut on travelling costs with work from home and video conferencing or meetings picking the pace.

67% respondents wish to take a holiday enjoying natural landscape, beaches, wildlife reserves followed by historical or rural outskirts. 89% respondents would like to explore domestic landscapes to nearby less populated places avoiding any public transport and health hazard. Safety and hygiene as preceded all other priorities like cost, they prefer to stay in home stays, friend's or relative's home or well-known branded hotels following all precautionary health SOPs giving less importance to economy. They are likely to spend more on maintaining hygiene (80%), safe lodging (68%), transport (79%) or so instead of shopping, food or excursions. 69% respondents rely on websites rather a handful on agents or visiting outlets for booking a holiday as most of their travel is influenced by user generated digital content through friends (36.3%), social media (19.6%) and blogs & website pages (27.4%). There are only 19% travelers who would like to travel alone while the rest of them are with family or friends.

There is a significant difference between age and shift in travel preferences and holiday destinations with a chi square value of p value = .407 and .414 between income and shift in travel preferences. There is a significant difference between age and preference for holiday destination with p value .211 however there is no significant difference between income and preference for holiday destinations. Thus this indicate companies can target those in high income bracket and relatively young population who are less fearful and like to travel for relieving stress.

It found that about 25% would like to travel by air while most of the travelers have shown high preference for

personal cars which is nearly 57%, suggestive of spurt in weekend getaways or tourist destinations / resorts. Safety guidelines and hygiene like regular sanitization of rooms, bed linens has topped the priority list for travelers (74%) followed by social distancing at restaurants, or hotel staff (65%) economic cost with no advance payments / free cancellations (25%) and other factors like room service, on call doctor, etc. Most travelers chose to travel for a duration of 4-7 days(43%) followed by 1-3 days (42%) as most of the travelers foresee a value centric/ economic holidays as a change in their spending. Thereby the customers are likely to be swayed away with ensured precautionary measures like enforced social distancing and hygiene less crowded and economy as part of the package.

CONCLUSION

The unprecedented crisis in the tourism & hospitality sector because of COVID-19 will be instrumental in bringing significant changes that will transform the industry outlook forever. Managing the recovery will need some coordinated efforts yet economically viable and sustainable. The fear of virus and macroeconomic changes as indicated by the findings has restricted the wanderlust in travelers not lost. As per visionaries responsible companies will weather the storm while non-creative will slowly exit the market. HTL India sentiment survey of Indian hotel industry reported an expected loss of over 30% in revenues in this financial year according to 85% respondents. The Travel & Tourism industry will not be the same as before with consumers becoming more sensitive to environmental concerns, change in preferences towards natural hinterlands and landscapes in domestic nations. Domestic travel for leisure or business to unexplored indigenous places in natural set-up in home stays or resorts will gear up with relative push of local government. Safety protocols and economic value propositions will be key differentiators for next few months. However industry expects government stimulus in the form of GST waivers, loan moratorium and tax rebates to overcome macroeconomic challenges in distressed times to sail the sinking ship.

Suggestions

Many Economies across the world that rely on the tourism sector as the highest gross revenue generator like Europe, Mauritius, Singapore, Hong Kong and so are reopening with customer centric strategic outlook. Indigenous tourism products with greener landscapes and responsible behaviour are believed to be the silver bullet. A smarter marketing push to green or sustainable tourism with collaborated project teams, policing and stimulus will share the economic load.

Users generated engaging digital content on social networks to garner travelers' interest in eco-destinations will be a

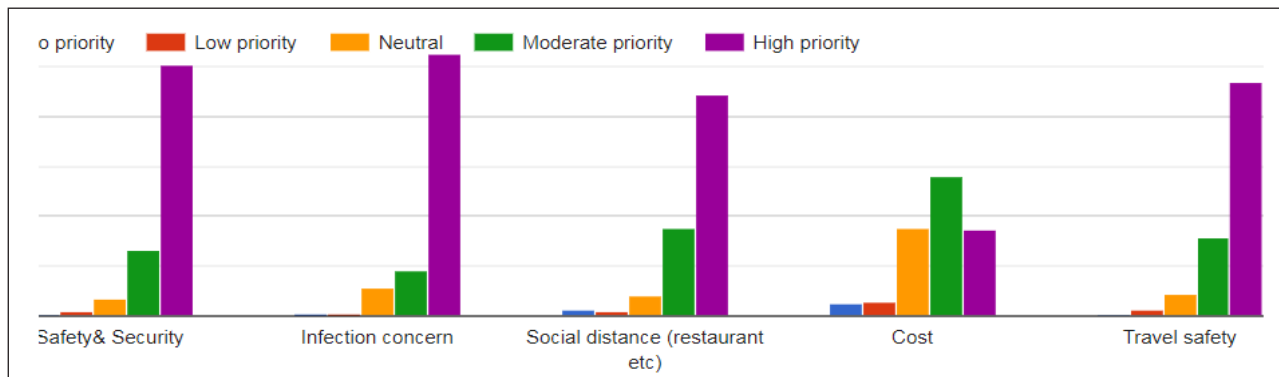
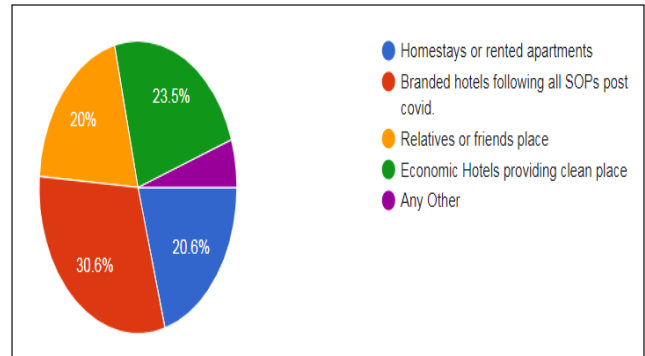
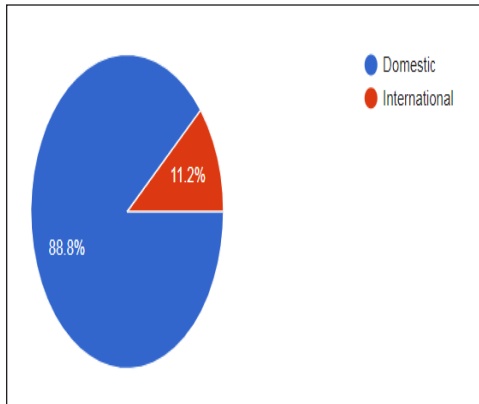
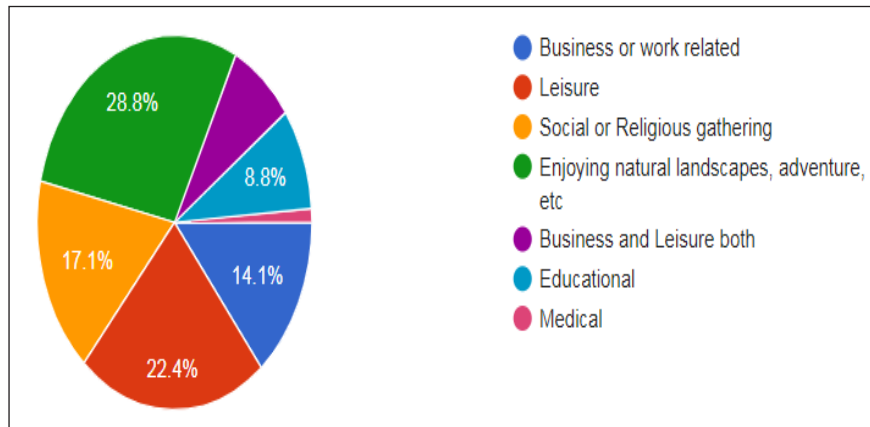
catalyst in addressing growing energy and environmental concerns of millennial and generation z which will lead to development of indigenous ecotourism products and independent properties.

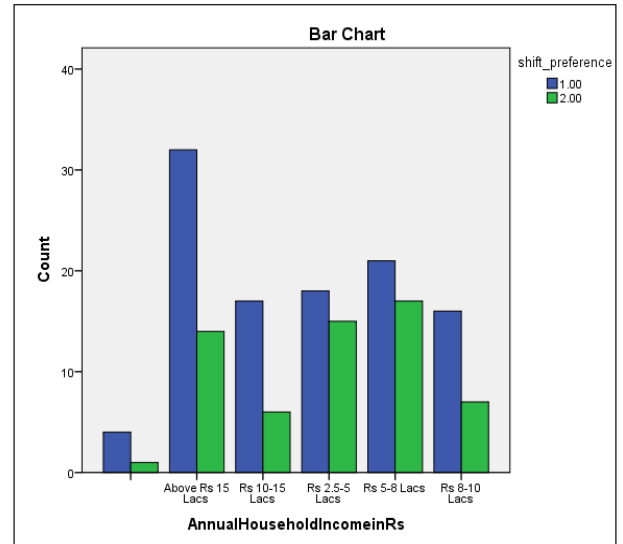
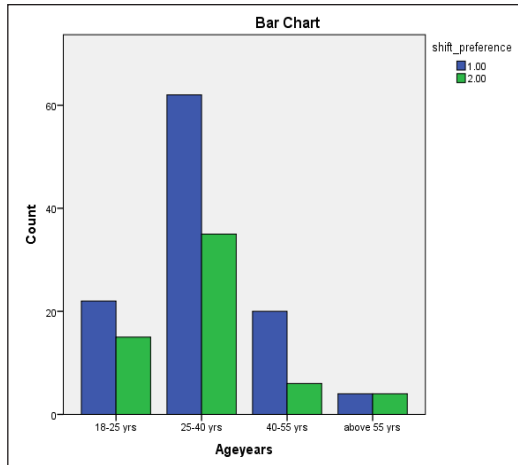
Innovating new business models on an integrated platform combining technology, soft skills and industrial discipline will be a game changer. Up skilling youth for holistic development with certificate or diploma courses in entrepreneurial, managerial and technical skills instilling ecopreneurship. It will identify opportunities for leveraging the indigenous tourism in domestic hinterlands of natural, cultural or historical significance like shivaliks dealing with the menace of migration, inadequate employment opportunities and social issues. Advancing growth opportunities among women and youth through vocational training and mentored programs will bridge the economic and social divide aiding community development. Thereafter dedicated efforts of all stakeholders will put the sector back on the recovery track with a sustainable outlook.

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Appendix:





Safety Measures, Experimenting with Incentives, and Supporting the Community

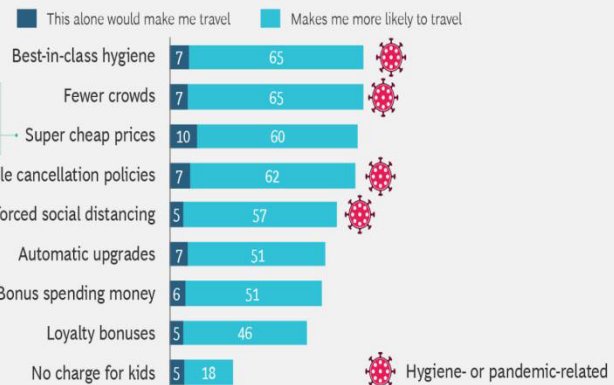
US data (trend indicative of developed markets)

Brand choice: virus safety ranks highly among key value drivers; COVID-19 support also matters

Consumers who ranked the criterion among the top 3 in choosing a brand to travel with (%)



Additional incentives: attention to hygiene, fewer crowds, cheap fares, and flexibility are most likely to encourage travel



Source: BCG COVID-19 Consumer Sentiment Survey, May 8-11, 2020 (N = 2,500-3,000), unweighted, representative within ±3% of census demographics.

Note: Question text: "Next time you travel, what are the top things that you are looking for when deciding what brands (e.g., airlines, hotels, cruises, casinos) to travel/stay with? Please rank up to 3 criteria." and