



Potential Impact of COVID-19 on Indian Tourism and Travel Industry

MAY 7, 2020

chase|india

FOREWORD

Since the first outbreak of the Novel Coronavirus (COVID-19) in China in December, today it has expanded to nearly every corner of the world and has taken a massive toll on the global economy. Almost the entire world is in a synchronized lockdown and the economic cost of the pandemic crisis is accumulating rapidly. With the severe spread of the virus in India since beginning March, the Indian economy is projected to grow at 1.9% (as per the International Monetary Fund) this year, as the lockdown and existing restrictions economic activities is causing more damage than anticipated. In the last five years, tourism in India has been an enabler of economic growth, capable of significantly contributing to the nation's GDP, employment opportunities and infrastructural development. However, the pandemic has had a crippling blow to the travel and tourism industry, bringing it to a staggering halt.

The outbreak has impacted every facet of the tourism industry, although analyzing the tangible loss to the sector is difficult to quantify as the data keeps multiplying with the ongoing restrictive measures and safety concerns. It is not only the worst crisis to hit the industry across geographical segments and almost all tourism verticals - leisure, MICE, cruise, medical, corporate and other niche segments, but also the entire value chain across hotels, travel agents, tour operations and air, land and sea travel.

In the foreseeable future, the industry will continue to grapple with significant low demand, coupled with uncertainty of future bookings which is dependent on multi-layered developments to contain the virus. In this report, we look to bring to you an overview of the impact on the industry and the ancillary sectors, economic stimulus needed to work towards the revival of the sector and how the sector can gradually recover from the current situation in the near term and the possible ways to adjust strategies to prepare for the future.

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INTRODUCTION

1. INTRODUCTION

1.1. About the Virus

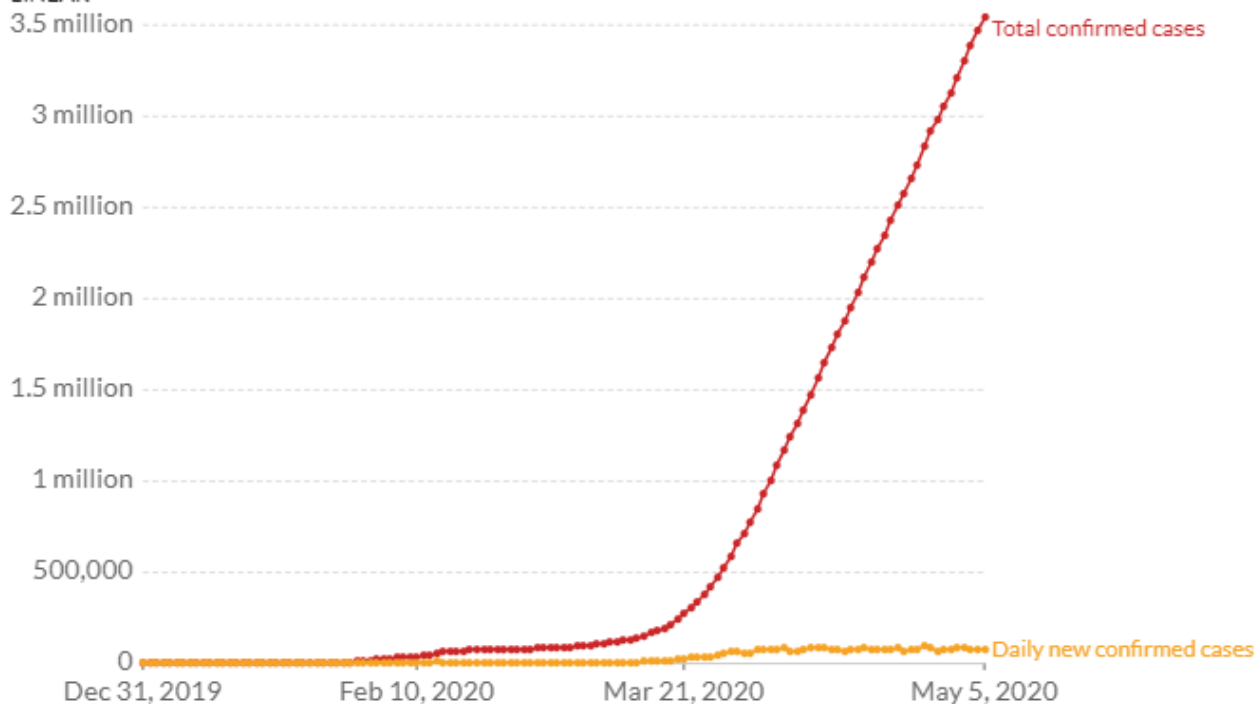
On Dec. 31, 2019, Chinese authorities alerted the World Health Organization of pneumonia cases in Wuhan City, Hubei province, China, with an unknown cause. What started as a mystery disease was first referred to as 2019-nCoV and then named COVID-19. Like other respiratory diseases, COVID-19 spreads through small droplets—saliva or mucus—that an infected person expels when they cough, sneeze, or talk. These droplets can travel three to six feet and remain infectious for anywhere from four to 48 hours, depending on the surface.

In a matter of months, the disease has gone from being localized with the Hubei province to impacting almost every single country in the entire world. As of May 5, there were close to 3.54 million confirmed cases of the disease and 250,000+ resulting fatalities across the globe. The disease has thus far shown an exponential growth curve, and while policy makers scramble to flatten the curve, the measures being taken have had major negative impacts on national economies and brought up the advent of the next global recession.

Total and daily confirmed COVID-19 cases, World

The number of confirmed cases is lower than the number of total cases. The main reason for this is limited testing.

LINEAR



Source: European CDC - Situation Update Worldwide - Last updated 5th May, 11:30 (London time)

CC BY



1.2. Economic Impact of COVID-19

To stop the spread of the virus, governments have sprung into action with unprecedented public-health and economic responses. Throughout the world, social distancing has now become the norm. This has, however, taken a toll on economic activity as people remain bound to their own homes and only essential economic activity taking place. Most recessions are caused by a slowdown in demand, a supply-side shock, or a financial shock. COVID-19 has been an outlier as it has simultaneously created all three at the same time. The impacts have been as follows:

1.2.1. *Supply-side shocks*

- **Disruption in Global Supply Chains:** Decades of deep economic integration have restructured international trade and investment. In modern global value chains, production processes are often spread across dozens of firms operating in multiple countries. When any link in the chain breaks, upstream and downstream suppliers and consumers are impacted too¹. The disruption that initially began with the locking down of Hubei province has now spread globally and has already begun to show the vulnerability of the supply chains. This effect is expected to compound as stockpiles of upstream input materials become dearer.
- **Reduction in Production Capacities:** With lockdowns and social distancing becoming the norm, labor intensive industries have all but temporarily shut down or have limited operations. Economic activity generated from businesses that require human interaction or human presence have been put on hold. Industries such as hospitality have seen a drop in revenue to nil for the foreseeable time being. As a result, aggregate supply has seen a dip across the world.

1.2.2. *Demand-side Trends*

- **Consumption of Essential Goods:** With the world on lockdown, aggregate demand is expected to take a major hit. As people sit in their homes, and countries attempt to allow only movement on essential services and limited non-essential services as per the hotspots and containment zones identified by the Government, demand is expected to slow down.
- **Price Volatility for Essential Goods:** Moreover, the pressure of demand on essential services is likely to cause an increase in retail inflation if governments haven't created reserves and stockpiles on necessary items. This is already being seen in the now volatile market for personal protective gear, N95 masks and other medical equipment. In a recent move, the United States of America was accused of hijacking a shipment of N95 masks scheduled to move towards France from off the tarmac².
- **Increased Consumption of Digital Content:** A study by Comscore³ has shown an increase in the consumption of digital content in the initial days of the lockdown, and this trend is only expected to further strengthen as people remain locked up within their homes. Compared with the week of Feb. 10-16, 2020 visits to websites and mobile apps in the "General News" category increased by 61% in

¹ [The coronavirus will reveal hidden vulnerabilities in complex global supply chains](#): The Brookings Institute, March 2020

² [US hijacking mask shipments in rush for coronavirus protection](#): The Guardian, April 2020.

³ [COVID-19 and its impact on Digital Media Consumption in India](#): Comscore, March 2020

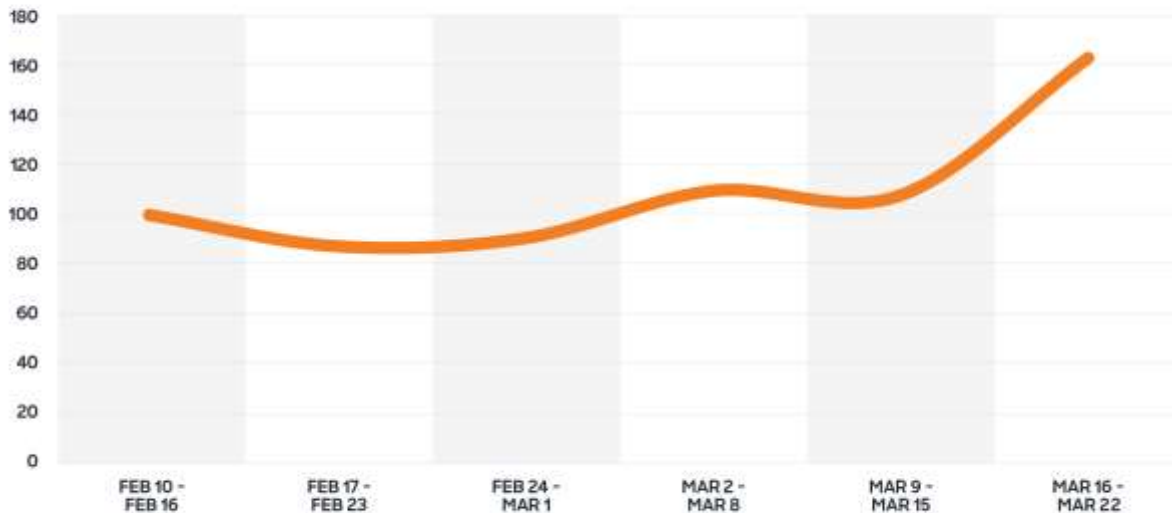
the week of March 16-22, 2020. However, most of the increase occurred recently: compared with the week of March 9-15, 2020, visits went up by 50% during the week of March 16-22, 2020.

1.2.3. Financial shock

- **Liquidity Crunch:** In addition to creating a simultaneous demand and supply shock, COVID-19 has also put pressure on the already strained financial system across the globe. Across the board, central banks have used all the tools in the monetary policy arsenal to tackle the problem. Rate-cuts and quantitative easing have become the norm and are expected to go on for the near future.
- **Large-Scale Default:** While Central Banks have requested banks in their territories to start putting moratoriums on retail loans, countries have begun defaulting on loans owed to multi-lateral agencies. For the third time in its history, Argentina has defaulted on an IMF loan. An estimate by economists Pierre-Oliver Gourinchas and Chang-Tai Hsieh has indicated that a one-year debt moratorium could free upwards of USD 1 trillion, or 3.3% of low- and middle- income countries' combined income might be necessary⁴.

General News Sites: Visit Index

WEEK OF FEB 10-16 = 100



comscore

Source: Comscore Media Matrix, Custom Reporting Index, Feb 2020 - Mar 2020

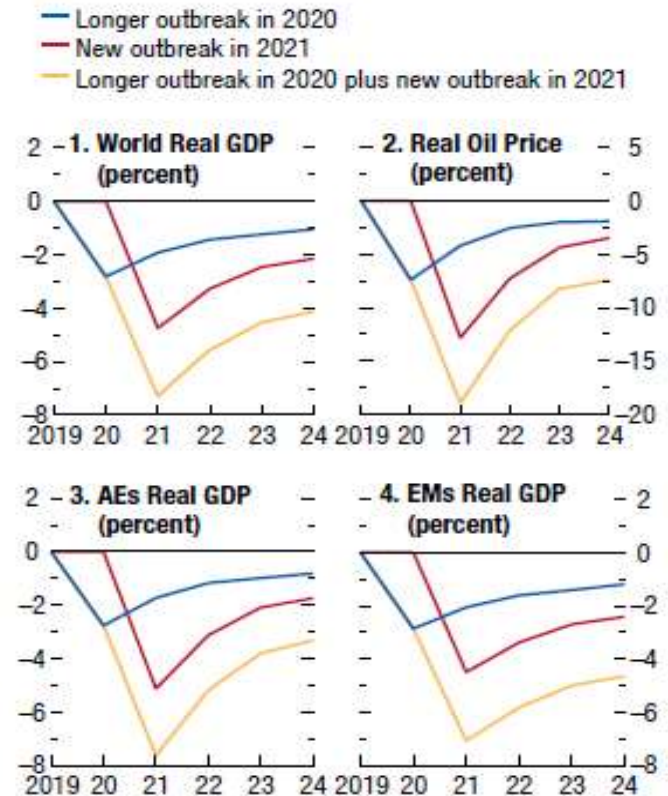
⁴ [The COVID-19 Default Time Bomb](#): Project Syndicate, April 2020

1.3. Global Economic Projections

By now, most economists are predicting that the spread of the virus is inevitably going to cause the next recession. Just three months ago, the IMF was predicting that the global economy would grow by 3.3% this year. However, in its recently released World Economic Outlook⁵, the multilateral organization has now projected that the global economy will contract by up to 3 percent.

- The organization has also created three likely outcomes based on the effectiveness of the policy response in curbing the spread of COVID-19.
- The first alternative (in blue) estimates the impact of the fight against the spread of the virus in 2020, taking roughly 50 percent longer than the assumed baseline.
- The second alternative (in red) considers the impact of a second, but milder, resurgence of the disease occurring in 2021.
- The third alternative (in orange) is a worst-case scenario that estimates the potential impact if the present outbreak takes longer to curb in 2020 and is followed up by another outbreak in 2021.

Scenario Figure 1. Alternative Evolutions in the Fight against COVID-19
(Deviation from baseline)



Source: McKinsey & Co

The dips in growth rates across advanced economics and emerging markets take into consideration not only the supply-shock and demand slowdown, but also the corresponding fiscal stimuli provided by governments to tackle the situation. While all the IMF recovery curves project a V-shape recovery, they also put the global economy in the red for the next 2-3 years. In contrast, in its COVID-19: Briefing Note, McKinsey & Company⁶ has predicted that the recovery curve will be dependent on two major factors:

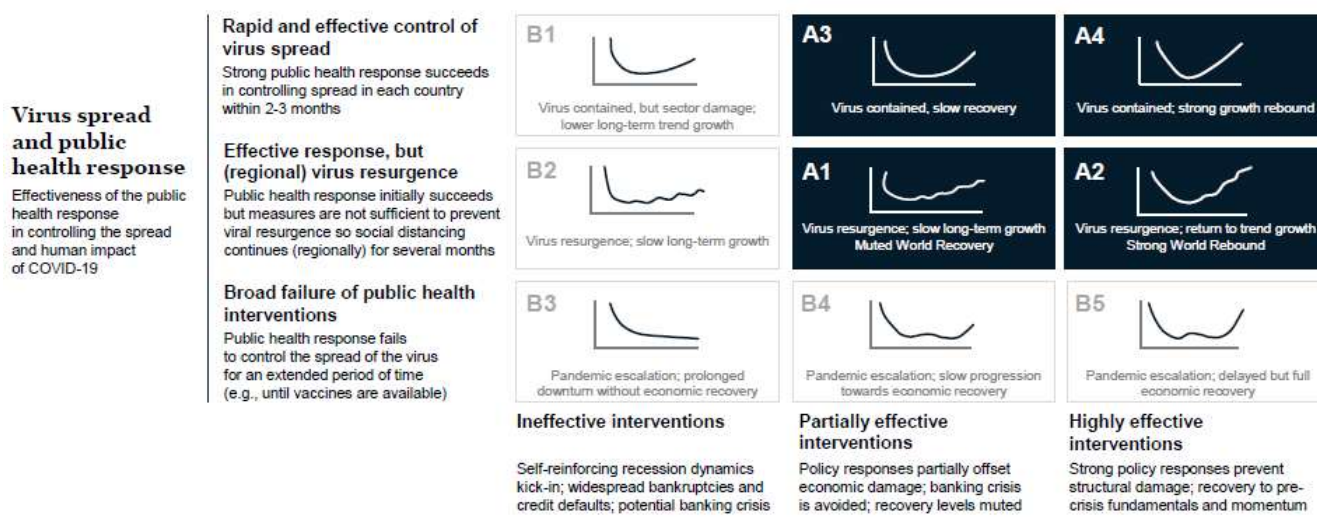
- **Spread of the Virus and Public-Health Response:** In the case that there is a robust curb of the spread of the virus, the shock will be short-term and the recovery will be quick as it would be a small disruption but not a break-down of supply chains and demand. However, if the public-health

⁵ World Economic Outlook: The Great Lockdown: International Monetary Fund, April 2020

⁶ Safeguarding our lives and our livelihoods: The imperative of our time: McKinsey & Company, March 2020

response is ineffective, long lockdowns will hit both supply and demand, and recovery will rely on economic stimuli alone.

- **Effectiveness of Economic Policy:** While economic stimulus will not be able to impact the longevity during this period, governments would need to ensure continuity of the financial sector and increase public and private debt to ensure that the uptick once a vaccine is found is robust. An ineffective economic policy will only see a bottoming by the virus, while an effective solution will result in a steeper upward curve after action is taken.



Knock-on effects and economic policy response

Speed and strength of recovery depends on whether policy moves can mitigate self-reinforcing recessionary dynamics (e.g., corporate defaults, credit crunch)

Source: McKinsey & Co

1.4. Indian Economy

In India, the first detected case of COVID-19 was on January 30; one of the passengers airlifted from Wuhan by the government. While the first few inbound travelers were isolated because they were put under the strict quarantine, the transmission escalated in the month of March, after several cases were reported all over the country, most of which were linked to people with a travel history to affected countries. On 10 March, the total cases reached 50. On 12 March, a 76-year-old man who had returned from Saudi Arabia became the first victim of the virus in the country. The total cases had already crossed 48,000 by May 5.

Coming into this pandemic, India was already reeling with a slowing growth, a stressed financial sector and creeping inflation. Towards the end of last year, prior to advent of COVID-19, the former Prime Minister Manmohan Singh had already mentioned that India was heading towards a state of stagflation. The pandemic has added layers of crises to this situation through the ongoing lockdown and migration of labor back to the villages. In toto, as per a report in Ideas for India⁷, the Indian economy has the following problems to deal with:

⁷ Covid-19: Macroeconomic implications for India⁷: Ideas for India, March 2020

-
- **Informal Sector Challenges:** The informal sector depends crucially on people's daily demand. With a large chunk of the potential customers of the informal sector staying at home right now and withdrawing from non-essential expenditures, the survival of informal sector units will become questionable with every passing day that the health crisis and the associated lockdown drags on.
 - **Corporate Sector Stress:** Firms in the formal sector will struggle to survive as they will have fixed outgoings, but incoming revenue is likely to be staggered. This will prove to be a challenge for firms with leverage on their balance sheets.
 - **Broken Banking Sector:** Coming into the crisis, India was grappling with high NPAs and just before the lockdowns, one of the largest Indian banks – Yes Bank, had to be taken over by a government bank. The corporate sector stress, especially for leveraged firms, is likely to roll over onto the financial sector as companies will not be able to pay back loans, leading to higher volumes of NPAs.
 - **Limited Fiscal Deficit Leeway:** Like the rest of the world, India will have limited opportunity to increase its fiscal deficit, which will be a necessity for recovery. As the crisis has started, the government has already announced a package of USD 22 billion towards tiding over the most vulnerable during the lockdown.
 - **Reduced Growth Projections:** Over the course of the last few weeks, the cracks in the Indian economy have begun to start showing. Economists, rating agencies and banks have already started recasting their global and Indian forecasts. While economists had earlier projected that the economy would grow at about 5% in this financial year, they are now predicting a contraction of the GDP from between 4.7% to 0.1% for the coming financial year due to the prolonged lockdown⁸.
 - **Increasing Unemployment:** As per the unemployment tracker survey of Centre for Monitoring of Indian Economy (CMIE), the organization estimates that only 27.7 per cent of the working-age population (103 crore) was employed in the week after lockdown began. According to the employment calculation method of the organization, within two weeks, the number of gainfully employed has come down from 40.4 crore to 28.5 crore, a drop of 11.9 crore. Given that aggregate demand is expected to weaken, this number may increase in the short-term before stabilizing⁹.

⁸ [India's economy may see first contraction in 40 years on lockdown extension](#): Business Standard, April 2020

⁹ [India lost more jobs due to coronavirus lockdown than US did during Depression](#): ThePrint, April 2020

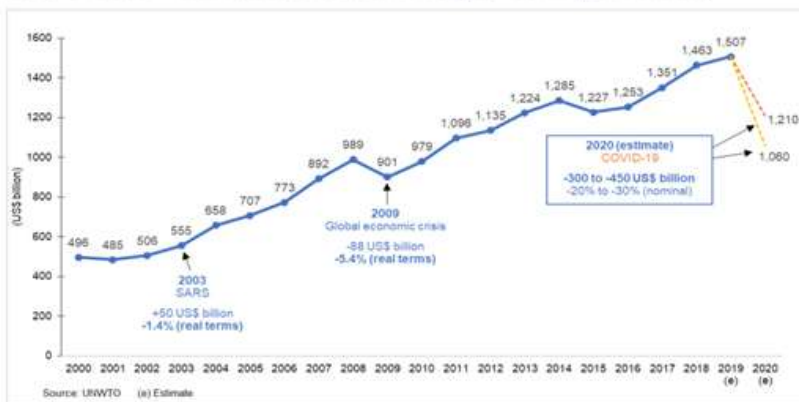


GLOBAL TOURISM FORECASTS

2. GLOBAL TOURISM FORECASTS

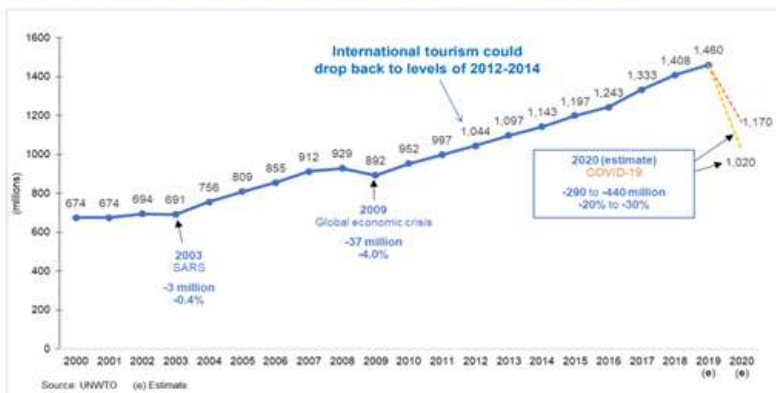
The United Nations World Tourism Organization (UNWTO) estimates international tourist arrivals could decline by 20% to 30% in 2020. This would translate into a loss of 300 to 450 US\$ billion in international tourism receipts (exports) – almost one third of the US\$ 1.5 trillion generated globally in the worst-case scenario. The UN World Tourism Organization counted 1.4 billion international tourist arrivals in 2018, and, well before this crisis, had predicted 1.8 billion arrivals by 2030. With virtually all travel halted, recovery will take time This crisis is likely to impact about 290-440 Million International Tourist Arrival.

2020 forecast - international tourism receipts, world (US\$ billion)



The aftermath of 9/11 in 2001 and the SARS virus in 2003 had tried to deter the travel industry. Although the former led to a 50% fall in the air and hotel bookings, the after-effects of later were experienced worldwide for six months. As per World Bank Data, global tourism incurred losses between USD 30-50 billion Despite the momentary damage done by SARS in 2003, the travel and tourism rose to register immense growth by 2006. The top 4 online travel portals at the time recorded considerable growth in the booking revenue for the year 2007.

2020 forecast - international tourist arrivals, world (millions)

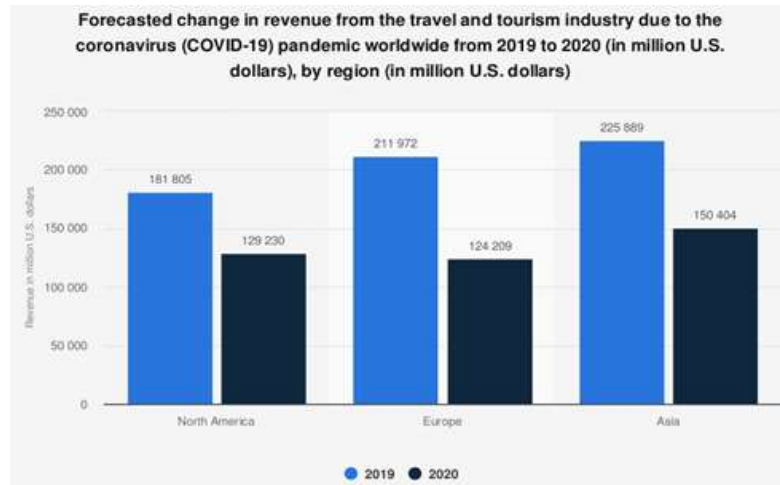


The World Travel and Tourism Council has warned the COVID-19 pandemic could cut 50 million jobs worldwide, around 30 million is Asia in the travel and tourism industry. A German online portal for Statistics, statista.com in its analysis has stated result of the coronavirus (COVID-19) pandemic, the global travel and tourism market is predicted to see a loss of 75.2 million jobs worldwide in 2020. The tourism industry currently accounts for 10% of global GDP. Once the outbreak is over, it could take up to 10 months for the industry to recover.

2.1. Region-wise

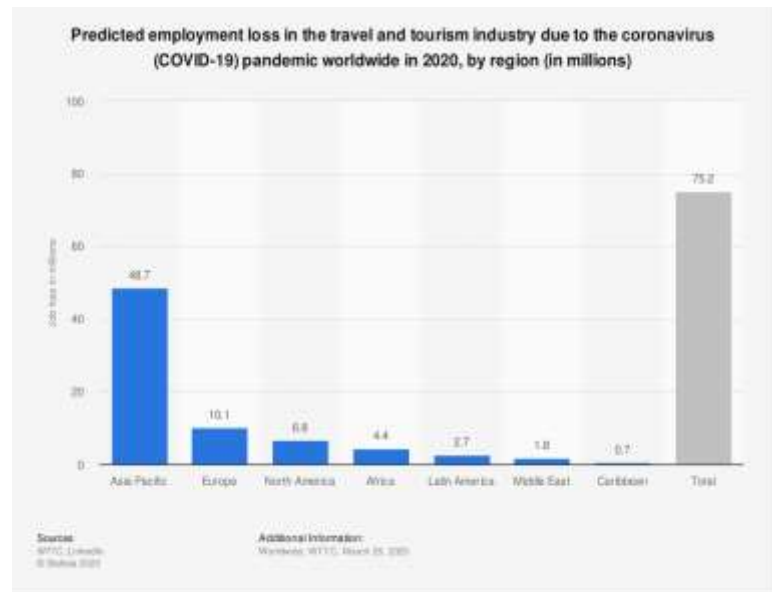
2.1.1. Revenue Losses

According to the Mobility Market Outlook on COVID-19, the revenue for the travel and tourism industry in Europe will be the most affected by the pandemic, decreasing from 211.97 billion U.S. dollars in 2019 to roughly 124 billion U.S. dollars in 2020, followed by Asia which predicted to be down to 150.40 Billion Dollars from 225.89 Billion dollars. North America is expected to be down from 181.80 billion dollars to 129.30 billion dollars.



2.1.2. Job Losses

The region that is supposed to see the biggest loss from COVID-19 is the Asia Pacific region, losing approximately 48.7 million jobs, while Europe is forecast to be the second hardest hit with a forecasted employment drop of 10.1 million.





INDIA: IMPACT ON TOURISM AND ALLIED SECTORS

3. INDIA: IMPACT ON TOURISM AND ALLIED SECTORS

3.1. Overview

Over **87 million** people were employed in the tourism industry in 2018-19, according to the ministry of tourism's annual report for 2019-20. The sector accounts for **12.75%** of employment, 5.56% of it direct and 7.19% indirect. While the tourism sector has struggled even before the pandemic, it remains, according to the Economic Survey 2019-'20, "a major engine of growth, contributing to [gross domestic product] and foreign exchange earnings". The share of tourism in India's GDP was 5.06% in 2016-'17, down from 5.81% from 2014-'15, according to the tourism ministry's latest annual report cited above. Apart from central features of the tourism industry such as travel agencies, guides, hotels, and restaurants, there are a lot of peripheral activities that garner their livelihood from it; for example, cottage industries associated with textiles and local handicrafts¹⁰.

"The Indian tourism and hospitality industry is staring at a potential job loss of around **38 million**, which is 70% of the total workforce," due to COVID-19, a report by KPMG.¹¹ Nine million jobs--six times the population of Goa--in the travel and tourism sector are at risk in India, according to the World Travel and Tourism Council (WTTC). Ministry of Tourism said the government is considering helping the sector with soft loans, working capital and deferment on loan repayments.

The ministry itself, in a presentation to a parliamentary panel on transport and tourism in March had pegged the losses at ₹5 lakh crore, quoting industry estimates. According to a report from CII branded hotel groups are set to lose as much as ₹1.10 lakh crore, online travel agencies ₹4,312 crore, tour operators (inbound and domestic) ₹25,000 crore, adventure tour operators nearly ₹19,000 crore and cruise tourism ₹419 crore.

Credit rating agency ICRA downgraded the Indian hospitality sector from stable to negative outlook and said ICRA expects the travel and tourism industry to witness one of the longest tail periods of impact, potentially running into multiple quarters, following the COVID-19 wave.

3.1.1. **Short-Medium Term Forecast**

Incumbent upon how well the spread of infection has been contained, even with hopeful estimates the restarting of the tourism sector seems unlikely till September – October. People would be conservative in planning any immediate trips even within domestic circuits. CII in its sectoral analysis report for tourism states the following - "*With the shut down and slow down expected to last for a period stretching from February till October, 2020 as the six months off season is also going to commence shortly after a compromised winter and spring season, the industry will see cash flows only beginning to improve in November 2020 and perhaps get to normal levels by end of 2020*"¹² ICRA expects the recovery cycle to start with individual business travellers, followed by group and leisure travel. Foreign travel will revive

¹⁰ [Job Loss Looms Over Millions As COVID-19 Brings Tourism To A Standstill](#), India Spend, April 2020

¹¹ [Job Loss Looms Over Millions As COVID-19 Brings Tourism To A Standstill](#), India Spend, April 2020

¹² [CII COVID 19 Impact on the Industry and Economy](#), CII, March 2020

with a significant lag. Overall, the impact on the Indian travel and tourism sector would be a decline in occupancies, MICE activity and consequently rate pressures. The industry will have to tap the potential of the domestic markets to get moving.

3.1.2. Long Term Forecast

The industry has been served a severe shock. The loss of working capital felt by most of the industry along with tightened liquidity will lead to massive job losses and in many cases bankruptcies and defaults on properties especially in the MSME scale. The capital investment in the sector will take a hit as the government would have to initially concentrate on granting immediate relief to the losses faced by the industry. The government in the process too, will have to forego considerable amount of revenue if it extends supports in form of tax holidays and salary corpuses. The overall impact of COVID-19 on the already stressed economy would make it difficult for the government to meet the needs of all quarters of the tourism industry.

The Indian economy is currently staring at the collapse of the informal sector. With a large chunk of the potential customers of the informal sector staying at home right now and withdrawing from non-essential expenditures, the survival of informal sector units will become questionable with every passing day that the health crisis and the associated lockdown drags on. Add to that the burgeoning corporate sector stress, the over leveraged banking sector a limited fiscal deficit leeway which may prevent the government from excessive borrowing and lowered growth projections. These factors will play a huge role in how to what extent the government intervenes to facilitate the growth of the tourism sector in the next couple of years.

3.2. Travel Verticals

3.2.1. Medical Value Travel

Medical value travel, which includes patients travelling to India for treatment both in modern medicine and AAYUSH. India has become a hub for medical tourism, especially for neighboring countries, middle east, central Asia and Africa. The number of people coming to India for medical treatment has grown annually at about 55%. According to Ministry of Tourism, the medical tourism space was valued at around \$3 billion (US\$) in 2015 and at \$9 billion in 2020.¹³ Industry experts peg the loss to the industry due to COVID-19 at about \$ 2.5 billion if the situation persists for the next six months. Considering the fact that with highly restrictive travel regimes that are expected to be in place in the coming few months, the industry will take at least a year to show signs of recovery.

3.2.2. MICE Tourism

The estimated market size of MICE in India is ₹37,576 crores in which nearly 60% comes from MIC i.e. meeting, incentive and conference. 65% of these are B2B events¹⁴. The estimated market size from Events is in the tune of ₹4,800 crores from space rental but it has multiplier impact to economy in terms of accommodation, traveling, communication and advertisement, remuneration to skilled work force etc. With most international and domestic airlines having trimmed or discontinued their operations, a halt on economic activities and a structural shift towards curbing of non-essential travel for both international and

¹³ [COVID-19 Crisis Will Open up Opportunities for India's Pharma Industry that Must Be Seized](#), The Wire, April 2020

¹⁴ [Final Report On MICE Market In India](#), Ministry of Tourism, June 2019

domestic travel MICE tourism is likely to be one of the hardest hit and one with the most sluggish growth rate.

3.2.3. Cruise Tourism

As recently as January 2020, Prime Minister Narendra Modi announced an integrated waterway policy, which aims to revamp the country's current port infrastructure, undertake riverfront development, and increase the number of cruise ships to 1,000, from the existing around 150¹⁵. According to experts in the field, the potential of the industry in the country is up to ₹35,000 crore (\$4.9 billion) revenue a year. The growth rate of the country is at 35%.

Initiatives taken by the government in the sphere have led to a nearly four-fold jump in cruise callings on Indian ports between 2017 and 2019. The total cruise callings on five ports including Chennai, Cochin, Mumbai, Mangalore and Mormugao were 138 ships carrying a total of 1.76 lakh passengers in fiscal 2017-18. This number increased to 285 callings in FY19 and was projected to rise to 593 cruise traffic in FY20¹⁶. In Mumbai, the Mumbai Port Trust along with private partners, is investing about ₹353 crore in a new terminal to facilitate increasing numbers.

Given these figures, India was on the path of becoming a prime location for cruises to come, especially given its long coast line and geopolitical location. However, as COVID-19 has swept the world, it has ended near-term prospects of revival of the industry.

The emergence of COVID-19 and its links to cruise tourism gained ascendancy with the stranding of the Diamond Princess off the coast of Yokohama, Japan. More recently, in Australia, the equally stricken Ruby Princess exemplified the rapidly developing perception of cruise ships as petri dishes for the spread of coronavirus. Given this perception change and the state of the industry, cruise tourism is expected to remain muted till the end of COVID-19.

That being said, forward bookings into 2021 show considerable increases over 2019 levels, suggesting that the sector's ability to bounce back is almost assured¹⁷ and that while demand might remain flat for the next year, thereafter it would pick up to even greater levels. At this point, based on the situation in the future, India could be primed to become a preferred destination for travelers. Already, coastal and tourist hotspots such as Goa have seen their COVID-19 figures fall down to nil levels as of May 4, after a spike in the month of March and April.

3.2.4. Religious Tourism

The former Union Minister for Tourism K J Alphons once stated in an interview that majority of India's domestic tourism is centered around religious tourism¹⁸. He quoted government estimates that noted nearly 60 percent of domestic tourism in India is religious based. The number of domestic tourist visits in 2017 stood at about 1.8 billion, up about 12 percent from the over 1.6 billion in the previous year; which translated to more than a billion religious tourists a year.

Most religious tourism involves large-scale congregations on specific days, for festivals or during a specific period of the year. Given that social distancing is also likely to be on people's minds, one can

¹⁵ [It's time India takes its cruise tourism seriously](#): Quartz, February 14, 2020

¹⁶ [India clocks four-fold jump in last two years](#): Financial Express, November 2019

¹⁷ [Not drowning, waving: Where to for cruise tourism post-COVID-19?](#): Lens, Monash Education, April 2020

¹⁸ [Indian government plans to promote religious tourism](#): Matters India, March 2018

expect to see a significant drop. Administrative directions have already been put in place on mass gathering across states: there have been cases detected in Amritsar, closure of the Tirupati, Vaishno Devi and Shirdi temples, and calling off of Friday prayers at the Bada Imambada in Lucknow.

Most religious destinations saw a sharp decline in numbers by mid-March itself: Puri, Ajmer, Coimbatore, Govardhan, Hospet, Kartarpur Saheb all sputtered to a close as the faithful kept away. On Akshay Tritiya, there were zero crowds at Kashi Vishwanath. Globally too, pictures of Mecca circulating on the net without any Hajjis, shows God too is headed for a hiatus.

In a video conference with the Prime Minister, the Chief Minister of Uttarakhand raised the issue of the devastating impact the novel coronavirus has on the tourism sector, specifically with regard to religious tourism in the state¹⁹.

3.3. Sub-sectoral Impact

3.3.1. Aviation Sector

Being intrinsically connected with the tourism and facing an already overleveraged sector dragged by profitability, debt, serviceability of grounded aircrafts, Aviation sector globally as well as in India has taken a big hit. The recent travel bans imposed by many countries to restrict the transmission of the virus had resulted in a sharp reduction in the number of flights that were operating internationally. This slump in the number of flights internationally showcases as to why a sudden and quick recovery in aviation is not possible in the current scenario. Travel can only resume when the virus is contained worldwide, and the governments think it is safe again to reopen the borders. According to IATA, the passenger airlines are set to lose \$252 billion for the year 2020. This was significantly higher than the earlier prediction on the 5th of March which was valued at a \$113 billion. Two weeks before this estimation, IATA pegged the losses of the airline industry at a mere \$29 billion. The value of \$252 billion is 44% less revenue as compared to the previous year of 2019.

In India, foreign tourist arrivals were 96,69,633 during January-November 2019 which was a three percent growth from 2018.²⁰ With India suspending international travel and no clear timelines to officially lift this ban the aviation industry will continue to post losses. Even post the lockdown, it is expected that international travel would be limited to essential travel only till the fear of the virus subsides. Domestically, the air traffic in India was 14.41 crore.²¹ Due to the complete lockdown and the earlier travel restrictions imposed, it is projected that till the 1st quarter financial year of 2021, Indian aviation could lose up to \$3-\$3.6 billion and an estimated of 575,000 jobs to get impacted.

3.3.2. Indian Railways

Indian Railways is the biggest lifeline of domestic tourism in the country with network spread over 1,23,236 km, with 13,452 passenger trains and 9,141 freight trains from 7,349 stations plying 23 million travelers daily. Nationwide lockdown to curb the spread of the deadly novel coronavirus has led railways to losses totaling ₹12,500 crore. It is set to lose ₹6,500 crore in revenue earned from ticket sales and nearly another ₹6,000 crore in revenue earned from plying freight services²². Even if the lockdown is

¹⁹ [Views expressed by chief ministers after PM's meet on COVID-19](#): Outlook, April 2020

²⁰ [Foreign tourist arrivals in India rose 3% in Jan-Nov 2019](#): LiveMint, January 2020

²¹ [Domestic air passenger traffic grows by just 3.74% in 2019 compared to 18.6% in 2018](#): Economic Times, January 2020

²² [Railways to lose over Rs 12,000 crore in revenue earnings due to COVID-19 crisis](#): Money Control, April 16, 2020

lifted on May 3, the Railways will have to resume services in a staggered, phased manner, meaning it will take the country's biggest employer months before it recovers its losses. Unhindered and smooth functioning of railways would be extremely important for the revival of the tourism sector and vice versa.

3.3.3. Accommodation and Lodging Sector

Hospitality consulting firm Hotelivate in its report has stated that in the best case scenario' of the viruses impact only being devastating for the next two to three months, the estimates are that the weighted impact of this situation is likely to erode the blended nationwide occupancy (in calendar year 2020) by about 18% to 20%. Reduced room revenue, coupled with erosion in both restaurant demand and MICE business, are very likely to have a cascading effect on non-room revenue for hotels across India as well. It is therefore estimated that the overall loss of total revenue for the ~ 140,000 branded organised hotel rooms across the nation will be anywhere between US\$1.3 billion to US\$1.55 billion. This amounts to a 27% to 32% erosion in the overall revenue as compared to last year. Moreover, given that these 140,000 rooms represent only about 5% of the total lodging sector in India (95% of it being B&Bs, Guest Houses, Unbranded & Unorganized Supply), it is our estimate that there is likely to be an additional loss of anywhere between US\$4.2 billion to US\$4.7 billion in total revenue across the alternate accommodation industry.²³

3.3.4. Travel MSMEs

With almost no tourism in sight for atleast the next two quarters, the biggest brunt would be borne by the small and medium enterprises in the tourism industry. These players often operate on wafer thin margins and mostly are last mile service providers. This section is the most vulnerable to hardships due to tourism shut down. According to the Federation of Associations in Indian Tourism & Hospitality (FAITH), over 95 percent MSMEs of 53,000 travel agents, 115,000 tour operators, 15,000 adventure, 911,000 tourist transporters are facing the heat due to the lack of cash flows.²⁴

3.3.5. Restaurants and F&B

With lockdowns in place across the country, after tourism, the sector has been worst hit has been the F&B industry. With zero occupancy in restaurants and large fixed costs of rent, utility and salaries, a large number of players have already begun to shut shop and a huge number are expected to follow suit in the coming days. According to the National Restaurant Association of India (NRAI), the restaurant industry employs over seven million people and has an annual turnover of ₹4 lakh crores. The NRAI, in a statement, said that they are expecting 500,000 members to lose up to ₹80,000 crore in 2020.²⁵

The National Restaurant Association of India (NRAI), which is the largest body of restaurants in the country has written to the government and sought a relief package for the industry. In a letter to the NITI Aayog CEO Amitabh Kant, NRAI president Anurag Katriar said that despite honest intent, businesses do not have resources to pay salaries to employees. NRAI has suggested an unemployment pay cover to all employees under Employees' State Insurance Corporation Act till the end of lockdown, and 50% till March 2021 — which they said can be a mix of cash and food grains. The association estimates that

²³ [COVID-19 & Its Impact on The Indian Hotel Industry](#): Hotelivate, March 2020

²⁴ [Tourism & hospitality on brink of collapse, appeals for relief package](#): Money Control, April 23, 2020

²⁵ [If lockdown extends, nearly 50% of the restaurants across the country may shut down](#): Times Travel, April 2020

business will take anywhere between six and 12 months to gain any respectable traction in the post-COVID-19 era.²⁶

The association also recommended that the benefit of provident fund (PF) contribution scheme should be extended wherein the state bears the PF contribution of both employees and the employers, to companies employing up to 1,000 persons.

²⁶ [NRAI seeks relief package from government](#): Verdict Foodservice, April 2020



INDUSTRY REACTION & RESPONSE

4. INDUSTRY REACTION & RESPONSE

4.1. Measures taken by Hotels / Accommodation Sector to Survive COVID Impact

Owing to the virus outbreak, and resultant containment measures by the Central and State governments, almost all segments of tourism have been severely impacted. As travel restrictions intensified and continue to be in place, tourism players adopted various measures to cope with the impact

- **Pay Cuts:** Travel companies and hotel chains have resorted to pay cuts at various levels and voluntary cuts being taken by top management. OTA platforms like MMT²⁷ announced that co-founders will be taking zero salaries from April and 50% pay cut for senior leadership team.
- **Layoffs and Leave Without Pay:** Layoffs in the sector are inevitable. Oyo²⁸ announced pay cuts by 25% effective for the April-July 2020 for all employees and 'leave with limited benefits' options for four months until August 2020. Fareportal, a US based travel firm has sacked around 500 employees²⁹ in India
- **Paid Voluntary Resignation Scheme (PVRS):** Small budget chain Treebo Hotels launched a PVRS scheme³⁰ that allows employees to resign from their role at the company, get the notice period waived off, and get one month's salary, subject to a minimum of ₹30,000 pre-tax in advance
- **Fixed cost rationalization:** As fixed cost accounts for 60-70% of the total costs for hotel players, they have adopted a several measures such as termination of contractual labor (accounting for 20-30% of the total employee mix), requesting permanent employees to avail balance paid leave, requesting 3-month waivers for annual maintenance contracts (AMCs)/fees/charges for activities that are fixed in nature, postponing negotiations for AMCs (usually due in March)

4.2. Industry's Support / Assistance to Help Fight COVID-19 in India

4.2.1. To Government and Community

- **Accommodation to Medical Practitioners:**
 - Hotel chains and travel companies have been offering accommodation free or at subsidized rates for quarantine to those who have returned from abroad as isolation wards or to the medical fraternity. OTA platforms such as Yatra, Make My Trip and OYO and hotel chains such as The Indian Hotels Company (Taj group), Hyatt and Marriot launched such initiatives across the country

²⁷ ["Indian Founders, CEOs Sacrifice Pay To Save The Business"](#): Inc42, April 2, 2020

²⁸ ["Oyo announces pay cuts, leave with limited benefits options for India staff"](#): Economic Times, April 23, 2020

²⁹ ["Several Tech Startups Sack Employees Due to COVID-19 Lockdown"](#): Gadgets 360, April 13, 2020

³⁰ ["Paid Voluntary Resignation Scheme in Offing for Employees"](#): Business World, April 8, 2020

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- Federation of Hotel & Restaurant Associations of India through member hotels, offered the government access to over 45,000 hotel rooms from across India, in the wake of the coronavirus lockdown
 - **Food and Supply Donations for Vulnerable Communities:**
 - Distribution of meals and food packets to people such as migrant workers amid the lockdown. Lalit Hospitality Group supporting the Delhi Government's initiative of feeding those in need by donating flour and vegetables sourced from their own gardens to the Delhi Urban Shelter Improvement Board (DUSIB). Furthermore, they are delivering food supplies to local authorities
 - The Hotel and Restaurant Association of Eastern India (HRAEI) initiated dialogue with the state government for assisting them in distributing dry food items like bread, banana and puffed rice to the destitute and elderly people
 - ITC Hotels has been food distribution across cities based on the requirements of the local administration as well as hospitals – In Delhi, they have been providing meals for distribution to migrant workers; in Bengaluru, lending support with food packets to Municipal Corporation; in Mumbai delivering meals to doctors
 - Radisson Hotel Group, are collectively reaching out to nearly 20,000 beneficiaries per day with food and food supplies and have contributed ₹1 crore so far to various state relief funds and Prime Minister's relief fund
 - The Park Hotels has launched a initiative, #THEParkHeartofHope, a neighbourhood service initiative across their hotels, wherein anybody especially the senior citizens can call for any assistance, be it groceries, medicines or food

4.2.2. For Travelers/ Tourists

- **Waiver of Flight Cancellation:** OTA platforms such as Yatra/ MMT announced a waiver on all flight cancellation or processing fee for rescheduling or cancellation of domestic and international flights till April 30
- **Accommodations at Subsidized Rates:** Under the Disaster Management Act, hotels accommodated asymptomatic people who needed to be quarantined after their arrival from destinations that have been highly-affected by Covid-19 in cities like Lemon Tree Hotels in Delhi
- **Supporting Stranded Tourists:** Players like OYO has taken a series of measures to accommodate foreign nationals stranded in the country by connecting with over 15 diplomatic missions in India and has already helped stranded foreign tourists from the US, Brazil, Belgium, Portugal, Australia, Chile, Argentina and Indonesia in availing accommodation
- **Training of Employees:** For current minimal operations and to prepare for when travel eases, some chains have deployed training sessions for employees. Lemon Tree has put in place certain sensitization and training measures for team members on all cautionary and preventive measures

4.3. Relief Measures Demanded by Industry Stakeholders

Federation of Associations in Indian Tourism & Hospitality (FAITH), CII and KPMG, Indian Association of Tour Operators have made the following broad recommendations.

4.3.1. Short-Term Recommendations

- **Moratorium on EMIs:** 12-month moratorium on EMIs of principle and interest payments on loans and working capital from Financial Institutions (both banking & non-banking). Additionally, doubling of the working capital limits and on interest free & collateral free terms.
- **Deferment of Statutory Dues:** To prevent insolvency, a deferment for twelve months of all statutory dues whether GST, Advance Tax payments, PF, ESIC, customs duties at the Central Government level or at any state government level the excise fees, levies, taxes, power & water charges, bank guarantees & security deposits and deferment of all renewals, across the tourism, travel, hospitality & aviation industry (CII has recommended a complete GST tax holiday for 12 months).
- **Establish Grand Fund:** To set up a support fund for twelve months on the lines of MNREGA to support basic salaries with 'direct transfer' to affected tourism employees.
- **Deferment of Insurance Premium:** Deferment of increase in any insurance premium for a period of 12 months. For example, for standard fire and special perils rate for fire, loss or profits.
- **Weighted Exemption:** A 200% weighted exemption for twelve months on expenses to Indian corporates to hold exhibitions, conferences and incentive trips in India.
- **TCS exemption under GST:** Travel agents are liable to collect TCS @ 1% under GST while remitting payments to airlines and hotels. TCS compliance contributes significantly towards working capital needs of the OTA sector and would also impact airline and hospitality sector if a tax holiday under GST is considered for them. Therefore, a TCS exemption for OTAs in line with GST holiday granted to airline and hospitality sector. Estimated TCS liability for entire OTA sector would be INR 460 crore
- **TDS by Travel agents/ Tour Operators/OTAs under Income Tax:** Budget 2020 proposed a new TDS levy similar to TCS under GST law, whereby travel agents/tour operators/ OTAs are required to withhold 1%/5% TDS while remitting payments to airlines, hotels etc. Keeping in with the fact that entire industry is heading towards a loss year, the proposed provision should be rolled back.
- **TCS on sale of Overseas Tour Packages:** The proposed TCS on sale of overseas packages in the Finance Bill 2020 is detrimental to tourism business in India. The proposed TCS will not only increase the cost of packages sold by Indian tour operators, it will also shift all sales of outbound tourism to overseas suppliers denying the government all Income tax and GST revenue. Therefore, in order to allow domestic tour operators a level playing field and a chance to revive their business, it is recommended that proposed TCS should be rolled back.
- **Prioritize Credit Line:** All tourism entities - airlines and hospitality – must be treated as priority sector lending
- **Creation of Tourism COVID-19 Relief Fund:** A support fund 'Tourism COVID 19 Relief fund' to be set up by RBI or Ministry of Finance or Tourism to support salaries and establishment costs. It should be either in the form of non-collateral interest free loan to Tourism corporates for repayment of the principle within 5- 10 years.

- **Creation of National Tourism Task Force:** A national tourism task force of all relevant ministries of the Central Government along with ministry of tourism and chief secretaries of State governments and industry stakeholders to be created. This should be with legislative powers on the lines of GST council for state wise standardised tourism response.

4.3.2. Long-Term Recommendations

- **SEIS for 2020-25:** - During off season most of the tourism infrastructure is underutilized. It will give huge benefit if additional incentives are offered by the Government during April to September for SEIS (Service Exports From India Scheme) percentage may be increased to 15% during off season i.e. April to September and 10% during season i.e. during October to March. In both the cases, this will help offer competitive packages comparing to our neighbouring countries and lure them to visit India in big numbers.
- **Deemed Exporters Status to Tourism Industry:** - Tourism Industry be given status of deemed exporters based on their foreign exchange earnings and all benefits that are given to exporters of goods and IT industry should be given to tourism industry including exemption of GST on foreign exchange billing.
- **Tax Refund for Tourists (TRT) Scheme:** - There is a provision made in GST Law for Tax Refund for the Tourists' (TRT) scheme provided for, under section 15 of the IGST Act 2017, which has not been implemented yet. This will help foreign tourists to spend more on shopping which will increase foreign exchange earnings for the country.
- **Waive off import duties:** Waive off all import duties required to upgrade tourism infrastructure.
- **Import of Tourist Vehicles under EPCG Scheme:** Enable permission to import of tourist vehicles under EPCG by tourism services exporters.
- **Additional incentive for duty free imports:** Enable an additional incentive for duty free imports of up to 5% of net FEE during current year.

4.3.3. Requests from state associations

| State | Demands from the industry |
|---------------------------------|--|
| Assam | The Assam Tourism Development Corporation has requested the state government to disburse a sum of ₹6 crores to help people persist through this time and revive the tourism industry. |
| Arunachal Pradesh ³¹ | The Arunachal Pradesh Tourism Operators Association has requested a waiver, but has not specified on what grounds. |
| Goa | <ul style="list-style-type: none"> • Financial institutions should provide six to nine months' moratorium on loans. • Sanctioned loans should be disbursed. • Stamp-duty and registration duty should be reduced. • 50 percent reduction in GST. |

³¹ [Arunachal's tourism industry hit hard by Covid-19](#): The Arunachal Times, April 25, 2020

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| | <ul style="list-style-type: none"> The TTAG had protested non-inclusion in the state's economic recovery panel and was given a seat thereafter. |
| Himachal Pradesh | <p>Manali Hoteliers' Association (MHA), the largest association of the state, has written to chief minister Jai Ram Thakur requesting the following:</p> <ul style="list-style-type: none"> To contribute to the salary of the staff by adding 50% share from schemes like MGNREGA till the time hotels are closed. To charge electricity bill on domestic rates and not on commercial basis. "Water charge, house tax, garbage charges, sewage charges and pollution charges should be exempted till hotels open again. To attract tourists once the crisis is over, allowing tax holidays for at least six months. Advance tax deduction, income tax up to ₹10 lakh should be waived off, Renewal fees for bar license, pollution etc should be deferred for one year and new working capital loans should be available without collateral from banks at 0% interest for hospitality sector and minimum credit limit should be ₹15 lakh. <p>The Hotel and Restaurant Association, Shimla has made the following requests³²:</p> <ul style="list-style-type: none"> Sought interim relief in the form of GST waiver Requested the state to defer power and water bill. |
| Karnataka | <p>Member of Karnataka Tourism Society, a collective to promote tourism in the state have requested the following from the state government³³:</p> <ul style="list-style-type: none"> They have been pushing for relief from the government to stem the financial loss. Tourism stakeholders have petitioned the government for a fund for 12 months to support basic salaries with direct transfer to the affected tourism employees and tax waiver due to mass cancellation of tours and hotels. They have requested full exemption from payment of GST for the next 6 months and a moratorium on debt repayment and monetary support to contracted workforce. They have also appealed for an exemption from payment of loan instalments for the next 6 months and not to treat the break in instalments as non-performing assets (NPA). Another issue taken up is the deferment of the proposed Tax Collected at Source (TCS) on travel in Finance Bill 2020. Appealed to the state government for 50% concession on payment of property tax and permission to pay it on or before September 30, 2020 without any kind of penalty/interest. Tour operators, employee transport operators, all India permit buses/mini coach operators, maxi cab operators, state & all India permit vehicle operators have sought exemption from payment of the quarterly Vehicle Road Tax for the upcoming quarter (from April 1, 2020 to June 30, 2020). Other exemptions sought include payment of 50% of Annual Excise License Fee on or before September 30, 2020. |

³² [No tourists. Himachal travel industry with 5800 hotels seeks relief in peak season](#): India Today, April 30, 2020

³³ [Focus on domestic tourism: Karnataka hospitality industry's post-lockdown plan](#): The News Minute, April 28, 2020

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| <p>Kerala</p> | <p>The Kerala tourism industry has given a representation to the Prime Minister, Union Finance Minister, the state CM and the State Finance Minister requesting a revival package. They have asked for the following:</p> <ul style="list-style-type: none"> • Offering the state's tour operators, a cumulative sum of ₹5 crore as the Marketing Development Assistance (MDA). • Provide 50 per cent salary support to all employees. • Taxes such as corporate and municipal taxes, and license fees may be deferred for six months. • Regarding electricity high tension (HT) users, they may be charged minimum rates and electricity subsidy reinstated for their benefit. • MDA scheme may be extended to the hospitality sector also with an amount of ₹10 lakh per unit in advance, as a lump sum. • Homestays may be given ₹2 lakh in lumpsum as advance. • The registered taxi drivers have a welfare fund and their salaries may be paid from this fund for six months. The fund is already with the welfare board and only needs to be quantified. • Banks and financial institutions should extend a moratorium for the next 12 months on all interest, principal to be paid on loans availed by tourism entrepreneurs through a special directive. |
| <p>Odisha</p> | <p>The Hotel and Restaurants Association of Odisha has asked the government for the following³⁴:</p> <ul style="list-style-type: none"> • Prepare a marketing plan before it eases a lockdown to contain the coronavirus outbreak. • Suggested that a COVID-19 task force be constituted with five to six members drawn from the association with the endorsement of the department of tourism. • Demanded a revival package to bail the distressed industry out of this unprecedented crisis. • Stating that the moratorium of three months on loans announced by the Reserve Bank of India (RBI) won't suffice, HRAO has demanded that the tenure should be extended to one year on all working capital, principal & interest payments and loans & overdrafts. • SMEs should be allowed to avail collateral and interest free loans in tourism to help them sustain and rebuild. • SGST should be waived off till the time the situation becomes normal. • Waiver of fees for any upcoming licenses/permits renewal for the hospitality and travel industry across the state till the time revival happens. |
| <p>Punjab</p> | <p>The Hotel and Restaurant Association of Northern India has requested for the following:</p> <ul style="list-style-type: none"> • It has approached the Chief Minister to provide a financial package to the hospitality industry. • Property tax and water charges from April 1 onwards should be waived for three years. • Excise license fee for 2020-2021 should be deferred for six months and the validity of the license period be adjusted and carried forward till September 30, 2021. |

³⁴ [Odisha hoteliers ask for tourism marketing plan before lifting lockdown](#): Business Standard, April 20, 2020

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| <p>Rajasthan</p> | <p>In a brainstorming session with the tourism minister and other stakeholders, some of the suggestions that came up were³⁵:</p> <ul style="list-style-type: none"> • Fixed prices for electricity need to be reconsidered. • The industrial rates should be levied. • Tourism Department needs to undertake a proactive advertising campaign in the leading newspapers and channels. • The Palace on Wheels should tie up with private museums and monuments. • Proper health guideline to be given for the visiting tourist after the lockdown is lifted. • A toll-free number for the tourists so that they can get immediate information about the state. • Film shooting was another potential area in which the government needed to support waiving the fee and making the required permissions for shooting easier. • Domestic Tourism Mart should be immediately planned in Jaipur with familiarization tours of the travel agents organized all over the state. • Reduction of GST rates • Improvement in hygiene. |
| <p>Sikkim</p> | <p>The Himalayan Hospitality and Tourism Development Network has requested the following:</p> <ul style="list-style-type: none"> • SGST holiday for 12 months, • Reduction of license fee for trade, excise, garbage, water, FSSAI or power bill etc till October 2021. • Demand for soft loan or waiver of interest against loan from state owned financial institutes for 12 months. • Review of charges and regulations on travel inside the state for trekking, hiking or monumental fee. |
| <p>West Bengal</p> | <p>Tourism stakeholders in the states have asked for:</p> <ul style="list-style-type: none"> • A complete tax waiver on GST. • Reduction in corporate tax that is charged between 25-30 per cent. • Rollback of tax collection at source (TCS) which is five per cent of the payment to tour operators for foreign travel. |

4.4. Cleanliness and Sanitation Initiatives

- **Marriott International – Global Council for New Cleanliness Standards:** The hospitality leader has rolled out a multi-pronged platform to elevate its cleanliness standards and hospitality norms and behaviors to meet the new health and safety challenges presented by the current situation. As a commitment to the health and safety of guests, has created the Marriott Global Cleanliness

³⁵ [Rajasthan Tourism brainstorms with tourism stakeholders](#): Indian Education Diary, April 28, 2020

Council to tackle the realities of the COVID-19 pandemic at the hotel level and further advance the company's efforts in this area. The Marriott Global Cleanliness Council is focused on developing the next level of global hospitality cleanliness standards, norms and behaviors that are designed to minimize risk and enhance safety for consumers and Marriott associates alike. The Council will benefit from knowledge and input from both in-house and outside experts including senior leaders from across Marriott disciplines and advisory members in the space of health, hygiene, disease specialist and academia

- **Radisson Group – Tips and Insights to Make a Positive Difference:** The Group launched #RadissonCares Campaign in India that leverages the Group's expertise across a range of service areas to make a positive difference in the lives of its guests. It will be rolled out in five phases and will bring together tips and insights in the areas of housekeeping, food and beverage, elderly care, and health and wellness from the Group's well regarded and globally recognized service professionals. Subsequent phases of #RadissonCares will present expert advice from chefs and service professionals through which guests can learn how to keep their homes safe and hygienic, use immunity building ingredients in home cooked food, keep the elderly healthy and safe, and ensure personal wellness through this initiative
- **Hyatt and Hilton Hotel Chains – Curated Home Deliveries:** The premier hotel chains collaborated with Zomato and Swiggy to serve select food items from the comforts of homes for 'safe and contactless delivery'. Stringent hygiene protocols have been put in place to ensure safety such as regular staff health-checkups and ensuring that everyone wears face masks, gloves, caps and use of sanitiser. There are stringent quality check procedures in place for the delivery staff, including temperature checks, sanitisation of vehicles and cleanliness checks, in addition to the use of masks and gloves. For packaging, Hilton will be using biodegradable plastic, paper, and cardboard
- **Accor Hospitality – Health and Safety Standards Label:** Global hospitality group Accor and certification services provider Bureau Veritas are launching a health and safety standards label to help hospitality businesses in Europe reopen safely. Hospitality establishments can be certified under the label when they are found to have met its stipulated cleaning protocols and appropriate safety standards. The label will cover both accommodation and catering services, and will lay out sanitary standards for Accor's hotels, other chains and independent hotels. Initiated in conjunction with doctors and epidemiologists, the label was developed through partnership with trade associations. Eventually, an operational guide for all hospitality industry stakeholders. The guide would allow stakeholders to effectively apply the health and safety recommendations set by authorities such as the World Health Organisation (WHO).
- **Pride Hotel Group:** 'Work From Pride' is an initiative where an alternate workspace; like an office kind of setup with work desk space and business centre facilities will be arranged for the mid-senior level people who are accustomed to travelling and working in isolation. Professionals in the field of IT, Finance, Business Development, among others. All the facilities and set up will be customized and designed based on guest preferences. Pride Hotels will provide guests with a comfortable and sanitized stay and as
- **Airbnb:** Short-term property rental app, Airbnb is adapting to the coronavirus outbreak by introducing a new "enhanced cleaning initiative" effective from May. The new protocol for maintaining hygiene includes a 24-hour vacancy period between bookings. It does not apply for property hosts, but guests will be able to see which hosts are participating in the cleaning initiative in search results on the platform. This is among the "first overarching standardized protocol for

cleaning and sanitization in the home sharing industry”. Its work to come up with the cleaning protocol is “informed by the US Centers for Disease Control and Prevention (CDC) published standards; leading experts such as Dr. Vivek Murthy, former Surgeon General of the United States; and companies in the hospitality and medical hygiene sector, such as Ecolab. This is an initiative to support guests and hosts in the future of travel and Airbnb will continue to work to ensure that their guidance reflects the most recent information made available by leading medical experts and authorities.



GOVERNMENT RESPONSE

5. GOVERNMENTS' RESPONSE

The unparalleled and unforeseen impact of the pandemic on our economies, livelihoods and communities has brought the world to a standstill, with a few sectors that are more severely affected. While travel can only resume once the virus is contained, below are a few measures/ initiatives undertaken globally in an attempt to support the tourism and ancillary sectors and lessen the massive loss of jobs.

During this fast-changing reality, it is difficult to assess the real impact on the international tourism sector. However, approximately 80% of the sector comprises of small and medium-sized enterprises. As a result, there will be paramount social impact which will be a concern for the global community.

5.1. Measures taken by countries across the globe

| Country | Measure |
|---------------------------|--|
| Australia ³⁶ | <ul style="list-style-type: none"> \$1 billion fund to support sectors, regions and communities disproportionately affected by the economic impacts of the coronavirus, including those heavily reliant on industries such as tourism, agriculture and education Waiver of Environmental Management Charge for tourism businesses that operate in the Great Barrier Reef Marine Park Waiver of fees and charges for tourism businesses that operate in the Commonwealth National Parks \$130 billion JobKeeper Payment to keep more Australians in jobs and support businesses affected by the Coronavirus |
| New Zealand ³⁷ | <ul style="list-style-type: none"> \$12.1b coronavirus rescue package which will include wage subsidies of \$585 per full time employee and \$350 for a part timer, up to a cap of \$150,000, providing much needed relief for small businesses. |
| France | <ul style="list-style-type: none"> Set up a €2 billion Solidarity Fund, for which many Travel & Tourism businesses will be eligible for, given that it that it applies to businesses meeting the following criteria - Businesses whose activity has been closed (mainly refers to catering businesses (which are 160,000), non-food trade (140,000), tourism (100,000) €8.5 billion euros have been dedicated to the funding of short time working /partial unemployment measures |
| Italy | <ul style="list-style-type: none"> As part of its "Italy Cure" package, the Italian government has put worker protection at its core through the reactivation of the Cassa integrazione for all the sectors, whereby the government pays 80% of the employee salaries Self-employed or seasonal workers can apply for a special pay-out of €600 in March. Families can apply for permission to suspend their mortgage payments if business shutdowns caused by the pandemic threaten their livelihood |
| Hong Kong | <ul style="list-style-type: none"> Created the Anti-Epidemic Fund's Travel Agents Subsidy Scheme through which some 1,350 travel events have received payments |

³⁶ [CORONAVIRUS INFORMATION AND RESOURCES FOR AUSTRALIA'S TOURISM INDUSTRY](#): Tourism Australia

³⁷ [Tourism industry welcomes Government package but worries about limits on assistance](#): Stuff, March 2020

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| | <ul style="list-style-type: none"> Each eligible travel agent may receive a one-off subsidy of HK \$80,000. 98% of all licensed travel agents in Hong Kong have registered for the payment |
| Germany | <ul style="list-style-type: none"> Government pledged unlimited cash to businesses and is suspending legal obligations for firms facing acute liquidity problems to file for bankruptcy until September Government's liquidity assistance envisages a massive expansion of loans provided by KfW, from €460bn to €550bn (\$610 billion) the country's development bank |
| Singapore | <ul style="list-style-type: none"> Waiving license fees for hotels, travel agents and tour guides, enhanced training schemes and subsidising them up to 90% Providing salary support through Workforce Singapore of up to 70% of fixed monthly salaries (capped at \$2000 a month per employee). Enhanced Enterprise Financing Scheme-SME Working Capital Loan as well as implementing a corporate income tax rebate for YA2020 of 25% of tax payable, capped at \$15,000 per company |
| United Kingdom | <ul style="list-style-type: none"> 12-month business rates holiday for all retail, hospitality and leisure businesses in England Grant funding of £25,000 for retail, hospitality and leisure businesses with property with a rateable value between £15,000 and £51,000 Small business grant funding of £10,000 for all business in receipt of small business rate relief or rural rate relief Created the Coronavirus Business Interruption Loan Scheme, offering loans of up to £5 million for SMEs through the British Business Bank will be launched in March Will provide lenders with a guarantee of 80% on each loan to give lenders further confidence in continuing to provide finance to SMEs and businesses can access the 12 months of that finance interest free. No business will pay VAT from now until the end of June |
| Philippines | <ul style="list-style-type: none"> Sector will receive a significant portion of the government's \$523 million support package. Specifically, \$271 million aid from the Tourism Infrastructure and Enterprise Zone Authority (TIEZA) has been earmarked for various programmes and projects of the Department of Tourism To support workers, \$23 million from the Social Security System will be used as unemployment benefits for workers from the private sector To promote the Philippines as a destination once in the recovery phase, the Department of Tourism (DOT) is allocating approximately \$118 million. At least PHP421 million earmarked for a new campaign for domestic travel and PHP467 million to create content that targets emerging countries unaffected by Covid-19. |
| Spain | <ul style="list-style-type: none"> Announced a financing line of €400 million with guarantee from the ICO (Official Credit Institute of Spain), for self-employed and tourism companies domiciled in Spain in need of liquidity with a limit of €500,000, including transport companies, taxis, hotels, restaurants, car rentals, travel agencies, museums. The funds operate as a 4-year loan; with a fixed interest rate (with a maximum of 1.5%) in which the ICO will guarantee Credit Institutions with a 50% of the risk of their clients Of the €200 billion fund, half of the money is tied to a public guarantee scheme to ensure liquidity for struggling businesses, specifically to ease the conditions of |

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| | the temporary collective layoffs (known as ERTes in Spain), supporting workers and businesses affected by the slump in activity, and guaranteeing liquidity for businesses. |
| Portugal³⁸ | <ul style="list-style-type: none"> Dedicated €60 million credit line for micro-enterprises in the tourism sector and by working closely with Turismo de Portugal to bolster national capacity to respond to the challenges being faced Other key measure include extraordinary support for the maintenance of employment contracts in a company in the amount of 2/3 of the remuneration; ensuring 70% of Social Security, the remainder being borne by the employer; offering of training scholarships in the Institute for Employment and Vocational Training in Portugal (IEFP); and extending the deadlines for payment of taxes and other declarative obligations |

5.2. State-wise impact and measures in India

While the impact of COVID-19 can be felt by the tourism industry across the country and the world, localized state tourism associations have taken the lead in requesting the state governments to take action on their behalf. The impact and demands in some states have been captured below:

| State | Economic Losses | Job Losses | Government Reaction |
|---------------------------------------|---|--------------------------------|--|
| Assam | <ul style="list-style-type: none"> ₹200 crore 3,000 packages cancelled | 2,00,000 people impacted | The Assam Tourism Development Corporation has requested the government to disburse ₹6 crore to help revive the sector |
| Arunachal Pradesh³⁹ | 20,000 foreign tourists coming to the state have cancelled their bookings | - | <ul style="list-style-type: none"> The Tourism Minister Nakap Nalo has assured that the government would help those in the tourism industry. The Tourism Director has approximated that it would at least two years for tourism to recover. |
| Goa | <ul style="list-style-type: none"> ₹1,000 crores 40% of the state's revenue | Job losses of 60,000 to 75,000 | <ul style="list-style-type: none"> The Chief Minister has made public statements stating that the government does not have the resources to bail out industries. Another state minister has said that tourism will only be looked at after the current situation is brought under control. |

³⁸ [Government COVID-19 Hub](#): World Travel & Tourism Council

³⁹ [Arunachal's tourism industry hit hard by Covid-19](#): The Arunachal Times, April 25, 2020

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| Himachal Pradesh | Not yet assessed | Thousands of job losses (no exact assessment yet) | In a statement, the Additional Chief Secretary for Tourism and Health stated ⁴⁰ : <ul style="list-style-type: none"> • The government will render all types of help to the affected people. • The state is raising the issue of a GST waiver on tourism with the Central government. • The state government has already decided to defer the payments of water and power bills. |
| Karnataka | - | Over 18 lakh people who are directly employed | The government has unveiled that going forward their focus is going to be on tourism <i>for the local, by the local</i> with the concept of “ <i>nodu ba nammura</i> ” (<i>Come, see my hometown</i>). ⁴¹ |
| Kerala | Estimated loss of ₹20,000 crores | - | <ul style="list-style-type: none"> • The state is looking to focus on bringing in domestic tourists in the near future. • The state is gearing up for post-COVID-19 era by coming up with six theme-based microsites in the official website to promote destination and tourism products and get an upper hand in the virtual marketing among brands. • The tourism department is convening a tourism advisory committee following the lockdown to chalk out strategies and promotion activities. |
| Maharashtra | - | - | <ul style="list-style-type: none"> • The state government has begun speaking with other states to promote domestic tourism after the lockdown is lifted. • Maharashtra is also in discussions with other states to introduce ‘special packages’ for tourists. |
| Odisha | - | - | The tourism department has given assurances to stakeholders in the industry that their concerns will be considered. |
| Punjab | The industry is suffering an estimated loss of ₹960 crores per month | 3 lakh families are directly dependent on the tourism industry | - |

⁴⁰ [No tourists, Himachal travel industry with 5800 hotels seeks relief in peak season](#): India Today, April 30, 2020

⁴¹ [Tourism plan: For the local, by the local, of the local](#): The New Indian Express, May 1, 2020

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| <p>Rajasthan</p> | <ul style="list-style-type: none"> • 20-30% bookings have been cancelled • ₹5,000 crores industry come to a grinding halt | <p>10,00,000 livelihoods impacted</p> | <ul style="list-style-type: none"> • The Government has requested the Centre to waive / postpone payments of GST. • Reduction in restaurant and bar license fee. • Reimbursement of SGST from April to June 2020. • Employees of the Department of Tourism are donating a day's wages to the CM's Relief Fund. • The tourism department held a roundtable with industry stakeholder where they took the views of player's under consideration and brainstormed ways to revive the industry. |
| <p>Sikkim</p> | <p>₹400 crores worth of annual tourism business</p> | | <p>The state government has requested the Central government to give a GST holiday for 12 months, a waiver on interest or moratorium for 12 months, and inclusion of tourism promotion under CSR activity.</p> |



TRAVEL IN A POST COVID-19 WORLD

6. TRAVEL IN A POST COVID-19 WORLD

While analysts across the world predict the extent of damage that COVID-19 will have on the tourism industry, the one thing they can all agree upon is the fact that tourism is not likely to look the same in the near future. With major revenue losses and business shutdown, the tourism industry is already beginning to look at creative ways to move beyond this pandemic to create revenue sources and pivot towards viable business models.

6.1. *Air Travel and Airlines*

- **Automation:** Aviation and airports had already started moving towards automation, and the present situation will only give a larger impetus towards the same. For instance, Etihad Airways has announced that it will be trialing a range of contactless, self-service technologies, developed by Elenium Automation, that can estimate a passenger's vital signs and allow for touchless, virtual health screenings at airport kiosks and bag drops.
- **Social Distancing:** Social distancing is going to be the norm, and this is expected to impact airline revenues. In India, there is already talk of not letting more than one-two passengers per row in an airplane with appropriate distance between all passengers.
- **Virtual Queueing:** Normal queues end up bring people closer and violating social distancing norms. To counter this impact, earlier this year Delta Air Lines launched a virtual queuing feature on its Fly Delta app, which notifies passengers when their seat is boarding. Similarly, Gatwick Airport and easyJet also recently trialed boarding by seat number to try to reduce queues and boarding times.
- **Sanitization of Airplanes:** Focusing on the inflight experience, passengers' hygiene and sanitation concerns will be amplified. Many airlines have already taken to mainstream and social media to showcase their aircraft cleaning procedures to reassure passengers that cabins are and will be clean.
- **Passenger Testing:** To ensure that COVID positive and symptomatic passengers are not flying, airlines and airports could institute necessary temperature and antibody tests as a precondition to flying for the coming year.
- **Compulsory masks:** At present, face masks are not a legal requirement to board an aircraft. Some airlines across the globe have begun to make it mandatory, while others are still mulling over their options.
- **Increased cost of travel:** Given the multitude of changes that need to be implemented, and the reduction in the capacity per plane, both the fixed and variables cost will be added to the limited numbers; thus, the cost of travel can be expected to increase in multiples.

6.2. *Rail travel*

- International Union of Railways (which calls itself IUC) has, which has 194 members spread across the globe has come out with a report to guide the management of COVID-19 among railway stakeholders worldwide during the coronavirus pandemic.
- It has suggested reducing occupancy in trains, no linen, health checkup of passengers, medics, and Personal Protective Equipment (PPE) kits on board and no-touch ticket checking
- It has also suggested railways adopt policies to reduce the likelihood of transmission, for example: removing magazines, booklets, menus, blankets, pillows, headphones, etc. from the carriages; and in night trains change the blankets after every single use.
- With travelers in the post COVID-19 world becoming more conscious about the social distancing norms and at the policy front government's trying to enforce this more strictly, the Indian Railways would also have to make physical and structural changes in terms of seating arrangement, sanitation and disinfectant protocols etc.

6.3. *Virtual tourism and experiences*

Virtual Reality and Augmented Reality may finally find its day in the sun. Virtual reality can be used to capture tourism destinations in a unique and immersive way. This is achieved using specialist cameras, rigs, and software. The finished content can then be viewed on either a VR headset or a regular computer or mobile device.

Thanks to developments as such and the proliferation of the same due to COVID-19, consumers may now visit new and exotic places without leaving the comfort of their home – not to dismiss the economic impact on resorts, hotels, and employment at such destinations. This trend is already picking pace in India and across the world.

- State governments have already started looking at alternate revenue sources to make up for the losses that will be seen due to a fall in traditional tourism. While this will not make up for the lost revenue, people are more likely to go digital to showcase their skill sets, teach and build equity for the long run.
- The British Museum has set up a virtual reality tour allowing you to select from a number of historical periods of across various continents so you can travel in both time and space.
- Alternatively, you can visit the Louvre's exhibitions and galleries via an online tour to get your art fix.
- The Guggenheim Museum in New York City also made 1700 important artworks available online after having to close due to social distancing measures.

Virtual reality may never replace traditional travel, but it still offers intriguing possibilities. If the technology becomes sophisticated enough, the more environmentally conscious among us—especially those aiming to reduce our carbon footprint (or people sensitive to flight-shaming)—might prefer this form of escape. VR travel does bring parts of the world to people who are physically unable to visit certain landmarks. Most of all, it could help bring people to places that are otherwise inaccessible.

6.4. *Domestic Travel: Venture Close to Home*

With borders shut and restrictions on movement across countries, global inbound and outbound tourism is going to reach near nil levels. People still craving a break are likely to focus on localized tourism. In

the near time, people will most likely want to forego air or any other form of shared travel and prefer regions with driving distance. Localized domestic tourism is going to be the driver of any growth in this sector in the near future.

This is likely to increase the number of people opting for staycations or slow tourism. We can expect a boom in local tourism. For example, France already leads the way in establishing visitors' programs such as #ExploreParis, Loire à Vélo and Un air de Bordeaux.

For the growth of staycations and slow tourism, the role of governments in providing the necessary infrastructure and in promoting the private sector's commitment to invest in local tourism spots is expected to be critical.

6.5. *Trusted Brands*

When people do start travelling once again, during the initial days, they would prefer going with trusted brands over smaller hotels, as trust in safety procedures will be of paramount importance. Additionally, hotels in the heart of the city, walking distance from tourist destinations will be preferred and forms of mobility are likely to be avoided.

Keep in mind, the dynamics of changed consumer behavior post-crisis, players across the board need to invest more in sanitation and hygiene. With social distancing being a norm for a while and "Stay Home, Stay Safe" being the new way of life, it will be imperative for the industry to offer consistent assurance and clear communications on maintaining new levels of health standards to attract travelers.

6.6. *Sanitization and pre-screening: the new normal*

In his piece for the Financial Times⁴², Yuval Noah Hariri argues that given the integration of the world, it would be hard to completely suspend all international travel. That being said, it would be necessary for all countries to ensure rigorous pre-screening before allowing any person aboard a plane. Governments in India have already begun to make strides in this direction.

- In Goa, there are talks of foreign tourists requiring a health certificate to visit.
- Even airlines such as Emirates and Etihad are already experimenting with new procedures like mandatory blood tests for all passengers and staff.
- Another idea floated is that of an immunity passport. These documents would certify that the holder has been infected with coronavirus and has overcome it, having now developed the relevant antibodies to make them immune.

These ideas coupled with screening at railway stations and airports could completely shifting the conditions for travel from being dependent on economics to being dependent on both economics and health of an individual.

6.7. *An opportunity for sustainable travel*

Air travel features prominently in discussions about reducing carbon emissions. Even if commercial aviation accounts "only" for about 2.4% of all emissions from fossil-fuel use, flying is still how many of us in the industrialised world blow out our carbon footprints. In many places' tourism has grown beyond its sustainable bounds, to the detriment of local communities. The over-tourism of places like Venice,

⁴² ["The World After Coronavirus"](#): Yuval Noah Hariri, March 20, 2020

Barcelona and Reykjavik is one result. Cruise ships disgorge thousands of people for half-day visits that overwhelm the destination but leave little economic benefit.

COVID-19 is a radical wake-up call to this way of thinking. Staying closer to home could be a catalyst awakening us to the value of eating locally, travelling less and just slowing down and connecting to our community. These may result in a dip in total figures for tourism but may also show the path for the growth of an environmentally sustainable and conscious future of travel.

RECOMMENDATIONS: BRACE FOR THE ‘NEW NORMAL’

With the existing visa restrictions, grounded flights as well as inter-state lockdowns, it will take time for the travel and tourism sector to gain momentum. With the multi-faceted impact on the sector, the economic revival of the sector is a gradual process and at this time it is uncertain to analyze the exact situation. However, once the restrictions begin to ease, the industry players must adopt to deal with the health and safety challenges that the world is posed with by the pandemic environment.

- **Cost Optimization at Operational Levels:** Owing to depleting cash flows, corporate business will be facing a liquidity challenge and as a result spend less on travel and consumer behavioral change will be evident, which will continue to impact profits of travel companies, operators and hotel owners. They should be able to analyze and implement bare minimum operations enough for quick recommencement
- **Develop a Marketing Messaging:** Strategize and devise marketing campaigns to attract and welcome customers with specific narratives on safety, health and hygiene to re-establish connections. Depending on destinations, tourism entities should also look at collaborating – accommodations, tour operators and small business, maybe along with an industry association to promote overall destination.
- **Focus on Domestic Travelers:** Governments across the world have sealed border, therefore the need will be to focus on domestic demand first. Promote special experiential packages targeted at ‘locals’ and even within the cities promote packages for specific target groups such as ‘Staycations’
- **Set-Up Cleanliness Process/ Task Force:** Not only will the government standards resulting from the pandemic will dictate new levels and requirements for the accommodation and lodging sector, public expectations for health and safety will be higher. There is a need form cross-functional response team or task force to adhere and ensure strict compliance of new processes as a reassurance to guests.
- **Mechanism to Re-Engage with Prior Bookings:** Devise a mechanism to re-look and analyze all the bookings that were previously cancelled or deferred and attempt to honor in good spirit
- **Creativity and Flexibility in Bookings:** Industry players should collaborate and think from a long-term perspective by looking promoting value-added services and flexible booking terms instead of typically reducing rates, offering flexible cancellation, and rebooking policy to attract existing and potential guests
- **Destination Standards:** Come together and work with local tourism board to develop cleanliness standards and certification processes. Not only with this help the hotels and accommodation sector to develop standard operating procedures but can be part of the overall promotion and visibility campaign for the destination itself

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CONTACT US



Manash Neog, *Executive Vice President and Co-Founder*

Mobile: +91 98113 07549

Email: manash@chase-india.com



Suryaprabha Sadasivan, *Vice President*

Mobile: +91 98339 09285

Email: surya@chase-india.com



Avika Sood, *Director – Public Policy*

Mobile: +91 98188 29707

Email: avika@chase-india.com



Sharang Shah, *Manager – Public Policy*

Mobile: +91 99672 44222

Email: sharang@chase-india.com



Sagar Deoskar, *Manager – Public Policy*

Mobile: +91 85510 68104

Email: sagar@chase-india.com

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