

Analysing the Differential Performances of Indian States in the Tourism Sector: (1947-early 2020)

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Abstract

Tourism is an ever-evolving and dynamic industry that can play a crucial role in increasing income and providing employment opportunities in an economy. India, especially with its rich heritage, culture, and geographical landscapes, has always had immense potential to become a leading tourist destination. Presently the major types of tourism prevalent in India are Medical Tourism, Rural/Natural Tourism, Religious Tourism, Historical & Educational Tourism. In 2018-19, the tourism sector contributed around 5% to India's GDP. However, with the unexpected crisis of Covid-19, the tourism sector has taken a major hit since early 2020. Several thousands lost their jobs in the tourism and hospitality sector when different states imposed lockdowns and took various other measures to curb the pandemic. As restrictions in each state eased after the first wave of the pandemic,

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different states in India adopted various policies to revive the tourism industry. But to understand the effectiveness of these policies in each state/ UT, one needs to investigate the baseline at which the Tourism industry was before the pandemic hit the country. This paper attempts to look at the differential performances of states and UTs of India in tourism by categorizing them into various types of tourism between 1947 and March 2020. This paper also aims to act as a base for further analysing the impact of this pandemic on Tourism across states in India.

Keywords: Medical Tourism, Rural/Natural Tourism, Religious Tourism and Historical and Educational Tourism, Policy analysis, Covid-19

1. Introduction

In a globalized world, tourism has become an extremely crucial sector for any economy regardless of its size or geographical location in the world. The tourism sector helps in the economic growth of a nation through the generation of employment and its capacity to earn foreign income. In this process, it helps to accelerate socio-economic development of an economy (Mishra et al, 2011). It's interesting to carefully analyse the formation of the structure of the tourism sector in India since its independence. It was in the Second Five Year Plan (1956-61) that tourism was recognized as an economic activity in India. In 1966, the Indian Tourism Development Corporation (ITDC) was introduced followed by progression in transportation as well as communication systems which further helped to advance the tourism industry. In the Sixth Five Year Plan (1980-85), tourism was recognized as an instrument essential for economic development and social harmony. After the 1980s, tourism activity boomed, making it a source of employment, income and foreign exchange. In November 1982 the government of India announced its First Tourism Policy which was aimed at promoting sustainable tourism and promotion of India as a country with great tourism potential for its rich culture and history to the countries abroad. The policy emphasized on the role of the private sector, its management and

alsoand the inclusion of the local community as well. The policy created tourism economic zones, circuits and tourism areas(Akoijam, 2020).

Under the Tenth Five Year Plan, the National Tourism Policy 2002 was introduced, which focused on capacity building in the hospitality sector, faster implementations of tourism project development of integrated tourism circuits, and private-public partnerships to undertake revenue-generating projects like cruises, tourists trains etc. It also realized the importance of technology and managerial talents for the development of tourism infrastructure and hence gave financial support for a study tour of India, participation in exhibitions abroad and marketing. The Tenth Five Year plan also promoted training programs in the hotel and food industries for skill-building. It also promoted adventure tourism in the Himalayas, beach tourism in the coastal areas, wellness tourism such as Ayurveda as well as shopping centers for traditional handicrafts. The Eleventh Five Year Plan allocated more funds for the development of the tourism sector, diversified the sources of tourism marketing and promoted partnership between the central, state government and private sector(Akoijam, 2020).

The Twelfth Five Year Plan (2012-2017) highlighted a pro-poor tourism approach to increase the benefits from tourism to the poor which could contribute to poverty reduction. It recognized that in India, the tourism sector is mostly based on exploitation of the biodiversity, forests, river, and its rich culture and heritage and hence encompasses the challenge of preserving them as well for the tourists. It also supported the need to develop strategies for branding, marketing, policy, investment and infrastructure development.

In recent years, the Indian government has undertaken several initiatives to boost tourism in India. It includes the **Hunar Se Rozgar Programme**, launched in 2009-2010, with the aim of reducing skill gap affecting the tourism and hospitality sector. The **Tourist Visa on Arrival facility**, introduced in 2010 helps in increasing tourist inflow (Secretariat, L. S.,2013). In 2014-15 the Ministry of Tourism initiated the Swadesh Darshan Scheme, which aimed to develop theme-based tourist circuits. The **Prashad scheme**

focuses on identifying and developing pilgrim sites across the country to enrich religious tourism experience.

The Economic Survey of India 2021, highlighted that India was ranked 34th in the Travel and Tourism Competitiveness Index, advancing from 65 in 2013. In 2018-19 this sector contributed about 5% to India's total GDP and approximately 13% of total employment. India was ranked 23rd in the world in terms of international tourist arrivals in 2019. In 2019, Uttar Pradesh had the highest percentage share of the domestic tourist visits which was closely followed by Tamil Nadu with 21 percent share. Telangana, Gujarat and Rajasthan were at the lower end of the top 10 states visited by domestic tourists; 3.6, 2.5 and 2.2 percentage respectively (Table 3 & Fig. a). Table 4 shows that in 2019, Tamil Nadu was the most popular and frequently visited state by foreigners. Goa acquired the 10th position with 3 percent of the foreign tourist visits (Table 4 & Fig. b).

During the first wave of the Covid-19 Pandemic in which the industry suffered losses, the foreign tourist arrivals were about 2.46 million as of January-June 2020 as compared to 5.29 million during January-June in 2019. Similarly, there was a fall in domestic passengers during April - November from 95.7 million in 2019 to 22.77 million in 2020 (The Economic Survey of India, 2021). There has been a reduction in budgetary allocation for the Ministry of Tourism from Rs. 2,500 crore in 2020-21 to Rs. 2026.77 crore. This however, is accompanied by a boost in transport and medical infrastructure which may indirectly contribute to forming a crucial base for Inbound & Domestic Tourism and Medical Tourism (Business Standard, February 01, 2021).

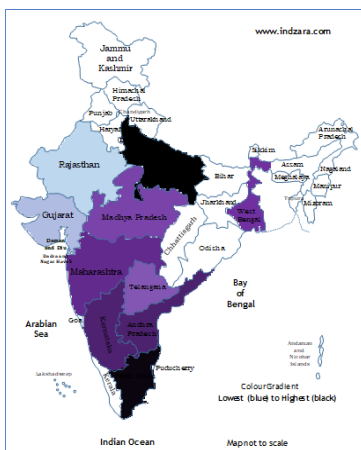


Fig. a. Geographic Heat Map showing top Indian states for domestic tourist visits in 2019. Source: Ministry of Tourism (2019).

Table 3: Domestic Tourist Visits in 2019. Source: Ministry of Tourism (2019)

Rank	State/UT	Percentage Share (%)
1	Uttar Pradesh	23.1
2	Tamil Nadu	21.3
3	Andhra Pradesh	10.2
4	Karnataka	9.8
5	Maharashtra	6.4
6	West Bengal	4
7	Madhya Pradesh	3.8
8	Telangana	3.6
9	Gujarat	2.5
10	Rajasthan	2.2

Table 4: Foreign Tourist Visits in 2019. Source: Ministry of Tourism (2019)

Rank	State/UT	Percentage Share (%)
1	Tamil Nadu	21.9
2	Maharashtra	17.6
3	Uttar Pradesh	15.1
4	Delhi	9.5
5	West Bengal	5.3
6	Rajasthan	5.1

7	Kerala	3.8
8	Punjab	3.5
9	Bihar	3.5
10	Goa	3

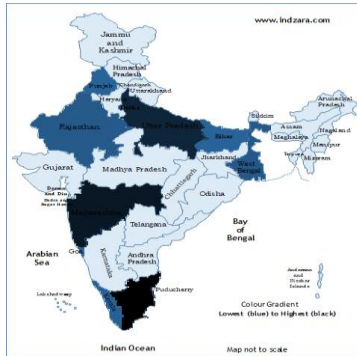


Fig.b. Geographic Heat Map showing top Indian states for Foreign tourist visits in 2019. Source: Ministry of Tourism (2019).

Table 5: Purpose wise Foreign Tourist Arrivals during 2019 (Source: Ministry of Tourism)

Purpose	Percentage Share
Leisure Holiday and Recreation	57.1
Business and Professional	14.7
Indian Diaspora	12.7
Others	9.2
Medical	6.4
Total	100.0

2. Objectives & Scope of the Study

The first research objective within this research paradigm is to study and categorize the different states in India into multiple types of tourism. This is to ensure that the central government, state and local governments and policymakers can use this information effectively in formulating policies on increasing the potential of tourism and hospitality in a Covid and a Post- Covid India. The second objective is to analyse recent papers in this area and draw conclusions for policy perspectives. This paper can also

be used to analyse state-wise effects of Covid-19 on tourism in India.

3. Methodology

To answer the stated objectives, we analysed the intensity of tourism in recent years in different states before the lockdown (till March 2020) and classified them into different types of tourism in India. Using this data we created geographic heat maps for visualizing the data. Please note that the maps have been constructed using the data prior to the bifurcation of Jammu and Kashmir into UTs of J&K and Ladakh. Finally, using the available secondary data sources like newspaper reports, journal articles and research papers, we have tried to analyse the effect of Covid on tourism in different states of India during the first wave of the Covid-19 pandemic (From February 2020- February 2021). The research tool used for data visualization is the geographic heat maps of India constructed on Indzara excel templates.

4. Review of Literature

We conducted a systematic review of the recent literature on the link between economic development and tourism and the dynamic types of tourism in different states of India. The studies clearly show a positive correlation between economic development and a strong tourism sector in the states of India. While analysing the performance of agro-tourism clusters in Uttarakhand by determining the critical success factors (CSF) that affect the agro-tourism performance in this state it was found that the major CSFs were network design, product design and viability, traceability and transparency, co-creation, destination attractiveness, adoption to climate change, governance, forward linkage, local community contribution and sustainable livelihoods, food security and self-efficacy. Results showed that destination attractiveness has the highest priority followed by local community contribution of sustainable livelihoods (Joshi et al., 2020). Another study analysed tourism policies of the states of Kerala, Rajasthan, Maharashtra, UP, Gujarat and Karnataka which discusses the use of social media

for promotion and information distribution. It suggested that destination marketing organizations (DMOs) should plan virtual tours and online competition for increasing user engagement. Using content analysis, it was observed that these states follow similar practices and are overlooking the role of the internet in market research and branding. It suggested that DMO's tourism policy should focus on optimum utilization of the internet in understanding consumer behaviour and preferences to improve tourism services through MIS, data analytics and artificial intelligence (Satghare & Sawant, 2018).

It is interesting to note that over the years, several states have climbed the development ladder due to the strengthening of tourism sector in those states. Kashmir is one such example. In the early 90s, with increasing cases of terrorism in Kashmir, many people engaged in the tourism sector lost their jobs and tourists were discouraged from visiting Kashmir. The state's economy was drastically affected. Since 2000, the performance of the sector has picked up with the help of private and government organisations along with numerous NGOs. The main objective of newly introduced policies and campaigns was to establish Kashmir as a safe tourist spot. Leisure, adventure, business and religious tourism were restored and some new destinations were developed (Bhushan Kumar & Dar, 2014). There is a causal relation between economic development & a strong tourism sector in any state or country. But there's a need for a greater number of linkages for the tourism sector to grow in any state. Both foreign tourists and domestic tourists contribute to the NSDP growth of a state. In the northeastern states, government intervention is required for providing infrastructures like transportation, communication and better accommodation for tourists to earn more revenue from the tourism sector (Sikder, 2014).

The contribution of the tourism industry to India's GDP is high but it is often difficult to quantify it. The meagre knowledge about the inter-linkages of various industries with that of tourism is because tourism is often not mentioned among its industries in India's input-output tables. A study by Poonam Munjal(2013) tries to fill this gap by adding tourism to the input-output table. It shows that

the tourism industry has strong forward and backward linkages with other industries.

Next, we look into some recent literature on the different types of tourism in the states of India. A study by Parida et al. (2017) identifies the factors affecting foreign and domestic tourist arrivals and receipts during the period 1995- 2011. The panel data analysis of 25 Indian states suggests that economic development, presence of world heritage sites and criminal activities impact the arrivals of foreign and domestic tourists. The presence of world-class monuments and cultural heritage attract both international and domestic tourists in Indian states. Hence the study suggests measures for the preservation of cultural sites and enhancement of security to tourists. In the study by Singh & Unjum (2016), the trends within the service sector show an increasing trend of domestic and foreign tourists in Jammu and Kashmir. However, domestic tourists show higher growth than foreign tourists' arrivals. Pilgrimage tourism is the most important type of tourism in Jammu and Kashmir and the tourism sector holds vast potential evident from the results. Kerala is among the top 10 states in foreign travels to India. However, Kerala's share in Indian tourism has not increased over the years, and in terms of domestic travel, it is not among the best 10 states. Kerala has immense underutilized tourism potential leading to it lagging behind all 3 south Indian states in tourist arrival; namely Andhra Pradesh, Tamil Nadu, and Karnataka. There's a need for the adoption of PPP in the state's tourism policy. Eco-friendly strategies for the development of sustainable tourism in Kerala are the adoption of a Public-Private Partnership for the facilitation of resources, a special focus on Medical Tourism especially Ayurvedic Tourism and ensuring the full cooperation and well-being of the local population (Dr. Manoj, 2010)

Kumar (2008) emphasizes the need for inclusion of cultural heritage tourism in ecotourism to establish a connection between the indigenous people and the historic sites. Haryana adopted innovative tourist policies in areas of highway tourism in the 70s, cultural and pilgrimage tourism (80s) and golf tourism (90s). The government gives structural support in improving rural, highway,

religious and heritage tourism. The study by Edward and George (2008) observes that climate, backwaters and local cuisines are the mainstays driving the destination appeal for the international tourist market in Kerala. Destination attraction elements like beaches, art and craft forms, heritage attractions are the areas where destination development and marketing efforts need more attention to turn them into areas of perceived strengths for the destination. Attractions like wildlife, nightlife and adventure activities are less significant factors for enhancing the destination appeal for international tourists. Lastly, attractions like ayurvedic rejuvenation and hill stations are destinations that are perceived better than what is expected. Focused marketing strategy with limited budget, comprehensive tourism policy and development of an array of tourism products are what makes Kerala the leading destination internationally.

5. Findings and Analysis

5.1. Pilgrimage Tourism

To boost tourism in a post-Covid India, it is imperative to use religious and pilgrimage tourism as a strategy (Manhas & Nair, 2020). India being a land of multiple religions, we have traditionally been using our pilgrimage tourism as a soft power (Bhonsale, 2019). In the northern part of India, states like Jammu and Kashmir (now UTs of J&K and Ladakh) have major ancient pilgrimage destinations like Vaishno Devi and Amarnath Cave. Uttarakhand has the Hemkund Sahib, geographically the highest placed gurudwara and an important pilgrimage site for the Sikh community. Haridwar, is also one of the most prominent religious tourist places for the Hindu community of the world. It is considered a sacred town, located near the holy river Ganga. The Kumbh Mela, which happens once every 12 years attract millions to the city. Varanasi in the state of Uttar Pradesh is also a famous pilgrimage site for the Hindu community in India. Vrindavan and Mathura are the other small pilgrimage places in this state. There are a large number of temples of Lord Krishna in Uttar Pradesh and is one of the popular states for religious tourism in North India. Punjab, the land of five rivers, is another Northern state with

great religious significance for Sikhs, Hindus and Muslims. It has a heritage of famous religious shrines & ancient and historical monuments attracting tourists throughout the year. It has the famous Gurudwara Harmandir Sahib, an important Sikh pilgrimage centre in Amritsar.

Among the eastern states of India, Bihar has multiple ancient historical and religious tourist sites. Buddhist pilgrims from all over the world visit Bodhgaya, Bihar for prayer and meditation. Odisha has the famous Jagannath temple in Puri, which comes to life during the RathYatra conducted each year. The Sun temple is another tourist destination visited for its architecture and spirituality. The southern part of India has several ancient temples which are tourist spots. In Andhra Pradesh the Tirumala Venkateswara Temple in Tirupati is a major Hindu pilgrim tourist spot throughout the year. The Sree Padmanabhaswamy Temple in Kerala is another famous religious tourism destination in South India (Chinthu I., 2019). In Tamil Nadu, the Velankanni Church also called as the Basilica of Our Lady of Good Health is a world famous Christian pilgrimage tourist attraction. Rameshwaram in is one of the other popular sites of the pious Char Dhamyatra in India.

In the western part of the country, in Gujarat, the Somnath Jyotirlinga has become more of a tourist destination for spirituality rather than a religious pilgrimage site (Mukherjee et al., 2020). Dwarka in this state is one of the most famous religious destinations in India. The Ranakpur temple in Rajasthan is one of the oldest Jain temples in India and holds a lot of importance for devotees. Another sacred place in Rajasthan is the shrine in Ajmer, the Gharib Nawaz Dargah Sharif, visited by millions of devotees from all over the world. Goa as a pilgrimage tourist center is famous for its churches. Amongst the most famous churches in Goa are Basilica of Bom Jesus, Church of the Lady of Immaculate Conception, Church of St. Lawrence and Church and Convent of St. Francis of Assisi. Shirdi, a town in Maharashtra is a spiritual tourist destination. It is visited by a number of devotees irrespective of religion, colour or creed seeking peace.



Fig. 1.1: Geographic Heat Map of states with Major Pilgrimage Tourism in India (Data Source: Ministry of Tourism, GOI). Data used is prior to the bifurcation of J& K in 2019.

5.2. Rural Tourism and Natural/ Eco-Tourism

Rural tourism refers to a form of tourism which revolves around activities in the countryside and rural areas of India. It includes rural lifestyle, art, heritage and culture in rural areas. At its heart are the interactions between the tourists and the local community which benefits the local communities in India. It has many forms including agricultural tourism, cultural tourism, nature tourism, adventure tourism, and eco-tourism (Nagaraju & Chandrashekara, 2014). Fig 1.2 shows the states with high degrees of rural tourism and nature tourism in India.

In North India, Himachal Pradesh, the land of snow is a land of natural wonders which attracts visitors from across the world. The tourism of Spiti Valley in Himachal Pradesh consists of Buddhist monasteries, treks to villages & yak safaris. Uttarakhand is popular as a biodiversity hotspot with mountains, rough terrains, dense forests and water bodies. It is also home to several religious sites. Moving to the Eastern part of India, West Bengal is a land of misty

mountains, pristine beaches, cultural heritage and religious sites. The government of this state works towards making tourism more sustainable by making the population more community conscience. They promote rural tourism by working closely with the local communities. Among the north-eastern states, Mawlynnong in Meghalaya has emerged as one of the favourite village tourism destinations in the country. The clean environment and famed bridges show their commitment towards Mother Nature. This is why it is called 'God's own Garden'. Sikkim is a state with rich flora and fauna. It is home to the mighty Kanchenjunga, the third highest mountain in the whole world. The state government is taking measures to develop sustainable tourism especially around the forests and the areas surrounding them. Assam is home to endangered One-Horned Rhinoceros in the Kaziranga National park. The unique characteristic of Assam is the River Brahmaputra which flows right through the state. Arunachal Pradesh is the wildest state of India. Arunachal Pradesh has 26 remote mountain valleys and has a culture rich in indigenous tribal traditions that attract travelers to this place.

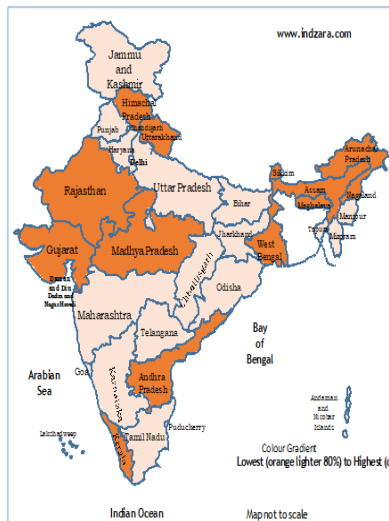


Fig. 1.2: Geographic Heat Map of states with largescaleRural and Natural Tourism in India (Data Source: Ministry of Tourism, GOI). Data used is prior to the bifurcation of J& K in 2019.

In South India, Andhra Pradesh is popular for its mangroves, agriculture, and prominent silk business. Varieties of silk saree

weaving keep the local folks involved. All these make this state a popular tourism destination. In the Western Ghats, Kerala is a storehouse of serene landscapes, backwaters, and tea plantations. The Ghats consist of 18 biodiversity hubs with vibrant wildlife. The eco-tourism destination called Kumbalangi in Kerala is a small island village, the first such initiative to promote rural tourism in Kerala. Next, in the western part of India, the Kutch region is located in Gujarat's Great Rann of Kutch. The area attracts tourists to the artisan villages and the world-famous salt desert is located here. The experience consists of mud huts especially designed to give tourists a feel of living in a village. In the state of Rajasthan, Bishnoi is known both for wild animals as well as scenic landscapes. Indian culture dominates the Bishnoi villages, and the natives are people who live a simple but fascinating life.

5.3. Medical Tourism

Medical tourism or health tourism refers to people traveling from their hometown to another place in search of medical treatment which can be more cost effective, better quality or health services which are unavailable or non-licensed in their hometown. It can be traveling across countries (inbound or outbound) or within a country (intra bound). India has been growing as a major medical tourism destination for other developing countries in the world (Bagga et al., 2020). Fig. 1.3 shows the major states attracting tourists for medical tourism in India. In North India, the capital city of Delhi offers one of the best healthcare facilities in India. Medical services provided in Delhi are Orthopaedic surgery, cardiac care, joint replacement surgery, dental, neurosurgery, preventive health care, cosmetic surgery, drug rehabilitation, various types of transplants and many more. In East India, West Bengal provides institutions like Bengal Tourism and Surgery Assistance India which helps tourists in finding the best doctor hospital combination. In West India, Maharashtra is slowly emerging as a medical destination. The cost of treatment in Maharashtra is lower when compared to Tamil Nadu or Delhi. The government has taken initiatives in assisting foreigners by providing services in India through web platforms.

Among the South Indian states, Andhra Pradesh has Hyderabad which is advanced in the fields of biotechnology and pharmaceuticals. The city of Hyderabad solely has more than 10,000 beds and around 540 hospitals. Close proximity of hospitals to air hubs, affordable accommodation near healthcare centers and easy tourist vehicle availability make it a very convenient destination for medical travelers. In Kerala, the linkage between tourism and hospitals is exceptional. Kerala's expenditure on the medical sector is 9 percent of its GDP which is very high compared to other states. Keeping traditional methods alive, Ayurveda is a major focus in Kerala. The state also offers almost all kinds of advanced treatments and a healing environment for post-treatment recovery. The government of Tamil Nadu is active in providing cost-effective medical treatment. There are numerous state of the art health institutions mainly in the state capital, Chennai. Madurai, Vellore and Coimbatore are some of the other cities offering good medical services. CMC Vellore is known for conducting India's first heart valve transplant. Eye care is one of the fields in which Tamil Nadu specialises. In Karnataka, the cities of Bangalore and Mysore have a number of super-specialty hospitals. Some of them are ISO certified government hospitals. Healthcare services in Bangalore offers a unique mix of yoga, Ayurveda and modern methods of treatment to attract foreign tourists.

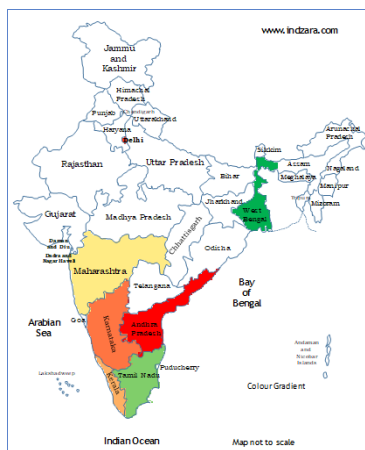


Fig. 1.3: Geographic Heat Map of Top States for Medical Tourism in India (Data Source: Ministry of Tourism, GOI). Data used is prior to the bifurcation of J&K in 2019.

5.4. Historical tourism and Educational tourism

Historical or heritage tourism means people travelling specifically with an aim to explore the history of a place. It includes exploring the local museums with archaic art and literary remains and sightseeing of architectural figures and monuments having historical importance. Educational tourism has learning as the main objective of the trip, be it historical, social or cultural. The synergy of education and tourism provides a practical experience complementing the learning process. Fig 1.4 shows the Geographic Heat Map of top states for historical and educational Tourism in India.

Taj Mahal in Agra, the Agra Fort and Fatehpur Sikri are some of the major places to visit in Uttar Pradesh. Delhi's Red Fort, India Gate, Humayun's Tomb, Jama Masjid and Qutub Minar are renowned not only among Indians but across the world for their fascinating history. Educational trips are arranged for students across India to Jim Corbett National Park, Uttarakhand for its wildlife, Goa for its beaches, Himachal Pradesh for various hill stations and cultural sites. Tourists are attracted to the architectural wonders of the Hawa Mahal, Jantar Mantar and Ajmer Fort in Rajasthan. The Khajuraho temples of Madhya Pradesh reflect acceptance of various religions as it is a group of Hindu and Jain temples. Sanchi Stupa is made with a Buddhist style of architecture. The Gwalior Fort is known for being one of the impenetrable forts of the country.

The Konark temple in Odisha which was built to worship the sun god has 12 wheels at its base which are actually sundials. During the British era, the Gateway of India in Maharashtra was used as an entry and exit point but now is a famous tourist spot. The Ajanta and Ellora Caves are known for their famous rock-cut texture. It is located in Aurangabad known as the tourism capital of Maharashtra. The Ruins of Hampi, Karnataka is filled with historical and artistic mysteries with beautiful structures and carvings. Mysore Palace has intricate ornate designs on its ceilings, stained glass windows and jeweled walls making it look like an actual palace. In Hyderabad, Telangana, the end of plague in the city in 1591 was celebrated by building a monument with four 20

meter long pillars named Charminar. Golkonda Fort is another tourist treasure. The Victoria Memorial in West Bengal is a white marble structure named after Queen Victoria of England, and is a famous tourist spot in the eastern part of India.

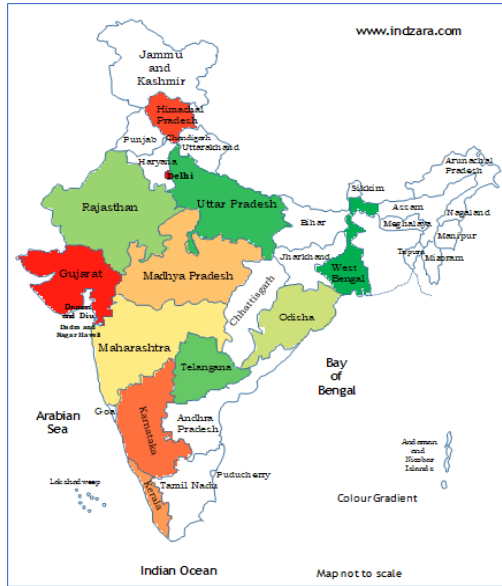


Fig. 1.4: Geographic Heat Map of Major States for historical and educational Tourism in India (Data Source: Ministry of Tourism, GOI). Data used is prior to the bifurcation of J&K in 2019.

6. Policy Discussion and Conclusion

Thus, from the papers reviewed above, one can clearly see that each state can increase their State’s Gross Domestic Product (GSDP) if they focus on the type of tourism that they have a comparative advantage in. Each State government must tap into these areas and expand the existing linkages in tourism to their advantage. This is going to be all the more crucial and challenging in a Post-Pandemic world given that the nature of tourism is changing. The hospitality sector needs to revamp itself to ensure that tourists feel safe after a health shock like the present pandemic. The Tourism industry needs to be further prepared to handle such a health crisis in the coming years since we are part of a highly globalized world.

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