

Shyju P.J. / V.G. Girish / Kaustav Chatterjee / Priyanka Singh

Domestic Tourism Growth in India, Post COVID-19: Perspectives of Tour Operators

Abstract

Domestic tourism in India recorded impressive growth and supported the local economy significantly in the last phase of the COVID-19 pandemic. The extant research on this topic covers the impact of the pandemic and resilience strategies. Still, it leaves a gap in the discussion relating to the service providers' experience in the context of domestic tourism. The present study stems from the absence of empirical research on the trends associated with domestic tourism growth in India post-COVID-19. It examines the trends in domestic tourist behaviour from the tour operators' perspective. It employs a qualitative research design to explore the experiences of tour operators in India. Phone interviews were conducted with 26 tour operators to collect data. A thematic-content analysis is performed to generate themes with the help of Atlas ti software. The findings present the trends, preferences, motivations, and patterns of domestic growth tourism in India.

Keywords: domestic tourism, tourism trends and dynamics, tour operators, COVID-19, India

1. Introduction

With the outbreak of the pandemic in December 2019, one of the major concerns in the tourism discourse is centred on the industry's future. Several studies have discussed the magnitude of the adversity caused by this global health crisis in the tourism and hospitality industry and interpreted its implications in varying contexts. The revival of the industry post-pandemic, mainly due to domestic travel demand, is reported in the extant literature (Christou & Pericleous, 2023; Falk et al., 2022b). Scholars have, in turn, recognized a substantial increase in tourist traffic to natural areas such as mountainous regions (Bhalla et al., 2021; Osti & Nava, 2020), coastal areas (Sohn et al., 2021), and the countryside (Kriaučiūnas et al., 2023; Seraphin & Dosquet, 2020). In the post-COVID-19 era, domestic tourists prefer short trips with family members or friends, and domestic tourism aided the local economy during the crisis (Stacey, 2020).

The research literature elaborates on the recovery of the tourism and hospitality sector from the pandemic. However, critical gaps exist in understanding the dynamic role of domestic tourism, which supported the economy during the crisis. Another research gap identified in the literature is the lack of empirical studies on the perspectives of tour operators. Furthermore, the literature did not feature any scientific research on the revival of domestic tourism in India. Therefore, the present study investigates the evolving trends and new patterns in the development of domestic tourism in different geographical locations to recognise the trajectories of change, and the tourism industry will be in a better position to adapt to such changes in the future. The present study rests on the revival of domestic tourism in India post-COVID-19 (from July 2021

Shyju P.J., PhD, Associate Professor, Department of History of Art, Faculty of Arts, Banaras Hindu University, Varanasi, India; ORCID ID: <https://orcid.org/0000-0002-4512-3923>; e-mail: shyju@bhu.ac.in

V.G. Girish, PhD, Corresponding Author, Associate Professor, Department of Business Administration, The Catholic University of Korea, Bucheon-si, Republic of Korea; ORCID ID: <https://orcid.org/0000-0001-5463-3194>; e-mail: girishcuk@gmail.com

Kaustav Chatterjee, PhD, Assistant Professor (Tourism Management), Rajiv Gandhi South Campus, Banaras Hindu University, Varanasi, India; ORCID ID: <https://orcid.org/0000-0001-8308-1595>; e-mail: kaustav.chatterjee4@bhu.ac.in

Priyanka Singh, PhD, Assistant Professor (Tourism Management), Rajiv Gandhi South Campus, Banaras Hindu University, Varanasi, India; ORCID ID: <https://orcid.org/0000-0002-1095-8170>; e-mail: priyanka.singh4@bhu.ac.in

to July 2022). This paper examines the underlying patterns of the growth trends, customer characteristics and market features of Indian domestic tourism by analysing the experience of tour operators.

2. Literature review

A scoping review has been conducted to understand the critical research themes associated with domestic tourism and the COVID-19 pandemic from 2020 to October 2023. Research articles published from 2022-2023 and indexed in the Web of Science (WoS) have been used for the review. WOS is a popular database cataloguing scholarly academic works (Rodríguez-López et al., 2020). The keywords '*domestic tourism AND pandemic*' and '*(domestic tourism OR domestic travel) AND Pandemic*' identified 218 research articles. After reviewing the titles and abstracts, 59 articles were shortlisted in the second phase. In the final stage, the shortlisted articles were reviewed carefully, and 29 articles were found suitable for the scoping review. Table 1 details articles used in the scoping review with the research focus, geographical region, and authors.

Table 1
Research focuses on domestic tourism

Country	Research focus	Authors
USA	Demographic factors and domestic tourist satisfaction, factors influencing day trips, experience of domestic summer travellers.	Chakraborty et al., 2022
Canada	Tourist behaviour in National Park	Geng et al., 2023
Costa Rica	Domestic tourist behaviour	Moya Calderon et al., 2022
Columbia	Domestic tourist preferences	Camacho-Murillo, 2021
Denmark, Finland, France, Italy, Spain and Sweden	Changes in domestic tourists' summer tourism demand	Falk et al., 2022a
Sweden	Leisure and mobility during the pandemic	Osth et al., 2023
France	Level of regional activity and domestic tourism.	Falk et al., 2021 Lebrun, 2021
Austria, Czech, Germany and Switzerland	Changes in domestic tourist behaviour in overnight stay.	Falk et al., 2022b
Spain , Canaries Islands	Varying factors of domestic tourism demand, preference for environmentally friendly accommodation	Boto-García & Mayor, 2022 Díaz-Pérez et al., 2021
South Africa	Behavioural intention of domestic tourists to visit coastal attractions	Vermeulen-Mltz, 2022
Sri Lanka	Potential economic advantages of domestic tourism to small economies	Wickramasinghe & Naranpanawa, 2023
Vietnam	Behavioural intention and support to domestic tourism	Duong et al., 2022
Malaysia	Purchase decisions- homestays	SPR et al., 2023
Thailand	Resilience of tourism businesses	Tarapituxwong et al., 2023
China	Travel preferences, motivation of domestic tourists, domestic tourism growth, taxonomy of tourist behaviour.	Liu & Choe, 2023; Lv et al., 2023; Fan et al., 2023; Yu et al., 2023, Li et al., 2021
Taiwan	The motivation of urban domestic tourists, older adults, and domestic travel changes travel consumption patterns.	Liu, 2023; Chan et al., 2022
South Korea	Travel decisions, destination attributes, perceived health risk and domestic travel	Lee et al. 2022 ; Ren et al., 2022 ; Wang et al., 2021
Japan	Traffic network and spread of COVID-19, urban mobility, behavioral intention, travel subsidies and domestic tourism	Handler & Tan, 2022 Matsuura & Saito, 2022
Fiji	Domestic tourist travel behavior - baby boomers and millennials	Sharma et al., 2022

The scoping review identified the central themes of research that detail domestic tourist behaviour during the pandemic: tourism demand, perceived health risk and safety, travel motivation, the significance of demographic factors that influence destination preference, mobility patterns, destination environment, cognitive factors

that influence tourist experience at national parks, rural areas, and opportunities for leisure and outdoor recreation. However, no studies related to domestic tourism have been conducted to understand the perspectives of tour operators in the Indian context.

The extant literature also delves into the cognitive and affective aspects of tourist behaviour such as perceptions of risk, travel intention and travel decision (e.g. Han et al., 2022; Girish, 2021a; Sanchez-Perez et al., 2021), industry's response to this crisis and recovery strategy, impacts of pandemic associated with tourism business (Karunaratne, 2021), challenges and opportunities for the tourism industry (Arbulú, 2021; Chen et al., 2023) and essential steps for recovery (Lu, 2021) to sustain and revive the tourism industry.

According to Hall et al. (2020), transformation in the tourism business is just a temporal change resulting from a paradigm shift in people's perception and attitude towards proximity, safety, travel and well-being (Zheng et al., 2021), as well as mitigating responses. The tourism industry adapts to the challenges induced by the crisis (Lew et al., 2020), is always optimistic about the recovery and revival of the tourism and travel industry (Galvani et al., 2020; Havitz et al., 2021), and shows 'adaptiveness and resilience' (Jin et al., 2022, p. 1). Confident about tourism's recovery, Vogler (2022) forecasted a 'retaliatory growth' or 'catch-up travel' post-COVID-19 phase. Singh (2021) predicted the trend of 'quixotic tourism' featured the demand for quick travel and destinations located in exotic settings, and Kim et al. (2022) and Yang et al. (2021) proposed tourism recovery strategies.

Some researchers have reported on domestic tourism and its role in tourism recovery. For example, Jin et al. (2022) examined the scope of domestic tourism to contribute to the recovery of the national travel industry from losses created by the crisis of COVID-19 in China and Arbulú et al. (2021) conducted a study in Spain. Lin et al. (2022) examined how the 'multidimensional distance', which refers to economic, socio-psychological and environmental differences, influences the domestic visitor's choice of destination. Gyimóthy et al. (2022) recognized the crucial role of socio-psychological drivers in affecting the attitude and behaviour of people towards tourism and their destination preferences.

3. Methods

This study used qualitative research methods to achieve the research objectives. Qualitative research techniques have been found highly appropriate for examining the subjectivity of a research area (Braun & Clarke, 2013). Keeping the research questions at the central position, a semi-structured interview schedule was developed to collect the data from the respondents (domestic tour operators). Using the purposive sampling method, 35 domestic tour operators from various geographical regions of India were contacted.

The schedule included four main subjective questions and six related questions. However, additional questions were asked to respondents during the interaction to gain better insight into the study area. The phone interviews were conducted in Hindi and English, each lasting 20 to 25 minutes. The present study used 26 interview transcripts to examine the study objectives, and the necessity to conduct more interviews was not required as the redundant information received from the respondents reflected saturation (Lincoln & Guba, 1985; Vasileiou et al., 2018). The interview transcripts were translated into English in the next phase, and attention was paid to retaining the respondents' original expressions.

Thematic content and co-occurrence analyses were performed to garner the underlying themes and develop the discussion. At the first stage of data analysis, interview scripts were read and reread to understand the meaning and pattern of the study. The meaningful themes were categorised and grouped per coding principles (Friese, 2019; Saldana, 2009) with Atlas Ti (V. 22) as first cycle codes. The second coding cycle is done to categorise the information under specific themes. Atlas Ti enables researchers to identify patterns and the inter-relatedness of themes from a complex set of data (Friese, 2019). The identified codes were grouped

under four themes (i.e., trends, motivation, preferences, and market features). The coding process identified 503 quotations, which generated 116 first-cycle codes. In the next phase, the first cycle codes were grouped under 12 second cycle codes, which contributed to four broad themes.

4. Results

4.1. Trends

General trends (Figure 1) indicate that domestic tourism demand is at an all-time high and started immediately after the COVID-19 travel restrictions were relaxed. The travel frequency of people increased, and a considerable number of pilgrims moved to critical religious shrines. The market size of religious tourism dominated the leisure segment. The trends also indicated that domestic tourism revived quickly after the second wave of the COVID-19 curve flattened:

“The movement of people after COVID-19 is reflected in the domestic tourism market, and most want to visit new places; thus, domestic tourism has increased in northern India” (R 25).

The respondents had a mixed response on the seasonality factor. Tourist attractions are open throughout the year, but hill stations and scenic places at high altitudes are affected by monsoon rains, which causes variations in tourist arrivals. This results in fluctuations in hotel rates in the hill stations of India. According to tour operators, the package rates have increased post-COVID-19.

Tourists also depend on online service providers and aggregators, who offer a better price for packages or package components. Some tourists opt for individual components instead of buying packages. The findings show that tourists want to spend quality time at a destination. Still, the duration of stay at one destination is longer in comparison to pre-COVID-19 days, and many tourists prefer destinations close to their homes:

“We see an increase in group travellers. They prefer nearby places for 3-4 days vacations. They do not want to cover many destinations” (R 5).

Figure 1
Word cloud of general trends in domestic tourism post-COVID



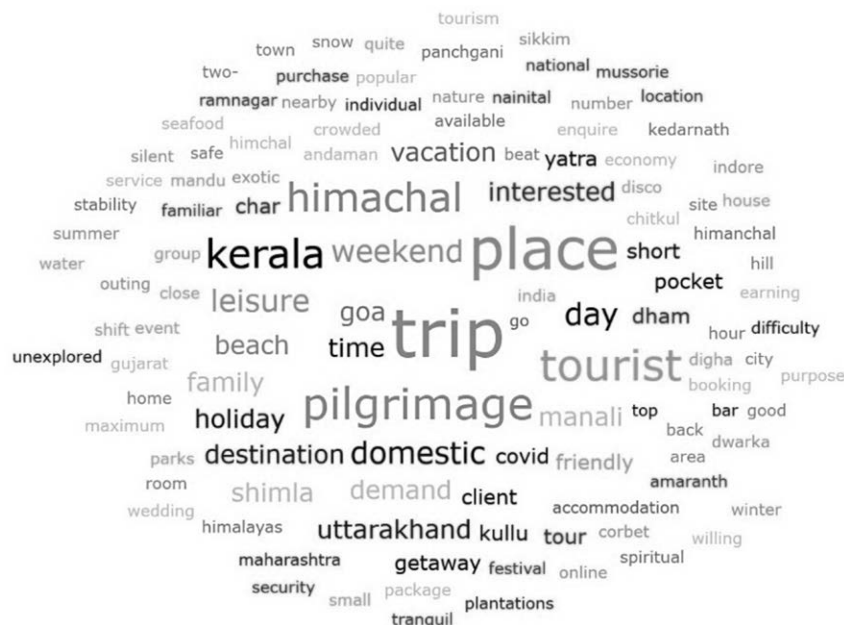
4.2. Preferences

Many respondents wished to visit pilgrimage sites they could not see during the COVID-19 pandemic. Char Dham yatra (covering four pilgrimage sites in Uttarakhand, i.e., Gangotri, Yamunotri, Kedarnath and Badrinath) is in high demand. Tourist demand for popular religious tourist destinations in India, such as Himachal Pradesh, Kerala, and Goa, has thus recorded steady growth:

“During the summer, domestic tourism business was very high, and it was difficult for many tour operators to find hotel rooms for their clients in Kashmir and Himachal Pradesh” (R13).

Long weekends and public holidays are being used for short trips. People travelled with families and preferred pocket-friendly trips immediately after the lockdown rules were relaxed. Places near hometowns and getaway destinations emerged as trendy destinations for tourists. Figure 2 depicts the word cloud of preferences of domestic tourists.

Figure 2
Word cloud showing preferences of people



4.3. Motivation

The surge in domestic tourism post-COVID-19 is mainly due to people's urge to leave their homes. Some researchers (e.g., Girish, 2021b; Wang & Xia, 2021) and media term this as revenge travel:

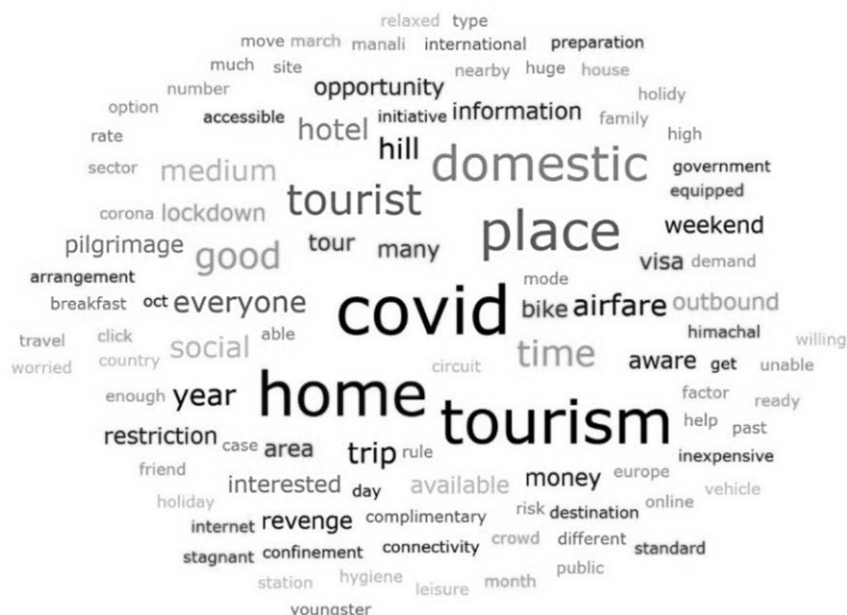
“After COVID-19, many tourists visited hilly areas as the summer was when the lockdown was lifted” (R19).

Another motive of tourists was relaxation from routine life. Restrictions in international travel or long waits for visas altered the plans of many tourists:

“Because of the increase in airfares to international destinations and the waiting time for visas has increased, people prefer visiting domestic areas. For example, it takes two months for Europe and the U.K to get a visa due to ack flow from COVID-19” (R 21).

The word cloud shown in Figure 3 presents the most frequent words of the corpus data.

Figure 3
Word cloud of the driving factors of domestic tourism growth



4.4. Market

According to the respondents, the cost of packages has increased post-pandemic. Increases in fuel costs, transport costs, hotel tariffs and goods and services tax resulted in the total cost escalation. People are willing to pay more for their services, even after the increased cost, but are more conscious of the services than before:

“Packages are getting costly and high because of demand. In a package, we include all costs, such as accommodation and transportation, and nowadays, the price hike in every segment has increased the price of the package” (R26).

After relaxed travel restrictions, high tourist movements to mountain areas and hill stations have been reported. Another segment attracting visitors was pilgrimage sites such as Varanasi, Ujjain, and Utarakhand.

There is a shortage of facilities in many places regarding hotel rooms or transport services. The service providers at various locations were highly conscious about maintaining hygiene at their premises after reopening, employing vaccinated staff and offering required services and facilities to the guests:

“After COVID-19, many hotels were closed, and many properties have not started their operations, which impacted as a shortage of rooms” (R2).

This shortage led to high demand for homestays in places such as Sikkim and Himachal Pradesh. Good relationships with vendors helped agents fulfil the increased demand for accommodation at popular destinations. Domestic tourists were the main customers of the hotels, which foreign tourists once occupied in pre-COVID-19 times. Figure 4 shows the word frequency of the market features as expressed by the respondents.

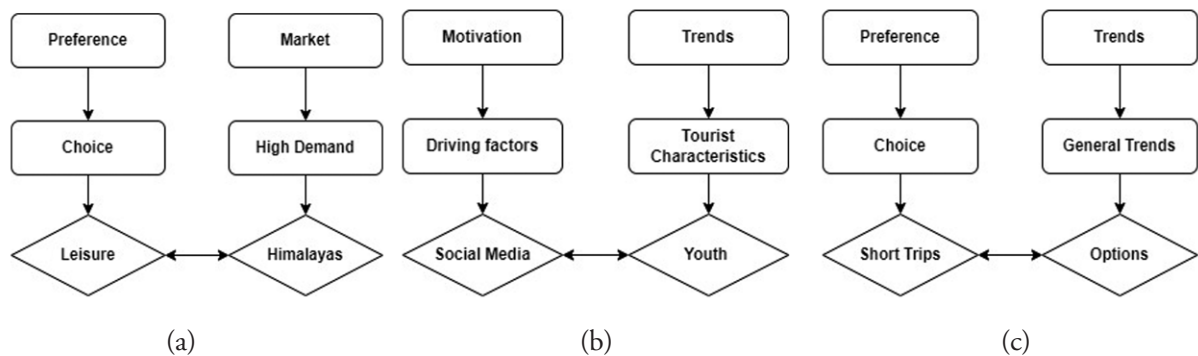
Figure 4
Word cloud of market conditions in domestic tourism



4.5. Code co-occurrence analysis

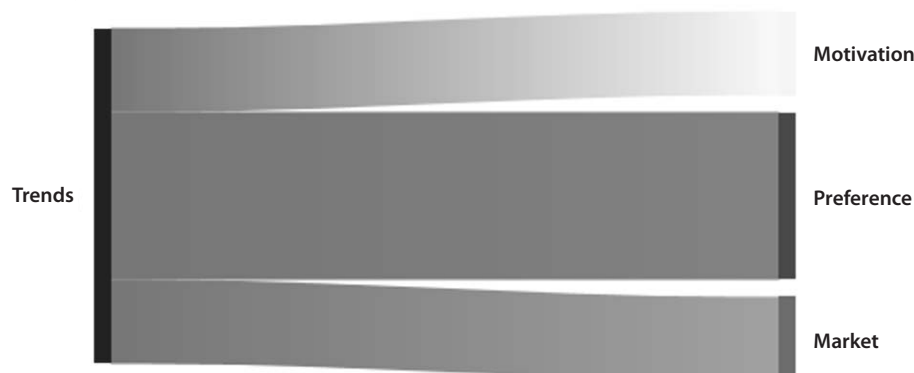
The code co-occurrence analysis using Atlas Ti assisted the researchers in exploring the relationship between the two codes (Figure 5).

Figure 5
Co-occurrence diagram



The co-occurrence diagram reveals that there exists a strong relationship between leisure and the Himalayan region: (a) The prime choice of the people was the Himalayan region, and there was high demand for such holiday destinations in the market; (b) social media was one of the driving factors of tourism growth post-COVID-19; and (c) The third diagram depicts that people generally preferred short trips. The interrelationship of these themes is shown below as a swanky diagram (Figure 6). Themes such as motivation, preferences and market are significantly related to the trends.

Figure 6
Swanky diagram



5. Findings and implications

5.1. Findings

The thematic analysis identified four themes that reflect behaviour: trends in the market, preferences, motivations, and market structure. The trends show that short trips are increasingly popular in domestic tourism. People prefer short trips on weekends. Tour operators that had earlier (pre-COVID-19) specialised in inbound operations switched their focus to the domestic tourism business. Another significant finding is the increase in the paying capacity of domestic tourists. The trending destinations included religious sites and natural attractions.

Increased tourist traffic to pilgrimage sites, natural attractions, national parks, and wildlife sanctuaries provided business to hotels, homestays, and transport operators. Domestic tourism supported the local economy and helped to revive India's tourism industry at a national scale. The current study's findings are consistent with the prior research of Hall et al. (2020) and Stacey (2020). Pilgrimage sites all over India reported substantial increases in pilgrim movements. Places such as Haridwar, Rishikesh and the shrines of the Himalayan foothills attracted visitors because they also offered opportunities for rejuvenation (Garg et al., 2021). High tourism demand was reported during the summer months (May-June), which people considered for holidays and annual trips. National or local festivals (Diwali, Christmas, New Year and Holi) and extended holidays also increase tourist traffic to popular sites.

Domestic tourists tend to spend more now on accommodation and quality services. Exotic beach destinations such as Goa and Digha continued to attract domestic visitors. However, new concepts such as work from mountains, staycations and workcations were also in demand. The consumption pattern of aristocratic families did not change as their brand preferences remained stronger. One of the highlights of this study is the finding concerning the consumption pattern of domestic tourists, whose spending power is now considerably higher, and they expect a quality service environment and ambience. This chronicles the emergence of a robust middle class and their interest in visiting natural attractions and offbeat locations, boosting domestic markets.

Another segment consists of pilgrims who visit religious sites and participate in yatras (pilgrimages). This finding follows the research of Manhas and Nair (2020) on the influential role of religious tourism. The urge to travel to scenic places is reflected in the high inflow of tourists to Kashmir, Uttarakhand, and Kerala. The leisure tourism segment clustered around natural attractions in India, primarily the Himalayan regions, coastal India, national parks, sanctuaries, and biosphere reserves. The religious tourism segment spread heterogeneously across India, where all states have several pilgrimage sites. Pilgrimages also involve a certain degree of adventure, as many sites are situated at high altitudes and remote terrain.

The pandemic reinforced the intense desire among people to take a break from their routines. Kusumaningrum and Wachyuni (2020) argued that the travel intentions of the people would not change, and the need for fun and recreation will remain one of the core drivers of tourism. Post-COVID-19 travel featured frequent and short trips rooted in risk aversion (Li et al., 2021), as long-distance travel comparatively involves more physical risk. The study underlines the scarcity of hotel beds at significant tourist attractions in India. Hotels adopt premium pricing policies during peak demand and can earn huge profits, which is acceptable as many hoteliers incurred losses during the pandemic. Service providers explored all possible opportunities of social media to stimulate travel desire among the people.

The post-COVID-19 customers are more aware of destinations than ever before. The new-age customer is highly conscious of hygiene standards as the pandemic introduced a new set of hygiene norms in the hospitality industry (Ivanova et al., 2021). The demand of customers varied according to the geographical region they belong to. Further, the study shows that tourists are highly conscious of how they spend their money on a vacation. Tourists' activities are influenced by several factors, such as age, interests, passions, exposure, previous experience, buying power, peer groups and so on.

Furthermore, one of the significant findings is the resilience of the domestic tourism market in a challenging situation. Domestic tourism was not considered essential to the Indian economy in pre-COVID-19 times. Before COVID-19, outbound and inbound tourism was the favourite segment for tour operators. However, COVID-19 changed this perspective, and the domestic tourism market has emerged as a promising growth segment.

5.2. Managerial implications

Changes in tourist behaviour indicate a potential opportunity for destination management organisations. The study reflects that tourists prefer spending more time at one destination than covering multiple destinations. Tour planners should note domestic tourists' growing interest towards mindfulness (eudemonic factors) while designing the travel experience. Our study recommends that operational managers of tour companies should look beyond the conventional pattern of visitation and attempt to explore the new business opportunities around long weekends and minivacations. Accordingly, using social media for effective marketing (Kriaučiūnas et al., 2023) to reach out to the emerging domestic market is necessary.

Managers should work on identifying niche destinations catering to the needs of the millennials and Generation Z, whose preferences are religious adventure sites in the Indian context. In addition to the above, exploring the local cultural features and engaging visitors with the local cuisine and markets can provide a unique travel experience to domestic tourists. The market size of brand-conscious and affluent tourists who prefer to live in the bubble of their comfort zone is increasing rapidly. Organisations focusing on niche market segments can research this area extensively and develop appropriate product offerings. Under these circumstances, ensuring quality environments is a prerequisite for tour operators focussing on the high-end domestic tourism segment. Although tourists have multiple options for choosing their service provider to finalise a tour programme, service quality and ensuring confidence among tourists can be decisive factors in winning customers' loyalty.

Managers may adopt appropriate strategies and work with other stakeholders in tourism to sustain tourist traffic. Assessing staycations' popularity and acceptance level across geographic and demographic segments is essential. Learning from the post-pandemic situation, tourism organisations must realise that crises immediately impact the tourism and hospitality industry. The pandemic exposed the gravity of the impact at the global level, but the recovery of tourism business was initiated locally. Progressive countries worldwide emerged as the solid domestic tourism market at the last phase of the COVID-19 pandemic. Reflecting on the post-pandemic tourism scenario, it is evident that organisations that were prompt enough to respond

to the crisis-stimulated customer needs could manage to survive the crisis. Hence, top management should consider enhanced organisational performance in terms of adaptability to any anticipated crisis.

The study aligned with domestic tourism trends post-COVID-19 and its recovery, but adding the quantitative research design can further validate the current findings. Secondly, the subjective findings reflect the broad view of industry experts. Hence, a micro-impact assessment at the regional and destination level can yield better results in future research. Future research could explore the nature of tourism demand in specific markets according to demographic factors, which can help tourism business organisations adopt appropriate business strategies.

6. Conclusions

This study examined the trends and growth patterns of domestic tourism in India from the tour operators' perspective. The research recognises the growth of the domestic tourism segment as an essential component of the tourism business, which can sustain the challenges of crises of various kinds, even one as significant as the COVID-19 pandemic. The enthusiasm of people to travel out of their home base is induced by nostalgia and the need to escape from the stress caused by the pandemic. As a result, travelling on weekends and long weekends has slowly become a part of the culture of the citizens of India.

The findings reported on the underpinning themes in four broad areas: trends, motivation, preference, and market features. The study revealed the dynamic nature of the domestic tourism market and opportunities for a vast country like India, where the size of the population will play an ever more critical role. India, being a fast-growing economy in the world, the domestic tourism market segment is yet to explore its full potential. Hence, the perspectives of tour operators have a great significance on the demand, supply and consumption patterns of domestic tourists.

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Submitted: October 31, 2022

Revised: March 09, 2024

Accepted: March 22, 2024