

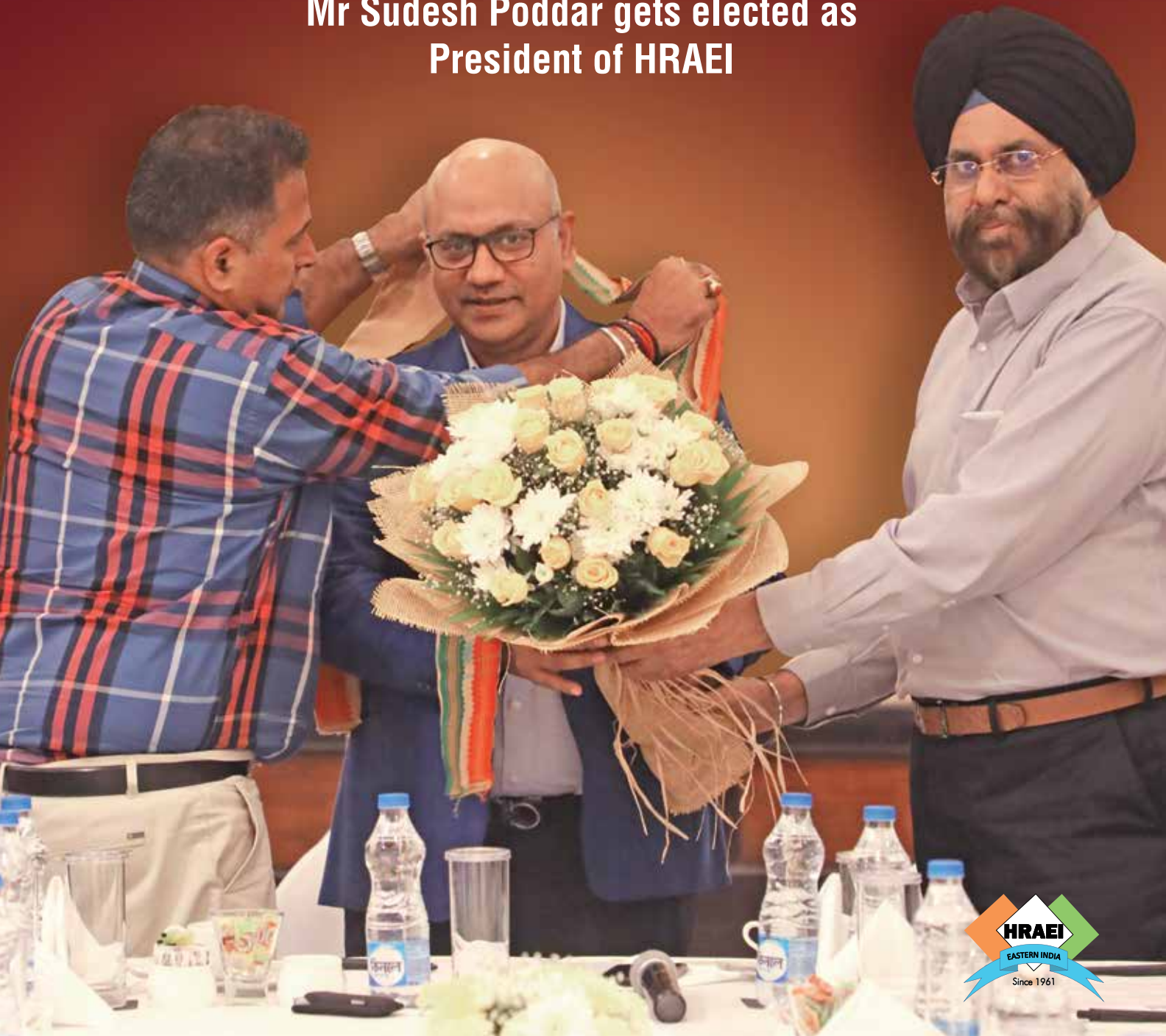
MYSTIC EAST

...an unexplored horizon

A Bi-monthly Magazine by HRAEI | Vol 7 | Issue 6 | November - December 2021

AT THE HELM, AGAIN

Mr Sudesh Poddar gets elected as
President of HRAEI





VISION

- ✌ Make the Eastern Region comprising 12 States and a Union Territory a flourishing destination for domestic and foreign tourists by projecting their captivating tourism assets.
- ✌ Promoting best industry practices and setting benchmarks for industry constituents.

MISSION

- ✌ A common voice for hotels, restaurants and associates for unhindered progress of the hospitality industry in the country's Eastern Region.
- ✌ Create value for members by ensuring government policies remain supportive of tourism and the industry.





A

At this moment, the biggest challenge is the emergence of the new Omicron variant of the Covid-19 virus in African nations. A slew of nations in Europe, Asia and North America have banned flights from Africa--believed to be the origin of the variant. The WHO, however, warned against countries hastily imposing travel curbs, saying they should look to a "risk-based and scientific approach". For instance, South Africa raised objections stating that bans would not be effective in preventing the spread of the variant, it would rather damage economies. The health authorities in the country claimed that most of the infected in the country are those who did not get their vaccines or did not wear face coverings in public. The country, living with the variant

“
Tough mask-discipline, social distancing and full vaccination will keep everyone safe

”

for nearly a month, restricts indoor gatherings to 750 people and outdoor gatherings to 2,000 people. Other countries should follow these strictures, rather than banning flights or movements crossing borders.

Several states in India--such as Maharashtra, Gujarat and Karnataka-- have made a slew of measures to make sure the Omicron variant can be controlled. They are going for genome sequencing of the virus, re-introducing RT-PCR tests and mandatory quarantine for those travelling from abroad.

Since complete ban may impede economic resurgence of the global economy, the correct path is to toughen the mask discipline and understand the importance of social distancing and full vaccination of staff in the travel, airline and hospitality industry.

Mr Sudesh Poddar
President, HRAEI



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Placing tourism & hospitality in the Concurrent list will facilitate seamless coordination

The inclusion of tourism in the concurrent list is the result of the collective efforts of members and stakeholders recently. We have been appealing for this for quite some. The move, at this time, is expected to help the sector battered by the ongoing Covid-19 pandemic. Let's hope it is implemented quickly.

The proposed measure will provide a level playing field to all the hotels which have been badly hit by the ongoing covid-19 pandemic. Tourism activities and products differ from state to state. Placing tourism in the Concurrent list will facilitate seamless coordination. This will perhaps increase the quick implementation of schemes and pan-India face of Indian tourism.

This move will allow both Centre and the states to formulate policies that could benefit the sector which has faced severe setbacks in recent times. Like other subjects on the Concurrent list, it will enable the Centre to bring in harmonious policies for betterment of tourism in consultation with the states.

Once implemented, this will also play a key role in post-covid recovery.

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Vol 7 | Issue 6 | November - December 2021

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'Mystic East' magazine is printed and published by Atikram Gupta on behalf of Hotel and Restaurant Association of Eastern India.

Printed at CDC Printers Private Limited, No.45, Radha Nath Chowdhury Road, Tangra Industrial Estate-II, Kolkata, West Bengal 700 015

Hotel and Restaurant Association of Eastern India, 18A/1, Everest, 18th Floor, 46C, Chowringhee Road, Kolkata- 700 071;
Telephone- +91 33 2288-1742/43, 40035993.
E-mail: info@hraei.co.in
Website: www.hraei.co.in

THIS ISSUE OF MYSTIC EAST CONTAINS 56 PAGES INCLUDING COVER AND BACK COVER

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Industry status will benefit the hospitality sector in a big way

Our association (HRAEI) has been urging all state governments in the region to grant industry status to the hospitality sector which has been severely hit due to the pandemic. The industry status will benefit hotels to get electricity and water tariff at a cheaper rate, lower property tax and license fees. Especially power tariff has been a big burden, with little revenue due to prolonged lockdown and restricted movement of customers.

States of Maharashtra and Karnataka have granted industry status to certain hotels. With the status in place, eligible hotels will be charged at industrial rates for power supply, water supply, taxes and dues instead of the commercial rates that are currently applicable. There are only 110 hotels, ranging between one to five stars, classified by the ministry of tourism. In Karnataka, the new rules are applicable to hotels registered with the Centre's Tourism Ministry. Tax concessions are provided to star hotels for a five-year period. There are only 62 star hotels in the State.

The move by these states is certainly a welcome move, and will immensely benefit some hotels. But it would have been better if the facility had been extended to all hotels. HRAEI urges all state governments in the region to follow in the footsteps of these states and go beyond the norms of classified hotels.

Mr Pranav Singh
Honourary Secretary

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AGAIN**

Mr Sudesh Poddar
gets elected as
President of HRAEI



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Travel & Hospitality sector hopes this is not the beginning of another setback



INDUSTRY seeks more clarity from govt; travellers haven't cancelled bookings, but situation fluid

The travel and hospitality industry is hoping that a new Coronavirus variant of concern and developments such as the government's decision to review the move to relax international travel curbs, new inter state guidelines, rising Covid-19 cases in some countries in Europe and subsequent lockdowns will not upend the promising recovery made so far.

"The world is in a state of flux and nobody knows what's going to happen. Nothing indicates bookings will fall for now, but no one knows what this is going to do. We will probably get more clarity in a week. We are also awaiting more details from the government," said the chief executive of one of the Indian hotel chains that bore the brunt of the panic triggered

in the stock market on Friday following fears of the new Omicron variant and fresh travel curbs.

While travelers are not panicking or cancelling bookings just yet, the situation is dynamic and companies are seeking more clarity, industry insiders said.

"I think the government is still deliberating on the decision (on international flights) and we have not heard anything officially on the matter. We are hearing that people from certain countries might need to follow more stringent rules and protocols. It will be almost two years and people would be reluctant to cancel trips now. I don't think countries are going to shut borders indiscriminately. People are not cancelling plans just yet. We are all waiting and watching," said Jyoti Mayal, president of the Travel Agents

Association of India (TAAI) that had been appealing to the government to resume scheduled commercial international flights.

Following prime minister Narendra Modi's directions to review plans of easing international travel curbs on Saturday, the @PIBHomeAffairs account tweeted on Sunday that the decision on the effective date of resumption of scheduled commercial international passenger services will be reviewed as per 'evolving global scenario'.

"Closer watch on emerging pandemic situations within the country will be maintained," the tweet further stated. On Friday, India had announced the resumption of regular international flights starting December 15 for the 'not at risk' countries.

Besides the UK, more countries such as Germany, Italy, Belgium, Netherlands and Hong Kong have detected the B.1.1.529 Omicron variant.

Indian states such as Karnataka and Maharashtra have issued new guidelines following concerns.

Rajiv Mehra, president of the Indian Association of Tour Operators (IATO) stated that the association is with the government on the issue of health and safety of the countrymen, however, banning flights is not the solution. "We can increase the screening at the airports, and anybody found infected after testing should be quarantined. The thrust should be on having fully vaccinated people travel and within our country too, we should raise the vaccination percentage," he added.

Indians still prefer domestic destinations over foreign ones



Glance - one of the largest lock screen content platforms of India and Southeast Asia, surveyed to understand the travel landscape in 2021-22 and various preferences of its users who desired to travel. The 'Glance Spotlight on Travel 2021' Report revealed the emerging consumer sentiment and growth trajectory of the travel industry in 2022. Travel has seen a major increase in the past few months as restrictions are lifted and more people are willing to step out to visit new and old destinations.

Decoding these shifting travel patterns and emerging consumer behaviours, the Glance report highlighted that Indians still prefer domestic destinations over foreign ones as domestic travel has taken

precedence post pandemic.

Younger audiences are the most eager to travel with 56 per cent within the age group of 18-30 actively planning trips. December 2021 will witness a travel surge, with 46 per cent of respondents planning a trip to at least one destination. The most preferred type of vacation is a family vacation. They outpace solo travel or trips with friends at 37 per cent. Shorter durations for the trips are the norm as 54 per cent of respondents stated their planned trips to be of less than a week. It is also observed that beaches are the most preferred, with 22 per cent of respondents wishing to travel to sea-side destinations.

For transport, flights are most

popular as 48 per cent of respondents have stated they would rather take them than other forms of transport.

There's been a spike in the preference for homestays with unique experiences at 32 per cent. According to the report, most users are looking for lucrative travel packages, especially if it includes flight and stay. Other findings through the survey reiterated the rise in shopping before travel. The survey also revealed that 49 per cent of respondents have pushed their travel plans to next year H1 – 2022 making it the most favorable time for the travel industry. The futuristic outlook for the travel, hospitality, and aviation industry looks positive as they enter the new year.

Long weekend trips emerged as the most popular travel trend across geographies

TRAVEL is back in a big way and consumers are excited to make up for lost holidays over the past two years. With a steady rise in vaccination coverage across geographies, combined with the easing of restrictions across regions, travellers have embraced the spirit of travel wholeheartedly, especially during holidays and festive long weekends in India, the US, the UK and Europe. As per OYO's booking analysis, consumers across the world are increasingly opting for short-haul destinations and making last-minute bookings over planned trips.

In India, the long weekends of Gandhi Jayanti and Dussehra were ranked as the topmost holidays for travellers in 2021. Across Europe, summer travel saw the highest bounce back in demand. Whereas, Americans travelled the most during the Labor Day long weekend of September 4 - 6, 2021. For Indians, festive long weekends are nothing less than sweet escapes.

In India, some of the most popular holidays for travellers took place in the second half of this year, starting with Janmashtami in August, followed by Ganesh Chaturthi. Vaccination coverage and the opening up of several states for tourism in comparison to early 2021. Indian travellers preferred spending their holidays across tourist destinations such as Jaipur, Goa, Visakhapatnam, Kochi and Udaipur during the festive season.



Interestingly, short-haul destinations continue to be the go-to option for travellers across the country over long weekends. Some of the top short-haul destinations are Lonavala, Pondicherry, Shimla, Mysore. All of these destinations sit close to mainstream cities of Mumbai, Chennai, Chandigarh, Delhi and Bangalore, indicating that city folks are looking for respite closer to home.

The long weekend of Dussehra saw a hike in demand, with an increase in trips to nearby destinations for a quick break. In India, last-minute bookings continue to be on the rise. Not surprisingly, Indians travel to destinations known for their festive cheer. During a festival, the preference for destinations well-known to celebrate the festival with great vigor witnessed a spike in bookings.

North-East can become a hub of world tourism: Neiphiu Rio



THE North Eastern region of India was eminently capable of becoming a hub for world tourism according to Neiphu Rio, the chief minister of Nagaland. Rio spoke about this while addressing the inaugural session of the 9th International Travel Mart for the North East region organised at the aegis of the Ministry of Tourism, Government of India in Kohima this weekend. He said the north east of India had the capability to become the centre of world tourism with its rich cultural wealth and fascinating natural beauty. He hoped that the travel mart would help formulate innovative ideas to harness the true tourism potential of the region.

Appreciating the presence of Am-

bassadors and High Commissioners of countries in SE Asia like Thailand, Myanmar, Vietnam, Brunei, Malaysia at this year's event, the chief minister said that it sent a positive message and the right intent.

Talking about the tourism sector, the CM said that it is one of the worst hit sectors during the global pandemic and therefore the ITM will act as a platform for stakeholders to discuss plans to revive the sector and put it back on track.

Welcoming ITM guests to the historic city of Kohima which had many monuments and war memorials associated with WWII, Rio said that Nagaland was known beyond its

pristine natural beauty and the ethnic tribal culture.

Mentioning the Hornbill Festival which took place recently, Rio said it was the festival of festivals in Nagaland which gave local people the opportunity to engage with the world outside and introduce their unique festivals to the world. The CM said that the Hornbill Music Festival had become a glamorous event by now and attracts a lot of foreign guests to Nagaland.

Around 300 delegates from different parts of the country and the region participated in the two-day ITM 2021. This was the first edition to take place in Nagaland.

Nagaland's wildlife gives the State enough opportunities for better tourism: Ajay Bhatt, MoS tourism



A JAY Bhatt, the minister of State for tourism and defence, has said that while the northeast as a whole has immense potential to make rapid strides in tourism, States like Nagaland can explore opportunities in wildlife and border tourism.

Bhatt was addressing the media on the sidelines of the inauguration of the 9th international tourism mart for the northeast in Nagaland's capital Kohima.

He also said that the Central Government is committed to improving the connectivity to all areas including

the remote border areas which will ultimately foster tourism, mentioning the road connectivity to Mansarovar, Umling La, etc. The minister added that around INR 193 crore has been allotted for Nagaland alone under Swadesh Darshan and other schemes under tourism infrastructure development in the last seven years.

Arvind Singh, the tourism secretary, Government of India also highlighted the immense potential for tourism in the northeastern regions of India, especially in the eco-tourism segment.

He said that it is the first time that

the Ministry of Tourism has invited 50 university students from different parts of India for a study tour to Nagaland as part of ITM. He said the initiative is intended at enhancing knowledge about the region in the young generation. Around 50 buyers will interact with over 70 travel sellers of the northeast at the two-day travel mart.

Ambassadors and high commissioners of South East Asian countries such as Vietnam, Malaysia, Brunei, Thailand, Myanmar are also participating in the event.

Tourist footfall to Bodh Gaya likely to increase soon

VIETNAM'S Ambassador to India, Pham Sanh Chau, has expressed hope that footfall of domestic and international tourists to Bihar's Bodh Gaya will increase soon. The Mahabodhi Temple, a UNESCO World Heritage site, reopened on August 27 after remaining closed since April this year due to the Covid-19 pandemic.

Addressing members of Bodh Gaya Temple Advisory Board (BTAB) on

Saturday, he said, "The Mahabodhi Temple is a matter of pride for the people of Bihar. Bodh Gaya is one of the most important Buddhist pilgrimage centres in the world. We are quite sure that footfall of both domestic and international tourists will increase in time."

Ambassadors and consulate generals of the embassies of Bhutan, Thailand, South Korea, Myanmar and Sri Lanka also attended the BTAB

meeting which was chaired by the Vietnam ambassador. The previous BTAB meeting was held on November 22, 2019. "Issues such as security and development of Mahabodhi Temple and tourist facilities, promotion of tourism and increase in pilgrim footfall to Bodh Gaya, and air connectivity with Buddhist countries were discussed in the meeting," a senior official of the Bihar government said.



TRENDS IN DESIGN

How hospitality design and architecture is going to change in a post-pandemic world



THE pandemic has turned the hospitality sector upside down. As parts of the world are gearing towards welcoming tourists once again to their countries post the pandemic furore, there must be alterations made to the existing hospitality designs as hotels and restaurants should re-open adhering to safety rules issued by WHO.

Hospitality design is awaiting a revamp to accommodate people

safely and many think that the WHO released rules and regulations on public conduct during the pandemic might become mandatory codes to be followed in design and construction. Buildings belonging to the hospitality sector should meet social distancing and hygiene requirements as they are meeting points for people from all over the world.

One of the recent changes has been the check-in experience. Many

hotels have shifted towards contactless check-in and we believe we will continue to see this evolve. We may see options in the future where there is the ability to self-check-in or to check-in at the front desk, depending on guest comfort. Hotel owners may also begin to implement the use of body scanners, temperature checks and sterilization stations throughout a hotel.

From a design standpoint, we will



begin to see an evolution in lobby design so that guests feel comfortable from the moment they enter a hotel. One way that hotels are doing this is through the reconfiguration of furniture. We may see deeper design changes in the future that will aid in ensuring guests feel a sense of comfortability and security gathering in these spaces.

Another design change—that will likely depend on the climate and

geography of a hotel—is that more amenities will move outdoors. We started to see this a bit already with restaurants. Many hotel restaurants that have traditionally been indoors will incorporate more open kitchen concepts and outdoor wait stations. For those located in colder climates, hotel restaurants will incorporate larger spacing between tables, individual serving plates versus buffet-style operations, and lighter linens, which provide a cleaner look and feel to guests. We will also see a shift away from traditional menus to touchless virtual menus.

In times of crisis, it often sparks innovation. We are confident that the current environment will force industries to find new ways of doing things that often result in better outcomes for guests and consumers.

In the short term, there will be a continued focus on social distancing and health protocols. That said, over the long-term, we believe that we will see innovative strategies that marry the need for socialization and guest experience with the needs of the new normal.

One thing that has become extremely evident throughout the pandemic is we are programmed to socialize and build connections. This is why community and gathering spaces will still be in demand post-pandemic, they will simply be reimaged.

For example, outdoor gathering spaces will likely be larger in proportion to indoor amenities. There will be a continued shift toward blurring the line between indoor and outdoor, a trend that has been accelerated by the pandemic. These outdoor spaces will be enhanced by adding items such as fire pits, heating towers that encourage fresh air flow, etc.

We will see less clustering in the overall designs and hotels may incor-

porate some sort of check-in process to manage the number of people at one time, all of which contribute to guests feeling safe and also providing the ability to gather and socialize.

The design and operation of elevators within hotels are also evolving. Rather than encouraging more occupants with multiple stops, elevators will allow guests to input the desired floor first where the elevator will come to the guest and take them directly to the requested floor.

Some trends seen in post-pandemic Hospitality Design are as follows:

1. Contactless Check-in Points

Check-In Counters and Reception Counters are the first points of interaction in hotels and restaurants. Several design connoisseurs have proposed to design and develop contactless check-in points to prevent possible threats to public health through the interactions of staff and guests. Installation of Hotel Apps and Smart technologies are encouraged in a bid to minimize human interaction. Other methods of lowering interaction include touch-less temperature counters, doors that open with smartphone applications etcetera.

2. Hygiene Perception and Procedures

Reminders about hygiene and public health safety placed around hotels and restaurants in the form of signages are encouraged and easy to clean surfaces can help maintain the sterility of the environment. For example, hard surfaces and non-porous flooring is easy to clean. Automation in the interiors and structure helps to propagate non-touching functionality in hotels and restaurants. Automatic Sliding doors, Sensor enabled faucets and flush systems, etcetera, promotes hygienic and touch-less design.

3. Distanced Dining Experience

Development of new configurations of dining layouts in hotels and restaurants is required. Physical separation within interior seating areas that feels intentional and subtle helps to practice social distancing within restaurants.

There is no future for a buffet dining experience at restaurants and hotels. Customers may not find the idea of a buffet appealing as the meals may get exposed to airborne particles.

Distancing codes must be in place in the food preparation area, the food staging area, and a completely separate dish-washing. Designers and supervisors also should keep in mind the procedures of disinfection, food preparation and food handling while designing the layout of the kitchen.

4. Pandemic-Ready Airflow Systems

The outbreak of the pandemic has affected how people perceive the use of the HVAC system, especially since the virus is airborne. Studies show that HVAC systems enable transmission of the virus from person to person, especially in closed-off spaces like a restaurant or a café.

Many companies have already produced Pandemic Ready HVAC systems that can block the spread of the virus by regulating the room pressure levels. The idea of using high calibre airflow systems in hospitality properties, might not be economical but is safe and will be a new trend that will ensure people's health and well-being.

5. Functional Outdoor Areas

Hotels can create outdoor spaces that the guests can use safely abiding the social distancing rules. Hotels and restaurants can integrate outdoor



seating opportunities in addition to the indoor seating available. Use of shading devices, passive cooling and warming techniques etcetera to stimulate outdoor seating space is permitted.

Outdoor spaces can also double as outdoor dining areas in addition to the indoor dining areas. Hotels can transform outdoor spaces in the form of outdoor fitness centres, socially distanced yoga and dance centres etcetera.

6. Rethinking Space Requirements

An ideal post-pandemic hotel suite will feature bed, bath, wardrobe, minibar, delivery hatch, workspace and gym and, transformable into a self-contained isolation room. The design firm 'The Manser Practice' uses the term 'Utility Pod' to describe the hotel room.

To practice social distancing vigorously, designers recommend installing partitions made of plexiglass that does not hinder humans visually. These partitions will come handy in protecting staff and guests from the virus and the design of the wall partition can be aesthetically pleasing to complement the interior design of the hotel or restaurant.

Proposals for having remote-activated delivery hatches in hotel suites have also been doing its rounds. The delivery hatches will help prevent staff from entering rooms and will also reduce the guests' need to visit restaurants. Use of delivery hatches to deliver laundry and other items is another utility it provides and, thus ensures privacy as well.

7. Safe Navigation

Designers are putting forth proposals to enable structural changes in existing hospitality sector buildings. Walkways should direct people to practice one-way movement to avoid congestion in public areas such as corridors. The design firm 'The Manser Practice' thinks the 'Paternoster Lifts' can replace the existing 'Closed Lifts' to avoid overpopulation as these lifts typically comprise a chain of open compartments for one or two people.

The hospitality design post-pandemic will feature a lot of technological inputs. Smart technology in hotels and restaurants will help create a safe and sound environment for staff and guests. Artificial Intelligence will play an important role in the design of hotels and restaurants as contactless service will be received well by guests in the foreseeable future. Modular interiors will help maintain adaptability in hospitality design. Post the pandemic several changes may occur in the design codes followed in hospitality design.

INTERVIEW

The bounce back after the second wave is remarkable

In September 2019 the Accor group announced the appointment of Nitin Pathak as the General Manager of Novotel Guwahati GS Road, a 10-storey building with 118 rooms, located at the heart of the city.

Pathak brings almost 18 years of hospitality experience to Novotel's inner circle. Prior to Accor hotels, Pathak was associated with Citrus Hotels Pvt. Ltd as Regional General Manager – South Central. Pathak started his career with Taj Group of Hotels in multiple locations and varied capacities. His most recent assignment was with Novotel Pune as General Manager and prior to that with Ibis Gurgaon, where he served as the General Manager for 2 years.

Pathak is known to be a strategic manager, with an astute business sense, an entrepreneur to the core, with a knack of people management whilst delivering the highest standards of service for all stakeholders, internal as well as external.

Recently he spoke to Mystic East in an exclusive interview. Excerpts:

How has your hotel coped with ever since Covid-19 broke out?

At Accor, safeguarding and taking care of others is at the very heart of what we do and who we are. We created and implemented a plan to cope up



Nitin Pathak, General Manager of Novotel Guwahati

with the pandemic when it broke out in March 2020. The top three priority areas in the given order were safety and security of all stakeholders including staff and guests, preserving working capital with a business continuity plan and helping the community with best of our capacities. For the initial six months, we focused on our

staff's safety and security, stationed a skeleton staff at the hotel and limited the hotel operations. Before reopening completely we created and implemented a plan to prevent transmission in consultation with local government and health authorities and ensured to get certification for Accor's global cleanliness and prevention standards



program ALLSAFE. We also created and implemented a business continuity plan for 2021 by filtering the right business, services and product on offer. Accor fosters sustainable social and economic development, and supports communities, wherever they work. Carrying the same commitment we worked with our local partners like Robinhood Army and others to support the needy in these difficult times.

What are the innovations you introduced to buck up ancillary revenue streams during the period? Do you wish to continue with these innovative ideas?

There's a lot of talk in the industry right now about ancillary revenue streams, particularly outside of rooms. F&B vertical is also witnessing commendable innovations and creativity across the industry. However, at Novotel Guwahati we utilized the dull period for building guest's confidence through transparency and making this information

available to the end user at the time of first connection or booking. We worked on all existing & additional services which were relevant to the market and sustainable over a long period of time keeping the profitability in mind as everything comes with a cost. We leveraged our presence in 20 Indian gateway cities with corporate level digital initiatives like Vivah, Dawat & Shagun by Novotel. This unique digital initiative kicked off very well and has great business potential post Covid-19 as well. We also focussed on loyalty and experience to drive direct bookings and on good old service and on-line reputation. Feedback and ratings from previous customers remain critical for any hotel to drive repeat business — and influence new business.

How has the situation changed after the hospitality industry was gradually unlocked?

What interests just about everyone is the direction and velocity of recovery,

every state is recovering at a different pace. With the ease in travel restrictions and unlocks, many of the leisure destinations saw a huge influx of leisure travelers. Corporate travel has also started with caution. Going forward, the domestic market will be a key driver in coming months, we will continue innovating and experimenting in the F & B space as well. Overall, it would be imperative for the industry to strike a balance between safety & security of employees and guests, asset management, revenue and cost discipline.

Did you get any support from the government in the tough times? What are your expectations from the government?

The Indian hospitality industry is undoubtedly one of the biggest casualties of the COVID-19 outbreak as demand declined to an all-time low. Global travel advisories, suspension of Visas, imposition of Section-144 (prohibition against mass gatherings), India like most other countries was on a lock down, the ramifications of which were unprecedented.

I am of the opinion that the government did a commendable job in containing and fighting the pandemic in Assam given the magnitude and devastation the pandemic created worldwide. As a part of the hospitality industry and as a business owner, my expectations were around monetary support (subsidies in HLP cost and assistance with working capital), fiscal support (corporate tax holiday to travel & tourism and defer statutory dues), support to revive demand (waive/reduce GST for a year at least, modify LTA to be part of IT slabs), etc.

What steps did you take to win the confidence of guests after the pandemic?

At Accor, welcoming, safeguarding

and taking care of others is at the very heart of what we do and who we are. The health, safety and well-being of our staff, guests, owners and partners remains our top priority as the world goes through this unprecedented crisis. We elevated the hygiene and cleanliness norms even further with Accor's global unique cleanliness and prevention label called ALLSAFE, which represents some of the most stringent cleaning standards and operational protocols in the world of hospitality. These global standards have been developed with and vetted by Bureau Veritas, a world leader in testing, inspection and certification. We got immensely benefitted and guided by the group's operational expertise, our geographic footprint, and the lessons learned from previous outbreaks of infectious disease. The said track record and expertise enabled us to seamlessly adapt new customer hygiene expectations.

Our efforts in fighting Covid-19 and supporting local government and local health authorities never went unnoticed and we were awarded under 'Swachh Survekshan-2020' by GMC and ministry of Urban Development.

We were also awarded as 'Best Hospitality Brand of 2021' under Utkrisht, The Assam Excellence Award 2021 hosted by TV News channel News 18 Network.

Did you see any traction of leisure travelers after the unlock? Witnessed the revenge travel phenomenon by a section of tourists?

Leisure travelers are definitely coming back after the unlock. Opening of religious temples, wildlife sanctuary 'Kaziranga' and leisure destinations like Shillong & Cherrapunji has added impetus to the leisure movement. We are hopeful of doubling the leisure business in Q4 of the CY. I am not sure

about Revenge Travel but leisure is coming back with a predictable pace in Guwahati.

Have you organized vaccination for your staff? Do you think vaccination drives will change the scenario?

As stated earlier, our highest priority is the health and well-being of our colleagues. I can proudly say that we were among very few organizations who were forerunners in getting their employees vaccinated. We have 100 per cent staff with at least one dose of vaccine and more than 85% staff who have completed both the vaccines.

I believe vaccination is the only long-term solution to Covid-19 in India. I am also confident that this largest vaccination drive in the world will help build herd immunity and boost the confidence of travelers, thus changing the business scenario drastically.

Can you see green shoots after the upcoming festival season?

We are already witnessing green shoots in Guwahati before the festival time kicks in. Stable socio-political environment has also contributed to the said recovery. The bounce back after the second wave is remarkable. August and September performance was far better than the forecasted numbers. Forward outlook is extremely positive with the upcoming festive season being a catalyst to pent up the demand. One of the largest vaccination drives in the world is also helping bring back renewed confidence in India. It is highly encouraging and I am sure of bouncing back much earlier than we thought of.

Are you expecting more MICE customers in the coming days? Are postponed weddings happening again?

With the downfall of the MICE Industry due to the second wave of Covid-19 pandemic, the events and exhibition industry has also faced immense complications. But looking at a positive note, the vaccination drive could bring the silver lining to the industry and I expect revival of MICE by Q2 of 2022. MICE as I understand have traditionally played a role in bolstering and growing economic sectors, but this year they will play a new role – rebuilding and recovering communities.

COVID-19 has also seen Indian wedding trends transition rapidly. The Big Fat Indian Wedding trend took a back seat and real couples drove their weddings in the time of corona from the comfort of their homes with limited family members. Many couples have opened their minds and hearts to the idea of intimate weddings but nothing is set in stone. Weddings are definitely happening but in a tweaked fashion. One factor that will remain constant is the desire for human connection and the celebration of love with loved ones—no matter what that celebration looks like.

Do you think the industry will be back on its feet by 2022?

The industry experts are predicting that the hotel industry is unlikely to have a full recovery until 2024. However, I am a little optimistic and believe it will be in phases and shall start from domestic travel. Demographics will also play a vital role in deciding the full recovery of the industry.

For Guwahati and most of the eastern part of India, I am of the opinion that by the end of 2022 we shall be having our industry back on track in terms of occupancies, ADR can still wait for some more time to reach 2019 levels.





Mr Sudesh Poddar gets elected as President of HRAEI



HOTEL and Restaurant Association of Eastern India (HRAEI) has elected a new set of leadership for the region for the next one year. Mr Sudesh Poddar, an eminent hotelier, with business interest in the hospitality industry in the States of Assam and West Bengal, was elected as the President of the association in the recently concluded Annual General Meeting held in Kolkata. Mr Pranav Singh, Managing Director, Opium and Oval Restaurants, was elected President of the Association.

Mr Poddar said that his top priority is to revive the hospitality and tourism industry in the eastern part of India hit hard by the Covid-19 pandemic. He said, "To attract more tourists in the region, especially the North Eastern India, we shall appeal to the Government for

more flights and easier access. We are in the process of making a roadmap to promote a lot of inbound tourism to tap the tremendous potential of this region." Mr Poddar also expressed his deep concern for those entrepreneurs who invested in the tourism and hospitality sector before the pandemic. "Covid-19 has hit them hard. We shall appeal for moratoriums on loan repayment and relaxation on interest rates for them," he said.

Mr Pranav Singh mentioned how the association has tried to help the members in the past year of crisis and also shouldered social responsibility of helping out citizens affected by the pandemic. "Whatever we have achieved in the tough times has been possible due to a strong team guided by seniors. We operate like a big family here," he said.





Return to a world transformed

How the pandemic is reshaping corporate travel. An Insight by Deloitte

CORPORATE travel, which took a big hit during the pandemic, is showing green shoots again. But will it approach pre-pandemic levels any time soon? How will the shift toward remote work affect the return of internal meetings, client visits, and conferences? The answers to these questions will determine how businesses and travel providers pivot to function in the new normal.

Shortly after the COVID-19 pandemic brought global travel to a standstill, one thing became clear: Corporate travel would face a slower return than leisure, almost as surely as international travel would lag domestic. Although much remains to be seen, these predictions have largely borne out. US travel suppliers have started seeing some relief in the first half of 2021. A successful vaccine rollout, and updated Centers for Disease Control and Prevention (CDC) guidance designating travel as safe for vaccinated people,¹ have ushered in the return of domestic leisure travel (for more details, read our report, *Keen but cautious*).² But corporate travel faces a slower return, thanks to a more complex set of considerations.

Conferences and trade shows, which account for a significant volume of business trips, remain mostly virtual. Many offices remain closed,

which limits sales and project-based corporate travel from both sides: Companies find it hard to ask employees to take work trips, and many of their clients, vendors, and partners have yet to open their doors to employees, let alone visitors.

These conditions are temporary though. Conferences and other industry events have begun their comeback, in live and hybrid formats, which will accelerate in the fall of 2021. Some workers returned to offices in summer 2021, and more will do so this fall. The eventual scale and shape of these staples of corporate life are unclear, but they are returning, and an uptick in corporate travel will follow.

Despite the relative success many companies experienced through a year of essential-only travel, business leaders realize the value of face-to-face interaction. And similar to the return to office-based work, road warriors fall on all points of a spectrum: from eager to return to airports, hotels, and conference rooms, to convinced they can do their work effectively with significantly less travel.

The reality falls somewhere in between. Competition and growth imperatives will necessitate a resumption of business travel. But travel use cases have been reevaluated based

on their impact on the bottom line and the environment, as well as how well they can be replaced by now widely adopted tech platforms.

This report relies on a combination of qualitative and quantitative research to gauge the timing and nature of business travel's return with quarter-by-quarter projections through the end of 2022. And Deloitte's *Why We Fly Matrix* offers a structured view of the implications that tech replacement could have for travel over the longer term. The matrix places travel use cases into four categories based on their importance to business success vs. the effectiveness of technology replacements. This analysis uncovers the types of travel likely to lead the return, and types that likely face long-term reduction. Travel providers that prioritize accordingly, and adapt their products, services, and messaging to meet changing needs, may stand to capture a greater share of spend as it returns over the next few years.

Timing the return

Most US-based companies' travel budgets declined by 90% or more beginning in early 2020. Companies restricted travel to essential trips, and added layers of executive approval. Client-requested visits, servicing of



equipment, and fulfillment of government contracts constituted much of the travel deemed essential. Travel segment share shifted, as many opted to drive instead of fly and sometimes extended trips to minimize the number of flights taken.

As companies plan for the coming quarters, most have not identified formal triggers for opening up travel, but leaders have their eyes on a few key developments (figure 1). Public health milestones lead the way. In interviews, executives reported closely watching vaccination and

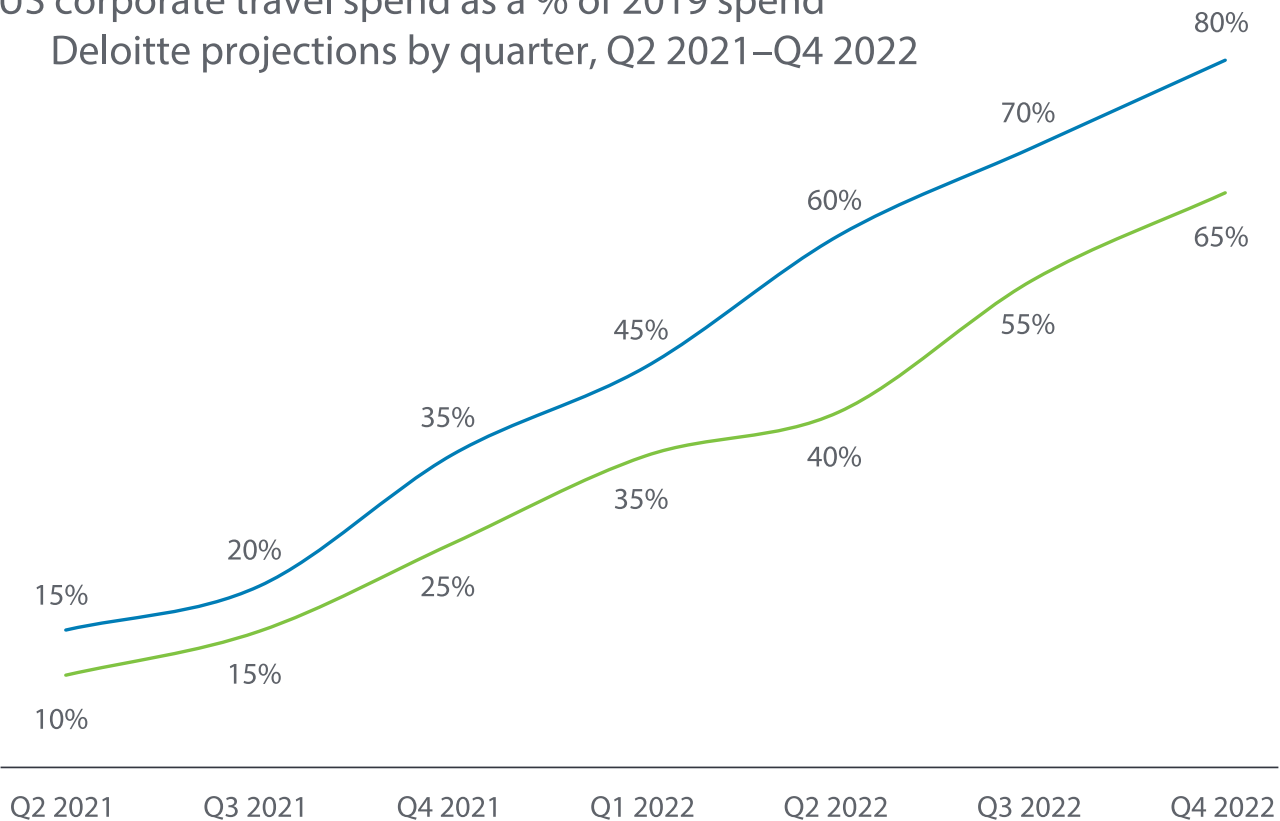
infection rates, but lacked specific targets. Survey respondents also gave public health indicators the highest importance, with about four in 10 ranking each of these among the top three developments that could boost their companies' travel volume. The reopening of offices—for companies and their client bases—will also unleash some travel demand.

Among all options, survey respondents gave the lowest importance to digital health passports, interoperable and accepted across carriers and ports of entry. Several airlines

and nations have adopted different protocols, but there is no widely accepted standard. This is not a barrier to domestic travel, which accounts for about 68% of respondents' spend. Interoperable digital health passports have a larger role to play to enable overseas business travel at scale, by reducing or eliminating the need for quarantine on arrival. The easing of entry restrictions was among respondents' top four triggers for increased travel.

Looking ahead, companies also see several factors potentially slowing

US corporate travel spend as a % of 2019 spend Deloitte projections by quarter, Q2 2021–Q4 2022



corporate travel's return. Persistent travel restrictions could create the most drag (figure 2). While the CDC has cleared vaccinated people to travel freely within the United States, the organization expresses higher concern regarding international trips.³ And more demanding, and sometimes unpredictable, entry requirements across countries and regions further complicate cross-border trips.

Beyond public health requirements, employee discomfort with travel, as well as clients' discomfort with in-person interaction, could slow travel's return. Additional external drag factors include the continued delay or cancellation of industry events, as well as higher airfares and hotel room rates.

Travel's return by quarter, Q2 2021 through Q4 2022

Taking into account the biggest triggers and potential drag factors for travel's return, as well as companies' travel spend estimates through the end of 2022, Deloitte has developed a quarter-by-quarter view of corporate travel's return. Survey respondents and interview subjects shared their projections on when their companies would reach certain benchmarks, as a percentage of 2019 quarterly spend (figure 3). As of Q2 2021, less than 1 in 5 companies had reached even 25% of their 2019 quarterly spend. By Q4 2022, nearly half say they do not expect to reach 2019 spend levels, but nearly 9 in 10 expect to reach 75% or higher.

When the research was conducted in May and June of 2021, most com-

panies had yet to begin a significant return to business travel. More than two in three survey respondents said their companies were still at less than 25% of 2019 spend. Executive interview subjects, concentrated among big companies with an average pre-pandemic air spend of US\$123 million, were at even lower levels. Many had increased travel in the second quarter, but only slightly after a year when most saw spending drop by more than 90%. Both current spend and projections indicate that the smaller companies in the survey will resume travel at a faster rate than the bigger companies included in the interviews. The following quarter-by-quarter estimates rely on both the survey and the interviews.



Q2/Q3 2021: Incremental improvement from pandemic lows

Q2 projected US business travel spend as a share of 2019 spend: 10%–15%

Q3 projected range of US business travel spend as a share of 2019 spend: 15%–20%

Companies have begun to loosen travel restrictions, no longer only allowing essential travel. Nearly all conferences remain virtual, while some trade shows and exhibitions return to a live or hybrid format. Domestic travel has become safer and easier,

as states lift quarantine-on-arrival recommendations. As of April 2, the CDC changed its guidance to clear vaccinated people to travel.

Many companies still require extra layers of approval for corporate trips, and travel volume has only grown slightly from the end of 2020. In Q2, less than a fifth of surveyed companies had reached 25% of 2019 spend. International travel remains all but prohibitive, with quarantine on arrival required in many countries regardless of vaccination status. The vast majority of conferences remain

in virtual formats. In Q3, the number of companies expecting to reach at least a quarter of 2019 travel spend doubled, but fewer than one in five expect to reach 50% of 2019 spend. Much of the corporate travel happening in Q2 and Q3 2021 will be at the request of existing clients. Visiting sales prospects remain challenging, as most have yet to return to offices full time.

Q4 2021: Loosening the reins, first forays

Q4 2021 projected range of US busi-



► **For more than a year, conferencing and collaboration technology platforms took the place of flights, hotels, and board rooms.**

ness travel spend as a share of 2019 spend: 25%–35%

Many companies plan to significantly accelerate their return to offices in the fall. Travel managers have identified this shift, especially clients' return to the office, as a top trigger for travel. For workers with children at home, resumption of in-person learning will also make travel more convenient. Higher office usage will enable more meetings, both internal and external. Many conferences will

return to a live or hybrid format, but with attendance well below 2019 levels. Still, about a third of surveyed companies say travel spend will remain below 25% of 2019 levels and two-thirds below 50%.

Barriers to international travel could start reducing by this time, easing the quarantine burden of visiting countries in Europe, the Americas, and the Middle East. But corporate travel will remain largely domestic, with international trips limited to

essential and client-requested travel.

Q1/Q2 2022: Quiet winter, green shoots in early spring

Q1 2022 projected range of US business travel spend as a share of 2019 spend: 35%–45%

Q2 2022 projected range of US business travel spend as a share of 2019 spend: 40%–60%

With the beginning of what could be the first full year without COVID-19 as a primary daily concern, most companies will remove pandemic-era

executive approval requirements for domestic trips. But travel managers rank employee and client resistance to travel and in-person meetings as one of the biggest potential factors to slow the return. This resistance will likely reach its peak as a factor in the winter of 2021–22. Cold and flu season, as well as potential outbreaks of COVID-19 and its variants, will raise concern among potential travelers during a sensitive transition period. This will likely have a dampening effect on the last quarter of 2021 and the first of 2022.

Spring will bring more confidence and more competitive pressure to get in front of clients and prospects. A second season of live and hybrid industry conferences should enjoy better attendance than in fall 2021. Barriers to international travel should continue to come down, but cross-border trips will lag far behind domestic trips. Concerns about the risk and inconvenience of crossing borders will continue to drag down traffic on transatlantic routes, and Asia will remain difficult to visit. International industry events will bring back live formats, but struggle to attract overseas attendees. Additionally, COVID-19 outbreaks that would cause little concern for domestic travelers could result in a higher rate of cancellations for international trips.

Q3/Q4 2022: Approaching the new normal, but still not a full recovery

Q3 2022 projected range of US business travel spend as a share of 2019 spend: 55%–70%

Q4 2022 projected range of US business travel spend as a share of 2019 spend: 65%–80%

If US vaccinations continue to increase, and the vaccines' effectiveness against major outbreaks and variants proves durable, travel managers expect a big release of pent-up demand

in the second half of 2022. More clarity about both the health situation and the ongoing state of office versus remote work will better support both trips planned in advance and last-minute visits to seal deals and execute projects.

International travel will continue to improve, bringing better connectivity with many of the United States' key trading partners. But much of Asia will still be difficult to visit. Reports suggest the Chinese government has already decided to keep its borders effectively closed through the end of 2022.⁴ India's struggle with COVID-19⁵ and Japan's rocky experience as the Olympics host⁶ are likely to leave both countries with little political will to accelerate reopening.

Conferences will continue to evolve as organizers work to create formats that maximize return on in-person interaction, while integrating technology to enable virtual participation. The majority of surveyed companies are optimistic that their travel spend will reach 2019 levels by this time—nine in 10 expect to be at or above 75%. Just over half of the respondents expect to return within three years to 2019 spend levels.

By the end of 2022, US corporate travel may be near its new normal, the level it will sustain for the next several years. Assuming significantly reduced quarantine on arrival for Europe, the Middle East, and the Americas, and several months of a stable health situation, US corporate travel could reach 80% of 2019 levels. This would represent more than 4x growth from where it stands in summer 2021, and more than 2x growth from the 35% projected for the last quarter of 2021. Still, all of the current barriers to robust corporate travel are complex and those working to remove them face significant challenges. If public

health outcomes improve more slowly than expected, and solutions to enable international movement continue to encounter political roadblocks, corporate travel spend by the end of 2022 could be much lower. Reaching just 65% of 2019 spend levels would imply a scenario with still very limited international movement, as well as a stalled return on the domestic side.

Assuming a stable global health situation by the end of 2022, US corporate travel's new normal will begin to take shape. Companies' and workers' approaches to post-COVID-19 travel will be clearer. Borders will likely be more open, though onerous border policies may remain in parts of the world. As the pandemic-related barriers to travel recede, second-order effects will become the more prominent headwinds to corporate travel growth. While companies recognize that travel is crucial to business success, they will seek to hold onto some of the cost savings brought by the pandemic pause.

For more than a year, conferencing and collaboration technology platforms took the place of flights, hotels, and board rooms. The inability to get together face-to-face challenged business success in many ways. As the pandemic situation continues to improve, as travelers calm their first-trip jitters, and as industry events resume in-person, business leaders and corporate travelers will face a new calculus in determining whether to get on a plane or just get online.

This report draws on a survey of 150 travel managers, executives with various titles and travel budget oversight, fielded from May 28 to June 10, 2021. Deloitte conducted interviews in parallel to the survey, with executives at companies whose 2019 air spend averaged US\$123 million.

Full vaccination is a significant driver for us to gain the confidence of our guests

ABHISHEK SACHDEV was appointed as the Hotel Manager of Fairfield by Marriott Kolkata in December 2019. With 13 years of enriching experience and nifty managerial skills, Abhishek has brought to the table a dynamic energy to Fairfield by Marriott Kolkata. Abhishek will be responsible for not only the successful opening of the hotel but also delivering high levels of customer service. He will play an integral role in the positioning of the hotel by performing diverse responsibilities which include strategic initiatives to boost market profile, align cost heads, staff engagement and overall management of the hotel to secure its leadership position. In his previous role, he was Operations Manager at Taj Fisherman's Cove, Chennai.

He spoke to Mystic East in an exclusive interview. Excerpts:

How has your hotel coped with ever since Covid-19 broke out?

Fairfield by Marriott Kolkata opened in December 2019 to resounding success but COVID 19 brought the great start to an abrupt halt. It was a challenging time for everyone with contingency measures lasting for almost the entire year; however, we were amongst the first ones to bounce back in the latter half of 2020 with revenue streams of rooms and food & beverage returning during the festive season. The second wave of

COVID 19 in 2021 did have a negative impact on the hotel operations; however, the aggressive steps taken by the Government to drive vaccination in the country has immensely helped the hotel as well as the industry to come back on its feet much faster vis-à-vis the time taken in 2020. We are now looking at healthy occupancies similar to the pre-pandemic months.

What are the innovations you introduced to buck up ancillary revenue streams during the period? Do you wish to continue with these innovative ideas?

Home delivery of food has been a

vital ancillary revenue stream for the hotel during this period. Marriott Bonvoy on Wheels with its stringent food safety and hygiene standards continues to be a preferred choice of guests to get food delivered at the safety of their homes and we see this continuing in the next few years to come.

Did you get any support from the government in the tough times? What are your expectations from the government?

The ease of restrictions after the second wave of COVID 19 and the rapid pace at which the Government



is working to vaccinate the people in West Bengal and other states as well is enabling a faster recovery for the industry as a whole as we see business travel returning in full swing at our hotel. The hope is that we are at the end of the COVID 19 tunnel and while the third wave does loom over us, the government & industry are taking adequate steps to ensure a minimal impact and business can return to pre-COVID levels as soon as possible.

What steps did you take to win the confidence of guests after the pandemic?

Marriott's 'Commitment to Clean' protocols have been a major driver in winning the confidence of guests in the post pandemic world. Our stringent hygiene measures along with

100% compliance of mask hygiene by the associates have ensured that guests feel absolutely safe at our hotel.

Did you see any traction of leisure travellers after the unlock? Witnessed the revenge travel phenomenon by a section of tourists?

After the first unlock in 2020, there was a boost in the local travel and staycations. With international boundaries closed, the pent-up demand amongst people resulted in locals driving out to hotels to spend their weekends with family as a way to rejuvenate. We amplified this segment of travel by offering not only tailor-made packages, but also the promise of a safe environment for them and their loved ones.

Have you organised vaccination for your staff? Do you think vaccination drives will change the scenario?

As an organization, we always place our people first and hence, we lead from the front by organising vaccination drives for our colleagues; most of our associates are now fully vaccinated with the second dose as well. This has been a significant driver for us to gain the confidence of our guests. Vaccination drives have already brought about a positive impact to the overall business in the country and the focus must continue in this direction.

Can you see green shoots after the upcoming festival season?

Business travel has returned to almost pre-COVID levels in Kolkata with travellers arriving seamlessly with vaccination certificates in tow. Post the festive season, the occupancies as well as rates will be on the rise with the wedding season kicking in. I hope that by the end of this year, the hotel would be able to clock in pre-COVID profitability which would be a real testament to the success of the recovery of the hotel.

Are you expecting more MICE customers in the coming days? Are postponed weddings happening again?

MICE business has been the slowest to recover this year but we are witnessing green shoots from Q3 of 2021 wherein customers are now organizing meetings and we anticipate a full return of MICE by mid-2022. Weddings, on the other hand, have bounced back at a greater pace and all cancelled events amidst the second wave have been booked again at our hotel adhering to all Government norms which will give a big boost in the Q4 revenues and will help us end the year on a high note.

ESCAPE TO NATURE

Located at an accessible place close to the city, yet offering all the charms and serenity of a lush green atmosphere Amaya Resort NH6 is a coveted destination for families, couples and corporates



Nowhere else would you find such a tranquilizing atmosphere and mind-boggling features that refresh and revitalize you

A MAYA Resort NH6 is a star-class hotel located close to Kolkata. Easily accessible from the city, the property is sprawled across a staggering 13 acres of greenery. Its surroundings are calm and serene, offering the perfect sanctuary for couples and families to relax and rejuvenate. The property is equipped with 90 well-appointed rooms under varied categories to suit the individual taste and preferences of different people.

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The USP

The Invigorating Accommodation: The stunning resort with incredible views and exclusive amenities is like an oasis for city dwellers who are often found to reel under a hectic life-style. There is an individual balcony or patio attached to each guest room.

Novel Outdoor Activities: Amaya provides a host of fun and adventure activities such as archery, kayaking, water-walking, and much more. Make unforgettable memories by enjoying a joyful, revitalizing stay at this property filled with charm.

Affordable Luxury: Amaya Resort treats guests with the luxury suites that overlook the shimmering lake, modern aesthetics that appeal to those who seek a break from their tiring routine, and the sophisticated comforts of a 5-star hotel.

Ideal for staycation: Amaya Resort is the first choice when it comes to spending your staycation with friends and families. Offering a panoramic view of the swimming pool and the lake, the rooms and suites are surrounded by lush green lawns. This amazing resort has the location advantage and includes amenities such as a well-equipped Bar, Spa, Wi-Fi, business centre, restaurant, and conference room, among others.

Close to nature: With acres of greenery and a large, pure lake, this property is a paradise on earth for city dwellers. Nowhere else would you find such a tranquilizing atmosphere and mind-boggling features that refresh and revitalize you.

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- Offering a panoramic view of the swimming pool and the lake, the rooms and suites are surrounded by lush green lawns. This amazing resort has the location advantage and includes amenities such as a well-equipped Bar, Spa, Wi-Fi, business centre, restaurant, and conference room, among others.

Turned into a hot wedding destination

Mystic East spoke to Sabyasachi Chatterjee, Associate Director of Sales, Amaya Resort Kolkata NH6

When did the resort start its operation? How good was the response?

We started in January 2019. The response was overwhelming as we had done good corporate branding. We were attracting huge groups of corporate clients as well as wedding customers.

You mean MICE customers?

Yes. Both MICE and weddings. The resort turned into a kind of a wedding destination for people not only in Kolkata or West Bengal, but states in eastern India—Assam, Bihar and Jharkhand. There were even clients from Chhattisgarh.

But then Covid hit within a year. How did you cope with the situation?

Except during the strict lockdown period, we had our regular clients. We charged at a nominal rate and adopted all possible hygienic measures to keep up with the situation. We created videos and spread the word around in social media, including Whatsapp. Then we made arrangements so that corporate customers could carry on in a “work-from-home” atmosphere. We organised high speed Wi-Fi and all the basic amenities including hygienic food and thoroughly sanitised rooms. We also offered attractive packages for customers. All these helped us get back 20-25 per cent of customers in no time.



You got leisure travellers too?

Yes. We offered special week-end packages to attract them. Families and couples availed this. To facilitate their visit we also organised transport for such clients to ensure safe and hygienic travel. This helped us gain confidence from families with kids.

Hope your staff is vaccinated.

Yes. Most are double vaccinated. The staff are well trained to handle Covid protocols.

How is the business now?

Business is recovering gradually. We expect a much better situation in 2022.



► The large manmade lake and the beautifully designed swimming pool provide a floating experience to guests.

NEW PROPERTY



► The property is equipped with 90 well-appointed rooms under varied categories to suit the individual taste and preferences of different people.





► The resort turned into a kind of a wedding destination for people not only in Kolkata or West Bengal, but states in eastern India — Assam, Bihar and Jharkhand





HOPE FROM VACCINES

Here's assessment on the economic consequences of Covid-19 on tourism world by the United Nations Conference on Trade and Development



► **A major challenge currently is the uneven availability of vaccinations and the low number of vaccinated people in many countries**

Tourism is one of the sectors most affected by the COVID-19 pandemic. Indeed, the number of international tourist arrivals declined by 84 per cent between March and December 2020 compared with the previous year, according to data observed by UNWTO. Based on a range of tourist arrivals' projections, the report quantifies the potential economic effects of the contraction in tourism in 2021.

The indirect effects are significant. Due to linkages with upstream sectors such as agriculture, a drop in tourist sales leads to a 2.5-fold loss in real GDP, on average, in the absence of any stimulus measures.

Based on three scenarios, one optimistic, one pessimistic and one where the asymmetric speed of vac-

inations is considered, the economic losses could range between \$1.7 trillion and \$2.4 trillion in 2021. The results highlight the importance of the vaccine rollout in getting global tourism restarted and other mitigating measures.

Lockdown era

The COVID-19 pandemic has been a health and economic crisis with devastating effects on developing countries, especially those dependent on tourism. As governments have attempted to protect their populations, lockdowns, quarantines, and major restrictions on national and international mobility were implemented. This, coupled with the decision of consumers to limit international travel resulted in a sharp contraction

for the tourism sector with severe economic consequences, particularly on countries that rely on the sector. The number of international tourist arrivals declined by 74 per cent in 2020 compared with the previous year (UNWTO Tourism Dashboard). In many developing countries, arrivals were down by 80-90 per cent. The beginning of the year 2021 has been worse for most destinations, with an average global decline of 88 per cent as compared to pre-pandemic level, although the northern summer and autumn may see a significant improvement for some destinations, in particular for domestic and regional travel. The indirect effects of this decline are even more devastating, as labour and capital remain unused and the lack of demand for intermedi-

ate goods and services has a negative upstream effect into many sectors. This note attempts to quantify these effects and shows how the rollout of vaccines may affect these estimates.

Vaccines and the uneven prospects for tourism

The COVID-19 virus has so far – by June 2021 – infected 179 million people globally and contributed to 3.9 million deaths (WHO, 2021). After abating somewhat in February and March, 2021 daily cases increased to almost one million a day and still amount to 400,000 per day. Vaccine doses administered are approaching 2.4 billion. Vaccinations appear to have slowed the spread in some countries, such as Israel, the United Kingdom, and the United States of America. In most developing countries, access to and distribution of vaccines is a limiting factor, and the virus continues to spread at an alarming rate in India, Brazil, and in many countries where tourism is important for people’s livelihood such as Maldives and Seychelles. On the other hand, other countries where tourism is an important sector such as Thailand, Morocco, and Barbados, appear to have done well in controlling the spread.

A shot in the arm

Vaccines are a critical part of the solution, albeit with considerable uncertainty, even once access and distribution problems are overcome. While effective at limiting severe cases and deaths from the virus, so far it is not clear that current vaccination efforts completely halt the spread of infection. There are people who are reluctant to receive the vaccine, as they fear adverse short, or long-term effects. In addition, people who have had the vaccine may take less care

with other preventative measures, and therefore expose themselves and others.

Fears that vaccinations will be less effective against new variants of COVID-19 add another layer of concern. However, a major challenge currently is the uneven availability of vaccinations and the low number of vaccinated people in many countries.

Given these constraints, it is unlikely that tourism will bounce back to its pre-pandemic levels within a year or two.



Number of inbound tourist arrivals in 2020

The massive contraction in tourist arrivals

The United Nations World Tourism Organization (UNWTO) reports that almost all countries have implemented travel restrictions of one sort or another, such as travel bans, visa controls and quarantines (UNWTO 2020). As a result, international tourism was almost totally suspended in April and May of 2020. Inbound tourist arrivals declined 74 per cent between January and December 2020, about 1 billion trips. However, if the pre-COVID

months of January and February 2020 are excluded, the fall in arrivals amounts to 84 per cent.

The most affected regions are North-East Asia, South-East Asia, Oceania, North Africa and South Asia. Least affected regions are North America, Western Europe and the Caribbean. This shows that the greatest impact has fallen on developing countries. The reduction in tourist arrivals across developing nations is relatively consistent, mostly between 60 and 80 per cent.

Jobs at stake

Tourism is an important source of income for many developing countries, accounting for 50 % of total exports for many small economies, particularly Small Islands Developing States such as Maldives and Saint Lucia (UNCTAD 2020b). Tourism has relatively low barriers to entry and employs a high share of young people and women.

A grim outlook for some

The UNWTO (2021b) reports that tourism experts do not expect a return to pre-COVID arrival levels until 2023 or later. In fact, nearly half of the experts interviewed see a return to 2019 levels in 2024 or later (UNWTO, 2021c). The main barriers are travel restrictions, slow containment of the virus, low traveller confidence and a poor economic environment.

Travel has adapted to the impact of COVID particularly in terms of travel restrictions. Domestic travel has increased, but this does little to help developing countries that are dependent on international travel. Retirees, who tend to spend more per trip, are more likely to stay at home. Younger travellers, such as backpackers, who seem more willing to travel during this pandemic tend to stay longer



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but spend less than older travellers. Cruise ships, involving extended confinement, are likely to be less popular. Developing countries dependent on cruise ship arrivals may need to diversify their industries.

The proportion of vaccinated people can be an indicator of tourists' wanderlust and their possibilities to travel. Although the proportion in the countries of origin as well as in the destination can be decisive, it is likely that tourists will nevertheless hesitate to travel long-distance, preferring closer destinations with high vaccination levels. The share of vaccinated people varies significantly across countries, from below 1 per cent to over 60 per cent (Reuters COVID-19 Vaccination Tracker). It is likely that tourism in countries with a high share

of vaccinated people will rebound faster than in countries with a low share.

Travel within Europe and North America, for example, is likely to pick up faster beginning this summer than many developing countries, who are still struggling.

Last summer and an update

In July 2020, UNCTAD, in its report COVID-19 and Tourism (UNCTAD 2020a), presented three scenarios on the potential economic impact of the pandemic on the tourism sector and sectors directly or indirectly linked to it. A 12-month lock-down was estimated to incur a cost of US\$3.3 trillion, including indirect costs. Unfortunately, even the worst-case scenario has turned out to be optimistic. Few

observers expected that international travel would still be very low after 12 months. This note updates this report and estimates the economic effects going forward. As in the previous report, a general equilibrium model that captures the backward and forward linkages between sectors is used. Therefore, indirect losses to upstream industries that supply food, beverages, accommodation and transport to the tourism sector are estimated. It is also taken into account that labour and capital no longer needed in the tourism sector may be employed in other sectors. In the short run, however, labour and capital are likely to remain unemployed due to frictions in labour and capital markets. It is difficult to find alternative uses for empty planes, cruise ships



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and hotels, and in the short term for staff who work in these industries. In a prolonged downturn, the ability to reemploy labour and capital in other industries is crucial.

It is useful to examine inputs used in the tourism sector, as these determine the indirect effects of a tourism downturn. Globally, labour and capital account for half the inputs, with agricultural products (food and beverages) and services (accommodation and transport) contributing most of the rest.

It is worth noting that even in developed countries where labour is expensive, such as France or Norway, payments to labour account for a large proportion of inputs. This reflects the high wage rates rather than the number employed. In many developing countries, such as Turkey, wage rates

are low but the number of employed is high. As a generalization, our data from the Global Trade Analysis Project (GTAP), which is based on national accounts, suggests that labour accounts for around 30 per cent of tourist services expenditure in both developed and developing economies.

Some other inputs into tourism services are also labour intensive. Food and beverage products are major inputs. These are labour intensive, but in this instance the labour tends to be more skilled in comparison to other sectors.

Possible scenarios for 2021

The three scenarios presented below are consistent with UNWTO (2021b) projections for 2021. The first scenario is a reduction in tourist arrivals as observed in 2020. Reductions averaged

74 per cent with considerable variation between countries. This average reduction is close to the 75 per cent reduction in UNWTO's pessimistic scenario.

The second scenario is a reduction in arrivals averaging 63 per cent, which the UNWTO sees as an optimistic outcome in 2021.

The third scenario takes into account varying rates of vaccination and assumes a 75 per cent reduction in countries with low vaccination rates, and a 37 per cent reduction in countries with relatively high vaccination rates.

The cut-off point is economies with 50 per cent of their population vaccinated at the end of May. There are 55 such economies, according to Our World in Data.⁴ This includes major destination countries such as the

United States, Italy, France and Spain as well as many smaller economies.

The world is divided into 38 economies and regions, reflecting available data, and match these regions with UNWTO estimates of inbound tourist expenditure for 2018 and the estimated reductions in international arrivals (UNWTO Tourism Dashboard). The direct and indirect impacts on consumption, Gross Domestic Product (GDP) and employment in each of the 65 goods and services sectors in each region can be estimated.

The standard GTAP model is used and the 2014 database is projected forward to 2019, the last pre-COVID year. Our simulations assume each economy is the same size as in 2019, although it is acknowledged that some economies may not have returned to pre-COVID levels, while other may have grown by several per cent.

Importantly, the standard labour market assumption sector is modified to allow for unemployment in the tourism sector. Unskilled workers put out of work from the downturn in tourist arrivals will most likely not find employment elsewhere. The adjustment occurs in employment rather than wages. It is assumed that skilled workers and capital can be re-employed elsewhere, although this drives down wages and the return on capital. Details are described in UNCTAD (2020a).

The results presented here are based on simulations that capture the effects of tourism reduction.

Cascading effects

A feature of Computable General Equilibrium modelling is intersectoral effects. This means a reduction in output in one sector leads to a reduction in demand for inputs from other

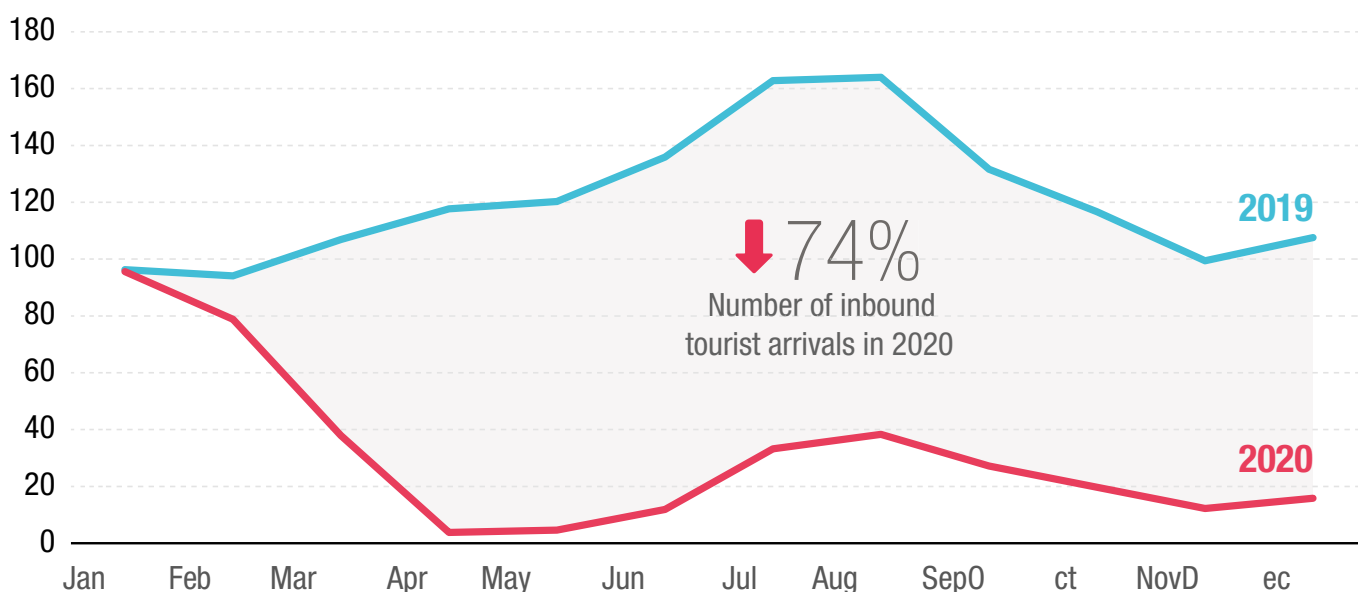
sectors, and so on down the supply chain. It also means that labour and capital no longer needed in one sector can be re-allocated into other sectors. If there is a fall in demand for labour and capital, wages and rates of return need to fall or employment falls. Idle factors of production lead to a fall in output, measured by GDP at the national level.

Our analysis shows that depending on employment effects, the indirect effects of a drop in tourism receipts increase the cost.

This ratio varies greatly across countries, from one to three or four-fold. This depends on the backward linkages in the tourism sector, including the unemployment of unskilled labour.

The effect is somewhat greater for developing countries, as some developing countries are much more dependent on tourism.

Figure 1 | International tourist arrivals (In thousands)



Source: UNCTAD based on UNWTO.



► Globally, the blow to international tourism given by COVID-19 has caused a loss in GDP of more than \$4 trillion only for the years 2020 and 2021, if indirect effects are taken into account as our estimates suggest.

A partial recovery, from a loss of 74 per cent to 63 per cent, reduces the loss in global GDP by 30 per cent to \$1,696 billion. With the benefit of vaccinations being more pronounced in some countries than others, losses are reduced in most developed countries but are worsened in developing countries where the absence of widespread vaccinations keeps tourists away. At a regional level, there are significant differences between scenarios 2 and 3, but the major beneficiaries in absolute terms are the United States, France, Germany, the United Kingdom and Switzerland. These countries have high levels of tourists and high vaccination rates. Developing countries will carry the greatest burden.

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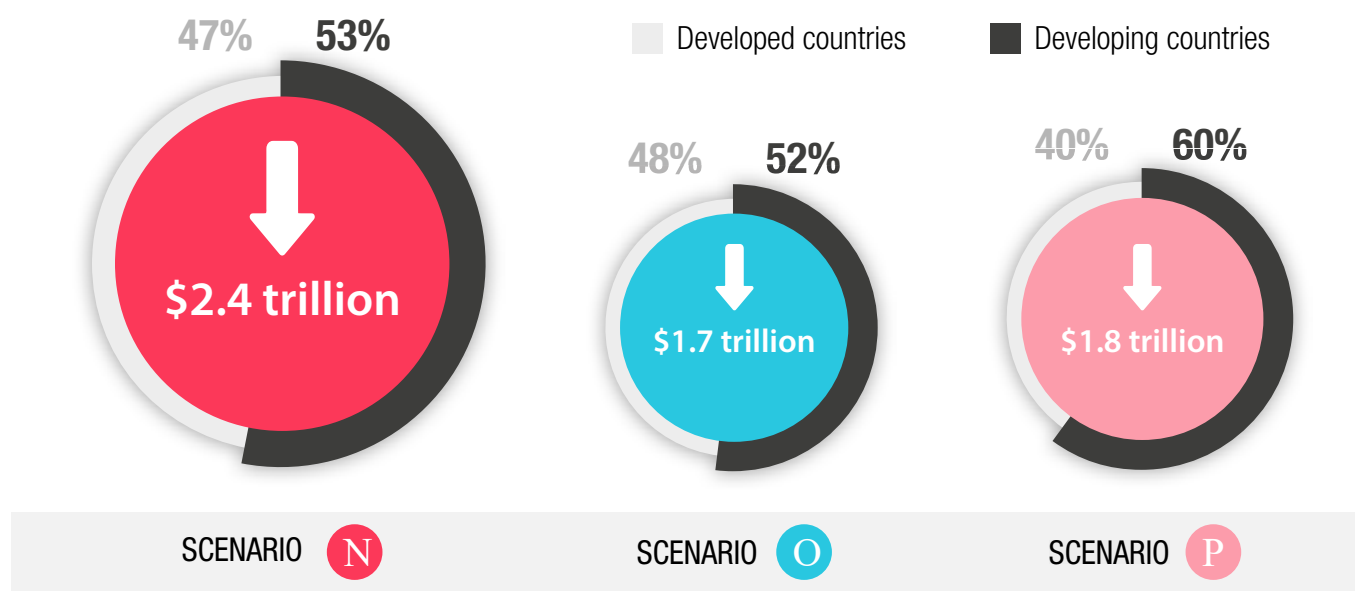
The estimated GDP effects of the observed loss in tourism receipts are shown in figure 5 and in more detail in Appendix. For example, international tourism contributes about five per cent of the GDP in Turkey and the country suffered a 69 per cent fall in international tourists in 2020. The fall in tourism demand is estimated at \$33 billion and this leads to losses in sectors that supply tourism, such as food, beverages, retail trade, communications and transport. The total fall in output is \$93 billion, about three

times the initial shock. The decline in tourism alone contributes to a real GDP loss of about 9 per cent. This decline was partly offset in reality by fiscal measures to stimulate the economy.

Labour market effects

The estimated losses in employment of unskilled labour due to the fall in tourist arrivals is shown in figure 6. The losses vary according to the proportion of unskilled labour employed in the tourism industry and the extent to which the tourism sector is hit in a specific economy. There is a somewhat similar fall in wages and rates of return for skilled labour and capital.

If labour and capital could be

Figure 2 | As tourism falls world GDP takes a hit in 2021, 3 alternative scenarios

Source: UNCTAD based on GTAP simulations.

Note: Drop in global tourist sales are \$934 billion in scenario 1, \$695 billion in scenario 2 and \$676 billion in scenario 3

By June 2021:

3.9 million deaths

179 million people infected

2.4 billion vaccine doses administered

readily re-employed in other industries, the overall impact of a fall in demand for international tourism would be somewhat less than its direct effects. The loss of tourism receipts would be partially offset by output in other sectors. Obviously, in tourist dependent developing countries this is difficult to do in the short run, but more achievable in the longer run. With tourism not expected to fully recover until perhaps 2023 the policy question is whether and how to support the sector until that time.

Policy implications

Tourism is a major economic sector and has a particular socio-economic importance, as it employs many women and young people and provides a livelihood to many informal workers in developing countries. The current pandemic has a devastating

effect for the tourism sector. UNWTO (2021a) estimates that 100 - 120 million direct tourism jobs are at stake. Taking the impact on closely linked sectors into account, the drop in international arrivals has caused an estimated loss of about \$2.4 trillion in GDP in 2020 and it is possible that a similar loss occurs again this year. More positive scenarios for this year with a stronger rebound in tourism in the second half still show a loss of about \$1.7 to 1.8 trillion compared to 2019 levels. The recovery will depend to a large extent on the uptake of vaccines, the removal and coordination among countries of travel restrictions and the rebuilding of travellers' confidence.

Three policy dimensions are important. First, bringing tourism back on track including in developing countries. Much needs to be done to restore the confidence of travellers, who are



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concerned about health, and the risk of cancelled travel plans and becoming stranded overseas. Vaccinations seem the most important element.

So far, the vaccine rollout has varied greatly between countries, from almost complete to hardly started. Rolling out the vaccine globally as soon as possible is an economic priority. Vaccinating 40 per cent of the global population by year's end and 60 per cent by mid-2022 is an aspirational goal, but difficult to achieve and could cost \$50 billion, according to International Monetary Fund, World Health Organization, World Bank and World Trade Organization (IMF, 2021) estimates. Nonetheless, the estimated benefits far exceed the costs.

While vaccination is incomplete and herd immunity not achieved, stepping up coordination and communication on travel requirements is critical. For example, the UNWTO and the airline industry body International Air Transport Association (IATA) collaborate on a destination tracker. The European Union digital COVID certificate is a

major advance in this sense, and IATA is also promoting a travel pass to facilitate the inclusion of travel documents such as vaccination certificates and test results. Other measures to facilitate travel could include cheap, fast and reliable testing. Agreed protocols for testing on departure may remove the need for quarantine on arrival. Common standards are required so that destination countries accept testing in the source countries.

Second, it is important to mitigate the socio-economic impacts on livelihoods. Developed countries have used fiscal measures to support tourism businesses and workers. This is essentially borrowing from the future, and while helpful as a transitional measure, incurs a debt that will need to be repaid at some stage. Where the support is for otherwise healthy businesses, it is likely to pay off. This strategy is a challenge for most developing countries in particular where tourism is large. Social security nets often do not exist, and informality is high. Workers should be protected

rather than specific jobs in declining sectors, for example through training.

Third, countries need to make strategic decisions regarding the future of tourism in their countries. Some tourism businesses will not survive even once travel restrictions are removed. Governments need to decide which to support and for how long. Long term implications of the pandemic need to be considered. Some structural adjustment is likely to be necessary. It seems likely that COVID-19 will be around for some time. A return to normal before 2023 seems optimistic. Furthermore, environmental considerations, for example, may become more important and could increase costs for long-distance flights or increase social pressure to avoid them. Other changes may be a reduction of confidence in cruise ships, more domestic tourism in the three largest source regions, United States, Europe and China. Developing countries dependent on tourism might consider how they can diversify resources away from tourism.

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