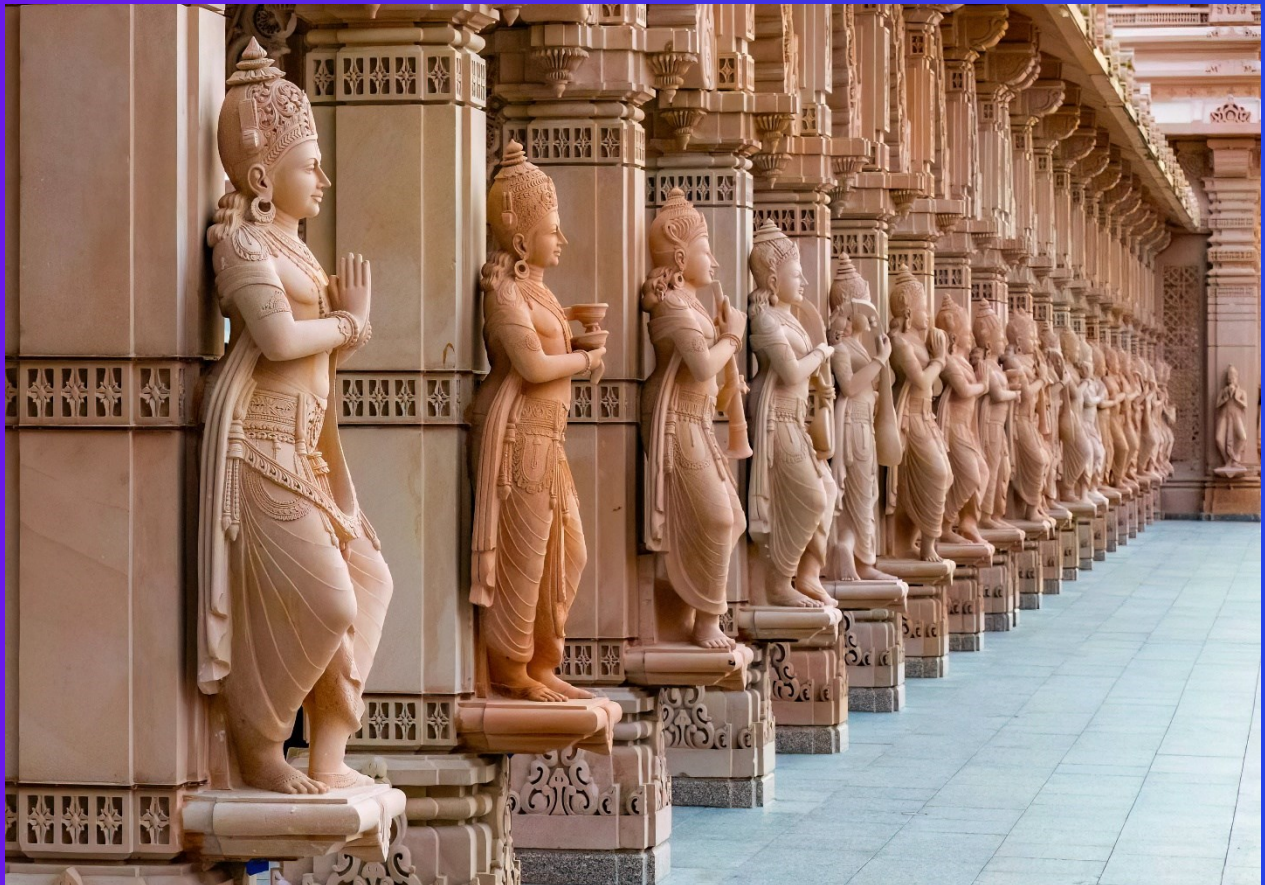


Sacred journeys

Unfolding the evolution and growth
of pilgrimage and spiritual tourism
in India



August 2024

kpmg.com/in

Foreword by PHDCCI



Mr. Sanjeev Agrawal
President
PHDCCI



Sanjeev Agrawal
President

MESSAGE

Tourism is a vital pillar of India's economy, contributing substantially to GDP, job creation and cultural exchange. In 2023, India's tourism sector contributed approximately 9.2% to the national GDP and generated over 42 million jobs, representing 8.1% of total employment. With an ever-increasing number of both domestic and international tourists, India is poised to become one of the leading tourism destinations in the world.

The potential of the tourism sector in driving the vision of Viksit Bharat is unparalleled. As we strive towards holistic development, tourism plays a crucial role in not only boosting economic growth, but also in preserving our rich cultural heritage, promoting sustainable practices and fostering inclusive growth. The diverse and vibrant tapestry of India's cultural and spiritual heritage offers unique opportunities for tourists to experience the essence of our nation.

India, with its ancient traditions, spiritual wisdom and sacred sites, has always been a beacon for spiritual seekers from around the globe. Ayodhya, the birthplace of Lord Rama, is a prime example of a destination that embodies the spiritual essence of India. By promoting Ayodhya and other spiritual destinations, we can create pathways for sustainable development that benefit local communities and preserve our cultural legacy.

This report on Spiritual Tourism will serve as a comprehensive guide for stakeholders to navigate the opportunities and challenges in this sector, paving the way for sustainable and inclusive growth.

I extend my heartfelt gratitude to all our partners, participants and stakeholders for their unwavering support and look forward to the valuable insights and outcomes that will emerge from this conclave.

(Sanjeev Agrawal)

"Voice of Industry & Trade"

Foreword by PHDCCI



Dr. Ranjeet Mehta
CEO & Secretary General
PHDCCI



Dr. Ranjeet Mehta
CEO & Secretary General

MESSAGE

In today's fast-paced world, spiritual tourism offers a unique opportunity for individuals to reconnect with their inner selves, seek solace and gain profound spiritual experiences.

As the birthplace of Lord Rama, Ayodhya attracts millions of devotees and spiritual seekers each year. This conclave aims to showcase Ayodhya as a leading spiritual tourism destination and highlight its potential for sustainable development.

Our commitment at PHDCCI to promoting spiritual tourism is unwavering. We believe that spiritual tourism not only contributes to economic growth, but also plays a vital role in preserving our cultural and spiritual heritage. By fostering sustainable tourism practices, we can ensure that these sacred sites are protected and cherished for future generations.

This report on Spiritual Tourism will be a cornerstone of our efforts to promote this sector. The report will provide a comprehensive analysis of the current landscape, identify opportunities and challenges and offer actionable recommendations for stakeholders.

As we embark on this journey, let us work together to create a robust ecosystem for spiritual tourism that benefits all stakeholders, including local communities, tourists and the environment. The discussions and collaborations at this conclave will undoubtedly pave the way for innovative strategies and partnerships that will drive the growth of spiritual tourism in India and beyond.

I extend my sincere thanks to all our partners, speakers and participants for their dedication and support. Let us make this conclave a resounding success and take significant strides towards promoting spiritual tourism as a key driver of sustainable development.

(Dr. Ranjeet Mehta)

"Voice of Industry & Trade"

Foreword by KPMG in India

This report on “Sacred Journeys: Unfolding the evolution and growth of Pilgrimage and Spiritual Tourism in India” explores the significance and evolution of religious & spiritual tourism in India, emphasizing its cultural, economic, and technological aspects.

India, with its huge treasure of religious sites, has seen a significant surge in spiritual tourism since Covid-19 pandemic, drawing both domestic and international visitors. It accounts for nearly 60% of domestic tourism in India.

Spiritual tourism, aside from its economic advantages for the destination, has a profound social impact on individuals and communities. In today's fast-paced, social media-centric world, people of all ages and backgrounds embark on spiritual journeys to cultivate mindfulness and conscious awareness. Beyond personal transformation, spiritual tourism fosters a sense of global citizenship and interconnectedness. Globally, people look to India, renowned for its ancient healing practices and alternative therapies. It's no surprise that Rishikesh is attracting an unprecedented number of tourists for its centuries-old tradition of Ayurveda, yoga, and meditation.

As India continues to develop and modernize, the demand for spiritual tourism is anticipated to

increase. It is crucial to understand the various motivations of different pilgrim segments and offer tailored solutions to enhance outreach. By developing and maintaining infrastructure, conducting effective outreach, and promoting religious circuits, India can attract a diverse range of pilgrims and travelers seeking spiritual enlightenment and cultural enrichment.

The growth in tourism also brings with it challenges such as over-tourism, cultural sensitivities, and economic disparities. This report underscores the necessity of sustainable tourism practices to maintain the sanctity and integrity of religious sites. It also emphasizes the importance of digital tools, infrastructure improvements, and the promotion of lesser-known religious sites to enhance the spiritual tourism experience. Additionally, it highlights the potential of integrating religious tourism with other forms of tourism, like adventure and wellness tourism, to attract a broader spectrum of travelers.

Overall, the report underscores the importance of adapting to modern trends and technologies to sustain and grow spiritual tourism in India.



Vivek Agarwal
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Infrastructure Advisory



Executive summary

Pilgrimage and spiritual tourism is a rapidly growing sector within the global tourism industry, reflecting the increasing interest in cultural, spiritual and faith-based travel. India, home to over 450,000 religious and cultural heritage sites, is a treasure trove of pilgrimage and spiritual landmarks. While some sites enjoy widespread recognition due to organic outreach, countless lesser-known religious destinations remain largely unexplored, hidden gems within local communities. However, religious fervor accounts for over 60% of domestic travel in India and especially post pandemic, spiritual tourism has taken center stage with a significant increase in the number of travelers worldwide. This report examines the key drivers of pilgrimage and spiritual tourism, its economic impact, and the challenges and opportunities it presents for destinations.

The concept of religious tourism is evolving, to meet the changing interests and values of modern travelers. In the current scenario, increased digital influence has transformed how pilgrims access information about religious sites and how they want to participate in rituals. Virtual pilgrimages have gained popularity during and post pandemic. The convergence of improved infrastructure, enhanced experiences, changing trends has acted as a catalyst for the rise of spiritual tourism in India.

With an estimated increase in spiritual tourism in India, it is imperative to understand the push and pull factors of different segments of pilgrims and provide tailor made solutions to support outreach. However, it is also crucial to understand the risks and sensitivities attached to pilgrimage tourism so that the solutions can be drawn accordingly to make the experience respectful, sustainable, and beneficial for both visitors and host communities.

The surge in religious tourism also poses challenges such as overcrowding at the sites, strain on local resources etc. This report presents solutions to address the challenges and maximize the benefits of religious tourism, such as carrying capacity-based development initiatives at shrine, precinct and destination level, diversification of products at the destinations and holistic development of the sites, improving accessibility of sites, ensuring safety and security at sites, engaging local communities,

comprehensive approach to increase the outreach of lesser known religious destinations in the country, use of digital interventions for destination management & enhancing the experience of pilgrims and tourists etc.

Further, to provide an extensive analysis, the report includes case studies and examines the factors which have led to development of the sites in a holistic and comprehensive manner.

In conclusion, pilgrimage and spiritual tourism offers significant potential for economic growth and cultural exchange. By embracing a sustainable and holistic development model, destinations can harness this potential while preserving their cultural and religious heritage for future generations.





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1. Safeguarding spiritual significance of cultural heritage for future generations



Since the beginning of time, religious heritage has acquired an indomitable space in the Indian subcontinent. Sacred sites are the oldest-protected areas that safeguard cultural and biological diversity for present and future generations according to the UNESCO MAB Programme. Sacred and religious heritage sites capture a range of cultural and natural diversity, and each can singularly demonstrate the spirit of a particular place.

1.1. Repository of cultural richness

Approximately 20 per cent¹ of the properties inscribed on the World Heritage List have some religious or spiritual connection. Religious tourism in India witnessed a surge in recent years, drawing pilgrims and travelers from across the globe. 10 of the 42 UNESCO World Heritage Sites in India fall under the religious heritage category. Additionally, there are numerous (around 4,50,000 plus²) temples,

mosques, gurudwaras, churches under the custody of religious endowments and trusts in the country.

Understanding the continuing nature of religious and sacred heritage; possessing the capacity to protect authenticity and integrity, including a religion's spiritual significance; and sharing knowledge about ancestry, are three pillars essential for carrying forward heritage.

1.2. Shared values

Travelling for religious purposes is an age-old tradition, deeply rooted in India. Before constant digital communication/connections, traditional practices of storytelling, reading sacred texts and scriptures about temples/shrines was the main source of carrying forward myths, legends, traditions and one's religious heritage. Heritage recorded in ancient scriptures were the source of awareness and

inspiration for religious pilgrims and communities coming together, acting as a pivot in social life.

As older forms of teaching, passing information, knowledge, and history lose significance in the world of digital communication, safeguarding religious heritage of value to ensure spiritual continuity requires newer forms of circulation.



1. KPMG analysis

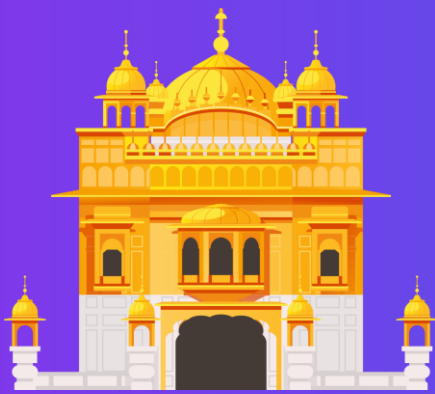
2. Working group report on improving heritage management in India, NITI Aayog, Govt. of India

2. Potential of religious and spiritual tourism in the country



Religious tourism accounts for over 60 per cent of domestic travel in India. A total of 1,433 million domestic tourists visited Indian pilgrimages in 2022, while 6.64 million foreign visitors arrived. The number of people in 2021 was 677 million, while the number of people in 2020 was 1.05 million.³

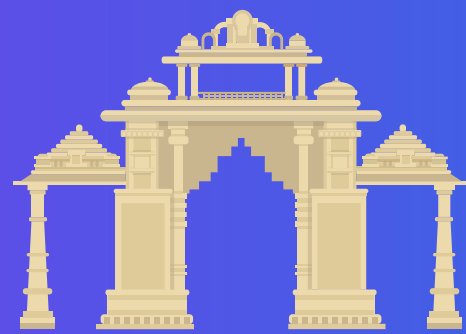
Post – pandemic boom In spiritual travel



Golden Temple, Punjab

1lakh

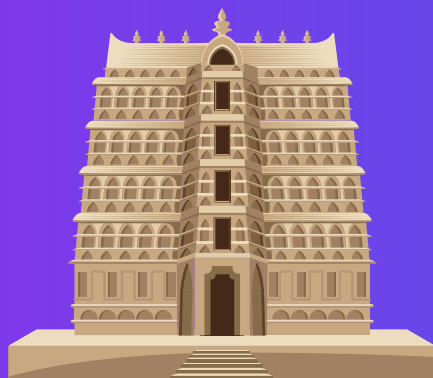
Daily visitors have increased post pandemic



Vaishno Devi Shrine, J&K

32K-40K

Daily visitors in 2022 compared to 10,000-15,000 pre-pandemic



Guruvayur Devaswom, Kerala

6K-7K

Daily visitors in 2022 against 4,000 pre-pandemic



Top religious spots

Char Dham yatra, Do Dham yatra, Vaishno devi, Venkateswara Temple, Golden Temple, Ajmer Dargah Sharif and Valenkanni Church

Source 1: ET report August 2022

3. Ministry of Tourism Statistics, 2023

Post-pandemic, spiritual tourism has taken centre stage with a significant increase in the number of travellers worldwide. For instance, the Vaishno Devi Temple receives 32,000 to 40,000 pilgrims each day, up from 10,000 to 15,000 during the same period prior to the pandemic. Meanwhile, at least one-lakh people visit the Golden Temple in Amritsar daily, higher than in the pre-pandemic period. A similar phenomenon is observed in the south at the Guruvayur Temple in Kerala, where daily visitors range from 6,000 to 7,000, compared to the pre-pandemic tally of 4,000.⁴

It is estimated that the travel and tourism industry alone employ more than 80 million people in India, with a year-on-year growth rate of more than 19 per cent and revenue of more than USD234 billion in 2022 alone.⁵

The global religious tourism market is estimated to reach USD2.22 billion by 2032 with a CAGR of 6.25 per cent⁶.

Religious tourism is a substantial driver of employment and economic activity both on a global scale and within India. By 2030, more than one hundred million people will be gainfully employed through temporary and permanent jobs driven by India's spiritual tourism alone, which is anticipated

to be worth around USD59 billion by 2028.⁷

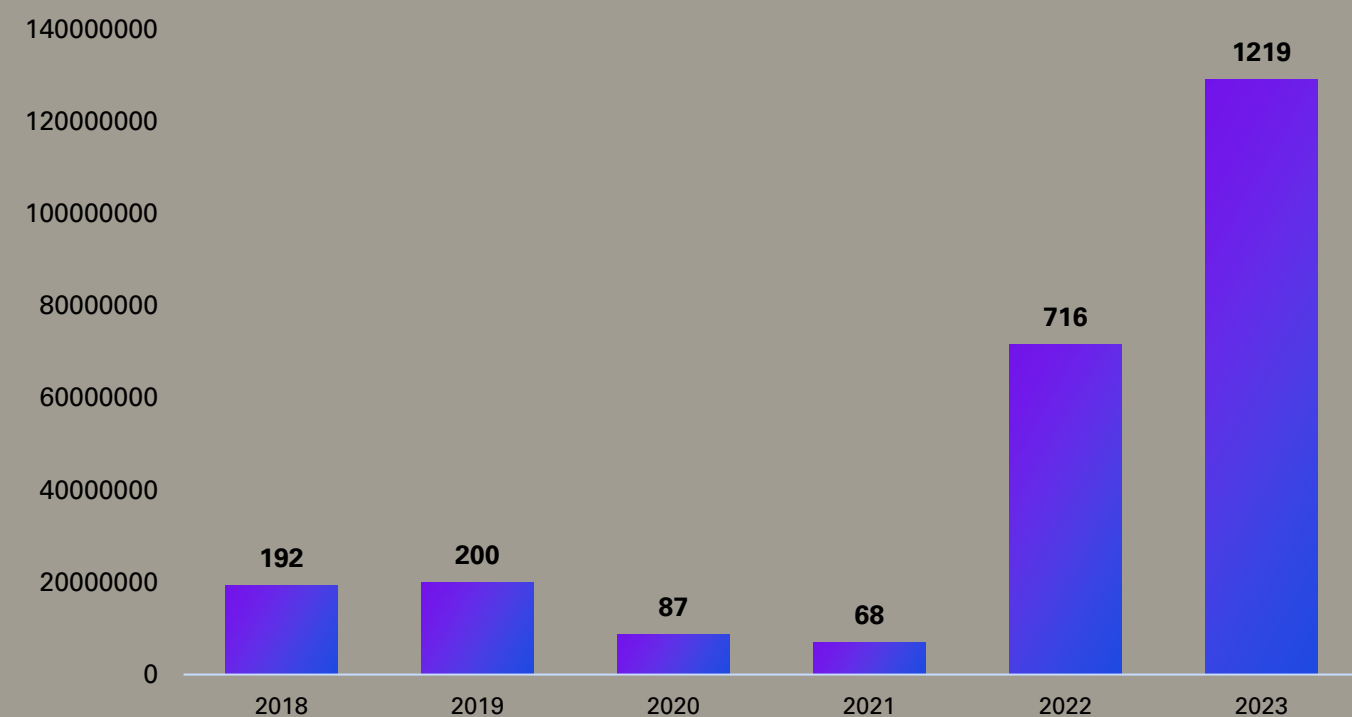
The Kashi Vishwanath Temple draws several types of visitors, including spiritual seekers who flock to offer prayers and seek blessings. The surge in religious tourism increased following the revamping of the Kashi Corridor. According to the official website of Uttar Pradesh Tourism Department, the city has seen a remarkable increase in tourist numbers since before the COVID-19 pandemic. In 2019, the city had nearly 6.8 million tourists. By 2022, this number skyrocketed to almost 72 million, which is more than ten times the pre-pandemic figure. During the pandemic in 2020, tourist numbers had dropped to fewer than 1 million. The below chart represents the domestic and foreign tourist that travelled to Varanasi.

4. ET report, August 2022

5. E-journal Times Magazine March 28, 2023

6. SPER Market Research

7. Spiritual Tourism in India: Analyzing Economic Impact and Growth Potential, IBEF Report, May 2024

Figure 1: Domestic Tourist Footfall in Varanasi (In Lakhs)

Source: UP Tourism



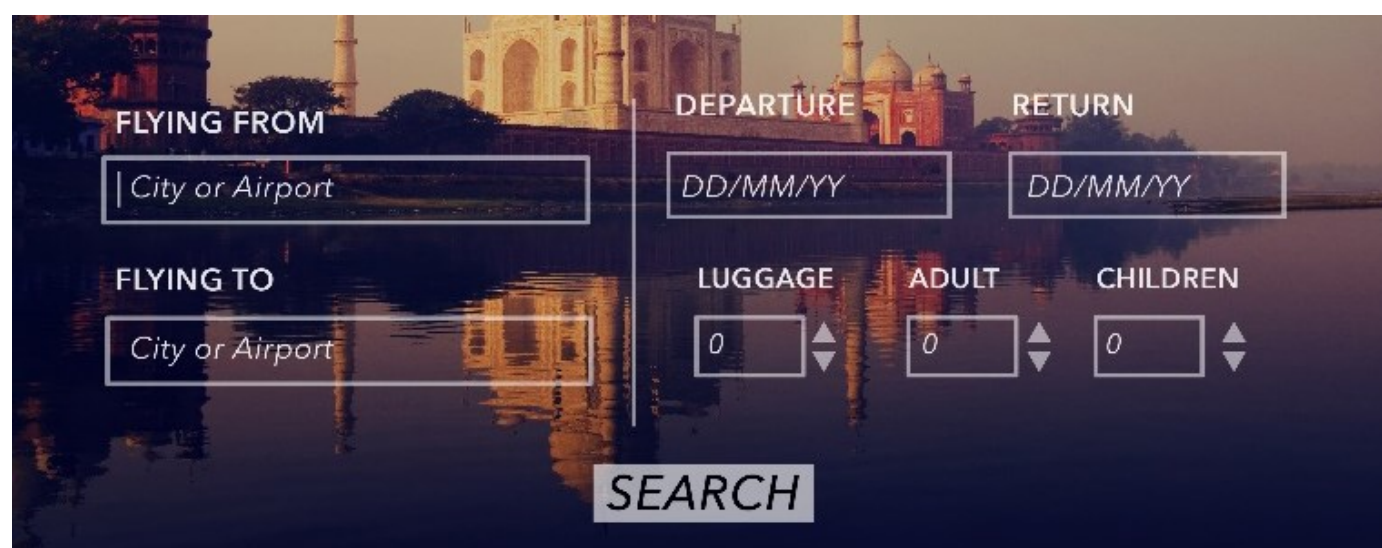
3. Evolution of religious tourism- new approaches to the concept of religious tourism



The concept of religious tourism is evolving, to meet the changing interests and values of modern travelers and reflects a broader shift towards more meaningful, responsible, and transformative travel experiences.

3.1. Digital Influence on selection of sites

Modern trends in religious tourism in India reflect the intersection of tradition with contemporary practices and technology. In the current scenario, increased digital influence has transformed how pilgrims access information about religious sites. An increase in the number of travel bloggers has positively impacted the surge of religious tourism in the country, due to which, devotees can discover new places to visit and learn about their significance through posts, photos and videos shared by other users. Reviews and personal recommendations/vlogs influence travelers decisions on where to take their next spiritual journey.



FLYING FROM
| City or Airport

FLYING TO
City or Airport

DEPARTURE
DD/MM/YY

RETURN
DD/MM/YY

LUGGAGE
0

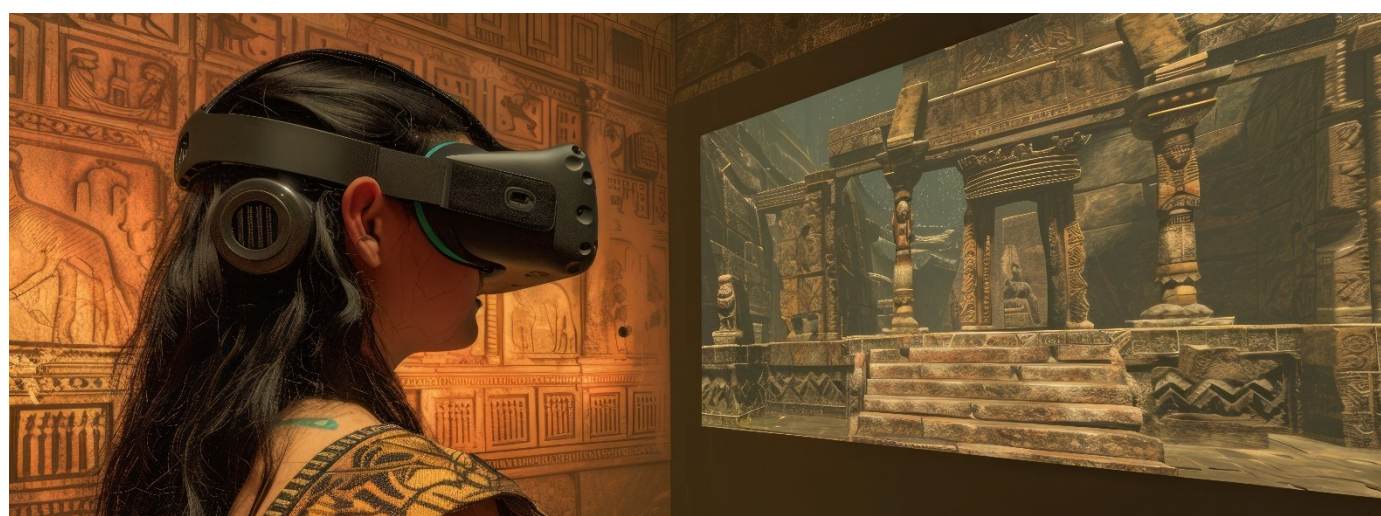
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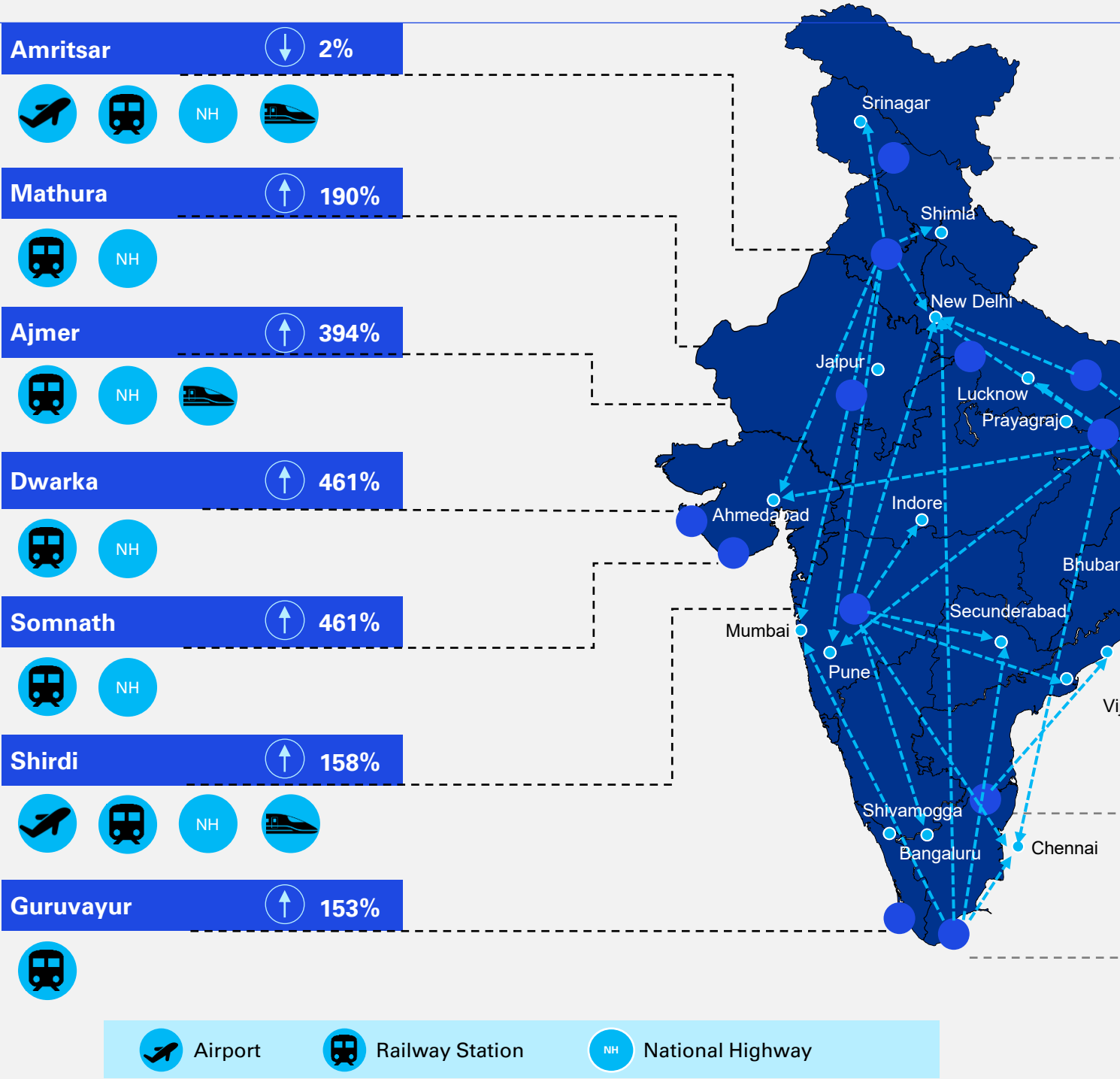
3.2. Digital pilgrimages and virtual reality

Especially relevant during COVID-19 pandemic, virtual pilgrimages have gained popularity. In post pandemic era, inclination to travel became a must for every travel enthusiast. Live streaming of religious ceremonies, online darshans and 360-degree virtual tours allow devotees to participate remotely. Post the pandemic, there is rise in footfall of spiritual travelers. Many pilgrims combine religious visits with medical treatments or wellness retreats. Ayurvedic centers, yoga retreats and spiritual healing practices are integrated into religious tourism offerings.



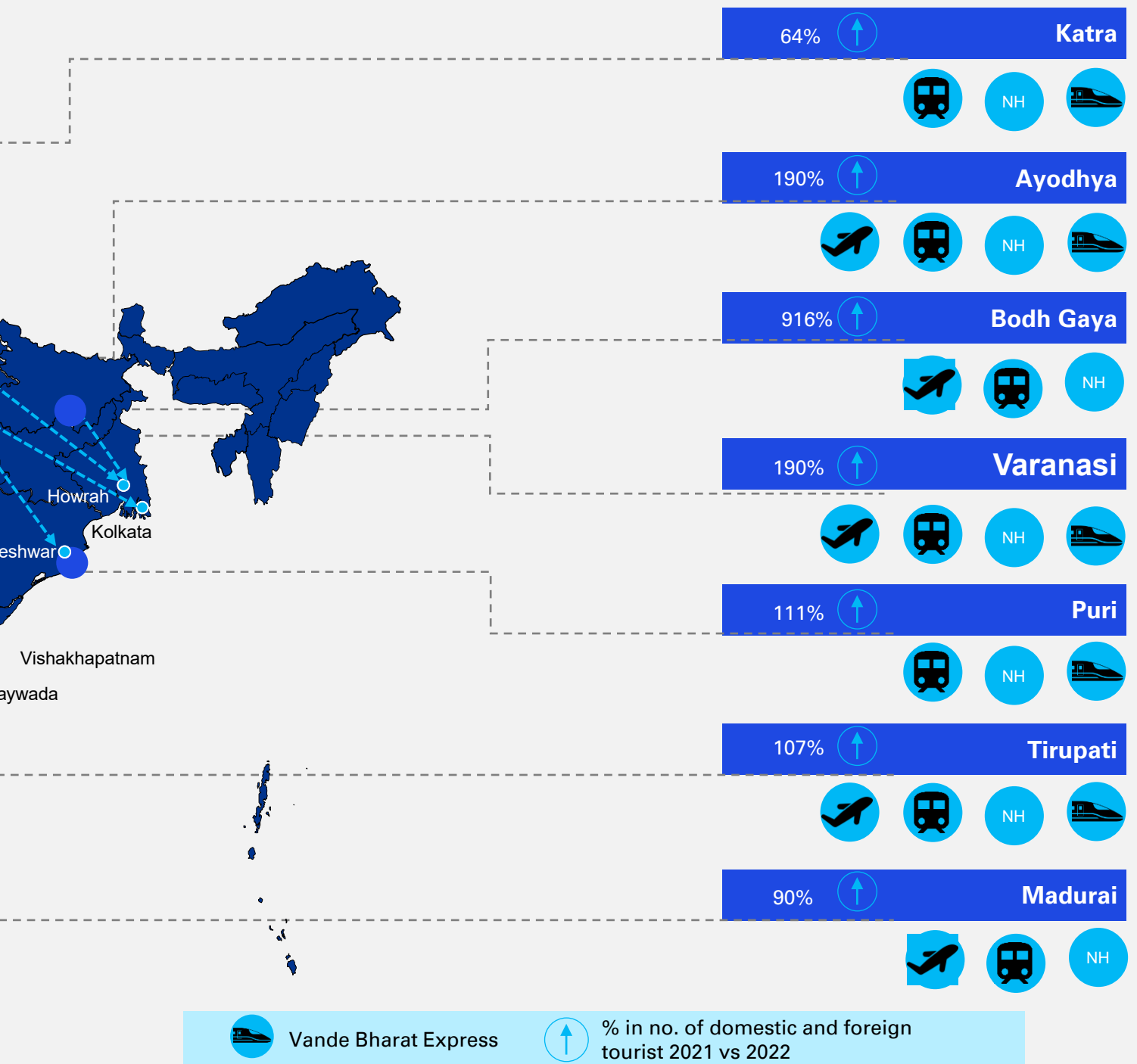
3.3. Better connectivity and supporting Infrastructure

Better connectivity from major Indian cities is another significant reason people begin to visit the pilgrim sites. The government of India has launched various schemes to help improve the infrastructure of pilgrimage and tourist destinations. The improved physical accessibility to destinations, Ecosystem of travel and facilities like hotel to stay, amenities, tours and travel packages have helped visitors in making impromptu decision to travel to any destination.



Source 2: Ministry of Road Transport and Highways Ministry of Tourism, CBRE Research, 2024

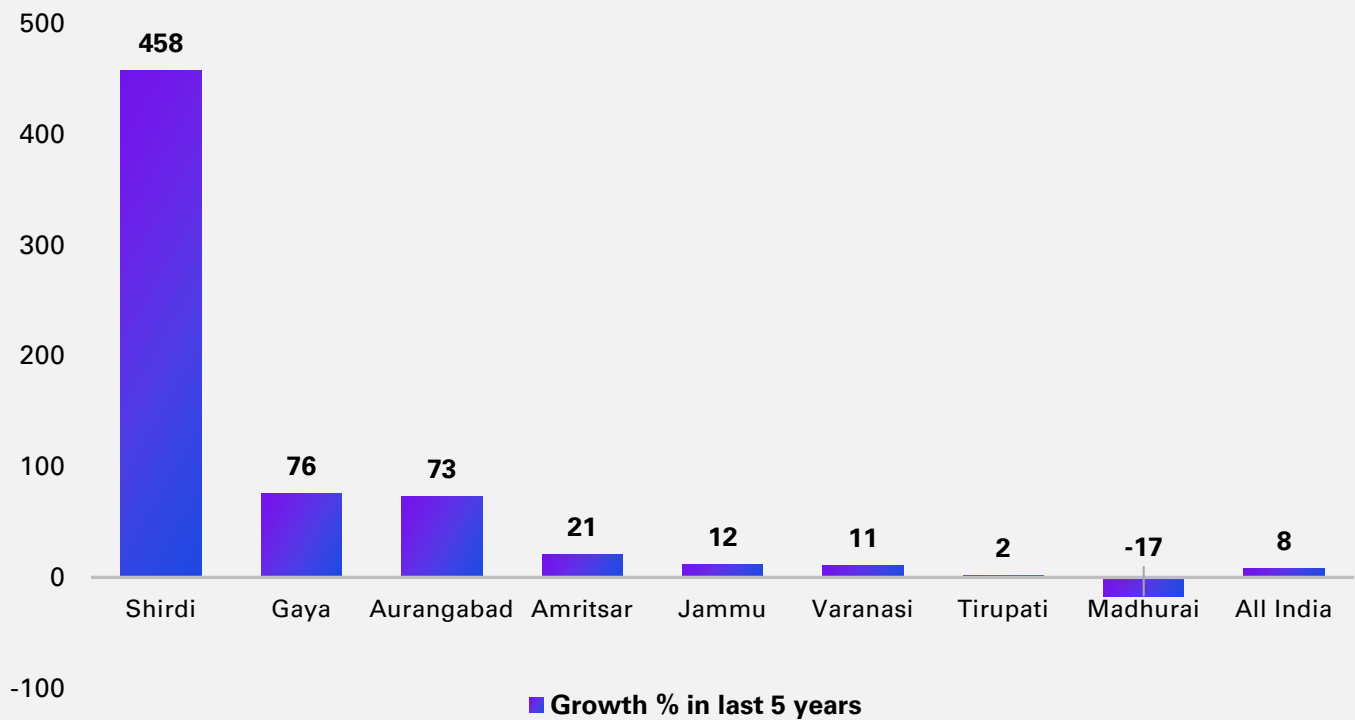
8. Ministry of Road Transport & Highways Ministry of Tourism, CBRE Research, 2024



India has witnessed increased religious sentiments in the last few years, and this plays a crucial role in attracting people from diverse backgrounds. The convergence of improved infrastructure, exciting

experiences, and a growing need for inner tranquility has acted as a catalyst for the rise of spiritual tourism among young people in India.

Figure 2: footfall at select airports



Source 3: Mint

3.4. Diversification of products

Given the noticeable trend towards spiritual tourism among the youth, influenced by an amalgamation of wellness, meditation, and spirituality at religious destinations, there's a fresh perspective to be considered in promoting these sacred sites. This surge in interest not only highlights a spiritual inclination but also a desire to deeply immerse in the historical essence of these places. Young travelers seek to 'relive' history, making it crucial to look at religious tourism not just as a journey of faith but as an educational and cultural exploration. By emphasising the preservation of religious heritage sites, offering educational programmes, integrating wellness practices, and providing immersive cultural experiences, spiritual tourism can cater to the youth's growing interest in spirituality, history, and personal growth.



4. Segments of pilgrimage tourism



Identifying different categories of pilgrims and acknowledging unique needs of various groups is vital for enhancing the pilgrimage experience, managing resources effectively, and promoting sustainable tourism practices. Pilgrimage tourism can be broadly categorised into three segments of believers -- explorers, solo-travelers, and mass organised pilgrims:

4.1. The explorer

This segment of pilgrims embarks on a journey to seek spiritual experiences. They often travel to a holy land, not necessarily to a shrine as they yearn experimental spiritual experiences that offer substitutes. These tourists can often be regarded as ‘seekers or explorers,’ as they are visitors to sacred sites with the motive of getting away on holidays irrespective of the religious importance of time in

performing pilgrimage. According to a recent report, 94 per cent of Indian respondents want to travel to a lesser-known destination.⁹

Explorers seek interactions with local communities, to merge into the urban/local fabric and be a part of the host culture. Holy places like Himachal Pradesh, Rishikesh, Varanasi, etc., draw most pilgrims from this segment.

Amritsar

 Existing Branded Hotels

Class	Existing	Upcoming
Luxury	150+	-
Upper Upscale	610+	470+
Upscale	270+	760+
Upper Midscale	1100+	550+
Economy	820+	130+
Key Brands	Taj, le Meridian, Hyatt	Marriott, Radisson



Ajmer

 Existing Branded Hotels

 Yoga/ Meditation Centers

Class	Existing	Upcoming
Upscale	150+	-
Upper Midscale	70+	-
Midscale	230+	80+
Economy	230+	-
Key Brands	Taj, Royal Orchid, The Fern, Wyndham	-



Somnath

 Existing Branded Hotels

 Yoga/ Meditation Centers

Class	Existing	Upcoming
Luxury	15+	-
Upscale	40+	-
Upper Midscale	70+	-
Midscale	240+	50+
Economy	20+	-
Key Brands	The Postcard	Lemon Tree



Katra

Existing Branded Hotels



Yoga/ Meditation Centers

Class	Existing	Upcoming
Upper Upscale	70+	120+
Upscale	280+	-
Upper Midscale	500+	-
Midscale	360+	-
Economy	370+	-
Key Brands	Taj, Radisson, ITC	Marriott

**Ayodhya**

Existing Branded Hotels



Yoga/ Meditation Centers

Class	Existing	Upcoming
Luxury	40+	-
Upper Upscale	-	250+
Upscale	-	100+
Upper Midscale	80+	-
Economy	70+	120+
Key Brands	Radisson	Marriott, Taj, Ginger

**Bodh Gaya**

Existing Branded Hotels



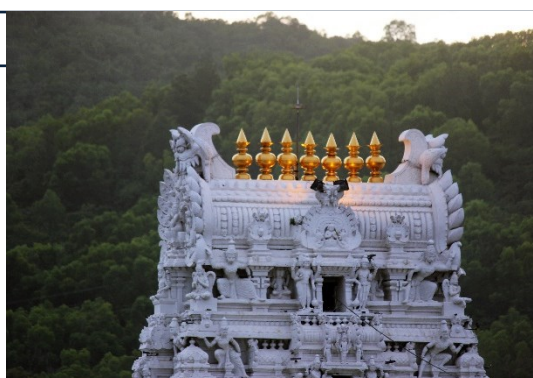
Yoga/ Meditation Centers

Class	Existing	Upcoming
Upscale	70+	
Upper Midscale		70+
Midscale	150+	
Key Brands	Hyatt, Sarovar Premiere	

**Tirupati**

Existing Branded Hotels

Class	Existing	Upcoming
Luxury	100+	115+
Upscale	310+	
Upper Midscale	380+	
Midscale	90+	
Economy	710+	
Key Brands	Taj, ITC	Oberoi, Taj



Source 4: Ministry of Road Transport and Highways Ministry of Tourism, CBRE Research, 2024

The growing interest in health and wellness presents opportunities for businesses to offer specialised services, including wellness retreats, spa treatments, and health-focused travel experiences.

Increasing desire for authentic experiences provides opportunities for cultural exchange programmes,

local immersion initiatives, and unique, offbeat attractions and set up experiences that create add-value to a product or service, such as including stories, music, food, and other aspects associated with the destination. Destinations offering suitable infrastructure and services for remote workers can attract long-term visitors.

4.2. Solo traveler

Solo pilgrims embark on trips for various reasons. Most pursue solo travel for spiritual enlightenment, self-discovery, and test their resilience. Such journeys offer deep introspection, challenge personal limits, and the offer the opportunity for transformative growth.

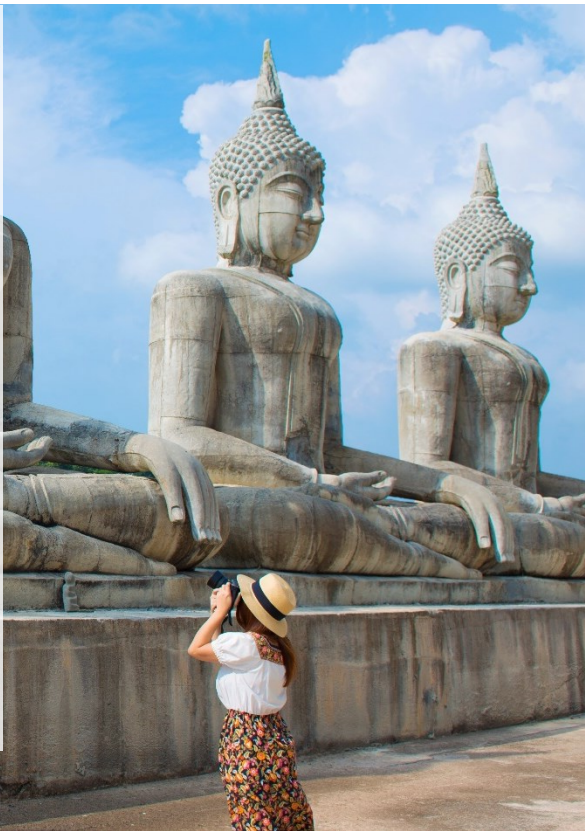
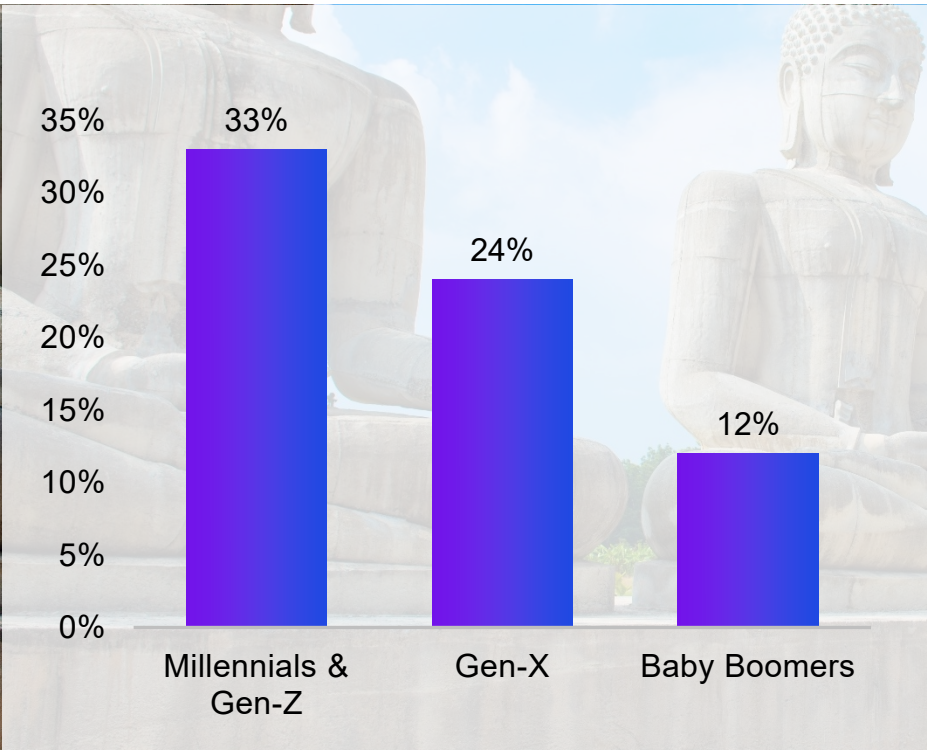
Meditating in nature, developing a routine, maintaining the discipline to practice is what activities most solo travellers discover. Per a recent study, solo travel is gaining popularity among the new generations. According to the survey, most took solo trips to reconnect with self.¹⁰

Engaging with local customs, rituals, and traditions allows solo travelers to gain a deeper appreciation

for the cultural diversity and forge meaningful connections with people from different backgrounds.

A major pull-factor for solo travelers to revisit certain shrines or ashrams is often rooted in the fulfilment and gratitude gained from participating in acts of service (seva). Whether assisting in temple rituals, serving meals, or joining community outreach efforts, such activities deepen connections with the community and embody the transformative essence of compassion and generosity. Notable examples include volunteering for flower decoration or crowd management at sites like the Tirumala Venkateswara Temple or engaging in organic farming and environmental projects at spiritual retreats

Figure 3: Percentage of Solo travelers



Source 5: American Express Travel Trends report 2024

10. American Express Travel Trends report 2024

4.3. Organised mass pilgrimage

Group tours or organised pilgrimage tourism, characterised by large groups of travelers embarking on sacred journeys to holy sites and destinations of religious significance, has become a prominent aspect of the global tourism industry.

The structure of organised pilgrimages often includes guided tours, group activities, and religious ceremonies, aimed at providing a cohesive and meaningful experience for devotees.

Mass organised pilgrimage tourism offers participants the opportunity for spiritual enrichment, communal worship, and cultural exchange. Pilgrims are drawn to organised tours so as to also connect with like-minded individuals and experience the

collective energy of religious devotion.

Group activities such as prayer services, rituals, and pilgrim processions foster a sense of unity and shared purpose among participants. The activities are mostly centered at the core-area of the shrine or religious destination.

Many religiously inclined people prefer to have family and community gatherings as organised group pilgrimage to a particular shrine of significance to them. While many are motivated to visit a holy place with family and friends as a regular tradition and promise after-wish fulfillment, religious motivation proves to be a great pull-factor in this case.



4.4. Understanding the risks and sensitivities attached to religious tourism- for need of working towards sustainable travel alternatives.

Religious tourism, while offering rich experiences and deep spiritual fulfillment, is also fraught with risks and sensitivities that require careful consideration and management. Understanding such factors is crucial to ensure that religious tourism is respectful, sustainable, and beneficial for both visitors and host communities.

- **Cultural sensitivities-** Navigating cultural sensitivities at religious destinations is crucial for respectful engagement, focusing on respecting religious practices and managing the commercialisation of sacred sites. Tourists may unintentionally disrespect local customs through inappropriate clothing, behaviour, or interference in ceremonies due to unfamiliarity. Moreover, while tourism brings undeniable economic benefits, unregulated commercial activities at sacred sites can compromise their spiritual essence and distance local worshippers.
- **Economic disparities-** Economic disparities in religious tourism present challenges, such as inequitable growth and exploitation. The uneven distribution of economic benefits can create disparities and conflicts within local communities. Additionally, there's a risk of dilution of local culture and traditions for profit, potentially commodifying religious practices and undermining their authenticity.
- **Vulnerability to conflicts-** Religious sites, often at the intersection of deep spiritual significance and historical contention, can become flashpoints for political and religious conflicts. This reality poses heightened safety risks for visitors, emphasising the critical need for stringent security measures and meticulous planning to safeguard these sacred spaces and its visitors. The sensitivity surrounding discussions on religion further complicates interactions within these contexts. Diverging beliefs and emotionally charged dialogues can swiftly lead to disputes, as religious beliefs are deeply ingrained and personal for many. Consequently, in efforts to avert confrontations and uphold social harmony, numerous individuals opt to abstain from engaging in religious discussions in mixed settings. This cautious approach mirrors a wider societal inclination towards fostering respectful, peaceful coexistence amidst diverse belief systems.



Ensuring the long-term sustainability and preservation of religious sites amid increasing tourist footfall is a significant challenge. India has a rich heritage of religious sites across the country. Many ancient shrines were built dependent on the visitor footfall at that time. Considering today's ease of travel, population, and a surge in travel to religious sites, these sites have limited-carrying capacity within their premises.

Tackling over-tourism in religious tourism destinations while respecting sensitivities inherent at such sites involves a multi-dimensional approach. The impact of over-tourism can indeed be devastating, affecting destinations culturally, environmentally, and socially. Some negative effects highlighted below underscore the importance of sustainable tourism practices to mitigate over-tourism's adverse impacts.



- **Cultural dilution-** The essence and authenticity of religious practices and ceremonies can be diluted by the commercialisation that often accompanies over-tourism. Sacred rituals may become performances for tourists, diminishing their spiritual significance.
- **Infrastructure strain-** Local infrastructure, including roads, public transport, and sanitation services, are overwhelmed by the demands of excessive pilgrims/tourist numbers, leading to deterioration in quality of life for residents and potentially deterring pilgrimage activities.
- **Environmental degradation-** The natural surroundings of many religious sites can suffer under the strain of over-tourism, with issues such as littering, pollution, and habitat disruption becoming prevalent. This degradation not only affects the ecological balance but also the aesthetic and spiritual ambiance of the site.
- **Damage to heritage-** Increased foot-traffic and human activity pose a significant risk to the physical integrity of ancient temples, shrines and artifacts associated with religious sites. The wear and tear from over-tourism can result in irreversible damage to these invaluable cultural heritage assets.
- **Local community disruption-** The commercial benefits of tourism often lead to increased living costs in the area, including housing and basic goods, which can displace long-term residents. Furthermore, the daily lives and practices of the local community can be disrupted by the constant influx of tourists.

It is possible to address the challenges of over-tourism in religious tourism destinations thoughtfully and effectively. India needs to design mitigation measures so that it can protect the sanctity of religious sites, ensuring a respectful and enriching experience for all.

5. Digital infrastructure- Growing access to religious sites



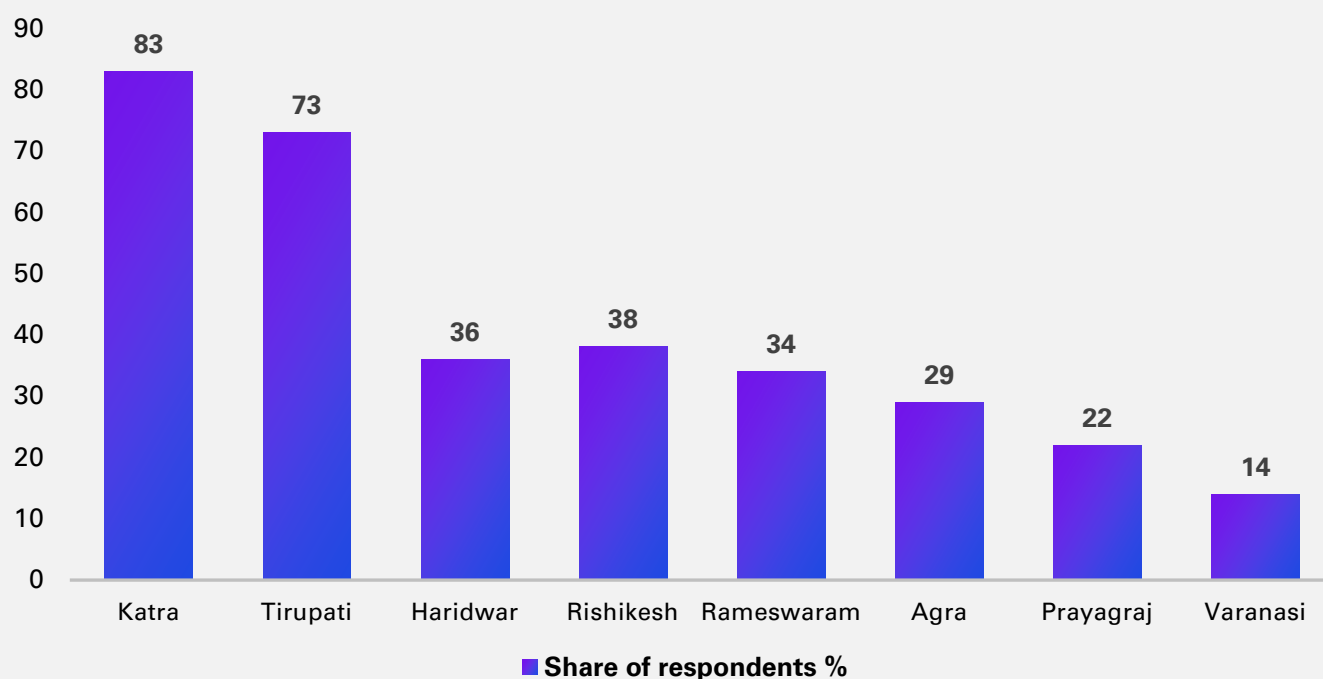
Over 50 per cent Indians are internet users; the active internet-base is expected to grow by 900 million by 2025.¹¹ With the wide-use of the internet, digital-platforms and tools have transformed and evolved the landscape of religious tourism in India.

5.1. Accessibility and awareness

Digital-platforms have much information about religious sites in India, easily accessible to the global audience. Pilgrims can now search destinations, historic backgrounds, rituals, and significance of religious shrines online before planning trips. Websites guide national and international tourists to explore destinations remotely before finalising the

itinerary. As the inclination towards spiritual tourism is increasing after the pandemic, a rise in online searches for religious destinations in India has been noted. According to a survey¹² conducted in India in March 2022, the most online searched religious city was Katra

Figure 4: Share of respondents of online searches for holy destinations



Source 6: Statistica

5.2. Augmented Reality (AR) apps

AR apps provide immersive experiences at religious sites by overlaying digital information onto physical environments. This enhances visitor's understanding of the cultural and historical contexts associated with such places.

11. www.thehindu.com, May 2023

12. Statistica

13. American Express Travel 2023 Global Trends report

5.3. Connectivity of like-minded people

Social-media platforms allow like-minded individuals to connect, share their journey experiences, and exchange spiritual insights fostering a sense of community and shared values. Furthermore, digital platforms enable communities of travellers to share recommendations, reviews, and tips, thereby enriching the journey planning process for others.

5.4. Promotion and marketing

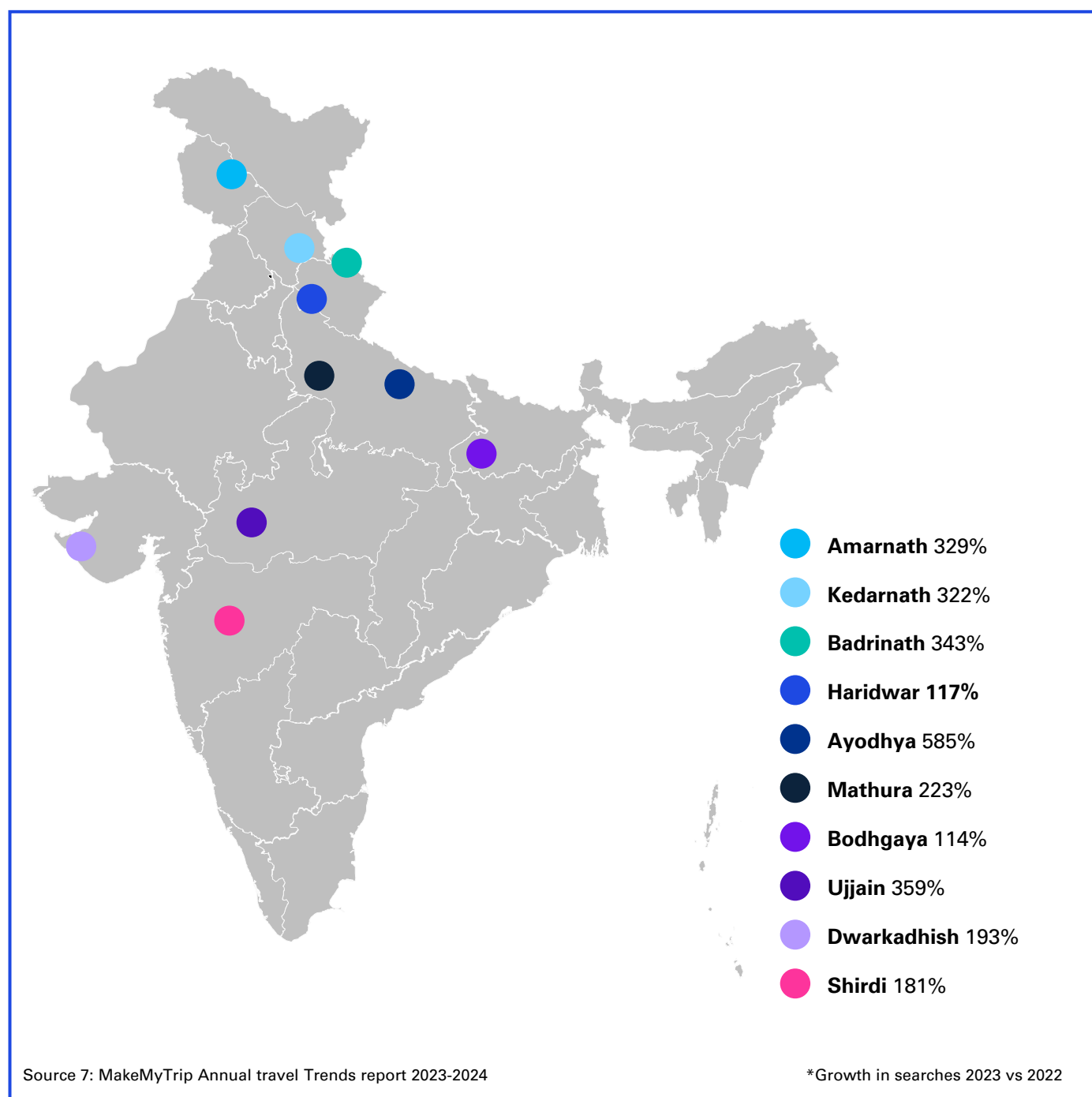
Government bodies, tourism boards and local stakeholders utilise digital-platforms to promote religious tourism in India through social media campaigns, online advertisements, and virtual events.



5.5. Digital tools to guide travelers

Versatile tools equipped with real-time navigation and directions (including timings, entry price, guidelines, etc.) guide pilgrims to religious sites, facilitating efficient exploration. Furthermore, online travel platforms and other travel-booking operators effectively help pilgrims plan journeys, accommodation, and other sight-seeing activities.

According to a recent report, tier-2 and tier-3 cities are embracing spiritual journeys, with searches for destinations with or around religious spots growing 97 per cent in the last two-years. Searches for Ayodhya grew by 585 percent, Ujjain by 359 percent and Badrinath by 343 percent in 2023 as compared to 2022.¹³



13. MakeMyTrip India Travel Trends Report, 2023

6. Solutions- Increasing outreach and sharing knowledge of common history



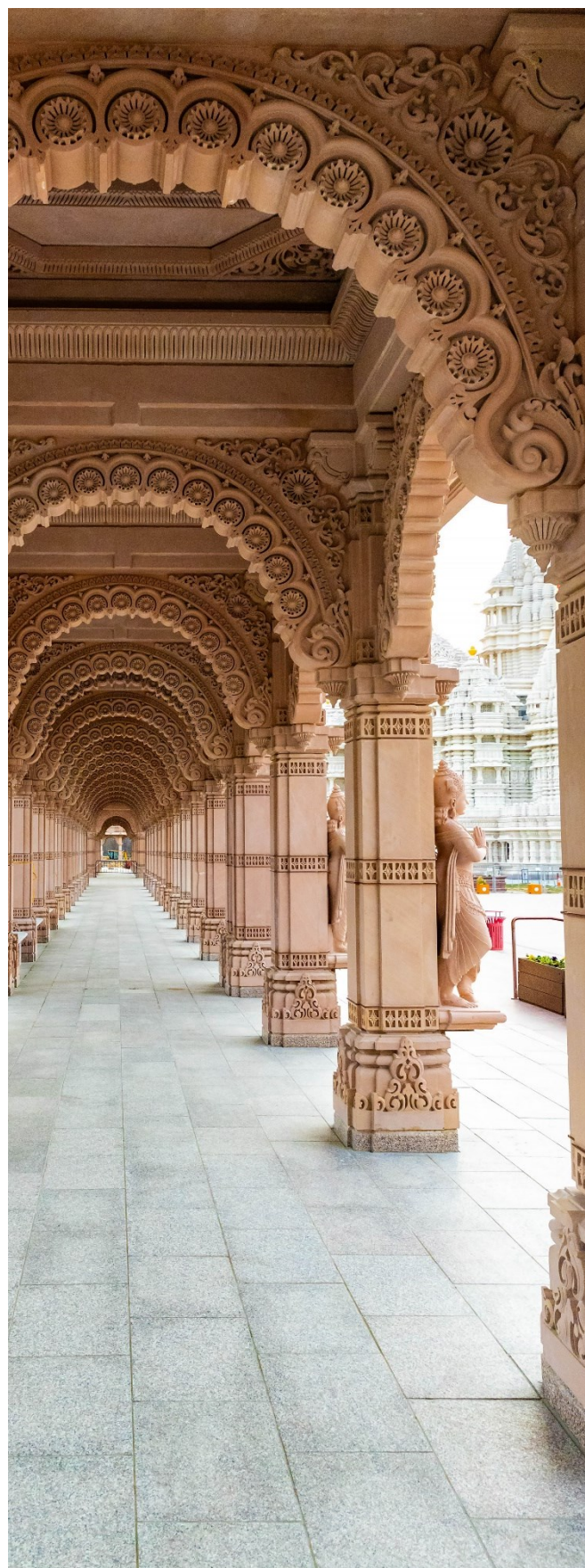
6.1. Holistic development of religious sites

Spiritual tourism in India is at a pivotal juncture, facing misconceptions that narrow its perceived appeal. Often seen merely as a venue for religious pilgrimage, its potential as a cultural and spiritual odyssey open to all is overlooked. Addressing these misconceptions is crucial to attract a diverse array of tourists seeking India's rich spiritual tapestry.

The rise of new traveller segments craving unique and unconventional experiences presents an opportunity to reframe religious tourism and mitigate the impacts of seasonal fluctuations in visitor numbers. By developing destinations along with tailored-tourism products (such as wellness-centres integrating Ayurvedic practices and holistic healing therapies, meditation-centres in serene and picturesque locations) India's sacred sites can be repositioned as centres for holistic travel experiences. For example, introducing heritage homestays in both urban and rural locales enables spiritually inclined explorers to immerse in the authentic lifestyle of local communities. Such experiences enrich the spiritual journey and broaden the allure of these destinations.

Furthermore, religious sites can be leveraged in campaigns like "wedinindia" and "meetinindia", extending their appeal beyond traditional segments to attract visitors from non-believer backgrounds. By showcasing these sites as vibrant cultural and spiritual hubs, India can captivate a wider audience, encouraging exploration beyond conventional religious pilgrimage.

With the emergence of new traveller segments seeking unique and offbeat experiences, there is an opportunity to integrate religious tourism with other forms of tourism. By combining adventure and wellness tourism at religious sites, these destinations can be promoted as holistic travel experiences. This approach not only enhances the appeal of religious sites but also diversifies tourism offerings, catering to a broader-range of travellers looking for immersive and meaningful journeys.



9. American Express Travel 2023 Global Trends report

6.2. Outreach for hidden gems/ lesser-known pilgrim destinations

India, home to over 450,000 religious and cultural heritage sites, is a treasure trove of spiritual landmarks. While some sites enjoy widespread recognition due to organic outreach, countless lesser-known religious destinations remain largely unexplored as hidden gems within local communities. Developing these under-the-radar sites involves a comprehensive approach to boost their visibility and appeal to a broader tourist demographic.



Research and documentation - Thorough research and documentation of a site's historical and spiritual significance is a foundational step, crucial for building a compelling narrative that can be shared with potential visitors, helping to elevate the site's profile and promote its unique attributes



Preservation and restoration - Improving physical infrastructure accessibility around these sites through careful preservation and restoration efforts is key to enhancing visitor experience. This can safeguard the site's integrity and make it more accessible and appealing to tourists



Local community involvement - Engaging local communities in the development process is vital for fostering sustainable tourism practices. By ensuring that economic benefits are equitably distributed. This approach nurtures a positive relationship between the sites and their surrounding communities. Initiatives could include training of locals as guides, promoting local crafts and cuisine, organizing cultural events or festivals related to the site



Educational programmes - Implementing educational programmes like guided tours, workshops, or lectures about a site's history and spiritual significance can attract tourists with a keen interest in cultural and spiritual enrichment. This educational approach adds depth to the visitor experience, making it more meaningful and memorable.

Highlighting these lesser-known sites serves the dual-purpose of enriching the tourist experience and alleviating pressure on more popular destinations.



6.3. Carrying capacity based development initiatives of religious places

To address the challenges of overcrowding at India's renowned spiritual destinations, a comprehensive approach encompassing destination-level measures, precinct-level strategies, and shrine-specific actions is essential. These measures aim to alleviate strain on local resources, preserve the sanctity of the shrines, and enhance the spiritual experience for all visitors.

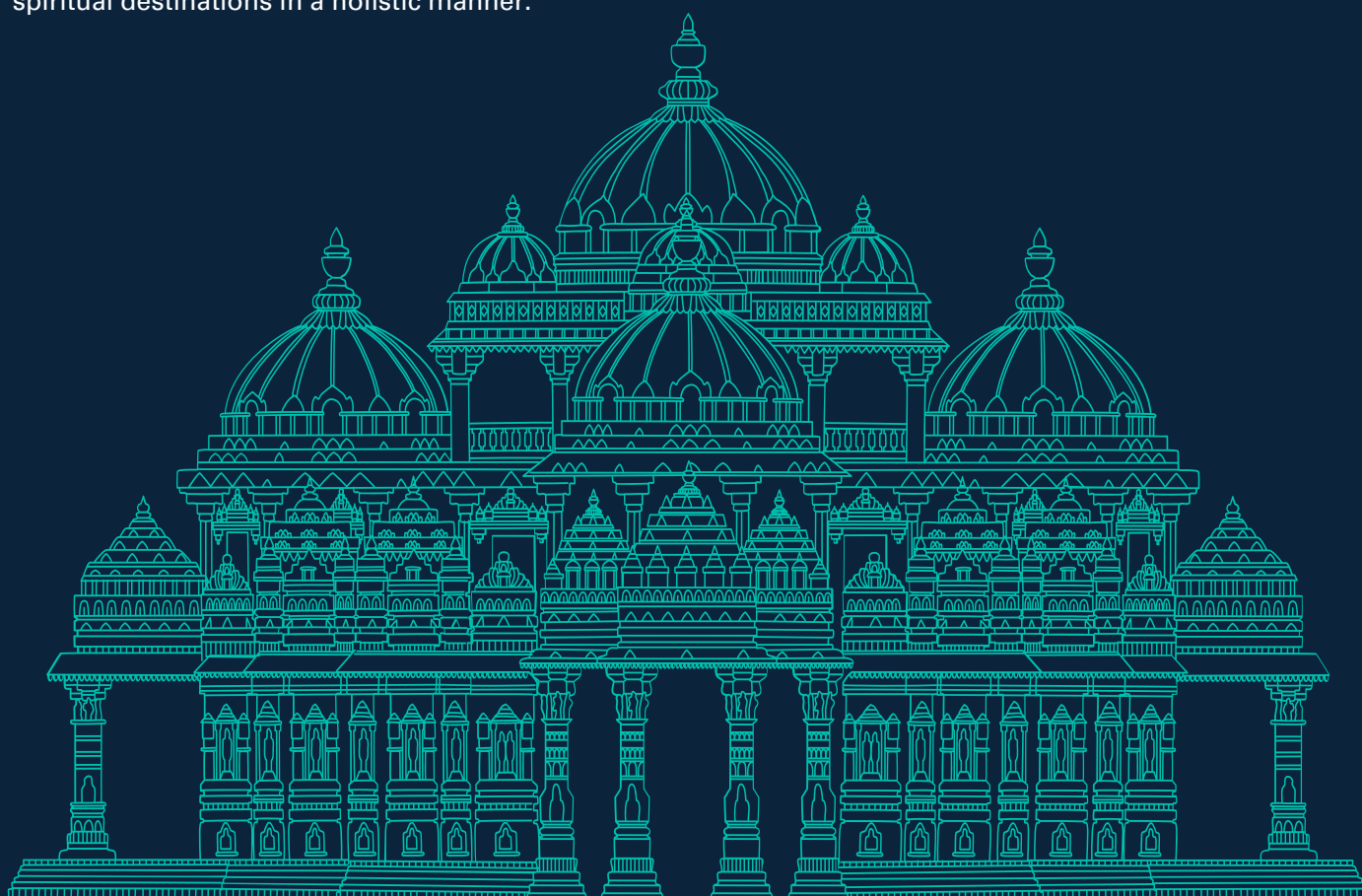
Destination-level measures (regulations and zoning in master plan) - Enacting regulations and identifying specific zoning areas within the master plan can help decentralise activities associated with mass gatherings. By directing some activities away from the shrine area, it's possible to reduce traffic-flow and avoid congestion within the main shrine surroundings

Precinct-level strategies - Encouraging visitors to travel during the off-peak season through targeted communication and incentives, can significantly improve their experience and foster a more even distribution of visitors throughout the year

Shrine-level actions –

- **Visitor registration and timed-entry:** Implementing a visitor registration system along with timed-entry tickets can effectively manage the flow of tourists, minimising overcrowding at any given time.
- **Queue management:** Proper queue management strategies, including designated waiting areas and clear signage, can enhance visitor management and reduce overcrowding
- **Capacity management:** Regularly assessing the carrying-capacity of shrines and adjusting visitor-limits accordingly ensures that the number of visitors remains sustainable over time.

By adopting these measures across different levels, it is possible to address the issue of overcrowding at spiritual destinations in a holistic manner.



6.4. Digital intervention

Virtual and Augmented Reality

Virtual and Augmented Reality (VR and AR) based interventions present innovative solutions to enhance the visitor experience at religious destinations in India. They offer immersive, educational, and accessible ways to explore these sacred sites and facilitate virtual pilgrimages. These technologies can address challenges such as overcrowding, preservation of sites, and inclusivity, while providing enriched, interactive experiences.

In case of Makkah, the immersive technologies used at the site are virtual-reality, augmented-reality, and mixed-reality. The concept of digital Hajj was presented in terms of virtual games to let users learn how to perform Tawaf and Umrah at the holy mosque of Makkah. Interventions help Hajj organizers manage pilgrims' mobility and provide directions to find lost pilgrims.

AR is a real-time, direct, or indirect view of a physical real-world that augments virtual computer-generated information. Devices like head-mounted displays, handheld displays, smartphones, and pdas (personal digital assistants) utilize sensors, digital compass, cameras, and GPS to guide a pilgrim on demand.

Destination management

Popular pilgrimage destinations experience multiple pressures related to, carrying-capacity, growth, sustainable use of natural and cultural assets. Artificial Intelligence (AI) and predictive analytics can significantly enhance the visitor experience at popular pilgrimage destinations by managing crowds more effectively and ensuring safety and enjoyment.

Some potential applications of AI at pilgrimage sites can be as follows.

- **Forecasting visitor numbers:** Utilise historical data to predict high-attendance periods, allowing for better planning and resource allocation
- **Resource optimisation:** Allocate security, medical, and sanitation services more efficiently based on predicted crowd sizes
- **Crowd and traffic management:** Analyse real-time data to monitor and manage crowd density and movement, reducing bottlenecks and maintaining safety
- **Improving visitor experience:** Offer recommendations on the best-visiting times to spread out visitor numbers and minimise waiting time

- **Personalised guidance:** Provide tailored-recommendations to visitors based on their preferences and real-time conditions
- **Enhanced security and emergency management:** Use predictive analytics for pre-emptive security measures and effective emergency evacuation strategies.

Adopting AI and predictive analytics, with collaboration among local authorities, religious institutions, and technology providers, can help in transforming the potential of pilgrimages destinations.

Social digital platforms

Film-tourism and adventure-tourism are examples of different segments that collaborate with religious tourism to promote a destination. Many televised shows and video-blogs by famous personalities also promote cuisine varieties discovered at destinations.

For this purpose, social-media vloggers greatly contribute to shaping the image of a destination. They tap into the culture to understand the heritage significance, the local cuisines, crafts, artefacts, bookstores, traditional apparel, etc. that can be promoted. Local cafes, authentic restaurants are generally discovered and promoted on social-media, sparking curiosity in other travel enthusiasts to include in their must-visit destination and further promote with good reviews.

The solutions cater to promotion of the hidden gems of cultural, spiritual and religious importance in India while establishing sustainable practices for development of pilgrimage tourism sites. By addressing the challenges of carrying capacity of the holy sites, promotion of digital platforms and digital tools the Holy sites can accommodate the increasing footfall of the pilgrims in the coming years and lead to more meaningful experiences for the pilgrims.



Appendix

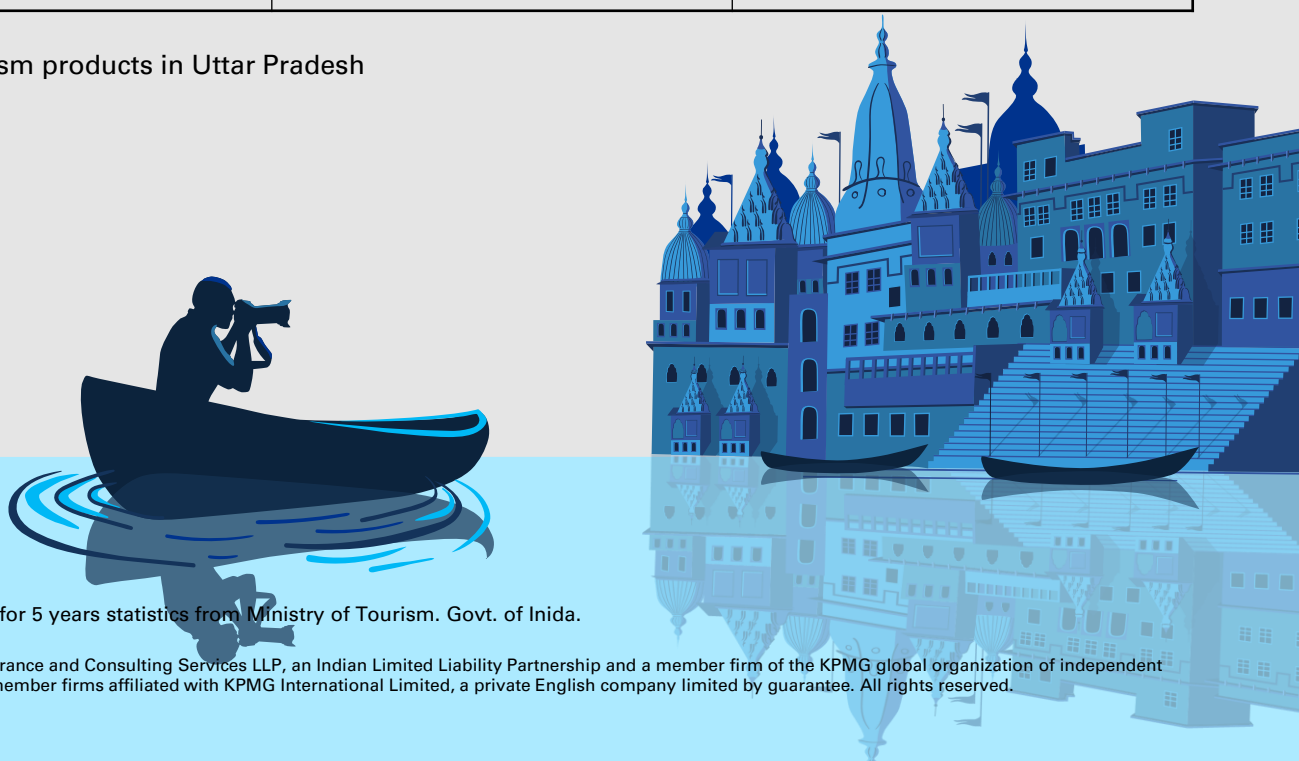
Focus : Uttar Pradesh

Uttar Pradesh

UP's tourism significantly contributes to the state's economic growth and employment generation, both direct and indirect, making it an important focus area for the government. It is one of the most preferred states for tourists in India, owing to a diverse set of tourism attractions. In terms of tourist footfalls, the state is consistently ranked among the top-five states¹⁴ in the country.

1. Adventure Tourism Project	12. Heritage hotel	23. Public museums
2. All-weather/ seasonal camps	13. Heritage homestays	24. Resorts
3. Budget hotel	14. Hotels	25. Revolving restaurants
4. Caravan Tourism units	15. New Tourism Startup units	26. Rural homestay
5. Caravan parking places	16. International Yoga Center/ Naturopathy Centres	27. Theme Park/ Amusement Park/ Water Park
6. Convention Centre for MICE activities	17. Light and sound show/ Laser shows	28. Tour and Travel operators working for international inbound tourist
7. Cultural centres	18. Mega projects	29. Tourism and Hospitality Training institutes
8. Cultural, rural village or tourist Village	19. Multi Level Parking	30. Waterbodies /Lake/River Cruise Tourism unit
9. Eco- Tourism resorts/ units	20. Permanent tented accommodation/swiss cottages	31. Wayside Amenities / Dhabas
10. Farm stay	21. Pilgrimage dormitories (Dharamshala's and ashrams)	32. Wellness centre
11. Flotels/ Floating Restaurants	22. Public Golf Course units- open and non-restricted	33. Wellness resorts/ unit

Range of tourism products in Uttar Pradesh



14. KPMG analysis for 5 years statistics from Ministry of Tourism. Govt. of India.

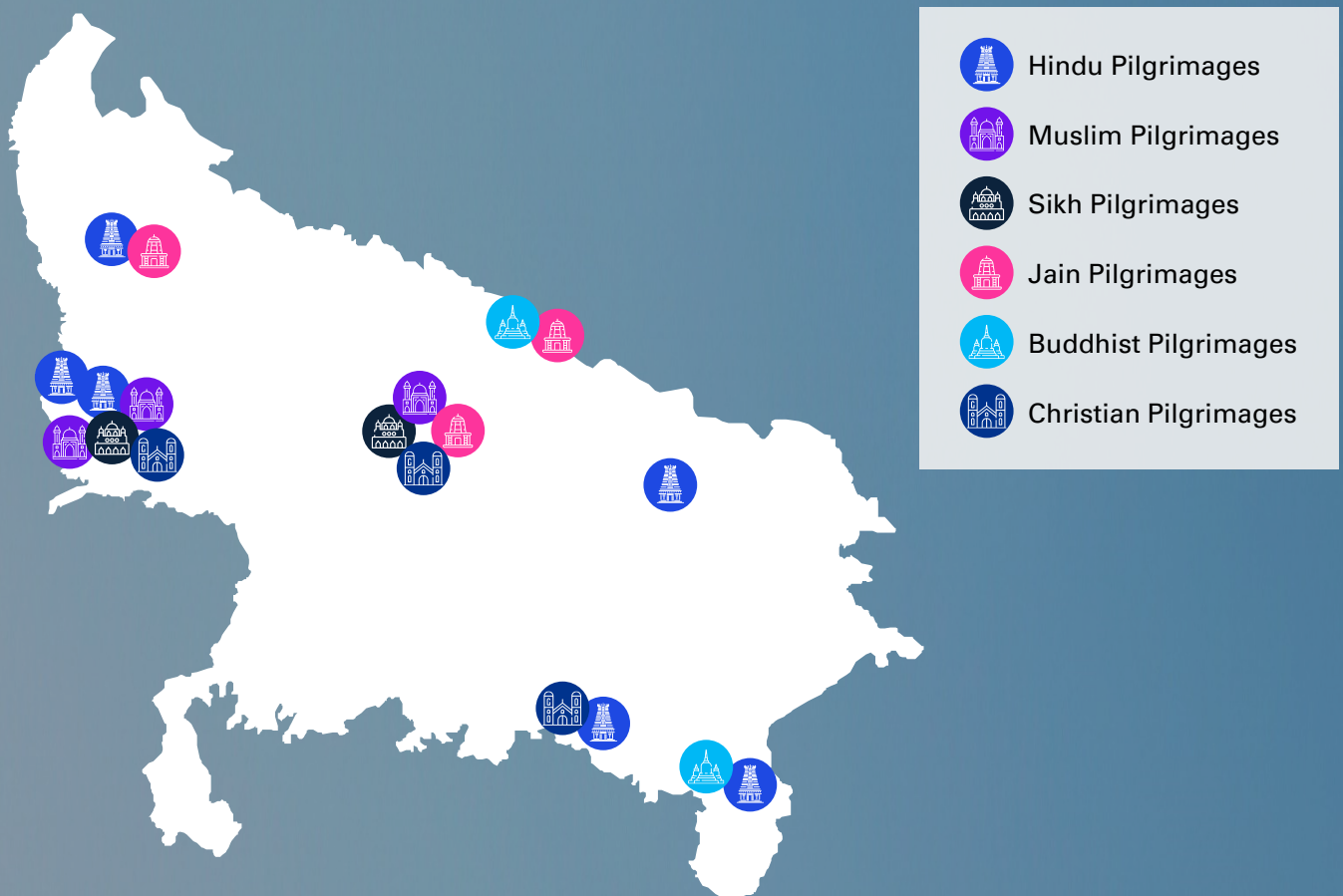
A popular land of architectural marvels and history, Uttar Pradesh is also replete with spirituality and divinity and is one of the preferred pilgrimage places for those seeking spiritual holidays in India. The state boasts of several religious places of different faiths that offer spiritual serenity in both popular as well as unexplored or less-explored tourist destinations in the state.

Popular religious sites of Uttar Pradesh have been listed below:

Religion	Pilgrimage sites
 Hindu	Vrindavan- Banke Bihari temple, Govind Ji Temple, Iskon Temple, Sri Radha Madan Mohan Temple, Shri Rangaji Temple. Mathura- Dwarkadeesh Temple, Gita Mandir, Kehsav Dev Temple, Shri Krishna Janmabhoomi Temple, Gokul- Shir Thakurani Ghat, Nand Bhawan, Raman Reti, Brahman Ghat, Gokulnathji temple. Govardhan- Daan Ghati Manrir, Govardhan Parikrama, Kusum Sarovar, Mansi Ganga Kund, Radha Kund. Chitrakoot- Bharat Koop, Bharat Milap Temple, Gupt Godavari, Janki kund, Sphatik Shila, Prayagraj- Triveni Sangam, Shankar Viman Mandapam, Mankameshwar Temple, Ayodhya, Varanasi.
 Muslim	Agra- Jama Masjid, Jawab Masjid. Lucknow- Jama Masjid, Dargah-E-Sabri, Dewa Sharif. Fatehpur Sikri- Jama Masjid, Tomb of Salim.
 Sikh	Gurudwara Guru ka Taal Agra, Gurudwara Yahiyaganj.
 Jain	Jain Temple Lucknow, Shri Digambar Jain Shrivasti Teerth Kshetra Shravasti, Digamber Jain Temple Meerut.
 Buddhist	Shravasti- Kachchi Juti, Pakki kuti, Ancient Sobhnath Temple. Sarnath- Dhamek Stupa, Chaukhandi Stupa, Mulagandha Kuti Vihar, Tibetan Temple, Thai Temple, Japanese Temple.
 Christian	St. George's Cathedral Agra. Lucknow- Lalbagh methodist Church, Christ Church, All Saits Garrison Church, St. Joseph's Cathedral Church, Assembly of Gods Church. Prayagraj- All Saints Cathedral. Meerut- John's Church

Source: www.tourmyindia.com

Figure 5: Location of pilgrimages in Uttar Pradesh



Source 8: uptourism.gov.in

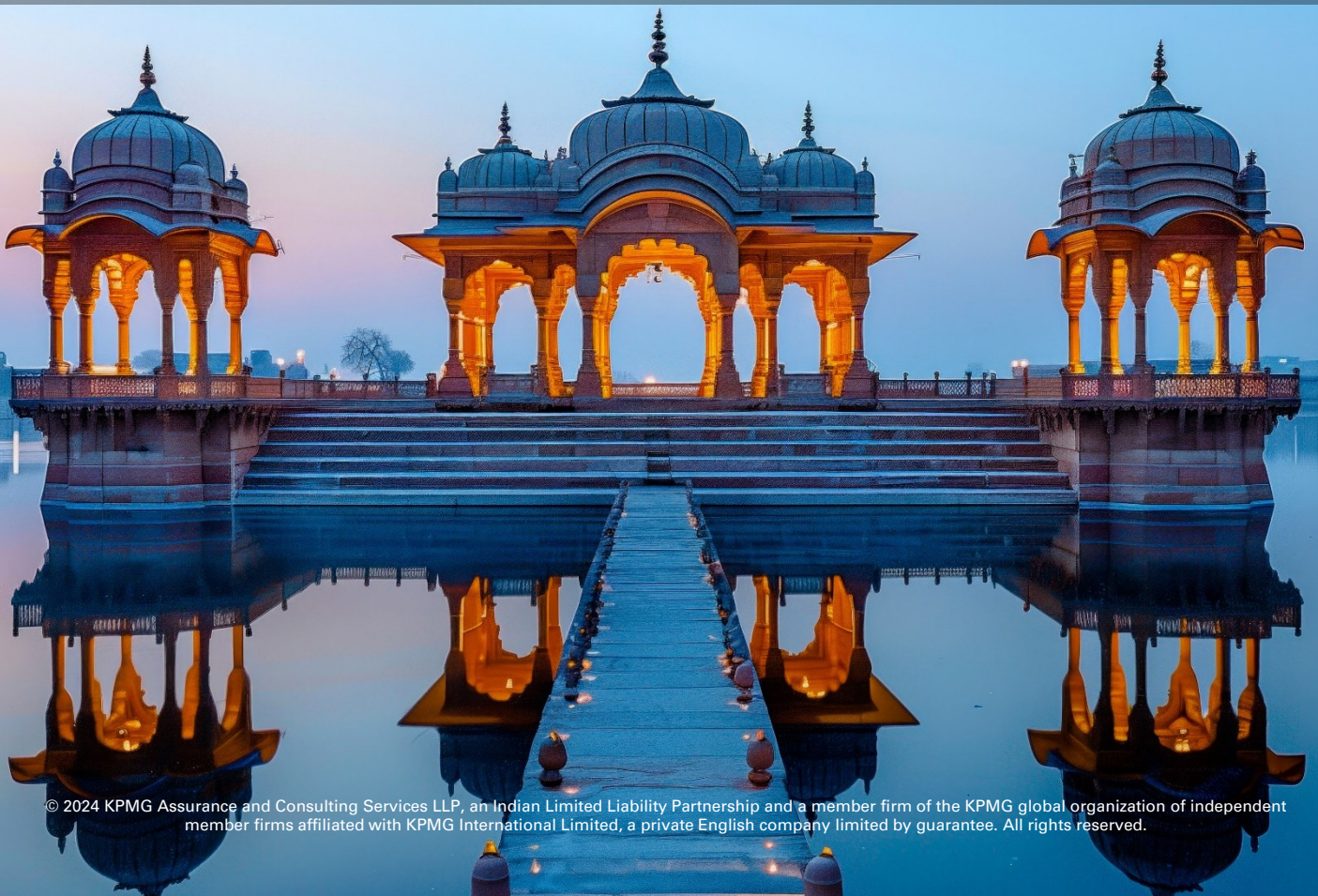
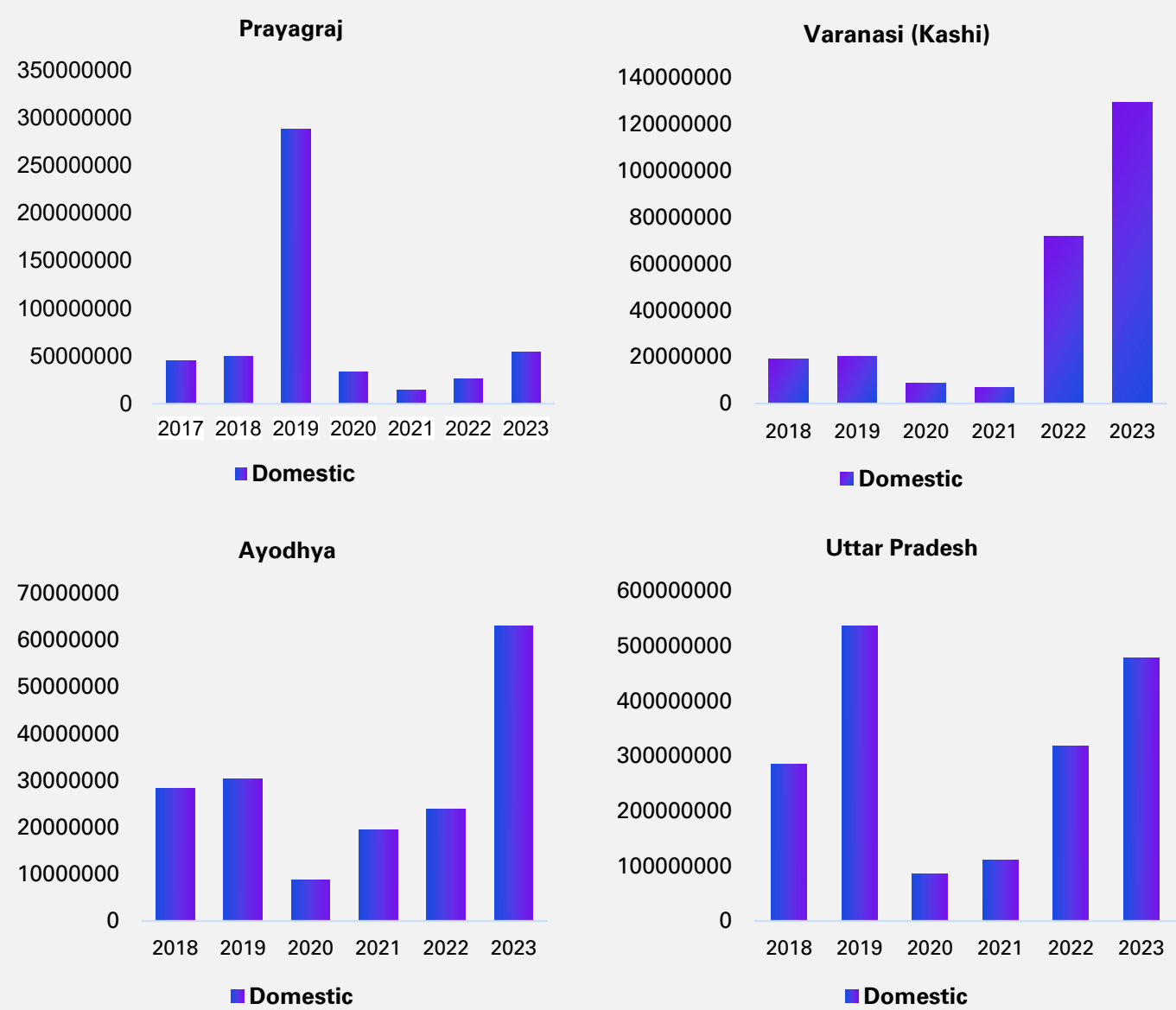


Figure 6: Domestic footfall in holy destinations of Uttar Pradesh



Source 9: uptourism.gov.in

Travelling for religious purpose has been dominant

The increased popularity of Uttar Pradesh’s temple towns has not only helped in boosting its regional economy, but also is acting as a catalyst for the state’s trillion-dollar economy target by 2027. The holy triangle (Varanasi- Prayagraj- Ayodhya) has immense potential to cater to spiritual tourism. After the redevelopment of the Kashi Corridor and construction of Ram Mandir in Ayodhya, these spiritual destinations are receiving higher footfall especially post covid.



Source 10: KPMG analysis on statistics by Uttar Pradesh Tourism

In 2023, Kashi alone saw over 10 crore tourists. Following the construction of the Ram Temple in Ayodhya after 500 years, tourist numbers have increased manifold, with an average of 1.5 lakh to 2 lakh tourists to Ayodhya daily.

Ayodhya

Ayodhya is believed to be the birthplace of Ram. The sensitivity attached to Ayodhya primarily revolves around its religious and cultural significance as bearing witness to the India's turbulent political and religious past. Today Ayodhya stands not only as a pilgrimage site but as a testament to the enduring spirit of faith.

Ayodhya as a tourist destination received major surge in footfall over the last five-years due to the construction of the new Ram Mandir. From 2 lakh visitors in 2017 to over 2 crores in 2023 consisting of 6.3 per cent of total visitors travelling to Uttar Pradesh.¹⁵ A new Ayodhya was conceptualised under the head of Navya Ayodhya, government organised 'Deepostava', which restored its global identity and earned a Guinness record for the state. Working closely with religious bodies, local administration, government agencies and private sector entities to coordinate efforts and investment, the potential of the site was recognised and turned into a global attraction with strategic development.

Creating heritage walks and trails that connect

significant historical and religious sites in Ayodhya to promote cultural awareness and tourism provides visitors with a holistic experience.

Ayodhya as a destination caters to the new approach of spiritual-travel catering to all segments of pilgrims. Popularly known for Diwali celebration, Ayodhya holds various other festival events like Ram Navmi, Ramleela, etc., which cater to the traditional pilgrims' segment. The hospitality sector recognises the new segments of pilgrims and cater to provide an experience through themed-based hotels, homestays, and wellness-centres.

At present a few hundred hotels, lodges, and homestays cater to the needs of the visiting devotees. Construction of 142 hotels, including a few luxurious properties. In the 2023, , 102 investment intents worth approximately INR18,000 crore were signed for tourism in Ayodhya.¹⁶

Such development has triggered the trend in reverse migration, where natives of Ayodhya are returning to their hometown to start new ventures in leu of increased influx of visitors.



15. Times of India, Jan 9, 2024

16. www.thehindu.com March 18, 2024

Kashi Vishwanath Corridor

The Kashi Vishwanath Corridor holds immense significance as a project aimed at enhancing accessibility and amenities around the Kashi Vishwanath Temple in Varanasi. It involves creating a pathway that connects the temple directly to the Ganga ghats, facilitating easier access for pilgrims. This corridor is also envisioned to beautify surroundings, preserve heritage sites, and accommodate a large number of devotees.

The carrying-capacity was the main challenge of the site that was addressed. The temple complex could

now accommodate up to 50,000 to 75,000 devotees owing its expansion from 3,000 sq. Ft. To 5 lakh sq. Ft. The temple corridor witnessed around 1.5 to 2 lakh visitors daily, with the number spiking to nearly 5 lakhs on festivals and Mondays, especially during the Shravan month.¹⁷

The redevelopment of Kashi Vishwanath Dham project saw the demolition of 314 buildings, which housed at least 1,400 shops besides illegal squatters. As the demolition progressed, a total of 78 existing temples were discovered and restored¹⁸.



Figure 7 Drone Image (Before corridor Development)

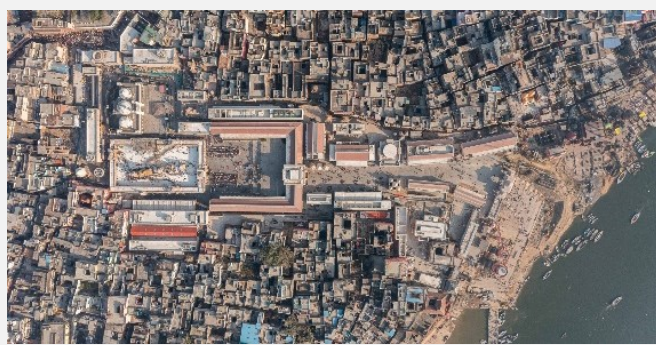
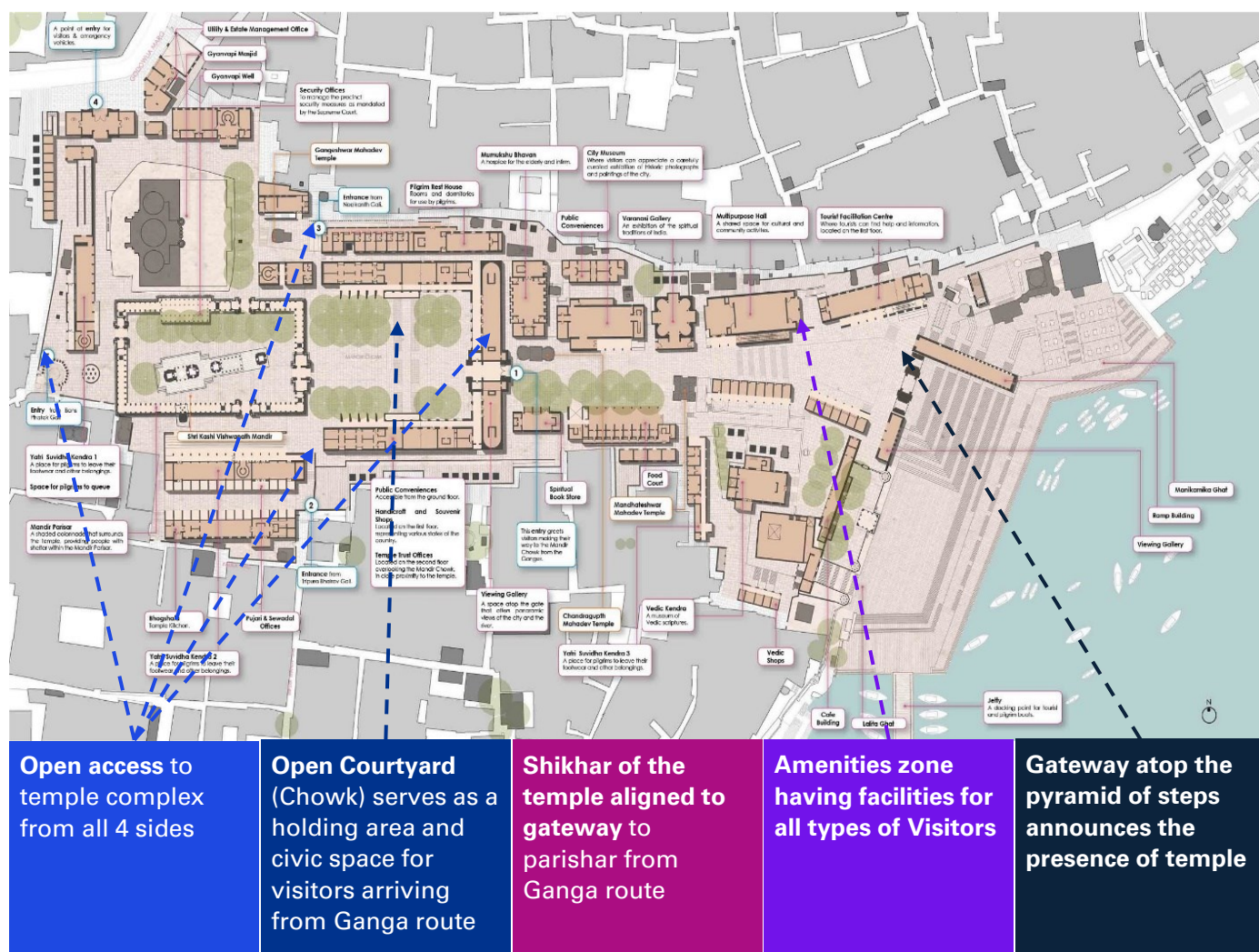


Figure 8: drone Image (After Corridor Development)



17. The Print, 30 July 2023

18. Hcp.co.in



Source 11: HCP Design, planning and management Pvt. Ltd.

With the development of the Kashi Corridor, Varanasi as a destination has seen an increase in footfall, contributing to boosting the local economy. In 2022, Varanasi had 82 million visitors, which is almost four times the number of visitors in 2019. The number accounted for almost 26 per cent fall arrivals in 2022, compared to less than 4 per cent in 2019¹⁹. Varanasi's tourist footfall surpassed Agra, which is home to the Taj Mahal, and made it the most visited city in Uttar Pradesh.²⁰ The expansion of the temple and the ease of darshan have further boosted tourism in Kashi.

19. India Today, Aug 11, 2024

20. invest.up.gov.in

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Tourism in its various forms like Heritage, Medical, Golf, MICE, Film, Religious, Border, Rural, Sustainable, plays a critical role in the growth of the tourism industry. Our main focus has been to join efforts with the tourism stakeholders for developing an integrated approach and promote the tourism industry.



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