

Hospitality Industry in India: Opening the door of new opportunities

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Introduction

Tourism represents relaxation and fun, a trip during the holiday weeks away from work but at the same time, for others, tourism is a source of employment; it is a business that brings revenue to millions of people around the world; it is a source of living. Thus tourism is “a social, cultural and economic phenomenon, which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes” (UNWTO). Tourism has emerged as a major economic sector and source of social and environmental change since the 1950s. It has also become a field of serious research and scholarship in many academic disciplines since 1970s.

The hospitality industry is “the very essence of tourism, involving the consumption of food, drink and accommodation in an environment away from the normal home base. Hospitality as a subsection of tourism “is a fundamental part of the domestic and inbound leisure market. Consistent demand for tourism allows the hospitality industry to forecast demand and identify opportunities to increase consumer spend, creating a wave of secondary financial impacts” (Robinson, Lück and Smith, 2013). The hospitality industry has 2 sectors: the accommodation sector and the Food and Beverage (F&B) sector. It has grown for the last 26 years and, despite the recession is determined to grow further. The sector at present employs about 2.5 million people and provides support to other industries, like hotels and restaurants to educational establishments. The Indian tourism and hospitality industry has materialized as one of the key drivers of growth among the services sectors in India. It contributes to 6.23 percent to the National GDP and 8.78 percent of the total employment in the country. Constant transformation, functional growth and improving standards have gained the hospitality industry of India approval all over the world. The industry is broadly divided in two segments¹.

Tourism in India has generated immense employment opportunities and is a vital source of foreign exchange for the country. The travel and tourism industry contributed Rs 2.21 trillion (US\$ 36.21 billion) or 2.3 per cent to the country's gross domestic product (GDP) in 2013. The figures are expected to rise to Rs 4.44 trillion (US\$ 72.19 billion) by 2024. The revenue from domestic tourism is likely to grow by 8.24 per cent in 2014 as compared to 5.18 per cent a year ago, according to the World Travel and Tourism Council (WTTC). The Indian hospitality sector has been growing at a cumulative annual growth rate of 14.12 per cent every year adding significant amount of foreign exchange to the economy. The Travel and Tourism Competitiveness Report of 2013, published by World Economic Forum, India, stated that the ranking of India is 11th in the Asia Pacific region and 65th in the World Travel and Tourism Competitiveness Index 2013. As per the Planning Commission, the sector creates more jobs per million

rupees of investment than any other sector of the economy. It is capable of providing employment to a wide spectrum of job seekers, from the unskilled to the specialized, even in the remote parts of the country. The sector's employment-generation potential has also been highlighted by the World Travel & Tourism Council (WTTC), which says India's travel and tourism sector is expected to be the second-largest employer in the world, employing approximately 52 lac people, directly or indirectly by 2019.

Review of literature

Rao (2014) highlighted in his study, that destinations seeking to maintain or strengthen their position in the future world of Hospitality and tourism industry. It required a long-term action plan comprising a set of strategies that comply in the future needs of the tourism people.

Sharma and Kalotra (2016) concluded that hospitality industry has generated tremendous employment opportunities and is a big source of foreign exchange for India. The hospitality sector is responsible for more jobs per million rupee of investment than any other sector. This sector provided varieties of jobs which satisfies unskilled people to specialized one.

Mishra and Rao (2014) found in their study that, tourism and hospitality industry is the largest service industry globally in terms of gross revenue and foreign exchange earnings. It is also one of the largest employment generators in the world the driving forces of this industry lie in the recreational, knowledge seeking, religious and business interests of people around the world the human urge for new experience, adventure, and entertainment plays the role of a catalyst for the growth of this industry. it also has the potential to stimulate other sectors in the economy owing to the cross - synergistic benefits and its backward and forward linkages which makes tourism and hospitality both a cause and consequence of economic development.

Praveen Sethi (1999) in his book "Nature and scope of Tourism" opines that "earnings from international tourism represent an invisible export; they are the result of selling the country's tourism product to tourists from abroad. Expenditure on tourism are the opposite. They represent an invisible import; one's residents are buying a tourism product elsewhere'.

OBJECTIVES

1. To study the Hospitality industry India.
2. To identify the government initiatives and new opportunities in hospitality industry in India.

Research Methodology

Current study is focused on to understand and identify new opportunities in hospitality Industry. The information received from different official departments is used in the study. Thus to achieve desired objective we have collected data from the secondary data.

Indian Hospitality Industry

India is a large market for travel and tourism. It offers a diverse portfolio of niche tourism products - cruises, adventure, medical, wellness, sports, MICE, eco-tourism, film, rural and religious tourism. India has been recognized as a destination for spiritual tourism for domestic and international tourists.

Total contribution by travel and tourism sector to India's GDP is expected to increase from US\$ 136.3 billion in 2015 to US\$ 275.2 billion in 2025. Travel and tourism is the third largest foreign exchange earner for India. In 2014, the country managed foreign exchange earnings of USD 19.7 billion from tourism.

Foreign tourists arriving in India (million)



Source: World Travel & Tourism Council's Economic Impact 2015, Ministry of Tourism, TechSci Research * Till November 2015 CAGR- Compound annual growth rate

The launch of several branding and marketing initiatives by the Government of India such as “Incredible India!” and “Athiti Devo Bhava” have provided a focused impetus to growth. The Indian government has also released a fresh category of visa - the medical visa or M visa, to encourage medical tourism in the country. India is expected to receive nearly half a million medical tourists by 2015, implying an annual growth of 30 per cent. In November 2014, Government of India launched Tourist Visa on Arrival (TVoA) which is enabled by Electronic Travel Authorization (ETA), known as the e-Tourist Visa scheme for 43 countries. The facility is likely to enable 7.5 percent growth in the tourism sector in 2015.

The Government has also been making serious efforts to boost investments in tourism sector. In the hotel and tourism sector, 100 per cent FDI is allowed through the automatic route. A five-year tax holiday has been offered for 2, 3 and 4 star category hotels located around UNESCO World Heritage sites (except Delhi and Mumbai). The investment in tourism sector is expected to be US\$ 12.4 billion in the 12th Five Year Plan; of these, private investments are likely to total US\$ 9.2 billion

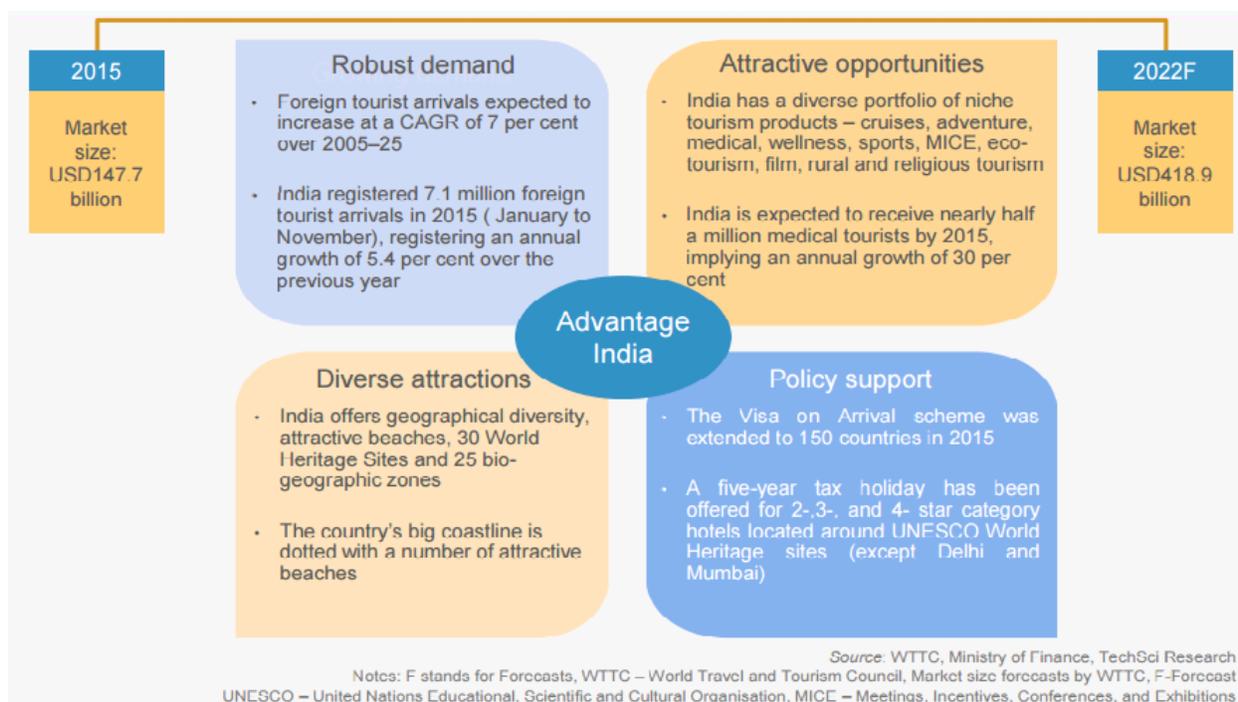
Investments

The tourism and hospitality sector is among the top 10 sectors in India to attract the highest Foreign Direct Investment (FDI). During the period April 2000-March 2016, the hotel and tourism sector attracted around US\$ 9.23 billion of FDI, according to the data released by Department of Industrial Policy and Promotion (DIPP)³.

With the rise in the number of global tourists and realising India's potential, many companies have invested in the tourism and hospitality sector. Some of the recent investments in this sector are as follows:

- The first Incredible India Tourism Investment Summit 2016, which was organised from September 21-23, 2016, witnessed signing of 86 Memoranda of Understanding (MoUs) worth

around Rs 15,000 crore (US\$ 2.24 billion), for the development of tourism and hospitality projects.



- The Ministry of Tourism has approved projects worth Rs 450 crore (US\$ 67.10 million) under the Swadesh Darshan scheme, for the improvement and creation of tourism infrastructure in Madhya Pradesh, Uttarakhand, Tamil Nadu, Uttar Pradesh and Sikkim.
- AccorHotels, Australia's largest hotel operator has entered into an agreement with the Australia India Travel & Tourism Council (AITTC) with a view to strengthen and promote tourism between Australia and India.
- Global hospitality major Carlson Rezidor Hotel Group, which is also the largest foreign hotel brand in India by number of hotels, plans to increase its total count to 120 hotels in India by 2020.
- Marriott International Inc, the US-based hotel chain, is now looking for expanding its operations in North India, including prominent cities in Uttar Pradesh like Kanpur, Varanasi and Agra.
- Steigenberger Hotels, a German luxury hotel company, and MBD Group, a Delhi-based firm which runs 5-star Radisson Hotels in Noida and Ludhiana, have formed a joint venture to build five luxury hotels and manage another 15 luxury hotels in India by 2030.
- Keys Hotels, a premium brand of Berggruen Hotels, plans to launch three new hotels in India at Vishakhapatnam, Calicut and Jaipur, and further add up to 10 Keys Hotels in the country by the end of FY 2017.

- Stayzilla, a budget hotels and homestays aggregator, has raised over US\$ 13 million in Series C round of funding from Matrix Partners and Nexus Ventures, which will be used to improve product, technology and marketing initiatives for its alternate stay business.
- Travel Tripper, a US-based hotel technology firm, has entered the Indian market by setting up its second global delivery centre outside the US in Hyderabad, which will serve as a development and client service centre for the company's worldwide operations.
- Indian Railway Catering and Tourism Corporation (IRCTC) has partnered with OYO Rooms, India's largest branded network of hotels, to provide standardised accommodation options to train travellers through its convenient booking platform.
- Ctrip.com, China's largest travel portal, has bought a stake in India's largest travel portal MakeMyTrip for US\$ 180 million via convertible bonds, which allows Ctrip to increase its share in MakeMyTrip up to 26.6 per cent.
- Global investment banking major Goldman Sachs has invested Rs 441 crore (US\$ 65.76 million) to acquire an equity stake in Gurgaon-based hotel development and investment start-up SAMHI Hotels which will help fund SAMHI's expansion plans.
- Thai firm Onyx Hospitality and Kingsbridge India hotel asset management firm have set up a joint venture (JV) to open seven hotels in the country by 2018 for which the JV will raise US\$ 100 million.
- Goldman Sachs, New-York based multinational investment banking fund, has invested Rs 255 crore (US\$ 38.02 million) in Vatika Hotels³.

Government Initiatives

The Indian government has realised the country's potential in the tourism industry and has taken several steps to make India a global tourism hub. Some of the major initiatives taken by the Government of India to give a boost to the tourism and hospitality sector of India are as follows²:

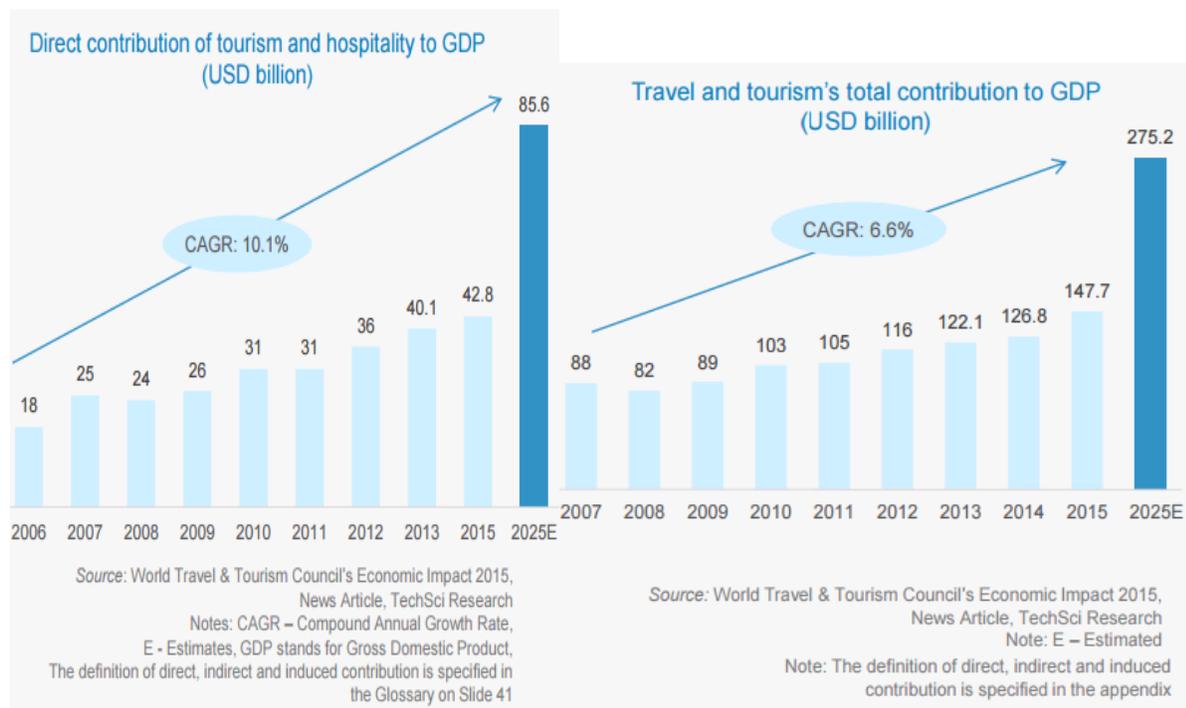
- The Union Cabinet has approved a MoU between India and South Africa, aimed at expanding bilateral cooperation in the tourism sector through exchange of information and data, establishing exchange programmes and increasing investments in the tourism and hospitality sector.
- The Ministry of Tourism plans to revise its guidelines to exempt homestays from service tax or commercial levies and make their licensing process online, which is expected to encourage people to offer homestays to tourists.
- The Union Cabinet has approved the signing of Memorandum of Understanding between the Ministry of Tourism of India and the Ministry of Trade Industry and Tourism of Colombia in order to boost cooperation in the field of tourism between the two countries.
- The Central Government has given its approval for signing of a MoU between India and Cambodia for cooperation in the field of tourism with a view to promote bilateral tourism between the two countries.

- The Heritage City Development and Augmentation Yojana (HRIDAY) action plans for eight missions cities including Varanasi, Mathura, Ajmer, Dwaraka, Badami, Vellankini, Warangal and Amaravati have been approved by HRIDAY National Empowered Committee for a total cost of Rs 431 crore (US\$ 64.27 million).
- Government of India plans to cover 150 countries under e-visa scheme by the end of the year besides opening an airport in the NCR region in order to ease the pressure on Delhi airport.
- Under 'Project Mausam' the Government of India has proposed to establish cross cultural linkages and to revive historic maritime cultural and economic ties with 39 Indian Ocean countries.
- Swadesh Darshan (Integrated Development of Tourist Circuits on Specific Themes) scheme was launched by the Ministry of Tourism on March 9, 2015 for the development of theme based tourist circuits to cater to both mass and niche tourism. Thirteen theme tourist circuits, viz North-East India Circuit, Buddhist Circuit, Himalayan Circuit, Coastal Circuit, Krishna Circuit, Desert Circuit, Tribal Circuit, Eco Circuit, Wildlife Circuit, Rural Circuit, Spiritual Circuit, Ramayana Circuit and Heritage Circuit (launched in the month of December 2015) have been identified for development under this Scheme. Under Swadesh Darshan scheme that aims to develop world class infrastructure to promote cultural and heritage value of the country and enhance the tourist attractiveness, 27 projects for Rs. 2261.50 crore have been sanctioned for 21 States and Union Territories since its launch in January 2015. They include EcoTourism Circuit in the states of Uttarkhand, Telangana and Kerala, Tribal Circuit in Nagaland, Chattisgarh and Telangana, Coastal Circuit in Andhra Pradesh, Odisha, Pudicherry, West Bengal, Maharashtra and Goa, Buddhist Circuit in Bihar and Madhya Pradesh, Himalayan Circuit in Jammu and Kashmir, Desert Circuit in Rajasthan, Wild Life Circuit in Madhya Pradesh & Assam and North East India Circuit in Arunachal, Sikkim, Manipur, Mizoram, Meghalaya and Tripura under Swadesh Darshan. 16 A Project for Integrated Development of Eco-Tourism, Adventure Sports, and Associated Tourism related Infrastructure for Development of Tehri Lake and surroundings as New Destination-District Tehri has been sanctioned for an amount of Rs.80.37 crores under the Swadesh Darshan scheme⁴.
- PRASAD, The National Mission for Pilgrimage Rejuvenation and Spiritual Augmentation Drive (PRASAD) scheme, was launched by Ministry of Tourism on March 9, 2015 for the development and beautification of pilgrimage sites to tap the growth of domestic tourists driven by spiritual/religious sentiments. The scheme seeks to augment tourism infrastructure at places of pilgrimage to provide better facilities to pilgrims/tourists and enhance their experience. In the first phase, 13 cities, viz, Amritsar, Kedarnath, Ajmer, Mathura, Varanasi, Gaya, Puri, Dwarka, Amravati, Kanchipuram, Vellankanni, Guwahati and Patna have been identified for infrastructure development under PRASAD. 16. Ministry of Tourism: Press Information Bureau:-27th July 2016 <http://pib.nic.in/newsite/PrintRelease.aspx?relid=147816> 17. Ministry of Tourism- Annual Report 2015-16 18. Ministry of Tourism: Press Information Bureau:-27th July 2016 <http://pib.nic.in/newsite/PrintRelease.aspx?relid=147816> During 2014-16, Ministry of Tourism has sanctioned 11 projects for Rs.284.53 crores under PRASAD. 11 projects, in Amravati, Kamakhya Temple, Patna Sahib, Patna, Vishnupad Gaya, Shri JagannathPuri, Amritsar, Ajmer-

Pushkar, Varanasi, Mathura-Vrindavan, and KedarnathDhamUttarakhand have been sanctioned under this scheme. These include 2 Projects worth Rs.36.96 crores approved for Varanasi River Cruise and Dwarka.²

RISING CONTRIBUTION TO INDIA’S GDP

- Tourism in India accounts for 7.5 per cent of the GDP and is the third largest foreign exchange earner for the country
- The tourism and hospitality sector’s direct contribution to GDP is USD42.8 billion in 2015 Over 2006–15, direct contribution is expected to register a CAGR of 10.1 per cent
- The direct contribution of travel and tourism to GDP is expected to grow 7.2 per cent per annum from 2015 – 25 to USD85.6 billion.
- The sector’s total contribution to GDP is expected to (USD billion) increase to USD147.7 billion by the end of 2015 from USD88 billion in 2007 and is expected to reach USD275.2 billion in 2025E
- It is forecasted to increase by 6.5 per cent per annum to USD275.2 billion by 2025 (7.6 per cent of GDP)⁴



OPPORTUNITIES

Medical tourism

Medical & Wellness Tourism Several steps have been taken to promote India as a Medical and Wellness tourism destination. The number of medical visas issued in 2015 increased by 77% compared to 2014. Between January-June 2016, 96,856 Medical Visas were issued highlighting the continued growth in this

space.²¹ In an effort to further promote the medical and wellness sector in India, in June 2016, the list of permissible activities under e-Tourist visa was expanded to include “Attending a Short Term Yoga Program” and “Short Duration Medical Treatment under Indian Systems of Medicine.” For promoting quality in the healthcare sector, National Accreditation Board for Hospitals and Healthcare Providers (NABH), provides accreditation to hospitals and wellness centres for adhering to quality standards. A National Medical & Wellness Tourism Board, was constituted on October 5, 2015 to help foreign tourists get better access to Indian healthcare.²² The Board works as an umbrella organization that governs and promotes this segment of tourism in an organized manner. It is chaired by the Minister of Tourism and has senior representatives from the Tourism ministry, Department of AYUSH, Quality Council of India, NABH and private sector.²³ During the year 2015-16 (till December 2015), the Ministry of Tourism under Market Development Assistance scheme, provided financial assistance to Medical Tourism Service Providers⁵.

Cruise tourism

A Task Force on Cruise Tourism with Secretary (Tourism) as the Chairman and Secretary (Shipping) as the Co-Chairman was constituted on November 24, 2015, to develop the vast coastline of the country and promote Cruise Tourism. Amongst its members are representatives from CBEC, Bureau of Immigration, Central Industrial Security Force, Ministry of Home, Department of Revenue, Inland Waterway Authority of India, Chairman, Cochin Port Trust, Secretaries of Tourism of few states and representatives of cruise shipping industry. The task force aims to streamline processes, benchmark pricing of ports to be globally competitive, suggest incentives and subsidies, create port infrastructure and actively pursue operators to set up operations in India⁵.

Adventure Tourism

During the Year 2015-16 (up to 31st December 2015), the Ministry of Tourism has released an amount of Rs. 64.59 lakh, to Indian Institute of Skiing & Mountaineering (IIS&M) for activities related to Adventure tourism. • Indian Mountaineering Foundation (IMF): An amount of Rs. 47.06 lakh, has been released to IMF on account of peak fee concession given to mountaineers going on expeditions⁵.

Rural tourism

Rural Tourism Development of Rural Tourism has been a focus area under Ministry of Tourism. The Rural Tourism Circuit has been identified as one of the thirteen thematic circuits for development under the Swadesh Darshan scheme. The Ministry of Tourism has a Rural Tourism Scheme, which is a part of Product/Infrastructure Development for Destinations and Circuits (PIDDC) Scheme. The main objective of the scheme is to showcase rural life, art, culture and heritage in villages, which have core competence in art & craft, handloom, textiles, natural environment etc. Under the scheme, Central Financial Assistance (CFA) is provided for infrastructure development and capacity building to State Governments/Union Territory Administrations for each identified site by them. An amount of Rs.20.00 crores has been allocated under U.T. Plan for the PIDDC during 2015-16⁵.

Agricultural Tourism

Agricultural tourism is an instrument for economic development and employment invention above all in the remote and backward areas. Agricultural tourism helps to engender additional revenues and makes for

the profitable diversity in the rural areas of the country. Agricultural tourism allows the guests to be attached to the nature as well as to feel cultural and traditional aspects of the state, such as the local natural features, food, handicraft, etc. Agricultural tourism allows the visitors to reside in farms which are in the form of stud farms, dairy farms or agricultural farms. This kind of tourism is a perfect fit for urbanites who want to spend some time away from their busy calendar and get back to natural world. The Indian government has come in touch with the United Nations Development Program⁵.

Women only floors

Women might have fought long and tough for sameness, but now hotels are presenting floors entirely for female guests, which is the best innovative idea in the hospitality industry. This is developed to provide additional security, hygiene and extra amenities customized to women. The women only floors ensure that the women travellers experience secured and get pleasure from the hospitality and amenities without any apprehension. Many global chains have clinged various amenities such as special hair dryers and toiletries and control women-only lounges on the dedicated floor. The Naumi Hotel in Singapore, the leading Hotel of New York town, and the hotel of Crowne Plaza properties of Washington, D.C. Are among the hotels that feature floors stringently for female visitors⁵.

MICE Tourism

The Indian hospitality industry is experiencing innovative concept of MICE i.e. Meeting, Incentive, Conferences and Exhibitions. It is a type of tourism in which planning is done in advance for a particular purpose either for profession or for entertainment. MICE are one of the countless ways through which India can attract international tourists. There exists a dynamic business opportunity as a splendid venue for international conferences and conventions of no less than global standards as India offers cultural and heritage sites, the imperial and spiritual, excellent services of beach and adventure holidays which can be combined as pre and post conference tours. Another aspect of MICE is the incentive tourism. It is managed for the employees by the companies to offer them as a reward reward their performance. In the Indian framework, incentives is at present the largest part of MICE but in a growing market, it's only a matter of time before the entire gamut of MICE activities are undertaken by the Indian corporate world. Currently India holds 27th position in the global MICE market. India has an Infrastructure that provides notable grouping of somewhere to stay and other conference support facilities to hold a successful Conference. A few examples of the same are VigyanBhawan here in New Delhi, Centre Point, Renaissance Hotel and gathering Centre in Mumbai, the BM Birla Science and Technology Centre in Jaipur, the Jaypee Hotels & International meeting Centre, Agra and the Cochin meeting Centre, etc together with facilities in the business hotels and resorts at various centres in the country. India is going the global way and MICE is fast becoming a major part of its travel and promotional budgets⁵.

Institutes of Hotel Management

A total of 42 Institutes of Hotel Management (IHMs), comprising 21 Central IHMs and 21 State IHMs, and 9 Food Craft Institutes (FCIs), have come up with the support of the Ministry of Tourism. These institutes are set up as autonomous societies with specific mandate to impart hospitality education/ conduct training in hospitality skills.²⁸ – During the year 2015-16, in-principle approval has been accorded for the setting up of three new State Institutes of Hotel Management (SIHMs) i.e., one each at

Ramnagar (Uttarakhand), Jhalawar (Rajasthan) and SawaiMadhopur(Rajasthan) with the Central Financial Assistance of Rs. 16.5 crores.²⁹ – The Ministry of Tourism till August 2016, has sanctioned 12 Institutes of Hospitality Management in the North Eastern States.³⁰ (Further details in Annexure III). Out of these Central Institute of Hotel Management, Guwahati, Central Institute of Hotel Management, Shillong, State Institute of Hotel Management, Gangtok and Food Craft Institute, Nawgaon are operational. • Food Craft Institutes (FCI): Ministry has accorded approval for setting up of Food Craft Institute at Khajuraho in Madhya Pradesh, and has sanctioned Central Financial Assistance of Rs.475.00 lakhs. During the year 2015-16, in-principle approval has also been accorded for setting up of two Food Craft Institutes (FCI) at Dholpur and Baran (Rajasthan) with the Central Financial Assistance of Rs. 7.50 crores.

Indian Culinary Institute at Tirupati and its Centre at Noida: An Indian Culinary Institute has been set up at Tirupati and the first academic session commenced in September with a 3-year BSc course in Culinary Arts and will offer 30 seats for the first academic batch of 2016-2019. The ICIs will be Centres of Excellence, which will offer structured, regular programs of study specific to culinary arts and culinary management leading to graduate and post graduate level degrees, promote research and innovation, organize demand driven certificate and diploma courses, document and create database specific to Indian cuisine and commission studies and surveys on cuisine⁵.

Road Ahead

India's travel and tourism industry has huge growth potential. The tourism industry is also looking forward to the expansion of E-visa scheme which is expected to double the tourist inflow to India. Rating agency ICRA Ltd estimates the revenue growth of Indian hotel industry strengthening to 9-11 per cent in 2015-16. India is projected to be the fastest growing nation in the wellness tourism sector in the next five years, clocking over 20 per cent gains annually through 2017, according to a study conducted by SRI International.

CONCLUSION

To maintain and strengthen the position in the future world of Hospitality and tourism industry, we should start working on a long-term action plan comprising a set of strategies that comply in the future needs of the tourism people. The above study deserves a deep reflection as it might spark other ideas and create interesting debates. Despite the size and complexity of the industry, today many of its arms are interconnected by technology. Although many in the industry work in behind-the-scenes positions, those on the front lines-travel agents, front desk clerks, tour guides, and so on-must be enthusiastic and articulate. And in most any position, you'll need to have a love of service and a strong attention to detail. The Ministry of Tourism has been making efforts to develop quality tourism infrastructure at tourist destinations and circuits in the country. It has started projects related to Product/Infrastructure Development for Destination and Circuits (PIDDC), Human Resource Development, Fairs and Festivals, and Adventure and Rural Tourism for infrastructure augmentation.

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