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# GROWTH AND DEVELOPMENT OF INDIAN TOURISM INDUSTRY

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**Dr. Mandeep Kaur**

Associate Professor,  
Dept. of Commerce and Business Management,  
Guru Nanak Dev University, Amritsar, Punjab  
mkaur02@yahoo.co.in

**Nitasha Sharma,**

Senior Research Fellow,  
bhardwajicks@yahoo.com

## ABSTRACT

*The importance of tourism to economic development has been recognized widely due to its contribution to the balance of payments, GDP and employment. Since last few years, Indian tourism industry has been growing at a rapid pace and it has vast potential for generating employment and earning large amount of foreign exchange. So it is imperative to study the growth and development of Indian tourism industry. In the present paper the growth and development of Indian tourism industry has been studied. For this purpose, data has been collected from secondary sources such as Bureau of Immigration, Ministry of Tourism, Govt. of India and World Travel and Tourism Council. To analyze the collected data, Compound Annual Growth Rate (CAGR) has been calculated. Results showed that tourism is the largest service industry in India, with a contribution of US\$34.008 billion to the national GDP and 7.4 percent to the total employment in the year 2011. India witnessed more than 5 million annual foreign tourist arrivals and more than 740 million domestic tourist visits in the year 2011. Moreover, it is suggested that the central and state government should take initiatives to develop tourism in India.*

**Keywords:** Growth, Development, India, Tourism Industry

## Introduction

One of the chief reasons that government supports and promotes tourism throughout the world is that it has a positive impact upon economic growth and development (Ivanov and Webster, 2006). The growth of tourism in broad term refers to the gradual evolution of tourism which is considered to be a factor of the productivity for a country's economy (Dritsakis, 2004).

The first conscious and organized effort to promote tourism in India was made in 1945 when a committee was set up by the government of India under the chairmanship of Sir John Sergeant, educational adviser to the government of India (Krishna, 1993). Thereafter, the development of tourism was taken up in a planned manner in 1956 coinciding with the second five year plan. The sixth plan marked the beginning of a new era when tourism began to be considered as a major instrument for social integration and economic development ([www.incredibleindia.com](http://www.incredibleindia.com)).

A national policy on tourism was announced in 1982. Later on in 1988, the national committee on tourism formulated a comprehensive plan for achieving sustainable growth in tourism ([www.ibef.org](http://www.ibef.org)). In 1992, a national action plan was prepared and in 1996 the national strategy for promotion of tourism and in 1997, a new tourism policy was drafted. The policy has recognized the roles of central and state governments, public sector undertakings and the private sectors in the development of tourism (<http://en.wikipedia.org/wiki/Tourism>).

Tourism activities are considered to be one of the major sources of economic growth. It can be regarded as a mechanism of generating the employment as well as income in both formal and informal sectors (Khalil, 2007). Travel and tourism is the world's largest industry and jobs creator across national and regional economies (Aliquah, 2010). The speedy growth of tourism causes an increase of household incomes and government revenues through multiplier effects, improvements in the balance of payments, and growth of the tourism industry (Kareishan, 2010).

Travel and tourism has not only become one of the world's largest industry but also grows consistently every year (Gupta and Gupta, 2007). The international tourist arrivals have shown an uninterrupted growth of 683.3 million in the year 2000 to 940 million in the year 2010. The international tourism receipts have increased from US\$ 475.3 million in the year 1990 to US\$ 919.0 million in the year 2010. Tourism industry is contributing 6.23 percent in the GDP of the country (WTO, 2010).

India was ranked eleventh in the Asia Pacific region regarding international tourist arrivals and 40th overall in the year 2010 (WTO, 2010). Indian tourism industry is expected to be the second largest employer in the world by 2019 (WTTC, 2009). Indian tourism industry is growing and it has vast potential for generating employment and earning large amount of foreign exchange.

## **Conceptual Background**

The tourism and its effect on the economic activities had been discussed by various researchers worldwide.

Bahamni-oskooee and Alse (1993) studied the Korean tourism industry and concluded that economic expansion leads to economic growth. Kulendraçan and Wilson (2000) observed a strong reciprocal relationship between international trade and international travel. Balaguer and Cantavella-Jorda (2002) studied the role of tourism's long-run economic development. They confirmed that the tourism is an important tool for economic growth. Dritsakis (2004) showed that tourism has a long-run economic growth effect for Greece. Eugenio-Martin et al. (2004) investigated the relationship between tourism and economic growth for Latin American countries from 1985 to 1998. The findings indicated that tourism development can contribute to the economic growth of medium or low-income countries, while such a role is vague for developed countries. Guduz and Hatemi (2005) found empirical support for the tourism-led growth hypothesis in case of Turkey.

Oh (2005) studied the Korean tourism and concluded that the increase in tourism income effects economic growth. Fayissa and Tadasee (2007) using a panel data of 42 African countries, concluded that receipts from tourism industry significantly contribute to economic growth of Sub-Saharan African countries. Lee and Chang (2008) found the unidirectional relationship running from tourism towards growth in case of OECD countries whereas a bidirectional causality relationship exists for non-OECD countries. These research papers presented the importance of tourism as a significant growth enhancing factor; but very few studies have highlighted that

the tourism can lead economic growth in India. Thus there was a need to elicit the influence of tourism development on economic growth in India.

**Objectives of the Study-** Following are the specific objectives of the study:

1. To study the growth and development of tourism industry in India.
2. To study the contribution of tourism sector in GDP and employment in India.

## Data Base and Research Methodology

For the data collection, secondary sources have been used such as websites of Ministry of Tourism of India, Tourism Corporations, Bureau of Immigration, Govt. of India, World Tourism Organization (WTO), World Travel and Tourism Council (WTTC) and Annual reports of Tourism Ministry, India. Foreign tourist arrivals (FTAs) and Foreign exchange earnings (FEEs) data have been taken for the period of 21 years i.e. 1991 to 2011 from the website of World Tourism Organization. Data for the domestic and foreign tourists' visits has been taken from Bureau of Immigration, Govt. of India. Data for GDP and employment has been taken from World Travel and Tourism Council (WTTC). Compound Annual Growth Rate (CAGR) has been calculated to analyze the data. The formula used for CAGR is as follows.

$$\text{CAGR} = ((\text{End Value}/\text{Start Value})^{1/(\text{Periods} - 1)}) - 1$$

## Discussion and Analysis of Growth and Development of Tourism in India

India is full of attractions so lots of tourists visit here. Table no. one presents the number of Foreign Tourists Arrivals (FTAs) in India during the period of 21 years i.e. 1991 through 2011 along with growth rates. Tourism in India has registered a significant growth in recent years. In May, 1992 the National Action Plan for tourism was announced to motivate private sector for their participation in the tourism sector.

Moreover, the credit for the increase in foreign tourists' arrival goes to the Planning Commission because it allotted funds for the development of tourism infrastructure during the eighth five year plan. There had been a remarkable growth from the year 2002 to 2005 in foreign tourists arrival due to the various efforts made by government of India including promoting India through the 'Incredible India' campaign in overseas markets which led to increase in tourism growth by about 65 percent during the period of three years i.e. from the level of 2.38 million in 2002 to 3.92 million in 2005.

**Table 1: Foreign Tourists Arrivals (FTAs) in India, 1991-2011**

| Year | FTA in India (in Million) | % Change over the Previous Year |
|------|---------------------------|---------------------------------|
| 1991 | 1.67                      | -                               |
| 1992 | 1.86                      | 11.3                            |
| 1993 | 1.76                      | -5.5                            |
| 1994 | 1.88                      | 6.9                             |

|             |              |      |
|-------------|--------------|------|
| <b>1995</b> | 2.12         | 12.6 |
| <b>1996</b> | 2.29         | 7.7  |
| <b>1997</b> | 2.37         | 3.8  |
| <b>1998</b> | 2.36         | -0.7 |
| <b>1999</b> | 2.48         | 5.2  |
| <b>2000</b> | 2.65         | 6.7  |
| <b>2001</b> | 2.54         | -4.2 |
| <b>2002</b> | 2.38         | -6.0 |
| <b>2003</b> | 2.73         | 14.3 |
| <b>2004</b> | 3.46         | 26.5 |
| <b>2005</b> | 3.92         | 13.3 |
| <b>2006</b> | 4.45         | 13.5 |
| <b>2007</b> | 5.08         | 14.3 |
| <b>2008</b> | 5.28         | 4.0  |
| <b>2009</b> | 5.16         | -2.2 |
| <b>2010</b> | 5.77         | 11.8 |
| <b>2011</b> | 6.29         | 9.01 |
| <b>CAGR</b> | <b>6.85%</b> |      |

Source: WTO, 2011

For the Indian tourism sector the year 2008-09 has been a year of challenge and response with a drop seen in number of foreign tourists due to impact of the global economic crisis, out broken of H1N1 influenza and terrorist attacks at Taj Hotel and other significant locations in Mumbai. Nevertheless Indian tourism sector outperformed the global growth of 2 percent in international tourists' arrival in 2008.

FTAs, in India during the year 2010 were 5.77 million with a growth rate of 11.8 percent as compared to the FTAs of 5.16 million and growth rate of -2.2 percent during the year 2009. The major reason for growth rate in foreign tourists' arrival in the year 2010 was Commonwealth Games. The 9.01percent growth rate in FTAs for the year 2011 over the year 2009 for India is much better than World Tourism Organization (WTO)'s growth rate of 7 percent for the world during the same period. The compound annual growth rate (CAGR) in FTAs in India during the period 1991 through 2011 was 6.85 percent.

Tourism is an important sector of Indian economy and contributes substantially in the country's Foreign Exchange Earnings (FEEs) also. Table no. two depicts the foreign exchange earnings from tourism in India during the period 1991 through 2011 and also its growth rate over previous year.

**Table 2: Foreign Tourists Arrivals (FTAs) in India, 1991-2011**

| Year        | FEE from Tourism in India(in US\$ Million) | % Change over the previous year |
|-------------|--|---------------------------------|
| 1991        | 1861                                       | -                               |
| 1992        | 2126                                       | 14.2                            |
| 1993        | 2124                                       | -0.1                            |
| 1994        | 2272                                       | 7.0                             |
| 1995        | 2583                                       | 13.7                            |
| 1996        | 2832                                       | 9.6                             |
| 1997        | 2889                                       | 2.0                             |
| 1998        | 2948                                       | 2.0                             |
| 1999        | 3009                                       | 2.1                             |
| 2000        | 3460                                       | 15.0                            |
| 2001        | 3198                                       | -7.6                            |
| 2002        | 3103                                       | -3.0                            |
| 2003        | 4463                                       | 43.8                            |
| 2004        | 6170                                       | 38.2                            |
| 2005        | 7493                                       | 21.4                            |
| 2006        | 8634                                       | 15.2                            |
| 2007        | 10729                                      | 24.3                            |
| 2008        | 11747                                      | 9.5                             |
| 2009        | 11394                                      | -3.0                            |
| 2010        | 14193                                      | 24.6                            |
| 2011        | 16564                                      | 16.70                           |
| <b>CAGR</b> | <b>11.55%</b>                              |                                 |

Source: WTO, 2011

The “Incredible India” campaign was one of the most successful campaign and its results were reflected in increase in the foreign exchange earnings (FEEs) also. As highlighted by the table no. two above, the international tourism receipts were stagnated around 3000 million before the launch of “Incredible India”. After its launch in 2002, results evidently show the significant growth in foreign exchange earnings. FEEs from tourism during the year 2010 were US\$ 14193 million as compared to US\$ 11394 million during the year 2009 and US \$ 11747 million during the year 2008. The growth rate in FEEs in US\$ terms during the year 2010 was 24.6 percent as compared to a decline of 3 percent in the year 2009 over the year 2008. But, there is decline in foreign exchange earnings in the year 2011. Thus, growth rate observed in the year 2010 was substantially high. The compound annual growth rate (CAGR) in FEEs in India during the period of 21 years i.e. from the year 1991 to 2011 was 11.55 percent.

Table no. three presents the statistics of domestic and foreign tourists who visited India during the year 1991 to the year 2010. As seen from this table, there has been a continuous increasing trend in domestic tourist visits, with the compound annual growth rate (CAGR) of 13.50 percent.

The foreign tourists' visits too have been increasing over the years, though there was a negative growth in the year 1992 and in the year 2002. The foreign tourist visits to India during the year 1991 to the year 2011 witnessed a CAGR of 9.56 percent.

**Table 3: Domestic and Foreign Tourist Visits to India (Numbers), 1991-2010**

| Year        | No. of Tourists |              | Annual Growth Rate |         |
|-------------|-----------------|--------------|--------------------|---------|
|             | Domestic        | Foreign      | Domestic           | Foreign |
| 1991        | 66670303        | 3146652      | -                  | -       |
| 1992        | 81455861        | 3095160      | 22.2               | -1.6    |
| 1993        | 105811696       | 3541727      | 29.9               | 14.4    |
| 1994        | 127118655       | 4030216      | 20.1               | 13.8    |
| 1995        | 136643600       | 4641279      | 7.5                | 15.2    |
| 1996        | 140119672       | 5030342      | 2.5                | 8.4     |
| 1997        | 159877208       | 5500419      | 14.1               | 9.3     |
| 1998        | 168196000       | 5539704      | 5.2                | 3.7     |
| 1999        | 190671034       | 5832015      | 13.4               | 5.3     |
| 2000        | 220106911       | 5893542      | 15.4               | 1.1     |
| 2001        | 236469599       | 5436261      | 7.4                | 7.8     |
| 2002        | 269598028       | 5157518      | 14                 | -5.1    |
| 2003        | 309038335       | 6708479      | 14.6               | 30.1    |
| 2004        | 366267522       | 8360278      | 18.5               | 24.6    |
| 2005        | 392014270       | 9947524      | 7.0                | 19.0    |
| 2006        | 462321054       | 11738892     | 17.9               | 18.0    |
| 2007        | 526564478       | 13256637     | 13.9               | 12.9    |
| 2008        | 563034107       | 14380633     | 6.9                | 8.5     |
| 2009        | 668800482       | 14372300     | 18.8               | -0.1    |
| 2010        | 740214297       | 17852777     | 10.7               | 24.2    |
| <b>CAGR</b> | <b>13.50%</b>   | <b>9.56%</b> |                    |         |

Source: WTO, 2011

In 1992, a national action plan was prepared which motivated major players of the tourism sector to boost up tourism industry. After its implementation, there is much improvement in domestic as well as foreign tourists' arrival. On 12 March 1993, a series of 13 bombs led to decline in tourism sector in the year 1994. The credit for increase in foreign as well as domestic tourists' arrival in the year 1997 goes to New Tourism Policy which was framed and implemented strictly by Ministry of Tourism, India. The activities of bombings like Brahmaputra Mail train bombing in the year 1996; Coimbatore bombings in the year 1998; terrorist attack on Red Fort in the year 2000; Jammu and Kashmir legislative assembly attack in the year 2001 and attack on the parliament complex in New Delhi in the year 2001 affected the international tourist arrivals adversely in India. In order to increase the foreign tourist arrivals, Tourism Ministry and Government of India promoted the "Incredible India" campaign jointly in the year 2002. The reasons for decline in tourism in 2009 were incidents such as the Mumbai terror attacks, global financial recession, increased cost pressures and increased airfare. But, still the domestic

tourists' visits are at such a higher level compared to the international tourists' visits. Apart from that, awareness level of the foreign tourists is in general higher as compared to the domestic tourists (Wikipedia, 2007). The year 2009 witnessed a growth of 18.8 percent in domestic tourist visits over the year 2008, which is higher than the growth of 6.9 percent in the year 2008 over the year 2007. During the year 2009, the visits by foreign tourists have shown a negative growth of 0.1 percent over the year 2008, as compared to an increase of 8.5 percent in the year 2008 over the year 2007.

Table no. four presents direct and total contribution of travel and tourism industry in GDP of India.

**Table 4: Domestic and Foreign Tourist Visits to India (Numbers), 1991-2010**

| Year        | Total Contribution to GDP(US\$ Billion) | Total Growth (%) | Direct Contribution to GDP(US\$ Billion) | Direct Growth (%) |
|-------------|---|------------------|--|-------------------|
| 1991        | 36.871                                  | 2.2              | 10.568                                   | 0.4               |
| 1992        | 37.992                                  | 3                | 11.012                                   | 4.1               |
| 1993        | 36.445                                  | -4               | 11.205                                   | 1.7               |
| 1994        | 42.267                                  | 15.9             | 12.469                                   | 11.2              |
| 1995        | 49.519                                  | 17.1             | 13.963                                   | 7.8               |
| 1996        | 52.544                                  | 6.1              | 15.064                                   | 6                 |
| 1997        | 60.265                                  | 14.5             | 16.832                                   | 8.3               |
| 1998        | 62.804                                  | 4.31             | 17.858                                   | 6                 |
| 1999        | 68.146                                  | 8.5              | 19.343                                   | 8.3               |
| 2000        | 74.332                                  | 9.0              | 21.828                                   | 12.8              |
| 2001        | 61.122                                  | -17.7            | 17.923                                   | -17.8             |
| 2002        | 72.443                                  | 18.5             | 21.453                                   | 19.6              |
| 2003        | 81.7                                    | 12.7             | 24.265                                   | 13.1              |
| 2004        | 87.154                                  | 6.6              | 25.331                                   | 4.3               |
| 2005        | 72.27                                   | -17              | 22.346                                   | -11.7             |
| 2006        | 73.015                                  | 1                | 25.169                                   | 12.6              |
| 2007        | 100.744                                 | 37.9             | 27.725                                   | 10.1              |
| 2008        | 68.171                                  | -32.3            | 29.15                                    | 5.1               |
| 2009        | 67.288                                  | -1.2             | 29.316                                   | 0.5               |
| 2010        | 73.312                                  | 8.9              | 31.283                                   | 6.7               |
| 2011        | 79.697                                  | 8.70             | 34.008                                   | 8.71              |
| <b>CAGR</b> | <b>3.92%</b>                            |                  | <b>6.018%</b>                            |                   |

*Source: Bureau of Immigration, Govt. of India, 2010*

Direct contribution to GDP means GDP generated by industries that deal directly with tourists, including hotels, travel agents, airlines and other passenger transport services, as well as the activities of restaurants and leisure industries that deal directly with tourists.

It is equivalent to total internal travel and tourism spending within a country less the purchases made by those industries (including imports) (World Travel and Tourism Council, 2010). Total contribution to GDP means GDP generated directly by the travel

and tourism industry plus its indirect and induced impacts (Tourism Satellite Account, 2010). Indirect contribution of tourism industry to GDP can be calculated by calculating the difference between total contribution and direct contribution. The total contribution of travel and tourism industry to GDP increased from US\$36.871 billion in the year 1991 to US\$79.697 billion in the year 2011. It was highest in the year 2007 i.e. 100.744 billion. Total real growth rate has been in the range from -32.3 percent to 37.9 percent during these 21 years. Direct contribution in GDP has been in the range from -17.8 percent to 19.6 percent. The compound annual growth rate (CAGR) of direct contribution of tourism industry to GDP was 6.018 percent whereas compound annual growth rate of total contribution to tourism was 3.92 percent in India during the year 1991 to the year 2011, which clearly reflects the contribution of the travel and tourism industry.

Tourism sector also plays an important role in creating job opportunities both in direct and indirect ways. The Indian government seeks to develop the employment in the tourism sector by setting development plans and international collaborations. Table no. five presents the total and direct contribution of travel and tourism industry to the employment. Direct contribution to employment means the number of direct jobs within the Travel and Tourism industry.

**Table 5: Total and Direct Contribution of Travel and Tourism Industry to Employment, 1990-2010**

| Year        | Total Job Opportunities (000) | Total Real Growth (%) | Direct Job Opportunities (000) | Direct Real Growth (%) |
|-------------|-------------------------------|-----------------------|--------------------------------|------------------------|
| 1991        | 37404.3                       | 6.4                   | 15265.1                        | 8.6                    |
| 1992        | 42384.5                       | 13.3                  | 17733.7                        | 16.1                   |
| 1993        | 41003                         | -3.2                  | 17975.7                        | 1.3                    |
| 1994        | 42167.6                       | 2.8                   | 17884.8                        | -6.5                   |
| 1995        | 43366.3                       | 2.8                   | 17691.4                        | -1                     |
| 1996        | 43192.9                       | -0.3                  | 17642                          | -0.2                   |
| 1997        | 45897.3                       | 6.2                   | 18373                          | 4.1                    |
| 1998        | 46749.2                       | 1.8                   | 18872.3                        | 2.7                    |
| 1999        | 47969.4                       | 2.6                   | 19175.4                        | 1.6                    |
| 2000        | 48235.2                       | 0.5                   | 23621.5                        | 23.1                   |
| 2001        | 40227.7                       | 16.6                  | 20038.3                        | -15.1                  |
| 2002        | 45184.9                       | 12.3                  | 22071.1                        | 10.1                   |
| 2003        | 48059.9                       | 6.3                   | 23271.1                        | 5.4                    |
| 2004        | 48739.3                       | 1.4                   | 23463.1                        | 0.8                    |
| 2005        | 41803.5                       | -14.2                 | 22086.9                        | -5.8                   |
| 2006        | 420277.1                      | 0.5                   | 24396.2                        | 10.4                   |
| 2007        | 47955.4                       | 14.1                  | 23569.8                        | -3.3                   |
| 2008        | 38713.8                       | -19.2                 | 25458.8                        | 8                      |
| 2009        | 36740.9                       | -5                    | 24590.3                        | -3.4                   |
| 2010        | 36783.2                       | 0.1                   | 24335.1                        | -1                     |
| 2011        | 37654.7                       | 2.36                  | 24931.3                        | 2.44                   |
| <b>CAGR</b> | <b>0.03%</b>                  |                       | <b>2.48%</b>                   |                        |

Source: World Travel and Tourism Council Statistics, 2011

Total contribution to employment means the number of jobs generated directly in the Travel & Tourism industry plus the indirect and induced contributions. Table five shows that total contribution of travel and tourism industry to employment has been increased from 37404.3(000) to 37654.7 (000) from the year 1990 to the year 2011. It was highest in the year 2004 i.e. 48739.3(000). Total real growth rate has been in the range from -19.2 percent to 16.6 percent during these 21 years.

The reason for high real growth in direct job opportunities was the investment made by central government in hospitality sector, airlines and other passenger transportation services in the year 2000. On the other hand in the year 2001, government invested only in induced and indirect activities to motivate the tourism sector and ignore the investment in direct job opportunities due to lack of finance (Planning commission, 2007). The collaboration with international players e.g. Action Plan on tourism cooperation between India and Singapore in 2009, Action Plan between India and Russia in 2008 and collaboration of India and Indonesia in hospitality sector raises the direct job opportunities in the year 2006. The direct contribution of travel and tourism industry to the employment increased from 15265.1(000) to 24931.3(000) from the year 1990 to 2011. The direct contribution of travel and tourism industry to employment was highest in the year 2000 with 23.1 percent share in Indian economy. Total real growth rate has been in the range from -15.1 percent to 23.1 percent during these 21 years The CAGR in direct job opportunities was 2.48 percent whereas CAGR in total job opportunities was 0.03 percent in India during 1991 to 2011.

## Conclusions and Suggestions

Tourism is one of the key sectors of the Indian economy leading the international trade in services and representing the leading income activity for many regions. Tourism industry in India is growing and it has vast potential for generating employment and earning large amount of foreign exchange too besides giving a support to the country's overall economic and social development. Tourism in India should be developed in such a way that it accommodates and entertains visitors in a way that is minimally intrusive or destructive to the environment. Moreover, since tourism is a multi-dimensional activity, and basically a service industry, it would be necessary that all wings of the Central and State governments, private sector and voluntary organizations become active partners in the endeavor to attain sustainable growth in tourism if India is to become a world player in the tourism industry. The events like Commonwealth Games and Cricket World Cup have contributed a lot to promote tourism in India. A policy implication which may be drawn from this study is that India can improve its economic growth performance by strategically harnessing the contribution of the tourism industry and improving their governance performance. Since tourism is an important engine of local development, it is necessary to increase domestic tourism too in order to have more decentralization of local development caused by such activity.

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