

# INDIAN HOSPITALITY INDUSTRY: GROWTH AND EMERGING ISSUES

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## ABSTRACT

The hospitality sector in India is rapidly growing and flourishing with time. It is constantly reinventing itself to compete on an international level. With the Indian economy rising, India is increasingly becoming an extremely sought after tourist and business destination. By the very nature of hospitality as a service industry, its proficient management and successful operation depend largely on the quality offered to the customers. The problem in the hospitality sector is also increasing with its expansion and the demanding customers. This growth will need to be serviced by a substantial increase in infrastructure, including air-road, rail connectivity as well as hotels and restaurants. High standards of service are particularly important in sustaining long-term growth, since success is determined not only by price competitiveness but also by the quality of the services provided. This paper elaborates the issues and constraints relating to the challenges faced by the hospitality industry and also suggested the recommendations to fill the gap. In order to do so Indian hospitality industry needs to be packaged well and one needs to move away from the discriminatory mindset that the hospitality industry has been associated with in the past. Quality in the hospitality and hospitality industry involves consistent delivery of products and guest services

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according to expected standards. Delivering quality service is one of the major challenges the hotels will be facing in the following years as it is an essential condition for success in the emerging, intensely competitive, global hospitality markets.

**Keywords:** quality, service, hospitality and tourism

## **Introduction**

India is one of the most booming sectors in the case of economy in the world. The Hospitality and tourism is one of the main industries in India, which own about 8.78% of its workforce and around 6.20% of its Gross Domestic Product (GDP). Hospitality industry is one of the major industries that earn foreign exchange for the country and it is known as the most profitable industry. Out of all hospitality units, the accommodation industry earns most of the revenue. Other service units like attractions, travel operators, transporters etc. also plays a vital role. The industry has a very good possibility due to the government initiatives for the hospitality sector, and positive influence of the demand supply scenario etc. the hospitality and travel sector in India is expected to grow by 8.6% between 2013 to 2020 that will place India at the third position in the world. In order for the hotel sector to be a major economic value generator the occupancy rates need to be much higher than the industry average of 60-65%.

India is a vast country with diverse cultures, traditions, cuisines, languages and landscapes that attract tourists from all over the globe. The industry professionals are innovating and developing new ideas to attract more and more tourists every year. India as a rapidly growing tourism sector attracts major hospitality units like Radisson, Accor, Holiday Inn, Starwood, Carlson, Wyndham hotels and Hilton and few more yet to come in near future. With its unique mix of folklore, culture and modernity it is a must visit on the list of destinations for international traveler.

Some of the main features of the Indian hospitality industry include the following:

- In India, the hospitality industry is developed more in the metropolitan cities. These cities like Delhi, Mumbai etc. earn about 75% to 80% of the total revenue earned by the industry.
- The average room rate (ARR) and occupancy rate (OC) are the two most important factors that determine profitability. ARR depends on location, brand image, star rating, quality of facilities and services offered. The occupancy rate depends on other seasonal factors like monsoon, weather, holidays, festivals and fairs etc.
- India is a very famous destination for tourists from all over the world. The yearly data shows around 5 million tourists visiting India. That proves high the growth of the industry in India.
- The popular hotel chains of the world are opening their hotels in India very rapidly. In the same way Indian Hotel chains like Taj hotels or Oberoi hotels are opening their

properties in nearly all the famous tourist destinations in the world. The increasing accommodation and food facilities are presenting a number of very good packages to the tourists.

The leading hospitality industry in India becomes very popular and recognized in the world as one of the major revenue generator. This also shows the growth and prosperity of India. The food and accommodation available at a particular place defines the culture and customs of the place, which attracts tourists rapidly. The increasing standard of living has made the domestic tourists more demanding of the luxury. That is why, the hospitality industry is changing and improving all the facilities for the potential customers. The industry is continuously changing all the facilities and improving itself for the effective service. The luxurious rooms of before 5 years have become the standard rooms of these days and all the latest techniques like an E- room with all standardized facility is being provided to the guests.

“The globalization of the hospitality industry has accelerated under the pressures of the advances in technology, communication, deregulation, elimination of political barriers, global developments as well as the growing competition in the global economy” (Teare and Olsen, 1999).

The hospitality industry in India is booming day by day. It is enriching the country's economy and providing benefits to the owners and the tourists both. The industry has shown its presence in the developing economy of the country. A large no of people are getting benefits because of the hospitality industry directly or indirectly. The industry has provided employment to millions both skilled and unskilled. Various sectors of the industry like hotels, travel agencies, transporting etc. are already getting the business and providing the livelihood to their employees. It is the industry that collects maximum foreign exchange for the country. It is also promoting Indian culture in every part of the world. The tourists get the benefit of feeling the deep Indian culture. They watch traditional dances, taste Indian cuisines, and interact with the people, purchases handicraft items. India has become one of the must visit places in the world. The tourists visit different places in India. They enjoys the natural beauty like hill stations, landscapes, backwaters, or seek religious interest like Puri Jaggannath, Haridwar, Rameshwaram etc. tourists also visit the historical monuments, forts, havelis like Taj Mahal, Lalqila etc. India is probably the only country that offers various categories of tourism.

### **Research Methodology**

The research design will be descriptive in nature. The method of data collection will be mainly based on secondary data. The data is collected through various sources like secondary data from various magazines, journals, scholarly articles, research papers and various authentic websites of various Hospitality industries. The sources of Secondary data would be the information collected from the relevant journals, publications, and the websites offering information about hospitality industry. While designing data collection procedure, adequate safeguards against biases will be taken. During the collection period, data will be examined for completeness, comprehensibility, consistency and reliability.

The entire study will consist of numerous activities which are expected to be performed that will incorporate predominantly the phases of collecting, classifying, organizing and evaluating data, testing of hypotheses, drawing inferences and relating conclusion in order to minimize the problems and seeking the solutions thereof.

## **GROWTH OF INDIAN HOSPITALITY INDUSTRY**

The Indian hospitality industry is not a new born baby but it has shown its rapid growth in recent few years. With the opening of the Taj Mahal hotel Mumbai, in 1903, the hospitality Industry in India laid forward a giant leap in the luxury segment of hotels. The boom in the industry is noticed in the last couple of years. The improvement in aviation sector, the government support, the private sector and India's strong GDP performance has taken the hospitality industry in India to a successful position. Indian hospitality industry is also attracting the foreign investors that we can see in the form of many foreign chain hotels like Hilton, Carlson group, Hyatt etc. and many more are yet to come. The domestic players as well as new born groups are also adding their properties in to the industry.

The occupancy levels in India are grown tremendously in about last 15 years. After China, India has the highest growth in the sector of hospitality in Asia Pacific. The tourists visiting India is growing day by day and the requirement of the rooms is also increasing accordingly. The demand of the rooms in India is expected to increase about 10 million till 2015.

The hotel chains in India are also growing day by day. There is a shortage of 150, 000 rooms all over India. According to the World Travel and Tourism Council, India, the business travel in India is positioned at the 18<sup>th</sup> rank and expected to reach among the fifth position in the coming ten years. In the next two years the demand of the rooms is expected to grow just double. In the next two years the occupancy rate would jump to 80% and the room rate will rise 25% per year.

The foreign hotel chains are also seeking opportunity to open their properties in India. The Indian government has approved about 300 hotels including luxury and business hotels. The manpower requirement is expected to increase in millions.

The hotel industry in India is expected to grow 15% annually. Many hotel chains are already open in India and many more is expected to open in the coming few years. Therefore the opportunity in India for hotel professionals is growing very fast.

There are a lot of possibilities in the hotel industry in India but there are some constraints also. The high cost of land is one of them. The investors do not want to put their money on hotels because of the high costs. Constructing a new luxury hotel costs the capital investment of about 200 crore and more. Because of the higher cost of construction, there is a mismatch between the occupancy rate and increasing prices. The average room rate for a luxury room has also gone up from Rs. 4000 to Rs. 10000 in last five years.

Some other reasons of the slow growth of hotel industry in India are also there like the taxes. Every state charges different taxes. The multiplicity of the taxes is also there like the hotels have to pay VAT plus service taxes at the same time. The FHRAI suggests that the floor area ration of the existing hotels should be increased but it is not implemented yet.

The expected growth of hotels industry in next two years is about more than 20%. It is why the hoteliers are putting their money and efforts to make new hotels or adding new rooms in the already existing hotels.

The hotels are expanding huge amount in upgrading their properties and services. The hotels are also making their hotels of different types like luxury hotels or business hotel for example Taj group itself has their three categories by the name of Taj Hotels, The gateway hotels and Ginger hotels. By this way the hotels are increasing their profits. Several hotels are being constructed every year in India. They are adding about 1000 rooms every year in the Indian hotel Industry.

### **ISSUES AND CHALLENGES FACED BY THE HOSPITALITY INDUSTRY**

‘The Indian hotel industry is looking very good because the kind of growth expected over the next couple of years or more is to the tune of 15-20%’. Given these healthy growth projections, it is no wonder that the Indian hotel sector is undergoing a period of evolution and becoming an increasingly competitive environment. The challenge associated with international hotel chains expanding their footprint into India is that the country has historically been a less competitive environment compared with other regions (like North America and much of Western Europe) and smaller independent hotel operators face real risks given that international hotel chains traditionally bring advanced technologies, processes and market strategies. Local hoteliers in India often don't have the resources to compete with the large global hotel chains in terms of marketing budgets and investment in third party booking channels, or have the well-recognized brand name that goes hand-in-hand with these activities. However, there are a number of strategies that mid-level hotels can implement now to ensure that they are maximizing their revenue and securing customer loyalty for the future. It's important, as a hotelier in India, to maximise the ROI on all resources. Utilizing data and analytics is the best way to determine marketing and pricing strategies for the future. Local hoteliers need to ensure they have detailed data that is both historical and forward looking. Historically, the data should include (at least) the number of occupied rooms, coupled with revenue by market segment by day.

### **Multicultural Issues**

The newest trends and topics surrounding hospitality research and development is the management of multicultural talent and the political landscape affecting the hospitality industry. Franchise is becoming the biggest industry in the world, the success of franchise lie in the understanding of ownership, internal and external customer- and workforce-related – and top legislative matters, insights of marketing and promoting. With the development of globalization, multicultural issues are facing and disturbing the industry operators. Bringing the far corners of

the world together is part and parcel of what the hospitality sector does. Blending amenities to cater for the needs of the world's different cultures is central to success for large, international hospitality chains. Cultural issues have never before been such a crucial determinant of how a large hospitality should operate. In some Asian cultures, for example, eye contact is not sought, as it can make guests feel uncomfortable, while in Western tradition it is equated with openness and honesty. This could be important in defining how staff addresses themselves to certain Asian guests.

### **Manual labor Cost Issues**

In 2005, labor expenses remained the largest single expense item for hospitality managers, accounting for 44.6 per cent of total operating costs. Consequently, any trend or issue that could potentially impact labor costs must be taken seriously by hospitality owners and managers alike. "Due to the magnitude of the expense, labor costs and issues have always consumed a substantial portion of the time and efforts of hospitality managers. Now, with news of union contact negotiations, changes to immigration laws, and proposed legislation to increase the minimum wage, hospitality managers are on edge. The cost of labor is the biggest expense in all categories of hotels. Even with the advent of select-service properties, hospitality developers cannot avoid the human component of hospitality operations. While managing labor expenses is important, hospitality managers are also aware that employees are an integral part of the lodging experience. The interaction between hospitality guests and employees has a dramatic impact on the customer experience and the success of the business operation. Therefore, a fine balance must be drawn between cost controls and guest satisfaction.

### **Increased Competition**

Hotels everywhere indicate that their community is overbuilt; there are too many available hospitality rooms relative to the guests desiring to rent them. The resulting competition, which often involves price cutting in efforts to provide greater value to guests, reduces still further the profits generated. A steep fall in occupancy ratio in the wake of the global slowdown and tight competition among hospitality operators in a shrinking market have brought down hospitality room rents drastically across the country. The competition in Europe has resulted in low occupancies and as a result, the average room rate has taken a beating of almost 30 per cent in all major leisure markets. Rooms are now sold not only for less but also bundled with packages, like breakfast, airport transfers or a day's sightseeing.

## **COMPETITION CALLS FOR INNOVATION IN HOSPITALITY INDUSTRY**

### **Rising Cost**

Hospitalities are increasingly challenged to find ways to reduce costs without sacrificing the quality standards imposed to consistently meet guest expectations. The idea of "doing more with less" requires managers to think about ways to operate more effectively (in other words to "do

the right things in the right way”) and to examine possibilities for cost savings that will not affect the guest’s perception of value.

### **Manpower Shortages**

Manpower shortages and their impact on the industry in almost every geographic location are consistently among the most difficult challenges noted by hotels. In many communities, hospitality expansion is limited not by capital, but rather by human resources. A shrinking labor force is the number one challenge facing the global hospitality industry, according to the International Society of Hospitality Consultants, which recently convened to brainstorm world issues and rank them according to importance. The problem of attracting and retaining qualified workers, once an issue only in an isolated number of markets, is increasingly becoming a global challenge. Demography, wage levels, failure to adequately address worker satisfaction and a reputation for long hours and low pay are all cited as contributing factors. Creative hospitality professionals have begun to develop innovative strategies for capturing and keeping high quality workers.

### **Higher Education**

Tremendous changes are taking place in hospitality industry which poses several challenges for transformation of the whole educational process including educational curricula, learning materials, instructional practices and education stakeholders. Education systems and institutions must take the challenges of the knowledge economy seriously. This would, however, include restructuring the learning process to reflect the use of information in the real world, changing the role of the educator from presenter of pre-packaged facts to facilitator of active learning and transforming the library specialist to an active collaborator in curriculum planning for effective use and availability of information resources. Indeed, educators need to realize that teaching is not telling, that learning is not absorbing and that

knowledge is not static and, in turn, reflect these to their instruction mechanisms and student appraisal systems. The new educational providers have risen in order to fill the undeniable demand for open, flexible, distance and life-long learning and include for-profit universities; corporate universities (e.g. the Accor University, the Kellogg University, McDonalds Hamburger University); virtual universities (such as Universities 21, a collaboration project of Thomson Learning and Universities 21, Singapore and University in the UK); and multinational organizations such as Microsoft, whose primary business is not education but who control facilities central to it.

### **Interactive Reservation Systems**

Guests can now use the Internet’s interactive reservation systems, and hospitality companies are sometimes criticized for the (alleged) large number of keyboard clicks required to make a reservation. The number of reservations made via the Internet continues to increase. Surveys in

the United States show that currently 20% of all reservations are made through the Internet, and this percentage is increasing every year. With such high percentage of reservations done through the Internet, hospitality cannot afford not being connected. If the potential guest cannot book online, a reservation will be made at the competitor's web site. Multiple telephone lines, interactive opportunities for ordering room service, and guest-room check-out are examples of amenities that guests increasingly desire, but that are very expensive to install and implement.

### **Yield Management**

This computerized process allows managers to match guest demand with room rates (high demand means higher rates because of lessened discounts; low demand result in higher discounts.) (yield management: demand forecasting systems designed to maximize revenue by holding rates high during times of high guest-room demand and by decreasing room rates during times of lower guest-room demand). Yield management is critical to maximizing hospitality's profitability. The concept is applied to every revenue department and across department. The yield manager's job is to maximize the revenue per available room by selling rooms to the right customers, at the right price, at the right time.

### **Globalization**

Globalization impacts the lodging industry dramatically because it influences the extent of which people travel both within the country and around the world. Therefore, it is not only the economy of the nation, but also the economies of individual countries, that play an increasingly larger role in the financial success of lodging properties. To compete, they must pay closer attention to the trends of globalization. The industry must reflect the requirements of the global village in many aspects of its operations, including food, services, amenities, staffing policies and training. Consumers have become more sophisticated and, as a result, so have the types of products and services that they desire. Amenities, including business centers, exercise and recreational facilities, and guest-room innovations, increase costs but, if not carefully selected, may not appeal to many guests being served by a specific property.

### **Cost of the land**

The rapid rise of development during the past decade has seen land costs skyrocket, sources said. The outrageous prices can now account for upwards of 45% of expenditures for hotel construction—or higher when plots of land are opened via auction. Bidding of land in urban cities for hotel purposes is a no go. Alternative option would have state governments identify plots for hotel development and offer them to investors at a discounted price in exchange for revenue sharing. The arrangement has found success, as long as the deal is structured in a transparent, competitive manner. Any given hotel project requires 70 to 120 permits, Not only does this web of bureaucracy add costs, but it extends the typical development cycle to five or seven years.

## CONCLUSION

The hotel industry is maturing, getting right there where the growing economy is driving it. The supply of hotels is set to increase and a few years from now, it is expected to match the demand. As a result, prices will stabilise and become more realistic, Pricing is also expected to become more in sync with the quality of product and also its delivery, both getting equal recognition among providers as well as the end consumers. The hospitality sector will therefore begin to offer truer value for money. The hotel product will be offered more transparently in the market, it will become more international in its appeal and offering. The increasing demand and pressure for excellence is resulting in India beginning to create some of the best hotels and resorts. Many of the world's leading hotel chains have entered the Indian market and more are coming in. Thus, a wider range of hotels, catering to various niches, and segments, will come around. India's hotel industry in ten years time will adhere to international best practices. Despite efforts being made it appears that the human resource shortage will remain a challenge over the coming years. Within the industry, each chain or stand alone hotel has developed training, recruitment and retention programmes and some have even established hotel schools. However, high staff turnover yet persists nationwide, with hotels not being the most preferred industry, when compared to many other sunrise industries. Industry professionals view this as a predicament that has to be willingly dealt with, and something that cannot be ignored for too long.

A recommendation after conducting this research is that there is a need for greater study of the hospitality industry. Most information is by way of newspaper reports. Decisions are made less on the basis of research and analysis and more on the basis of experience and intuition. There are just a few consulting agencies, with great scope for many more, considering the growing size of the industry. Beyond a certain degree, the existing research and analysis base is unable to cope with the demands of the industry. The industry should also work on improving and updating their global marketing systems. Online reservation is the future and Indian hoteliers have to recognize this fact and invest finances in promoting online bookings. Also efforts should be made that what is taught in hospitality schools should be the reality of the work place. Better salaries should be given and working hours need to lessen.

On the whole, the outlook for the hospitality market in India is optimistic and will continue to remain so. The economy's buoyancy, initiatives to improve infrastructure, growth in aviation and real estate sectors and the easing of restrictions will fuel demand for hotels across star categories in the majority of markets. It is through in-depth research and planning that the Indian hospitality industry will truly reach its potential. Essentially, my impression was that the industry will mature, as the economy size grows, and India integrates with the global best practices.

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Even though it is a concept new to the Indian market, hoteliers are fast realizing the profitability potential of providing distinct facilities for exhibitions and conventions. The role of food and beverages has also significantly changed and it today holds more importance than before. Managers are aiming at equating their revenue from room and F&B. It is today a central part in the marketing and promotion of hotels in India. Despite efforts being made it appears that the human resource shortage will remain a challenge over the coming years. Within the industry, each chain or stand alone hotel has developed training, recruitment and retention programmes and some have even established hotel schools. However, high staff turnover yet persists nationwide, with hotels not being the most preferred industry, when compared to many other sunrise industries. Industry professionals view this as a predicament that has to be willingly dealt with, and something that cannot be ignored for too long. A recommendation after conducting this research is that there is a need for greater study of the hospitality industry. Most information is by way of newspaper reports. Decisions are made less on the basis of research and analysis and more on the basis of experience and intuition. There are just a few consulting agencies, with great scope for many more, considering the growing size of the industry. Beyond a certain degree, the existing research and analysis base is unable to cope with the demands of the industry. The industry should also work on improving and updating their global marketing systems.

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