

2019

# STUDY ON EMPLOYMENT LEVEL AND SKILL GAP ANALYSIS IN HOSPITALITY AND ALLIED SECTORS

Final Report

Ministry of Tourism,  
Government of India

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## Table of Contents

Executive Summary.....	1
1. Introduction .....	13
1.1 Background .....	13
1.2 Objective .....	15
1.3 Scope of Work.....	16
1.3.1 Key Deliverables.....	16
1.3.2 Other Deliverables .....	17
1.4 Approach & Methodology .....	18
1.4.1 Research Approach .....	18
1.4.2 Preparatory Phase.....	19
1.4.2.1 Finalization of list of establishments.....	20
1.4.2.2 Information areas.....	20
1.4.2.3 Segment coverage.....	22
1.4.2.4 Sampling Procedure .....	23
1.4.2.5 Sample Size .....	27
1.4.2.6 Geographical coverage.....	28
1.4.3 Estimation .....	31
1.4.3.1 Methodology of Estimation .....	31
1.4.4 Operational Methodology.....	39
1.4.4.1 Meeting Ministry of Tourism .....	39
1.4.4.2 Desk Review .....	39
1.4.4.3 Questionnaire Preparation .....	41
1.4.4.4 Pre-Testing of Questionnaires .....	41
1.4.4.5 Training of Field Teams .....	42
1.4.4.6 Quality Control & Monitoring .....	42
1.4.4.7 Data Collection .....	44
1.4.4.8 Analysis .....	44
1.4.4.9 Report .....	44
1.5 Estimated Total No. Of Units in 66 locations under study post Physical Scanning Exercise .....	45
2. Findings.....	49

2.1.	Demand Side .....	49
2.1.1.	Accommodation Units .....	49
2.1.1.1.	Profiling of the Units .....	49
2.1.1.2.	Trends in Tourist visits .....	51
2.1.1.3.	Trends in addition of no. of rooms .....	52
2.1.1.4.	Trends in addition of no. of employees .....	53
2.1.1.5.	Types of Rooms available.....	55
2.1.1.6.	Manpower deployment at the Zonal Level.....	57
2.1.1.7.	Manpower deployment at the accommodation units of different types.....	58
2.1.1.8.	Trends in deployment of manpower by Unit establishment.....	59
2.1.1.9.	Trends in manpower deployment by Departments.....	60
2.1.1.10.	Manpower deployment at the accommodation units by Departments.....	62
2.1.1.10.1.	Food & Beverage Department.....	62
2.1.1.10.2.	Food & Beverage Service Department .....	64
2.1.1.10.3.	House Keeping & Front Office Department.....	66
2.1.1.10.4.	HR Administration, Accounts and Purchase .....	69
2.1.1.10.5.	Other Ancillary Functions .....	70
2.1.1.11.	Investment Required in terms of Employees and Rooms in Accommodation Units..	72
2.1.1.11.1.	Rooms and Seats to be added .....	72
2.1.1.11.2.	Employees to be added in Accommodation Units.....	73
2.1.1.12.	Investment Required in Accommodation Units.....	74
2.1.2.	Restaurants .....	75
2.1.2.1.	Profiling of the Units .....	75
2.1.2.2.	No. of Seats .....	76
2.1.2.3.	No. of Seats/ Unit Establishment .....	77
2.1.2.4.	Zonal distribution of No. of Seats/ Unit Establishment .....	77
2.1.2.5.	Addition of No. of Seats over last 5 years.....	78
2.1.2.6.	Trends in deployment of manpower .....	79
2.1.2.6.1.	Overall trends in deployment .....	79
2.1.2.6.2.	Deployment by Type of Unit.....	80
2.1.2.6.3.	Deployment by Designations .....	80
2.1.2.7.	Investment Required in terms of Employees and Seats .....	82

2.1.2.7.1. Seats to be added .....	82
2.1.2.7.2. Employees to be added .....	83
2.1.2.8 Self-Employment in Hospitality Industry .....	84
2.1.3. Tour Operators and Travel Agents.....	85
2.1.3.1. Profiling of the Units .....	85
2.1.3.2. Manpower Deployed – On the roll vs. Contractual/Third party.....	86
2.1.3.3. Manpower Deployed – By Type of Functions .....	87
2.1.3.4. Manpower deployed in tours and travel agents – by designations.....	88
2.1.4. Outdoor Banquets.....	89
2.1.4.1. Profiling of the Units .....	89
2.1.4.2. Manpower Deployed – On the roll vs. Contractual/Third party.....	89
2.1.4.3. Manpower Deployed – By Type of Designations .....	90
2.1.5. SPA’s.....	91
2.1.5.1. Profiling of the Units .....	91
2.1.5.2. Manpower Deployed – On the roll vs. Contractual/Third party.....	91
2.1.6. Medical Units catering to foreign tourists .....	92
2.1.7. E Portals .....	93
2.1.8. Mobile Catering Units .....	97
2.1.8.1. Overall Market Size of Contract Catering Business in India .....	97
2.2. Supply Side - Hospitality Training Institutes .....	99
2.2.1. Top Disciplines .....	99
2.2.1.1. Enrolment Trends.....	99
2.2.1.2. Pass out Trends .....	99
2.2.2. Manpower and Salary Trends .....	100
2.2.3. Soft Skill trainings imparted .....	101
2.2.4. Major Barriers for Hospitality Institutes .....	102
2.2.5. Perceived Skill Gap and means to address them in different disciplines .....	103
2.2.6. Investment Required in Hospitality Institutes .....	104
2.3 Skill Assessment & Gap in Hospitality Establishments .....	106
2.3.1 Accommodation:.....	106
2.3.2 Restaurant.....	118
3. All India Estimates for Hospitality Establishments.....	145

3.1.	Accommodation Establishments/Hotels .....	145
3.1.1.	Estimation at Current level (All India) for Accommodation Units .....	145
3.1.1.1.	Estimated Number of Accommodation Units .....	145
3.1.1.2.	Estimated Number of Rooms in Accommodation Units .....	153
3.1.1.3.	Estimated manpower hired in Accommodation Units.....	159
3.1.1.4.	Estimated Annual Attrition in Accommodation Units.....	161
3.1.2.	Estimation at Future Level (All India) in Accommodation Units .....	163
3.1.2.1.	Future Room Requirement in Accommodation Units .....	163
3.1.2.2.	Estimated Manpower in future in Accommodation Units.....	164
3.1.2.3.	Estimated Attrition (including retirement) level at Future in Accommodation Units 168	
3.2.	Restaurants .....	170
3.2.1.	Estimation at Current Level (All India) in Restaurants .....	170
3.2.1.1.	Estimated Number of Restaurants in India .....	170
3.2.1.2.	Estimated Number of Seat and Manpower at Present in India .....	173
3.2.1.3.	Estimated Annual Attrition in Restaurants .....	175
3.2.2.	Estimation at Future level (All India) in Restaurants .....	176
3.2.2.1.	Future Seats Requirement in Restaurants .....	176
3.2.2.2.	Estimated Attrition (including retirement) for 2022 and 2025.....	183
3.3.	Tour Operator and Travel Agents .....	185
3.3.1.	Estimation at Current Level (All India) for Tour Operators and Travel Agents.....	185
3.3.1.1.	Estimated Number of Units for Tour Operators .....	185
3.3.1.2.	Estimated Manpower Hired in Tour Operators .....	188
3.3.1.3.	Estimated Annual Attrition in Tour Operators.....	189
3.3.2.	Estimation at Future Level (All India) for Tour Operators and Travel Agents.....	189
3.3.2.1.	Estimated Manpower Employed in Tour Operators Units.....	189
3.4.	Spa and Wellness Units.....	195
3.4.1.	Estimation at Current Level (All India) for Spa and Wellness Units .....	195
3.4.1.1.	Estimated Number of Spa and Wellness Units .....	195
3.4.1.2.	Estimated Manpower Hired in Spa and Wellness Units .....	197
3.4.1.3.	Estimated Annual Attrition in Spa and Wellness Units .....	198
3.4.2.	Estimation at Future Level (All India) for Spa and Wellness Units.....	198

3.4.2.1.	Estimated Number of Spa and Wellness Units .....	198
3.5.	Outdoor Banquets.....	203
3.5.1.	Estimation at Current Level (All India) for Outdoor Banquets.....	203
3.5.1.1.	Estimated Number of Outdoor Banquets .....	203
3.5.1.2.	Estimated Manpower Employed in Banquets .....	206
3.5.1.3.	Estimated Annual Attrition in Banquets .....	207
3.5.2.	Estimation at Future Level (All India) for Outdoor Banquets .....	207
3.5.2.1.	Estimated Manpower in Future at Outdoor Banquets .....	207
4	All India Estimates for Hospitality & Tourism Institutes .....	213
4.1	Estimation of Hospitality & Tourism Institutes in India .....	213
4.2	Estimation of Seats/ Capacity in Hospitality & Tourism Institutes in India at Present - 2018..	213
4.3	Estimation of Seats/ Capacity in Hospitality & Tourism Institutes in India at 2022 .....	214
4.4	Estimation of Seats/ Capacity in Hospitality & Tourism Institutes in India at 2025 .....	214
5	All India Estimated Manpower Requirement & Gap – Current & Future Levels .....	216
5.1	Estimated Manpower Requirement in India at Present (2018).....	216
5.2	Estimated Manpower Requirement in India at 2022 .....	218
5.3	Estimated Manpower Requirement in India at 2025 .....	220
5.4	Estimated Manpower in India at Present (2018).....	222
5.5	Estimated Manpower Gap in India at 2022 .....	225
5.6	Estimated Manpower Gap in India at 2025 .....	227
5.7	Estimated Untrained/ On the Job Trained Manpower in India at Current & Future Level .....	230
5.8	Suggested Ways to Mitigate the Estimated Manpower Gap in India at Current & Future Level	231
ANNEXURES	.....	232
Questionnaire for Hotels, Wellness Units, Restaurants, Cafes.....		233
Questionnaire for Travel Agents/ Tour Operators.....		248
Questionnaire for Hospitality Institute .....		259

## List of Figures

Figure 1.1 Tourism sector and economy link.....	14
Figure 1.2 Objectives of the Study.....	15
Figure 1. 3 Key Deliverables of the Study .....	16
Figure 1. 4 Other Deliverables of the Study.....	17
Figure 1. 5 Approach for the Study.....	18
Figure 1.6 Detailed activities under each approach .....	19
Figure 1.7 Detailed activities under each approach .....	20
Figure 1. 8 Information sought from different respondent groups.....	21
Figure 1. 9 <b>Segment coverage</b> .....	22
Figure 1. 10 Sampling procedure adopted.....	23
Figure 1. 11 Earmarked Geographical Zones .....	28
Figure 1. 12 Estimation Methodology – An Overview .....	31
Figure 1. 13 Estimation of Current Manpower .....	35
Figure 1. 14 Estimation of Future Manpower.....	35
Figure 2.1 Zonal Distribution of No. of Accommodation Units.....	49
Figure 2. 2 Average annual Tourist visits per Unit .....	51
Figure 2. 3 Compound Annual Growth Trends in addition of no. of rooms .....	52
Figure 2. 4 Compound Annual Growth Trends in addition of no. of employees.....	53
Figure 2. 5 No. of rooms in different zones .....	55
Figure 2. 6 Contractual/Third party and On the roll Manpower deployed in different zones .....	58
Figure 2. 7 Manpower deployment at accommodation units .....	58
Figure 2. 8 Manpower deployment trends by unit establishment .....	59
Figure 2. 9 Manpower deployment by Departments .....	60
Figure 2. 10 Zonal Distribution of No. of Sampled Restaurants .....	75
Figure 2. 11 Zonal Distribution of type of sampled restaurants.....	75
Figure 2. 12 Zonal Distribution of No. of Seats .....	76
Figure 2. 13 Zonal Distribution of No. of Seats/ Unit establishment.....	77
Figure 2. 14 Zonal Distribution of No. of Seats/ Unit establishment.....	78
Figure 2. 15 Deployment Trends in Manpower .....	79
Figure 2. 16 Deployment Trends in Manpower per unit establishment .....	80
Figure 2. 17 Zonal Distribution of No. of Sampled Travel Agents and Operators .....	85
Figure 2. 18 Zonal Distribution of type of business handled .....	85
Figure 2. 19 Zonal Distribution of nature of business handled.....	86
Figure 2. 20 Manpower deployment trends of Sampled Travel Agents and Operators.....	86
Figure 2. 21 Manpower deployment trends of Sampled Travel Agents and Operators.....	87
Figure 2. 22 Deployment by Designations in Travel Agents and Tour Operators.....	88
Figure 2. 23 Zonal Distribution of Outdoor Banquets.....	89
Figure 2. 24 Manpower deployment trends of sampled outdoor banquets.....	89



Figure 2. 25 Manpower deployment trends of sampled outdoor banquets.....	90
Figure 2. 26 Zonal Distribution of SPA's.....	91
Figure 2. 27 Manpower deployment trends of sampled SPA's .....	92
Figure 2. 28 Medical Tourism growth trends.....	92
Figure 2. 29 Medical Tourism growth trends.....	97
Figure 2. 30 Enrolment Trends in IHM's .....	99
Figure 2. 31 Pass out Trends in IHM's.....	99
Figure 2. 32 Manpower and Salary trends in IHM's .....	100

## List of Tables

Table 1.1 India’s relative position current and future as per WTTC estimates .....	14
Table 1. 2 Target sample covered in different categories .....	27
Table 1. 3 Earmarked Locations in different Zones .....	29
Table 1. 4 Physical Scanning of data from 66 locations under study.....	45
Table 2. 1 Zonal Distribution of No. of Accommodation Units.....	50
Table 2. 2 Average annual Tourist visits per Unit .....	51
Table 2. 3 Type of rooms of total rooms in the zone.....	55
Table 2. 4 Designation wise Manpower – On the roll vs Contractual/Third party .....	60
Table 2. 5 Manpower deployment and average salary level in Food & Beverage Department.....	62
Table 2. 6 Manpower deployment and average salary level in Food & Beverage Department.....	64
Table 2. 7 Manpower deployment and average salary level in Housekeeping & Front Office Department .....	66
Table 2. 8 Manpower deployment and average salary level in HR Administration, Accounts & Purchase.....	69
Table 2. 9 Manpower deployment and average salary level in HR Administration, Accounts & Purchase.....	70
Table 2. 10 Rooms planned to be added in accommodation units (2019-2025).....	72
Table 2. 11 Seats planned to be added in accommodation units (2019-2025) .....	72
Table 2. 12 On the roll Employees planned to be added in accommodation units (2019-2025).....	73
Table 2. 13 Contractual/Third party Employees planned to be added in accommodation units (2019-2025) .....	73
Table 2. 14 Total Investment Required in Accommodation Units in the planned future (2019-2025).....	74
Table 2. 15 Zonal Distribution of No. of Seats/ Unit establishment .....	77
Table 2. 16 Deployment by Designations .....	80
Table 2. 17 Function wise manpower for different level of training .....	82
Table 2. 18 Seats planned to be added in Restaurants (2019-2025).....	82
Table 2. 19 On the roll Employees planned to be added in Restaurants (2019-2025).....	83
Table 2. 20 Contractual/Third party Employees planned to be added in Restaurants (2019-2025).....	83
Table 2. 21 E Websites and their functionality .....	94
Table 2. 22 Employment trends amongst leading mobile caterers .....	98
Table 2. 23 Soft skill trainings in IHM’s .....	101
Table 2. 24 Major Barriers in different fields in Hospitality Institutes.....	102
Table 2. 25 Means to address major barriers in different fields in Hospitality Institutes .....	102
Table 2. 26 Perceived skill gap in different disciplines in Hospitality Institutes .....	103
Table 2. 27 Means to address skill gap in different disciplines in Hospitality Institutes .....	103
Table 2. 28 Investment Required to Increase hospitality Courses and student in present courses .....	104
Table 2. 29 Fund Requirement to introduce the conceived hospitality courses.....	105
Table 2. 30 Professional Skills presented to Hospitality Establishments.....	106
Table 2. 31 Desired professional skills versus the actual professional skills present in current manpower employed in Accommodations .....	106

Table 2. 32 Soft skills list presented to the establishments.....	115
Table 2. 33 Desired soft skills versus the actual soft skills present in current manpower employed .....	116
Table 2. 34 Desired professional skills versus the actual professional skills present in current manpower employed in Restaurants .....	119
Table 2. 35 Desired soft skills versus the actual soft skills present in current manpower employed in Restaurants .....	128
Table 3. 1 The number of accommodation units from the physical scan of ongoing study and the number of accommodation units from the Economic Census 2015 for locations and state/ UTs .....	145
Table 3. 2 All India Estimated Total Accommodation Units.....	149
Table 3. 3 Estimated Accommodation units state wise for India by categories .....	151
Table 3. 4 Rooms and number of accommodation units in 2017 for the 36 states and UTs that are being covered in the current study, as per Ministry of Tourism .....	153
Table 3. 5 Estimated Total of Rooms and Accommodation Units for categories of Accommodation .....	156
Table 3. 6 Estimated Rooms in accommodation units.....	158
Table 3. 7 Estimated manpower hired in different categories of Accommodation Units .....	159
Table 3. 8 Estimated manpower hired in different designations of Accommodation Units .....	159
Table 3. 9 Function Wise Estimated Manpower Employed in Accommodation Units .....	161
Table 3. 10 Estimated annual attrition in Accommodation Units.....	161
Table 3. 11 Estimated no. of rooms in accommodation units in future .....	163
Table 3. 12 Estimated Manpower in Accommodation Units in Future .....	165
Table 3. 13 Designation Wise Estimated Manpower Distribution for the years 2022 and 2025 .....	166
Table 3. 14 Training Level wise estimated manpower distribution in Accommodation Units in future years of 2022 and 2025.....	167
Table 3. 15 Estimated attrition (including retirement) level at future in Accommodation Establishments .....	168
Table 3. 16 The all India Estimated Total Restaurants (>=10 Seats).....	170
Table 3. 17 Estimated Total No. Of Dhabas/Restaurant (>=10 seats) in the 5 highways covered in Sample study.....	172
Table 3. 18 Estimated Total No. Of Dhabas/Restaurant (>=10 seats) in the National & State Highways	172
Table 3. 19 Estimated manpower in different categories of Restaurants .....	173
Table 3. 20 Estimated manpower in Dhabas/ Restaurants (>=10 seats)in National & State Highways at Present .....	173
Table 3. 21 Estimated manpower deployed in different designations of Restaurants .....	174
Table 3. 22 Level of Training of manpower presently employed in Estimated Restaurants .....	175
Table 3. 23 Estimated annual attrition (including retirement) in India in Restaurants .....	175
Table 3. 24 State Wise Population growth .....	176
Table 3. 25 Estimated Seats in Restaurants from 2018 to 2025 .....	178
Table 3. 26 Estimated Manpower for the year 2022 and 2025 .....	180
Table 3. 27 Designation wise estimated manpower in Restaurants for 2022 and 2025 .....	181
Table 3. 28 Level Wise estimated trained manpower for 2022 and 2025 in Restaurants.....	182

Table 3. 29 Estimated number of seats and manpower in Dhabas/Restaurants (>=10 seats) in National & State Highways for 2022 and 2025 .....	182
Table 3. 30 Estimated Attrition (including retirement) in different designations of Restaurants for 2022 and 2025 .....	183
Table 3. 31 The all India Estimated Total tour operators .....	185
Table 3. 32 Estimated manpower hired in Travel Agents and Tour Operators .....	188
Table 3. 33 Estimated manpower at present for different designations in Tour Operators .....	188
Table 3. 34 Estimated attrition (including retirement) in Travel Agents and Tour Operators at present .....	189
Table 3. 35 Growth Rate of Domestic and Foreign Tourists in India .....	190
Table 3. 36 Estimated Total Number of Tours Conducted from 2018 - 2025 (All India Level) .....	191
Table 3. 37 Estimated Manpower in Tour and Travel Operators for 2022 and 2025 .....	192
Table 3. 38 Designation Wise estimated manpower in Tour Operator for 2022 and 2025 .....	193
Table 3. 39 Designation wise attrition (including retirement) for Tour Operators for 2022 and 2025 ....	194
Table 3. 40 The all India Estimated Total wellness units .....	195
Table 3. 41 Estimated annual manpower hired in Spa and Wellness Units .....	197
Table 3. 42 Designation wise estimated manpower at present for Spa and Wellness Units .....	197
Table 3. 43 Estimated annual attrition in Spa and Wellness Units .....	198
Table 3. 44 Domestic and Foreign Tourist Growth Rate in India .....	198
Table 3. 45 Estimated Tourists visited in Spa and Wellness Units from 2019 to 2025 .....	200
Table 3. 46 Estimated manpower in Spa and Wellness Units for 2022 and 2025 .....	201
Table 3. 47 Estimated attrition (including retirement) in Spa and Wellness Units for 2022 and 2025 ....	202
Table 3. 48 The all India Estimated Total banquets .....	203
Table 3. 49 Estimated manpower in India for Outdoor Banquet at present .....	206
Table 3. 50 Estimated annual manpower hired in Banquet Halls by Designation .....	206
Table 3. 51 Estimated annual attrition in Banquet Halls .....	207
Table 3. 52 Domestic and Foreign Tourist Growth Rate in India .....	207
Table 3. 53 Estimated Clientele in Outdoor Banquets from 2018 to 2025 .....	208
Table 3. 54 Estimated Manpower in Outdoor Banquets for 2022 and 2025 .....	210
Table 3. 55 Estimated Manpower per designation in Outdoor Banquets for 2022 and 2025 .....	211
Table 3. 56 Estimated total attrition (including retirement) for Outdoor Banquets at 2022 and 2025 ...	211

Table 5. 1 Estimated Manpower Employed, Attrition and Requirement by Category of Establishment at present level .....	216
Table 5. 2 Estimated manpower employed at present considering different level of training .....	216
Table 5. 3 Estimated Attrition (including retirement) at present considering different level of training .....	217
Table 5. 4 Estimated Manpower (including attrition) at present considering different level of training .....	217
Table 5. 5 Estimated Manpower Employed, Attrition and Requirement by Category of Establishment at 2022 .....	218
Table 5. 6 Estimated manpower employed at 2022 considering different level of training .....	218
Table 5. 7 Estimated Attrition (including retirement) at 2022 considering different level of training ....	219
Table 5. 8 Estimated Manpower (including attrition) at 2022 considering different level of training .....	219

Table 5. 9 Estimated Manpower Employed, Attrition and Requirement by Category of Establishment at 2025 .....	220
Table 5. 10 Estimated manpower employed at 2025 considering different level of training .....	220
Table 5. 11 Estimated Attrition (including retirement) at 2025 considering different level of training ..	221
Table 5. 12 Estimated Manpower (including attrition) at 2025 considering different level of training...	221
Table 5. 13 Estimated Manpower Gap considering all categories of Hospitality Establishments at present level.....	222
Table 5. 14 Estimated manpower gap considering Hotels, Restaurants and Tour Operators at present level.....	222
Table 5. 15 Estimated manpower gap considering Hotels and Restaurants at present level .....	223
Table 5. 16 Estimated Manpower gap between formally trained employees in all categories of establishments and trained manpower from Hospitality Institute at present level .....	223
Table 5. 17 Estimated Manpower gap between formally trained employees in Hotels, Restaurants and Tour Operators and trained manpower from Hospitality Institute at present level .....	224
Table 5. 18 Estimated Manpower gap between formally trained employees in Hotels and Restaurants and trained manpower from Hospitality Institute at present level.....	224
Table 5. 19 Estimated Manpower gap between formally trained employees in Hotels and trained manpower from Hospitality Institute at present level .....	224
Table 5. 20 Estimated Manpower Gap considering all categories of Hospitality Establishments at 2022 .....	225
Table 5. 21 Estimated Manpower gap between formally trained employees in all categories of establishments and trained manpower from Hospitality Institute at 2022 .....	225
Table 5. 22 Estimated Manpower gap between formally trained employees in Hotels, Restaurants and Tour Operators and trained manpower from Hospitality Institute at 2022.....	226
Table 5. 23 Estimated Manpower gap between formally trained employees in Hotels and Restaurants and trained manpower from Hospitality Institute at 2022 .....	226
Table 5. 24 Estimated Manpower gap between formally trained employees in Hotels and trained manpower from Hospitality Institute at 2022 .....	227
Table 5. 25 Estimated Manpower Gap considering all categories of Hospitality Establishments at 2025 .....	227
Table 5. 26 Estimated manpower gap considering Hotels, Restaurants and Tour Operators at 2025 ....	227
Table 5. 27 Estimated manpower gap considering Hotels and Restaurants at 2025 .....	228
Table 5. 28 Estimated Manpower gap between formally trained employees in all categories of establishments and trained manpower from Hospitality Institute at 2025 .....	228
Table 5. 29 Estimated Manpower gap between formally trained employees in Hotels, Restaurants and Tour Operators and trained manpower from Hospitality Institute at 2025.....	229
Table 5. 30 Estimated Manpower gap between formally trained employees in Hotels and Restaurants and trained manpower from Hospitality Institute at 2025 .....	229
Table 5. 31 Estimated Manpower gap between formally trained employees in Hotels and trained manpower from Hospitality Institute at 2025 .....	230
Table 5. 32 Manpower employed in Hospitality Establishments who are trained on the job or Untrained at present level, at 2022 and at 2025 .....	230

# Executive Summary



## E.1 Background & Methodology

- The objective of this study was to:
  - To understand the current level of infrastructure and employment in hospitality sector
  - Estimate the future infrastructure and manpower requirement in the hospitality sector
  - Formulate policy to close skill gap between demand & supply
- Total covered areas were 66 locations in India over the 33 states/UTs for the 6 zones, namely North, South, East, West, Central and North-East.
- Total Sample Achieved in our coverage is 8016 for Accommodation Units, 10418 for Restaurants, 206 for Spa and Wellness Units, 495 for Medical Units, 1998 for Tour Operators and Travel Agents, 189 for Banquet Halls, 28 for e-Portals and Mobile Catering Units such as Taj SATS, Rozzana, FNB India Catering Satyam Caterers Pvt. Ltd., J.Oberoi Caterers Ambassador's ,Sky Chef (SKY Gourmet),Oberoi Flight Catering Services, Four Seasons Hospitality Pvt. Ltd., Casino Air Caterers and Flight Services (CAFS) Saj Flight Services Pvt Ltd. Total Hospitality Institutes were 100.
  
- The Sampling comprised of the following steps and activities: -
  
- **Step 1: Preparation of database:**
  - **Activity 1: First Level Database Preparation:** The database started with Economic Census 2015. Based on the activity codes of the different earmarked economic activities at the State level were identified. Next pin codes of the different identified towns within the State (as in the TOR document and Inception report) were used to identify the individual units within those towns. Thus, first level of database for 66 locations was prepared.
  - **Activity 2: Second Level Database Preparation:** Next, various online sources<sup>1</sup> were scouted in order to add to the units identified in Activity 1. Duplications were removed in order to arrive at a clean database for the subsequent stage.
  
- **Step 2: Refining comprehensive database into a usable database:** Scanning of each of the identified towns to demarcate **High - Density, Medium - Density** and **Low-Density** Zones based on secondary scanning and observation by local field team of Nielsen. This had the following activities:
  - **Activity 1: Physical Verification:** - Physical visit to the high, medium and low-density zones by the field team specifically to the authorities like Municipalities and Police Stations to check the no. of Operational units (accommodation, restaurants, homestays,

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<sup>1</sup> Some sources we referred to ([www.data.gov.in](http://www.data.gov.in), FHRAI Database, NRAI Database, Online Databases like [www.Indiamart.com](http://www.Indiamart.com), [www.justdial.com](http://www.justdial.com), [www.oyorooms.com](http://www.oyorooms.com), [www.airbnb.co.in](http://www.airbnb.co.in), [www.makemytrip.com](http://www.makemytrip.com) etc.

wellness units, banquets etc.). This was then matched with the Activity 2 of Step 1. Any mismatch observed in this process was documented and appended in the main database.

- **Activity 2: Earmarking Zones:**
- **Activity 3: Ensuring Comprehensive Coverage:** The projection factor was 50% for Medium - Density Zones and 75% for Low - Density Zones for each of the 66 earmarked cities.
- **Activity 4: Allocation of Sample Size:** The total no. of units to be sampled (as given in the TOR) was then apportioned to each of the cities based on the universe no. collected in the steps indicated above. A minimum of 30 samples for each category of responding units were ensured. Thus, if there was a shortfall in sample for a location, it was compensated by a sample allocation from another geography which had a relatively higher sample size. Thus, a distribution of sample by earmarked cities was arrived at. 10% of extra sample was kept for any exigencies like rejection to respond to the queries etc.
- **Step 3: Sample Selection** – after apportioning the sample to be covered, for each category of hospitality establishments, amongst the 66 locations proportionate to the distribution of total number of hospitality units (by categories) obtained from secondary database and physical scanning, the sample to be covered amongst the different categories of establishments
  - Accommodation units
    - After the total sample of 8000 (target sample for accommodation establishments) was proportionately distributed amongst the 66 locations (as per proportion observed in the physical scanning database of 66 locations), for each location, the allotted sample was further proportionately distributed amongst sub categories of hospitality establishments, which is to hotels, homestays and houseboat accommodations.
    - Within the sub-category of hotel, the sample was further proportionately distributed to categories of hotel accommodations – 5 star deluxe, 5 star, heritage, 4 star, 1+2+3 star, classified, non-star, guest house, Bed & breakfast, youth hostel, Gurudwaras, etc.). Then the sample units to be interviewed were selected by Probability Proportional to Size sampling method (PPS sampling)
  - Restaurants (>=10 seats)
    - After the total sample of 10000 (target sample for restaurant establishments) was proportionately distributed amongst the 66 locations (as per proportion observed in the physical scanning database of 66 locations), for each location, the allotted sample was further proportionately distributed amongst sub categories of restaurant establishments, which is to restaurants and sweetshops.
    - Within the sub-category of restaurants and sweetshops each, the sample was further distributed proportionately amongst the high density, medium density and low density areas of the location (present in the physical scanning cum secondary database used for sample allocation). Then the sample units to be



- interviewed were selected by Probability Proportional to Size sampling method (PPS sampling)
- An extra sample of around 10% was selected for interviews anticipating refusals for face-to-face interview for information
  - A sample of highway motels/ dhabas/ restaurants (with more than 10 seats) was also interviewed after random selection.
  - Travel Agents & tour Operators, Wellness, spa & medical units and Outdoor Banquet halls
    - After the total target sample was proportionately distributed amongst the 66 locations (as per proportion observed in the physical scanning database of 66 locations), for each location, the allotted sample was further proportionately distributed amongst the high density, medium density and low density areas of the location (present in the physical scanning cum secondary database used for sample allocation). Then the sample units to be interviewed were selected by Probability Proportional to Size sampling method (PPS sampling)
    - An extra sample of around 10% was selected for interviews anticipating refusals for face-to-face interview for information
  - Hotel Management Institutes
    - Out of 100 institutes to be covered for face to face primary interview, all 21 IHMs were selected for face to face primary interview
    - The remaining 79 sample to be covered was proportionately distributed amongst the 66 locations (as per proportion observed in the physical scanning database of 66 locations),

## **E.2 Study Findings – Accommodation**

- From the Sample data covered under study , the zonal distribution of number of accommodation units were 27.17% for North, 12.03% for East, 25.02% for West, 22.93% for South, 8.47% for Central and 4.38% for North-East
- The manpower deployment across all categories in accommodation units is 1, 23,599 for “On the roll” and 54, 876 for Contractual/Third Party employment.
- The number of rooms available in accommodation units covered in the sample is 51287 in North, 19300 in East, 45321 in West, 57769 in South, 15449 in Central and 8884 in North East.
- At present at All India level, the total estimated number of accommodation units is 102917, total no. of estimated rooms are 25. 42lacs, the total estimated manpower is 22. 91 lacs and the total estimated attrition is 118645.
- In 2022 the estimations at All India level are - total no. of estimated rooms – 38. 46 lacs, the total estimated manpower shall be 33.99 lacs and the total estimated attrition is 176036.
- In 2025 the estimations at All India level, total no. of estimated rooms are 55.20 lacs, the total estimated manpower is 48. 19 lacs and the total estimated attrition is 249562.

- As regards the other major objective of the study in terms of skill gap in this segment of the hospitality industry. The major Professional Skills which we found during the study across different functions of the hotel industry were as under:
  - In F&B Kitchen the requirement of Hotel Management and Catering Technology course, with the exception of Assistant Staffs, where the actual availability is more than the desired.
  - For F&B Service and Front Office category, the most required skills were Hotel Management and Catering Technology and B.Sc. Hotel Management Course.
  - For Housekeeping category, there is demand for Hotel Management and Catering Technology courses, especially for Managers and Executives. But skills such as Graduate, Post Graduate, Class 12 and Class 10 pass outs are readily available.
  - For HR/Administration/Accounts/Purchase, there is a demand of Diploma Course in Travel and Tourism, while having readily available Graduates.
  - For Other Ancillaries such as Gardening and Plumbers, the demand is mainly for Graduates.
  
- As regards the soft skills required by the industry and what is currently available in the market is as under
  - For F&B Kitchen Department, the most demanded skills are Problem Solving, Customer Service and Leadership, while skills such as Multitasking and Behavioural Skill is mostly available.
  - In case of F&B Service, there is high requirement of Customer Service and Foreign Language while Communication skill is available to some extent and that too in premium category of hotels which is a huge gap in case of other category of hotels.
  - For Housekeeping/Front Office, Leadership and Multitasking are in demand.
  - For HR/Administration/Accounts/Purchase, the skills in demand are Team Work, Behavioural Skill and Interpersonal Relationship, Currently Leadership skill is vastly available.
  - For Other Ancillaries, Multitasking and Foreign Language skill is more in demand while skills such as Problem Solving and Stress Management are some other skills which are also required by the industry which is currently not available.

### E.3 Study Findings – Restaurants

- For the sample location under study, the zonal distribution of number of restaurants were 29.14% for North, 8.5% for East, 34.03% for West, 17.6% for West, 8.1% for Central and 2.5% for North-East – all with 10 seats or more.
- Fast food units had the highest representation amongst the sampled geography.
- The total seats across the sample restaurants covered sample were - 313903
- Seats available in restaurants were 87,993 in North, 19,128 in East, 1, 35,362 in West, 39,804 in South, 24,331 in Central and 7285 in North East. Fast food units have higher than average presence in West and North East Zones.
- Standalone Restaurants and Sweet shops have higher no. of seats in North, Central and North East Zones.
- The manpower deployment across all categories in restaurants is 95,757 for “On the roll” and 23,962 for Contractual/Third Party at present for the sample restaurants covered.
- At present at All India level the total estimated no. of restaurants is 1,34,124, total no. of estimated seats is 43.41 lacs, the total estimated manpower employed is 16.55 lacs and the total estimated attrition is 112480.
- In 2022 the future estimates at All India level, the total estimated no. of seats shall be 46.54 lacs, total estimated manpower is 17.74 lacs and total estimated attrition is 120549.
- In 2025 the future estimates at All India level , the total estimated no. of seats shall be 49.06 lacs, total estimated manpower shall be 18.69 lacs and total estimated attrition is 127030.
- For Dhabas/Motels on Highways, the estimated total no. of seats at present is 122.72 lacs and the estimated manpower at present is 36.08 lacs.
- For Dhabas/Motels on Highways, the estimated total no. of seats in 2022 shall be 136. 56 lacs and the estimated manpower shall be 40.14 lacs
- For Dhabas/Motels on Highways, the estimated total no. of seats in 2025 shall be 149.45 lacs and the estimated manpower shall be 43.94 lacs.
- As regards the other major objective of the study in terms of skill gap in this segment of the hospitality industry. The major Professional Skills which we found during the study across different functions of the hotel industry were as under:
  - For F&B Kitchen, the professional skill most in demand is Hotel Management and Catering Technology, while skills such as Graduate, Post Graduate and Class 10 pass outs is easily available.
  - For F&B Service, courses of Hotel Management and Catering Technology and B.Sc. Hotel Management are in demand while Degree Course in Travel and Tourism and MBA/CA/CS/ICWA are easily available.
  - For Housekeeping department, Graduates are the most in demand while skills such as MBA/CA/CS/ICWA and Degree Course in Travel and Tourism are actually available.
  - For Administration, the courses which are mostly desired is MBA/CA/CS/ICWA and Graduates.

- For Other Ancillaries, Graduates, Class 12 and Class 10 Pass outs are the most desired Professional Skills.
- As regards the soft skills required by the industry and what is currently available in the market is as under
  - In F&B Kitchen, the soft skill mostly desired is Leadership and Problem Solving while skills such as Communication are mostly available.
  - In F&B Service, Multitasking and Appropriateness are mostly desired while skills such as Communication are available to some extent.
  - For Housekeeping department, Problem Solving and Communication are the most desired skills and Customer Service.
  - For Administration, Multitasking is the most desired skill while Leadership skills are mostly available.
  - For Other Ancillaries, Time Management and Proficiency is the most desired skill.

#### **E.4 Study Findings – Tour Operators and Travel Agents**

- For the sample data under study, the total tour operators of different category covered were 1998.
- The zonal distribution of number of Tour operator were 30% for North, 7% for East, 13% for West, 16% for West, 18% for Central and 15% for North-East.
- West, South, Central and North east had majority of Travel agents. The Transport Operators were more in North and East. Majority of Travel E com Sites were situated in the West.
- North and East Zone witnesses a lot of travel operators who concentrate more on the mixed business methods. Concentration of Travel agents with Adventure tourism profile exists predominantly in the North, West and North East zones.
- The manpower deployment over all categories in Tour operator segment is 14,152 for “On the roll” and 4040 for Contractual/Third Party for the sample covered.
- Ticketing and Tours have the maximum deployment of manpower. This is followed by Operations in addition to Sales and Marketing, which is followed by Services. Accounting is the main support function with Foreign exchange and IT following suit.
- At present for All India, the total estimated no. of Tour Operators is 13,378, the total estimated manpower employed is 1.26 lacs and the total estimated attrition is 15771.
- In 2022 at All India level, the total estimated manpower shall be 1.80 lacs and total estimated attrition is 22674.
- In 2025 at All India level, the total estimated manpower shall be 2.55 lacs and total estimated attrition is 32130.

### **E.5 Study Findings – Outdoor Banquets**

- For the sample locations under study, the zonal distribution of number of outdoor Banquets were 29.3% for North, 22.4% for East, 19.5% for West, 28.7% for West, 8.6% for Central. North and South have recorded the highest representation followed by East, West and Central Zones respectively.
- The manpower deployment over all categories in Banquets is 1253 for “On the roll” and 294 for Contractual/Third Party for the 189 banquets covered.
- At present for All India, the total estimated no. of estimated Outdoor Banquets is 7805, the total estimated manpower employed is 63,885 and the total estimated attrition is 4460.
- For 2022 at All India level, the total estimated manpower shall be 89,894 and total estimated attrition is 6276.
- For 2025 at All India level, the total estimated manpower shall be 1,21,413 and total estimated attrition is 8476.

### **E.6 Study Findings – Spa and Wellness Units**

- For the sample locations under study, the zonal distribution of number of Spa and wellness units were 32% for North, 8.3% for East, 27.2% for West, 22.8% for West, 2.4% for Central and 7.3% for North-East.
- The manpower deployment over all categories in Spa and wellness units is 637 for “On the roll” and 435 for Contractual/Third Party. Physiotherapists rule the roost in both “On the roll” and Contractual/Third Party avatars in the SPA’s/ wellness units. This is followed by Beauticians, Managers etc.
- At present for All India, the total estimated no. of estimated Spa/ wellness units is 14,432, the total estimated manpower employed is 63,893 and the total estimated attrition is 5543.
- At future level (2022) for All India, the total estimated manpower shall be 85,155 and total estimated attrition is 7388.
- At future level (2025) for All India, the total estimated manpower shall be 1,10,011 and total estimated attrition is 9544.

### E.7 Study Findings – Hospitality Institutes

- B.Sc. in Hotel management is the most sought after course. Other courses picking up slowly in popularity are Diploma Course in Travel and Tourism Management and Diploma in Food Production.
- Non-Teaching staff form the bulk of the manpower. Contractual/Third Party recruitment takes place predominantly role of assistant professors.
- Most common reasons for perceived skill gap are lack of communication, practical application and outdated syllabus. These issues have to be addressed to mitigate the skill gap.
- There has been 17% growth rate in number of students being enrolled in different courses over all institutes over the last 3 academic years.
- Diploma course in Travel and Tourism and Diploma in Food production course has seen the maximum development in terms of enrolment, with a 65% and 51% increase, respectively, over the last 3 academic years.
- There has also been a 15% increase in number of students who have passed out during the same period.
- Here also Diploma course in Travel and Tourism and Diploma in Food production lead the way with 71% and 47%, respectively, increase in pass out over the last 3 years.
- Major barriers for hospitality institutes include inadequate teaching staff and difficulty in getting affiliation from government.
- Most needed professional skills include being proficient in technology and knowledge of foreign language.
- The estimated supply of manpower at present at the All India level by the various institutes is 65,879
- The estimated supply of manpower at future level (2022) at All India is estimated to be 84,128.
- The estimated supply of manpower in 2025 at All India level by various existing institutes is estimated to be 1, 27,941.

### E.8 Demand – Supply Gap

- The estimated total employment for 2018 (at present), estimated total employment for 2022 and estimated total employment for 2025 is presented below.

All Categories of Hospitality Establishment	Estimated Manpower Employed	Estimated Attrition (including Retirement)	Estimated Manpower Requirement (including Attrition)
<b>2018 – at present</b>	78,08,555	2,56,898	80,65,453
<b>Estimated for 2022</b>	95,44,738	3,32,921	98,77,659
<b>Estimated for 2025</b>	115,71,017	4,26,742	119,97,759

- The estimated demand-supply gap for 2018 is 26 lakhs, for 2022 is 8 Lakhs and for 2025 is 10.94 Lakhs.

S. No.	Segments	2018	2022	2025
a	Total Employment	78,08,555	95,44,738	1,15,71,017
b	Additional Annual Manpower Requirement (current year employment minus previous year employment)*	23,39,555	5,45,566	7,62,245
c	Estimated Annual Attrition	2,56,898	3,32,921	4,26,742
d	Annual Demand for Manpower (b+c)	25,96,453	8,78,487	11,88,987
e	Trainers required (36 students are trained by 1 teacher/ trainer - from Sample study)	72,124	24,402	33,027
f	<b>Total Annual Demand</b>	<b>26,68,577</b>	<b>9,02,890</b>	<b>12,22,015</b>
g	<b>Total Supply (including attrition)</b>	<b>65,879</b>	<b>84,128</b>	<b>1,27,941</b>
h	<b>Demand Supply Gap (f-g)</b>	<b>26,02,698</b>	<b>8,18,762</b>	<b>10,94,074</b>

\* For 2018, the data of total employment in 2016-17 at 54.69 lakhs, from Market Pulse Report on "Study to Assess the Requirement of Manpower in Hospitality and Travel Trade Sector is used.

- Consolidation taking place in the premium category of hotels, international chains entering, realignment of brands under the chain groups.
- Focus more on facilities and amenities
- The average staff strength of 1.84 persons / rooms coming down to 1.45 /room.
- Ratio of permanent staff ( "On the roll" ) to temporary ( contractual /off the roll) on the rise in premium range of hotels even across functions such as house- keeping and front office and other ancillary.
- In case of unclassified accommodation units as well as guest houses the ratio of contract to "On the roll" staff is high except for F&B Kitchen.
- The other important aspect as highlighted by the industry was non availability of trained manpower – theoretical knowledge is fine but lack practical training even from premium IHM.
- Due to low entry level scales even in premium chain groups especially for functions such as F& B service, front office, and house - keeping there is lot of attrition. Hence instead of hiring from premium institutes the industry normally inducts from lower level institutes, provides them with in house training capsule and appoints them.
- Still there exists a gap as nearly 22% to 25% of the students pursuing the course drop half way or choose a different profession
- The other important aspect in this industry is chef – multi-cuisine restaurant offering 4 to 5 types of cuisine, the main chef, are available but the support team is not consistent.

### E.9 Way Forward

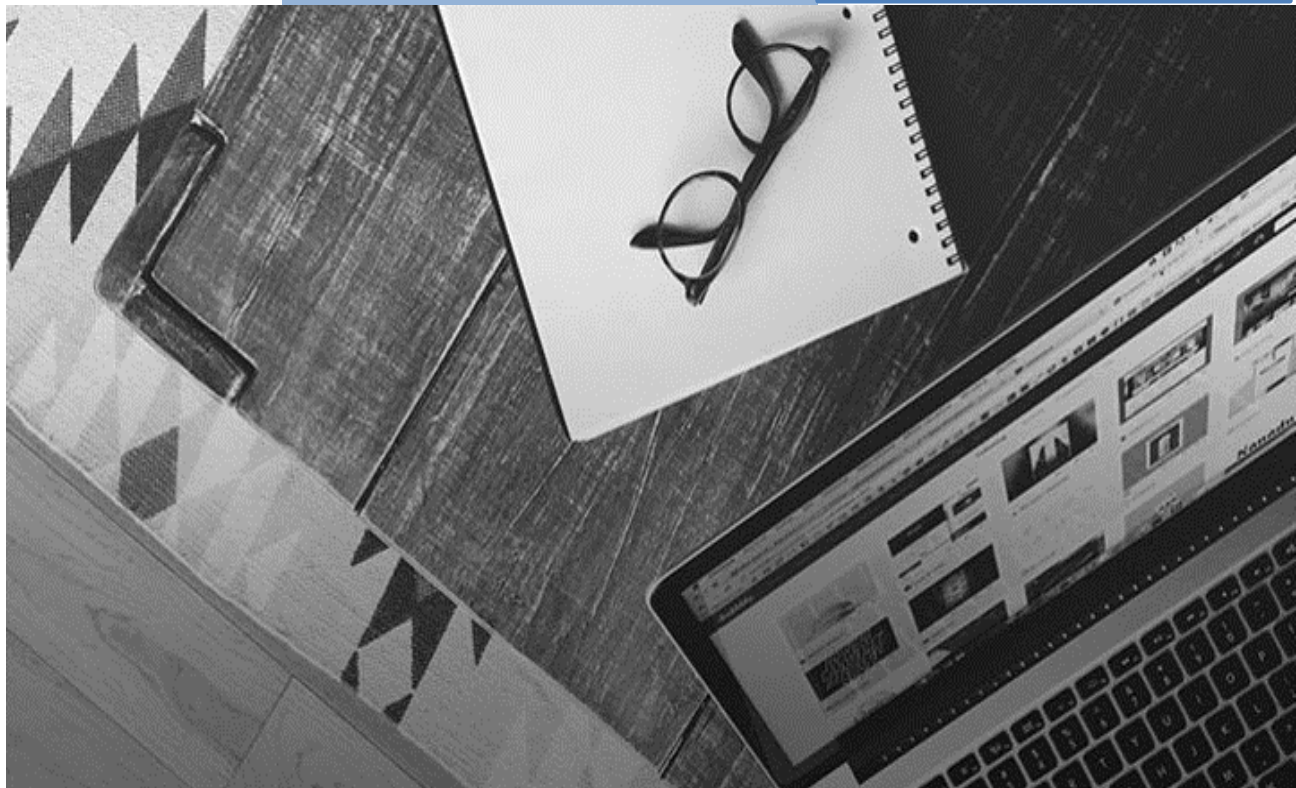
- To mitigate the huge gaps (both in current and future level) in formally trained manpower, it is required for the Ministry of Tourism, Government of India to introduce new courses which are short term but train the students with specific required skills. These courses should be segregated by the target placement establishment types and by the functional domains. For example, a course may be introduced which solely trains students for housekeeping responsibilities that are present in accommodation units.
- The Ministry of Tourism, Government of India may seek the help of leading luminaries in each and every hospitality establishment segment to design such short term but focused courses.
- Another way is to increase the seats in the existing courses. At present many star categories and classified category of accommodation and restaurant units are training their new recruits in their own establishments to suit their specific requirements.
- The Government of India may look in to avenues which will skill students in similar manner. The Government of India may also look in to the prospects of incentivising hospitality establishments for skilling and inducting manpower to plug the estimated gaps in future and current level.
- It is also reported by the hospitality establishments and institutes surveyed that the attrition rate being too high in the industry and there are many employee drop outs due to the demanding work schedules and responsibilities combined with relatively lower salary structure than the market estimates. The Government may look in to this so that the attrition level is lowered down.
- The major bottleneck which still exists in the overall industry is lack of soft skills – aptitude and attitude, communication, grooming (dressing, personal hygiene, and posture), language.
- There exists a shortage of skilled manpower across the 2 major segment of the industry – Hotels & Restaurants.- there is lack of information, false information is provided to students – need for creating awareness- to remove negative picture of the Industry – Youth not coming forward .



## Section 1

# Introduction

This section sets the context of the entire study indicating the Background, Objective, Scope of Work and Methodology undertaken in executing the study.



## 1. Introduction

This section highlights the basic tenets on the basis of which the study was commissioned by Ministry of Tourism and executed by Nielsen. It sets up the context, delves on the objectives and earmarked scope of work, highlights deliverables and finally zeroes down upon the approach and methodology adopted to carry out the study and estimation procedure adopted to arrive at the final deliverables.

### 1.1 Background

Economic development of a country is dependent upon a multitude of indicators, with tourism being one of the major determinants in this regard. A positive correlation exists between bountiful nature, historical marvels and locations of religious prominence a country has to offer. While tourists are always enchanted by the aforesaid attractions, the major driver for them to visit the locations are a combination of support services like available infrastructure, appropriately trained human resources, financing mechanism and most importantly the planned outreach. These factors not only attract, grow and sustain tourist flow but also contribute immensely to the growth over the years. The international tourist arrivals worldwide are expected to increase by 3.3% per year up to 2030, to reach 1.8 billion arrivals, as per UNWTO estimates. The sheer scale of this industry contributes directly to the economy by the way that serves as a principal source to generate income, employment, private sector growth and infrastructure development in a nation blessed with bounties of nature. Due to these advantages, tourist development doesn't only stimulate the growth of the industry, but also induces the overall economic growth as well<sup>2</sup>. The major benefits travel, and tourism offers economy of an emerging and a developing state can be summed up as depicted in the pictogram below: -

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<sup>2</sup> Shradha Sheth & Pragyashree Dubey : Oakbrook Business Review : A study on Skill Gap Analysis in Hospitality and Tourism Sector

Figure 1.1 Tourism sector and economy link



In recognition of the contribution of tourism to the economic development of a State, the United Nations had declared 2017 as the “International Year of Sustainable Tourism for Development”, thus, giving an impetus to advance the contribution of the tourism sector to the three formative pillars of sustainability – those of economic, social and environmental.

In the Indian context, tourism sector makes a significant impact on the economy of our country. World Travel and Tourism Council Report 2018 reveals that the travel and tourism sector contributed INR 5943 bn (USD 91.3 bn) which is 3.7% of the total GDP in 2017 with a forecast of y-o-y growth of 7.6% for 2018.

Table 1.1 India’s relative position current and future as per WTTC estimates

Parameters	India’s Rank amongst 185 countries	
	2017	2018
Relative importance of Travel & Tourism’s absolute contribution to GDP	7	7
Relative Size contribution to GDP	97	99
Growth Forecast for the successive year	30	6
Long Term Growth Forecast	8	4

Source: WTTC India Report 2017, 2018

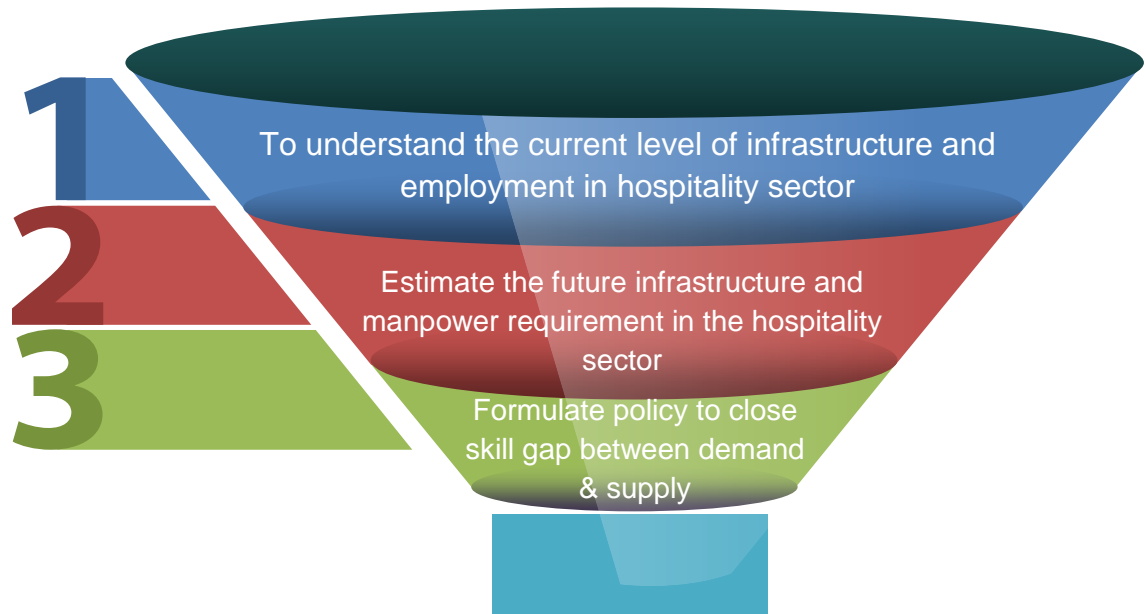
As depicted in the table above, though Tourism’s contribution to the Indian GDP has remained more or less consistent in absolute and relative terms, the country showcases a very positive upward movement in terms of the growth forecasts, be it for the successive year ( a huge leap of 24 ranks) or in terms of long term aspects (a leap of 4 ranks).

As per WTTC estimates, Travel & Tourism in India has generated 26,148,000 jobs directly in 2017 (5.0% of total employment) and is forecasted to grow by 2.8% in 2018 to 26,883,000 (excluding commuter services). By 2028, Travel & Tourism will account for 33,195,000 jobs directly, an increase of 2.1% per annum over the next ten years. The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts was 41,622,500 jobs in 2017 (8% of total employment), which was estimated to rise by 3.1% in 2018 to 42,898,000 jobs (8.1% of total employment). By 2028, Travel & Tourism is forecast to support 52,279,000 jobs (8.4% of total employment), an increase of 2.0% pa over the period.

## 1.2 Objective

The 3-fold objective of the assignment has been stated in the figure below:

**Figure 1.2 Objectives of the Study**



### 1.3 Scope of Work

The detailed scope of work as provided in the RFP is as follows:-

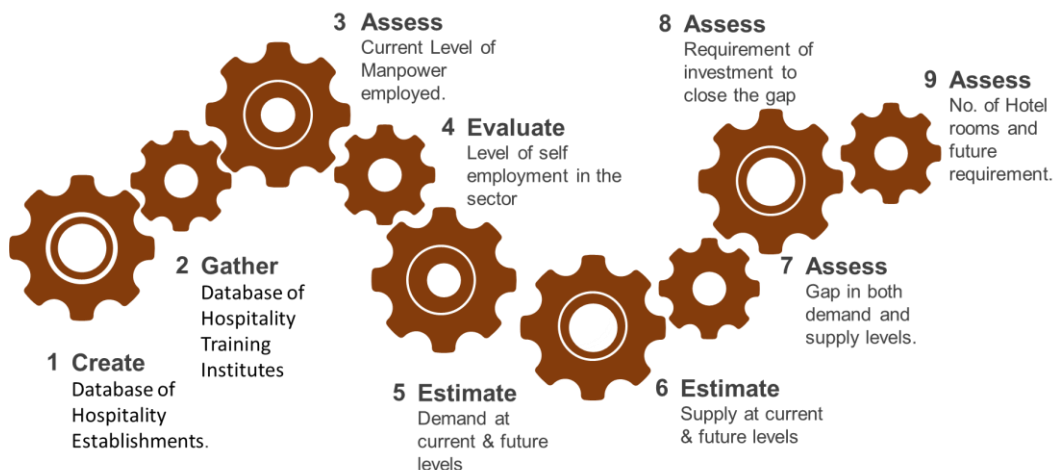
#### 1.3.1 Key Deliverables

The study has a few key deliverables along with a few secondary ones. The same has been depicted in the paragraph and elaborated in the diagram below.

- Database of Hospitality Establishments
- Database of Hospitality Training Institutes
- Current levels of manpower employed
- Level of self-employment in the Hospitality & allied Sectors
- (Annual) Demand / Workforce requirement (taking into consideration trend, attrition and retirements). (Present and Future levels both)
- (Annual) Supply of manpower (as per the existing/ already planned human resource development infrastructure and supply side attrition). (Present and Future levels both)
- Assessment of gap between the annual requirement and the annual availability of the trained persons on the basis of the demand – supply position. (Present and Future levels both)
- Assessment of investment required to bridge the skill gap in each of the subsector
- Assessment of Hotel rooms and their future requirement.

Every deliverable would be assessed for each sub – sector separately with its de-segregation into functional domain x level of operation x level of training.

**Figure 1. 3 Key Deliverables of the Study**

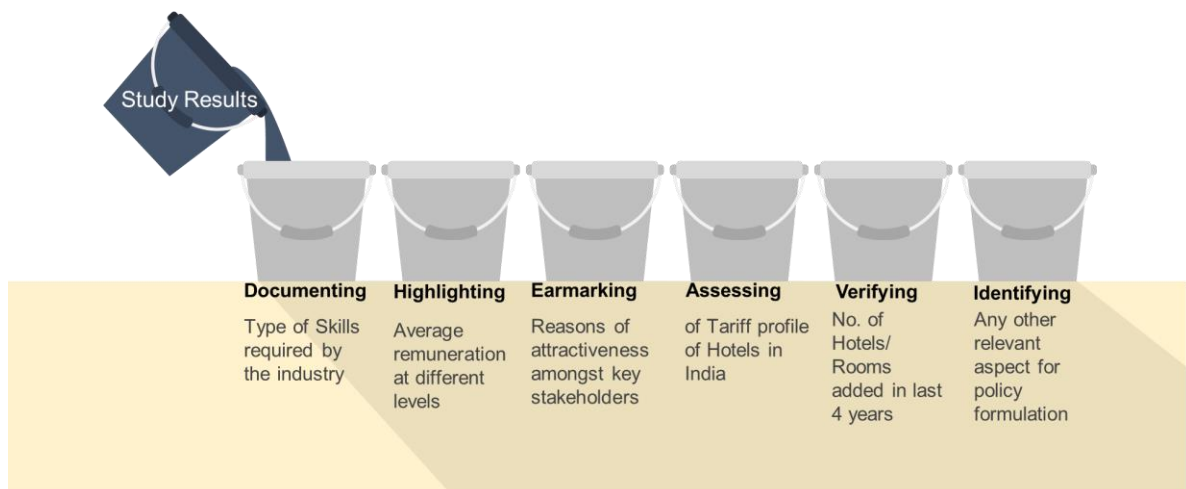


### 1.3.2 Other Deliverables

The study also aims at collecting a few key other deliverables along with the major objectives elucidated above. The same has been depicted in the paragraph and elaborated in the diagram below. Other aspects to be assessed would include documenting.

- Type of skills required by the Industry
- Average remuneration at different levels
- The reason for attractiveness amongst students / employees towards different sub sectors of Hospitality and allied sectors.
- Assessment of tariff profile of Hotels in India (city – wise, covering different tariff slabs (in particular above Rs. 7500/-))
- Numbers of Hotels / Hotel Rooms added in the last 4 years 2014 onwards
- Any other important relevant aspects related to policy formulation

**Figure 1. 4** Other Deliverables of the Study



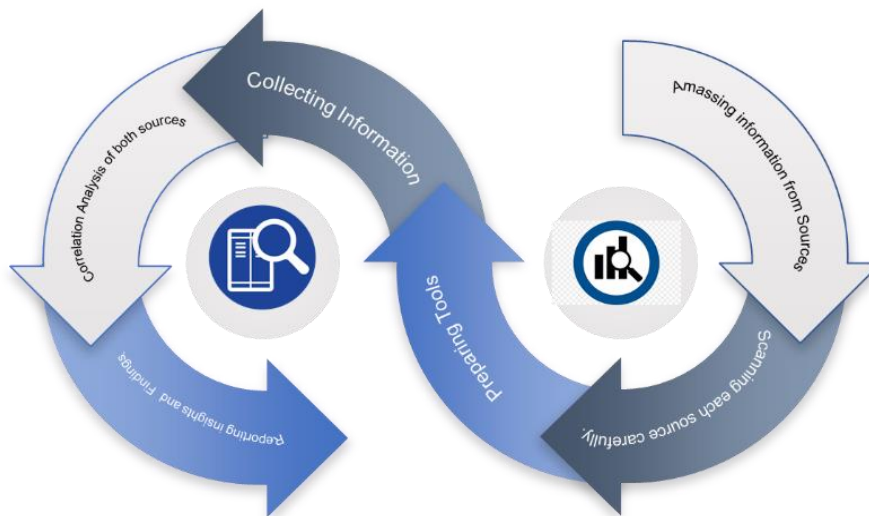
## 1.4 Approach & Methodology

This section deals with the approach and methodology of undertaken in executing this assignment starting from the conceptualization, rationalization behind the same and on ground execution.

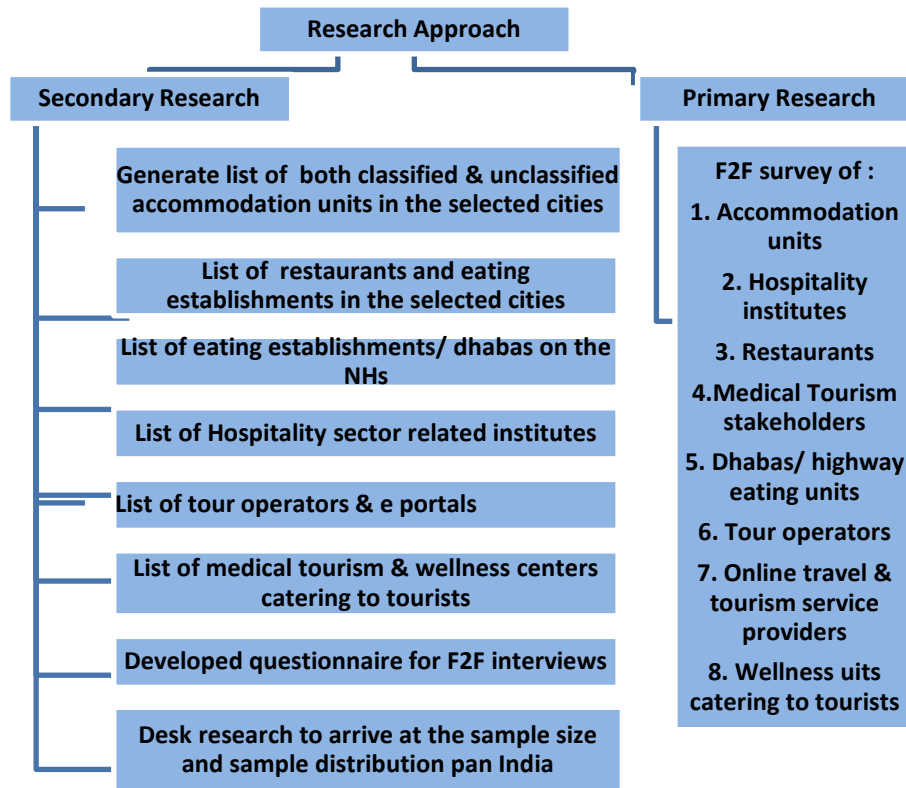
### 1.4.1 Research Approach

In order to meet the study objectives, the research was conducted with a blend of both primary as well as secondary research. Primary research was the major approach to conducting the study although secondary research was used in preparing the best possible database of hospitality sector related establishments /institutions and in framing the right questionnaires during the primary face to face survey. A multistage quantitative survey technique will be used to select the sample. The selection procedure is explained in the following diagrams:

**Figure 1. 5** Approach for the Study



**Figure 1.6** Detailed activities under each approach



Data base prepared during desk research was used to select required sample of each category of establishments. The research tools, data collection and analysis plan was submitted to Ministry of Tourism and proper approval was taken prior to the launch of the primary survey.

### 1.4.2 Preparatory Phase

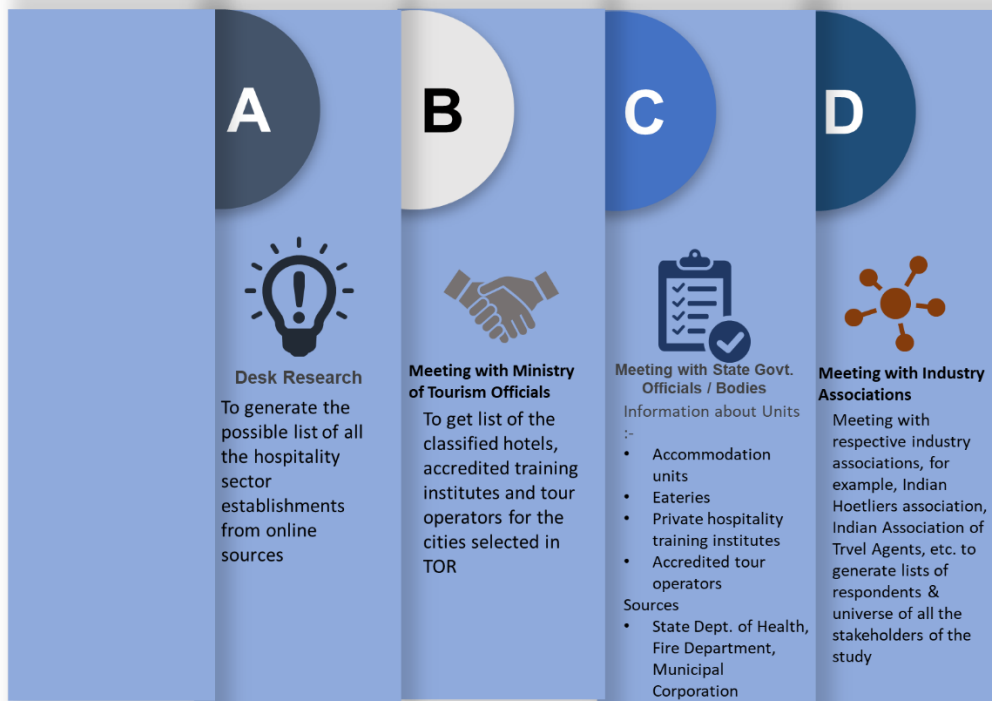
Following the approval of Inception report, which comprised of the methodological overview in addition to tools to be administered, the following aspects were finalized.



### 1.4.2.1 Finalization of list of establishments

The following procedure was followed in finalizing the list of establishments to be surveyed at the subsequent stage. The details have been dealt in with in the ensuing section.

**Figure 1.7** Detailed activities under each approach



### 1.4.2.2 Information areas

The information areas of the study were specific due to the explicit nature of the deliverable, but the type of respondents being geographically dispersed and voluminous in terms of quantity, it was more important to extract the exact information required in order to complete the study. In accordance with the laid down objectives and the deliverables, the identified information areas to be collated from different respondent categories of the study were as follows: -

**Figure 1. 8** Information sought from different respondent groups



### 1.4.2.3 Segment coverage

The Segment coverage, as depicted above, had considerable spread in terms of type of respondents and their geographical spread. The objective of choosing such a widespread group was to tap each of the categories falling within the wider ambit of hospitality and allied sector and not leave any category untouched.

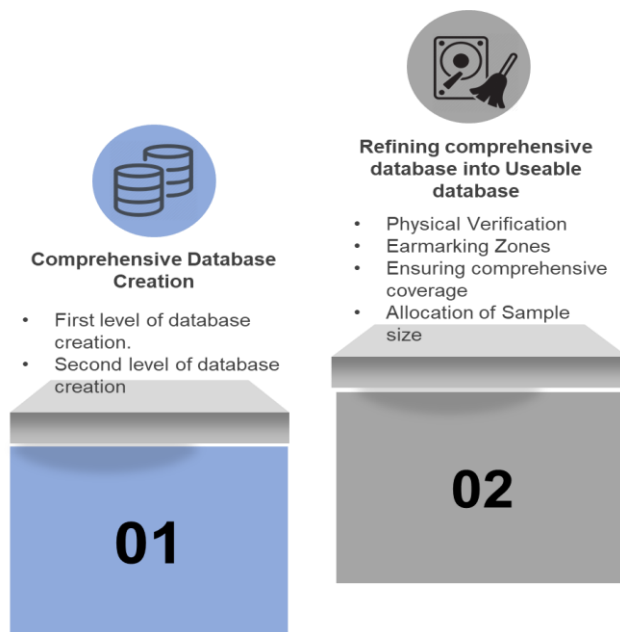
Figure 1. 9 Segment coverage

<b>Accommodation Units</b>	<b>Classified</b>	Heritage/ Legacy, 5 Star/ 5 Star Deluxe, 4 Star, 1,2,3 Star, Guest Houses, Bed & Breakfast, Time Share Resorts
	<b>Unclassified</b>	Guest Houses & Motels, Bed & Breakfast/ Home stay Units, Youth Hostels, Cruise, Floating Accommodations, Others
<b>Restaurants</b>	Classified Restaurants	
	Standalone Restaurants/ Sweet shops having a seating capacity of 10 or more	
	Fast Food Units	
	Motels & Restaurants on Highways	
<b>Wellness Units</b>		
<b>Medical Units catering to foreign tourists</b>		
<b>Tour Operators &amp; Travel Agencies</b>	Domestic	
	Inbound	
	Adventure	
	Medical	
	Tourist Transport Operator	
	Others	
<b>E Portals</b>	Hotel	
	Travel	
	Food	
<b>Mobile Catering Units</b>	Railways	
	Airlines	
<b>Outdoor Banqueting</b>		

### 1.4.2.4 Sampling Procedure

The sampling both at the planning and operational levels were immaculate to the extent possible. The objective was to identify a specific unit, take responses from the same and utilize the findings to project the universe. These measures aimed at ensuring representativeness and reducing interviewer bias to the best extent possible. The process has been elucidated in the following diagram and the ensuing paragraphs: -

Figure 1. 10 Sampling procedure adopted



- **Step 1: Comprehensive Database creation:** - This comprised of the following activities:-
  - **Activity 1: First Level Database Preparation:** The database started with Economic Census 2015. Based on the activity codes of the different earmarked economic activities at the State level were identified. Next pin codes of the different identified towns within the State (as in the TOR document and Inception report) were used to identify the individual units within those towns. Thus, first level of database for 66 locations was prepared.
  - **Activity 2: Second Level Database Preparation:** Next, various online sources<sup>3</sup> were scouted in order to add to the units identified in Activity 1. Duplications were removed in order to arrive at a clean database for the subsequent stage.

<sup>3</sup> Some sources we referred to ([www.data.gov.in](http://www.data.gov.in), FHRAI Database, NRAI Database, Online Databases like [www.Indiamart.com](http://www.Indiamart.com), [www.justdial.com](http://www.justdial.com), [www.oyorooms.com](http://www.oyorooms.com), [www.airbnb.co.in](http://www.airbnb.co.in), [www.makemytrip.com](http://www.makemytrip.com) etc.

- **Step 2: Refining comprehensive database into a usable database:** Scanning of each of the identified towns to demarcate **High - Density, Medium - Density** and **Low-Density** Zones based on secondary scanning and observation by local field team of Nielsen. This had the following activities:
  - **Activity 1: Physical Verification:** - Physical visit to the high, medium and low-density zones by the field team specifically to the authorities like Municipalities and Police Stations to check the no. of Operational units (accommodation, restaurants, homestays, wellness units, banquets etc.). This was then matched with the Activity 2 of Step 1. Any mismatch observed in this process was documented and appended in the main database.
  - **Activity 2: Earmarking Zones:** This was followed by a physical visit to the different **earmarked zones** to collect visiting cards from the existing units. The non-existing units were struck off from the database. The high - density zones had 100% scanning, Medium density areas had 50% scanning while low density areas had 25% coverage.
  - **Activity 3: Ensuring Comprehensive Coverage:** The database comprising of no. of units built was thus sent across to the Central Project Planning Team, who then projected the no. of units in medium - density and low - density zones. The projection factor was 50% for Medium - Density Zones and 75% for Low - Density Zones for each of the 66 earmarked cities. This was done to ensure a comprehensive coverage and representation of the responding unit.
  - **Activity 4: Allocation of Sample Size:** The total no. of units to be sampled (as given in the TOR) was then apportioned to each of the cities based on the universe no. collected in the steps indicated above. A minimum of 30 samples for each category of responding units were ensured. Thus, if there was a shortfall in sample for a location, it was compensated by a sample allocation from another geography which had a relatively higher sample size. Thus, a distribution of sample by earmarked cities was arrived at. 10% of extra sample was kept for any exigencies like rejection to respond to the queries etc.
- **Step 3: Sample Selection** – after apportioning the sample to be covered, for each category of hospitality establishments, amongst the 66 locations proportionate to the distribution of total number of hospitality units (by categories) obtained from secondary database and physical scanning, the sample to be covered amongst the different categories of establishments was distributed further amongst the sub-categories of hospitality establishments. The step by step process by which sample selection was undertaken is presented below.
  - Accommodation units
    - After the total sample of 8000 (target sample for accommodation establishments) was proportionately distributed amongst the 66 locations (as per proportion observed in the physical scanning database of 66 locations), for each location, the allotted sample was further

proportionately distributed amongst sub categories of hospitality establishments, which is to hotels, homestays and houseboat accommodations.

- Within the sub-category of hotel, the sample was further proportionately distributed to categories of hotel accommodations – 5 star deluxe, 5 star, heritage, 4 star, 1+2+3 star, classified, non-star, guest house, Bed & breakfast, youth hostel, Gurudwara, etc. then the sample within each of these categories was further distributed proportionately amongst the high density, medium density and low density areas of the location (present in the physical scanning cum secondary database used for sample allocation). Then the sample units to be interviewed were selected by Probability Proportional to Size sampling method (PPS sampling)
- Within the sub-category of homestays, the sample was further distributed proportionately amongst the high density, medium density and low density areas of the location (present in the physical scanning cum secondary database used for sample allocation). Then the sample units to be interviewed were selected by Probability Proportional to Size sampling method (PPS sampling)
- Within the sub-category of houseboats, the sample units to be interviewed were selected by Probability Proportional to Size sampling method (PPS sampling)
- An extra sample of around 10% was selected for interviews anticipating refusals for face-to-face interview for information
- Restaurants (>=10 seats)
  - After the total sample of 10000 (target sample for restaurant establishments) was proportionately distributed amongst the 66 locations (as per proportion observed in the physical scanning database of 66 locations), for each location, the allotted sample was further proportionately distributed amongst sub categories of restaurant establishments, which is to restaurants and sweetshops.
  - Within the sub-category of restaurants and sweetshops each, the sample was further distributed proportionately amongst the high density, medium density and low density areas of the location (present in the physical scanning cum secondary database used for sample allocation). Then the sample units to be interviewed were selected by Probability Proportional to Size sampling method (PPS sampling)
  - An extra sample of around 10% was selected for interviews anticipating refusals for face-to-face interview for information
  - A sample of highway motels/ dhabas/ restaurants (with more than 10 seats) was also interviewed after random selection.

- Travel Agents & tour Operators, Wellness, spa & medical units and Outdoor Banquet halls
  - After the total target sample was proportionately distributed amongst the 66 locations (as per proportion observed in the physical scanning database of 66 locations), for each location, the allotted sample was further proportionately distributed amongst the high density, medium density and low density areas of the location (present in the physical scanning cum secondary database used for sample allocation). Then the sample units to be interviewed were selected by Probability Proportional to Size sampling method (PPS sampling)
  - An extra sample of around 10% was selected for interviews anticipating refusals for face-to-face interview for information
- Hotel Management Institutes
  - Out of 100 institutes to be covered for face to face primary interview, all 42 IHMs were selected for face to face primary interview
  - The remaining 58 sample to be covered was proportionately distributed amongst the 66 locations (as per proportion observed in the physical scanning database of 66 locations), for each location, the allotted sample was further proportionately distributed amongst the high density, medium density and low density areas of the location (present in the physical scanning cum secondary database used for sample allocation). Then the sample units to be interviewed were selected by Probability Proportional to Size sampling method (PPS sampling)
  - An extra sample of around 10% was selected for interviews anticipating refusals for face-to-face interview for information

### 1.4.2.5 Sample Size

The sample size distribution amongst the stakeholders of the study has been provided by the Ministry of Tourism, government of India and is listed below.

**Table 1. 2** Target sample covered in different categories

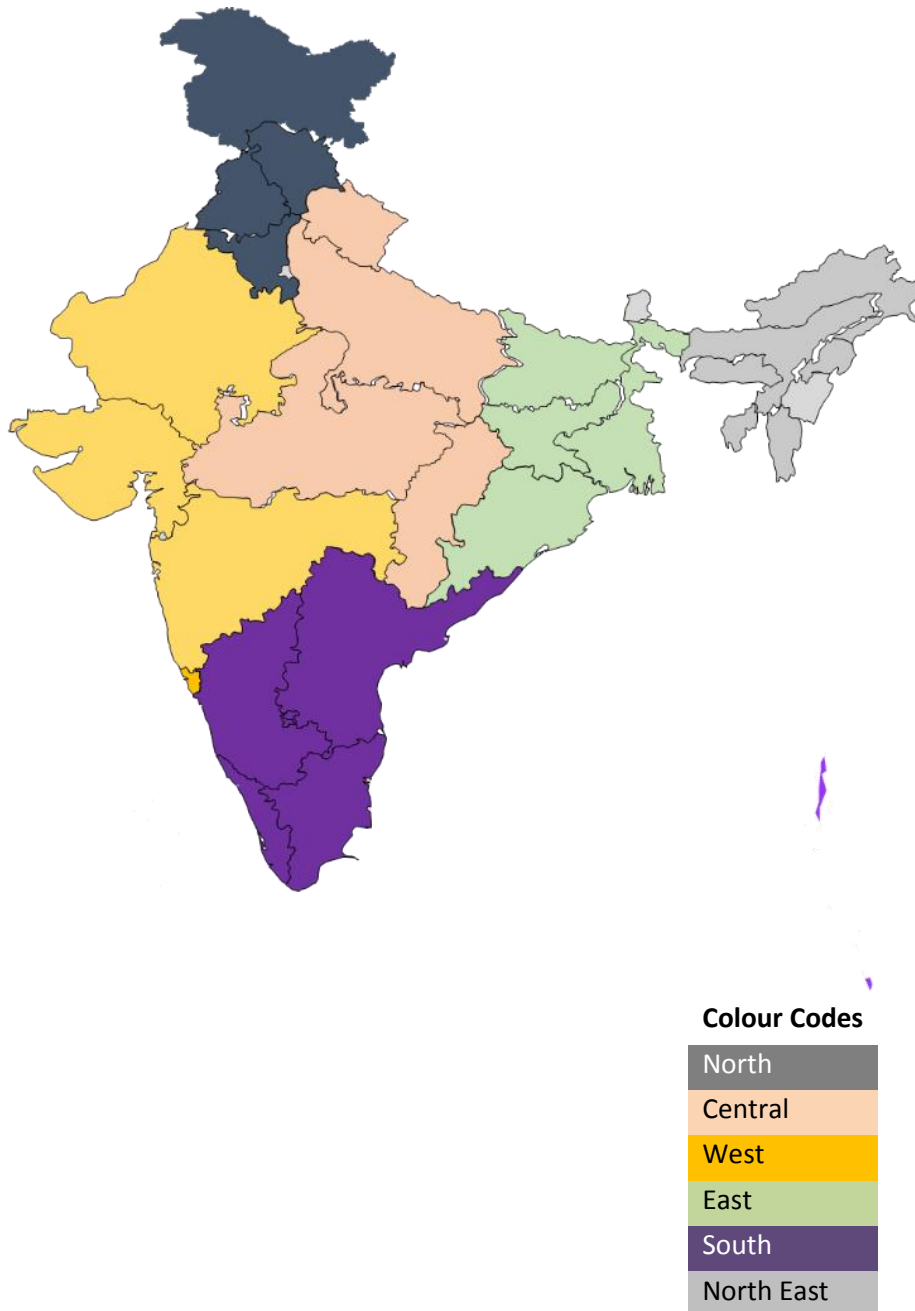
Sub Sector	Total Sample	Sample Achieved
Accommodation units	8000	8016
Restaurants of different types	10000	10418
Wellness units catering primarily to tourists;	200	206
Medical units catering primarily to foreign tourists;	500	495
Tour operators and travel agencies	2000	1998
Outdoor Banqueting units	200	189
e-portals relating to tourism	30	28
Mobile catering units (such as railways and airlines)	Only major ones like IRCTC, Taj SATS, etc.	Major ones like Taj SATS, Rozzana FNB India Catering Satyam Caterers Pvt. Ltd. J.Oberoi Caterers Ambassador’s Sky Chef (SKY Gourmet) Oberoi Flight Catering Services Four Seasons Hospitality Pvt. Ltd. Casino Air Caterers and Flight Services (CAFS) Saj Flight Services Pvt Ltd
Hospitality Institutes like Central and State IHMs, FCIs, IITMs, Pvt Institutes affiliated to NCHMCT and Central Universities offering tourism & hospitality courses (located in cities other than those earmarked)	100	100



### 1.4.2.6 Geographical coverage

The geographical spread for the study has already been provided by the Ministry of Tourism, Government of India in the RFP and is presented below. The zones and the locations have been depicted in the figure and table below.

**Figure 1. 11** Earmarked Geographical Zones



**Table 1. 3** Earmarked Locations in different Zones

Region	Earmarked Cities
North	Delhi
	Gurgaon
	Chandigarh
	Amritsar
	Srinagar
	Leh
	Jammu
	Shimla
	Manali
	Dehradun & Musoorie
	Dharamshalla
	Nainital
Central	Agra
	Lucknow
	Varanasi & Sarnath
	Haridwar & Rishikesh
	Bhopal
	Gwalior
	Ujjain
	Khajuraho
	Raipur
East	Patna
	Bodhgaya
	Ranchi
	Bhubaneswar
	Puri
	Kolkata
	Mandarmani
	Darjeeling
West	Jaipur
	Udaipur
	Jaisalmer
	Jodhpur
	Goa
	Ahmedabad
	Aurangabad

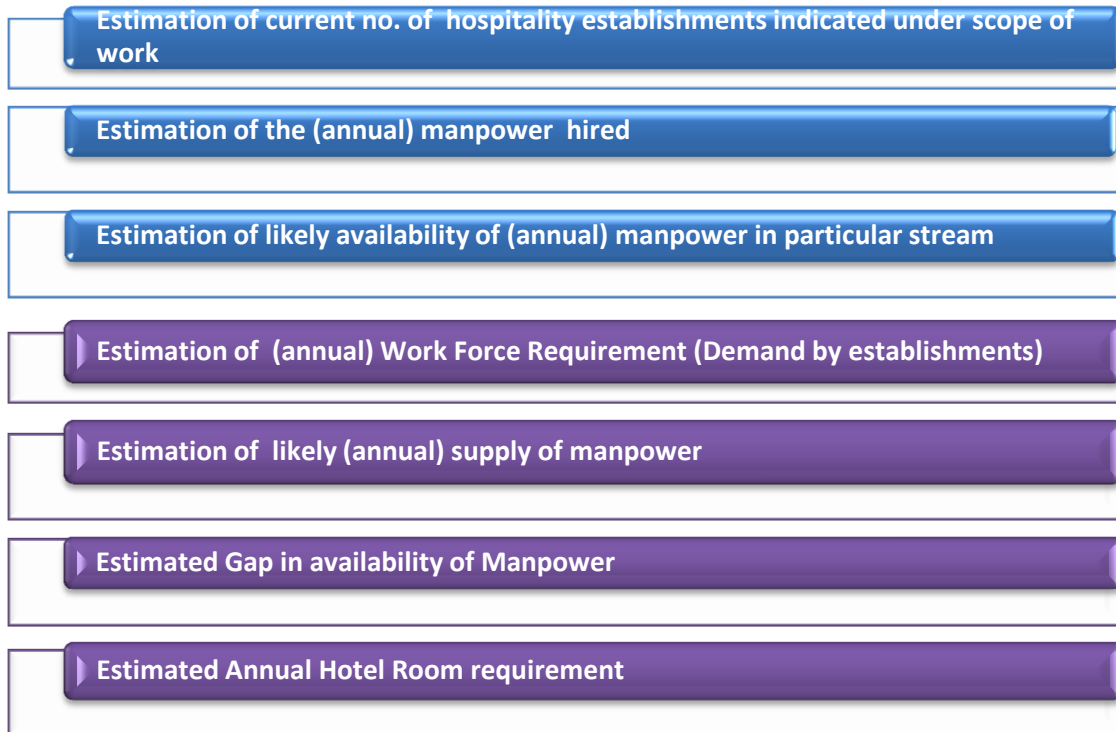
Region	Earmarked Cities
	Mumbai
	Pune
	Mahabaleshwar
	Shirdi
	Dwarka
	Daman
	Diu
South	Hyderabad
	Tirupati
	Mysore
	Cochin
	Alapuzha
	Munnar
	Bangalore
	Mangalore
	Thiruvananthapuram
	Chennai
	Vishakhapatnam
	Ooty
	Puducherry
	Port Blair
Kanyakumari	
North East	Guwahati
	Shillong
	Gangtok
	Imphal
	Agartala
	Dimapur
	Tawang

### 1.4.3 Estimation

#### 1.4.3.1 Methodology of Estimation

The estimation methodology is divided into the following sub sections as depicted in the figure below: -

**Figure 1. 12 Estimation Methodology – An Overview**



**A. Estimation of (annual) Work Force Requirement in a particular category of tourism establishment (Demand by establishments)**

**The inputs for computing the workforce requirement in a particular category of establishment:**

1. Number of establishments in each region (of State / UT) under specified categories for the reference year. Number was ascertained **by counting of units as depicted in point 1.4.2.4.**
2. Annual Number of domestic and foreign visitors in the States/UTs availing facilities of a particular category of establishment, annually: **was ascertained from survey of hospitality establishments.**

- a. Categories of establishments were divided into different classes depending upon their capacity.
  - b. Average number of domestic and foreign visitors provided facilities / services in a particular category of establishment – for each class with a month – wise break – up.
3. Employment pattern: Was ascertained from **sample survey of hospitality establishments** by taking into account the following:
- Intensity of persons employed (for e.g. per 10 hotel rooms / per 10 restaurants seats/ per 10 visitors attended etc.)
  - Estimates of annual manpower hired
    - Annual recruitment due to business growth
    - Annual recruitment due to attrition (due to shift for jobs in other sectors or higher studies)
    - Annual recruitment due to retirement
    - Teachers / trainers intensity
- Based on the above information, estimation of manpower employed under different categories of accommodation units (of different sizes) was done. During the survey, adequate sample size from different categories of accommodation units was maintained. The categories of accommodation units were stratified according to size and estimation of manpower deployed was done separately for different strata.
4. Assessment of the number of teacher/ trainers required in the institutes related to hospitality and tourism sector (trainer intensity per student), was ascertained from survey of Training Institutes.

**Procedure:**

For the  $i^{\text{th}}$  category of establishment in the sample, wherever applicable let:

- $X_i^{FO}$  ..... (annual) manpower hired in front office
- $X_i^{FBK}$  ..... (annual) manpower hired in F&B Kitchen
- $X_i^{FBS}$  ..... (annual) manpower hired in F&B Service
- $X_i^{HK}$  ..... (annual) manpower hired in Housekeeping
- $X_i^{OSC}$  ..... (annual) manpower hired in other specific categories  
 (Relevant to Travel & Trade units and medical & wellness units, primarily catering to tourists)
- $r_i$  ..... number of rooms in the sample
- $R_i$  ..... estimated number of rooms in the universe
- $s_i$  ..... numbers of seats in the sample
- $S_i$  ..... estimated number of seats in the universe
- $n_i$ .....(annual) number of visitors attended by establishments (other than accommodation units and restaurants) in the sample

$N_i$  ..... Estimated number of (annual) visitors attended by establishments (other than accommodation units and restaurants) in the universe

**Note:**

1. Rooms ascertained for Classified Hotels and Unclassified Hotels & other accommodation units
2. Seats ascertained for Restaurants of different types, including dhabas

**B. Estimation of number of units in different categories of establishments:**

The different categories of establishments should be further stratified according to the size of the establishments to enable separate estimation for different sizes. The strata / size may be defined according to the need of the State / UT.

- **Number of Classified Hotels and rooms: Ascertained from administrative records**
- **Estimation of number of accommodation units other than classified and their rooms:**

Estimate 1: Number of units from Municipal Corporation/ Economic Census = Z

Estimate 2: Number of units in the trade directory = Y

Estimate 3: Number of units in the selected scanned pockets in a city on the basis of physical scanning = x

Let number of units in the trade directory in the selected scanned pockets in a city = y

Estimated Total number of units in a city =  $(x/y)*Y = X$ , say

*Note: The maximum figure from the 3 estimates (X, Y, Z) to be taken = X' say*

*Note: Separate estimation should be carried out for 3 types of areas:*

*High Density, Moderate Density and Low Density*

*All pockets falling in the High Density was covered. Suitable proportion (50%) of pockets falling in Medium and (25%) low Density category was covered.*

*These 3 estimates were clubbed to get an idea of number of units at each city*

**Estimated number of rooms in 1<sup>th</sup> category =  $R_i = (X'/X)*r_i$  :: Input 1 for AHRR**

**(EXISTING SUPPLY)**

**C. Estimation of units in different categories of establishments (other than accommodation units and motels/restaurant on the highways)**

Estimate 1: Number of units from Municipal Corporation/ Economic Census/travel & trade association of India & tour operator association/Ministry of Health & Family Welfare and directorate of health services = Z

Estimate 2: Number of units in the trade directory = Y

Estimate 3: Number of units in the selected scanned pockets

1. Rooms was ascertained for Classified Hotels and Unclassified Hotels & other accommodation units
2. Seats was ascertained for Restaurants of different types, including dhabas in a city on the basis of physical scanning= x

$$\text{Estimated Total number of units in a city} = (X/y) * Y = X,$$

Note: The maximum figure from the 3 estimates (X, Y, Z) to be taken = X' say

Note: Separate estimation was carried out for 3 types of areas:

High Density, Moderate Density and Low Density

These 3 estimates were clubbed to get an idea of number of units at each city.

**D. Estimation of total motels/ restaurants on the highways**

Number of units per 100 km = n

Units per km = n/ 100

Total length of highways in a zone = H

Total Units in a zone = n/ 100 \* H= N, say

$$\text{Estimated number of seats} = Si = (N/n) * si$$

**E. Estimation of (annual) manpower hired**

**a) Estimation of (annual) manpower hired for Hotels**

$$Mi = [(xi^{FO} + xi^{FBK} + xi^{FBS} + xi^{HK} + xi^{OSC}) * Ri / ri]$$

Similarly, the same estimation procedure was used for different categories of accommodations

**b) Estimation of (annual) manpower hired by Restaurants of different types**

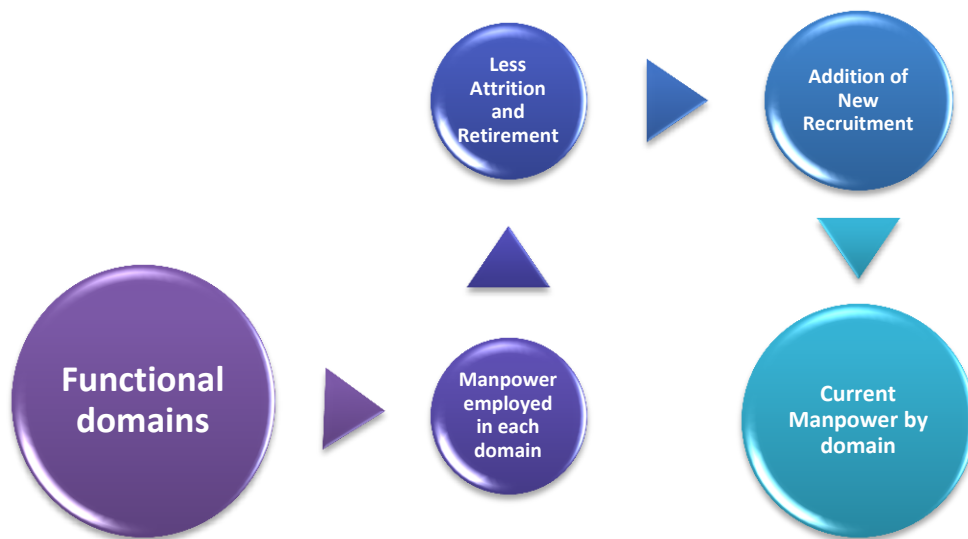
$$Mi = [(xi^{FBK} + xi^{FBS} + xi^{OSC}) * Si / si]$$

**c) Estimation of (annual) manpower hired by Travel & Trade and Medical & Wellness units**

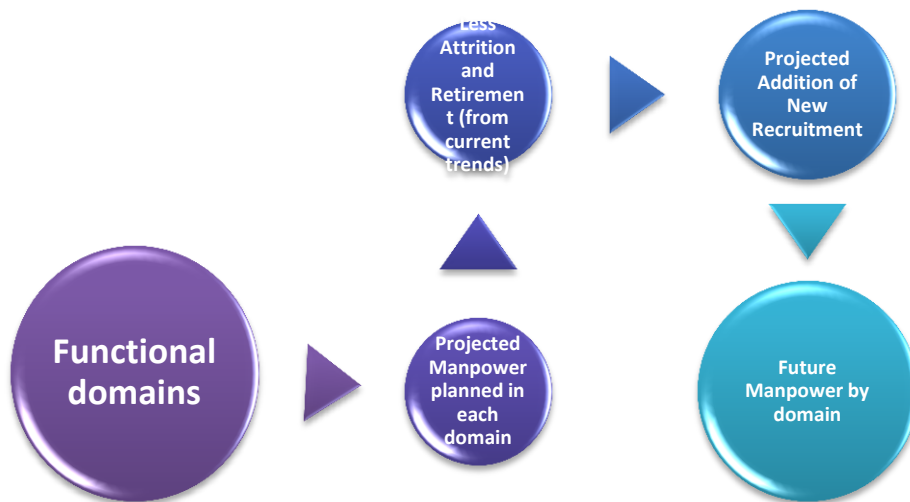
$$Mi = [(xi^{OSC}) * Ni / ni,$$

- d) **Annual Attrition**  
 Annual Attrition at present levels was ascertained by taking into account both retirements as well as that manpower which leaves job for other sectors / higher studies
- e) **Estimated no. of functional specializations**  
 Functional specializations in different hotels were captured in the questionnaire. Break up of total manpower into different areas of specialization was undertaken and were applied on estimation of (annual) manpower hired for Hotels/ Restaurants.

**Figure 1. 13** Estimation of Current Manpower



**Figure 1. 14** Estimation of Future Manpower





**f) Estimated number of trainers required**

For each category of establishment, number of trainers required to train the required manpower was ascertained. This was done on the basis of requirement of trained manpower in each category and the trainer / student ratio.

**g) Total manpower requirement was thus obtained by summing (annual) manpower hired over all categories of establishment units taking into account requirement arising due to attrition and requirement of trainers.**

**II Estimation of likely availability of (annual) manpower in a particular stream: (Supply by Institutes)**

**Inputs for computing manpower supply:**

The estimation of likely (annual) supply of manpower was ascertained from the sample survey of training institute. The estimation took into account the following:

- (annual) Manpower supply as per existing infrastructure
- (annual) Attrition among students due to higher studies
- (annual) Attrition among students due to employment in other sectors

**Procedure followed**

**a. Hospitality Institutes**

All State / Central Institutes of Hotel Management and Food Craft Institutes were covered while in case of private institutes, a sample survey was done on selected institutes.

First a frame was prepared. Details like size / type (stream) of the training institute was ascertained from travel / Trade directories/ snow balling method. Taking into consideration their size (annual seats available) and type the frame was divided into strata. Selection of private institutes was representative depending upon probability proportional to size of the stratum.

Total number of Private Institutes in  $i^{th}$  strata =  $P_i$

Total (annual) manpower supplied by IHMs and FCIs = A

(annual) Manpower supplied by the private institutes of the  $i^{th}$  strata in the sample = m

Number of private institutes of  $i^{th}$  strata in the sample =  $p_i$

Estimated (annual) manpower supplied by private institutes =  $M_i = m_i * (P_i / p_i)$

Estimated (annual) number of manpower supplied in the universe = A + Summation ( $M_i$ )

## b. Travel & Trade Institutes

*The same estimation procedure has been used for travel & trade institute*

### Estimation Procedure (Future Levels)

#### A. Estimation of (annual) Work Force Requirement (Demand by establishments)

##### 1. Annual recruitment due to business growth

(Annual) Tourist traffic for the future reference years was projected based on the CAGR (of recent years) observed in the record-based number of visitors (domestic & foreign) availing facilities / services of a particular category of establishment.

The (annual) work force requirement in different categories of establishment was estimated as follows:

a. The number of **Hotel rooms** required in the future reference years was estimated as follows: -

i. Expected No. of visitors requiring accommodation per annum × Average room nights per visitor during the year = No. of room nights required/ annum

ii. No. of room night required per annum/ No. of persons in a room/365 = Average No. of rooms required per day = **Rfi :: Input 2 for AHRR (FUTURE DEMAND)**

It is assumed that in each category, the manpower required per 10 rooms in future years would be the same as today.

b. For forecasting the number of restaurants (and inter alia seats) the CAGR (of recent years) observed in the population of the district may be made use of. It is assumed that in each category, the manpower required per 10 seats in future years would be the same as today.

c. For forecasting the number of roadside Dhabas & Motels, the planned increase in National and State Highways slated for future years & the numbers of road side Dhabas/Motels (seats/rooms) per 100 km. of highways may be made use of. Again it is assumed that the manpower required in each category per 10 rooms/seats would be the same as today.

d. In case of Travel & Tour units/ Medical & Wellness units depending on whether the planned increase slated for future years was available, the same was utilized, otherwise touristic growth observed in recent years was utilized.

It is assumed that in different category, the manpower required per 10 tourists under these establishments would remain the same as observed today.

2. **An** additional requirement (say R') in each of the 4 categories mentioned above was ascertained to take into account the attrition amongst employees due to retirement, for other sector employment or higher studies. It may be assumed that the attrition would continue at the existing levels.
3. The total manpower requirement in future years was thus, estimated by adding up the aforesaid mentioned components.

**B. Estimation of likely (annual) supply of manpower:**

The manpower supply in the future reference years was estimated by taking into the following:

- a. Existing annual supply
- b. Increase in Annual supply due to planned augmentation in Infrastructure of training institutes.
- c. It was assumed that the supply side attrition, due to students leaving for higher studies/employment in other sectors would continue at the existing levels.

**C. Estimated Gap in availability of manpower:**

The estimated gap in availability of trained manpower was arrived at by subtracting manpower supply (i.e. availability) from manpower demands (i.e. requirement).

On the basis of the estimated gap, efforts would be made to fill the gap by taking measures like opening of more training institutes, undertaking short term training programmes, etc.

**D. Estimated Additional Hotel Room Requirement:**

The Estimated Additional Hotel Room Requirement in ith category for a future reference year =  $R_{fi} - R_i$

(i.e. Future demand as obtained from Input 2 for AHHR – Existing supply as obtained from Input 1 for AHHR)

## 1.4.4 Operational Methodology

### 1.4.4.1 Meeting Ministry of Tourism

The study was carried out basis a clearly thought through work plan and implementation was done with precision. While Nielsen team had undertaken several such surveys, which have been accomplished successfully, there were challenges which have provided excellent opportunity to the team for understanding of the field realities. The tasks performed under the survey were grouped into three distinct stages:

- Planning and preparation stage
- Field preparatory activities and training
- Post-survey work

The project manager and the project core team met with the members of MOT team to have discussions on the following:

- Discuss and firm up the various sources for the generation of the universe of different categories of the segments under study
- Prepare a check list of the final likely numbers in various segments across 66 locations under study
- Design the questionnaire for different categories of the respondent and sampling plan

### 1.4.4.2 Desk Review

Desk review or desktop research is a very important step in this study as the first draft of list of hospitality establishments was formulated from desktop research. Desk research also helped in understanding the hospitality sector and the present scenario in hospitality sector in terms of manpower present and manpower requirement.

Some of the sources that were utilized during desk research are presented below.

- Accommodation units
  - Hotel room booking websites like trivago, oyo rooms, booking.com, hotels.com, etc.
  - Search engines like google and google maps
  - Association body's websites
  - Incredible India and state government websites
  - Lonely planet and wikitravel
  - Yellow pages
- Restaurants
  - Websites and apps like Zomato, Food panda, dineout,etc.
  - Search engines like google and google maps

- Travel and tourism websites like make my trip, etc.
- Lonely Planet and Wikitravel
- Association body's web pages
- Brochures like Times food guide etc.
- Yellow pages
  
- Medical Tourism Units
  - Websites of prominent groups of Hospitals
  
- Wellness units catering to tourists
  - Travel & tourism websites
  
- Hospitality training institutes/ universities offering hospitality courses
  - UGC
  - Websites
  
- Outdoor banquets
  - Yellow pages
  - Websites like justdial, sulekha.com, Indiamart, etc.
  
- Large mobile kitchens
  - Websites
  - Search engines
  
- Tour operators & travel agencies
  - Search engines like google and google maps
  - Association body's websites
  - Incredible India and state government websites
  - Lonely planet and wikitravel
  - Yellow pages
  - Websites like justdial, sulekha.com, Indiamart, etc.
  
- Tour & travel related e-portals
  - Websites
  - Search engines

### 1.4.4.3 Questionnaire Preparation

For each broad category of hospitality establishments, separate questionnaires were prepared. The questionnaires were prepared for the following categories of respondents.

- Classified/ unclassified Accommodation units - GM/ HR manager/ Manager/ Owner/ Trustee
- Restaurants of different types/ dhabas - Owner/ manager
- Wellness units/ spas catering to tourists - Owner/ manager
- Medical Tourism units - Head/ PRO/ Foreign patient's desk/ manager
- Tour operators & travel agencies- Owner/ Partner/ Operations in charge
- Outdoor banqueting establishments- Owner/ manager
- Tourism e-portals - HR head/ operations head/ manager
- Large Mobile catering units- Operation head/ manager
- Hospitality institutes/ Universities courses - HOD/ Principal/ Course Head

***The questionnaires were shared with officials of Market research Division, Ministry of Tourism for their comments and inputs and after incorporating the same due approval was taken.***

### 1.4.4.4 Pre-Testing of Questionnaires

- Post the finalization of the universe of various segments under study for each of the 66 locations through secondary sources – directories, online portals, associations, local bodies, Ministry of Health, Department of Police, Department of Fire, Municipal Corporation as well as physical scanning the sample was drawn as per the sample to be achieved as mentioned in the TOR.
- For the Pilot of the main survey wherein the questionnaires were administered, around 2 units from each type of stakeholders covered in the study was contacted in Delhi NCR during the Pilot phase.
- The pilot was conducted both by the research as well as the field team comprising of the following team members: -
  - Research Team Professional
  - Field Executive
  - Supervisors
- The objective of the pilot was to ensure that the questions are appropriately worded for easy administration and comprehension at respondent end.
- The findings of the pilot was collated and communicated to Market Research Division, Ministry of Tourism, Government of India necessary modifications required in the questionnaire was carried out and informed to the Ministry of Tourism. The final modified questionnaire was used for the main survey.

#### 1.4.4.5 Training of Field Teams

The training sessions of field teams/ field briefings happened at the 6 zonal centres mentioned below.

- North Zone Training Session – Gurgaon
- West Zone Training Session – Mumbai
- East Zone Training Session – Kolkata
- South Zone Training Session – Bangalore
- Central Zone Training Session – Lucknow
- North East Zone Training Session – Guwahati

Each training session was for 2 days duration during which the Research team members trained the supervisors and field personnel on the questionnaires and how to approach the respondents. They also briefed them on the study and the information areas. During the training sessions, the enumerators also underwent mock data collection sessions and the research team was also apprised of their grasp on the questionnaires. The officials from the Market Research Division, Ministry of Tourism were also invited to attend these sessions so that the teams can get valuable inputs on the study from them.

The physical canvassing of high and medium density areas of cities for strengthening of the list of establishments will be undertaken by the 4 supervisors as they are more experienced with conducting similar exercises for past studies. The details of the field supervisors are present in the section on team composition

#### 1.4.4.6 Quality Control & Monitoring

Field professionals of Nielsen – involved in the B2B studies having immense experience in handling high-end contacts carried out the primary research work. Our field network followed the norms that are a part of the MQCS (Minimum Quality Control Standards) which ensured veracity of information collected and consistency in the responses obtained.

- Better quality of information collected
- Authentic quality of the data stricter monitoring and control of field teams
- Corrective action to ensure solutions to field problems

The field strength of Nielsen (India) Private Limited reflects our capability to handle large scale surveys in all the states in India due to the presence of field offices in all the major states in India.

Systems had been implemented in field which implies more stringent quality control measures due to the MQCS (Minimum Quality Control Standards). For instance, at the start of fieldwork / during fieldwork, the following minimum standards were ensured.

- General briefing
- Project Specific Briefing
- Mock-calls
- Accompanied calls
- 100 per cent scrutiny
- At least 25 per cent back-checks
- At least 10 per cent of the fieldwork for each interviewer checked

**Pre-testing and Finalization of Questionnaires** In order to ascertain the suitability of questionnaires in actual field conditions, all the instruments were pre-tested in the field by the professionals and field executives involved in the study. The purpose of this exercise will be to firm up on the following aspects.

- Completeness of range of issues/ variables covered
- Relevance of issues/ variables/ response options
- Flow/ sequence of questions
- Terminology used

**Involvement of researcher:** The researchers were also involved during the fieldwork phase and interact with investigators, supervisors and the Field Executives to have a detailed account of how the quality was being monitored. A feedback session was also conducted by the researcher with all the field teams to gather insights on the actual field situation and sharing of experiences. These issues are being incorporated in the report for better insights and understanding of the issues.

**Validation of data sets:** Each questionnaire was reviewed for quality and 30% back check was also done by field supervisors to assure the quality in data collection. The data collected was validated and cross-checked at source. Cross-verification and data cleaning was also carried out prior to data entry and submission of data to the client. The focus of quality control was on prevention of errors or failures rather than on control following external and internal audits during data collection and data entry.

**Coding and Data Entry:** The scrutinized data was used for conducting thorough analysis and the tables were generated, covering all the information areas as mentioned in the TOR document/ proposal. The data entry of the same was carried out in SPSS and analysed for the required outputs.



#### 1.4.4.7 Data Collection

Field professionals of Nielsen – involved in the B2B studies having immense experience in handling high-end contacts carried out the primary research work. Our field network follows the norms that are a part of the MQCS (Minimum Quality Control Standards) which ensures veracity of information collected and consistency in the responses obtained.

- Better quality of information collected
- Authentic quality of the data stricter monitoring and control of field teams
- Corrective action to ensure solutions to field problems

The primary survey will be undertaken by Nielsen field enumerators who after having been trained during zonal training sessions by Nielsen research team, will be accompanied by the supervisors for the first day so as to check their actual performance on the field. If their performance is satisfactory, they will be sent for data collection post that independently. Each zones field team will be reporting to their allotted supervisor for any concerns and the supervisors are responsible for back checks of collected data.

Please note that the entire data collection exercise will be done face-to-face with the particular respondents from the particular categories of hospitality establishments. The enumerators/ supervisors will first set up an appointment with respondent and then proceed for face-to-face interview for data collection.

#### 1.4.4.8 Analysis

A detailed analysis plan and tabulation will be developed by Nielsen for each questionnaire to ensure complete analysis on the data sets for reporting purposes. The questions will be grouped in various tables and necessary cross-tabulations basis background characteristics.

- Nielsen shared the analysis and tabulation plan.
- The first run of the estimations and tables were undertaken not only to understand the results, but also to weed out unnecessary cross-tabulations, so that a balanced understanding of the results emerges.
- The output tables (including cross-tables and on key indicator constructs) were finalized in discussion with Market Research Division, Ministry of Tourism, and Government of India.

#### 1.4.4.9 Report

The core research team shall prepare the same and based on the findings of the study deliver the following

- Database of Hospitality Establishments
- Database of Hospitality Training Institutes
- Current levels of manpower employed
- Level of self-employment in the Hospitality & allied Sectors

- (Annual) Demand / Workforce requirement (taking into consideration trend, attrition and retirements). (Present and Future levels both)
- (Annual) Supply of manpower (as per the existing/ already planned human resource development infrastructure and supply side attrition). (Present and Future levels both)
- Assessment of gap between the annual requirement and the annual availability of the trained persons on the basis of the demand – supply position. (Present and Future levels both)
- Assessment of investment required to bridge the skill gap in each of the subsector
- Assessment of Hotel rooms and their future requirement
- Type of skills required by the Industry
- Average remuneration at different levels for different segments
- Reasons for attractiveness amongst students/employees
- Assessment of tariff profile of Hotels across the location
- Any other important aspect relevant to policy formulation

## 1.5 Estimated Total No. Of Units in 66 locations under study post Physical Scanning Exercise

The following table depicts the total no. Of units in 66 locations under study post Physical Scanning:

**Table 1. 4 Physical Scanning of data from 66 locations under study**

Zone	State	Locations	Accommodation Units (including Homestays and Houseboats)	Restaurants (including sweet shops)	Tour And Travels	Spas / Wellness	Banquets
North	New Delhi	Delhi	2488	1163	403	95	51
	Haryana	Gurgaon	490	301	60	72	72
	Punjab	Chandigarh	409	328	74	26	14
		Amritsar	433	244	221	18	25
	Jammu and Kashmir	Srinagar	497	894	107	10	4
		Jammu	200	0			
		Leh	367	578	5	8	5
	Himachal Pradesh	Shimla	639	231	152	17	0
		Manali	716	203	191	15	11
	Uttarakhand	Dehradun	501	487	366	70	15

Zone	State	Locations	Accommodation Units (including Homestays and Houseboats)	Restaurants (including sweet shops)	Tour And Travels	Spas / Wellness	Banquets
		& Musoorie					
		Nainital	594	284	60	18	15
		Rishikesh	357	236	98	32	0
		Haridwar	846	150	40	9	62
		Dharamshala	321	0			
	Uttar Pradesh	Varanasi & Sarnath	484	390	31	29	69
		Agra	374	190	19	9	80
		Noida	456	461	63	65	53
		Lucknow	484	265	51	22	105
Central	Madhya Pradesh	Bhopal	379	208	21	11	67
		Gwalior	156	66	15	8	57
		Ujjain	167	99	20	6	8
		Khajuraho	62	116	8	2	4
	Chhattisgarh	Raipur	182	113	20	10	28
East	Bihar	Patna	407	157	50	25	152
		Bodhgaya	230	55	31	4	14
	Jharkhand	Ranchi	2684	204	31	17	95
	Odisha	Bhubaneswar	404	277	70	22	72
		Puri	609	125	142	10	15
	West Bengal	Kolkata	1201	805	150	50	151
		Darjeeling	531	96	27	5	16
Mandarmoni		39	19	5	2	0	
West	Rajasthan	Jaipur	816	588	129	28	38
		Udaipur	351	140	36	20	8
		Jaisalmer	187	121	49	7	0
		Jodhpur	294	180	35	16	26
	Goa	Goa	1448	323	100	100	80
	Gujarat	Dwarka	92	75	5	2	0
		Ahmedabad	811	1053	256	50	65
	Maharashtra	Aurangabad	250	219	6	6	
		Mumbai	2468	3413	812	133	80
Pune		897	858	60	46	70	

Zone	State	Locations	Accommodation Units (including Homestays and Houseboats)	Restaurants (including sweet shops)	Tour And Travels	Spas / Wellness	Banquets
		Shirdi	455	121	8		
		Mahabaleshwar	268	99	15	7	6
	Daman and Diu	Daman and diu	238	390	20	13	5
South	Telangana	Hyderabad	941	974	327	50	143
	Andhra Pradesh	Thirupathi	355	126	66	24	66
		Vishakhapatnam	259	159	50	16	30
	Karnataka	Mysore	159	172	89	6	18
		Bangalore	1765	720	125	104	104
		Mangalore	144	60	35	6	10
	Kerala	Cochin	475	262	46	15	15
		Alapuzha	152	66	3	7	7
		Munnar	140	32	80	15	0
		Thiruvananthapuram	179	333	34	15	15
	Tamil Nadu	Chennai	1486	705	285	95	89
		Kanyakumari	107	55	12	3	28
		Ooty	496	63	41	5	7
	Puducherry	Puducherry	390	107	15	10	85
Andaman and Nicobar	Port Blair	194	27	29	3	2	
North East	Assam	Guwahati	313	140	99	16	55
	Meghalaya	Shillong	148	76	66	4	5
	Sikkim	Gangtok	513	87	174	5	14
	Manipur	Imphal	52	76	110	8	8
	Tripura	Agartala	95	85	106	5	22
	Nagaland	Dimapur	95	45	32	9	4
	Arunachal Pradesh	Tawang	54	14	17	0	0
<b>Total</b>			<b>34794</b>	<b>20709</b>	<b>5903</b>	<b>1536</b>	<b>2365</b>

## Section 2

# Findings

This section highlights the findings from the secondary and primary research in accordance with the study objective



## 2. Findings

### 2.1. Demand Side

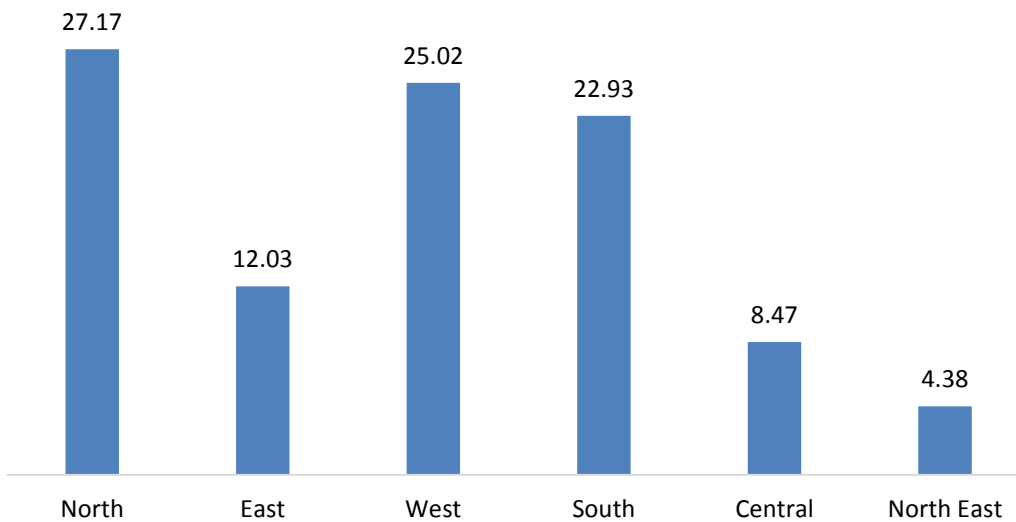
The demand side comprised of the different types of units wherein there is a necessity of manpower, whether skilled or unskilled.

#### 2.1.1. Accommodation Units

##### 2.1.1.1. Profiling of the Units

The findings from the accommodation units have been depicted in the following sections:

**Figure 2.1** Zonal Distribution of No. of Accommodation Units



*All figures in percentages*

*Source: Primary Survey*

North had the highest representation followed by West and South. This was followed by East. North East followed by Central zones had the lowest representations.

**Table 2. 1** Zonal Distribution of No. of Accommodation Units

Zones	Types of Accommodation Units												
	Heritage	5 Star	4 Star	1/2/3 Star	Guest Houses	Bed & Breakfast	Time Share Resorts	Unclassified Hotels	Home Stays	Youth Hostels	Cruise	Floating Accommodation	Others
North	1.3	0.9	2.7	23.9	17.5	0.7	0.8	39.5	9.9	0.4	1.6	0.7	0.3
East	0.0	0.4	0.6	17.3	20.7	0.0	2.8	50.2	6.1	0.4	0.0	1.3	0.0
West	0.1	0.2	1.2	19.4	8.3	0.2	0.5	62.1	7.1	0.1	0.1	0.7	0.0
South	0.5	2.5	4.4	52.3	11.5	0.5	1.2	13.7	10.3	0.9	0.7	1.4	0.0
Central	0.0	0.8	0.0	13.2	14.0	0.0	0.0	54.3	15.2	0.0	0.0	2.5	0.0
North East	0.0	4.3	6.0	13.4	4.3	0.0	2.8	49.3	16.2	3.4	0.3	0.0	0.0
All India	0.6	1.2	2.6	27.9	13.7	0.4	1.2	40.8	9.4	0.6	0.7	1.0	0.1

*All figures in percentages*

*Source: Primary Survey*

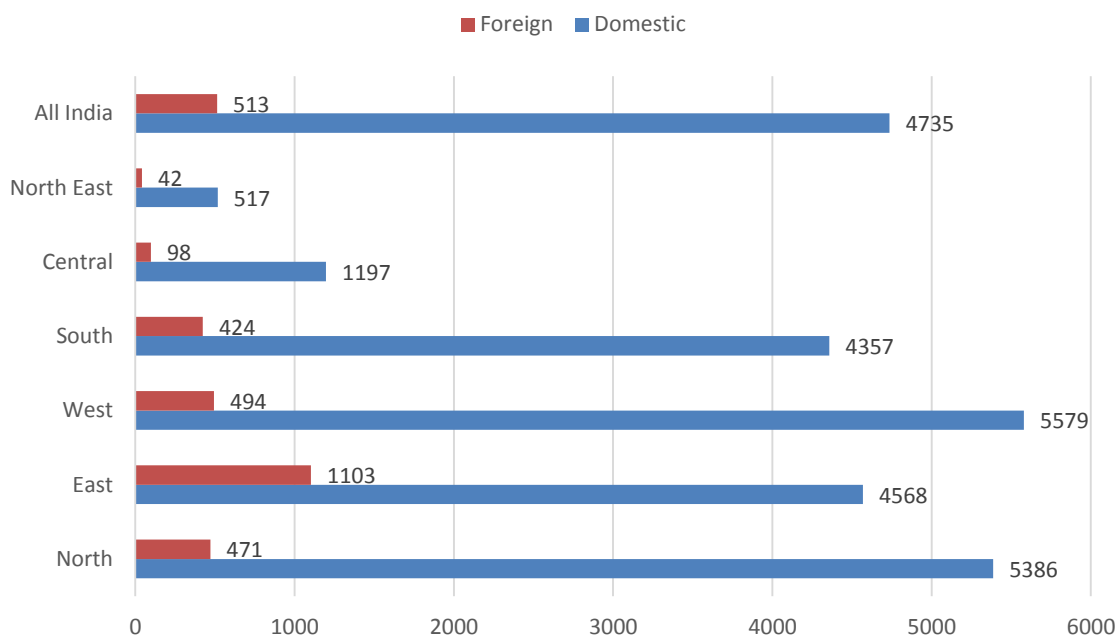
The Table above indicates the fact that 1/2/3 Star Hotels followed by Guest Houses, Unclassified Hotels and Home stays had maximum representation in the sample. The Zone specific observations were as indicated below:-

- North Zone had the highest representation of Heritage Units, reasonably high representation of Guest Houses< Bed & Breakfast Units and Homestays
- East had higher representations of Guest Houses, Unclassified Units, Time Share Resorts and Floating Accommodations
- West had highest representation of unclassified units
- South had above average representations for Star category hotels, Bed & Breakfast, Home Stay, Youth Hostels, Cruise and gloating accommodations
- Central Zone had highest representations for Guest Houses, Unclassified Units and Home Stays
- North East Zone had higher representation in terms of 5 Star, 4 Star, Time Share Resorts, Unclassified Hotels, Home Stays and Youth Hostels.

### 2.1.1.2. Trends in Tourist visits

The tourist visit trends, as reported by the surveyed sample accommodation units, have been depicted in the figure below.

**Figure 2. 2** Average annual Tourist visits per Unit



All figures in absolute nos.

Source: Primary Survey

As depicted in the figure above, West had the highest average annual domestic visitor/ unit followed by North and East. South Zone had representations more or less in congruence with All India figures. In terms of foreign visitor trends, East had the highest share with North, West and South recording more or less similar levels of visit.

**Table 2. 2** Average annual Tourist visits per Unit

Type of Units	No. of Units	Domestic Tourist Visits	International Tourist Visits
Heritage	0.6	1.0	0.5
5 Star	1.2	4.8	16.6
4 Star	2.6	8.2	9.7
1/2/3 Star	27.9	33.3	37.0
Guest Houses	13.7	8.2	3.6
Bed& Breakfast	0.4	0.2	0.1
Time Share Resorts	1.2	2.0	3.2
Unclassified Hotels	40.8	37.7	26.7



Home Stays	9.4	3.5	2.0
Youth Hostels	0.6	0.2	0.2
Cruise	0.7	0.2	0.1
Floating Accommodation	1.0	0.5	0.2
Others	0.1	0.1	0.2

All figures in percentages

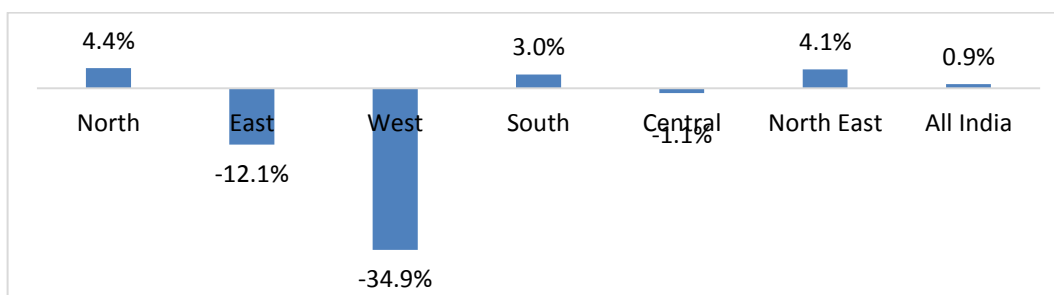
Source: Primary Survey

As depicted in the table above, there is a trend amongst domestic tourists to avail accommodation in the Unclassified Hotels, followed by Star hotels in the unclassified category, followed by Guest Houses and 4 Star hotels. Amongst the foreign tourists however, there is a trend to avail accommodation in Star category as well as Unstarred accommodation.

### 2.1.1.3. Trends in addition of no. of rooms

The trends in no. of rooms added (for the year 2014-18), as reported by the surveyed sample accommodation units, indicated the following aspects.

Figure 2.3 Compound Annual Growth Trends in addition of no. of rooms



All figures in percentages

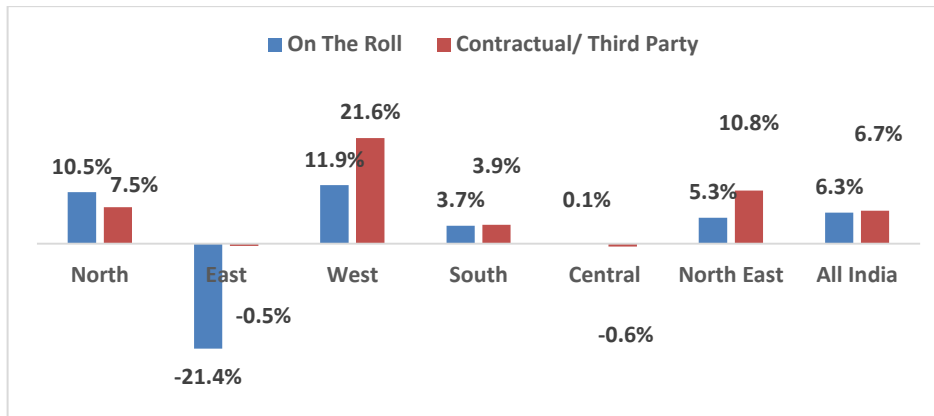
Source: Primary Survey

- Overall growth trends indicate a minimal growth across India for a period of last 5 years, driven predominantly by growth in North, South and North East zones. This modest growth is offset by de-growth in West, East and Central zones
  - In North, significant additions have been observed in the 5 Star as well and Youth Hostels.
  - In South, significant additions have been made in the time share resorts
  - In North East, no. of additions of rooms made in 1/2/3 Star Hotels and Home Stays rule the roost
  - In East, there has been considerable decrease in addition of no. of rooms in 1/2/3 Star hotels. For West, the decrease is predominantly in the Un-classified category.

#### 2.1.1.4. Trends in addition of no. of employees

The trends in no. of employees added (for the year 2014-18), as reported by the surveyed sample accommodation units, indicated the following aspects.

**Figure 2. 4** Compound Annual Growth Trends in addition of no. of employees



All figures in percentages

Source: Primary Survey

- Overall growth trends indicate a growth rate of 6%+ across India for a period of last 5 years, driven predominantly by growth in all zones except East, which is showing de-growth in terms of hiring both on the roll as well as Contractual/Third party manpower. It is to be observed herein, that only North Zone has recorded an increasing hiring trend of on the roll manpower, while with the exception of insignificant growth in the Central zone, rest of the zones have indicated higher recruitment of Contractual/Third party manpower.
  - Hiring trends in **On the roll** Manpower
    - In North, Bed & Breakfast has recorded the highest growth followed by Youth hostels and Guest Houses. Homestays and Star Hotels (up to 3 Star) follow suit. This is followed by Unclassified and 4 Star Hotels.
    - In South, significant additions have been made in the 4 Star Hotels and in the Home stays
    - In North East, no. of additions of manpower made in 1/2/3 Star Hotels and Home Stays rule the roost
    - In East, there has been considerable decrease in addition of no. of rooms in 1/2/3 Star hotels, Guest houses and unclassified hotels.
    - For Central, considerable hiring in on the roll manpower has been observed in the Guest Houses
    - For West, increase in hiring on the roll manpower observed predominantly in Star category (5 Star and 1,2,3 Star) in addition to Unclassified Hotels.

- Hiring trends in **Contractual/Third party** Manpower
  - In North, hiring in the 4 Star category, followed by unclassified and 5 - Star categories have driven hiring trends of Contractual/Third party manpower.
  - In South, significant additions have been made in the Unclassified category for the period under consideration
  - In North East, no. of additions of Contractual/Third party manpower made in Home Stays rule the roost
  - In East, only the unclassified hotels stand out.
  - For Central, considerable hiring in Contractual/Third party manpower has been observed in the Guest Houses in similar lines with hiring trends of on the roll manpower.
  - For West, increase in hiring Contractual/Third party manpower observed predominantly in Star category (5 Star and 1,2,3 Star) in addition to Unclassified Hotels and Home stays.

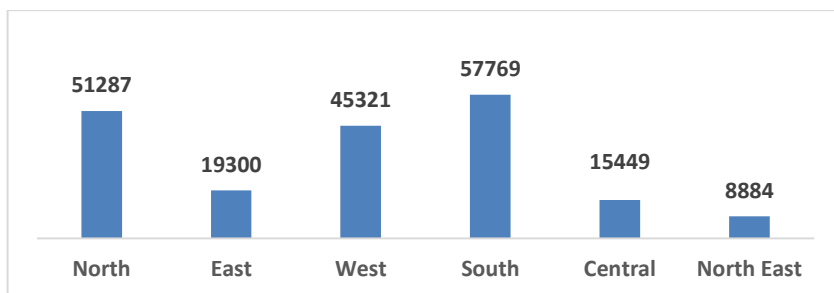
**The average Tariff of different category of hotels & by type of accommodations provided below.**

Room Type	5 Star/ 5 Star Deluxe		4 Star		3 Star	
	Peak season tariff	Lean season tariff	Peak season tariff	Lean season tariff	Peak season tariff	Lean season tariff
Single Occupancy	8500.00	7000.00	7000.00	5500.00	4500.00	3000.00
Double Occupancy	10000.00	8000.00	8500.00	7500.00	5500.00	4500.00
Luxury Room	12000.00	8000.00	10000.00	9000.00		
Deluxe room					6000.00	5000.00
Suite	15500.00	12000.00	12500.00	10000.00	7000.00	6000.00
Executive	9800.00	9000.00	8500.00	7500.00	6500.00	5500.00

### 2.1.1.5. Types of Rooms available

The types of rooms available have been illustrated in the diagram and elaborated in the ensuing paragraphs. In all the zones surveyed, the total no. of rooms recorded was 198010 with the regional distribution as depicted in the following figure.

Figure 2. 5 No. of rooms in different zones



All figures in absolute nos.

Source: Primary Survey

- Overall no. of rooms indicate the fact that highest no. of rooms in North zone and south zones followed by West and East Zones. North East has significant no of rooms available while Central is still in the growing phase.
- Overall no. of rooms by different types indicate the fact that double bed has the highest population followed by Deluxe/ Luxury. This is followed by Single Bed and Superior rooms. The zonal representation of type of room has been depicted in the Table below:-

Table 2. 3 Type of rooms of total rooms in the zone

Zones	No : of Rooms							Grand Total
	5 Star Deluxe	5 Star	4 Star	1/2/3 Star	Guest House/Unclassified Hotel	Heritage	Home Stay/Bed & Breakfast/Gurudwara s/Dharamshala	
Central	0	156	436	3932	9466	374	1298	15662
East	0	488	351	4320	11754	0	1578	18491
North	1672	1768	3918	14958	21563	698	3635	48212
North East	0	0	1509	1678	3796	0	1523	8506
South	0	3940	6862	26682	16027	1104	3369	57984
West	2115	3648	1652	13245	24267	784	3444	49155
<b>Grand Total</b>	<b>3787</b>	<b>10000</b>	<b>14728</b>	<b>64815</b>	<b>86873</b>	<b>2960</b>	<b>14847</b>	<b>198010</b>

All figures in percentages

Source: Primary Survey

Trends in different types of rooms indicate the following trends across zones

- In the Double Bed category, East, West and South lead the fray with no. of rooms in the category exceeding the national average.
- In the Single Bed category Central, West and South lead the fray with no. of rooms in the category exceeding the national average.
- In the Superior Room category, North, West and Central lead the fray with no. of rooms in the category exceeding the national average.
- In the Deluxe/ Luxury category, North, Central and North East lead the fray with no. of rooms in the category exceeding the national average.
- In the Deluxe room with balcony and Suite categories, North and North East lead the fray with no. of rooms in the category exceeding the national average.
- In the Executive Room category, except East and West all other zones lead the fray with no. of rooms in the category exceeding the national average.
- In the double sharing category, East, West and North East zones have reported relatively higher representation of rooms compared to the other zones and the national average.
- In the triple sharing category, East and North East zones have reported relatively higher representation of rooms compared to the other zones and the national average.
- In the Family category, North, West and North East zones have reported relatively higher representation of rooms compared to the other zones and the national average.
- In the Dormitory category, West zone has reported relatively higher representation of rooms compared to the other zones and the national average.

The individual zone wise / trends is provided in the Table below

**Table 2. 4** Type of rooms by type of accommodation unit.

Hotel Category	Single Bed - Rooms	Double Bed - Rooms	Superior - Rooms	Deluxe/ Luxury - Rooms	Deluxe room with balcony - Rooms	Suite - Rooms	Executive - Rooms	Triple Sharing - Rooms	Family - Rooms	Dormitory/ Ward - Rooms	Total
<b>5 Star Deluxe</b>	368	1145		1044		1230				0	3787
<b>5 Star</b>	892	2621		3971		1862	654			0	10000
<b>4 Star</b>	1440	4368	1752	2963	728	2182	1295			0	14728
<b>1/2/3 Star</b>	7984	31264	5901	10564	1901	2681	3604	656	260	0	64815

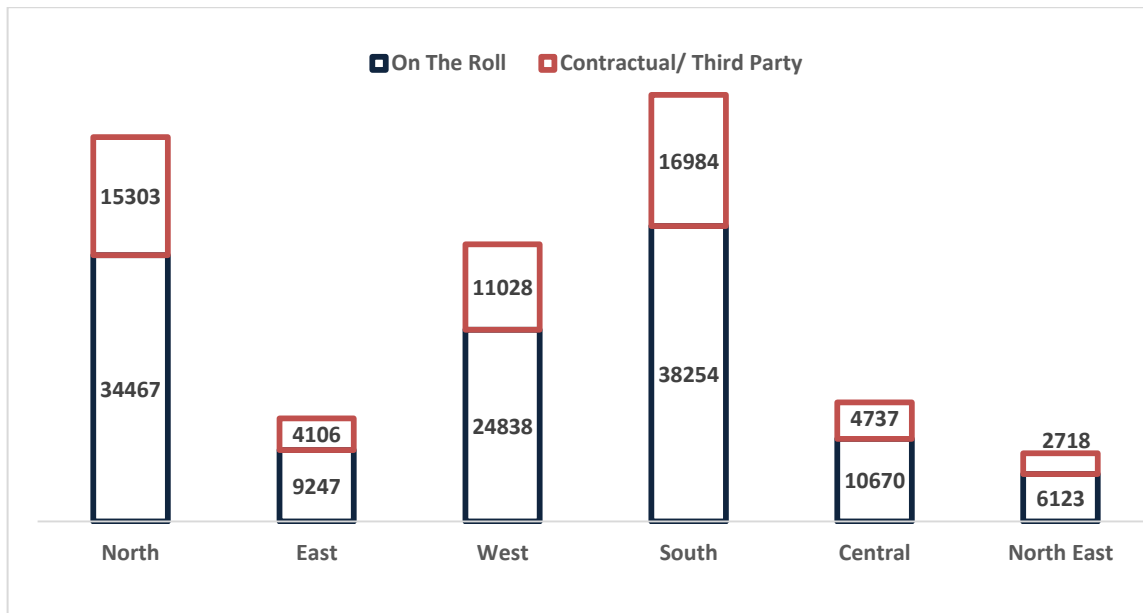
Hotel Category	Single Bed - Rooms	Double Bed - Rooms	Superior - Rooms	Deluxe/ Luxury - Rooms	Deluxe room with balcony - Rooms	Suite - Rooms	Executive - Rooms	Triple Sharing - Rooms	Family - Rooms	Dormitory/ Ward - Rooms	Total
Guest House/Unclassified Hotel	19797	36938	7482	13232	2180		2636	2816	1792	0	86873
Heritage	122	2117	105	320	53		225		18	0	2960
Home Stay/Bed & Breakfast/Gurudwara/Dharamshala	4977	8251	950				410			259	14847
<b>Grand Total</b>	<b>35580</b>	<b>86704</b>	<b>16190</b>	<b>32094</b>	<b>4862</b>	<b>7955</b>	<b>8824</b>	<b>3472</b>	<b>2070</b>	<b>259</b>	<b>198010</b>

#### 2.1.1.6. Manpower deployment at the Zonal Level

The manpower deployed has been discussed in the ensuing paragraphs and has been elucidated in the illustrations below. The total no. of manpower deployed for the sampled units is 178475 as depicted in the chart below.

- The Chart depicts the fact that on the roll manpower still continues to dominate across all zones.
- The ratio of on the roll manpower to contractual/third party is most apart in North East and Central followed by East Zone, wherein more On the roll manpower is deployed
- In South Zone the gap is least, with more deployment of Contractual/Third party manpower compared to that of other zones.
- North and West zones indicate similar trends in deploying on the roll and Contractual/Third party manpower.

**Figure 2. 6** Contractual/Third party and On the roll Manpower deployed in different zones

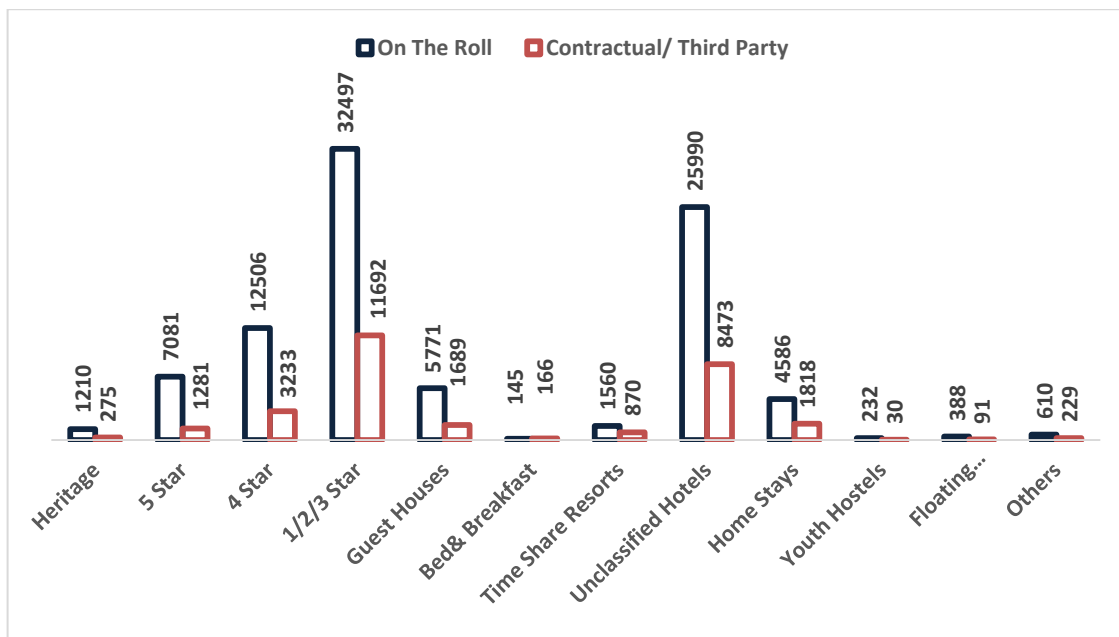


All figures in absolute nos

Source: Primary Survey

### 2.1.1.7. Manpower deployment at the accommodation units of different types

**Figure 2. 7** Manpower deployment at accommodation units



All figures in absolute nos

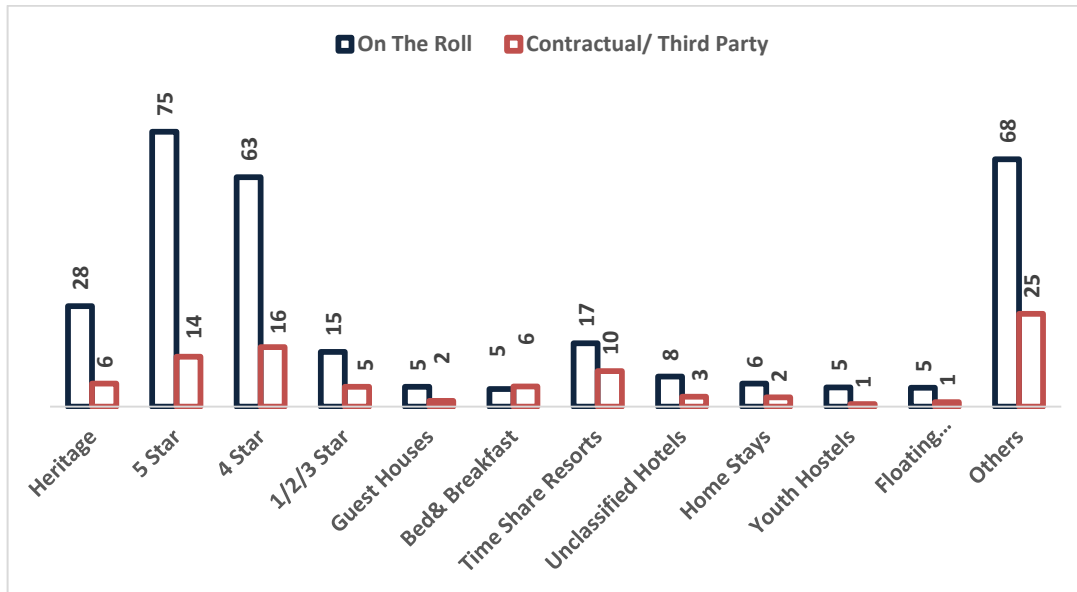
Source: Primary Survey

As depicted in the chart above we find highest no.s of on the roll staffs in 1/2/3 Star hotels and in unclassified hotels.

### 2.1.1.8. Trends in deployment of manpower by Unit establishment

The trends in deployment of on the roll and Contractual/Third party manpower per unit in various accommodation units have been depicted in the Table below.

**Figure 2. 8** Manpower deployment trends by unit establishment



All figures in absolute nos

Source: Nielsen Analysis based on Primary Survey

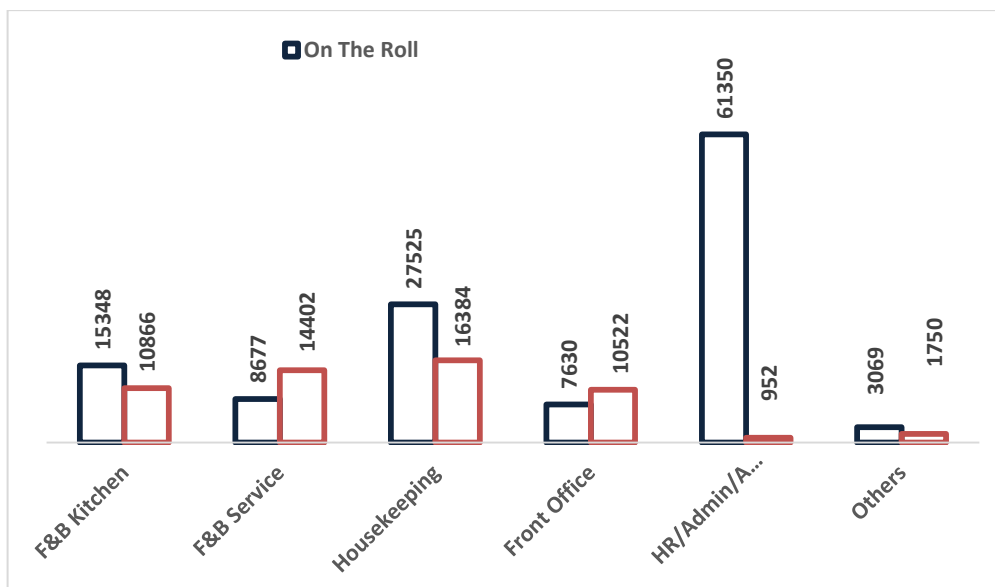
The figure depicts the fact that Heritage, 5 Star and 4 Star units drive the no. of deployment of on the roll staff, which is also the trend in rest of the units. A reverse trend has been observed in the Bed and Breakfast units which deploy marginally higher Contractual/Third party staff compared to that of the on the roll staff.



### 2.1.1.9. Trends in manpower deployment by Departments

The trends in manpower deployment in various accommodation units have been depicted in the figure below.

**Figure 2. 9** Manpower deployment by Departments



All figures in absolute nos

Source: Nielsen Analysis based on Primary Survey

The figure depicts the fact that highest manpower count of manpower is deployed in the Housekeeping/ Front Office compared to the other Departments. The break up by different designations has been provided in the succeeding Table.

**Table 2. 4** Designation wise Manpower – On the roll vs Contractual/Third party

Designation	On the roll	Contractual/Third party
General Manager / Manager	987	
Executive Chef	1229	111
Sous chef	1694	228
Chef	3635	665
Line cook	3986	1351
Assistant Staff	1846	5055
Others (dishwasher, etc.)	1971	3456
<b>Total F&amp;B KITCHEN</b>	<b>15348</b>	<b>10866</b>
Head	490	107
Restaurant Manager	1420	129
Banquet Manager	463	78

Designation	On the roll	Contractual/Third party
Bartender	932	129
Waiter/ Server	3228	8675
Room Service	1831	4855
Other	313	429
<b>Total F &amp; B SERVICE</b>	<b>8677</b>	<b>14402</b>
Manager _On the roll	7466	580
Executive/Supervisor	2907	501
Room Attendants	13314	7029
Bell Boys	1948	3726
Security Manager	538	1853
Transport Manager	14	223
Drivers	402	1319
Other (specify)	936	1153
<b>Total House Keeping</b>	<b>27525</b>	<b>16384</b>
Receptionists	1232	8152
Sales	1181	157
Customer Service	5217	2213
<b>Total Front Office</b>	<b>7630</b>	<b>10522</b>
HR Head/Manager	1375	50
HR Executive	456	227
Admin Head/Executive	621	208
Accounts/Finance Head	1935	377
Purchase	56839	90
Other (specify)	124	0
<b>Total HR/ADMINISTRATION/ACCOUNTS/PURCHASE</b>	<b>61350</b>	<b>952</b>
Public Relations Executive	203	17
Gardening	519	92
Engineer	493	38
Electrician	622	1016
Quality Control	243	37
Plumber/Waterworks	791	515
Other - 1	198	35
<b>Other Ancillary</b>	<b>3069</b>	<b>1750</b>
<b>Total All Designations</b>	<b>123599</b>	<b>54876</b>

## 2.1.1.10. Manpower deployment at the accommodation units by Departments

### 2.1.1.10.1. Food & Beverage Department

The manpower deployment and average salary level indicates the following trends

- On the roll General Managers, Executive chef, Sous Chefs, Line Cooks are highest in no. in the North Zone
- On the roll Chefs and other Assistant Staffs are highest in no. in South Zone

**Table 2. 5** Manpower deployment and average salary level in Food & Beverage Department

Designation	Zone	No. of People		Average Annual salary (in Rs.)	
		On the roll	Contractual/Third party	On the roll	Contractual/Third party
General Manager - F&B	Central	15	0	227364	0
	East	120	5	243925	72000
	North	306	2	165369	65000
	North East	26	0	309333	72000
	South	255	17	392722	143360
	West	206	35	339682	275000
	<b>All India</b>	<b>928</b>	<b>59</b>		
Executive Chef	Central	31	0	209733	0
	East	48	4	320469	0
	North	547	0	159142	146200
	North East	24	42	246667	230000
	South	370	56	360656	90509
	West	209	9	262208	191667
	<b>All India</b>	<b>1229</b>	<b>111</b>		

Designation	Zone	No. of People		Average Annual salary (in Rs.)	
		On the roll	Contractual/Third party	On the roll	Contractual/Third party
Sous Chef	Central	29	0	179048	0
	East	47	0	216333	0
	North	728	20	128316	64462
	North East	63	33	148607	226000
	South	445	367	255049	51372
	West	182	8	181827	140000
	<b>All India</b>	<b>1494</b>	<b>428</b>		

Designation	Zone	No. of People		Average Annual salary (in Rs.)	
Chef	Central	65	0	165723	0
	East	334	12	116094	204000
	North	840	69	121948	77429
	North East	288	21	102458	153000
	South	1540	520	245756	64279
	West	568	43	158829	103667
	<b>All India</b>	<b>3635</b>	<b>665</b>		
Line Cook	Central	62	10	141118	79000
	East	701	59	100060	86429
	North	1370	578	74287	33902
	North East	421	0	78597	0
	South	1037	529	184321	121581
	West	395	175	133813	139061
	<b>All India</b>	<b>3986</b>	<b>1351</b>		
Assistant Staff	Central	90	15	113229	70692
	East	713	91	61967	66342
	North	1301	552	94554	34292
	North East	835	39	87734	113333
	South	1628	944	149419	126482
	West	488	205	112541	110635
	<b>All India</b>	<b>5055</b>	<b>1846</b>		
Others (Dishwasher etc.)	Central	76	29	87067	54278
	East	506	119	51190	47664
	North	1101	718	61238	43349
	North East	511	60	54566	97500
	South	791	763	114786	114602
	West	471	282	82113	76198
	<b>All India</b>	<b>3456</b>	<b>1971</b>		

### 2.1.1.10.2. Food & Beverage Service Department

The manpower deployment and average salary level in F&B Service Departments indicated the following trends

- Restaurant Manager, Bartender, Waiter/ Server, Room Service personnel are highest in no. in the North Zone
- F&B Service Head, Banquet Manager and other Assistant Staffs are highest in no. in South Zone

**Table 2. 6** Manpower deployment and average salary level in Food & Beverage Department

Designation	Zone	No. of People		Average Annual salary (in Rs.)	
		On the roll	Contractual/Third party	On the roll	Contractual/Third party
F&B Service Head	Central	20	0	156545	0
	East	14	4	278889	204000
	North	100	0	154584	0
	North East	43	18	179206	186000
	South	225	84	260832	16012
	West	88	1	276026	190000
	<b>All India</b>	<b>490</b>	<b>107</b>		
Restaurant Manager	Central	11	0	215818	0
	East	99	4	141675	0
	North	547	46	98218	20071
	North East	118	9	120778	162000
	South	323	57	270107	50222
	West	322	13	207568	164250
	<b>All India</b>	<b>1420</b>	<b>129</b>		
Banquet Manager	Central	6	0	141667	0
	East	32	0	184762	0
	North	116	7	55828	17429
	North East	50	6	128711	180000
	South	159	49	249615	86556
	West	100	16	205149	160417
	<b>All India</b>	<b>463</b>	<b>78</b>		
Bartender	Central	14	4	93615	75750
	East	70	0	82813	0
	North	277	29	111907	13364
	North East	133	18	57553	132000
	South	199	46	193605	165667

Designation	Zone	No. of People		Average Annual salary (in Rs.)	
	West	239	32	136635	103182
	<b>All India</b>	<b>932</b>	<b>129</b>		
Designation	Zone	No. of People		Average Annual salary (in Rs.)	
		On the roll	Contractual/Third party	On the roll	Contractual/Third party
Waiter/ Server	Central	144	19	94163	72000
	East	1111	68	66944	73917
	North	2435	922	79492	34953
	North East	1089	6	71105	116000
	South	2310	1722	135869	85984
	West	1586	491	102342	84924
	<b>All India</b>	<b>8675</b>	<b>3228</b>		
Room Service	Central	77	36	79432	69895
	East	719	90	77679	60212
	North	1306	416	79586	18859
	North East	444	0	102543	96000
	South	1534	1080	122641	95324
	West	775	209	86922	82467
	<b>All India</b>	<b>4855</b>	<b>1831</b>		
Others	Central	0	4	0	72000
	East	86	4	105500	120000
	North	245	126	37624	28769
	North East	0	0	0	0
	South	83	140	130500	120860
	West	15	34	81600	78000
	<b>All India</b>	<b>429</b>	<b>308</b>		

### 2.1.1.10.3. House Keeping & Front Office Department

The manpower deployment and average salary level in Housekeeping and Front Office Department indicated the following trends

- North Zone leads the fray in most posts with South leading the fray with regard to Room Attendants, Transport Manager and Other posts of House Keeping and Front Office Departments.

**Table 2. 7** Manpower deployment and average salary level in Housekeeping & Front Office Department

Designation	Zone	No. of People		Average Annual salary (in Rs.)	
		On the roll	Contractual/Third party	On the roll	Contractual/Third party
Housekeeping/ Front Office	Central	327	1	270917	120000
	East	652	15	134579	86455
	North	3453	105	152754	143750
	North East	203	9	144123	156000
	South	1110	419	248243	54833
	West	1721	31	199797	145316
	<b>All India</b>	<b>7466</b>	<b>580</b>		
Manager	Central	49	0	108531	0
	East	353	7	87014	72857
	North	1002	76	149291	52186
	North East	164	12	69027	120000
	South	830	327	185889	86679
	West	509	79	193434	113438
	<b>All India</b>	<b>2907</b>	<b>501</b>		
Executive Supervisor	Central	511	64	127370	80516
	East	1504	982	65002	65461
	North	4139	2220	95962	72515
	North East	1181	12	77019	120000
	South	3123	2492	131372	65675
	West	2851	1255	98440	84468
	<b>All India</b>	<b>13309</b>	<b>7025</b>		
Room Attendants	Central	168	7	109677	81571
	East	1044	94	82927	64691
	North	1898	178	89673	17217
	North East	730	9	87139	150000
	South	1678	709	167926	61931

Designation	Zone	No. of People		Average Annual salary (in Rs.)	
	West	2630	235	129339	117496
	<b>All India</b>	<b>8148</b>	<b>1232</b>		
Receptionist	Central	3	0	156000	0
	East	100	21	124595	101667
	North	503	103	141994	113667
	North East	36	0	170500	0
	South	364	19	168229	135600
	West	175	14	133708	137500
	<b>All India</b>	<b>1181</b>	<b>157</b>		

Designation	Zone	No. of People		Average Annual salary (in Rs.)	
		On the roll	Contractual /Third party	On the roll	Contractual/Third party
Sales	Central	29	0	86667	0
	East	228	66	54923	102909
	North	2834	826	120761	59543
	North East	30	12	167333	150000
	South	690	343	148133	121675
	West	1390	966	99909	91157
	<b>All India</b>	<b>5201</b>	<b>2213</b>		
Customer Service	Central	1	0	100000	0
	East	332	53	34981	42447
	North	1149	523	76294	23552
	North East	468	9	78213	120000
	South	1136	535	110010	119810
	West	620	828	99022	81630
	<b>All India</b>	<b>3706</b>	<b>1948</b>		
Bell Boys	Central	154	2	150281	0
	East	117	16	45547	80357
	North	538	263	110130	45356
	North East	115	9	77031	132000
	South	434	133	145531	127950
	West	491	115	110383	98881
	<b>All India</b>	<b>1849</b>	<b>538</b>		
Security Manager	Central	0	0	0	0
	East	4	0	0	0
	North	110	0	46086	16000
	North East	18	0	156000	0



Designation	Zone	No. of People		Average Annual salary (in Rs.)	
	South	74	8	154029	112500
	West	15	6	140769	114000
	<b>All India</b>	<b>221</b>	<b>14</b>		
Transport Manager	Central	12	1	130833	90000
	East	111	7	109907	75600
	North	378	95	130117	21844
	North East	90	3	147789	144000
	South	467	147	167481	168780
	West	261	149	110986	111483
	<b>All India</b>	<b>1319</b>	<b>402</b>		

Designation	Zone	No. of People		Average Annual salary (in Rs.)	
		On the roll	Contractual /Third party	On the roll	Contractual/Third party
Drivers	Central	36	122	51688	56667
	East	322	242	75760	52593
	North	445	131	95614	45551
	North East	21	0	0	0
	South	34	73	128950	100884
	West	49	567	76760	71181
	<b>All India</b>	<b>907</b>	<b>1135</b>		
Others in Housekeeping/ Front Office Department	Central	15	0	243167	0
	East	136	32	161270	85000
	North	373	0	182732	205600
	North East	118	3	234464	250000
	South	274	6	274858	16500
	West	455	9	296832	179500
	<b>All India</b>	<b>1371</b>	<b>50</b>		

#### 2.1.1.10.4. HR Administration, Accounts and Purchase

The manpower deployment and average salary level in HR, Administration, Accounts and Purchase Departments have indicated the following trends

- North Zone leads the fray in most posts with the exception of East Zone where deployment in purchase function is the highest.

**Table 2. 8** Manpower deployment and average salary level in HR Administration, Accounts & Purchase

Designation	Zone	No. of People		Average Annual salary (in Rs.)	
		On the roll	Contractual/Third party	On the roll	Contractual/Third party
HR Head/ Manager	Central	5	0	180000	0
	East	37	0	191655	0
	North	273	2	184750	105000
	North East	44	0	59029	0
	South	197	21	213766	106567
	West	100	4	273139	218333
	<b>All India</b>	<b>656</b>	<b>27</b>		
HR Executive	Central	34	0	213913	0
	East	218	0	145418	60000
	North	232	7	175409	186000
	North East	50	0	159897	0
	South	167	0	239113	0
	West	120	1	255354	175000
	<b>All India</b>	<b>821</b>	<b>8</b>		
Admin Executive	Central	28	0	149650	0
	East	262	14	144385	91500
	North	552	10	161990	14000
	North East	219	32	125462	132000
	South	234	297	194314	27748
	West	640	24	148116	101250
	<b>All India</b>	<b>1935</b>	<b>377</b>		
Accounts/ Finance Head	Central	9	1	115111	70000
	East	136	26	109933	56462
	North	271	20	147728	52091
	North East	78	16	101235	172000
	South	124	12	188156	144000
	West	221	15	120834	93267
	<b>All India</b>	<b>839</b>	<b>90</b>		

Designation	Zone	No. of People		Average Annual salary (in Rs.)	
		On the roll	Contractual/Third party	On the roll	Contractual/Third party
Purchase	Central	0	0	0	0
	East	52	0	252500	0
	North	35	0	39304	0
	North East	9	0	84000	0
	South	27	0	70000	0
	West	1	0	200000	0
	<b>All India</b>	<b>124</b>	<b>0</b>		
Other (Finance/ Admin/ HR)	Central	0	0	0	0
	East	4	0	140000	0
	North	91	2	91891	20000
	North East	9	3	165000	130000
	South	62	0	70000	0
	West	37	1	200000	0
	<b>All India</b>	<b>203</b>	<b>6</b>		

#### 2.1.1.10.5. Other Ancillary Functions

The manpower deployment and average salary level in Housekeeping and Front Office Department indicated the following trends

- North Zone leads the fray in most posts with the exception of South Zone where deployment in PR function is highest.

**Table 2. 9** Manpower deployment and average salary level in HR Administration, Accounts & Purchase

Designation	Zone	No. of People		Average Annual salary (in Rs.)	
		On the roll	Contractual /Third party	On the roll	Contractual/Third party
PR Executive	Central	0	0	0	0
	East	27	1	62750	61250
	North	182	24	67935	33238
	North East	70	32	104400	67385
	South	193	23	139682	233273
	West	47	12	115130	86667
	<b>All India</b>	<b>519</b>	<b>92</b>		

Designation	Zone	No. of People		Average Annual salary (in Rs.)	
		On the roll	Contractual/Third party	On the roll	Contractual/Third party
Gardener	Central	3	0	180000	0
	East	30	0	182000	0
	North	248	0	135438	0
	North East	36	12	120000	102000
	South	129	3	200068	28000
	West	47	23	177361	107308
	<b>All India</b>	<b>493</b>	<b>38</b>		
Engineer	Central	27	6	95200	70000
	East	156	24	96639	61250
	North	387	124	101591	70790
	North East	66	20	110788	70154
	South	374	108	146676	158035
	West	112	234	105029	82927
	<b>All India</b>	<b>1122</b>	<b>516</b>		
Electrician	Central	6	0	86167	0
	East	33	5	163750	70000
	North	111	7	86188	15000
	North East	0	0	0	0
	South	66	15	156833	123400
	West	27	10	150789	110833
	<b>All India</b>	<b>243</b>	<b>37</b>		
Quality Control	Central	11	0	86364	0
	East	82	15	90571	91429
	North	290	118	83511	51628
	North East	69	18	108500	71333
	South	216	77	155200	130336
	West	123	287	97606	76104
	<b>All India</b>	<b>791</b>	<b>515</b>		
Plumber/ Waterworks	Central	3	0	144000	0
	East	71	20	90421	81000
	North	67	71	89545	78857
	North East	0	0	0	0
	South	12	9	96000	160000
	West	45	5	120000	82333
	<b>All India</b>	<b>198</b>	<b>105</b>		

## 2.1.1.11. Investment Required in terms of Employees and Rooms in Accommodation Units

### 2.1.1.11.1. Rooms and Seats to be added

The following table suggests how rooms and seats are going to be added in Accommodation Units as per the inputs of the surveyed sample accommodation units in the 66 locations under study in the years over 2019 to 2025.

**Table 2. 10 Rooms planned to be added in accommodation units (2019-2025)**

Zone	Rooms to be added - 2019	Rooms to be added - 2020	Rooms to be added - 2021	Rooms to be added - 2022	Rooms to be added - 2023	Rooms to be added - 2024	Rooms to be added - 2025
Central	132	34	141	141	156	156	159
East	100	313	489	468	20	80	22
North	266	216	290	312	336	371	390
North East	0	24	74	0	0	0	0
South	103	169	329	453	127	231	205
West	188	312	462	193	194	192	527
<b>Grand Total</b>	789	1068	1785	1567	833	1030	1303

**Table 2. 11 Seats planned to be added in accommodation units (2019-2025)**

Zone	Seats to be added- 2019	Seats to be added- 2020	Seats to be added- 2021	Seats to be added- 2022	Seats to be added- 2023	Seats to be added- 2024	Seats to be added- 2025
Central	18	18	18	18	18	18	19
East	4	3	11	0	0	0	0
North	2	5	2	3	2	4	4
North East	0	10	0	0	0	0	0
South	11	10	8	12	4	3	4
West	60	7	13	48	49	12	60
<b>Grand Total</b>	95	52	52	81	72	37	87

### 2.1.1.11.2. Employees to be added in Accommodation Units

The following table suggests how employees are planned to be added in Accommodation Units as per the inputs of the surveyed sample accommodation units in the 66 locations under study in the years over 2019 to 2025 to bridge the gap for the planned investment in rooms and seats, for both on the roll as well as Contractual/Third party employees.

**Table 2. 12 On the roll Employees planned to be added in accommodation units (2019-2025)**

Zone	Employees to be added - On the roll- 2019	Employees to be added - On the roll- 2020	Employees to be added - On the roll- 2021	Employees to be added - On the roll- 2022	Employees to be added - On the roll- 2023	Employees to be added - On the roll- 2024	Employees to be added - On the roll- 2025
Central	243	1113	79	1187	1096	205	244
East	264	93	560	484	635	556	0
North	907	2056	868	2253	1016	1695	822
North East		195	65	0	160	0	0
South	1665	323	1269	24	832	423	34
West	892	165	1197	83	583	503	83
<b>Grand Total</b>	<b>3971</b>	<b>3945</b>	<b>4048</b>	<b>4031</b>	<b>4322</b>	<b>3382</b>	<b>1183</b>

**Table 2. 13 Contractual/Third party Employees planned to be added in accommodation units (2019-2025)**

Zone	Employees to be added - Contractual/Third party- 2019	Employees to be added - Contractual/Third party- 2020	Employees to be added - Contractual/Third party- 2021	Employees to be added - Contractual/Third party- 2022	Employees to be added - Contractual/Third party- 2023	Employees to be added - Contractual/Third party- 2024	Employees to be added - Contractual/Third party- 2025
Central	74	68	72	72	78	78	78
East	29	47	49	144	0	0	0
North	55	38	0	10	20	44	86
North East	0	0	0	0	0	0	0
South	1201	667	700	196	326	161	281
West	44	73	42	166	53	53	57
<b>Grand Total</b>	<b>1403</b>	<b>893</b>	<b>863</b>	<b>588</b>	<b>477</b>	<b>336</b>	<b>502</b>

### 2.1.1.12. Investment Required in Accommodation Units

The planned investment required in accommodation units in the future (2019-2025) as reported from the study under the 66 locations covered has been provided below:

**Table 2. 14 Total Investment Required in Accommodation Units in the planned future (2019-2025)**

Zone	Total Investment in 2019 (in Crores)	Total Investment in 2020 (in Crores)	Total Investment in 2021 (in Crores)	Total Investment in 2022 (in Crores)	Total Investment in 2023 (in Crores)	Total Investment in 2024 (in Crores)	Total Investment in 2025 (in Crores)
Central	23.29	6	24.88	24.88	27.53	27.53	28.06
East	15.95	49.92	77.99	73.24	3.19	12.76	3.44
North	49.60	40.28	54.08	58.18	62.66	69.19	72.73
North East		4.70	14.54	0	0	0	0
South	19.20	31.51	61.35	84.48	23.68	43.08	38.23
West	33.18	55.06	81.54	34.06	34.24	33.88	93.01
<b>Grand Total</b>	<b>144.24</b>	<b>187.51</b>	<b>314.40</b>	<b>274.86</b>	<b>151.31</b>	<b>186.45</b>	<b>235.48</b>

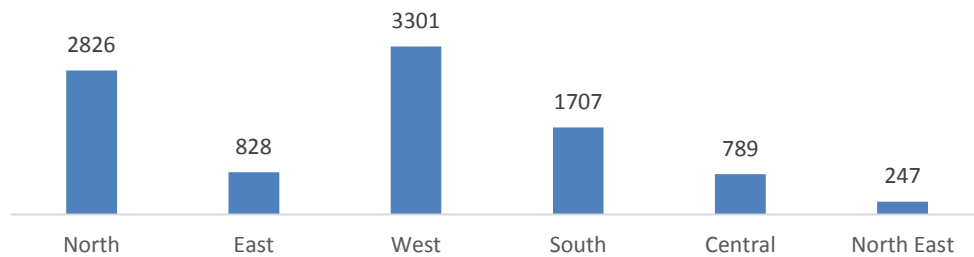
## 2.1.2. Restaurants

### 2.1.2.1. Profiling of the Units

The study mandated for coverage of total 10000 restaurant/ eating units with 10 or more seats. 9698 restaurants were covered in the 66 locations under study and 720 dhabas/ restaurants (with 10 or more seats) on the 5 selected National Highways were covered for primary survey data collection. Hence in total, 10418 total eating units with 10 or more seats in both city limits and on National Highways were covered for data collection exercise.

The findings from the Restaurants have been depicted in the following sections:

**Figure 2. 10** Zonal Distribution of No. of Sampled Restaurants

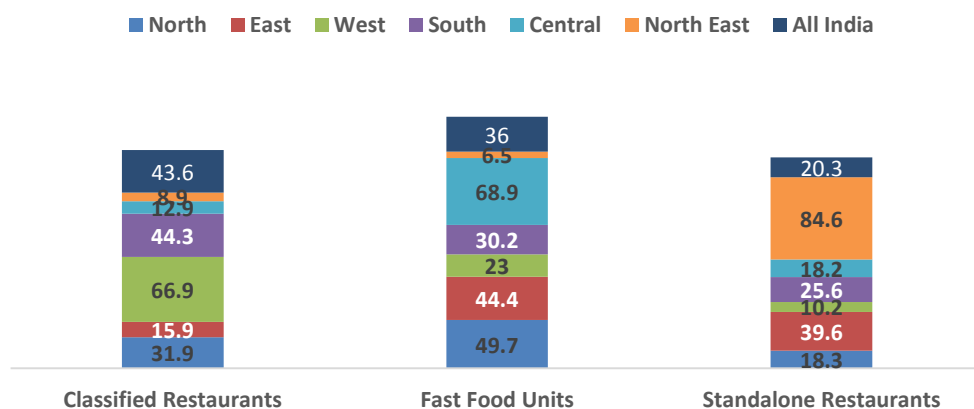


All figures in percentages

Source: Primary Survey

As discernible from the figure above, North and West had the highest representations followed by West and East. Central and North East had equitable representations

**Figure 2. 11** Zonal Distribution of type of sampled restaurants



All figures in percentages

Source: Primary Survey



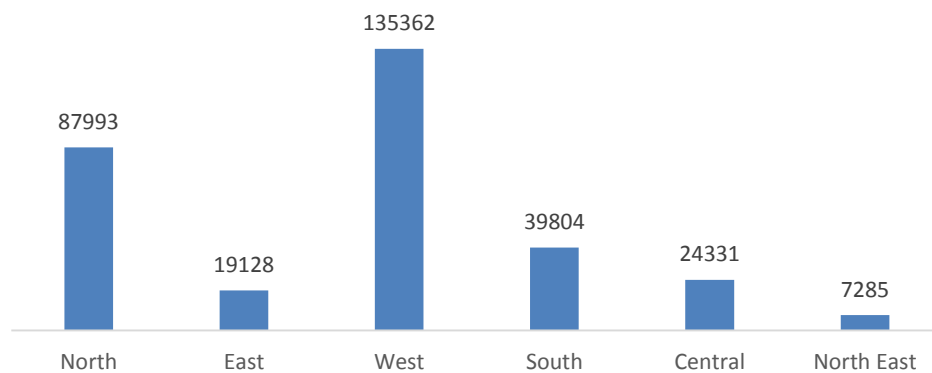
As discernible from the figure above, Fast food units have the highest representation amongst the sampled geography. The following aspects were also observed:-

- West Zone had the highest population of classified restaurants
- Central had the highest proportion of Fast food outlets
- In North East, understandably enough, had the highest representation of standalone restaurants compared to the other zones
- Motels had minimal representation in the entire gamut of restaurants.

### 2.1.2.2. No. of Seats

The total no of Seats in the sampled restaurants were 313903, with the zonal representations as elucidated in the chart below:-

**Figure 2. 12** Zonal Distribution of No. of Seats



*All figures in absolute nos.*

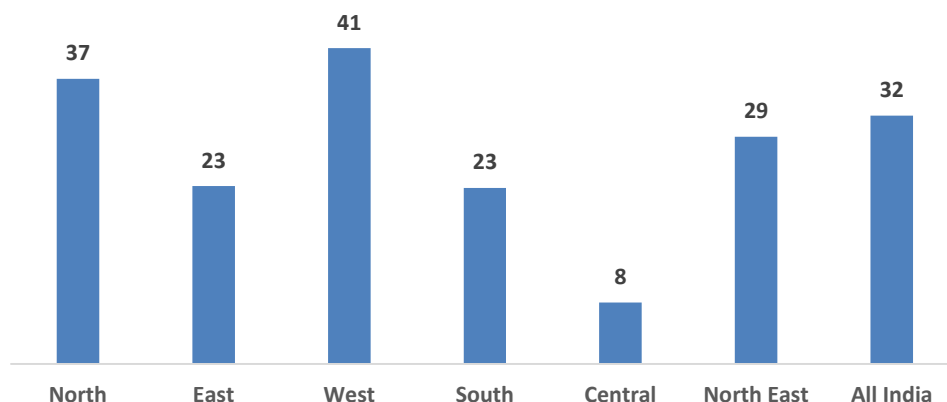
*Source: Primary Survey*

A deep dive into geographical diversity indicates the fact that West has the maximum no. of seats compared to the other regions. With almost equal no. of restaurants in the North, the restaurants in the West has demonstrated increasing trend of maximization of profit from a particular seat. This explains the reason behind 28% more seats with almost similar universe.

### 2.1.2.3. No. of Seats/ Unit Establishment

The total no of Seats per unit establishment in the sampled restaurants were 313903, with the zonal representations as elucidated in the chart below: -

**Figure 2. 13** Zonal Distribution of No. of Seats/ Unit establishment



All figures in absolute nos.

Source: Primary Survey

The findings reiterate the insights shared in the point 2.1.2.2 and depicted therein.

### 2.1.2.4. Zonal distribution of No. of Seats/ Unit Establishment

The zonal distribution of no. of Seats per unit establishment in the sampled restaurants has been elucidated in the table below: -

**Table 2. 15** Zonal Distribution of No. of Seats/ Unit establishment

Zones	Classified Restaurants	Fast Food Units	Standalone Restaurants/ Sweet Shops	Motels & Restaurants on Highways
North	34	32	25	
East	45	27	10	
West	46	35	21	48
South	24	23	21	
Central	34	28	22	
North East	49	54	25	29

All figures in absolute nos.

Source: Nielsen Analysis based Primary Survey

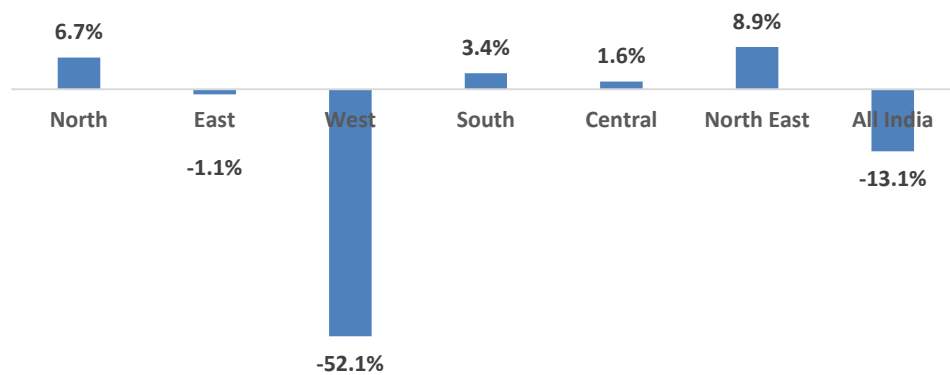
The analysis depicts the following findings across the earmarked zones and units.

- No. of Seats in classified units are relatively higher in East, West and North East
- Fast food units have higher than average nos. in West and North East Zones
- Standalone Restaurants and Sweet shops have higher no. of seats in North, Central and North East Zones.

### 2.1.2.5. Addition of No. of Seats over last 5 years

The zonal disparity in no. of seats added in different restaurants, as reported by the surveyed sample restaurants, has been included in the figure below.

**Figure 2. 14** Zonal Distribution of No. of Seats/ Unit establishment



*All figures in absolute nos.*

*Source: Nielsen Analysis based Primary Survey*

The addition of seats in restaurants has been a little subdued over last 5 years. The following observations can thus be observed.

- Additions to the capacity have suffered at All India level predominantly due to de-growth in East zone and West.
  - In East, the de-growth can be attributed to de-growth in the standalone restaurant/ segments
  - In West, de-growth can be attributed to decline in all the segments.
- Modest capacity additions observed in South and Central zones
  - In South Zone, the growth is predominantly driven by standalone restaurants/ sweet shops, which has grown in leaps and bounds.
  - In Central Zone, Fast food Units and Standalone Restaurants drive growth
- Higher growth rates in capacity additions observed in North and North East Regions
  - In North Fast food restaurants drive growth

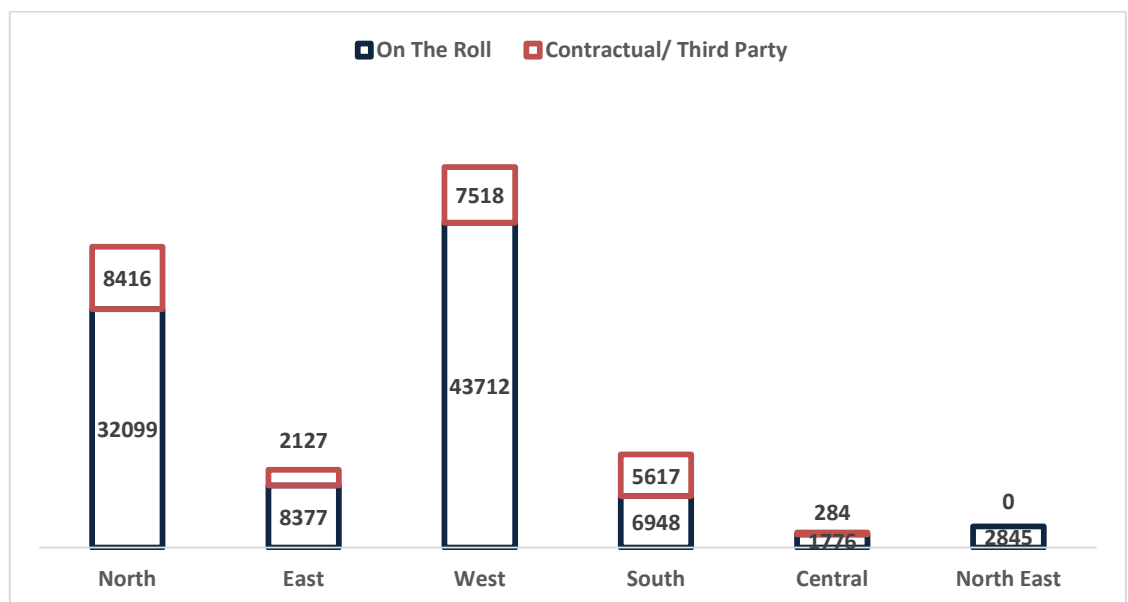
- In North East, there is considerable increase in classified restaurants and standalone units.

### 2.1.2.6. Trends in deployment of manpower

#### 2.1.2.6.1. Overall trends in deployment

The total manpower deployed is 119719. The zonal distribution of deployment of manpower with bifurcation of on the roll and Contractual/Third party resources has been depicted in the chart below.

Figure 2. 15 Deployment Trends in Manpower



All figures in absolute nos.

Source: Nielsen Analysis based Primary Survey

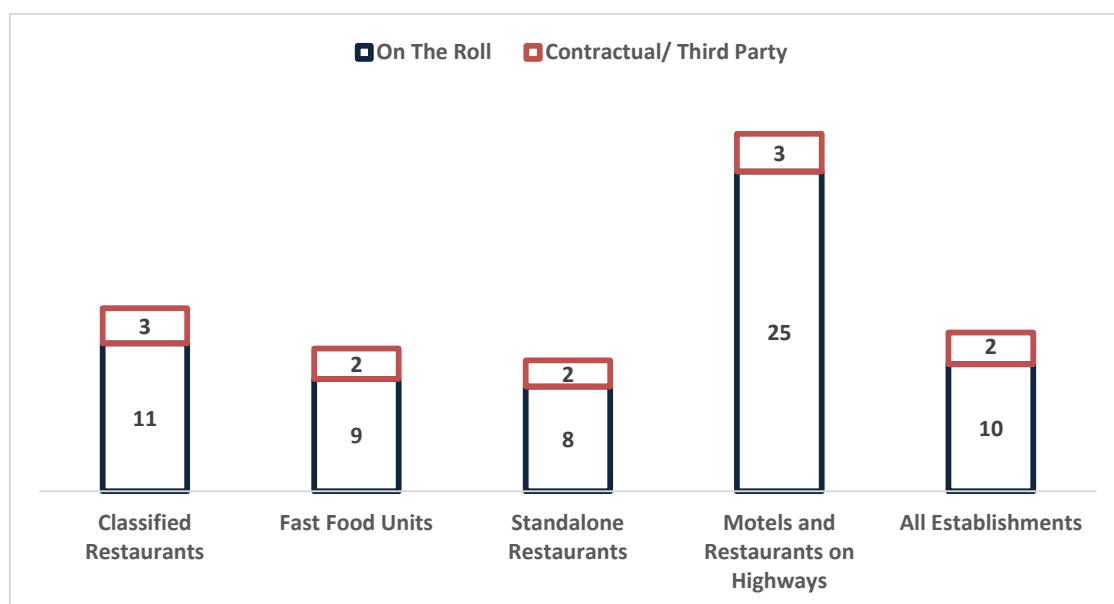
Like accommodation units, manpower distribution is heavily bent towards deployment of on the roll resources than that of the Contractual/Third party ones. The key observations include the following:-

- West and Central zones (Both clocking 14% +) and East and North Zones (both clocking 20% +) have almost similar Contractual/Third party resource deployment compared to rest of the zones.
- South Zone (at 44.7% Contractual/Third party manpower) is slowly inching towards an almost equal representation of On the roll and Contractual/Third party manpower
- In the North East Zone, the entire workforce is on the roll in nature.

### 2.1.2.6.2. Deployment by Type of Unit

A peek at the no. of deployments/ unit establishment indicates the fact that Motels and Restaurants on highways have the highest deployment of manpower. All other establishments have deployment almost at the same level.

**Figure 2. 16** Deployment Trends in Manpower per unit establishment



All figures in absolute nos.

Source: Nielsen Analysis based Primary Survey

### 2.1.2.6.3. Deployment by Designations

The following table indicates the trends in deployment in terms of designation. As indicated above, On the roll positions rule the roost.

**Table 2. 16** Deployment by Designations

Designations	On the roll	Contractual/Third party	Total Employees
General Manager	1841	0	1841
Executive Chef	1513	51	1564
Sous Chef	2696	325	3021
Chef	5707	1024	6731
Line Cook	14224	3362	17586
Assistant Staff	12306	3862	16168
Others (Dishwashers)	7860	4934	12794
<b>Total F&amp;B Kitchen (Xi)</b>	<b>46147</b>	<b>13558</b>	<b>59705</b>

Designations	On the roll	Contractual/Third party	Total Employees
<b>FBK)</b>			
Head (F&B Service)	801	190	991
Restaurant Manager	4343	1054	5397
Banquet Manager	648	6	654
Bar Tender	1367	272	1639
Waiter	20395	13151	33546
Delivery Boys	948	3169	4117
<b>Total F&amp;B Service (Xi FBS)</b>	<b>28502</b>	<b>17842</b>	<b>46344</b>
Manager	2211	63	2274
Supervisor	242	580	822
Security Manager	85	519	604
Cleaning	654	2915	3569
<b>Total Housekeeping (Xi HK)</b>	<b>3192</b>	<b>4077</b>	<b>7269</b>
Telephonic Order Taker	127	1229	1356
Customer Service	1302	155	1457
Front Office	45	617	662
<b>Total Admin (Xi Ad)</b>	<b>1474</b>	<b>2001</b>	<b>3475</b>
HR Head/ Manager	274	11	285
HR Executive	283	0	283
Accounts/ Finance Head	973	35	1008
Purchase	852	39	891
Electrician	230	101	331
Quality Control	93	35	128
<b>Total Others (Xi OSC)</b>	<b>2705</b>	<b>221</b>	<b>2926</b>
<b>Total All Designations</b>	<b>82020</b>	<b>37699</b>	<b>119719</b>

All figures in absolute nos.

Source: Primary Survey

The function wise Manpower employed at present in the interviewed restaurants were basically belonging to 3 types of categories, as reported by the establishments, are formally trained, on the job trained and untrained. The manpower deployment function wise and training category wise for the 9698 restaurants is provided below.

**Table 2. 17 Function wise manpower for different level of training**

Function Wise Manpower-Sample	Formally Trained	On The Job Trained	Untrained	Total
F&B KIT	30743	16168	12794	59705
F&B SERVICE	8681	33546	4117	46344
HOUSE KEEPING	3096		4173	7269
ADMIN	1356	2119		3475
OTHERS	2643	283		2926
<b>TOTAL</b>	<b>46519</b>	<b>52116</b>	<b>21084</b>	<b>119719</b>

It can be seen from the above table that around 18% of the manpower employed currently are untrained and are usually employed in designations like dishwasher, cleaner, etc. in the restaurants. 43% of the current manpower is trained on the job and only 39% of the employed manpower are formally trained and from hospitality institutes.

#### 2.1.2.7. Investment Required in terms of Employees and Seats

##### 2.1.2.7.1. Seats to be added

The following table suggests how seats are going to be added in Restaurants as per the surveyed sample restaurants in the 66 locations under study in the years over 2019 to 2025.

**Table 2. 18 Seats planned to be added in Restaurants (2019-2025)**

Zone	Seats to be added - 2019	Seats to be added - 2020	Seats to be added - 2021	Seats to be added - 2022	Seats to be added - 2023	Seats to be added - 2024	Seats to be added - 2025
Central	50	44	51	52	52	53	53
East	15	30	17	11	10	11	16
North	36	70	41	50	40	52	52
North East	0	15	0	0	0	0	0
South	5	30	25	17	15	16	15
West	26	29	20	23	21	22	22
<b>Grand Total</b>	<b>132</b>	<b>219</b>	<b>153</b>	<b>153</b>	<b>137</b>	<b>154</b>	<b>159</b>

### 2.1.2.7.2. Employees to be added

The following table suggests how employees should be added in Restaurants as per the surveyed sample restaurants in the 66 locations under study in the years over 2019 to 2025 to bridge the gap for the planned investment in seats, for both on the roll as well as Contractual/Third party employees.

**Table 2. 19 On the roll Employees planned to be added in Restaurants (2019-2025)**

Zone	Employees to be added - On the roll- 2019	Employees to be added - On the roll- 2020	Employees to be added - On the roll- 2021	Employees to be added - On the roll- 2022	Employees to be added - On the roll- 2023	Employees to be added - On the roll- 2024	Employees to be added - On the roll- 2025
Central	996	1006	1033	1066	1066	1072	1072
East	748	1562	59	0	30	42	26
North	1254	1446	1469	1604	1212	2033	2010
North East	0	0	0	0	0	0	0
South	228	466	238	218	222	142	156
West	771	891	637	1160	806	825	522
<b>Grand Total</b>	<b>3997</b>	<b>5371</b>	<b>3436</b>	<b>4048</b>	<b>3336</b>	<b>4114</b>	<b>3786</b>

**Table 2. 20 Contractual/Third party Employees planned to be added in Restaurants (2019-2025)**

Zone	Employees to be added - Contractual /Third party- 2019	Employees to be added - Contractual/Third party- 2020	Employees to be added - Contractual /Third party- 2021	Employees to be added - Contractual /Third party- 2022	Employees to be added - Contractual/Third party- 2023	Employees to be added - Contractual /Third party- 2024	Employees to be added - Contractual /Third party- 2025
Central	74	68	72	72	78	78	78
East	29	47	49	144	0	0	0
North	55	38	0	10	20	44	86
North East	0	0	0	0	0	0	0
South	1201	667	700	196	326	161	281
West	44	73	42	166	53	53	57
<b>Grand Total</b>	<b>1403</b>	<b>893</b>	<b>863</b>	<b>588</b>	<b>477</b>	<b>336</b>	<b>502</b>



### **2.1.2.8 Self-Employment in Hospitality Industry**

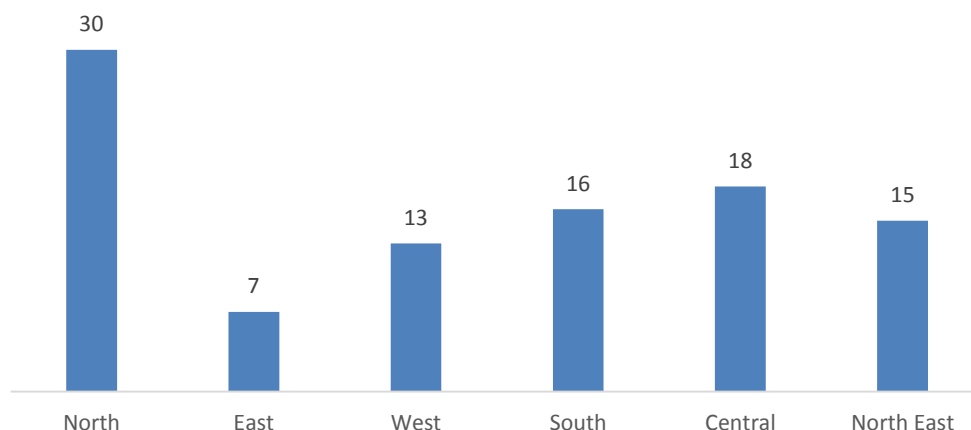
As regards the level of self-employment in the hospitality industry, the same was observed in the Restaurant segment and that too mainly in smaller/non metro cities and in the category of fast Food and cafés. Maximum self-employment was observed during the survey in case of Highway Dhabas. It was also observed to some extent in travel agents/ticketing segment.

### 2.1.3. Tour Operators and Travel Agents

#### 2.1.3.1. Profiling of the Units

The findings from the Tour Operators and Travel Agents have been depicted in the following sections. The total operators covered were 1998.

**Figure 2. 17** Zonal Distribution of No. of Sampled Travel Agents and Operators

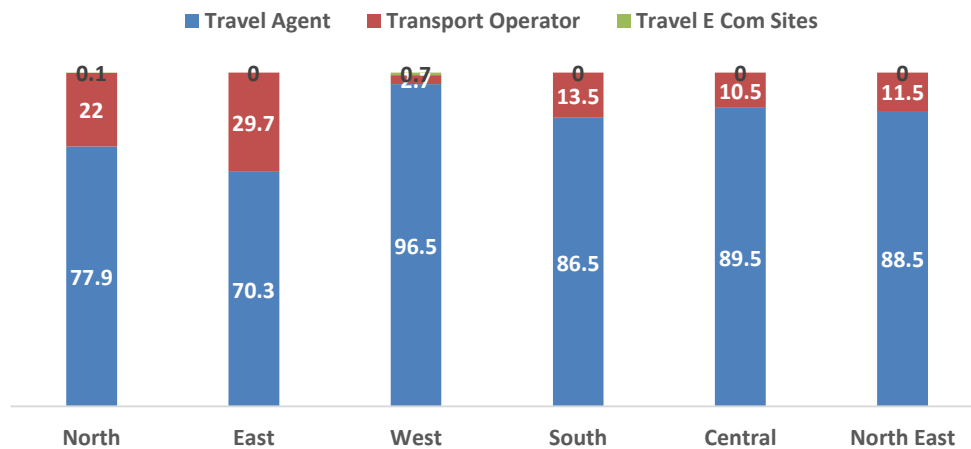


All figures in percentages

Source: Primary Survey

As discernible from the figure above, North has the highest representation followed by Central. This is followed by North East and South at almost similar levels.

**Figure 2. 18** Zonal Distribution of type of business handled

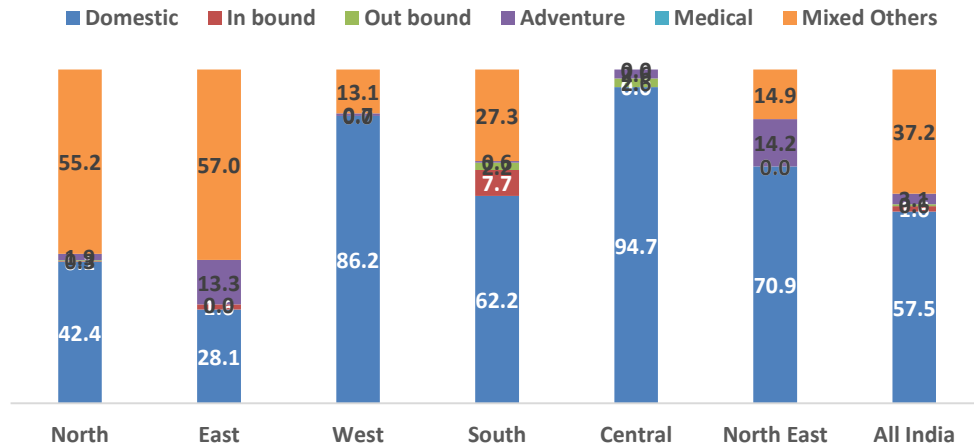


All figures in percentages

Source: Primary Survey

As discernible from the figure above, that West, South, Central and North east had majority of Travel agents. The Transport Operators were more in North and East. Majority of Travel E com Sites were situated in the West.

**Figure 2. 19** Zonal Distribution of nature of business handled



All figures in percentages

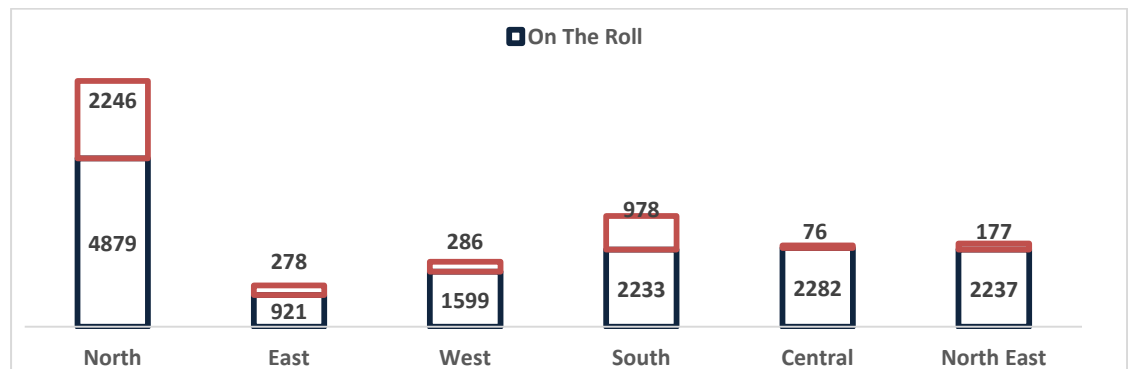
Source: Primary Survey

As discernible from the figure above, that Central, West, South and North East Zone focus predominantly on the domestic trade. North and East Zone witnesses the presence of a lot of travel operators who concentrate on the mixed business methods. Concentration of Travel agents with Adventure tourism profile exists predominantly in the East and North East zones.

**2.1.3.2. Manpower Deployed – On the roll vs. Contractual/Third party**

The manpower deployed in the segment as found in the sample survey has been depicted in the figure below. Like all other segments, On the roll employees still rule the roost with 73.4% belonging to the same category.

**Figure 2. 20** Manpower deployment trends of Sampled Travel Agents and Operators



All figures in absolute nos

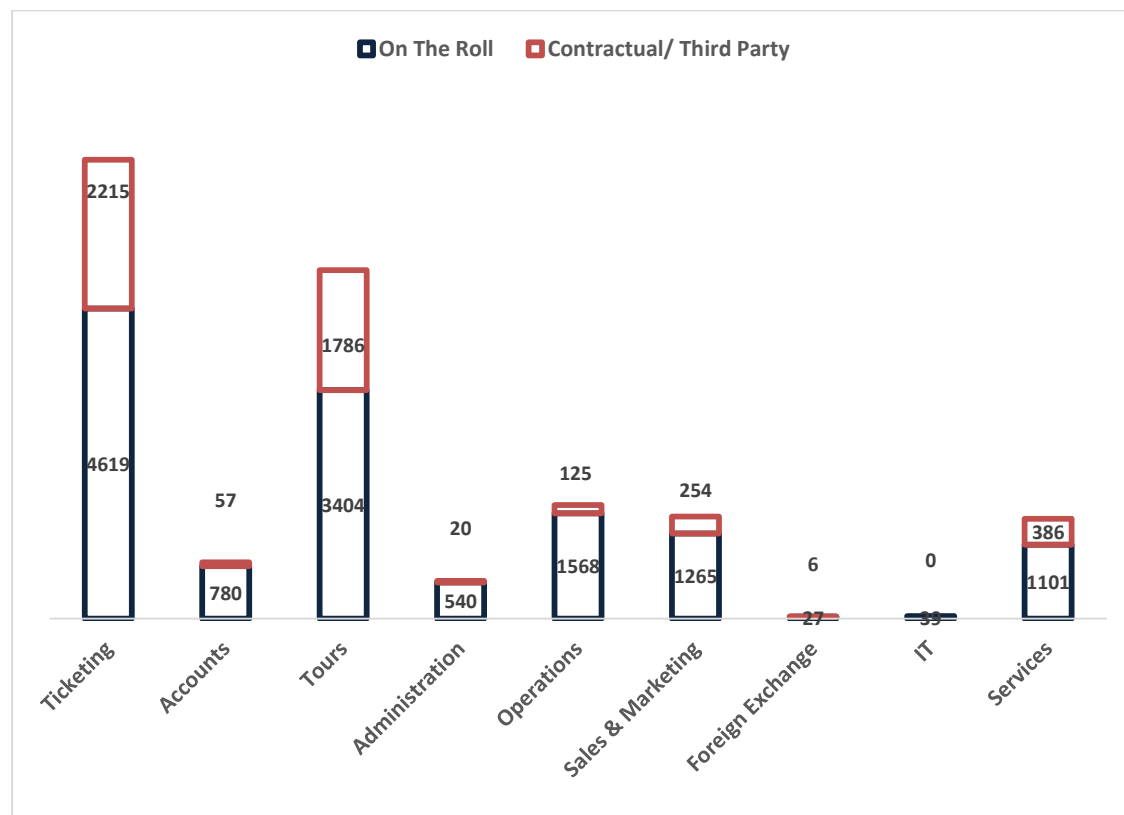
Source: Primary Survey

As discernible from the figure above, North has the highest representation followed by South. South is ahead in terms of Contractual/Third party manpower compared to North East and Central. North East is ahead of Central and West zones in terms of total deployment.

### 2.1.3.3. Manpower Deployed – By Type of Functions

The manpower deployed by type of functions in the segment as found in the sample survey has been depicted in the figure below.

**Figure 2. 21** Manpower deployment trends of Sampled Travel Agents and Operators



All figures in absolute nos.

Source: Primary Survey

As discernible from the figure above, Ticketing and Tours have the maximum deployment of manpower. This is followed by Operations in addition to Sales and Marketing, which is followed by Services. Accounts are the main support function with Foreign exchange and IT following suit.

### 2.1.3.4. Manpower deployed in tours and travel agents – by designations

The manpower deployed by designations as found in the sample survey has been depicted in the figure below.

**Figure 2. 22** Deployment by Designations in Travel Agents and Tour Operators

Designation	On the roll	Contractual/Third party	Total
Branch Manager	2185	119	2305
Marketing Manager	427	17	444
Operations Manager	589	42	631
Team Leader	629	42	670
Travel Counsellor	825	297	1122
Messenger	273	625	898
Sales Manager	345	28	374
Deputy Manager Sales	58	11	69
Executive	1424	198	1623
Ushers	88	13	101
Guide	1922	2164	4086
Drivers	1434	3542	4976
Others	209	685	894
<b>All Designations</b>	<b>10409</b>	<b>7783</b>	<b>18192</b>

*All figures in absolute nos.*

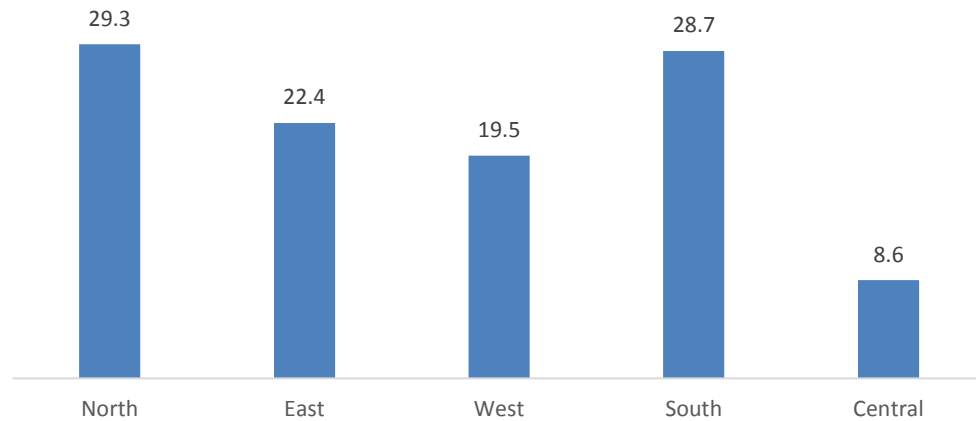
*Source: Primary Survey*

## 2.1.4. Outdoor Banquets

### 2.1.4.1. Profiling of the Units

The findings from the Outdoor Banquets have been depicted in the following sections:

**Figure 2. 23** Zonal Distribution of Outdoor Banquets



All figures in percentages

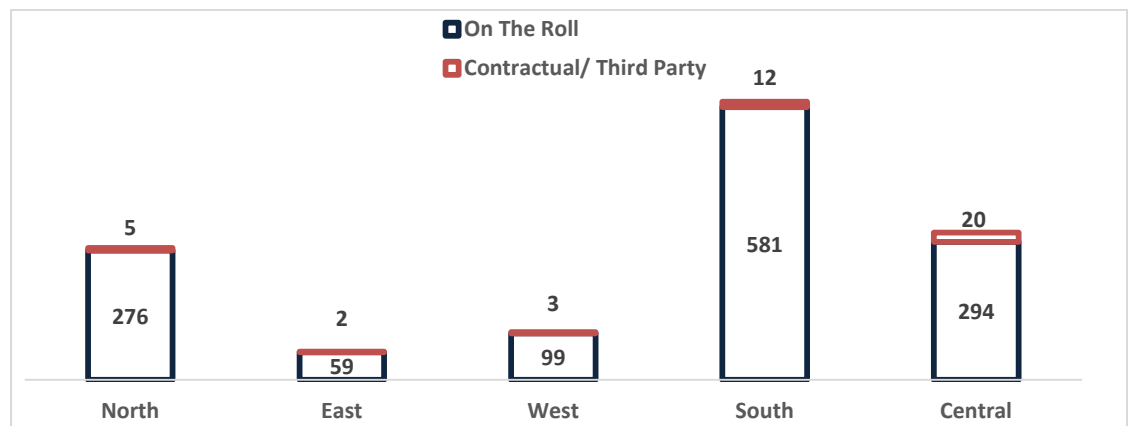
Source: Primary Survey

As discernible from the figure above, North and South have recorded the highest representation followed by East, West and Central Zones respectively.

### 2.1.4.2. Manpower Deployed – On the roll vs. Contractual/Third party

The manpower deployed in the segment as found in the sample survey has been depicted in the figure below. Like all other segments, On the roll employees still rule the roost with 77% belonging to the same category.

**Figure 2. 24** Manpower deployment trends of sampled outdoor banquets



All figures in absolute no.s

Source: Primary Survey

As discernible from the figure above, South Zone has the highest representation followed by both North and Central at an almost equivalent level. East has the lowest deployment.

### 2.1.4.3. Manpower Deployed – By Type of Designations

The manpower deployed by type of designations in the segment as found in the sample survey has been depicted in the figure below.

**Figure 2. 25** Manpower deployment trends of sampled outdoor banquets

Designation	On the roll (Nos.)	Contractual/Third party (Nos.)	Total
Manager (Owner, etc.)	183	38	221
Guest Relations Executive	41	2	44
Assistant	106	47	154
Worker (Sweeper, Cleaner...etc.)	590	165	755
Supervisor	95	0	95
Receptionist	57	5	61
Caterer and Chefs	154	12	165
Security	27	25	52
<b>Total</b>	<b>1253</b>	<b>294</b>	<b>1547</b>

*All figures in absolute nos.*

*Source: Primary Survey*

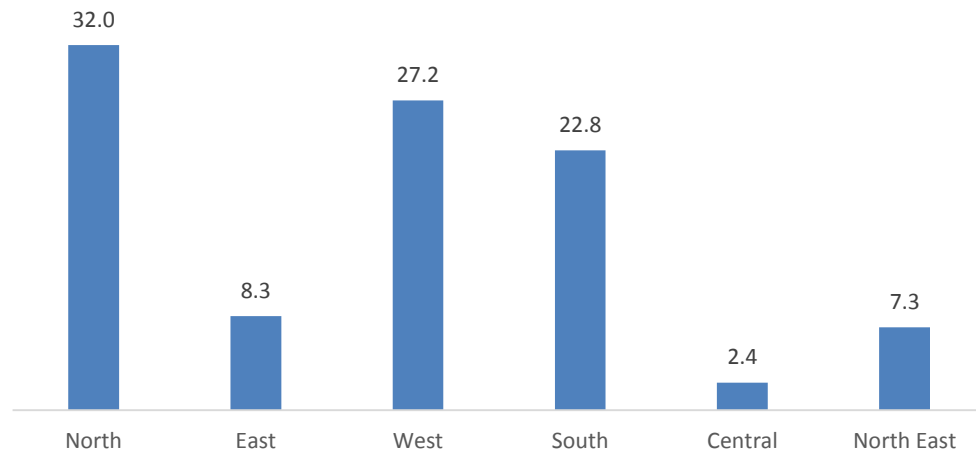
As discernible from the figure above, blue collar workers have the maximum deployment of manpower, most of them being part of the on the roll workforce. This is followed by Managers/ Owners at the helm of affairs in addition to Caterers and Chefs.

## 2.1.5. SPA's

### 2.1.5.1. Profiling of the Units

The findings from the SPA's have been depicted in the following sections:

**Figure 2. 26** Zonal Distribution of SPA's



*All figures in percentages*

*Source: Primary Survey*

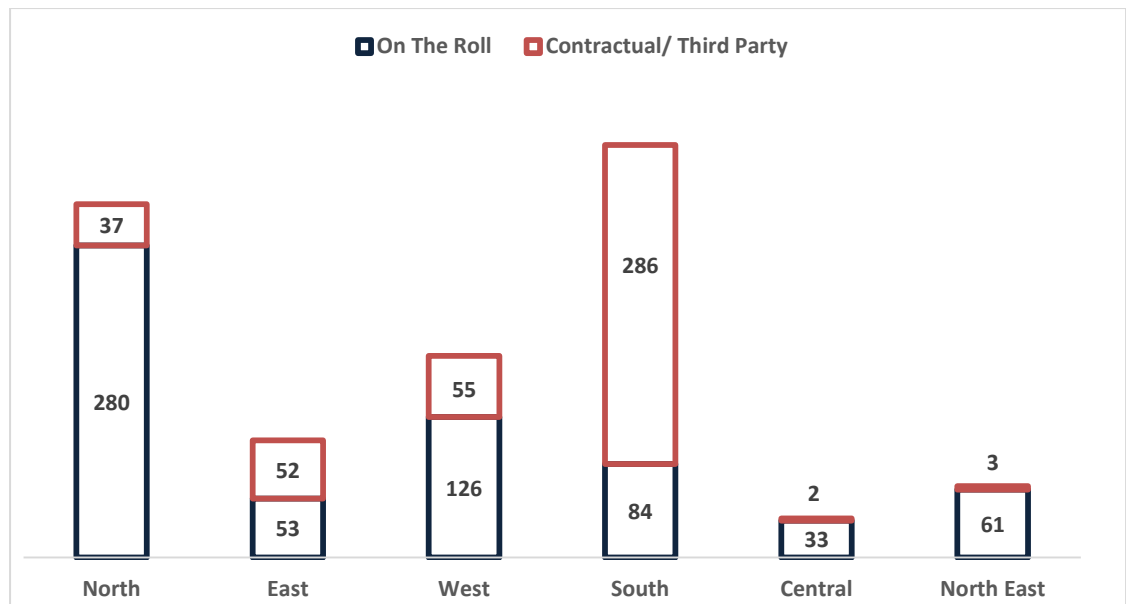
As discernible from the figure above, North followed by West and South have recorded the highest representation followed by East and North East, with Central showing the lowest representation.

### 2.1.5.2. Manpower Deployed – On the roll vs. Contractual/Third party

The manpower deployed in the segment as found in the sample survey has been depicted in the figure below. Like all other segments, On the roll employees still rule the roost with 59% belonging to the same category.



**Figure 2. 27** Manpower deployment trends of sampled SPA's



All figures in absolute nos

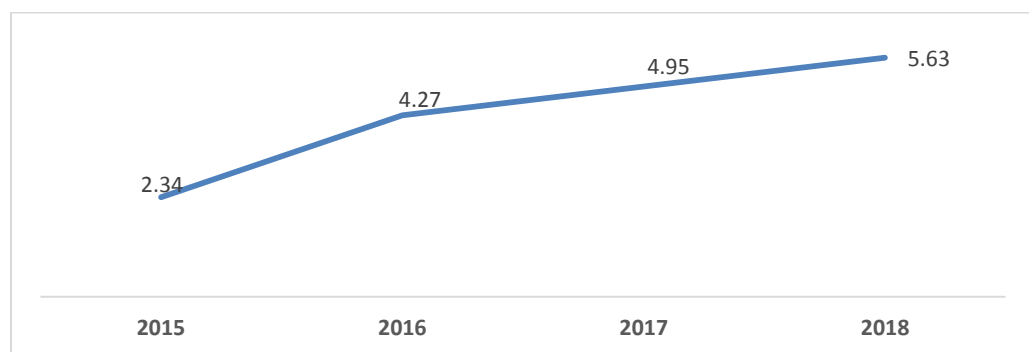
Source: Primary Survey

As discernible from the figure above, South Zone has the highest representation followed by North West, East, North East and Central Zones. In south more Contractual/Third party employees are deployed, While North and West follow the similar pattern of deployment.

### 2.1.6. Medical Units catering to foreign tourists

India is fast emerging as a hub for **medical tourism**. The inflow of foreign tourists from nearby of far flung countries ratifies the fact that there has been an increasing need of trained manpower to cater to the medical tourists. The following figure illustrates the steadily rising inflow of medical tourists in India.

**Figure 2. 28** Medical Tourism growth trends



All figures in absolute nos.

Source: Secondary Research

Indian medical tourism industry is growing at 18% CAGR year on year and is expected to be worth 9 billion by 2020. Currently, it has nearly 18% of the global medical tourism market share and is expected to be 20% by 2020. Few factors contributing to the rapid growth comprises of Highly skilled doctors and medical professionals, world class hospital infrastructure, cost-effective treatment and personalized care are some of the reasons for the fast growth of medical tourism industry in India. Additionally, India has over 500+ accredited healthcare providers (JCI and NABH) and uses world class technologies on a par with the western world. Medical travelers visiting India for healthcare can save up to 50% of the cost that they might spend if they travelled to a developed western country to avail the same treatment. Cost of treatment in India is approximately 40% less than that in any other premier European nation.

### **2.1.7. E Portals**

The world is slowly but surely moving towards a digital age. Few years back which was incomprehensible has become the order of the day. India is not insulated from this global wave and is in fact one of the fastest growing and sustainable market of the world. In India there are at least 30+ websites catering to the different need of the tourists.

**Table 2. 21** E Websites and their functionality

Address	Type	Flight	Hotels	Restaurants	Package	Bus	Trains	Cruise	Car Rentals	Entertainment Parks	Homestay	Deals/Reward	Last Minute Deals	Stories/ Blogs	Travel Guides	Mobile App	Differentiator
<a href="http://www.makemytrip.com">www.makemytrip.com</a>	Travel Aggregator	Y	Y		Y	Y	Y					Y		Y			
<a href="http://www.yatra.com">www.yatra.com</a>	Travel Aggregator	Y	Y		Y	Y	Y	Y									
<a href="http://www.expedia.com">www.expedia.com</a>	Travel Aggregator	Y	Y		Y	Y			Y			Y		Y			
<a href="http://www.travelguru.com">www.travelguru.com</a>	Travel Aggregator	Y	Y		Y							Y	Y			Y	Last Minute deals
<a href="http://www.wego.co.in">www.wego.co.in</a>	Travel Aggregator	Y	Y													Y	
<a href="http://www.cleartrip.com">www.cleartrip.com</a>	Travel Aggregator	Y	Y				Y									Y	
<a href="http://www.kayak.co.in">www.kayak.co.in</a>	Travel Aggregator	Y	Y		Y				Y								
<a href="http://www.tripadvisor.in">www.tripadvisor.in</a>	Travel review	Y	Y	Y										Y	Y		Restaurants
<a href="http://www.holidayiq.com">www.holidayiq.com</a>	Travel review		Y		Y									Y	Y		
<a href="http://www.arzoo.com">www.arzoo.com</a>	Travel Aggregator	Y	Y		Y				Y	Y							Entertainment parks
<a href="http://www.indiatoursonline.com">www.indiatoursonline.com</a>	Travel Aggregator				Y										Y		
<a href="http://www.lonelyplanet.com/in">www.lonelyplanet.com/in</a>	Travel Guide													Y	Y		
<a href="http://www.tcindia.com">www.tcindia.com</a>	Travel Aggregator				Y												
<a href="http://www.goibibo.com">www.goibibo.com</a>	Travel Aggregator	Y	Y		Y	Y	Y										Budget Hotels
<a href="http://www.travelchacha.com">www.travelchacha.com</a>	Travel Aggregator	Y	Y		Y			Y	Y								
<a href="http://www.tui.in">www.tui.in</a>	Travel Aggregator				Y			Y				Y					Weekend Getaways
<a href="http://www.cntraveller.in">www.cntraveller.in</a>	Travel Publication													Y	Y		One of it's kind travel publication
<a href="http://www.lepassagetoindia.com">www.lepassagetoindia.com</a>	Travel Agency				Y												End to end co-ordination, banks on heritage
<a href="http://www.travelopod.com">www.travelopod.com</a>	Travel Aggregator	Y	Y		Y				Y								Insurance and Corporate Trips

Address	Type	Flight	Hotels	Restaurants	Holiday Packages	Bus	Trains	Cruise	Car Rentals	Entertainment Parks	Homestay	Deals/Reward	Last Minute Deals	Stories/Blogs	Travel Guides	Mobile App	Differentiator
<a href="http://www.blablacar.in">www.blablacar.in</a>	Car Aggregator								Y								
<a href="http://www.airbnb.com">www.airbnb.com</a>	Travel Aggregator	Y									Y						Integrates homestay with Air Travel
<a href="http://www.irctc.co.in">www.irctc.co.in</a>	Travel Aggregator	Y	Y		Y	Y	Y										Most popular in terms of train
<a href="http://www.triphobocom">www.triphobocom</a>	Travel Aggregator		Y	Y	Y												Customization / Planning your own tour across the world
<a href="http://www.tripoto.com">www.tripoto.com</a>	Travel Aggregator & Review		Y		Y									Y			Start with reviews, book holidays with this site/app
<a href="http://www.traveltriangle.com">www.traveltriangle.com</a>	Travel Aggregator				Y												Pick destination, get quotes, Pick the best suited one
<a href="http://www.oyorooms.com">www.oyorooms.com</a>	Travel Aggregator (Rooms)		Y														Branded network of hotels
<a href="http://www.stayzilla.com">www.stayzilla.com</a>	Travel Aggregator (Rooms)		Y														Room aggregator - specialization on Homestay
<a href="http://www.weareholidays.com">www.weareholidays.com</a>	Travel review																Start with reviews, book holidays with this site/app

www.itraveller.com	Travel Aggregator	Y	Y	Y																	Start with destination mining, book entire holidays with this site/app
www.seeksherpa.com	Scheduler																				Tourism with a hint of history, culture and events
www.gofro.com		Travel Aggregator			Y																Customized packages to suit budget, trusted suppliers

All figures in absolute nos.

Source:

Secondary

Research

## 2.1.8. Mobile Catering Units

### 2.1.8.1. Overall Market Size of Contract Catering Business in India

The current total market size for contract catering services in India is estimated to be INR 40,000 Crores and growing at a CAGR of 14 percent annually. Around 70 percent of the contract catering business is controlled by the unorganized local catering operators. The top global players for catering services, Sodexo, Compass Group, and Elixor, control almost 65 percent of the total organized contract catering services for the B&I segment. The market is witnessing a surge in mergers and acquisitions, as the large organized players look to improve their supply capabilities and service offerings.

Figure 2. 29 Medical Tourism growth trends



All figures in absolute nos.

Source: Secondary Research

At present, 378 mobile and 9208 static catering units are operational in Indian Railways. As per Catering Policy 2017, Indian Railway Catering and Tourism Corporation Limited (IRCTC) has been mandated to carry out the unbundling by creating a distinction primarily between food preparation and food distribution on trains. At present, IRCTC has taken over almost all mobile units in phased manner from Zonal Railways and they are contracting out mobile units centrally. A synopsis of the employment trends in Mobile catering units has been depicted in the Table below.

**Table 2. 22** Employment trends amongst leading mobile caterers

Brand name	Type of Business	No. of Persons employed
Taj SATS	Air Catering	984
Rozzana	Outdoor Catering	1200
FNB India Catering	Outdoor Catering	355
Satyam Caterers Pvt. Ltd.	Outdoor Catering	5000
J.Oberoi Caterers	Outdoor Catering	830
Ambassador's Sky Chef (SKY Gourmet)	Air Catering	745
Oberoi Flight Catering Services	Air Catering	840
Four Seasons Hospitality Pvt. Ltd.	Outdoor Catering	372
Casino Air Caterers and Flight Services (CAFS)	Air Catering	630
Saj Flight Services Pvt Ltd	Outdoor Catering	456

*All figures in absolute nos.*

*Source: Primary Survey*

## 2.2. Supply Side - Hospitality Training Institutes

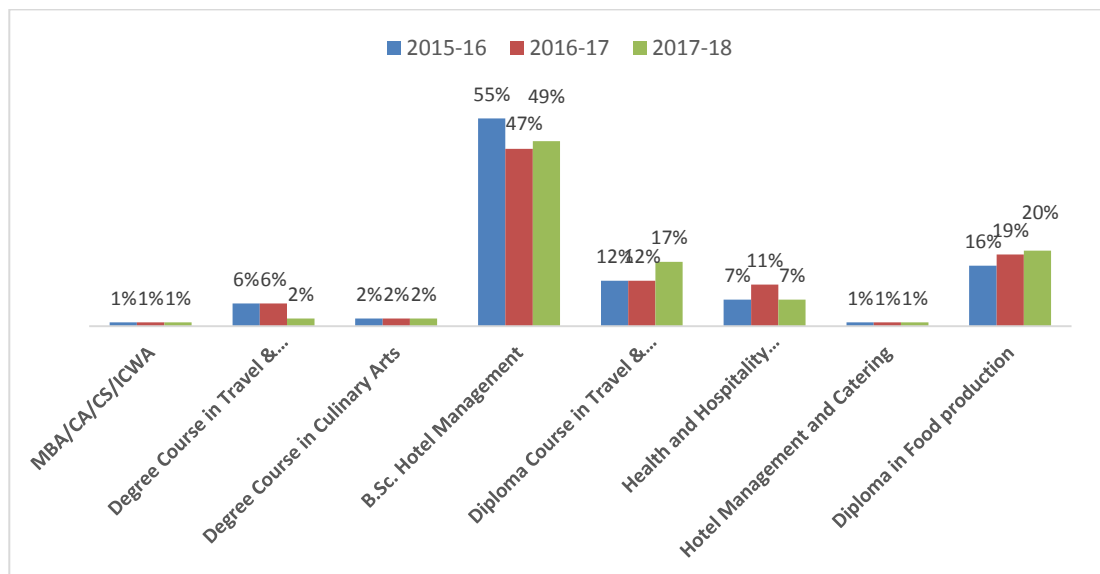
Nielsen reached out to 100 institutes across the country and found the following aspects with regard to the training provided by them.

### 2.2.1. Top Disciplines

#### 2.2.1.1. Enrolment Trends

The enrolment trends in IHM's have been elucidated in the figure below.

Figure 2. 30 Enrolment Trends in IHM's



All figures in percentages

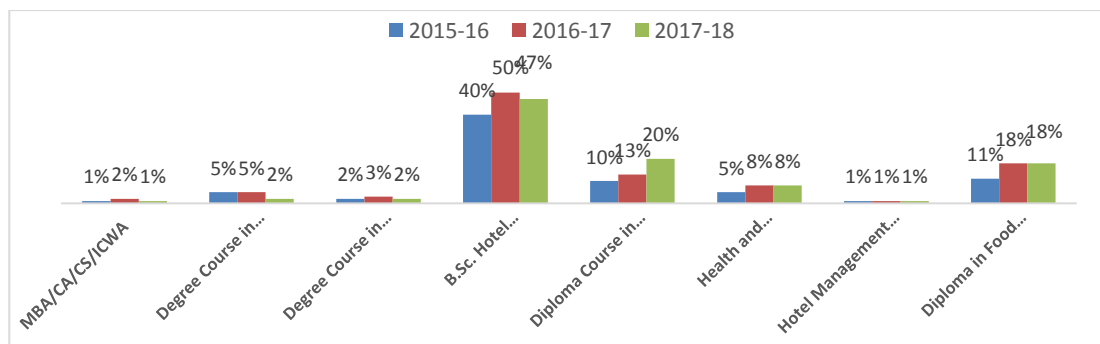
Source: Primary Survey

The figure above depicts the fact that B.Sc in Hotel management is the most sought after course. Other courses picking up slowly are Diploma Course in Travel and Tourism Management and Diploma in Food Production.

#### 2.2.1.2. Pass out Trends

The pass out trends in IHM's have been elucidated in the figure below.

Figure 2. 31 Pass out Trends in IHM's



All figures in percentages.

Source: Primary Survey



In line with the enrolment trends, the figure above (indicating passout trend) depicts the fact that B.Sc in Hotel management is the most sought after course with demand for Diploma Course in Travel and Tourism Management and Diploma in Food Production picking up.

## 2.2.2. Manpower and Salary Trends

The manpower and Salary Trends in the surveyed IHM's indicate the following trends.

**Figure 2. 32** Manpower and Salary trends in IHM's

Designations	On the roll (%)	Contractual/Third party (%)	On the roll Salary (Average in Rs./ Annum)	Contractual/Third party Salary (Average in Rs./ Annum)
Principal / Dean	3%	2%	13,98,789	18,00,000
Head of the Departments	6%		12,49,995	14,40,000
Professors/Senior Lecturer	11%	2%	22,87,808	11,40,000
Associate Professors	15%	3%	20,07,698	9,56,000
Assistant Professors/Associate Lecturer	16%	29%	20,89,869	10,42,500
Non-teaching Staff	48%	64%	18,33,640	16,17,233

*All figures in percentages and absolute nos*

*Source: Primary Survey*

It is discernible from the Table above that Non-Teaching staff form the bulk of the manpower. Contractual/Third party recruitment takes place predominantly role of assistant professors.

### 2.2.3. Soft Skill trainings imparted

The soft skill trainings imparted include the following as depicted in the Table below.

**Table 2. 23** Soft skill trainings in IHM's

Soft Skills	Professional Courses							
	MBA/CA/CS/IC WA	in Travel & Tourism/ Hospitality Management	Degree Course in Culinary Arts	B.Sc. Hotel Management	Diploma Course in Travel & Tourism/Hospita lity	Health and Hospitality management	Management and Catering	Diploma in Food production
Leadership			11%	7%	5%		5%	17%
Problem solving		11%	22%	6%	5%	8%	8%	6%
Communication		33%	11%	8%	25%	15%	5%	6%
Customer Service		11%	11%	7%			8%	11%
Flexibility				4%			5%	6%
Behavioural Skill		11%	11%	8%		4%	5%	6%
Coherency				3%			5%	
Conviction				3%			5%	
Appropriateness				3%		4%	5%	
Grooming				4%	5%	12%	5%	6%
Foreign Language				4%	5%	12%	5%	
Proficiency				4%			5%	
Stress Management				3%	10%	8%	5%	
Time Management			11%	3%			5%	6%
Emotional Intelligence				3%	5%	4%	3%	
Team Work		11%	11%	6%	10%	8%	3%	17%
Interpersonal Relationship				4%	10%	4%	3%	6%
Innovation		11%		6%	5%	4%	3%	
Planning				4%	5%	8%	3%	6%
Cultural Awareness				4%	5%	8%	5%	6%
Multi Tasking		11%	11%	6%	5%	4%	8%	6%

*All figures in percentages*

*Source: Primary Survey*

The table illustrates the fact that soft skill trainings are now being inducted in the majority of course curriculums of IHM's.

## 2.2.4. Major Barriers for Hospitality Institutes

Table 2. 24 Major Barriers in different fields in Hospitality Institutes

Fields	Budget	Lack of Awareness	Difficult to reach out	Difficult to convince parents	Difficult to get affiliation from government	Outdated syllabus	Inadequate teaching staff
Marketing Related	10%	19%	10%		10%		
Admission Related		5%		19%	14%		
Affiliation Related					33%		
Administration Related							
Curriculum Related						33%	
Faculty Related							52%

Table 2. 25 Means to address major barriers in different fields in Hospitality Institutes

Field	Contact with government schools and colleges	Advertisement on paper	Social media presence	Organize events for promotion	Good placement opportunities	Seminars and counselling	Flexible Norms and regulations	Introduction of management subjects	Hire only experienced teachers	Provide training to teachers
Marketing Related	10%	10%	19%	14%						
Admission Related		5%		5%	19%	10%				
Affiliation Related							33%			

Field	Contact with government schools and colleges	Advertisement on paper	Social media presence	Organize events for promotion	Good placement opportunities	Seminars and counselling	Flexible Norms and regulations	Introduction of management subjects	Hire only experienced teachers	Provide training to teachers
Administration Related		5%					10%			
Curriculum Related								33%		
Faculty Related									29%	14%

## 2.2.5. Perceived Skill Gap and means to address them in different disciplines

Table 2. 26 Perceived skill gap in different disciplines in Hospitality Institutes

Discipline	Lack of practical applications	Outdated Course	Lack of communication
Communication in English			19%
Food Production	33%	24%	
Hotel Management	43%	29%	10%
Foreign Language			14%

Table 2. 27 Means to address skill gap in different disciplines in Hospitality Institutes

Discipline	Revision of curriculum	More training and practical exposure
Hospitality	5%	10%
Food Production	14%	33%
Hotel Management	24%	43%

## 2.2.6. Investment Required in Hospitality Institutes

The investment required to increase hospitality courses in the near future and to increase number of students in the courses at present has been provided in the table below:

**Table 2. 28** Investment Required to Increase hospitality Courses and student in present courses

Category of expansion	Reasons for expansion	App. Cost in Rs. Crs.	Total Cost By Category of Expansion (in Rs. Crs.)
New Courses in hospitality	For The Lack Of Youth Unemployment In The Country	5	17
	There Are Enough, Need To Strengthen Them	2	
	Specific Courses Like Entrepreneurship, Crisis Management	5	
	One Year Diploma In Hotel Management F.P / F & B.S / H.K Taken Together.	5	
Increasing student strength in present courses	For The Most Growing Industry Of Employment	5	10
	Providing Additional Manpower To The Hospitality Sectors. Demand Is More And Supply Is Less	5	
Introducing courses on soft skills	Development Of Over All Personality For Hospitality Sector	3.5	9.71
	Foreign Language, Verbal Communication, Swiss Management & Empathy Management	1	
	English Speaking Courses	0.21	
	Cater To The Hospitality Sectors As Demanded From Time To Time	5	
Any Other	Focus Should Be In Personality Development, Soft Skill And Finishing School	0.5	25.5
	Accommodating More Students.	25	
<b>Total Cost (in Rs. Crs.)</b>		<b>62.21</b>	<b>62.21</b>

**Thus, total investment required in the near future introducing new courses and increase number of students in the present courses is INR 62.21 Crores.**

The fund and other infrastructural amenities that are required to introduce the conceived course as planned are provided in the following table:

**Table 2. 29** Fund Requirement to introduce the conceived hospitality courses

New Conceived	Disciplines	Infrastructure Support	Fund Requirement	Other support
Land		Equipment	7-8 crores	Government Support
3 Year Degree In Hotel Management		Land + Construction Of Building	5-7 Crores	Affiliation
M.Sc. In Hospitality Administration		Class Rooms And Modern Equipment Modern Class Room	2 Crs.	Industrial Exposure And Soft Skill Development Through Seminar, Workshop Etc.
Diploma In Bakery		Laboratory	0.2 Crores	MTS - 1
Building		Repairs And Maintenance Funds	7-8 crores	Social / Local Support
Diploma In front Office		Laboratory	0.2 Crores	MTS - 1
Electricity, Transformer		Resources	7-8 crores	Technological Support
Diploma In House Keeping		Laboratory	0.2 Crores	MTS - 1
Man Power		Purchasing Formalities	7-8 crores	Local Supplier Supports
Diploma In f & B Service		Laboratory	0.2 Crores	MTS - 1

**Thus, the total fund required in the very near future is in between INR 35.8 crores to INR 41.8 crores.**

**Therefore, the total investment required in hospitality institutes in the near future to introduce new courses and to increase the number of students for present courses and to introduce and maintain other additional amenities is INR 98 crores to INR 104 crores.**

## 2.3 Skill Assessment & Gap in Hospitality Establishments

### 2.3.1 Accommodation:

In the accommodation establishments, all 8016 establishments covered in the study in 66 locations, were asked about the professional skill requirement (desired) by them from the manpower employed currently, in terms of educational degree and the professional skill present (actual) in the employed manpower at present in their establishment.

The professional skills list presented to the establishments is elucidated in the table below.

**Table 2. 30 Professional Skills presented to Hospitality Establishments**

Educational Qualification	MBA/CA/CS/ICWA	Hotel Management & Catering Technology
	Degree Course in Travel & Tourism/ Hospitality Management	Graduate
	Degree Course in Culinary Arts	Post Graduate
	B.Sc. Hotel Management	Class 10 pass out
	Diploma Course in Travel & Tourism/Hospitality	Class 12 pass out
	Health & Hospitality Management	Any Other

By functional domain, the professional skill is then mapped for desired versus actual and the gap is calculated for each functional domain (designation). The table mapping the desired professional skills versus the actual professional skills present in current manpower employed and the gap is tabulated below.

**Table 2. 31 Desired professional skills versus the actual professional skills present in current manpower employed in Accommodations**

Functional Domain	Education	Desired Qualification %	Actual Qualification %	Professional Skill Gap
General Manager / Manager	MBA/CA/CS/ICWA	21%	16%	5%
	Degree Course in Travel & Tourism/ Hospitality Management	7%	0%	7%
	Degree Course in Culinary Arts		7%	-7%
	B.Sc Hotel Management	2%	3%	-1%
	Diploma Course in Travel & Tourism/Hospitality		0%	0%
	Health & Hospitality Management		0%	0%

Functional Domain	Education	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	Hotel Management & Catering Technology	33%	28%	5%
	Graduate	19%	21%	-2%
	Post Graduate	15%	0%	15%
	Class 10 pass out		0%	0%
	Class 12 pass out		0%	0%
	Any Other ( Pls specify)	4%	26%	-22%
	<b>Total</b>		<b>100%</b>	<b>100%</b>
<b>Executive Chef</b>	MBA/CA/CS/ICWA	1%	9%	-8%
	Degree Course in Travel & Tourism/ Hospitality Management	6%	6%	-1%
	Degree Course in Culinary Arts	2%	2%	0%
	B.Sc Hotel Management	3%	0%	3%
	Diploma Course in Travel & Tourism/Hospitality	1%	0%	1%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	50%	39%	12%
	Graduate	0%	9%	-9%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	36%	34%	2%
	<b>Total</b>		<b>100%</b>	<b>100%</b>
<b>Sous chef/chef</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course in Travel & Tourism/ Hospitality Management	2%	2%	0%
	Degree Course in Culinary Arts	8%	0%	8%
	B.Sc Hotel Management	1%	1%	0%
	Diploma Course in Travel & Tourism/Hospitality	0%	1%	-1%
	Health & Hospitality Management	0%	1%	0%
	Hotel Management & Catering Technology	43%	32%	11%
	Graduate	12%	10%	1%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	33%	53%	-19%
	<b>Total</b>		<b>100%</b>	<b>100%</b>
<b>Line cook</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course in Travel & Tourism/ Hospitality Management	2%	2%	0%
	Degree Course in Culinary Arts	2%	0%	2%
	B.Sc Hotel Management	2%	1%	1%
	Diploma Course in Travel & Tourism/Hospitality	0%	0%	0%



Functional Domain	Education	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	Health & Hospitality Management	1%	0%	1%
	Hotel Management & Catering Technology	17%	8%	9%
	Graduate	9%	6%	3%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	66%	82%	-15%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	
Assistant staff	MBA/CA/CS/ICWA	1%	1%	0%
	Degree Course in Travel & Tourism/ Hospitality Management	2%	17%	-15%
	Degree Course in Culinary Arts	0%	3%	-2%
	B.Sc Hotel Management	2%	17%	-15%
	Diploma Course in Travel & Tourism/Hospitality	0%	2%	-2%
	Health & Hospitality Management	3%	0%	3%
	Hotel Management & Catering Technology	0%	17%	-17%
	Graduate	11%	42%	-31%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	81%	0%	81%
		<b>Total</b>	<b>100%</b>	<b>100%</b>
Head / Manager	MBA/CA/CS/ICWA	8%	2%	5%
	Degree Course in Travel & Tourism/ Hospitality Management	5%	5%	0%
	Degree Course in Culinary Arts	2%	1%	1%
	B.Sc Hotel Management	23%	15%	8%
	Diploma Course in Travel & Tourism/Hospitality	0%	1%	0%
	Health & Hospitality Management	4%	3%	0%
	Hotel Management & Catering Technology	24%	19%	6%
	Graduate	28%	43%	-15%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	6%	11%	-5%
		<b>Total</b>	<b>100%</b>	<b>100%</b>
Banquet Manager	MBA/CA/CS/ICWA	2%	1%	1%
	Degree Course in Travel & Tourism/ Hospitality Management	15%	14%	1%
	Degree Course in Culinary Arts	6%	7%	-1%
	B.Sc Hotel Management	24%	22%	2%
	Diploma Course in Travel &	2%	2%	0%

Functional Domain	Education	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	Tourism/Hospitality			
	Health & Hospitality Management	5%	4%	1%
	Hotel Management & Catering Technology	9%	7%	2%
	Graduate	29%	33%	-4%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	7%	11%	-3%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	
<b>Bartender</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course in Travel & Tourism/ Hospitality Management	11%	11%	0%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	9%	8%	0%
	Diploma Course in Travel & Tourism/Hospitality	3%	2%	1%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	4%	3%	1%
	Graduate	23%	20%	3%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	50%	55%	-5%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	
<b>Waiter/Server /Room Service</b>	MBA/CA/CS/ICWA	0%	1%	0%
	Degree Course in Travel & Tourism/ Hospitality Management	2%	2%	0%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	1%	1%	0%
	Diploma Course in Travel & Tourism/Hospitality	1%	0%	0%
	Health & Hospitality Management	1%	1%	0%
	Hotel Management & Catering Technology	2%	1%	1%
	Graduate	5%	2%	3%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	88%	92%	-4%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	
<b>Manager</b>	MBA/CA/CS/ICWA	10%	3%	7%
	Degree Course in Travel & Tourism/ Hospitality Management	2%	1%	1%
	Degree Course in Culinary Arts	0%	0%	0%

Functional Domain	Education	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	B.Sc Hotel Management	10%	3%	7%
	Diploma Course in Travel & Tourism/Hospitality	2%	1%	2%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	28%	4%	24%
	Graduate	32%	26%	6%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	14%	62%	-48%
	<b>Total</b>		<b>100%</b>	<b>100%</b>
<b>Executive/Supervisor/Attendants</b>	MBA/CA/CS/ICWA	1%	0%	1%
	Degree Course in Travel & Tourism/Hospitality Management	1%	1%	0%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	1%	1%	1%
	Diploma Course in Travel & Tourism/Hospitality	2%	0%	2%
	Health & Hospitality Management	1%	0%	0%
	Hotel Management & Catering Technology	5%	2%	4%
	Graduate	23%	14%	9%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	65%	82%	-16%
	<b>Total</b>		<b>100%</b>	<b>100%</b>
<b>Receptionists</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course in Travel & Tourism/Hospitality Management	1%	1%	0%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	8%	5%	2%
	Diploma Course in Travel & Tourism/Hospitality	5%	1%	4%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	10%	2%	8%
	Graduate	51%	55%	-4%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	24%	35%	-10%
	<b>Total</b>		<b>100%</b>	<b>100%</b>
<b>Sales</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course in Travel & Tourism/	3%	2%	1%

Functional Domain	Education	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	Hospitality Management			
	Degree Course in Culinary Arts	6%	0%	6%
	B.Sc Hotel Management	2%	1%	0%
	Diploma Course in Travel & Tourism/Hospitality	0%	1%	-1%
	Health & Hospitality Management	1%	1%	0%
	Hotel Management & Catering Technology	44%	32%	12%
	Graduate	12%	11%	2%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	33%	53%	-20%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	
<b>Customer Service</b>	MBA/CA/CS/ICWA	2%	1%	2%
	Degree Course in Travel & Tourism/ Hospitality Management	15%	16%	-1%
	Degree Course in Culinary Arts	3%	7%	-4%
	B.Sc Hotel Management	26%	22%	4%
	Diploma Course in Travel & Tourism/Hospitality	3%	3%	0%
	Health & Hospitality Management	5%	4%	1%
	Hotel Management & Catering Technology	11%	8%	3%
	Graduate	27%	27%	0%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	8%	13%	-5%
<b>Total</b>	<b>100%</b>	<b>100%</b>		
<b>Bell Boys</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course in Travel & Tourism/ Hospitality Management	2%	7%	-5%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	1%	3%	-2%
	Diploma Course in Travel & Tourism/Hospitality	1%	2%	-1%
	Health & Hospitality Management	2%	4%	-2%
	Hotel Management & Catering Technology	3%	7%	-4%
	Graduate	7%	12%	-4%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	84%	65%	19%
<b>Total</b>	<b>100%</b>	<b>100%</b>		
<b>Security Mgr</b>	MBA/CA/CS/ICWA	0%	0%	0%

Functional Domain	Education	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	Degree Course in Travel & Tourism/ Hospitality Management	9%	16%	-7%
	Degree Course in Culinary Arts	4%	5%	-1%
	B.Sc Hotel Management	22%	19%	3%
	Diploma Course in Travel & Tourism/Hospitality	4%	3%	0%
	Health & Hospitality Management	7%	4%	2%
	Hotel Management & Catering Technology	14%	9%	5%
	Graduate	32%	29%	3%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	10%	14%	-4%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	
Transport Mgr	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course in Travel & Tourism/ Hospitality Management	2%	16%	-14%
	Degree Course in Culinary Arts	0%	7%	-7%
	B.Sc Hotel Management	2%	17%	-15%
	Diploma Course in Travel & Tourism/Hospitality	3%	3%	0%
	Health & Hospitality Management	1%	4%	-3%
	Hotel Management & Catering Technology	7%	8%	-1%
	Graduate	31%	24%	6%
	Post Graduate	2%	6%	-3%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	53%	15%	38%
<b>Total</b>	<b>100%</b>	<b>100%</b>		
Drivers	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course in Travel & Tourism/ Hospitality Management	0%	0%	0%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	0%	0%	0%
	Diploma Course in Travel & Tourism/Hospitality	1%	0%	1%
	Health & Hospitality Management	2%	3%	-1%
	Hotel Management & Catering Technology	4%	6%	-2%
	Graduate	0%	2%	-2%
	Post Graduate	0%	15%	-15%
	Class 10 pass out	54%	68%	-14%
	Class 12 pass out	39%	6%	34%
	Any Other ( Pls specify)	0%	0%	0%
<b>Total</b>	<b>100%</b>	<b>100%</b>		

Functional Domain	Education	Desired Qualification %	Actual Qualification %	Professional Skill Gap
<b>GM/Manager</b>	MBA/CA/CS/ICWA	34%	30%	5%
	Degree Course in Travel & Tourism/ Hospitality Management	10%	10%	0%
	Degree Course in Culinary Arts	1%	1%	0%
	B.Sc Hotel Management	8%	7%	1%
	Diploma Course in Travel & Tourism/Hospitality	6%	1%	5%
	Health & Hospitality Management	1%	0%	1%
	Hotel Management & Catering Technology	11%	4%	7%
	Graduate	27%	32%	-5%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	2%	15%	-13%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	
<b>Executive / Assistant</b>	MBA/CA/CS/ICWA	17%	13%	4%
	Degree Course in Travel & Tourism/ Hospitality Management	7%	7%	0%
	Degree Course in Culinary Arts	1%	1%	0%
	B.Sc Hotel Management	6%	5%	2%
	Diploma Course in Travel & Tourism/Hospitality	6%	1%	5%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	4%	1%	3%
	Graduate	50%	61%	-12%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	9%	11%	-2%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	
<b>Public Relations Executive</b>	MBA/CA/CS/ICWA	8%	8%	0%
	Degree Course in Travel & Tourism/ Hospitality Management	27%	25%	2%
	Degree Course in Culinary Arts	9%	8%	0%
	B.Sc Hotel Management	15%	14%	1%
	Diploma Course in Travel & Tourism/Hospitality	4%	4%	0%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	2%	2%	1%
	Graduate	36%	39%	-4%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%

Functional Domain	Education	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	Any Other ( Pls specify)	0%	0%	0%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	
<b>Gardening</b>	MBA/CA/CS/ICWA	4%	0%	4%
	Degree Course in Travel & Tourism/ Hospitality Management	44%	18%	26%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	0%	0%	0%
	Diploma Course in Travel & Tourism/Hospitality	0%	0%	0%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	0%	0%	0%
	Graduate	52%	18%	34%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	0%	63%	-63%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	
<b>Engineer/Stor es</b>	MBA/CA/CS/ICWA	7%	6%	1%
	Degree Course in Travel & Tourism/ Hospitality Management	13%	13%	0%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	1%	1%	0%
	Diploma Course in Travel & Tourism/Hospitality	3%	2%	1%
	Health & Hospitality Management	1%	0%	1%
	Hotel Management & Catering Technology	1%	2%	-1%
	Graduate	68%	71%	-3%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	6%	6%	0%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	
<b>Quality Control</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course in Travel & Tourism/ Hospitality Management	15%	0%	15%
	Degree Course in Culinary Arts	1%	2%	-1%
	B.Sc Hotel Management	12%	12%	-1%
	Diploma Course in Travel & Tourism/Hospitality	10%	3%	7%
	Health & Hospitality Management	1%	0%	1%
	Hotel Management & Catering Technology	18%	16%	2%
	Graduate	40%	44%	-4%
	Post Graduate	0%	0%	0%
	Class 10 pass out	0%	0%	0%

Functional Domain	Education	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	3%	23%	-19%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	
<b>Plumber/Waterworks</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course in Travel & Tourism/ Hospitality Management	0%	0%	0%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	0%	0%	0%
	Diploma Course in Travel & Tourism/Hospitality	0%	0%	0%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	0%	0%	0%
	Graduate	10%	0%	10%
	Post Graduate	11%	24%	-13%
	Class 10 pass out	10%	18%	-7%
	Class 12 pass out	0%	0%	0%
	Any Other ( Pls specify)	69%	58%	11%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	

In the accommodation establishments, all 8016 establishments covered in the study in 66 locations, were asked about the soft skill requirement (desired) by them from the manpower employed currently and the soft skill present (actual) in the employed manpower at present in their establishment.

The soft skills list presented to the establishments is elucidated in the table below.

**Table 2. 32 Soft skills list presented to the establishments**

Soft Skills	Leadership	Proficiency
	Problem Solving	Stress Management
	Communication	Time Management
	Customer Service	Emotional Intelligence
	Flexibility	Team work
	Behavioural Skill	Interpersonal relationship
	Coherency	Innovation
	Conviction	Planning
	Appropriateness	Cultural awareness
	Grooming	Multi-tasking
	Foreign language	Others

By functional domain, the soft skill is then mapped for desired versus actual and the gap is calculated for each functional domain (designation). The table mapping the desired soft skills versus the actual soft skills present in current manpower employed and the gap is tabulated below.



**Table 2. 33 Desired soft skills versus the actual soft skills present in current manpower employed**

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
<b>F&amp;B KITCHEN</b>	Leadership	11%	0%	11%
	Problem Solving	63%	0%	63%
	Communication	6%	7%	-1%
	Customer Service	12%	0%	12%
	Flexibility	0%	0%	0%
	Behavioural Skill	6%	24%	-18%
	Coherency	0%	0%	0%
	Conviction	0%	0%	0%
	Appropriateness	0%	0%	0%
	Grooming	0%	0%	0%
	Foreign language	0%	0%	0%
	Proficiency	0%	0%	0%
	Stress Management	3%	2%	1%
	Time Management	0%	0%	0%
	Emotional Intelligence	0%	0%	0%
	Team work	0%	0%	0%
	Interpersonal relationship	0%	0%	0%
	Innovation	0%	0%	0%
	Planning	0%	0%	0%
	Cultural awareness	0%	0%	0%
Multi tasking	0%	67%	-67%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>F &amp; B SERVICE</b>	Leadership	24%	24%	0%
	Problem Solving	4%	4%	0%
	Communication	28%	30%	-2%
	Customer Service	22%	22%	1%
	Flexibility	5%	5%	0%
	Behavioural Skill	1%	1%	0%
	Coherency	5%	5%	0%
	Conviction	0%	0%	0%
	Appropriateness	0%	0%	0%
	Grooming	0%	0%	0%
	Foreign language	1%	0%	1%
	Proficiency	0%	0%	0%
	Stress Management	0%	0%	0%
	Time Management	0%	0%	0%
	Emotional Intelligence	0%	0%	0%
	Team work	7%	7%	0%
	Interpersonal relationship	0%	0%	0%
	Innovation	0%	0%	0%
	Planning	0%	0%	0%
	Cultural awareness	0%	0%	0%

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Multi tasking	1%	1%	0%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>House Keeping /Front office</b>	Leadership	70%	62%	8%
	Problem Solving	0%	0%	0%
	Communication	9%	9%	0%
	Customer Service	6%	11%	-5%
	Flexibility	0%	0%	0%
	Behavioural Skill	4%	4%	0%
	Coherency	0%	0%	0%
	Conviction	4%	4%	0%
	Appropriateness	0%	0%	0%
	Grooming	0%	0%	0%
	Foreign language	0%	0%	0%
	Proficiency	0%	0%	0%
	Stress Management	2%	2%	0%
	Time Management	0%	0%	0%
	Emotional Intelligence	0%	0%	0%
	Team work	0%	0%	0%
	Interpersonal relationship	0%	0%	0%
	Innovation	0%	0%	0%
	Planning	0%	7%	-7%
	Cultural awareness	0%	0%	0%
Multi tasking	4%	0%	4%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>HR/Administration /Account/Purchase</b>	Leadership	0%	20%	-20%
	Problem Solving	0%	0%	0%
	Communication	1%	1%	0%
	Customer Service	6%	7%	-1%
	Flexibility	9%	6%	3%
	Behavioural Skill	7%	2%	5%
	Coherency	1%	2%	-1%
	Conviction	7%	6%	1%
	Appropriateness	2%	2%	0%
	Grooming	2%	4%	-2%
	Foreign language	5%	7%	-2%
	Proficiency	1%	0%	1%
	Stress Management	3%	2%	0%
	Time Management	0%	0%	0%
	Emotional Intelligence	6%	5%	1%
	Team work	17%	11%	6%
	Interpersonal relationship	7%	3%	4%
	Innovation	0%	0%	0%
Planning	0%	0%	0%	

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Cultural awareness	1%	1%	0%
	Multi tasking	24%	23%	2%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Other Ancillary</b>	Leadership	62%	60%	2%
	Problem Solving	8%	13%	-6%
	Communication	9%	9%	0%
	Customer Service	8%	8%	0%
	Flexibility	0%	0%	0%
	Behavioural Skill	4%	4%	0%
	Coherency	0%	0%	0%
	Conviction	0%	0%	0%
	Appropriateness	0%	0%	0%
	Grooming	0%	0%	0%
	Foreign language	4%	0%	4%
	Proficiency	0%	0%	0%
	Stress Management	0%	6%	-6%
	Time Management	0%	0%	0%
	Emotional Intelligence	0%	0%	0%
	Team work	0%	0%	0%
	Interpersonal relationship	0%	0%	0%
	Innovation	0%	0%	0%
	Planning	0%	0%	0%
	Cultural awareness	0%	0%	0%
Multi tasking	6%	0%	6%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>

In accommodation segment, the following are the observed skill gaps:

- For Bell Boys, there is high demand of professionals with soft skills like multitasking and proficiency, than what the training institutes are able to provide.
- For Public Relations Executive, there is a lot of manpower provided by supply side having soft skills such as being flexible, but the demand side doesn't require as much of it.
- For Receptionist, there is more demand of manpower with soft skill of conviction than what is being provided by supply side.
- For the rest of the designations, there is negligible gap in soft skills.
- ON the job training is more effective.

### 2.3.2 Restaurant

In the restaurant establishments, all establishments covered in the study in 66 locations, were asked about the professional skill requirement (desired) by them from the manpower employed currently, in terms of educational degree and the professional skill present (actual) in the employed manpower at present in their establishment. The professional skills list presented to the establishments is the same as elucidated in the table in the restaurant segment in this chapter.

By functional domain, the professional skill is then mapped for desired versus actual and the gap is calculated for each functional domain (designation). The table mapping the desired professional skills versus the actual professional skills present in current manpower employed and the gap is tabulated below.

**Table 2. 34 Desired professional skills versus the actual professional skills present in current manpower employed in Restaurants**

Functional Domain	Educational Qualification	Desired Qualification %	Actual Qualification %	Professional Skill Gap
<b>F&amp;B KITCHEN</b>	MBA/CA/CS/ICWA	3%	3%	0%
	Degree Course In Travel & Tourism Hospitality Management	4%	0%	4%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	0%	0%	0%
	Diploma Course in Travel & Tourism/Hospitality	10%	0%	10%
	Health & Hospitality Management	7%	0%	7%
	Hotel Management & Catering Technology	50%	4%	47%
	Graduate	8%	36%	-28%
	Post Graduate	5%	33%	-27%
	Class 10 pass out	0%	19%	-19%
	Class 12 pass out	13%	5%	8%
	Any Other (Pls specify)	0%	0%	0%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>General Manager / Manager</b>	MBA/CA/CS/ICWA	22%	20%	2%
	Degree Course In Travel & Tourism Hospitality Management	2%	2%	0%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	4%	3%	2%
	Diploma Course in Travel & Tourism/Hospitality	3%	0%	3%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	29%	12%	17%
	Graduate	21%	29%	-9%
	Post Graduate	10%	23%	-13%
	Class 10 pass out	2%	4%	-2%
	Class 12 pass out	5%	6%	-1%
	Any Other (Pls specify)	1%	1%	1%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Executive Chef</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course In Travel & Tourism Hospitality Management	1%	2%	-1%
	Degree Course in Culinary Arts	1%	3%	-2%
	B.Sc Hotel Management	16%	10%	6%
	Diploma Course in Travel & Tourism/Hospitality	7%	2%	5%
	Health & Hospitality Management	0%	1%	-1%
	Hotel Management & Catering Technology	41%	31%	10%

Functional Domain	Educational Qualification	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	Graduate	8%	13%	-5%
	Post Graduate	5%	5%	0%
	Class 10 pass out	13%	17%	-4%
	Class 12 pass out	8%	14%	-6%
	Any Other (Pls specify)	1%	2%	-1%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Sous Chef/Chef</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course In Travel & Tourism Hospitality Management	0%	0%	0%
	Degree Course in Culinary Arts	1%	1%	0%
	B.Sc Hotel Management	13%	13%	0%
	Diploma Course in Travel & Tourism/Hospitality	4%	3%	1%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	33%	20%	12%
	Graduate	17%	7%	10%
	Post Graduate	3%	0%	3%
	Class 10 pass out	14%	22%	-8%
	Class 12 pass out	14%	31%	-17%
Any Other (Pls specify)	1%	2%	-1%	
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Line Cook</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course In Travel & Tourism Hospitality Management	0%	0%	0%
	Degree Course in Culinary Arts	1%	1%	0%
	B.Sc Hotel Management	6%	7%	0%
	Diploma Course in Travel & Tourism/Hospitality	4%	5%	-1%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	17%	8%	8%
	Graduate	10%	3%	7%
	Post Graduate	0%	0%	0%
	Class 10 pass out	40%	43%	-3%
	Class 12 pass out	15%	21%	-6%
Any Other (Pls specify)	6%	11%	-5%	
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Assistant Staff</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course In Travel & Tourism Hospitality Management	0%	2%	-2%
	Degree Course in Culinary Arts	0%	1%	-1%
	B.Sc Hotel Management	1%	1%	0%
	Diploma Course in Travel & Tourism/Hospitality	2%	4%	-2%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	3%	5%	-1%
	Graduate	9%	7%	2%
Post Graduate	0%	0%	0%	

Functional Domain	Educational Qualification	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	Class 10 pass out	55%	48%	7%
	Class 12 pass out	18%	14%	4%
	Any Other (Pls specify)	11%	16%	-5%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Other (Dishwasher, etc.)</b>	MBA/CA/CS/ICWA	0%	1%	-1%
	Degree Course In Travel & Tourism Hospitality Management	0%	3%	-3%
	Degree Course in Culinary Arts	0%	2%	-2%
	B.Sc Hotel Management	0%	1%	-1%
	Diploma Course in Travel & Tourism/Hospitality	0%	4%	-4%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	0%	1%	-1%
	Graduate	13%	1%	12%
	Post Graduate	0%	0%	0%
	Class 10 pass out	56%	57%	-1%
	Class 12 pass out	15%	9%	6%
	Any Other (Pls specify)	15%	20%	-6%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>F&amp;B Service</b>	MBA/CA/CS/ICWA	2%	28%	-26%
	Degree Course In Travel & Tourism Hospitality Management	0%	44%	-44%
	Degree Course in Culinary Arts	0%	13%	-13%
	B.Sc Hotel Management	0%	2%	-1%
	Diploma Course in Travel & Tourism/Hospitality	4%	2%	2%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	0%	1%	-1%
	Graduate	1%	3%	-2%
	Post Graduate	0%	0%	0%
	Class 10 pass out	6%	6%	1%
	Class 12 pass out	2%	0%	2%
	Any Other (Pls specify)	85%	0%	85%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Head/Manager</b>	MBA/CA/CS/ICWA	6%	5%	1%
	Degree Course In Travel & Tourism Hospitality Management	1%	1%	-1%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	7%	6%	1%
	Diploma Course in Travel & Tourism/Hospitality	7%	1%	7%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	29%	6%	23%
	Graduate	32%	40%	-7%
	Post Graduate	4%	14%	-10%
	Class 10 pass out	5%	9%	-4%
	Class 12 pass out	7%	17%	-10%

Functional Domain	Educational Qualification	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	Any Other (Pls specify)	1%	1%	0%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Banquet Manager</b>	MBA/CA/CS/ICWA	4%	0%	4%
	Degree Course In Travel & Tourism Hospitality Management	1%	0%	1%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	18%	0%	18%
	Diploma Course in Travel & Tourism/Hospitality	3%	0%	3%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	14%	0%	14%
	Graduate	34%	14%	20%
	Post Graduate	2%	31%	-29%
	Class 10 pass out	10%	7%	4%
	Class 12 pass out	12%	39%	-27%
	Any Other (Pls specify)	0%	9%	-9%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Bartender</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course In Travel & Tourism Hospitality Management	0%	0%	0%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	11%	11%	0%
	Diploma Course in Travel & Tourism/Hospitality	2%	2%	-1%
	Health & Hospitality Management	0%	1%	-1%
	Hotel Management & Catering Technology	1%	1%	0%
	Graduate	25%	13%	12%
	Post Graduate	1%	1%	1%
	Class 10 pass out	32%	34%	-2%
	Class 12 pass out	20%	28%	-8%
	Any Other (Pls specify)	8%	9%	0%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Waiter/Server/Room Service</b>	MBA/CA/CS/ICWA	0%	1%	-1%
	Degree Course In Travel & Tourism Hospitality Management	0%	1%	-1%
	Degree Course in Culinary Arts	0%	1%	-1%
	B.Sc Hotel Management	0%	1%	0%
	Diploma Course in Travel & Tourism/Hospitality	1%	1%	0%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	1%	1%	1%
	Graduate	13%	1%	12%
	Post Graduate	1%	0%	0%
	Class 10 pass out	59%	60%	-1%
	Class 12 pass out	21%	27%	-6%
	Any Other (Pls specify)	3%	6%	-3%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	

Functional Domain	Educational Qualification	Desired Qualification %	Actual Qualification %	Professional Skill Gap
House Keeping / Front Office	MBA/CA/CS/ICWA	1%	15%	-14%
	Degree Course In Travel & Tourism Hospitality Management	0%	39%	-39%
	Degree Course in Culinary Arts	0%	3%	-3%
	B.Sc Hotel Management	0%	2%	-2%
	Diploma Course in Travel & Tourism/Hospitality	0%	14%	-14%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	1%	19%	-17%
	Graduate	1%	3%	-2%
	Post Graduate	0%	0%	0%
	Class 10 pass out	47%	6%	41%
	Class 12 pass out	24%	0%	23%
	Any Other (Pls specify)	25%	0%	25%
	<b>Grand Total</b>		<b>100%</b>	<b>100%</b>
Manager	MBA/CA/CS/ICWA	4%	4%	0%
	Degree Course In Travel & Tourism Hospitality Management	1%	1%	0%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	3%	2%	0%
	Diploma Course in Travel & Tourism/Hospitality	0%	1%	-1%
	Health & Hospitality Management	0%	1%	-1%
	Hotel Management & Catering Technology	7%	5%	2%
	Graduate	66%	68%	-2%
	Post Graduate	9%	11%	-2%
	Class 10 pass out	1%	3%	-1%
	Class 12 pass out	9%	5%	4%
	Any Other (Pls specify)	0%	0%	0%
	<b>Grand Total</b>		<b>100%</b>	<b>100%</b>
Executive/ Supervisor / Attendants	MBA/CA/CS/ICWA	1%	4%	-3%
	Degree Course In Travel & Tourism Hospitality Management	4%	7%	-3%
	Degree Course in Culinary Arts	1%	3%	-2%
	B.Sc Hotel Management	2%	2%	0%
	Diploma Course in Travel & Tourism/Hospitality	1%	3%	-2%
	Health & Hospitality Management	0%	1%	-1%
	Hotel Management & Catering Technology	5%	5%	-1%
	Graduate	37%	30%	8%
	Post Graduate	0%	0%	0%
	Class 10 pass out	21%	21%	0%
	Class 12 pass out	27%	22%	5%
	Any Other (Pls specify)	1%	2%	-1%
	<b>Grand Total</b>		<b>100%</b>	<b>100%</b>
Customer Service	MBA/CA/CS/ICWA	0%	6%	-6%
	Degree Course In Travel & Tourism Hospitality	0%	2%	-2%



Functional Domain	Educational Qualification	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	Management			
	Degree Course in Culinary Arts	0%	2%	-2%
	B.Sc Hotel Management	0%	0%	0%
	Diploma Course in Travel & Tourism/Hospitality	0%	5%	-5%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	1%	3%	-2%
	Graduate	22%	13%	9%
	Post Graduate	1%	1%	0%
	Class 10 pass out	48%	45%	2%
	Class 12 pass out	18%	15%	3%
	Any Other (Pls specify)	9%	7%	3%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Security Mgr</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course In Travel & Tourism Hospitality Management	0%	1%	-1%
	Degree Course in Culinary Arts	0%	1%	-1%
	B.Sc Hotel Management	0%	0%	0%
	Diploma Course in Travel & Tourism/Hospitality	0%	3%	-3%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	0%	0%	0%
	Graduate	19%	14%	5%
	Post Graduate	0%	0%	0%
	Class 10 pass out	66%	61%	5%
	Class 12 pass out	12%	15%	-3%
Any Other (Pls specify)	3%	4%	-2%	
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Transport Mgr</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course In Travel & Tourism Hospitality Management	0%	12%	-12%
	Degree Course in Culinary Arts	0%	2%	-2%
	B.Sc Hotel Management	0%	6%	-6%
	Diploma Course in Travel & Tourism/Hospitality	0%	11%	-11%
	Health & Hospitality Management	0%	5%	-5%
	Hotel Management & Catering Technology	0%	12%	-12%
	Graduate	11%	17%	-5%
	Post Graduate	0%	0%	0%
	Class 10 pass out	50%	24%	26%
	Class 12 pass out	26%	12%	14%
Any Other (Pls specify)	13%	0%	13%	
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Drivers</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course In Travel & Tourism Hospitality Management	0%	1%	-1%
	Degree Course in Culinary Arts	0%	2%	-2%

Functional Domain	Educational Qualification	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	B.Sc Hotel Management	0%	0%	0%
	Diploma Course in Travel & Tourism/Hospitality	0%	2%	-2%
	Health & Hospitality Management	0%	1%	-1%
	Hotel Management & Catering Technology	0%	0%	0%
	Graduate	6%	0%	6%
	Post Graduate	0%	0%	0%
	Class 10 pass out	71%	68%	3%
	Class 12 pass out	17%	21%	-4%
	Any Other (Pls specify)	6%	5%	1%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>HR/ ADMINISTRATION/ ACCOUNTS /PURCHAS E</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course In Travel & Tourism Hospitality Management	0%	0%	0%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	7%	7%	0%
	Diploma Course in Travel & Tourism/Hospitality	0%	0%	0%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	0%	0%	0%
	Graduate	33%	32%	1%
	Post Graduate	0%	0%	0%
	Class 10 pass out	17%	14%	3%
	Class 12 pass out	6%	6%	0%
Any Other (Pls specify)	38%	41%	-3%	
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>GM/Manag er</b>	MBA/CA/CS/ICWA	31%	13%	18%
	Degree Course In Travel & Tourism Hospitality Management	3%	5%	-2%
	Degree Course in Culinary Arts	0%	8%	-8%
	B.Sc Hotel Management	5%	6%	-2%
	Diploma Course in Travel & Tourism/Hospitality	1%	11%	-10%
	Health & Hospitality Management	0%	1%	-1%
	Hotel Management & Catering Technology	10%	9%	1%
	Graduate	27%	28%	-1%
	Post Graduate	19%	7%	12%
	Class 10 pass out	0%	2%	-2%
	Class 12 pass out	4%	8%	-4%
Any Other (Pls specify)	1%	2%	-1%	
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Executive /Assistant</b>	MBA/CA/CS/ICWA	16%	5%	11%
	Degree Course In Travel & Tourism Hospitality Management	5%	7%	-2%
	Degree Course in Culinary Arts	0%	6%	-6%
	B.Sc Hotel Management	6%	4%	2%
	Diploma Course in Travel & Tourism/Hospitality	0%	3%	-3%

Functional Domain	Educational Qualification	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	2%	2%	0%
	Graduate	56%	54%	2%
	Post Graduate	1%	1%	0%
	Class 10 pass out	2%	4%	-3%
	Class 12 pass out	10%	12%	-2%
	Any Other (Pls specify)	2%	2%	0%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Other Ancillary</b>	MBA/CA/CS/ICWA	3%	0%	3%
	Degree Course In Travel & Tourism Hospitality Management	0%	0%	0%
	Degree Course in Culinary Arts	0%	5%	-5%
	B.Sc Hotel Management	0%	0%	0%
	Diploma Course in Travel & Tourism/Hospitality	0%	0%	0%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	0%	0%	0%
	Graduate	84%	87%	-3%
	Post Graduate	5%	0%	5%
	Class 10 pass out	0%	0%	0%
	Class 12 pass out	8%	8%	0%
	Any Other (Pls specify)	0%	0%	0%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Public Relations Executive</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course In Travel & Tourism Hospitality Management	0%	7%	-7%
	Degree Course in Culinary Arts	0%	24%	-24%
	B.Sc Hotel Management	15%	7%	7%
	Diploma Course in Travel & Tourism/Hospitality	4%	4%	0%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	0%	0%	0%
	Graduate	49%	25%	24%
	Post Graduate	0%	0%	0%
	Class 10 pass out	4%	4%	0%
	Class 12 pass out	29%	29%	0%
	Any Other (Pls specify)	0%	0%	0%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Engineer/S tores</b>	MBA/CA/CS/ICWA	22%	0%	22%
	Degree Course In Travel & Tourism Hospitality Management	0%	8%	-8%
	Degree Course in Culinary Arts	0%	8%	-8%
	B.Sc Hotel Management	0%	0%	0%
	Diploma Course in Travel & Tourism/Hospitality	2%	9%	-8%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	2%	0%	2%

Functional Domain	Educational Qualification	Desired Qualification %	Actual Qualification %	Professional Skill Gap
	Graduate	52%	55%	-3%
	Post Graduate	3%	0%	3%
	Class 10 pass out	4%	4%	0%
	Class 12 pass out	8%	8%	0%
	Any Other (Pls specify)	7%	8%	0%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Quality Control</b>	MBA/CA/CS/ICWA	9%	0%	9%
	Degree Course In Travel & Tourism Hospitality Management	0%	0%	0%
	Degree Course in Culinary Arts	0%	0%	0%
	B.Sc Hotel Management	0%	0%	0%
	Diploma Course in Travel & Tourism/Hospitality	1%	0%	1%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	5%	0%	5%
	Graduate	46%	0%	46%
	Post Graduate	3%	2%	1%
	Class 10 pass out	17%	30%	-12%
	Class 12 pass out	13%	11%	2%
	Any Other (Pls specify)	4%	58%	-53%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	
<b>Plumber/ Waterworks</b>	MBA/CA/CS/ICWA	0%	0%	0%
	Degree Course In Travel & Tourism Hospitality Management	3%	9%	-6%
	Degree Course in Culinary Arts	0%	9%	-9%
	B.Sc Hotel Management	0%	0%	0%
	Diploma Course in Travel & Tourism/Hospitality	0%	14%	-14%
	Health & Hospitality Management	0%	0%	0%
	Hotel Management & Catering Technology	0%	0%	0%
	Graduate	2%	2%	0%
	Post Graduate	0%	0%	0%
	Class 10 pass out	78%	52%	26%
	Class 12 pass out	13%	11%	1%
	Any Other (Pls specify)	5%	3%	1%
<b>Grand Total</b>		<b>100%</b>	<b>100%</b>	

In the restaurant establishments, all establishments covered in the study in 66 locations, were asked about the soft skill requirement (desired) by them from the manpower employed currently and the soft skill present (actual) in the employed manpower at present in their establishment. The soft skills list presented to the establishments is the same as elucidated in the table in the restaurant segment in this chapter.

By functional domain, the soft skill is then mapped for desired versus actual and the gap is calculated for each functional domain (designation). The table mapping the desired soft skills versus the actual soft skills present in current manpower employed and the gap is tabulated below.

**Table 2. 35 Desired soft skills versus the actual soft skills present in current manpower employed in Restaurants**

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
<b>F&amp;B KITCHEN</b>	Leadership	56%	12%	44%
	Problem Solving	10%	0%	10%
	Communication	0%	46%	-46%
	Customer Service	7%	13%	-5%
	Flexibility	0%	0%	0%
	Behavioural Skill	1%	0%	1%
	Coherency	0%	0%	0%
	Conviction	0%	0%	0%
	Appropriateness	0%	7%	-7%
	Grooming	0%	0%	0%
	Foreign language	0%	0%	0%
	Proficiency	4%	0%	4%
	Stress Management	3%	4%	-1%
	Time Management	0%	3%	-3%
	Emotional Intelligence	0%	0%	0%
	Team work	7%	0%	7%
	Interpersonal relationship	4%	4%	0%
	Innovation	4%	4%	0%
	Planning	5%	0%	5%
	Cultural awareness	0%	0%	0%
Multi tasking	0%	10%	-10%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>General Manager/Manager</b>	Leadership	42%	34%	9%
	Problem Solving	9%	6%	3%
	Communication	7%	21%	-14%
	Customer Service	6%	7%	-1%
	Flexibility	1%	1%	0%
	Behavioural Skill	4%	4%	0%
	Coherency	0%	0%	0%
	Conviction	2%	5%	-3%
	Appropriateness	0%	0%	0%
	Grooming	0%	0%	0%
	Foreign language	0%	0%	0%
	Proficiency	2%	2%	-1%
	Stress Management	1%	1%	0%
	Time Management	4%	2%	2%
	Emotional Intelligence	0%	0%	0%
	Team work	3%	2%	1%
	Interpersonal relationship	4%	4%	0%
	Innovation	1%	1%	0%
	Planning	4%	1%	3%
	Cultural awareness	0%	0%	0%

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Multi tasking	9%	8%	0%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Executive Chef</b>	Leadership	16%	12%	4%
	Problem Solving	12%	4%	7%
	Communication	6%	9%	-3%
	Customer Service	8%	11%	-3%
	Flexibility	3%	3%	1%
	Behavioural Skill	3%	7%	-4%
	Coherency	1%	1%	0%
	Conviction	1%	4%	-4%
	Appropriateness	1%	1%	0%
	Grooming	0%	0%	0%
	Foreign language	1%	1%	-1%
	Proficiency	15%	22%	-7%
	Stress Management	2%	2%	0%
	Time Management	8%	7%	1%
	Emotional Intelligence	0%	0%	0%
	Team work	8%	6%	2%
	Interpersonal relationship	0%	0%	0%
	Innovation	7%	3%	4%
	Planning	5%	1%	5%
	Cultural awareness	0%	1%	0%
Multi tasking	2%	3%	-2%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Sous Chef/Chef</b>	Leadership	9%	4%	5%
	Problem Solving	7%	5%	1%
	Communication	4%	7%	-3%
	Customer Service	18%	20%	-2%
	Flexibility	5%	5%	0%
	Behavioural Skill	4%	9%	-5%
	Coherency	1%	1%	0%
	Conviction	2%	9%	-7%
	Appropriateness	4%	4%	0%
	Grooming	1%	3%	-1%
	Foreign language	2%	1%	1%
	Proficiency	10%	11%	-2%
	Stress Management	2%	1%	1%
	Time Management	13%	5%	8%
	Emotional Intelligence	1%	0%	1%
	Team work	5%	3%	2%
	Interpersonal relationship	1%	1%	0%
	Innovation	4%	1%	3%
Planning	2%	1%	1%	

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Cultural awareness	1%	1%	0%
	Multi tasking	5%	8%	-2%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Line Cook</b>	Leadership	1%	1%	0%
	Problem Solving	5%	11%	-7%
	Communication	3%	6%	-2%
	Customer Service	22%	23%	-1%
	Flexibility	2%	4%	-2%
	Behavioural Skill	4%	7%	-4%
	Coherency	1%	1%	0%
	Conviction	2%	4%	-3%
	Appropriateness	8%	6%	2%
	Grooming	1%	1%	-1%
	Foreign language	1%	0%	1%
	Proficiency	11%	10%	0%
	Stress Management	1%	1%	0%
	Time Management	8%	3%	5%
	Emotional Intelligence	0%	0%	0%
	Team work	10%	5%	5%
	Interpersonal relationship	1%	1%	0%
	Innovation	1%	1%	0%
	Planning	4%	0%	3%
	Cultural awareness	0%	0%	0%
Multi tasking	14%	13%	1%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Assistant Staff</b>	Leadership	0%	0%	0%
	Problem Solving	9%	18%	-8%
	Communication	4%	5%	-2%
	Customer Service	13%	12%	0%
	Flexibility	6%	7%	-1%
	Behavioural Skill	3%	3%	0%
	Coherency	1%	1%	0%
	Conviction	2%	1%	1%
	Appropriateness	12%	9%	3%
	Grooming	1%	1%	0%
	Foreign language	2%	2%	0%
	Proficiency	5%	5%	0%
	Stress Management	1%	0%	0%
	Time Management	5%	4%	0%
	Emotional Intelligence	1%	1%	0%
	Team work	14%	14%	0%
	Interpersonal relationship	0%	0%	0%
Innovation	1%	1%	0%	

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Planning	1%	1%	0%
	Cultural awareness	0%	0%	0%
	Multi tasking	20%	14%	6%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Other (dishwasher etc.)</b>	Leadership	0%	1%	0%
	Problem Solving	13%	13%	-1%
	Communication	3%	4%	-2%
	Customer Service	7%	11%	-4%
	Flexibility	4%	11%	-7%
	Behavioural Skill	5%	8%	-3%
	Coherency	1%	3%	-2%
	Conviction	11%	1%	10%
	Appropriateness	12%	10%	2%
	Grooming	1%	0%	0%
	Foreign language	1%	1%	0%
	Proficiency	2%	1%	0%
	Stress Management	1%	1%	0%
	Time Management	5%	5%	0%
	Emotional Intelligence	0%	0%	0%
	Team work	19%	17%	2%
	Interpersonal relationship	0%	0%	0%
	Innovation	0%	1%	0%
	Planning	1%	1%	0%
	Cultural awareness	0%	0%	0%
Multi tasking	13%	10%	3%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>F &amp; B Service</b>	Leadership	1%	8%	-7%
	Problem Solving	2%	18%	-16%
	Communication	1%	7%	-6%
	Customer Service	1%	4%	-3%
	Flexibility	1%	1%	0%
	Behavioural Skill	13%	19%	-6%
	Coherency	0%	1%	-1%
	Conviction	1%	0%	1%
	Appropriateness	23%	0%	23%
	Grooming	1%	0%	1%
	Foreign language	0%	11%	-11%
	Proficiency	5%	4%	1%
	Stress Management	0%	0%	0%
	Time Management	5%	0%	5%
	Emotional Intelligence	0%	0%	0%
	Team work	22%	18%	4%
	Interpersonal relationship	0%	3%	-2%



Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Innovation	1%	0%	1%
	Planning	0%	0%	0%
	Cultural awareness	0%	0%	0%
	Multi tasking	24%	7%	17%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Head/Manager</b>	Leadership	17%	12%	6%
	Problem Solving	17%	5%	12%
	Communication	3%	17%	-14%
	Customer Service	8%	16%	-8%
	Flexibility	3%	3%	0%
	Behavioural Skill	1%	3%	-1%
	Coherency	0%	0%	0%
	Conviction	1%	2%	-1%
	Appropriateness	3%	3%	0%
	Grooming	1%	2%	-1%
	Foreign language	3%	2%	1%
	Proficiency	10%	9%	0%
	Stress Management	5%	4%	0%
	Time Management	3%	2%	1%
	Emotional Intelligence	0%	0%	0%
	Team work	4%	2%	1%
	Interpersonal relationship	2%	2%	0%
	Innovation	2%	2%	0%
	Planning	5%	1%	4%
	Cultural awareness	0%	0%	0%
Multi tasking	12%	11%	0%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Banquet Manager</b>	Leadership	23%	23%	0%
	Problem Solving	5%	4%	0%
	Communication	28%	26%	3%
	Customer Service	7%	11%	-5%
	Flexibility	3%	15%	-12%
	Behavioural Skill	1%	1%	-1%
	Coherency	0%	0%	0%
	Conviction	0%	6%	-6%
	Appropriateness	0%	0%	0%
	Grooming	0%	0%	0%
	Foreign language	2%	3%	-1%
	Proficiency	1%	0%	1%
	Stress Management	2%	2%	1%
	Time Management	6%	4%	1%
	Emotional Intelligence	0%	0%	0%
	Team work	5%	0%	5%

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Interpersonal relationship	0%	0%	0%
	Innovation	2%	0%	2%
	Planning	0%	0%	0%
	Cultural awareness	0%	0%	0%
	Multi tasking	16%	5%	11%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Bartender</b>	Leadership	0%	0%	0%
	Problem Solving	0%	13%	-13%
	Communication	12%	18%	-5%
	Customer Service	44%	31%	13%
	Flexibility	5%	3%	2%
	Behavioural Skill	8%	9%	-1%
	Coherency	1%	1%	0%
	Conviction	3%	3%	0%
	Appropriateness	7%	6%	1%
	Grooming	0%	0%	0%
	Foreign language	0%	0%	0%
	Proficiency	6%	5%	1%
	Stress Management	0%	0%	0%
	Time Management	5%	4%	1%
	Emotional Intelligence	0%	1%	-1%
	Team work	3%	2%	1%
	Interpersonal relationship	0%	0%	0%
	Innovation	0%	0%	0%
	Planning	2%	2%	1%
	Cultural awareness	0%	0%	0%
Multi tasking	2%	3%	-1%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Waiter/Server /Room Service</b>	Leadership	0%	0%	0%
	Problem Solving	3%	8%	-5%
	Communication	9%	13%	-4%
	Customer Service	52%	36%	16%
	Flexibility	4%	4%	0%
	Behavioural Skill	6%	8%	-2%
	Coherency	1%	1%	0%
	Conviction	4%	10%	-6%
	Appropriateness	3%	3%	0%
	Grooming	1%	1%	0%
	Foreign language	2%	1%	1%
	Proficiency	1%	1%	0%
	Stress Management	0%	0%	0%
	Time Management	3%	3%	0%
	Emotional Intelligence	1%	0%	0%

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Team work	3%	3%	0%
	Interpersonal relationship	0%	1%	0%
	Innovation	0%	0%	0%
	Planning	1%	1%	0%
	Cultural awareness	0%	0%	0%
	Multi tasking	5%	4%	0%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>House Keeping/Front Office</b>	Leadership	0%	0%	0%
	Problem Solving	1%	38%	-37%
	Communication	1%	0%	1%
	Customer Service	49%	24%	25%
	Flexibility	0%	0%	0%
	Behavioural Skill	5%	0%	5%
	Coherency	0%	0%	0%
	Conviction	3%	0%	3%
	Appropriateness	22%	0%	22%
	Grooming	0%	0%	0%
	Foreign language	1%	0%	1%
	Proficiency	1%	0%	1%
	Stress Management	0%	0%	0%
	Time Management	3%	38%	-35%
	Emotional Intelligence	0%	0%	0%
	Team work	1%	0%	1%
	Interpersonal relationship	0%	0%	0%
	Innovation	0%	0%	0%
	Planning	0%	0%	0%
	Cultural awareness	1%	0%	1%
Multi tasking	12%	0%	12%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Manager</b>	Leadership	68%	63%	5%
	Problem Solving	5%	7%	-1%
	Communication	5%	8%	-3%
	Customer Service	4%	3%	1%
	Flexibility	3%	3%	0%
	Behavioural Skill	0%	1%	0%
	Coherency	0%	0%	0%
	Conviction	0%	0%	0%
	Appropriateness	0%	0%	0%
	Grooming	0%	0%	0%
	Foreign language	0%	1%	-1%
	Proficiency	3%	4%	-1%
	Stress Management	1%	1%	0%
	Time Management	3%	4%	-1%

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Emotional Intelligence	1%	0%	0%
	Team work	1%	1%	0%
	Interpersonal relationship	0%	0%	0%
	Innovation	1%	1%	0%
	Planning	1%	1%	0%
	Cultural awareness	0%	0%	0%
	Multi tasking	1%	2%	-1%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Executive / Super Visor/ Attendants</b>	Leadership	20%	17%	2%
	Problem Solving	7%	7%	1%
	Communication	8%	14%	-6%
	Customer Service	24%	21%	3%
	Flexibility	2%	2%	0%
	Behavioural Skill	2%	4%	-2%
	Coherency	1%	0%	0%
	Conviction	0%	1%	-1%
	Appropriateness	1%	0%	1%
	Grooming	0%	1%	-1%
	Foreign language	0%	6%	-6%
	Proficiency	5%	0%	5%
	Stress Management	1%	6%	-5%
	Time Management	6%	2%	5%
	Emotional Intelligence	2%	7%	-5%
	Team work	6%	0%	6%
	Interpersonal relationship	0%	0%	0%
	Innovation	2%	3%	-1%
	Planning	3%	3%	0%
	Cultural awareness	0%	0%	0%
Multi tasking	10%	8%	3%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Customer Service</b>	Leadership	3%	0%	3%
	Problem Solving	10%	8%	2%
	Communication	55%	11%	44%
	Customer Service	3%	48%	-45%
	Flexibility	3%	3%	0%
	Behavioural Skill	3%	3%	0%
	Coherency	3%	3%	0%
	Conviction	1%	4%	-3%
	Appropriateness	0%	0%	0%
	Grooming	0%	0%	0%
	Foreign language	4%	0%	4%
	Proficiency	0%	4%	-4%
	Stress Management	2%	2%	1%

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Time Management	0%	2%	-2%
	Emotional Intelligence	3%	0%	3%
	Team work	2%	4%	-1%
	Interpersonal relationship	3%	1%	1%
	Innovation	5%	4%	1%
	Planning	0%	4%	-4%
	Cultural awareness	0%	0%	0%
	Multi tasking	1%	1%	0%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Security Mgr</b>	Leadership	3%	4%	-1%
	Problem Solving	5%	15%	-10%
	Communication	3%	5%	-2%
	Customer Service	19%	13%	6%
	Flexibility	11%	9%	1%
	Behavioural Skill	5%	5%	0%
	Coherency	1%	1%	0%
	Conviction	2%	3%	-1%
	Appropriateness	18%	16%	2%
	Grooming	0%	0%	0%
	Foreign language	1%	0%	0%
	Proficiency	11%	10%	1%
	Stress Management	0%	2%	-2%
	Time Management	2%	1%	1%
	Emotional Intelligence	0%	1%	-1%
	Team work	3%	1%	2%
	Interpersonal relationship	1%	2%	-1%
	Innovation	3%	5%	-2%
	Planning	5%	0%	5%
	Cultural awareness	0%	0%	0%
Multi tasking	8%	8%	1%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Transport Mgr</b>	Leadership	0%	0%	0%
	Problem Solving	5%	24%	-19%
	Communication	4%	6%	-2%
	Customer Service	35%	31%	4%
	Flexibility	12%	17%	-5%
	Behavioural Skill	8%	0%	8%
	Coherency	7%	0%	7%
	Conviction	7%	0%	7%
	Appropriateness	0%	0%	0%
	Grooming	0%	0%	0%
	Foreign language	0%	0%	0%
	Proficiency	0%	0%	0%

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Stress Management	0%	0%	0%
	Time Management	15%	21%	-6%
	Emotional Intelligence	4%	0%	4%
	Team work	0%	0%	0%
	Interpersonal relationship	0%	1%	-1%
	Innovation	1%	0%	1%
	Planning	0%	0%	0%
	Cultural awareness	0%	0%	0%
	Multi tasking	0%	0%	0%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Drivers</b>	Leadership	0%	0%	0%
	Problem Solving	3%	5%	-2%
	Communication	2%	2%	0%
	Customer Service	40%	38%	2%
	Flexibility	7%	8%	-1%
	Behavioural Skill	5%	4%	0%
	Coherency	1%	0%	1%
	Conviction	1%	1%	0%
	Appropriateness	2%	1%	1%
	Grooming	0%	0%	0%
	Foreign language	0%	0%	0%
	Proficiency	9%	9%	0%
	Stress Management	4%	4%	0%
	Time Management	20%	21%	-1%
	Emotional Intelligence	1%	0%	1%
	Team work	5%	0%	5%
	Interpersonal relationship	0%	6%	-5%
	Innovation	0%	1%	-1%
	Planning	0%	0%	0%
	Cultural awareness	0%	0%	0%
Multi tasking	0%	0%	0%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>HR/Administration/Accounts/Purchase</b>	Leadership	0%	15%	-15%
	Problem Solving	0%	0%	0%
	Communication	0%	0%	0%
	Customer Service	8%	7%	1%
	Flexibility	1%	1%	0%
	Behavioural Skill	18%	22%	-4%
	Coherency	0%	0%	0%
	Conviction	5%	4%	1%
	Appropriateness	9%	6%	2%
	Grooming	0%	0%	0%
	Foreign language	0%	0%	0%

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Proficiency	6%	4%	2%
	Stress Management	0%	0%	0%
	Time Management	0%	0%	0%
	Emotional Intelligence	0%	0%	0%
	Team work	6%	6%	0%
	Interpersonal relationship	2%	2%	0%
	Innovation	0%	0%	0%
	Planning	1%	1%	0%
	Cultural awareness	0%	0%	0%
	Multi tasking	45%	33%	12%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>GM/Manager</b>	Leadership	37%	37%	0%
	Problem Solving	7%	2%	5%
	Communication	4%	3%	1%
	Customer Service	3%	3%	0%
	Flexibility	4%	4%	0%
	Behavioural Skill	0%	2%	-2%
	Coherency	1%	0%	1%
	Conviction	1%	3%	-2%
	Appropriateness	4%	7%	-3%
	Grooming	0%	0%	0%
	Foreign language	0%	0%	0%
	Proficiency	0%	0%	0%
	Stress Management	4%	2%	1%
	Time Management	9%	9%	0%
	Emotional Intelligence	0%	0%	0%
	Team work	6%	7%	-1%
	Interpersonal relationship	2%	3%	-1%
	Innovation	1%	2%	0%
	Planning	2%	0%	2%
Cultural awareness	0%	0%	0%	
Multi tasking	14%	15%	-1%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Executive/Assistant</b>	Leadership	12%	11%	1%
	Problem Solving	11%	15%	-4%
	Communication	5%	5%	-1%
	Customer Service	4%	4%	0%
	Flexibility	0%	1%	-1%
	Behavioural Skill	5%	8%	-4%
	Coherency	4%	1%	3%
	Conviction	3%	2%	1%
	Appropriateness	11%	11%	0%
	Grooming	2%	4%	-2%

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Foreign language	0%	0%	0%
	Proficiency	3%	3%	0%
	Stress Management	5%	5%	0%
	Time Management	24%	18%	6%
	Emotional Intelligence	1%	0%	1%
	Team work	4%	4%	0%
	Interpersonal relationship	0%	1%	-1%
	Innovation	0%	1%	-1%
	Planning	1%	0%	1%
	Cultural awareness	0%	0%	0%
	Multi tasking	5%	5%	0%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Other Ancillary</b>	Leadership	20%	18%	2%
	Problem Solving	17%	9%	8%
	Communication	20%	0%	20%
	Customer Service	12%	0%	12%
	Flexibility	0%	0%	0%
	Behavioural Skill	0%	0%	0%
	Coherency	0%	0%	0%
	Conviction	0%	0%	0%
	Appropriateness	24%	11%	13%
	Grooming	0%	0%	0%
	Foreign language	0%	0%	0%
	Proficiency	2%	20%	-18%
	Stress Management	0%	0%	0%
	Time Management	0%	0%	0%
	Emotional Intelligence	0%	0%	0%
	Team work	5%	42%	-36%
	Interpersonal relationship	0%	0%	0%
	Innovation	0%	0%	0%
	Planning	0%	0%	0%
	Cultural awareness	0%	0%	0%
Multi tasking	0%	0%	0%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Public Relations Executive</b>	Leadership	0%	0%	0%
	Problem Solving	0%	0%	0%
	Communication	12%	11%	1%
	Customer Service	35%	32%	4%
	Flexibility	0%	0%	0%
	Behavioural Skill	0%	0%	0%
	Coherency	0%	0%	0%
	Conviction	29%	26%	3%
	Appropriateness	0%	32%	-32%



Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Grooming	12%	0%	12%
	Foreign language	0%	0%	0%
	Proficiency	0%	0%	0%
	Stress Management	0%	0%	0%
	Time Management	0%	0%	0%
	Emotional Intelligence	0%	0%	0%
	Team work	0%	0%	0%
	Interpersonal relationship	0%	0%	0%
	Innovation	0%	0%	0%
	Planning	0%	0%	0%
	Cultural awareness	0%	0%	0%
	Multi tasking	12%	0%	12%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Engineer/Stor es</b>	Leadership	0%	8%	-8%
	Problem Solving	17%	19%	-3%
	Communication	6%	15%	-9%
	Customer Service	19%	19%	-1%
	Flexibility	9%	3%	6%
	Behavioural Skill	0%	0%	0%
	Coherency	2%	2%	0%
	Conviction	0%	0%	0%
	Appropriateness	0%	0%	0%
	Grooming	0%	0%	0%
	Foreign language	4%	0%	4%
	Proficiency	0%	0%	0%
	Stress Management	7%	8%	-1%
	Time Management	34%	20%	13%
	Emotional Intelligence	1%	0%	1%
	Team work	2%	0%	2%
	Interpersonal relationship	0%	0%	0%
	Innovation	0%	0%	0%
	Planning	0%	0%	0%
	Cultural awareness	0%	1%	-1%
Multi tasking	1%	3%	-2%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Quality Control</b>	Leadership	1%	1%	0%
	Problem Solving	16%	57%	-41%
	Communication	6%	8%	-2%
	Customer Service	31%	20%	11%
	Flexibility	8%	3%	5%
	Behavioural Skill	0%	0%	0%
	Coherency	0%	0%	0%
	Conviction	0%	0%	0%

Designation	Soft Skill	Desired Soft Skill %	Actual Soft Skill %	Soft Skill Gap
	Appropriateness	3%	0%	3%
	Grooming	0%	0%	0%
	Foreign language	0%	0%	0%
	Proficiency	0%	0%	0%
	Stress Management	1%	0%	1%
	Time Management	19%	0%	19%
	Emotional Intelligence	1%	0%	1%
	Team work	5%	6%	-1%
	Interpersonal relationship	5%	4%	1%
	Innovation	3%	0%	3%
	Planning	0%	0%	0%
	Cultural awareness	0%	0%	0%
	Multi tasking	1%	2%	-1%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>
<b>Plumber Waterwork</b>	Leadership	0%	0%	0%
	Problem Solving	15%	44%	-29%
	Communication	2%	3%	-1%
	Customer Service	20%	19%	0%
	Flexibility	0%	3%	-3%
	Behavioural Skill	0%	1%	-1%
	Coherency	0%	0%	0%
	Conviction	0%	0%	0%
	Appropriateness	1%	0%	1%
	Grooming	2%	0%	2%
	Foreign language	0%	0%	0%
	Proficiency	24%	0%	24%
	Stress Management	0%	19%	-19%
	Time Management	17%	0%	17%
	Emotional Intelligence	0%	2%	-2%
	Team work	0%	0%	0%
	Interpersonal relationship	0%	0%	0%
	Innovation	0%	1%	-1%
	Planning	0%	0%	0%
	Cultural awareness	0%	0%	0%
Multi tasking	19%	10%	9%	
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>0%</b>

Following are the observed skill gaps:

- Under F&B service and House Keeping/Front Office in the East zone establishments, there is a huge gap in soft skill of manpower. Requirement of soft skills like multitasking, customer service and appropriateness are not being met.

- There is more availability of Line Cook, Assistant Staff and Waiter staff with skills like multitasking, stress management, time management, customer service, problem solving and teamwork, in the regions of North, East and West zones.
- There is requirement of manpower with skills like leadership, problem solving and multitasking in the regions of North and West.
- For receptionists and sales, there is adequate availability of manpower with required soft skills like communication and customer service, especially in the north and west zone.

### **Reasons for attractiveness among employees towards Hospitality Sector**

Among workers in Hospitality Sectors, the following were the reasons which attracted them to this industry:

1. **It's a powerful industry** - The Hospitality industry is one of the world's biggest employers and creators of economic growth. A world of opportunities is offered to those who wish to start a career in this area. Travel & Tourism accounts 1 in 11 jobs in the world (according to WTTC).
2. **Diverse and dynamic work environments** - In the Hospitality Industry there is a variety of **career paths** to pursue. A Bachelor Degree in Hospitality focused in Management, for example, will include the learning of business skills. Also, the knowledge acquired during the course can be used in different paths beyond to those related to the degree. The industry offers a wide range of opportunities and a varied career.
3. **Flexibility and Job Satisfaction** - Schedules in the hospitality industry can vary, but for some positions the employees may be expected to work in shifts. On the other hand, the Hospitality Industry is really embracing flexible working, which can have a positive impact on labour productivity and service quality.
4. **Great atmosphere** - It is a vibrant industry. Most of the people who work in the hospitality sector are really passionate about their job. They are usually people-driven and have excellent interpersonal skills.
5. **Great perks** - The Hospitality Industry is known for good compensations and tips to employees.
6. **Easy entry and advancement** - For a graduate in Hospitality & Hotel Management it is easier to get a career in a challenging position which would not be open to someone with little experience.
7. **Endless opportunities** - The Hospitality Industry is growing every year. It is one of the safest choices in terms of career growth and opportunities.
8. **Global opportunities** - With a career in the Hospitality Industry one can travel the globe. The processes of applying for work permits, internships and jobs are much easier than in other industries. Besides, employees usually work in a multicultural environment. It is lucrative for those who want to travel and have exposure all around the globe.
9. **Early Responsibility**- Fast growth and career development for people working in this industry is usually the case in Hospitality sector. On the job training is an attractive feature of the job and promotions occur on a regular basis.
10. **Salary Potential** – Even though, traditionally, salaries in hospitality, travel and tourism sector is lower than other industries at the beginning, but the chance to learn and grow early in your career is huge. Positions in prestigious Hotels and in higher designation, offer better salary compared to someone with same years of experience in any other industry.

From the primary sample survey, there are several reasons mentioned by the interviewed respondents from the hospitality establishments and the top reasons were found similar for all segments of the hospitality establishments and are listed below.

Reasons for Attractiveness to Hospitality Sector	Percentage
Entry-level Job Opportunities	21%
Many opportunity for Career Advancement	10%
Tips & bonuses	11%
Mobility & transfers	13%
Sure & quick placements after course completion	23%
Easy entry and advancement	12%
Global exposure	6%
Opportunity to switch domains	4%
<b>Total</b>	<b>100%</b>

## Section 3

# Estimations for All India Level

This section estimates the estimated total number of hospitality establishments in India, estimated current demand of professionals across hospitality segments and estimated current supply of professionals in those segments for all India level. It also attempts to estimate the future demand in the sector.



### 3. All India Estimates for Hospitality Establishments

#### 3.1. Accommodation Establishments/Hotels

##### 3.1.1. Estimation at Current level (All India) for Accommodation Units

##### 3.1.1.1. Estimated Number of Accommodation Units

In the Study for Skill Gap Assessment in Hospitality Sector, Nielsen is supposed to carry out the study in the listed (RFP) 66 locations in India. These 66 locations are from 33 states/ UTs of India. The states/ UTs not having any representative towns / cities in the 66 locations are Mizoram, Lakshadweep and Dadra and Nagar Haveli. Nielsen has till now completed the physical scanning of accommodation units at the 66 locations. Nielsen has also listed out the number of accommodation units in these 66 locations and the entire states/ UTs from the Economic Census of 2015 for estimating the total number of accommodation units in India.

**Table 3. 1 The number of accommodation units from the physical scan of ongoing study and the number of accommodation units from the Economic Census 2015 for locations and state/ UTs**

Zone	State	Locations	Physical Scanning - Accommodation Units (Study on Skill Gap Assessment 2018) - Location Wise	Physical Scanning - Accommodation Units (Study on Skill Gap Assessment 2018) - State Wise (Adding up the Locations in a State/ UT)	Economic Census 2015 - Accommodation Units in Selected Locations for Study - Location Wise	Economic Census 2015 - Accommodation Units - State Wise (Adding up the Locations in a State/ UT)
North	Delhi	Delhi	2488	2488	402	402
	Haryana	Gurgaon	490	490	59	59
	Chandigarh	Chandigarh	409	409	121	121

Zone	State	Locations	Physical Scanning - Accommodation Units (Study on Skill Gap Assessment 2018) - Location Wise	Physical Scanning - Accommodation Units (Study on Skill Gap Assessment 2018) - State Wise (Adding up the Locations in a State/ UT)	Economic Census 2015 - Accommodation Units in Selected Locations for Study - Location Wise	Economic Census 2015 - Accommodation Units - State Wise (Adding up the Locations in a State/ UT)
	Punjab	Amritsar	433	433	5	5
	Jammu & Kashmir	Srinagar	497	1064	69	141
		Jammu	200		21	
		Leh	367		51	
	Himachal Pradesh	Shimla	639	1355	97	167
		Manali	716		70	
	Uttarakhand	Dehradun & Musoorie	501	2619	189	297
		Nainital	594		35	
		Rishikesh	357		7	
		Haridwar	846		39	
		Dharamshalla	321		27	
	Uttar Pradesh	Varanasi & Sarnath	484	1798	30	155
		Agra	374		34	
		Noida	456		12	
Lucknow		484	79			
Central	Madhya Pradesh	Bhopal	379	764	32	56
		Gwalior	156		17	
		Ujjain	167		3	
		Khajuraho	62		4	
	Chhattisgarh	Raipur	182	182	53	53
East	Bihar	Patna	407	637	12	29
		Bodhgaya	230		17	

Zone	State	Locations	Physical Scanning - Accommodation Units (Study on Skill Gap Assessment 2018) - Location Wise	Physical Scanning - Accommodation Units (Study on Skill Gap Assessment 2018) - State Wise (Adding up the Locations in a State/ UT)	Economic Census 2015 - Accommodation Units in Selected Locations for Study - Location Wise	Economic Census 2015 - Accommodation Units - State Wise (Adding up the Locations in a State/ UT)
	Jharkhand	Ranchi	2684	2684	13	13
	Odisha	Bhubaneswar	404	1013	11	27
		Puri	609		16	
	West Bengal	Kolkata	1201	1771	61	79
		Darjeeling	531		5	
		Mandarmoni	39		13	
West	Rajasthan	Jaipur	816	1648	187	272
		Udaipur	351		52	
		Jaisalmer	187		13	
		Jodhpur	294		20	
	Goa	Goa	1448	1448	39	39
	Gujarat	Dwarka	92	903	13	71
		Ahmedabad	811		58	
	Maharashtra	Aurangabad	250	4338	28	516
		Mumbai	2468		219	
		Pune	897		200	
		Shirdi	455		22	
		Mahabaleshwar	268		47	
Daman & Diu	Daman and diu	238	238	40	40	
South	Telangana	Hyderabad	941	941	272	272
	Andhra Pradesh	Thirupathi	355	614	54	129
		Vishakhapatnam	259		75	



Zone	State	Locations	Physical Scanning - Accommodation Units (Study on Skill Gap Assessment 2018) - Location Wise	Physical Scanning - Accommodation Units (Study on Skill Gap Assessment 2018) - State Wise (Adding up the Locations in a State/ UT)	Economic Census 2015 - Accommodation Units in Selected Locations for Study - Location Wise	Economic Census 2015 - Accommodation Units - State Wise (Adding up the Locations in a State/ UT)
	Karnataka	Mysore	159	2068	59	457
		Bangalore	1765		345	
		Mangalore	144		53	
	Kerala	Cochin	475	946	110	265
		Alapuzha	152		60	
		Munnar	140		36	
		Thiruvananthapuram	179		59	
	Tamil Nadu	Chennai	1486	2089	134	204
		Kanyakumari	107		37	
		Ooty	496		33	
Puducherry	Puducherry	390	390	96	96	
Andaman & Nicobar	Port Blair	194	194	52	52	
North East	Assam	Guwahati	313	313	5	5
	Meghalaya	Shillong	148	148	43	43
	Sikkim	Gangtok	513	513	74	74
	Manipur	Imphal	52	52	11	11
	Tripura	Agartala	95	95	13	13
	Nagaland	Dimapur	95	95	5	5
	Arunachal Pradesh	Tawang	54	54	1	1
<b>Total</b>			<b>34794</b>	<b>34794</b>	<b>4169</b>	<b>4169</b>

Using the figures present in the above table, the all India estimated total accommodation units were obtained. The methodology used for calculation was:

Estimated total accommodation units in the state/ UT =  $\{(\sum \text{actual total accommodation units in representative locations}) / (\sum \text{Total accommodation units as per Economic Census 2015 in representative locations})\} / \text{Number of accommodation units as per Economic Census 2015 in the state/ UT}$

For example,

Total number of accommodation units in Raipur as per Economic Census 2015 = a

Actual total number of accommodation units after physical scanning & including trade directory & Economic Census 2015 = b

Total number of accommodation units in Chhattisgarh as per Economic Census 2015 = A

Then,

Estimated Total number of accommodation units in Chhattisgarh =  $(b/a) * A$

**Table 3. 2 All India Estimated Total Accommodation Units**

S. No.	State	Physical Scanning - Accommodation Units (Study on Skill Gap Assessment 2018)	Economic Census 2015 - Accommodation Units in Selected Locations for Study	Economic Census 2015 - State Total Accommodation Units	Estimated Total Accommodation Units At Present – 2018
1	Andaman and Nicobar	194	52	75	<b>280</b>
2	Andhra Pradesh	614	129	595	<b>2832</b>
3	Arunachal Pradesh	54	1	23	<b>1242</b>
4	Assam	313	18	300	<b>5217</b>
5	Bihar	637	29	73	<b>1603</b>
6	Chandigarh	409	121	60	<b>203</b>
7	Chhattisgarh	182	53	92	<b>316</b>
8	Dadra Nagar Haveli*				<b>78</b>
9	Daman and Diu	238	40	39	<b>232</b>
10	Delhi	2488	402	381	<b>2358</b>
11	Goa	1448	39	222	<b>8242</b>

S. No.	State	Physical Scanning - Accommodation Units (Study on Skill Gap Assessment 2018)	Economic Census 2015 - Accommodation Units in Selected Locations for Study	Economic Census 2015 -State Total Accommodation Units	Estimated Total Accommodation Units At Present – 2018
12	Gujarat	903	71	456	5800
13	Haryana	490	59	202	1678
14	Himachal Pradesh	1355	167	382	3099
15	Jammu and Kashmir	1064	141	250	1887
16	Jharkhand	2684	45	85	5070
17	Karnataka	2068	457	1105	5000
18	Kerala	946	265	1340	4784
19	Lakshadweep*				6
20	Madhya Pradesh	764	56	396	5403
21	Maharashtra	4338	516	1212	10189
22	Manipur	52	11	14	66
23	Meghalaya	148	43	56	193
24	Mizoram*				161
25	Nagaland	95	5	22	418
26	Odisha	1013	27	73	2739
27	Puducherry	390	96	92	374
28	Punjab	433	20	213	4611
29	Rajasthan	1648	272	567	3435
30	Sikkim	513	74	74	513
31	Tamil Nadu	2089	204	648	6636
32	Telangana	941	272	592	2048
33	Tripura	95	13	18	132
34	Uttar Pradesh	1798	155	366	4246
35	Uttarakhand	2619	297	482	4250
36	West Bengal	1771	79	338	7577

S. No.	State	Physical Scanning - Accommodation Units (Study on Skill Gap Assessment 2018)	Economic Census 2015 - Accommodation Units in Selected Locations for Study	Economic Census 2015 -State Total Accommodation Units	Estimated Total Accommodation Units At Present – 2018
<b>Total</b>		<b>34794</b>	<b>4229</b>	<b>10843</b>	<b>102917</b>

\* Data on the number of accommodation units and the number of rooms present from the State Tourism Survey of 2015 for the states of Mizoram, Dadra Nagar Haveli and Lakshadweep (by Ministry of Tourism, Government of India) has been used.

**The estimated total number of accommodation units in India is 1,02,917.**

Next, the total accommodation units obtained from the physical scanning in 66 locations (ongoing study) was distributed amongst the categories of accommodation units like 5 star deluxe, 5 star, 4 star, guest house, homestay, etc. The ratios of the different categories of accommodation units were calculated for estimating the distribution of different categories of accommodation units for India.

Using the Ratios obtained from the collected data of physical scans and secondary sources on the categories of hotels/ accommodation units in the 66 locations under study from the ongoing Nielsen Skill Study for Ministry of Tourism, Government of India, 2018 and using the data on accommodation units from the State Tourism Survey of 2015 for the states of Mizoram, Dadra Nagar Haveli and Lakshadweep (by Ministry of Tourism, Government of India), the estimated accommodation units state wise for India by categories was calculated and presented as below.

**Table 3. 3 Estimated Accommodation units state wise for India by categories**

S. No.	State	5 Star Deluxe (Est.)	5 Star (Est.)	4 Star (Est.)	Classified/ Starred (Est.)	GH/ Non Star (Est.)	BB/ Homestay/ Resort/ Timeshare/ Dharamshala/ Gurudwara/ Youth Hostel (Est.)	Heritage (Est.)	Estimated Total Accommodation Units
1	Andaman and Nicobar	0	1	1	32	213	32	0	<b>280</b>
2	Andhra Pradesh	5	28	18	1033	978	770	0	<b>2832</b>
3	Arunachal Pradesh	0	0	0	92	943	207	0	<b>1242</b>
4	Assam	0	50	33	850	2400	1883	0	<b>5217</b>

S. No.	State	5 Star Deluxe (Est.)	5 Star (Est.)	4 Star (Est.)	Classified/ Starred (Est.)	GH/ Non Star (Est.)	BB/ Homestay/ Resort/ Timeshare/ Dharamshala/ Gurudwara/ Youth Hostel (Est.)	Heritage (Est.)	Estimated Total Accommodation Units
5	Bihar	0	3	3	244	1155	199	0	1603
6	Chandigarh	2	0	0	34	127	40	0	203
7	Chhattisgarh	2	2	7	47	175	83	0	316
8	Dadra Nagar Haveli*	0	0	0	6	72	0	0	78
9	Daman and Diu	0	1	0	27	159	45	0	232
10	Delhi	21	14	17	564	1314	428	0	2358
11	Goa	97	68	46	2231	4036	1759	6	8242
12	Gujarat	26	77	32	995	3706	963	0	5800
13	Haryana	38	45	17	260	1082	236	0	1678
14	Himachal Pradesh	2	5	0	190	2189	709	5	3099
15	Jammu and Kashmir	0	12	9	525	1165	176	0	1887
16	Jharkhand	0	0	2	2015	2903	149	0	5070
17	Karnataka	27	24	10	762	3114	1061	2	5000
18	Kerala	61	167	314	1269	1684	1254	35	4784
19	Lakshadweep*	0	0	0	0	6	0	0	6
20	Madhya Pradesh	0	35	57	1315	2800	1160	35	5403
21	Maharashtra	54	82	49	2379	6534	1090	0	10189
22	Manipur	0	0	1	19	29	17	0	66
23	Meghalaya	0	0	1	13	119	60	0	193
24	Mizoram*	0	0	0	45	87	29	0	161
25	Nagaland	0	0	0	53	136	229	0	418
26	Odisha	3	5	8	243	2063	416	0	2739
27	Puducherry	0	0	0	20	308	41	4	374
28	Punjab	43	11	32	320	3046	1161	0	4611
29	Rajasthan	21	15	27	1094	1561	686	31	3435

S. No.	State	5 Star Deluxe (Est.)	5 Star (Est.)	4 Star (Est.)	Classified/ Starred (Est.)	GH/ Non Star (Est.)	BB/ Homestay/ Resort/ Timeshare/ Gurudwara/ Youth Hostel (Est.)	Dharamshala/ Heritage (Est.)	Estimated Total Accommodation Units
30	Sikkim	1	2	3	35	375	97	0	513
31	Tamil Nadu	29	38	16	1207	3742	1566	38	6636
32	Telangana	15	22	11	189	1445	363	2	2048
33	Tripura	0	0	0	11	79	42	0	132
34	Uttar Pradesh	19	5	0	994	3037	191	0	4246
35	Uttarakhand	2	2	0	1005	2653	589	0	4250
36	West Bengal	21	26	26	766	5335	1403	0	7577
<b>Total</b>		<b>486</b>	<b>739</b>	<b>740</b>	<b>20886</b>	<b>60772</b>	<b>19135</b>	<b>159</b>	<b>102917</b>

\* Data on the number of accommodation units and the number of rooms present from the State Tourism Survey of 2015 for the states of Mizoram, Dadra Nagar Haveli and Lakshadweep (by Ministry of Tourism, Government of India) has been used.

### 3.1.1.2. Estimated Number of Rooms in Accommodation Units

Table 3. 4 Rooms and number of accommodation units in 2017 for the 36 states and UTs that are being covered in the current study, as per Ministry of Tourism

S. No.	States/ UTs	Hotels - MoT (2017)								Rooms - MoT (2017)							
		5 Star Deluxe	5 Star	4 Star	3+2+1 Star	Guest House	B&B	Herit	Total	5 Star Deluxe	5 Star	4 Star	3+2+1 Star	Guest House	B&B	Herit	Total
1	ANDAMAN & NICOBAR								0								0
2	AP	1	7	5	20				33	225	744	487	1457				2913
3	ARUNACHAL				3				3				86				86
4	ASSAM			1	12				13			196	468				664

S. No.	States/ UTs	Hotels - MoT (2017)								Rooms - MoT (2017)							
		5 Star Deluxe	5 Star	4 Star	3+2+1 Star	Guest House	B&B	Herit	Total	5 Star Deluxe	5 Star	4 Star	3+2+1 Star	Guest House	B&B	Herit	Total
5	BIHAR		1	1	1		3		6		81	114	68		11		274
6	CHANDIGARH	4	1	2	2				9	688	155	132	191				1166
7	CHHATTISGARH	1		3	3				7	108		370	177				655
8	D. & N. HAVELI				1				1				60				60
9	DAMAN & DIU		1						1		176						176
10	DELHI	22	10	5	6				43	6875	1402	474	163				8914
11	GOA	17	12	8	7			2	46	2927	913	563	292		48		4743
12	GUJARAT	4	18	10	28		2	1	63	640	1981	723	1650		7	22	5023
13	HARYANA	11	4	3	13		113		144	2504	886	435	791		588		5204
14	HIMACHAL PRADESH	1	1		2		227	2	233	85	59		69		1137	107	1457
15	JAMMU & KASHMIR				3		24		27				120		103		223
16	JHARKHAND			1	2		1		4			93	93		6		192
17	KARNATAKA	11	9	5	4		7		36	2738	1357	626	305		24		5050
18	KERALA	12	34	175	296			12	529	1497	2661	4535	5306			166	14165
19	LAKSHADWEEP								0								0
20	MADHYA PRADESH		6	2	4			1	13		746	285	106			15	1152
21	MAHARASHTRA	23	19	18	30	3	12		105	8037	2727	2227	1944	39	47		15021
22	MANIPUR			1	1				2			171	28				199
23	MEGHALAYA			1	1				2			50	51				101

S. No.	States/ UTs	Hotels - MoT (2017)								Rooms - MoT (2017)							
		5 Star Deluxe	5 Star	4 Star	3+2+1 Star	Guest House	B&B	Herit	Total	5 Star Deluxe	5 Star	4 Star	3+2+1 Star	Guest House	B&B	Herit	Total
24	MIZORAM				1				1				45				45
25	NAGALAND				1				1				19				19
26	ODISHA	1		2	2		3		8	62		128	81		12		283
27	PUDUCHERRY				3				3				216				216
28	PUNJAB	4	1		3				8	627	114		84				825
29	RAJASTHAN	10	7		13		61	24	115	1108	587		1017		330	934	3976
30	SIKKIM	1	2	2	5				10	64	103	83	101				351
31	TAMIL NADU	9	10	5	35		8	3	70	2009	1563	554	2205		30	70	6431
32	TELANGANA	7	7	4	15				33	1795	1385	586	1351				5117
33	TRIPURA				1				1				36				36
34	UTTAR PRADESH	8	8	1	6		110	1	134	1293	1028	88	203		595	41	3248
35	UTTARAKHAND	1			2		50		53	135			124		250		509
36	WEST BENGAL	5	4	3	13	2			27	1027	763	304	560	49			2703
<b>Total</b>		<b>153</b>	<b>162</b>	<b>258</b>	<b>539</b>	<b>5</b>	<b>621</b>	<b>46</b>	<b>1784</b>	<b>34444</b>	<b>19431</b>	<b>13224</b>	<b>19467</b>	<b>88</b>	<b>3140</b>	<b>1403</b>	<b>91197</b>

The estimated rooms for the same categories of accommodation units as listed above (as per Ministry of Tourism Data) for 33 states and UTs under study (as per list of 66 locations in the RFP provided – they fall in the 33 states and UTs – Study on Skill Gap Assessment) is presented in the table below.

For arriving at the number of hotels and number of rooms present in Mizoram, Dadra Nagar Haveli and Lakshadweep, the data on the number of accommodation units and the number of rooms present from the State Tourism Survey of 2015 for the states of Mizoram, Dadra Nagar Haveli and Lakshadweep (by Ministry of Tourism, Government of India) has been used. In case of Andaman and Nicobar islands, the estimated total number of accommodation units are 280 (using data from 2018 Nielsen Skill Survey physical scan and Economic Census 2015 ratios), however in



the absence of data on number of rooms from Ministry of Tourism, Government of India, the All India units to room average ratio (14.81 rooms on an average per accommodation unit) has been used to arrive at the number of rooms.

**Table 3. 5 Estimated Total of Rooms and Accommodation Units for categories of Accommodation**

S. No.	States/ UTs	Estimated Hotels – Nielsen							Estimated Rooms - Nielsen								
		5 Star Deluxe	5 Star	4 Star	Classified / Starred	GH/ Non Star	BB/ Homestay/ Resort/ Dharamshala/ Youth Hostel	Heritage	Total (Provisional)	5 Star Deluxe	5 Star	4 Star	Classified/ Starred	GH/ Non Star	BB/ Homestay/ Resort/ Dharamshala/ Youth Hostel	Heritage	Total (Provisional)
1	Andaman and Nicobar**	0	1	1	32	213	32	0	280								4144
2	Andhra Pradesh	5	28	18	1033	978	770	0	2832	1038	2941	1797	75267				81043
3	Arunachal Pradesh	0	0	0	92	943	207	0	1242				2637				2637
4	Assam	0	50	33	850	2400	1883	0	5217			6533	33150				39683
5	Bihar	0	3	3	244	1155	199	0	1603		204	287	16604		729		17824
6	Chandigarh	2	0	0	34	127	40	0	203	341	0	0	3268				3609
7	Chhattisgarh	2	2	7	47	175	83	0	316	187		856	2765				3809
8	Dadra Haveli* Nagar	0	0	0	6	72	0	0	78								1749
9	Daman and Diu	0	1	0	27	159	45	0	232		172						172
10	Delhi	21	14	17	564	1314	428	0	2358	6516	1993	1617	15320				25446
11	Goa	97	68	46	2231	4036	1759	6	8242	16661	5197	3205	93081			137	118280
12	Gujarat	26	77	32	995	3706	963	0	5800	4110	8482	2322	58663		3372	0	76949
13	Haryana	38	45	17	260	1082	236	0	1678	8573	9859	2482	15832		1229		37975
14	Himachal Pradesh	2	5	0	190	2189	709	5	3099	194	270		6550		3552	245	10811
15	Jammu and Kashmir	0	12	9	525	1165	176	0	1887				20993		753		21746
16	Jharkhand	0	0	2	2015	2903	149	0	5070			176	93718		895		94789

S. No.	States/ UTs	Estimated Hotels – Nielsen								Estimated Rooms - Nielsen							
		5 Star Deluxe	5 Star	4 Star	Classified / Starred	GH/ Non Star	BB/ Homestay/ Resort/ Dharamshala/ Youth Hostel	Heritage	Total (Provisional)	5 Star Deluxe	5 Star	4 Star	Classified/ Starred	GH/ Non Star	BB/ Homestay/ Resort/ Dharamshala/ Youth Hostel	Heritage	Total (Provisional)
17	Karnataka	27	24	10	762	3114	1061	2	5000	6620	3646	1211	58076		3639		73192
18	Kerala	61	167	314	1269	1684	1254	35	4784	7570	13060	8124	22751			490	51995
19	Lakshadweep*	0	0	0	0	6	0	0	6								62
20	Madhya Pradesh	0	35	57	1315	2800	1160	35	5403		4396	8061	34855			530	47843
21	Maharashtra	54	82	49	2379	6534	1090	0	10189	18878	11799	6103	154183	84948	4269		280179
22	Manipur	0	0	1	19	29	17	0	66			218	535				752
23	Meghalaya	0	0	1	13	119	60	0	193			65	664				729
24	Mizoram*	0	0	0	45	87	29	0	161								2664
25	Nagaland	0	0	0	53	136	229	0	418				1003				1003
26	Odisha	3	5	8	243	2063	416	0	2739	168		519	9855		1665		12207
27	Puducherry	0	0	0	20	308	41	4	374				1456				1456
28	Punjab	43	11	32	320	3046	1161	0	4611	6678	1214		8946				16838
29	Rajasthan	21	15	27	1094	1561	686	31	3435	2310	1224		85615		3710	1217	94076
30	Sikkim	1	2	3	35	375	97	0	513	64	103	125	707				999
31	Tamil Nadu	29	38	16	1207	3742	1566	38	6636	6382	5958	1760	76045		5873	889	96906
32	Telangana	15	22	11	189	1445	363	2	2048	3907	4306	1594	17054				26862
33	Tripura	0	0	0	11	79	42	0	132				399				399
34	Uttar Pradesh	19	5	0	994	3037	191	0	4246	3053	607	0	33634		1035	0	38328
35	Uttarakhand	2	2	0	1005	2653	589	0	4250	219			62283		2946		65448
36	West Bengal	21	26	26	766	5335	1403	0	7577	4394	4897	2601	32990	130714			175596
<b>Total</b>		<b>486</b>	<b>739</b>	<b>740</b>	<b>20886</b>	<b>60772</b>	<b>19135</b>	<b>159</b>	<b>102917</b>	<b>97863</b>	<b>80327</b>	<b>49656</b>	<b>1038901</b>	<b>215662</b>	<b>33667</b>	<b>3508</b>	<b>1528202</b>

\* Data on the number of accommodation units and the number of rooms present from the State Tourism Survey of 2015 for the states of Mizoram, Dadra Nagar Haveli and Lakshadweep (by Ministry of Tourism, Government of India) has been used.

*\*\* In the absence of data on number of rooms from Ministry of Tourism, Government of India, the All India units to room average ratio (14.81 rooms on an average per accommodation unit) has been used to arrive at the number of rooms.*

**Hence the estimated total number of rooms in India is 15,28,202 using the ratio of rooms to number of accommodation units as per Ministry of Tourism’s published data for the year of 2017.**

Post completion of the primary sample study for the “Skill Gap Assessment” Study for Ministry of Tourism, 2018-19, the following are the statistics of rooms and number of accommodation units was obtained from the sample study for the 33 states and UTs that has been covered. Based on the obtained ratios by category of accommodation units, the estimated total number of rooms in India is arrived at and is presented in the table below.

**Table 3. 6 Estimated Rooms in accommodation units**

Categories	No. of hotels in sample	Rooms in Sample	Estimated No. of hotels in All India	Estimated Rooms in All India
Heritage	44	2960	565	38003
5 Star	125	13787	1605	177011
4 Star	222	14728	2850	189092
1/2/3 Star	2237	64815	28721	832156
Guest Houses	1063	18343	13648	235505
Bed& Breakfast	30	247	385	3171
Resorts	90	2153	1156	27642
Unclassified Hotels	3242	68530	41624	879853
Home Stays	778	9784	9989	125616
Youth Hostels	44	905	565	11619
Others	141	1758	1811	22571
<b>Total</b>	<b>8016</b>	<b>198010</b>	<b>102917</b>	<b>2542240</b>

**Hence the estimated total number of rooms in India is 25,42,240 using the ratio of rooms to number of accommodation units as obtained from this study.**

### 3.1.1.3. Estimated manpower hired in Accommodation Units

Using the ratio of total number of accommodation establishments for all India to the total number of accommodation establishment for 66 locations, the corresponding total manpower hired is arrived at. The estimated manpower hired in different categories of accommodation has been elucidated in the Table below:-

**Table 3. 7** Estimated manpower hired in different categories of Accommodation Units

Categories	No. of hotels in sample	Rooms in Sample	Total Manpower in sample	Estimated No. of hotels in All India	Estimated Rooms in All India	Estimated manpower hired (in nos.)
Heritage	44	2960	3485	565	38003	44744
5 Star	125	13787	25345	1605	177011	325403
4 Star	222	14728	24880	2850	189092	319433
1/2/3 Star	2237	64815	64189	28721	832156	824119
Guest Houses	1063	18343	15460	13648	235505	198490
Bed& Breakfast	30	247	311	385	3171	3993
Resorts	90	2153	2430	1156	27642	31199
Unclassified Hotels	3242	68530	34463	41624	879853	442469
Home Stays	778	9784	6404	9989	125616	82221
Youth Hostels	44	905	262	565	11619	3364
Others	141	1758	1246	1811	22571	9847
<b>Total</b>	<b>8016</b>	<b>198010</b>	<b>178475</b>	<b>102917</b>	<b>2542240</b>	<b>2291431</b>

Using the ratio of total number of accommodation establishments for all India to the total number of accommodation establishment for 66 locations, the corresponding total manpower hired for each designation category and the total manpower hired over all designations for all India at the present level has been achieved. The estimated manpower hired by different designations has been elucidated in the Table below:-

**Table 3. 8** Estimated manpower hired in different designations of Accommodation Units

Designation	Estimated manpower @ present – 2018
General Manager / Manager	12672
Executive Chef	17204
Sous chef	24676
Chef	55207
Line cook	68521

Designation	Estimated manpower @ present – 2018
Assistant Staff	88602
Others (dishwasher, etc.)	69677
<b>Total F&amp;B KITCHEN</b>	<b>336560</b>
Head	7665
Restaurant Manager	19888
Banquet Manager	6946
Bartender	13622
Waiter/ Server	152822
Room Service	85841
Other	9526
<b>Total F &amp; B SERVICE</b>	<b>296310</b>
Manager _On the roll	103302
Executive/Supervisor	43755
Room Attendants	261183
Bell Boys	72848
Security Mgr	30698
Transport Mgr	3043
Drivers	22096
Other (specify)	26821
<b>Total House Keeping</b>	<b>563745</b>
Receptionists	120481
Sales	17179
Customer Service	95393
<b>Total Front Office</b>	<b>233053</b>
HR Head/Manager	18295
HR Executive	8769
Admin Head/Executive	10643
Accounts/Finance Head	29684
Purchase	730908
Other (specify)	1592
<b>Total HR/ADMINISTRATION/ACCOUNTS/PURCHASE</b>	<b>799892</b>
Public Relations Executive	2825
Gardening	7845
Engineer	6817
Electrician	21030
Quality Control	3595
Plumber/Waterworks	16768
Other - 1	2991
<b>Other Ancillary</b>	<b>61871</b>
<b>Total All Designations</b>	<b>2291431</b>

The total manpower hired over all accommodation units for all India at the current level is 22,91,431.

The function wise estimated manpower employed in accommodation units is presented in the table below.

**Table 3. 9 Function Wise Estimated Manpower Employed in Accommodation Units**

Function Wise Manpower At Present	Formally Trained	On The Job Trained	Untrained	Total
F&B KIT	178282	88602	69677	336560
F&B SERVICE	48120	238663	9526	296310
HOUSE KEEPING	169153	30698	363894	563745
FRONT OFFICE	17179	215874	0	233053
ADMIN	789531	8769	1592	799892
OTHERS	9642	3595	48634	61871
<b>TOTAL</b>	<b>1211907</b>	<b>586201</b>	<b>493324</b>	<b>2291431</b>

#### 3.1.1.4. Estimated Annual Attrition in Accommodation Units

The estimated annual attrition (including retirement) in different designations have been elucidated in the Table below:-

**Table 3. 10** Estimated annual attrition in Accommodation Units

Designation	Estimated attrition @ present
General Manager / Manager	565
Executive Chef	642
Sous chef	668
Chef	1772
Line cook	5598
Assistant Staff	5970
Others (dishwasher, etc.)	5636
<b>Total F&amp;B KITCHEN</b>	<b>20850</b>
Head	347
Restaurant Manager	514
Banquet Manager	270
Bartender	1001
Waiter/ Server	15741
Room Service	6086
Other	1001

Designation	Estimated attrition @ present
<b>Total F &amp; B SERVICE</b>	<b>24959</b>
Manager _On the roll	3762
Executive/Supervisor	4442
Room Attendants	27321
Bell Boys	6856
Security Mgr	963
Transport Mgr	103
Drivers	629
Other (specify)	4776
<b>Total House Keeping</b>	<b>48852</b>
Receptionists	11183
Sales	693
Customer Service	10810
<b>Total Front Office</b>	<b>22686</b>
HR Head/Manager	398
HR Executive	77
Admin Head/Executive	0
Accounts/Finance Head	51
Purchase	0
Other (specify)	0
<b>Total HR/ADMINISTRATION/ACCOUNTS/PURCHASE</b>	<b>526</b>
Public Relations Executive	26
Gardening	90
Engineer	295
Electrician	270
Quality Control	0
Plumber/Waterworks	90
Other - 1	0
<b>Other Ancillary</b>	<b>770</b>
<b>Total All Designations</b>	<b>118645</b>

The total attrition (including retirement) over all accommodation units for all India at the current level is 1,18,645.

### 3.1.2. Estimation at Future Level (All India) in Accommodation Units

#### 3.1.2.1. Future Room Requirement in Accommodation Units

The estimated rooms in future level in accommodation segment has been arrived on the basis of the domestic and foreign tourist growth rate in India. This is done as it is assumed that the growth rate of domestic and foreign tourists in India is directly proportional to the growth in domestic and foreign occupants of rooms in accommodation units and hence growth in rooms. The estimated rooms in future at year 2022 and year 2025 in accommodation units have been depicted in the Table below.

**Table 3. 11** Estimated no. of rooms in accommodation units in future

State	Estimated No. Of Rooms in 2019	Estimated No. Of Rooms in 2020	Estimated No. Of Rooms in 2021	Estimated No. Of Rooms in 2022	Estimated No. Of Rooms in 2023	Estimated No. Of Rooms in 2024	Estimated No. Of Rooms in 2025
Andaman and Nicobar	26597	31181	36555	42856	50242	58902	69054
Andhra Pradesh	82804	100251	121374	146948	177910	215397	260782
Arunachal Pradesh	5777	7760	10423	14000	18805	25259	33927
Assam	33994	36647	39507	42591	45916	49499	53363
Bihar	39821	44895	50616	57067	64339	72538	81781
Chandigarh	29551	32559	35873	39525	43548	47981	52865
Chhattisgarh	10483	8318	6600	5237	4156	3298	2617
Daman Diu	15398	15798	16207	16628	17059	17502	17956
Delhi	198489	215342	233626	253463	274983	298331	323662
Goa	146148	181223	224716	278647	345522	428446	531271
Gujarat	86886	100908	117192	136105	158070	183579	213205
Haryana	48282	36897	28197	21548	16467	12584	9617
Himachal Pradesh	134675	143173	152207	161810	172020	182874	194413
Jammu & Kashmir	92606	106076	121505	139179	159423	182612	209173
Jharkhand	13265	13306	13347	13388	13430	13471	13513
Karnataka	193455	222362	255589	293781	337680	388138	446137
Kerala	71961	77504	83475	89905	96831	104290	112324
Madhya Pradesh	50668	54233	58049	62134	66506	71185	76194
Maharashtra	294371	318064	343664	371324	401211	433503	468395
Manipur	10285	11303	12421	13650	15000	16484	18114



State	Estimated No. Of Rooms in 2019	Estimated No. Of Rooms in 2020	Estimated No. Of Rooms in 2021	Estimated No. Of Rooms in 2022	Estimated No. Of Rooms in 2023	Estimated No. Of Rooms in 2024	Estimated No. Of Rooms in 2025
Meghalaya	16350	18217	20296	22613	25195	28071	31276
Nagaland	10127	10414	10710	11013	11326	11647	11978
Orissa	86367	94239	102829	112202	122429	133589	145765
Puducherry	24644	26954	29480	32242	35264	38569	42183
Punjab	20225	24081	28673	34140	40650	48401	57630
Rajasthan	113103	125724	139754	155349	172684	191954	213374
Sikkim	45071	59751	79212	105011	139214	184557	244668
Tamil Nadu	254770	259219	263746	268351	273037	277805	282656
Telangana	151826	161691	172196	183384	195298	207987	221500
Tripura	10935	11555	12211	12903	13635	14408	15226
Uttar Pradesh	149577	162360	176236	191297	207646	225392	244654
Uttarakhand	186776	216677	251366	291608	338293	392452	455281
West Bengal	140820	165121	193616	227028	266205	312144	366010
*Dadra Nagar Haveli	-	-	-	-	-	-	-
*Lakshadweep	-	-	-	-	-	-	-
*Mizoram	-	-	-	-	-	-	-
<b>Grand Total</b>	<b>2796106</b>	<b>3093803</b>	<b>3441467</b>	<b>3846928</b>	<b>4319993</b>	<b>4872847</b>	<b>5520563</b>

\* Please note that the states/ UTs coloured in pink were outside the coverage area of the study and hence was not estimated for rooms.

The estimated total Number of rooms at future level for all India in the year 2025 is 55,20,563.

### 3.1.2.2. Estimated Manpower in future in Accommodation Units

With the underlying assumption that the per room manpower ration obtained in the sample study of accommodation units at present (2018) will remain the same till the year 2025, the estimated manpower expected to be employed in the accommodation units in 2022 and 2025 is calculated. The trends for estimated manpower expected to be employed in accommodation units have been depicted in the Table below.

**Table 3. 12** Estimated Manpower in Accommodation Units in Future

State	Estimated No. Of rooms All India at Present - 2018	Estimated Total Manpower All India at Present - 2018	Estimated No. Of Rooms All India - 2022	Estimated Total Manpower All India - 2022	Estimated No. Of Rooms All India – 2025	Estimated Total Manpower All India - 2025
Andaman and Nicobar	22686	<b>26975</b>	42856	50956	69054	82107
Andhra Pradesh	68393	<b>69215</b>	146948	148713	260782	263915
Arunachal Pradesh	4301	<b>5084</b>	14000	16549	33927	40105
Assam	31532	<b>49404</b>	42591	66731	53363	83608
Bihar	35320	<b>27835</b>	57067	44973	81781	64450
Chandigarh	26821	<b>20440</b>	39525	30121	52865	40288
Chhattisgarh	13211	<b>10618</b>	5237	4209	2617	2103
Daman Diu	15009	<b>10785</b>	16628	11948	17956	12903
Delhi	182955	<b>270786</b>	253463	375143	323662	479042
Goa	117862	<b>86689</b>	278647	204948	531271	390756
Gujarat	74813	<b>46233</b>	136105	84111	213205	131758
Haryana	63180	<b>77560</b>	21548	26452	9617	11805
Himachal Pradesh	126682	<b>96729</b>	161810	123551	194413	148445
Jammu & Kashmir	80847	<b>45861</b>	139179	78950	209173	118654
Jharkhand	13224	<b>13250</b>	13388	13414	13513	13539
Karnataka	168306	<b>189593</b>	293781	330938	446137	502563
Kerala	66814	<b>69728</b>	89905	93827	112324	117223
Madhya Pradesh	47337	<b>58610</b>	62134	76930	76194	94338
Maharashtra	272442	<b>203510</b>	371324	277373	468395	349883
Manipur	9360	<b>6715</b>	13650	9792	18114	12995
Meghalaya	14675	<b>11863</b>	22613	18281	31276	25283
Nagaland	9847	<b>5225</b>	11013	5844	11978	6356
Orissa	79152	<b>54501</b>	112202	77258	145765	100369
PONDICHERY	22532	<b>15214</b>	32242	21770	42183	28483
Punjab	16986	<b>18424</b>	34140	37030	57630	62508
Rajasthan	101749	<b>113265</b>	155349	172932	213374	237525
Sikkim	33998	<b>27244</b>	105011	84152	244668	196067
Tamil Nadu	250398	<b>242528</b>	268351	259916	282656	273771
Telangana	142564	<b>95945</b>	183384	123417	221500	149070
Tripura	10348	<b>7973</b>	12903	9942	15226	11731

State	Estimated No. Of rooms All India at Present - 2018	Estimated Total Manpower All India at Present - 2018	Estimated No. Of Rooms All India - 2022	Estimated Total Manpower All India - 2022	Estimated No. Of Rooms All India – 2025	Estimated Total Manpower All India - 2025
Uttar Pradesh	137800	<b>128582</b>	191297	178500	244654	228288
Uttarakhand	161000	<b>109195</b>	291608	197777	455281	308785
West Bengal	120096	<b>75852</b>	227028	143391	366010	231172
<b>Grand Total</b>	<b>2542240</b>	<b>2291431</b>	<b>3846928</b>	<b>3399842</b>	<b>5520563</b>	<b>4819890</b>

The estimated additional room requirement for 2022 is **13,04,688** and for 2025 is **29,78,323**

The designation wise estimated manpower distribution for the years 2022 and 2025 is presented in the table below.

**Table 3. 13 Designation Wise Estimated Manpower Distribution for the years 2022 and 2025**

Designation	Estimated manpower @ 2022	Estimated manpower @ 2025
General Manager / Manager	18802	26655
Executive Chef	25526	36188
Sous chef	36613	51905
Chef	81912	116126
Line cook	101667	144131
Assistant Staff	131460	186368
Others (dishwasher, etc.)	103381	146561
<b>Total F&amp;B KITCHEN</b>	<b>499361</b>	<b>707934</b>
Head	11372	16123
Restaurant Manager	29508	41832
Banquet Manager	10306	14610
Bartender	20211	28653
Waiter/ Server	226745	321452
Room Service	127364	180562
Other	14135	20038
<b>Total F &amp; B SERVICE</b>	<b>439641</b>	<b>623271</b>
Manager _On the roll	153271	217290
Executive/Supervisor	64920	92036
Room Attendants	387522	549382
Bell Boys	108086	153232
Security Mgr	45547	64571
Transport Mgr	4515	6400

Designation	Estimated manpower @ 2022	Estimated manpower @ 2025
Drivers	32784	46477
Other (specify)	39794	56415
<b>Total House Keeping</b>	<b>836440</b>	<b>1185805</b>
Receptionists	178760	253424
Sales	25488	36134
Customer Service	141537	200654
<b>Total Front Office</b>	<b>345785</b>	<b>490212</b>
HR Head/Manager	27145	38484
HR Executive	13011	18445
Admin Head/Executive	15792	22388
Accounts/Finance Head	44042	62438
Purchase	1084463	1537423
Other (specify)	2362	3349
<b>Total HR/ADMINISTRATION/ACCOUNTS/PURCHASE</b>	<b>1186816</b>	<b>1682526</b>
Public Relations Executive	4191	5941
Gardening	11639	16501
Engineer	10115	14340
Electrician	31203	44236
Quality Control	5334	7562
Plumber/Waterworks	24879	35270
Other - 1	4439	6292
<b>Other Ancillary</b>	<b>91799</b>	<b>130142</b>
<b>Total All Designations</b>	<b>3399842</b>	<b>4819890</b>

The training level wise estimated manpower distribution in accommodation units in future years of 2022 and 205 is presented in the table below.

**Table 3. 14 Training Level wise estimated manpower distribution in Accommodation Units in future years of 2022 and 2025**

Function Wise Manpower At 2022	Formally Trained	On The Job Trained	Untrained	Total
F&B KIT	264520	131460	103381	499361
F&B SERVICE	71397	354109	14135	439641
HOUSE KEEPING	250976	45547	539917	836440
FRONT OFFICE	25488	320297	0	345785
ADMIN	1171443	13011	2362	1186816
OTHERS	14306	5334	72159	91799

Function Wise Manpower At 2022	Formally Trained	On The Job Trained	Untrained	Total
<b>TOTAL</b>	<b>1798130</b>	<b>869758</b>	<b>731954</b>	3399842
Function Wise Manpower At 2025	Formally Trained	On The Job Trained	Untrained	Total
F&B KIT	375005	186368	146561	707934
F&B SERVICE	101218	502014	20038	623271
HOUSE KEEPING	355804	64571	765430	1185805
FRONT OFFICE	36134	454078	0	490212
ADMIN	1660732	18445	3349	1682526
OTHERS	20281	7562	102299	130142
<b>TOTAL</b>	<b>2549174</b>	<b>1233038</b>	<b>1037677</b>	4819890

### 3.1.2.3. Estimated Attrition (including retirement) level at Future in Accommodation Units

The estimated attrition (including retirement) level at future in accommodation establishments is calculated on the basis of the ratios of attrition (including retirement) that is observed in the sample study findings and is presented in the table below.

**Table 3. 15 Estimated attrition (including retirement) level at future in Accommodation Establishments**

Designation	Estimated attrition @ 2022	Estimated attrition @ 2025
General Manager / Manager	838	1188
Executive Chef	952	1350
Sous chef	991	1404
Chef	2629	3727
Line cook	8306	11775
Assistant Staff	8858	12558
Others (dishwasher, etc.)	8363	11856
<b>Total F&amp;B KITCHEN</b>	<b>30936</b>	<b>43858</b>
Head	514	729
Restaurant Manager	762	1080
Banquet Manager	400	567
Bartender	1486	2106
Waiter/ Server	23355	33109
Room Service	9029	12801
Other	1486	2106
<b>Total F &amp; B SERVICE</b>	<b>37032</b>	<b>52500</b>

Designation	Estimated attrition @ 2022	Estimated attrition @ 2025
Manager _On the roll	5581	7913
Executive/Supervisor	6591	9344
Room Attendants	40537	57469
Bell Boys	10172	14421
Security Mgr	1429	2025
Transport Mgr	152	216
Drivers	933	1323
Other (specify)	7086	10046
<b>Total House Keeping</b>	<b>72483</b>	<b>102758</b>
Receptionists	16592	23522
Sales	1029	1458
Customer Service	16040	22739
<b>Total Front Office</b>	<b>33660</b>	<b>47720</b>
HR Head/Manager	591	837
HR Executive	114	162
Admin Head/Executive	0	0
Accounts/Finance Head	76	108
Purchase	0	0
Other (specify)	0	0
<b>Total HR/ADMINISTRATION/ACCOUNTS/PURCHASE</b>	<b>781</b>	<b>1107</b>
Public Relations Executive	38	54
Gardening	133	189
Engineer	438	621
Electrician	400	567
Quality Control	0	0
Plumber/Waterworks	133	189
Other - 1	0	0
<b>Other Ancillary</b>	<b>1143</b>	<b>1620</b>
<b>Total All Designations</b>	<b>176036</b>	<b>249562</b>

## 3.2. Restaurants

### 3.2.1. Estimation at Current Level (All India) in Restaurants

#### 3.2.1.1. Estimated Number of Restaurants in India

The all India estimated total restaurant units are obtained by the following methodology:

Estimated total restaurants in the state/ UT =  $\{(\sum \text{actual total restaurants in representative locations}) / (\sum \text{Total restaurants as per Economic Census 2015 in representative locations})\} / \text{Number of restaurants as per Economic Census 2015 in the state/ UT}$

For example,

Total number of restaurants in Raipur as per Economic Census 2015 = a

Actual total number of restaurants after physical scanning & including trade directory & Economic Census 2015 = b

Total number of restaurants in Chhattisgarh as per Economic Census 2015 = A

Then,

Estimated Total number of restaurants in Chhattisgarh =  $(b/a) * A$

**Table 3. 16 The all India Estimated Total Restaurants (>=10 Seats)**

State	Physical Scanning - Restaurants	Economic Census 2015 - Restaurants in Selected Locations for Study	Economic Census 2015 -State Total Restaurants	Estimated Total Restaurants At Present in All India
Andaman and Nicobar	27	8	24	81
Andhra Pradesh	285	5	805	45885
Arunachal Pradesh	14	2	26	182
Assam	140	3	152	7093
Bihar	212	11	118	2274
Chandigarh	328	112	112	328
Chhattisgarh	113	51	288	638
Dadra Nagar Haveli*			2	2
Daman and Diu	390	7	10	557
Delhi	1163	599	599	1163
Goa	323	73	362	1602
Gujarat	1128	87	894	11591
Haryana	301	54	266	1483

State	Physical Scanning - Restaurants	Economic Census 2015 - Restaurants in Selected Locations for Study	Economic Census 2015 -State Total Restaurants	Estimated Total Restaurants At Present in All India
Himachal Pradesh	434	47	102	942
Jammu and Kashmir	1472	24	65	3987
Jharkhand	204	122	117	196
Karnataka	952	1423	3643	2437
Kerala	693	192	1205	4349
Lakshadweep*				0
Madhya Pradesh	489	86	1563	8887
Maharashtra	4710	2300	3680	7536
Manipur	76	2	2	76
Meghalaya	76	29	54	142
Mizoram*			2	2
Nagaland	45	2	5	113
Odisha	402	48	122	1022
Puducherry	107	56	55	105
Punjab	244	7	277	9655
Rajasthan	1029	63	325	5308
Sikkim	87	22	22	87
Tamil Nadu	823	537	1656	2538
Telangana	974	754	1451	1874
Tripura	85	2	3	128
Uttar Pradesh	1306	169	625	4830
Uttarakhand	1157	112	171	1766
West Bengal	920	256	1465	5265
<b>Total</b>	<b>20709</b>	<b>7265</b>	<b>20268</b>	<b>134124</b>

\* Data on the number of restaurants present from the Economic Census of 2015 for the states of Mizoram, Dadra Nagar Haveli and Lakshadweep (by Ministry of Tourism, Government of India) has been directly used.

The estimated total number of restaurants with more than equal to 10 seats in India is 1,34,124.



**Table 3. 17** Estimated Total No. Of Dhabas/Restaurant (>=10 seats) in the 5 highways covered in Sample study

Sample Survey Highways	Length of highway	Number OF DHABAS ON BOTH SIDES UPTO 100 KMS	Seats present in the Dhabas/ Restaurants (within 100 kms)	Estimated Total number of Dhabas/ restaurants (>=10 seats) in the highways
AHMEDABAD -MUMBAI	526	142	2210	747
DELHI- Chandigarh	240	168	7835	403
DELHI- JAIPUR	246	156	4258	384
CHENNAI- BANGALORE	240	81	1857	194
VARANASI- KOLKATA	686	173	3721	1187
<b>Total</b>	<b>1938</b>	<b>720</b>	<b>19881</b>	<b>2915</b>

The no. of dhabas/ restaurants/ motels on both sides of the selected 5 highways, up to 100km of highway length, was found from the physical scanning exercise. Then the total length of each of the 5 highways was also obtained from a trusted source. As per the methodology stated by Ministry of Tourism, the total no. of Dhabas/restaurants (>=10 seats) then has been calculated for the selected highways for their total length. Thus, the estimated total number of Dhabas/ restaurants with 10 or more seats in the 5 selected highways is 2915.

Using the above information, the estimated total number of Dhabas/ restaurants (>=10 seats) on the total length of National & State Highways was calculated. The total length of National Highways as on 1<sup>st</sup> march 2019 was 1,32,499 kilometres (Kms) and the total length of State Highways as on 2016 was 1,76,166 kilometres (Kms). Hence for the total length of the State & National Highways, the estimated number of Dhabas/ restaurants (>=10 seats) and the estimated manpower, using average seats and manpower obtained from the sample study of 100 kilometres of the 5 highways are presented below.

**Table 3. 18** Estimated Total No. Of Dhabas/Restaurant (>=10 seats) in the National & State Highways

Estimates for Dhabas/ Restaurants (>=10 seats) in National & State Highways of India	Total Length of National & State highways	Average number of Dhabas/ Restaurants (>=10 seats) up to 100 Kms in sample study	Estimated Total number of Dhabas/ restaurants (>=10 seats) in the highways
Total length of National Highways as on 1/3/2019 is 132499 & Total length of State Highways as on 2016 is 176166	308665	144	<b>4,44,478</b>

Hence the total estimated number of restaurants and dhabas with 10 or more seats in India, including those on the National and State Highways is **1,34,124 + 4,44,478**, that is **5,78,602**.

### 3.2.1.2. Estimated Number of Seat and Manpower at Present in India

The estimated total seats and manpower hired in different categories of restaurants ( $\geq 10$  seats) at present in India has been elucidated in the Table below:-

**Table 3. 19** Estimated manpower in different categories of Restaurants

Categories	No. of restaurants in sample	Seats in Sample	Total Manpower in sample	Estimated No. of restaurants in All India	Seats in All India	Estimated manpower hired (in nos.)
Classified Restaurants	4242	182137	60221	58667	2518967	832861
Fast Food Restaurants	3504	118621	38830	48461	1640537	537022
Standalone Restaurants/ Sweet shops	1952	13145	20668	26996	181796	285840
<b>Total</b>	<b>9698</b>	<b>313903</b>	<b>119719</b>	<b>134124</b>	<b>43,41,300</b>	<b>16,55,722</b>

The estimated total seats and manpower hired in dhabas/restaurants ( $\geq 10$  seats) at present in the entire length of National and State Highways in India has been elucidated in the Table below:-

**Table 3. 20** Estimated manpower in Dhabas/ Restaurants ( $\geq 10$  seats) in National & State Highways at Present

Estimates for Dhabas/ Restaurants ( $\geq 10$ seats) in National & State Highways of India	Total Length of National & State highways	Average number of seats in Dhabas/ Restaurants ( $\geq 10$ seats) up to 100 Kms in sample study	Estimated Total number of Seats of Dhabas/ restaurants in the Entire Length of Highways	Estimated Manpower at Present
Total length of National Highways as on 1/3/2019 is 132499 & Total length of State Highways as on 2016 is 176166	308665	3976	<b>122,72,520</b>	<b>36,08,121</b>

Hence the estimated total seats in India, including those present in the National and State Highways are **43,41,300 + 1,22,72,520**, that is, **1,66,13,820 seats.**

Hence the estimated total manpower employed at present in India, including those present in the National and State Highways are **16,55,722 + 36,08,121**, that is, **52,63,843 manpower employed.**

Using the ratio of total number of restaurants establishments for all India to the total number of restaurant establishment for 66 locations under study at present, the corresponding total manpower hired for each designation of restaurant and the total manpower hired over all designations for all India at the present level has been achieved.

The estimated manpower presently employed in the estimated 16,55,720 restaurants in India by different designations has been elucidated in the Table below:-

**Table 3. 21** Estimated manpower deployed in different designations of Restaurants

Designations	Estimated Total Manpower In India @ Present - 2018
General Manager	25461
Executive Chef	21630
Sous Chef	41781
Chef	93090
Line Cook	243216
Assistant Staff	223605
Others (Dishwashers)	176942
<b>Total F&amp;B Kitchen (Xi FBK)</b>	<b>825724</b>
Head (F&B Service)	13706
Restaurant Manager	74641
Banquet Manager	9045
Bar Tender	22667
Waiter	463943
Delivery Boys	56938
<b>Total F&amp;B Service (Xi FBS)</b>	<b>640941</b>
Manager	31450
Supervisor	11368
Security Manager	8353
Cleaning	49360
<b>Total Housekeeping (Xi HK)</b>	<b>100531</b>
Telephonic Order Taker	18754
Customer Service	20150
Front Office	9156
<b>Total Admin (Xi Ad)</b>	<b>48059</b>
HR Head/ Manager	3942
HR Executive	3914
Accounts/ Finance Head	13941
Purchase	12323
Electrician	4578

Quality Control	1770
<b>Total Others (Xi OSC)</b>	<b>40467</b>
<b>Total All Designations</b>	<b>1655722</b>

The level of Training of the manpower presently employed in the estimated 16,55,720 restaurants in India is presented below. This estimate is based on the proportion from the sample restaurants covered in the study.

**Table 3. 22 Level of Training of manpower presently employed in Estimated Restaurants**

Function Wise Manpower At Present	Formally Trained	On The Job Trained	Untrained	Total
F&B KIT	425178	223605	176942	825724
F&B SERVICE	120059	463943	56938	640941
HOUSE KEEPING	42818		57713	100531
ADMIN	18754	29306		48059
OTHERS	36553	3914		40467
<b>TOTAL</b>	<b>643361</b>	<b>720768</b>	<b>291593</b>	<b>1655722</b>

### 3.2.1.3. Estimated Annual Attrition in Restaurants

The estimated annual attrition in different designations in India at present is based on the assumption that the rate of attrition (including retirement) observed in the sample study findings hold true for All India and has been elucidated in the Table below. Using the ratio of total number of restaurants establishments for all India to the total number of restaurant establishment for 66 locations under study at present, the corresponding total attrition(including retirement) for each designation of establishment and the total attrition over all designation for all India at the present level has been achieved.

**Table 3. 23 Estimated annual attrition (including retirement) in India in Restaurants**

Designations	Estimated Total Attrition (Including Retirement) @ Present - 2018
General Manager	609
Executive Chef	692
Sous Chef	719
Chef	1909
Line Cook	6030
Assistant Staff	6431
Others (Dishwashers)	6071
<b>Total F&amp;B Kitchen (Xi FBK)</b>	<b>22460</b>
Head (F&B Service)	373
Restaurant Manager	553

Designations	Estimated Total Attrition (Including Retirement) @ Present - 2018
Banquet Manager	290
Bar Tender	1079
Waiter	16956
Delivery Boys	6555
<b>Total F&amp;B Service (Xi FBS)</b>	<b>25807</b>
Manager	3665
Supervisor	4785
Security Manager	1037
Cleaning	747
<b>Total Housekeeping (Xi HK)</b>	<b>10234</b>
Telephonic Order Taker	29430
Customer Service	11645
Front Office	12046
<b>Total Admin (Xi Ad)</b>	<b>53121</b>
HR Head/ Manager	429
HR Executive	83
Accounts/ Finance Head	55
Purchase	0
Electrician	290
Quality Control	0
<b>Total Others (Xi OSC)</b>	<b>857</b>
<b>Total All Designations</b>	<b>112480</b>

The total attrition (including retirement) over all restaurants (>=10 seats) for all India at the current level is **1,12,480**.

### 3.2.2. Estimation at Future level (All India) in Restaurants

#### 3.2.2.1. Future Seats Requirement in Restaurants

To estimate the requirement of seats in future and on the basis of seats required, the estimated future manpower, the state wise population growth rate from the Census 2011 was used. The growth rate figures used for estimation are presented in the table below.

**Table 3. 24 State Wise Population growth**

Zone	State	Annual Growth (in %)
North	New Delhi	2.096
	Haryana	1.99
	Chandigarh	1.71
	Punjab	1.373
	Jammu and Kashmir	2.371
	Himachal Pradesh	1.281
	Uttarakhand	1.917
	Uttar Pradesh	2.009
Central	Madhya Pradesh	2.03
	Chhattisgarh	2.259
East	Bihar	2.507
	Jharkhand	2.234
	Odisha	1.397
	West Bengal	1.393
West	Rajasthan	2.144
	Goa	0.817
	Gujarat	1.917
	Maharashtra	1.599
	Daman and Diu	5.354
South	Telangana	1.11
	Andhra Pradesh	1.11
	Karnataka	1.567
	Kerala	0.486
	Tamil Nadu	1.56
	Puducherry	2.772
	Andaman and Nicobar	0.668
North East	Assam	1.693
	Meghalaya	2.782
	Sikkim	1.236
	Manipur	1.865
	Tripura	1.475
	Nagaland	-0.047
	Arunachal Pradesh	2.592

The estimated seats in India from 2018 to 2025, based on population growth rate (Census 2011) of states/ UTs is presented in the following table.

Table 3. 25 Estimated Seats in Restaurants from 2018 to 2025

State	Estimated Number of Restaurant (in 2018)	Estimated Seating Capacity – (RESTAURANTS >=10 seats) in 2018 - At present	Estimated Seating Capacity _ (RESTAURANTS >=10 seats) in 2019	Estimated Seating Capacity _ (RESTAURANTS >=10 seats) in 2020	Estimated Seating Capacity _ (RESTAURANTS >=10 seats) in 2021	Estimated Seating Capacity _ (RESTAURANTS >=10 seats) in 2022	Estimated Seating Capacity _ (RESTAURANTS >=10 seats) in 2023	Estimated Seating Capacity _ (RESTAURANTS >=10 seats) in 2024	Estimated Seating Capacity _ (RESTAURANTS >=10 seats) in 2025
Andaman & Nicobar	81	3347	3369	3392	3414	3437	3460	3483	3507
Andhra Pradesh	45885	19846	20066	20289	20514	20742	20972	21205	21441
Arunachal Pradesh	182	2268	2327	2387	2449	2513	2578	2645	2713
Assam	7093	34036	34612	35198	35794	36400	37016	37643	38280
Bihar	2274	31131	31912	32712	33532	34373	35234	36118	37023
Chandigarh	328	76300	77605	78932	80282	81655	83051	84471	85916
Chhattisgarh	638	24493	25046	25612	26191	26782	27387	28006	28639
Daman Diu	557	62360	65699	69216	72922	76826	80939	85273	89838
Delhi	1163	514465	525248	536257	547497	558973	570689	582650	594863
Goa	1602	231999	233895	235806	237732	239675	241633	243607	245597
Gujarat	11591	268953	274109	279364	284719	290177	295740	301409	307187
Haryana	1483	85456	87157	88893	90663	92468	94309	96186	98101
Himachal Pradesh	942	147719	149611	151528	153469	155435	157426	159443	161485
Jammu & Kashmir	3987	123876	126813	129820	132898	136049	139275	142577	145957
Jharkhand	196	33870	34626	35400	36191	36999	37826	38671	39535
Karnataka	2437	135590	137715	139873	142064	144291	146552	148848	151181
Kerala	4349	92744	93195	93648	94103	94561	95020	95482	95946
Madhya Pradesh	8887	61143	62384	63650	64942	66261	67606	68978	70379

Maharashtra	7536	1063546	1080552	1097830	1115384	1133219	1151340	1169750	1188454
Manipur	76	9169	9340	9515	9692	9873	10057	10244	10435
Meghalaya	142	13318	13689	14070	14461	14863	15277	15702	16139
Nagaland	113	8160	8156	8152	8148	8144	8141	8137	8133
Orissa	1022	56344	57131	57929	58738	59559	60391	61234	62090
Puducherry	105	15006	15422	15849	16288	16740	17204	17681	18171
Punjab	9655	39098	39766	40446	41138	41841	42557	43284	44025
Rajasthan	5308	245207	250464	255834	261319	266922	272645	278490	284461
Sikkim	87	19998	20245	20496	20749	21005	21265	21528	21794
Tamil Nadu	2538	125867	127831	129825	131850	133907	135996	138118	140272
Telangana	1874	158092	159846	161621	163415	165229	167063	168917	170792
Tripura	128	13802	14006	14213	14422	14635	14851	15070	15292
Uttar Pradesh	4830	250864	255903	261045	266289	271639	277096	282663	288341
Uttarakhand	1766	230036	234445	238940	243520	248188	252946	257795	262737
West Bengal	5265	143197	145191	147214	149264	151344	153452	155590	157757
*Dadra Nagar Haveli	2	-	-	-	-	-	-	-	-
*Lakshadweep	0	-	-	-	-	-	-	-	-
*Mizoram	2	-	-	-	-	-	-	-	-
<b>Grand Total</b>	<b>134124</b>	<b>4341300</b>	<b>4417379</b>	<b>4494954</b>	<b>4574057</b>	<b>4654724</b>	<b>4736992</b>	<b>4820898</b>	<b>4906481</b>

\*Please note that the state/UT coloured pink was not under coverage in the study and hence no seating capacity for them can be estimated.

Assuming that the manpower per seat ratio for each state/ UT covered under the present study remains the same till 2025, the estimated manpower for the year 2022 and 2025 in restaurant segment in India has been estimated and is presented in the table below.



Table 3. 26 Estimated Manpower for the year 2022 and 2025

State	Estimated Average Manpower Per Seats	Estimated Seating Capacity _ (RESTAURANTS) - All India at Present (2018)	Estimated Total Manpower All India At Present	Estimated Seating Capacity _ (RESTAURANTS) - All India - 2022	Estimated Total Manpower All India - 2022	Estimated Seating Capacity _ (RESTAURANTS) - All India - 2025	Estimated Total Manpower All India - 2025
Andaman and Nicobar	0.35	3347	1176	3437	1207	3507	1232
Andhra Pradesh	0.46	19846	9100	20742	9511	21441	9831
Arunachal Pradesh	0.18	2268	415	2513	460	2713	496
Assam	0.37	34036	12475	36400	13341	38280	14030
Bihar	0.40	31131	12489	34373	13789	37023	14852
Chandigarh	0.35	76300	26485	81655	28343	85916	29822
Chhattisgarh	0.38	24493	9238	26782	10102	28639	10802
Daman Diu	0.41	62360	25669	76826	31623	89838	36979
Delhi	0.34	514465	175849	558973	191063	594863	203330
Goa	0.30	231999	68791	239675	71067	245597	72823
Gujarat	0.40	268953	106713	290177	115134	307187	121883
Haryana	0.34	85456	29264	92468	31666	98101	33595
Himachal Pradesh	0.33	147719	48419	155435	50948	161485	52931
Jammu & Kashmir	0.36	123876	44118	136049	48453	145957	51982
Jharkhand	0.38	33870	13028	36999	14232	39535	15207
Karnataka	0.67	135590	90449	144291	96253	151181	100849
Kerala	0.52	92744	47963	94561	48902	95946	49618
Madhya Pradesh	0.34	61143	21063	66261	22826	70379	24245
Maharashtra	0.37	1063546	391156	1133219	416781	1188454	437095
Manipur	0.23	9169	2102	9873	2263	10435	2392
Meghalaya	0.39	13318	5145	14863	5742	16139	6234
Nagaland	0.21	8160	1743	8144	1739	8133	1737
Orissa	0.39	56344	21893	59559	23142	62090	24126
Puducherry	0.40	15006	5947	16740	6634	18171	7201
Punjab	0.36	39098	14217	41841	15215	44025	16009
Rajasthan	0.36	245207	88734	266922	96592	284461	102939
Sikkim	0.34	19998	6735	21005	7074	21794	7340
Tamil Nadu	0.50	125867	62733	133907	66740	140272	69913

Telangana	0.50	158092	79675	165229	83272	170792	86076
Tripura	0.31	13802	4232	14635	4487	15292	4689
Uttar Pradesh	0.39	250864	97087	271639	105127	288341	111591
Uttarakhand	0.33	230036	75388	248188	81337	262737	86105
West Bengal	0.39	143197	56233	151344	59432	157757	61951
<b>Grand Total</b>	<b>0.38</b>	<b>4341300</b>	<b>1655722</b>	<b>4654724</b>	<b>1774497</b>	<b>4906481</b>	<b>1869906</b>

The additional estimated seats requirement for 2022 is **3,13,424** and for 2025 is **5,65,181**

Using the ratios obtained from the sample survey on the designation wise manpower employed in restaurants, the estimated designation wise manpower expected to be employed in restaurants at 2022 and 2025 is presented as below.

**Table 3. 27 Designation wise estimated manpower in Restaurants for 2022 and 2025**

Designations	Estimated Total Manpower @ 2022	Estimated Total Manpower @ 2025
General Manager	27288	28755
Executive Chef	23182	24428
Sous Chef	44778	47185
Chef	99768	105132
Line Cook	260663	274678
Assistant Staff	239645	252530
Others (Dishwashers)	189635	199831
<b>Total F&amp;B Kitchen (Xi FBK)</b>	<b>884958</b>	<b>932540</b>
Head (F&B Service)	14689	15479
Restaurant Manager	79995	84296
Banquet Manager	9694	10215
Bar Tender	24294	25600
Waiter	497225	523959
Delivery Boys	61023	64304
<b>Total F&amp;B Service (Xi FBS)</b>	<b>686919</b>	<b>723853</b>
Manager	33706	35518
Supervisor	12184	12839
Security Manager	8953	9434
Cleaning	52900	55745
<b>Total Housekeeping (Xi HK)</b>	<b>107742</b>	<b>113535</b>
Telephonic Order Taker	20099	21180
Customer Service	21596	22757
Front Office	9812	10340
<b>Total Admin (Xi Ad)</b>	<b>51507</b>	<b>54276</b>
HR Head/ Manager	4224	4451
HR Executive	4195	4420
Accounts/ Finance Head	14941	15744

Purchase	13207	13917
Electrician	4906	5170
Quality Control	1897	1999
<b>Total Others (Xi OSC)</b>	<b>43370</b>	<b>45702</b>
<b>Total All Designations</b>	<b>1774497</b>	<b>1869906</b>

The estimated manpower employed by restaurants with 10 or more seats by function and also by level of training is presented below. Please note that the calculations are based on the assumption that the ratios observed in the sample survey findings hold true at 2022 and 2025.

**Table 3. 28 Level Wise estimated trained manpower for 2022 and 2025 in Restaurants**

Function Wise Manpower At 2022	Formally Trained	On The Job Trained	Untrained	Total
F&B KIT	455678	239645	189635	884958
F&B SERVICE	128671	497225	61023	686919
HOUSE KEEPING	45889		61853	107742
ADMIN	20099	31408		51507
OTHERS	39175	4195		43370
<b>TOTAL</b>	<b>689513</b>	<b>772473</b>	<b>312511</b>	<b>1774497</b>
Function Wise Manpower At 2025	Formally Trained	On The Job Trained	Untrained	Total
F&B KIT	480179	252530	199831	932540
F&B SERVICE	135590	523959	64304	723853
HOUSE KEEPING	48357		65179	113535
ADMIN	21180	33097		54276
OTHERS	41281	4420		45702
<b>TOTAL</b>	<b>726586</b>	<b>814006</b>	<b>329314</b>	<b>1869906</b>

For estimating the number of seats in 2022 and 2025 for dhabas/ restaurants with 10 or more seats, it is again assumed that the manpower per seat obtained from the sample study at present will remain the same till 2025 and the growth rate of the National & State highways has been used to estimate the dhabas/ restaurants and hence the seats in future. The following table depicts the estimated seats and manpower for dhabas/ restaurants on National & State Highways at 22 and 2025.

**Table 3. 29 Estimated number of seats and manpower in Dhabas/Restaurants (>=10 seats) in National & State Highways for 2022 and 2025**

Estimation for 2021-22 for Seats & Manpower in Dhabas/ Restaurants (>=10seats) in National & State Highways		Estimation for 2024-25 for Seats & Manpower in Dhabas/ Restaurants (>=10seats) in National & State Highways	
Total length of National & State Highway in year 2021-22 in Kms	343465	Total length of National & State Highway in year 2024-25 in Kms	375904
Average number of seats in Dhabas/	3976	Average number of seats in	3976

Estimation for 2021-22 for Seats & Manpower in Dhabas/ Restaurants (>=10seats) in National & State Highways		Estimation for 2024-25 for Seats & Manpower in Dhabas/ Restaurants (>=10seats) in National & State Highways	
Restaurants (>=10 seats) upto 100 Kms in sample study (Assumption: It will stay the same in 2022)		Dhabas/ Restaurants (>=10 seats) upto 100 Kms in sample study (Assumption: It will stay the same in 2022)	
Average manpower per 10 seats in Dhabas/ Restaurants (>=10 seats) upto 100 Kms in sample study (Assumption: It will stay the same in 2022)	2.94	Average manpower per 10 seats in Dhabas/ Restaurants (>=10 seats) upto 100 Kms in sample study (Assumption: It will stay the same in 2022)	2.94
Estimated Total number of Seats of Dhabas/ restaurants in the Entire Length of Highways	<b>136,56,168</b>	Estimated Total number of Seats of Dhabas/ restaurants in the Entire Length of Highways	<b>149,45,943</b>
Estimated Manpower in Dhabas/ Restaurants (>=10 seats) at 2021-22	<b>40,14,914</b>	Estimated Manpower in Dhabas/ Restaurants (>=10 seats) at 2024-25	<b>43,94,107</b>

The estimated total number of seats (both restaurants and dhabas/ restaurants in National & State Highways) at present level is **166,13,820** and the total number of seats estimated at 2022 is **183,10,892** and at 2025 is **198,52,424**.

The estimated total number of manpower (both restaurants and dhabas/ restaurants in National & State Highways) at present level is **52,63,843** and the total number of seats estimated at 2022 is **57,89,411** and at 2025 **62,64,013**.

### 3.2.2.2. Estimated Attrition (including retirement) for 2022 and 2025

The estimated attrition (including retirement) if calculated for the years 2022 and 2025 with the underlying assumption that the level of attrition (including retirement) will stay the same as observed at present in the sample study findings of restaurants. The estimated attrition (including retirement) in India forecasted for 2022 and 2025 is presented in the following table.

**Table 3. 30 Estimated Attrition (including retirement) in different designations of Restaurants for 2022 and 2025**

Designations	Estimated Total Attrition (Including Retirement) @ 2022	Estimated Total Attrition (Including Retirement) @ 2025
General Manager	652	687
Executive Chef	741	781
Sous Chef	771	812

Designations	Estimated Total Attrition (Including Retirement) @ 2022	Estimated Total Attrition (Including Retirement) @ 2025
Chef	2045	2155
Line Cook	6462	6810
Assistant Staff	6892	7263
Others (Dishwashers)	6507	6857
<b>Total F&amp;B Kitchen (Xi FBK)</b>	<b>24071</b>	<b>25365</b>
Head (F&B Service)	400	422
Restaurant Manager	593	625
Banquet Manager	311	328
Bar Tender	1156	1218
Waiter	18172	19149
Delivery Boys	7026	7403
<b>Total F&amp;B Service (Xi FBS)</b>	<b>27658</b>	<b>29145</b>
Manager	3928	4139
Supervisor	5128	5404
Security Manager	1112	1171
Cleaning	800	843
<b>Total Housekeeping (Xi HK)</b>	<b>10968</b>	<b>11558</b>
Telephonic Order Taker	31542	33237
Customer Service	12480	13151
Front Office	12910	13604
<b>Total Admin (Xi Ad)</b>	<b>56932</b>	<b>59993</b>
HR Head/ Manager	459	484
HR Executive	89	94
Accounts/ Finance Head	59	62
Purchase	0	0
Electrician	311	328
Quality Control	0	0
<b>Total Others (Xi OSC)</b>	<b>919</b>	<b>968</b>
<b>Total All Designations</b>	<b>120549</b>	<b>127030</b>

### 3.3. Tour Operator and Travel Agents

#### 3.3.1. Estimation at Current Level (All India) for Tour Operators and Travel Agents

##### 3.3.1.1. Estimated Number of Units for Tour Operators

The all India estimated total tour operators and travel agents units are obtained by the following methodology:

Estimated total tour operators in the state/ UT =  $\{(\sum \text{actual total tour operators in representative locations}) / (\sum \text{Total tour operators as per Economic Census 2015 in representative locations})\} / \text{Number of tour operators as per Economic Census 2015 in the state/ UT}$

For example,

Total number of tour operators in Raipur as per Economic Census 2015 = a

Actual total number of tour operators after physical scanning & including trade directory & Economic Census 2015 = b

Total number of tour operators in Chhattisgarh as per Economic Census 2015 = A

Then,

Estimated Total number of tour operators in Chhattisgarh =  $(b/a) * A$

**Table 3. 31 The all India Estimated Total tour operators**

State	Physical Scanning - Tour Operators	Economic Census 2015 - Tour Operators in Selected Locations for Study	Economic Census 2015 - State Total Tour Operators	Estimated Total Tour Operators At Present in All India
Andaman and Nicobar	29	5	5	29
Andhra Pradesh	116	1	13	1508
<b>Arunachal Pradesh#</b>	17		2	<b>19</b>
Assam	99	7	20	283
Bihar	81	1	1	81

State	Physical Scanning - Tour Operators	Economic Census 2015 - Tour Operators in Selected Locations for Study	Economic Census 2015 - State Total Tour Operators	Estimated Total Tour Operators At Present in All India
Chandigarh	74	25	25	74
Chhattisgarh	20	7	10	29
Dadra Nagar Haveli*			1	1
Daman and Diu#	20			20
Delhi	403	174	174	403
Goa	100	16	16	100
Gujarat	261	22	30	356
Haryana	60	14	19	81
Himachal Pradesh	343	5	10	686
Jammu and Kashmir	112	1	5	560
Jharkhand	31	1	2	62
Karnataka	249	106	161	378
Kerala	163	21	258	2003
Lakshadweep*				0
Madhya Pradesh	64	3	17	363
Maharashtra	901	246	283	1037
Manipur#	110			110
Meghalaya	66	2	10	330
Mizoram*			1	1
Nagaland	32	1	1	32
Odisha	212	3	3	212
Puducherry	15	4	4	15
Punjab	221	1	7	1547
Rajasthan	249	12	16	332
Sikkim#	174			174
Tamil Nadu	338	25	42	568

State	Physical Scanning - Tour Operators	Economic Census 2015 - Tour Operators in Selected Locations for Study	Economic Census 2015 - State Total Tour Operators	Estimated Total Tour Operators At Present in All India
Telangana	327	53	100	<b>617</b>
Tripura	106	2	2	<b>106</b>
Uttar Pradesh	164	15	25	<b>273</b>
Uttarakhand	564	5	6	<b>677</b>
West Bengal	182	21	36	<b>312</b>
<b>Total</b>	<b>5903</b>	<b>799</b>	<b>1305</b>	<b>13378</b>

\* Data on the number of tour operators present from the Economic Census of 2015 for the states of Mizoram, Dadra Nagar Haveli and Lakshadweep (by Ministry of Tourism, Government of India) has been directly used.

#Data was not available on the number of tour operators present from the Economic Census of 2015 for the states of Arunachal Pradesh, Daman and Diu, Manipur and Sikkim. Thus the data from Physical Scanning has been directly used for Estimating total tour operators for All India.



### 3.3.1.2. Estimated Manpower Hired in Tour Operators

The estimated number of manpower employed at present by tour operators in India is presented in the following table.

**Table 3. 32 Estimated manpower hired in Travel Agents and Tour Operators**

Tour Operator Units in Sample	Tours Conducted by Operators in Sample	Manpower Employed by Tour Operators in sample	Estimated Number of Tour Operator units in All India	Tours Conducted by Operators in All India	Estimated manpower hired (in nos.) All India
1998	756647	18192	13378	5223129	125579

Using the ratio of total number of tour operators for all India to the total number of tour operators for 66 locations under study at present, the corresponding total manpower hired for each designation of establishment and the total manpower hired over all designations for all India at the present level has been achieved.

**Table 3. 33 Estimated manpower at present for different designations in Tour Operators**

Designation	Estimated Manpower @ present - 2018
Branch Manager	15901
Marketing Manager	3066
Operations Manager	4351
Team Leader	4623
Travel Counsellor	7737
Messenger	6194
Sales Manager	2577
Deputy Manager Sales	475
Executive	11194
Ushers	698
Guide	28191
Drivers	34330
Others	6166
<b>All Designations</b>	<b>125503</b>

The total manpower hired over all tour operators for all India at the current level is **1,25,503**.

### 3.3.1.3. Estimated Annual Attrition in Tour Operators

Using the ratio of total number of tour operator’s establishments for all India to the total number of tour operators for 66 locations under study at present, the corresponding total attrition (including retirement) for each designation of tour operator and the total attrition over all designation for all India at the present level has been achieved.

The estimated annual attrition in different designations has been elucidated in the Table below:-

**Table 3. 34** Estimated attrition (including retirement) in Travel Agents and Tour Operators at present

Departments	Estimated attrition ( including retirement) @ present
Ticketing	1738
Accounts	1338
Tours	1932
Administration	324
Operations	5429
Sales & Marketing	3401
Foreign & Exchange	0
IT	21
Customer Support	21
Other	1566
<b>Total</b>	<b>15771</b>

**The total attrition (including retirement) over all tour operator for all India at the current level is 15,771.**

### 3.3.2. Estimation at Future Level (All India) for Tour Operators and Travel Agents

#### 3.3.2.1. Estimated Manpower Employed in Tour Operators Units

The estimation of total manpower to be employed in tour operator units in India is estimated by factoring the growth of tours conducted by tour operators. It is assumed that the number of tours conducted by operators/ agents is directly proportional to the growth of domestic and foreign tourists<sup>4</sup> in India. Hence using the growth rate of domestic and foreign tourists in India the estimated number of tours conducted by operators is calculated. The domestic and foreign tourist growth rate used for is presented in the table below.

<sup>4</sup> Source: India Tourism Statistics, Ministry of Tourism, Government of India

**Table 3. 35 Growth Rate of Domestic and Foreign Tourists in India**

State/UT	Growth Rate of Domestic & Foreign Tourists in India
Andaman & Nicobar Islands	17%
Andhra Pradesh	21%
Arunachal Pradesh	34%
Assam	8%
Bihar	13%
Chandigarh	10%
Chhattisgarh	-21%
Daman & Diu	3%
Delhi	8%
Goa	24%
Gujarat	16%
Haryana	-24%
Himachal Pradesh	6%
Jammu & Kashmir	15%
Jharkhand	0%
Karnataka	15%
Kerala	8%
Madhya Pradesh	7%
Maharashtra	8%
Manipur	10%
Meghalaya	11%
Nagaland	3%
Odisha	9%
Puducherry	9%
Punjab	19%
Rajasthan	11%
Sikkim	33%
Tamil Nadu	2%
Tripura	6%
Telangana	6%
Uttar Pradesh	9%
Uttarakhand	16%
West Bengal	17%

The estimated number of tours conducted from 2018 (at present) till 2025 is estimated from the proportion of tours conducted in the sample of tour operators/ agents surveyed and on the growth rate of domestic and foreign tourists in India as presented above. The estimated number of tours conducted from 2018 (at present) till 2025 is presented below.

**Table 3. 36** Estimated Total Number of Tours Conducted from 2018 - 2025 (All India Level)

State	Estimated Tours Conducted in 2018	Estimated Tours Conducted in 2019	Estimated Tours Conducted in 2020	Estimated Tours Conducted in 2021	Estimated Tours Conducted in 2022	Estimated Tours Conducted in 2023	Estimated Tours Conducted in 2024	Estimated Tours Conducted in 2025
Andaman & Nicobar	14248	16704	19582	22958	26915	31554	36992	43368
Andhra Pradesh	0	0	0	0	0	0	0	0
Arunachal Pradesh	22676	30459	40912	54953	73813	99145	133171	178874
Assam	4100	4420	4765	5137	5538	5971	6437	6939
Bihar	54934	61934	69827	78725	88757	100068	112820	127197
Chandigarh	1243	1369	1508	1662	1831	2017	2223	2449
Chhattisgarh	359	285	226	179	142	113	90	71
Daman Diu	1691371	1735253	1780273	1826461	1873848	1922463	1972341	2023512
Delhi	22780	24714	26812	29089	31559	34238	37145	40299
Goa	7172	8894	11028	13675	16956	21026	26072	32329
Gujarat	27267	31667	36778	42713	49606	57611	66909	77707
Haryana	95096	72672	55535	42440	32433	24785	18940	14474
Himachal Pradesh	304526	323740	344167	365883	388970	413512	439604	467342
Jammu & Kashmir	83	95	109	124	143	163	187	214
Jharkhand	52877	53040	53204	53369	53534	53699	53865	54031
Karnataka	548201	630117	724273	832499	956897	1099883	1264235	1453145
Kerala	130812	140889	151742	163431	176020	189580	204184	219913
Madhya Pradesh	323937	346730	371127	397241	425192	455109	487132	521409
Maharashtra	104	112	121	131	141	152	165	178
Manipur	19674	21620	23758	26108	28691	31529	34648	38075
Meghalaya	207	231	257	286	319	356	396	441
Nagaland	14662	15078	15506	15946	16398	16863	17342	17834
Orissa	1104	1205	1315	1435	1566	1708	1864	2034
Puducherry	114728	125480	137239	150101	164168	179553	196380	214784
Punjab	1103443	1313844	1564363	1862650	2217813	2640698	3144216	3743744
Rajasthan	17085	18991	21111	23466	26085	28996	32232	35828
Sikkim	30615	40586	53805	71330	94563	125362	166194	220324
Tamil Nadu	205571	209161	212813	216529	220310	224157	228071	232054
Telangana	345	368	391	417	444	473	504	536
Tripura	150347	158874	167885	177407	187469	198102	209337	221210
Uttar Pradesh	236034	256206	278102	301869	327667	355670	386067	419061

Uttarakhand	21744	25226	29264	33949	39384	45689	53004	61489
West Bengal	5785	6783	7953	9326	10935	12822	15035	17630
*Dadra Nagar Haveli	-	-	-	-	-	-	-	-
*Lakshadwe ep	-	-	-	-	-	-	-	-
*Mizoram	-	-	-	-	-	-	-	-
<b>Grand Total</b>	<b>5223129</b>	<b>5676745</b>	<b>6205754</b>	<b>6821489</b>	<b>7538106</b>	<b>8373069</b>	<b>9347800</b>	<b>10488496</b>

\* Please note that the state/ UT coloured pink, was not under coverage in the study and hence estimation of tours conducted is not done for these 3 stats/ UT.

The estimated total manpower employed by tour operators and travel agents is calculated based on the assumption that the ration of manpower to number of tours conducted by tour operators obtained from the sample study at present will remain the same till the year 2025. Hence the estimated manpower employed by tour operators and travels agents at 2022 and at 2025 is presented in the following table.

**Table 3. 37 Estimated Manpower in Tour and Travel Operators for 2022 and 2025**

State	Estimated Tour Conducted - All India - 2022	Estimated Total Manpower All India – 2022	Estimated Tour Conducted All India - 2025	Estimated Total Manpower All India - 2025
Andaman and Nicobar	26915	10119	43368	16305
Andhra Pradesh	0	0	0	0
Arunachal Pradesh	73813	2966	178874	7188
Assam	5538	1026	6939	1285
Bihar	88757	1528	127197	2190
Chandigarh	1831	498	2449	667
Chhattisgarh	142	71	71	36
Daman Diu	1873848	6600	2023512	7127
Delhi	31559	2152	40299	2748
Goa	16956	7980	32329	15216
Gujarat	49606	1482	77707	2321
Haryana	32433	1330	14474	594
Himachal Pradesh	388970	49702	467342	59717
Jammu & Kashmir	143	309	214	464
Jharkhand	53534	4172	54031	4211
Karnataka	956897	5748	1453145	8728
Kerala	176020	3121	219913	3899

State	Estimated Tour Conducted - All India - 2022	Estimated Total Manpower All India – 2022	Estimated Tour Conducted All India - 2025	Estimated Total Manpower All India - 2025
Madhya Pradesh	425192	15938	521409	19544
Maharashtra	141	423	178	534
Manipur	28691	725	38075	962
Meghalaya	319	255	441	353
Nagaland	16398	4184	17834	4551
Orissa	1566	333	2034	432
Puducherry	164168	6450	214784	8439
Punjab	2217813	6216	3743744	10492
Rajasthan	26085	3900	35828	5356
Sikkim	94563	15970	220324	37209
Tamil Nadu	220310	6636	232054	6990
Telangana	444	542	536	654
Tripura	187469	6757	221210	7973
Uttar Pradesh	327667	5491	419061	7023
Uttarakhand	39384	2188	61489	3416
West Bengal	10935	5624	17630	9067
<b>Grand Total</b>	<b>7538106</b>	<b>180436</b>	<b>10488496</b>	<b>255690</b>

Hence the estimated total manpower at present is 1,25,503 and at 2022 is 1,80,436 and at 2025 is 2,55,690.

The designation wise estimated manpower expected to be employed in tour operator units in 2022 and 2025 is presented below.

**Table 3. 38 Designation Wise estimated manpower in Tour Operator for 2022 and 2025**

Designation	Estimated Manpower @ 2022	Estimated Manpower @ 2025
Branch Manager	22861	32395
Marketing Manager	4407	6246
Operations Manager	6255	8864
Team Leader	6646	9418
Travel Counsellor	11124	15764
Messenger	8905	12619
Sales Manager	3705	5250
Deputy Manager Sales	683	967
Executive	16094	22806
Ushers	1004	1423

Designation	Estimated Manpower @ 2022	Estimated Manpower @ 2025
Guide	40531	57435
Drivers	49356	69941
Others	8865	12563
<b>All Designations</b>	<b>180436</b>	<b>255690</b>

The estimated attrition for the years 2022 and 2025 is estimated with the underlying assumption that the ratio of attrition by designation, as observed in the sample study findings for tour operators/ travel agent establishments, will remain the same till the year of 2025.

**Table 3. 39 Designation wise attrition (including retirement) for Tour Operators for 2022 and 2025**

Departments	Estimated attrition @ 2022	Estimated attrition @ 2025
Ticketing	2499	3542
Accounts	1924	2727
Tours	2777	3935
Administration	466	661
Operations	7806	11061
Sales & Marketing	4890	6929
Foreign & Exchange	0	0
IT	30	42
Customer Support	30	42
Other	2251	3191
<b>Total</b>	<b>22674</b>	<b>32130</b>

### 3.4. Spa and Wellness Units

#### 3.4.1. Estimation at Current Level (All India) for Spa and Wellness Units

##### 3.4.1.1. Estimated Number of Spa and Wellness Units

The all India estimated total Spa and Wellness Units are obtained by the following methodology:

Estimated total wellness units in the state/ UT =  $\{(\sum \text{actual total wellness units in representative locations}) / (\sum \text{Total wellness units as per Economic Census 2015 in representative locations})\} \times \text{Number of wellness units as per Economic Census 2015 in the state/ UT}$

For example,

Total number of wellness units in Raipur as per Economic Census 2015 = a

Actual total number of wellness units after physical scanning & including trade directory & Economic Census 2015 = b

Total number of wellness units in Chhattisgarh as per Economic Census 2015 = A

Then,

Estimated Total number of wellness units in Chhattisgarh =  $(b/a) \times A$

**Table 3. 40 The all India Estimated Total wellness units**

State	Physical Scanning - Wellness Units	Economic Census 2015 - Wellness Units in Selected Locations for Study	Economic Census 2015 - State Total Wellness Units	Estimated Total Wellness Units At Present in All India
Andaman and Nicobar	3	16	42	8
Andhra Pradesh	40	47	1173	998
Arunachal Pradesh*	0	0	57	57
Assam	16	4	849	3396
Bihar	29	28	341	353
Chandigarh	26	46	46	26
Chhattisgarh	10	2	9	45
Dadra Nagar Haveli*			6	6
Daman and Diu	13	3	3	13
Delhi	95	684	684	95



State	Physical Scanning - Wellness Units	Economic Census 2015 - Wellness Units in Selected Locations for Study	Economic Census 2015 - State Total Wellness Units	Estimated Total Wellness Units At Present in All India
Goa	100	109	109	100
Gujarat	52	103	1096	553
Haryana	72	63	658	752
Himachal Pradesh	32	82	307	120
Jammu and Kashmir	18	77	353	83
Jharkhand	17	2	171	1454
Karnataka	116	457	2584	656
Kerala	52	103	82	41
Lakshadweep*				
Madhya Pradesh	27	98	522	144
Maharashtra	192	775	3458	857
Manipur	8	21	72	27
Meghalaya	4	16	120	30
Mizoram*			77	77
Nagaland	9	5	68	122
Odisha	32	71	124	56
Puducherry	10	86	86	10
Punjab	18	6	751	2253
Rajasthan	71	243	1508	441
Sikkim	5	28	31	6
Tamil Nadu	103	463	1760	392
Telangana	50	346	1327	192
Tripura	5	22	113	26
Uttar Pradesh	125	270	1335	618
Uttarakhand	129	124	328	341
West Bengal	57	149	224	86
<b>Total</b>	<b>1536</b>	<b>4549</b>	<b>20474</b>	<b>14432</b>

\* Data on the number of wellness units present from the Economic Census of 2015 for the states of Mizoram, Dadra Nagar Haveli and Lakshadweep (by Ministry of Tourism, Government of India) has been directly used.

### 3.4.1.2. Estimated Manpower Hired in Spa and Wellness Units

The estimated manpower present in India in the spa and wellness segment is estimated using the information obtained from the sample survey on the basis of the reported number of tourists attended to in the sample study findings. The estimated manpower at present in the segment in India is presented in the table below.

**Table 3. 41** Estimated annual manpower hired in Spa and Wellness Units

Spa Units in Sample	Tourists Attended to in Sample	Manpower in sample	No. of spa units in All India	Tourists Attended to in All India	Estimated manpower hired (in nos.) All India
206	13816	1072	14432	967925	75102

Using the ratio of total number of wellness units for all India to the total number of wellness units for 66 locations under study at present, the corresponding total manpower hired for each designation of wellness units and the total manpower hired over all designations for all India at the present level has been achieved. The designation wise estimated manpower for All India is presented in the table below.

**Table 3. 42** Designation wise estimated manpower at present for Spa and Wellness Units

Designation	Estimated Total Manpower @ Present - 2018
Manager (In charge, Owner)	10192
Physiotherapist (Massage Specialist, Aroma therapist...etc.)	24139
Beautician (hair specialist, barber, Pedicure...etc.)	11146
Reception (Front Office)	1788
Worker (Room Service, Sweeper, Cleaning Staff, Housekeeping...etc.)	7689
Accountant, Cashier	1907
Assistant	5841
Supervisor	1192
<b>Total</b>	<b>63,893</b>

The total manpower hired over all wellness units for all India at the current level is 63,893.

### 3.4.1.3. Estimated Annual Attrition in Spa and Wellness Units

Using the ratio of total number of wellness units establishments for all India to the total number of wellness units for 66 locations under study at present, the corresponding total attrition (including retirement) for each designation of wellness units and the total attrition over all designation for all India at the present level has been achieved. The estimated annual attrition in different designations has been elucidated in the Table below:-

**Table 3. 43** Estimated annual attrition in Spa and Wellness Units

Designation	Estimated Total Attrition @ Present - 2018
Manager (In charge, Owner)	119
Physiotherapist (Massage Specialist, Aroma therapist...etc.)	3695
Beautician (hair specialist, barber, Pedicure...etc.)	1132
Reception (Front Office)	0
Worker (Room Service, Sweeper, Cleaning Staff, Housekeeping...etc.)	596
Accountant, Cashier	0
Assistant	0
Supervisor	0
<b>Total</b>	<b>5543</b>

The total attrition (including retirement) over all wellness units for all India at the current level is 5543.

### 3.4.2. Estimation at Future Level (All India) for Spa and Wellness Units

#### 3.4.2.1. Estimated Number of Spa and Wellness Units

The all India estimated total Spa and Wellness Units are obtained by using the growth rate of domestic and foreign tourist in India by states/ UTs. This is done since Nielsen has collected information on the domestic and foreign tourists annually attended to by the spa and wellness units surveyed. It is assumed that the rate of growth of domestic and foreign tourists to the states/ UTs of India is directly proportional to the clientele of the spas and wellness units. The growth rate used is presented in the following table.

**Table 3. 44** Domestic and Foreign Tourist Growth Rate in India

State/UT	Domestic & Foreign Tourist Growth Rate
Andhra Pradesh	21%
Assam	8%
Chandigarh	13%
Chhattisgarh	10%
Daman & Diu	-21%
Delhi	3%
Goa	8%
Gujarat	24%
Haryana	16%
Himachal Pradesh	-24%
Jammu & Kashmir	6%
Jharkhand	15%
Karnataka	0%
Kerala	15%
Madhya Pradesh	8%
Maharashtra	7%
Manipur	8%
Meghalaya	10%
Nagaland	11%
Orissa	3%
Patna	9%
Puducherry	9%
Punjab	19%
Rajasthan	11%
Sikkim	33%
Tamil Nadu	2%
Telangana	6%
Tripura	6%
Uttar Pradesh	9%
Uttarakhand	16%
West Bengal	17%

Using the above growth rates and the ratios obtained in the sample study the estimate of tourists attended to by the spa/ wellness units is arrived at. The estimated clientele for the year 2022 and 2025 is presented below.

**Table 3. 45 Estimated Tourists visited in Spa and Wellness Units from 2019 to 2025**

State	Estimated Tourists Visited in 2019	Estimated Tourists Visited in 2020	Estimated Tourists Visited in 2021	Estimated Tourists Visited in 2022	Estimated Tourists Visited in 2023	Estimated Tourists Visited in 2024	Estimated Tourists Visited in 2025
Andhra Pradesh	22732	27521	33320	40341	48841	59132	71591
Assam	7553	8142	8778	9463	10201	10998	11856
Chandigarh	53552	60377	68071	76745	86525	97551	109983
Chhattisgarh	14434	15904	17523	19306	21272	23437	25823
Daman & Diu	0	0	0	0	0	0	0
Delhi	107814	110611	113481	116425	119445	122544	125724
Goa	77147	83697	90804	98513	106878	115952	125798
Gujarat	0	0	0	0	0	0	0
Haryana	0	0	0	0	0	0	0
Himachal Pradesh	5354	4091	3127	2389	1826	1395	1066
Jammu & Kashmir	6778	7205	7660	8143	8657	9203	9784
Jharkhand	24556	28128	32219	36905	42274	48422	55466
Karnataka	49333	49485	49638	49792	49946	50100	50255
Kerala	28184	32396	37237	42801	49196	56548	64997
Madhya Pradesh	15091	16254	17506	18854	20306	21871	23556
Maharashtra	76113	81468	87200	93336	99904	106933	114457
Manipur	0	0	0	0	0	0	0
Meghalaya	6159	6768	7438	8174	8982	9871	10847
Nagaland	7806	8697	9690	10796	12028	13401	14931
Orissa	7349	7557	7772	7992	8219	8452	8692
Patna	12231	13346	14562	15890	17338	18918	20643
Puducherry	3678	4023	4400	4812	5263	5756	6296
Punjab	3754	4470	5322	6336	7545	8983	10696
Rajasthan	22584	25104	27906	31020	34481	38329	42606
Sikkim	0	0	0	0	0	0	0
Tamil Nadu	23879	24296	24721	25152	25591	26038	26493
Telangana	34321	36550	38925	41454	44148	47016	50071
Tripura	0	0	0	0	0	0	0
Uttar Pradesh	256806	278753	302576	328434	356503	386971	420042
Uttarakhand	141336	163963	190212	220664	255991	296974	344518
West Bengal	46660	54712	64154	75225	88206	103427	121276

State	Estimated Tourists Visited in 2019	Estimated Tourists Visited in 2020	Estimated Tourists Visited in 2021	Estimated Tourists Visited in 2022	Estimated Tourists Visited in 2023	Estimated Tourists Visited in 2024	Estimated Tourists Visited in 2025
Andaman & Nicobar	0	0	0	0	0	0	0
Arunachal Pradesh	0	0	0	0	0	0	0
*Dadra Nagar Haveli	-	-	-	-	-	-	-
*Lakshadweep	-	-	-	-	-	-	-
*Mizoram	-	-	-	-	-	-	-
<b>Grand Total</b>	<b>1055202</b>	<b>1153519</b>	<b>1264238</b>	<b>1388963</b>	<b>1529566</b>	<b>1688224</b>	<b>1867464</b>

\* Please note that the states/ UTs coloured pink are the ones which were outside the study coverage and hence estimates are not provided for the same.

The estimated total manpower employed by the spa/ wellness units in India at 2022 and 2025 is calculated with the underlying assumption that the per-tourist manpower that is observed in the sample study at present will remain the same till 2025 for all the states/ UTs covered in the study. The estimated manpower expected to be employed in the spa/ wellness units in 2022 and 2025 is presented in the following table.

**Table 3. 46 Estimated manpower in Spa and Wellness Units for 2022 and 2025**

State	Estimated Tourist Visited - All India - 2022	Estimated Total Manpower All India - 2022	Estimated Tourist visited All India - 2025	Estimated Total Manpower All India - 2025
Andhra Pradesh	40341	2559	71591	4541
Assam	9463	4353	11856	5454
Chandigarh	76745	3735	109983	5353
Chhattisgarh	19306	3304	25823	4419
Daman & Diu	0	0	0	0
Delhi	116425	12341	125724	13327
Goa	98513	3300	125798	4214
Gujarat	0	0	0	0
Haryana	0	0	0	0
Himachal Pradesh	2389	908	1066	405
Jammu & Kashmir	8143	1879	9784	2258
Jharkhand	36905	3739	55466	5619
Karnataka	49792	3050	50255	3078
Kerala	42801	2201	64997	3343
Madhya Pradesh	18854	8673	23556	10836

State	Estimated Tourist Visited - All India - 2022	Estimated Total Manpower All India - 2022	Estimated Tourist visited All India - 2025	Estimated Total Manpower All India - 2025
Maharashtra	93336	11679	114457	14321
Manipur	0	0	0	0
Meghalaya	8174	307	10847	407
Nagaland	10796	1080	14931	1493
Orissa	7992	313	8692	341
Patna	15890	596	20643	774
Puducherry	4812	401	6296	525
Punjab	6336	2675	10696	4516
Rajasthan	31020	1497	42606	2057
Sikkim	0	0	0	0
Tamil Nadu	25152	2403	26493	2531
Telangana	41454	3064	50071	3701
Tripura	0	0	0	0
Uttar Pradesh	328434	3793	420042	4851
Uttarakhand	220664	2538	344518	3962
West Bengal	75225	4768	121276	7686
<b>Grand Total</b>	<b>1388963</b>	<b>85155</b>	<b>1867464</b>	<b>110011</b>

The attrition (including retirement) of manpower is estimated using the ratios obtained on attrition from the sample survey of spa/ wellness units and is presented for the years 2022 and 2025 in the table below.

**Table 3. 47 Estimated attrition (including retirement) in Spa and Wellness Units for 2022 and 2025**

Designation	Estimated Total Attrition @ 2022	Estimated Total Attrition @ 2025
Manager (In charge, Owner)	159	205
Physiotherapist (Massage Specialist, Aroma therapist...etc.)	4925	6363
Beautician (hair specialist, barber, Pedicure...etc.)	1509	1950
Reception (Front Office)	0	0
Worker (Room Service, Sweeper, Cleaning Staff, Housekeeping...etc.)	794	1026
Accountant, Cashier	0	0
Assistant	0	0
Supervisor	0	0
<b>Total</b>	<b>7388</b>	<b>9544</b>

### 3.5. Outdoor Banquets

#### 3.5.1. Estimation at Current Level (All India) for Outdoor Banquets

##### 3.5.1.1. Estimated Number of Outdoor Banquets

The all India estimated total Banquet Halls units are obtained by the following methodology:

Estimated total banquets in the state/ UT =  $\{(\sum \text{actual total banquets in representative locations}) / (\sum \text{Total banquets as per Economic Census 2015 in representative locations})\} \times \text{Number of banquets as per Economic Census 2015 in the state/ UT}$

For example,

Total number of banquets in Raipur as per Economic Census 2015 = a

Actual total number of banquets after physical scanning & including trade directory & Economic Census 2015 = b

Total number of banquets in Chhattisgarh as per Economic Census 2015 = A

Then,

Estimated Total number of banquets in Chhattisgarh =  $(b/a) \times A$

**Table 3. 48 The all India Estimated Total banquets**

State	Physical Scanning – Banquets	Economic Census 2015 - Banquets in Selected Locations for Study	Economic Census 2015 - State Total Banquets	Estimated Total Banquets At Present in All India
Andaman and Nicobar#	2		0	2
Andhra Pradesh	96	3	80	2560
Arunachal Pradesh#	0		0	0
Assam#	55		0	55
Bihar #	166		2	166
Chandigarh#	14		0	14



State	Physical Scanning – Banquets	Economic Census 2015 - Banquets in Selected Locations for Study	Economic Census 2015 - State Total Banquets	Estimated Total Banquets At Present in All India
Chhattisgarh	28	1	1	28
Dadra Nagar Haveli*			0	
Daman and Diu #	5		0	5
Delhi	51	21	21	51
Goa	80	7	7	80
Gujarat	65	1	4	260
Haryana	72	1	8	576
Himachal Pradesh#	11		0	11
Jammu and Kashmir	9	2	2	9
Jharkhand #	95		0	95
Karnataka	132	1	3	396
Kerala	37	3	10	123
Lakshadweep*				
Madhya Pradesh	136	2	7	476
Maharashtra	156	23	40	271
Manipur#	8		0	8
Meghalaya#	5		0	5
Mizoram*			0	
Nagaland#	4		0	4
Odisha#	87		0	87
Puducherry	85	5	5	85
Punjab	25	2	27	338
Rajasthan	72	2	7	252
Sikkim#	14		0	14
Tamil Nadu	124	3	9	372
Telangana	143	29	3	15

State	Physical Scanning – Banquets	Economic Census 2015 - Banquets in Selected Locations for Study	Economic Census 2015 - State Total Banquets	Estimated Total Banquets At Present in All India
Tripura#	22		0	<b>22</b>
Uttar Pradesh	307	8	28	<b>1075</b>
Uttarakhand	92	5	10	<b>184</b>
West Bengal	167	2	2	<b>167</b>
<b>Total</b>	<b>2365</b>	<b>121</b>	<b>276</b>	<b>7805</b>

\* Data on the number of banquets present from the Economic Census of 2015 for the states of Mizoram, Dadra Nagar Haveli and Lakshadweep (by Ministry of Tourism, Government of India) has been directly used.

#Data was not available on the number of banquets present from the Economic Census of 2015 for the states of Andaman and Nicobar, Arunachal Pradesh, Assam, Bihar, Chandigarh, Daman and Diu, Himachal Pradesh, Jharkhand, Manipur, Meghalaya, Nagaland, Odisha, Tripura and Sikkim. Thus the data from Physical Scanning has been directly used for Estimating total banquets for All India.

### 3.5.1.2. Estimated Manpower Employed in Banquets

The estimated manpower employed at present in outdoor banquets is calculated using the ratios obtained in the sample study in 66 locations. The estimated manpower in India in outdoor banquet segment is presented in the following table.

**Table 3. 49 Estimated manpower in India for Outdoor Banquet at present**

Banquet Units in Sample	Tourists Visited in Sample	Manpower in sample	No. of banquet units in All India	Tourists Visited in All India	Estimated manpower hired (in nos.) All India
189	16109	1547	7805	665242	63885

Using the ratio of total number of banquets for all India to the total number of banquets for 66 locations under study at present, the corresponding total manpower hired for each designation of banquets and the total manpower hired over all designations for all India at the present level has been achieved.

**Table 3. 50 Estimated annual manpower hired in Banquet Halls by Designation**

Designation	Estimated Total Manpower @ Present - 2018
Manager (Owner, etc.)	9126
Guest Relations Executive	1806
Assistant	6345
Worker (Sweeper, Cleaner...etc.)	31186
Supervisor	3904
Receptionist	2538
Caterer and Chefs	6833
Security	2147
<b>Total</b>	<b>63885</b>

The total manpower employed for all outdoor banquets for all India at the current level is 63,885.

### 3.5.1.3. Estimated Annual Attrition in Banquets

Using the ratio of total number of banquets establishments for all India to the total number of banquets for 66 locations under study at present, the corresponding total attrition (including retirement) for each designation of banquets and the total attrition over all designation for all India at the present level has been achieved. The estimated annual attrition in different designations has been elucidated in the Table below:-

**Table 3. 51** Estimated annual attrition in Banquet Halls

Designation	Estimated Total Attrition @ Present - 2018
Manager (Owner, etc.)	950
Guest Relations Executive	0
Assistant	785
Worker (Sweeper, Cleaner...etc.)	1817
Supervisor	0
Receptionist	454
Caterer and Chefs	454
Security	0
<b>Total</b>	<b>4460</b>

The total attrition (including retirement) over all banquets for all India at the current level is 4460.

### 3.5.2. Estimation at Future Level (All India) for Outdoor Banquets

#### 3.5.2.1. Estimated Manpower in Future at Outdoor Banquets

The estimation of manpower employed in banquets in India at future levels is calculated using the assumption that the rate of growth of domestic and foreign tourists for the states/ UTs of India reflects the growth of their domestic and foreign clientele and hence the growth rate of domestic and foreign tourists to India is used to estimate the growth of clientele. The growth rates used for the calculation are presented below.

**Table 3. 52** Domestic and Foreign Tourist Growth Rate in India

State/UT	Domestic & Foreign Tourist Growth Rate
Andhra Pradesh	21%
Bihar	13%
Chandigarh	10%
Chhattisgarh	-21%
Delhi	8%

State/UT	Domestic & Foreign Tourist Growth Rate
Goa	24%
Gujarat	16%
Haryana	-24%
Himachal Pradesh	6%
Jammu & Kashmir	15%
Jharkhand	0%
Karnataka	15%
Kerala	8%
Madhya Pradesh	7%
Maharashtra	8%
Orissa	9%
Puducherry	9%
Punjab	19%
Rajasthan	11%
Tamil Nadu	2%
Telangana	6%
Uttar Pradesh	9%
Uttarakhand	16%
West Bengal	17%

Using the above growth rates the estimated growth in clientele is calculated for the year 2022 and 2025. The estimated clients of banquets in India for 2022 and 2025 are presented in the following table.

**Table 3. 53 Estimated Clientele in Outdoor Banquets from 2018 to 2025**

State	Estimated Clientele in 2018	Estimated Clientele in 2019	Estimated Clientele in 2020	Estimated Clientele in 2021	Estimated Clientele in 2022	Estimated Clientele in 2023	Estimated Clientele in 2024	Estimated Clientele in 2025
Andhra Pradesh	10159	12299	14891	18029	21827	26426	31994	38736
Bihar	2065	2328	2625	2959	3336	3761	4241	4781
Chandigarh	4543	5005	5514	6076	6694	7376	8127	8954
Chhattisgarh	58641	46531	36922	29298	23247	18447	14637	11615
Delhi	180134	195429	212022	230024	249555	270744	293732	318672
Goa	60540	75070	93086	115427	143129	177479	220074	272891
Gujarat	30601	35539	41274	47935	55671	64655	75089	87207
Haryana	2478	1894	1447	1106	845	646	494	377
Himachal Pradesh	4130	4390	4667	4962	5275	5608	5961	6338

State	Estimated Clientele in 2018	Estimated Clientele in 2019	Estimated Clientele in 2020	Estimated Clientele in 2021	Estimated Clientele in 2022	Estimated Clientele in 2023	Estimated Clientele in 2024	Estimated Clientele in 2025
Jammu & Kashmir	12389	14191	16255	18619	21328	24430	27983	32053
Jharkhand	826	828	831	834	836	839	841	844
Karnataka	9416	10822	12440	14298	16435	18891	21714	24958
Kerala	330	356	383	413	445	479	516	555
Madhya Pradesh	16519	17681	18925	20257	21682	23207	24840	26588
Maharashtra	166011	179373	193810	209409	226264	244475	264152	285413
Orissa	413	451	492	536	585	639	697	761
Puducherry	1321	1445	1581	1729	1891	2068	2262	2474
Punjab	12719	15145	18032	21471	25564	30439	36243	43154
Rajasthan	1321	1469	1633	1815	2018	2243	2493	2771
Tamil Nadu	4625	4706	4788	4872	4957	5043	5131	5221
Telangana	18583	19637	20751	21928	23172	24486	25875	27342
Uttar Pradesh	3304	3586	3893	4225	4586	4978	5404	5865
Uttarakhand	63349	73490	85256	98905	114739	133108	154417	179139
West Bengal	826	968	1136	1332	1561	1831	2147	2517
Assam								
Daman Diu								
Manipur								
Meghalaya								
Nagaland								
Sikkim								
Tripura								
Andaman & Nicobar								
Arunachal Pradesh								
*Dadra Nagar Haveli	-	-	-	-	-	-	-	-
*Lakshadweep	-	-	-	-	-	-	-	-
*Mizoram	-	-	-	-	-	-	-	-
<b>Grand Total</b>	<b>665242</b>	<b>722634</b>	<b>792654</b>	<b>876457</b>	<b>975642</b>	<b>1092298</b>	<b>1229065</b>	<b>1389227</b>

\* Please note that the state/ UT coloured pink are the one which do not fall in the mandated coverage area of the study and hence estimates for the same states/ UTs have not been drawn hereon.

The estimated manpower expected to be employed in banquets in India at 2022 and 2025 is calculated with the assumption that the rate of manpower employed per client

attended to by the banquets at present (obtained from sample study) will remain the same till the year 2025. Hence the estimated manpower expected to be employed in 2022 and 2025 in banquets in India is presented in the following table.

**Table 3. 54 Estimated Manpower in Outdoor Banquets for 2022 and 2025**

State	Estimated Tourist Visited - All India - 2022	Estimated Total Manpower All India - 2022	Estimated Tourist visited All India - 2025	Estimated Total Manpower All India - 2025
Andhra Pradesh	21827	4791	38736	8503
Bihar	3336	6539	4781	9371
Chandigarh	6694	609	8954	814
Chhattisgarh	23247	377	11615	188
Delhi	249555	2403	318672	3068
Goa	143129	1269	272891	2420
Gujarat	55671	3681	87207	5767
Haryana	845	789	377	352
Himachal Pradesh	5275	580	6338	697
Jammu & Kashmir	21328	213	32053	321
Jharkhand	836	2467	844	2490
Karnataka	16435	2163	24958	3284
Kerala	445	945	555	1180
Madhya Pradesh	21682	13660	26588	16751
Maharashtra	226264	4672	285413	5893
Orissa	585	3454	761	4487
Puducherry	1891	6559	2474	8582
Punjab	25564	996	43154	1681
Rajasthan	2018	1009	2771	1386
Tamil Nadu	4957	2877	5221	3030
Telangana	23172	8960	27342	10572
Uttar Pradesh	4586	8771	5865	11218
Uttarakhand	114739	3291	179139	5138
West Bengal	1561	8821	2517	14222
<b>Grand Total</b>	<b>975642</b>	<b>89894</b>	<b>1389227</b>	<b>121413</b>

The manpower expected to be employed by banquets in India at 2022 and 2025 by designation is presented in the following table. The ratio of manpower employed at present by designation that was obtained in the sample study findings has been utilized here to arrive at the following table.

**Table 3. 55 Estimated Manpower per designation in Outdoor Banquets for 2022 and 2025**

Designation	Estimated Total Manpower @ 2022	Estimated Total Manpower @ 2025
Manager (Owner, etc.)	12842	17345
Guest Relations Executive	2541	3432
Assistant	8928	12058
Worker (Sweeper, Cleaner...etc.)	43883	59269
Supervisor	5494	7420
Receptionist	3571	4823
Caterer and Chefs	9614	12985
Security	3022	4081
<b>Total</b>	<b>89894</b>	<b>121413</b>

The attrition (including retirement) of manpower in banquet segment in India is estimated using the attrition (including retirement) ratios obtained from the sample study findings and is presented for 2022 and 2025 below.

**Table 3. 56 Estimated total attrition (including retirement) for Outdoor Banquets at 2022 and 2025**

Designation	Estimated Total Attrition @ 2022	Estimated Total Attrition @ 2025
Manager (Owner, etc.)	1336	1805
Guest Relations Executive	0	0
Assistant	1104	1491
Worker (Sweeper, Cleaner...etc.)	2557	3453
Supervisor	0	0
Receptionist	639	863
Caterer and Chefs	639	863
Security	0	0
<b>Total</b>	<b>6276</b>	<b>8476</b>



Section 4

# All India Estimates For Hospitality and Tourism Institutes

This section estimates the estimated total number of hospitality and Tourism Institutes in India, estimated total no. Of seats/capacity in Hospitality and training institutes at present (2018) and in future (2022 and 2025)



## 4 All India Estimates for Hospitality & Tourism Institutes

### 4.1 Estimation of Hospitality & Tourism Institutes in India

There are approximately 753 institutes of imparting degrees, diplomas, certificates, etc. in Hotel Management, Hospitality and Tourism studies. Out of these, there are 70 Central, State and Private managed Institute of Hotel Management (IHM) colleges in India. There is also a Public Sector Unit (PSU) managed Institute of Hotel Management.

There are 14 Food Craft Institutes (FCI), 7 Indian Institute of Tourism & Travel Management (IITTM) and 2 AICTE approved courses in hospitality sector in Foreign University arm in India.

The rest, that is, approximately 659 private hotel management institutes are present in India.

### 4.2 Estimation of Seats/ Capacity in Hospitality & Tourism Institutes in India at Present - 2018

The total seats/ capacity of the 70 Central, State and Private managed Institute of Hotel Management (IHM) colleges and 1 PSU IHM in India, including seats of all categories of courses, is approximately 8,220.

The total seats in the 14 Food Craft Institutes (FCI), 7 Indian Institute of Tourism & Travel Management (IITTM) and 2 AICTE approved courses in hospitality sector in Foreign University arm in India, including all seats in all courses, is approximately 5,951 but annual manpower supply capacity is of 10,451 (this is taking into account the factor that there are diploma and certificate courses where course duration is less than a year and hence multiple batches pass out in a year).

For the rest, approximately 659 private hotel management institutes have approximately 55,900 seats and supply capacity of 72670 annually (this is taking into account the factor that there are diploma and certificate courses where course duration is less than a year and hence multiple batches pass out in a year).

Hence the total annual manpower supply capacity at present is approximately 91,245. Total enrolment/ admission that happened in 2018 were approximately 72,996 for the 91,245 seats/ capacity available. Out of the 72,996 admitted or enrolled, 7117 students dropped out or failed the courses (attrition). Hence effective supply (admission/

enrolment minus attrition) in the year 2018, rather at present (current supply) is approximately 65,879 students per year.

**Hence the estimated supply of manpower at current levels (for the year 2018) is 65,879.**

#### **4.3 Estimation of Seats/ Capacity in Hospitality & Tourism Institutes in India at 2022**

There have been no concrete plans of seat / capacity building within the year 2022 mentioned by the 100 institutes covered during primary survey and hence the estimated total annual manpower supply capacity is taken as the estimated present seat capacity , that is approximately 91,245. Taking into account the attrition (dropouts/ failed) of students at present being approximately 7117, the estimated total annual supply of manpower in the year 2022 is calculated as 84,128 (total capacity minus attrition).

**Hence the estimated supply of manpower at the year 2022 is 84,128.**

#### **4.4 Estimation of Seats/ Capacity in Hospitality & Tourism Institutes in India at 2025**

During the primary survey of 100 hospitality institutes, the surveyed IHMs mentioned that in total around 24,043 seats are planned to be increased in the next 4 years and expect this addition of seats to be fully in place by 2025. The surveyed private hospitality institutes too mentioned an increase in seats in the next 4 years. Proportionately applying the increase of seats to the entire 659 private institutes, the approximate increase in seats by the year 2025 is estimated to be 19,770. Hence the estimated total increase in seats by the year 2025 is approximately 43,813.

As the base, the estimated present seat capacity that is approximately 91,245 is taken as estimated total annual manpower supply capacity. Taking into account the attrition (dropouts/ failed) of students at present being approximately 7117 and the addition of 43,813 seats by the year 2025, the estimated total annual supply of manpower in the year 2025 is calculated as 1,27,941 (total capacity minus attrition).

**Hence the estimated supply of manpower at the year 2025 is 1,27,941.**

Section 5

# All India Estimated Manpower Requirement & Gap – Current & Future Levels

This section estimates the estimated total gap in manpower between different categories of Hospitality Establishments and Hospitality Institutes and gap in trained manpower at present level, at 2022 and at 2025.



## 5 All India Estimated Manpower Requirement & Gap - Current & Future Levels

The all India estimates of manpower and the estimated manpower gaps are presented in the following pages.

### 5.1 Estimated Manpower Requirement in India at Present (2018)

The estimated manpower employed at present in India, the estimated attrition (including retirement) and the total manpower requirement/ demand at present, that is manpower employed plus attrition, is presented in the following table.

**Table 5. 1 Estimated Manpower Employed, Attrition and Requirement by Category of Establishment at present level**

Category of Hospitality Establishment	Estimated Manpower Employed @ present	Estimated Attrition (including Retirement) @ present	Estimated Manpower Requirement (including Attrition) @ present
Accommodation	2291431	118645	2410076
Restaurants	1655722	112480	1768202
Tour and Travel Operator	125503	15771	141274
Spa and Wellness Units	63893	5543	69436
Banquets	63885	4460	68345
Highways-Dhabas	3608121		3608121
<b>Total</b>	<b>7808555</b>	<b>256898</b>	<b>8065453</b>

The estimated manpower employed at present, taking in to account their level of training, is presented in the table below.

**Table 5. 2 Estimated manpower employed at present considering different level of training**

Category Of Hospitality Establishment	Estimated Manpower Employed @ present			
	Formally Trained	On the Job Trained	Untrained	Total
Accommodation	1211907	586201	493324	2291431
Restaurants	643361	720768	291593	1655722
Tour and Travel Operators	62095	16020	47388	125503
Spa and Wellness Units	35284	7748	20861	63893
Banquet Halls	8638	0	55247	63885
Highways- Dhabas	0	721624	2886497	3608121
<b>Total</b>	<b>1961285</b>	<b>2052360</b>	<b>3794909</b>	<b>7808555</b>

The estimated manpower attrition (including retirement) at present, taking in to account their level of training, is presented in the table below.

**Table 5. 3 Estimated Attrition (including retirement) at present considering different level of training**

Category Of Hospitality Establishment	Estimated Attrition (including Retirement) @ present			
	Formally Trained	On the Job Trained	Untrained	Total
Accommodation	21672	50829	46143	118645
Restaurants	50908	47161	14411	112480
Tour and Travel Operators	4760	9424	1587	15771
Spa and Wellness Units	4828	0	715	5543
Banquet Halls	454	0	4006	4460
<b>Total</b>	<b>82623</b>	<b>107414</b>	<b>66862</b>	<b>256898</b>

The estimated total manpower demand/ requirement (adding attrition to the employed) at present, taking in to account their level of training, is presented in the table below.

**Table 5. 4 Estimated Manpower (including attrition) at present considering different level of training**

Category Of Hospitality Establishment	Estimated Manpower Requirement (including Attrition) @ present			
	Formally Trained	On the Job Trained	Untrained	Total
Accommodation	1233579	637030	539467	2410076
Restaurants	694269	767928	306004	1768202
Tour and Travel Operators	66855	25443	48975	141274
Spa and Wellness Units	40112	7748	21576	69436
Banquet Halls	9093	0	59252	68345
Highways- Dhabas	0	721624	2886497	3608121
<b>Total</b>	<b>2043908</b>	<b>2159774</b>	<b>3861771</b>	<b>8065453</b>

Hence the estimated manpower demand at current level is in total 80,65,453 while the estimated demand for formally trained manpower at current level is 20,43,908.

## 5.2 Estimated Manpower Requirement in India at 2022

The estimated manpower employed for future level of year 2022, the estimated attrition (including retirement) and the total manpower requirement/ demand at 2022, that is manpower employed plus attrition, is presented in the following table.

**Table 5. 5 Estimated Manpower Employed, Attrition and Requirement by Category of Establishment at 2022**

Estimated Manpower in India – 2022			
Category of Hospitality Establishment	Estimated Manpower Employed @ 2022	Estimated Attrition (including Retirement @ 2022)	Estimated Manpower Requirement (including Attrition) @ 2022
Accommodation	3399842	176036	3575878
Restaurants	1774497	120549	1895046
Tour and Travel Operator	180436	22674	203110
Spa and Wellness Units	85155	7388	92543
Banquet Halls	89894	6276	96170
Highways-Dhabas	4014914		4014914
<b>Total</b>	<b>9544738</b>	<b>332921</b>	<b>9877659</b>

The estimated manpower employed at 2022, taking in to account their level of training, is presented in the table below.

**Table 5. 6 Estimated manpower employed at 2022 considering different level of training**

Category Of Hospitality Establishment	Estimated Manpower Employed @ 2022			
	Formally Trained	On the Job Trained	Untrained	Total
Accommodation	1798130	869758	731954	3399842
Restaurants	689513	772473	312511	1774497
Tour and Travel Operators	89274	23031	68130	180436
Spa and Wellness Units	47026	10327	27802	85155
Banquet Halls	12155	0	77739	89894
Highways- Dhabas	0	802983	3211931	4014914
<b>Total</b>	<b>2636099</b>	<b>2478571</b>	<b>4430068</b>	<b>9544738</b>

The estimated manpower attrition (including retirement) at 2022, taking in to account their level of training, is presented in the table below.

**Table 5. 7 Estimated Attrition (including retirement) at 2022 considering different level of training**

Category Of Hospitality Establishment	Estimated Attrition (including Retirement) @ 2022			
	Formally Trained	On the Job Trained	Untrained	Total
Accommodation	32155	75417	68464	176036
Restaurants	54560	50544	15445	120549
Tour and Travel Operators	6844	13549	2281	22674
Spa and Wellness Units	6434	0	953	7388
Banquet Halls	639	0	5637	6276
<b>Total</b>	<b>100633</b>	<b>139509</b>	<b>92779</b>	<b>332921</b>

The estimated total manpower demand/ requirement (adding attrition to the employed) at 2022, taking in to account their level of training, is presented in the table below.

**Table 5. 8 Estimated Manpower (including attrition) at 2022 considering different level of training**

Category Of Hospitality Establishment	Estimated Manpower Requirement (including Attrition) @ 2022			
	Formally Trained	On the Job Trained	Untrained	Total
Accommodation	1830286	945174	800418	3575878
Restaurants	744074	823017	327956	1895046
Tour and Travel Operators	96118	36580	70412	203110
Spa and Wellness Units	53460	10327	28756	92543
Banquet Halls	12794	0	83375	96170
Highways- Dhabas	0	802983	3211931	4014914
<b>Total</b>	<b>2736732</b>	<b>2618080</b>	<b>4522847</b>	<b>9877659</b>

Hence the estimated manpower demand at current level is in total 98,77,659 while the estimated demand for formally trained manpower at current level is 27,36,732.



### 5.3 Estimated Manpower Requirement in India at 2025

The estimated manpower employed for future level of year 2025, the estimated attrition (including retirement) and the total manpower requirement/ demand at 2025, that is manpower employed plus attrition, is presented in the following table.

**Table 5. 9 Estimated Manpower Employed, Attrition and Requirement by Category of Establishment at 2025**

Estimated Manpower in India – 2025			
Category of Hospitality Establishment	Estimated Manpower Employed @ 2025	Estimated Attrition (including Retirement @ 2025)	Estimated Manpower Requirement (including Attrition) @ 2025
Accommodation	4819890	249562	5069452
Restaurants	1869906	127030	1996936
Tour and Travel Operator	255690	32130	287820
Spa and Wellness Units	110011	9544	119555
Banquet Halls	121413	8476	129889
Highways-Dhabas	4394107		4394107
<b>Total</b>	<b>11571017</b>	<b>426742</b>	<b>11997759</b>

The estimated manpower employed at 2025, taking in to account their level of training, is presented in the table below.

**Table 5. 10 Estimated manpower employed at 2025 considering different level of training**

Category Of Hospitality Establishment	Estimated Manpower Employed @ 2025			
	Formally Trained	On the Job Trained	Untrained	Total
Accommodation	2549174	1233038	1037677	4819890
Restaurants	726586	814006	329314	1869906
Tour and Travel Operators	126508	32637	96545	255690
Spa and Wellness Units	60752	13341	35918	110011
Banquet Halls	16417	0	104996	121413
Highways- Dhabas	0	878821	3515286	4394107
<b>Total</b>	<b>3479438</b>	<b>2971844</b>	<b>5119735</b>	<b>11571017</b>

The estimated manpower attrition (including retirement) at 2025, taking in to account their level of training, is presented in the table below.

**Table 5. 11 Estimated Attrition (including retirement) at 2025 considering different level of training**

Category Of Hospitality Establishment	Estimated Attrition (including Retirement) @ 2025			
	Formally Trained	On the Job Trained	Untrained	Total
Accommodation	45586	106917	97059	249562
Restaurants	57494	53261	16275	127030
Tour and Travel Operators	9698	19199	3233	32130
Spa and Wellness Units	8312	0	1231	9544
Banquet Halls	863	0	7613	8476
<b>Total</b>	<b>121954</b>	<b>179377</b>	<b>125412</b>	<b>426742</b>

The estimated total manpower demand/ requirement (adding attrition to the employed) at 2025, taking in to account their level of training, is presented in the table below.

**Table 5. 12 Estimated Manpower (including attrition) at 2025 considering different level of training**

Category Of Hospitality Establishment	Estimated Manpower Requirement (including Attrition) @ 2025			
	Formally Trained	On the Job Trained	Untrained	Total
Accommodation	2594760	1339955	1134737	5069452
Restaurants	784080	867268	345589	1996936
Tour and Travel Operators	136206	51836	99778	287820
Spa and Wellness Units	69065	13341	37149	119555
Banquet Halls	17281	0	112609	129889
Highways- Dhabas	0	878821	3515286	4394107
<b>Total</b>	<b>3601391</b>	<b>3151221</b>	<b>5245147</b>	<b>11997759</b>

Hence the estimated manpower demand at current level is in total 1,19,97,759 while the estimated demand for formally trained manpower at current level is 36,01,391.

## 5.4 Estimated Manpower in India at Present (2018)

The manpower gap at current levels (at present - 2018) combining manpower demands from the accommodation, restaurant, Tour operator/ travel agent, spa/ wellness, outdoor banquet and highway dhabas is presented in the table below.

**Table 5. 13 Estimated Manpower Gap considering all categories of Hospitality Establishments at present level**

Category	At Present Level
Accommodation	2410076
Restaurants	1768202
Tour Operators	141274
Spa and Wellness	69436
Banquets	68345
Highways-Dhaba	3608121
<b>Estimated manpower in Hospitality Establishments</b>	<b>8065453</b>
<b>Estimated trained manpower from Hospitality and Tourism Institutes</b>	<b>65879</b>

The manpower gap at current levels (at present - 2018) combining manpower demands from the accommodation, restaurant and Tour operator/ travel agent is presented in the table below.

**Table 5. 14 Estimated manpower gap considering Hotels, Restaurants and Tour Operators at present level**

Category	At Present Level
Accommodation	2410076
Restaurants	1768202
Tour Operators	141274
<b>Estimated manpower in Hospitality Establishments (Hotels, Restaurants and Tour Operators)</b>	<b>4319551</b>
<b>Estimated trained manpower from Hospitality and Tourism Institutes</b>	<b>65879</b>

The manpower gap at current levels (at present - 2018) combining manpower demands from the accommodation and restaurant is presented in the table below.

**Table 5. 15 Estimated manpower gap considering Hotels and Restaurants at present level**

Category	At Present Level
Accommodation	2410076
Restaurants	1768202
<b>Estimated manpower demand in Hospitality Establishments (Hotels, Restaurants )</b>	<b>4178278</b>
<b>Estimated trained manpower from Hospitality and Tourism Institutes</b>	<b>65879</b>

It is essential to note that the sample study has pointed out that the supply from hospitality and tourism institutes are mainly getting inducted in as formally trained manpower in the hospitality establishments. Hence it is essential to calculate the gap in formally trained manpower demand at hospitality establishments and the supply from hospitality institutes.

The formally trained manpower gap at current levels (at present - 2018) combining manpower demands from the accommodation, restaurant, Tour operator/ travel agent, spa/ wellness, outdoor banquet and highway dhabas is presented in the table below.

**Table 5. 16 Estimated Manpower gap between formally trained employees in all categories of establishments and trained manpower from Hospitality Institute at present level**

Category - Formally Trained	At Present Level
Accommodation	1233579
Restaurants	694269
Tour Operators	66855
Spa and Wellness	40112
Banquets	9093
Highways-Dhabas	0
<b>Estimated formally trained manpower in Hospitality Establishments</b>	<b>2043908</b>

The formally trained manpower gap at current levels (at present - 2018) combining manpower demands from the accommodation, restaurant and tour operator/ travel agent is presented in the table below.

**Table 5. 17 Estimated Manpower gap between formally trained employees in Hotels, Restaurants and Tour Operators and trained manpower from Hospitality Institute at present level**

Category - Formally Trained	At Present Level
Accommodation	1233579
Restaurant	694269
Tour Operator	66855
<b>Estimated formally trained manpower in Hospitality Establishments for Hotels, Restaurants and Tour Operators</b>	<b>1994704</b>

Since the study pointed out that manpower supply from the hospitality institutes gets inducted in to the accommodation and restaurant category of hospitality establishments, it is essential to calculate the gap in formally trained manpower demand at accommodation and restaurant units with the supply from hospitality institutes. The formally trained manpower gap at current levels (at present - 2018) combining manpower demands from the accommodation and restaurant is presented in the table below.

**Table 5. 18 Estimated Manpower gap between formally trained employees in Hotels and Restaurants and trained manpower from Hospitality Institute at present level**

Category - Formally Trained	At Present Level
Accommodation	1233579
Restaurant	694269
<b>Estimated formally trained manpower in Hospitality Establishments for Hotels and Restaurants</b>	<b>1927848</b>

The sample study has pointed out that majority - almost 75% of the manpower supply from the hospitality institutes gets inducted in to the classified category accommodation units. Hence it is essential to calculate the gap in formally trained manpower demand at accommodation units and the supply from hospitality institutes. The formally trained manpower gap at current levels (at present - 2018) for the accommodation segment only is presented in the table below.

**Table 5. 19 Estimated Manpower gap between formally trained employees in Hotels and trained manpower from Hospitality Institute at present level**

Category - Formally Trained	At Present Level
<b>Estimated formally trained manpower in Hospitality Establishments for Hotels</b>	<b>1233579</b>

## 5.5 Estimated Manpower Gap in India at 2022

The manpower gap at future levels (at 2022) combining manpower demands from the accommodation, restaurant, Tour operator/ travel agent, spa/ wellness, outdoor banquet and highway dhabas is presented in the table below.

**Table 5. 20 Estimated Manpower Gap considering all categories of Hospitality Establishments at 2022**

Category	At 2022
Accommodation	1165802
Restaurants	126844
Tour Operators	61836
Spa and Wellness	23107
Banquets	27825
Highways-Dhabas	406793
<b>Estimated manpower demand (Demand at Future year minus demand at 2018) in Hospitality Establishments</b>	<b>1812206</b>
<b>Estimated trained manpower from Hospitality and Tourism Institutes</b>	<b>84128</b>
<b>Estimated Manpower Gap</b>	<b>1728078</b>

It is essential to note that the sample study has pointed out that the supply from hospitality and tourism institutes are mainly getting inducted in as formally trained manpower in the hospitality establishments. Hence it is essential to calculate the gap in formally trained manpower demand at hospitality establishments and the supply from hospitality institutes.

The formally trained manpower gap at future levels (at 2022) combining manpower demands from the accommodation, restaurant, Tour operator/ travel agent, spa/ wellness, outdoor banquet and highway dhabas is presented in the table below.

**Table 5. 21 Estimated Manpower gap between formally trained employees in all categories of establishments and trained manpower from Hospitality Institute at 2022**

Category - Formally Trained	At 2022
Accommodation	596707
Restaurants	49804
Tour Operators	29263
Spa and Wellness	13348
Banquets	3702
Highways-Dhabas	0
<b>Estimated formally trained manpower demand (Demand at Future year minus demand at 2018) in Hospitality Establishments</b>	<b>692824</b>
<b>Estimated trained manpower from Hospitality and Tourism Institutes</b>	<b>84128</b>
<b>Estimated Manpower Gap</b>	<b>608696</b>

The formally trained manpower gap at future levels (at 2022) combining manpower demands from the accommodation, restaurant and tour operator/ travel agent is presented in the table below.

**Table 5. 22 Estimated Manpower gap between formally trained employees in Hotels, Restaurants and Tour Operators and trained manpower from Hospitality Institute at 2022**

Category - Formally Trained	At 2022
Accommodation	596707
Restaurant	49804
Tour Operator	29263
<b>Estimated formally trained manpower demand (Demand at Future year minus demand at 2018) in Hospitality Establishments for Hotels, Restaurants and Tour Operators</b>	<b>675774</b>
<b>Estimated trained manpower from Hospitality and Tourism Institutes</b>	<b>84128</b>
<b>Estimated Manpower Gap</b>	<b>591646</b>

Since the study pointed out that manpower supply from the hospitality institutes gets inducted in to the accommodation and restaurant category of hospitality establishments, it is essential to calculate the gap in formally trained manpower demand at accommodation and restaurant units with the supply from hospitality institutes. The formally trained manpower gap at future levels (at 2022) combining manpower demands from the accommodation and restaurant is presented in the table below.

**Table 5. 23 Estimated Manpower gap between formally trained employees in Hotels and Restaurants and trained manpower from Hospitality Institute at 2022**

Category - Formally Trained	At 2022
Accommodation	596707
Restaurant	49804
<b>Estimated formally trained manpower demand (Demand at Future year minus demand at 2018) in Hospitality Establishments for Hotels and Restaurants</b>	<b>646511</b>
<b>Estimated trained manpower from Hospitality and Tourism Institutes</b>	<b>84128</b>
<b>Estimated Manpower Gap</b>	<b>562383</b>

The sample study has pointed out that majority - almost 75% of the manpower supply from the hospitality institutes gets inducted in to the classified category accommodation units. Hence it is essential to calculate the gap in formally trained manpower demand at accommodation units and the supply from hospitality institutes. The formally trained manpower gap at future levels (at 2022) for the accommodation segment only is presented in the table below.

**Table 5. 24 Estimated Manpower gap between formally trained employees in Hotels and trained manpower from Hospitality Institute at 2022**

Category - Formally Trained	At 2022
Estimated formally trained manpower demand (Demand at Future year minus demand at 2018) in Hospitality Establishments for Hotels	596707
Estimated trained manpower from Hospitality and Tourism Institutes	84128
<b>Estimated Manpower Gap</b>	<b>512579</b>

## 5.6 Estimated Manpower Gap in India at 2025

The manpower gap at future levels (at 2025) combining manpower demands from the accommodation, restaurant, Tour operator/ travel agent, spa/ wellness, outdoor banquet and highway dhabas is presented in the table below.

**Table 5. 25 Estimated Manpower Gap considering all categories of Hospitality Establishments at 2025**

Category	At 2025
Accommodation	2659376
Restaurants	228734
Tour Operators	146546
Spa and Wellness	50119
Banquets	61544
Highways-Dhabas	785986
<b>Estimated manpower demand (Demand at Future year minus demand at 2018) in Hospitality Establishments</b>	<b>3932306</b>
<b>Estimated trained manpower from Hospitality and Tourism Institutes</b>	<b>127941</b>
<b>Estimated Manpower Gap</b>	<b>3804365</b>

The manpower gap at future levels (at 2025) combining manpower demands from the accommodation, restaurant and Tour operator/ travel agent is presented in the table below.

**Table 5. 26 Estimated manpower gap considering Hotels, Restaurants and Tour Operators at 2025**

Category	At 2025
Accommodation	2659376
Restaurants	228734
Tour Operators	146546



Category	At 2025
Estimated manpower demand (Demand at Future year minus demand at 2018) in Hospitality Establishments (Hotels, Restaurants and Tour Operators)	3034657
Estimated trained manpower from Hospitality and Tourism Institutes	127941
<b>Estimated Manpower Gap</b>	<b>2906716</b>

The manpower gap at future levels (at 2025) combining manpower demands from the accommodation and restaurant is presented in the table below.

**Table 5. 27 Estimated manpower gap considering Hotels and Restaurants at 2025**

Category	At 2025
Accommodation	2659376
Restaurants	228734
Estimated manpower demand (Demand at Future year minus demand at 2018) in Hospitality Establishments (Hotels, Restaurants )	2888111
Estimated trained manpower from Hospitality and Tourism Institutes	127941
<b>Estimated Manpower Gap</b>	<b>2760170</b>

It is essential to note that the sample study has pointed out that the supply from hospitality and tourism institutes are mainly getting inducted in as formally trained manpower in the hospitality establishments. Hence it is essential to calculate the gap in formally trained manpower demand at hospitality establishments and the supply from hospitality institutes.

The formally trained manpower gap at future levels (at 2025) combining manpower demands from the accommodation, restaurant, Tour operator/ travel agent, spa/ wellness, outdoor banquet and highway dhabas is presented in the table below.

**Table 5. 28 Estimated Manpower gap between formally trained employees in all categories of establishments and trained manpower from Hospitality Institute at 2025**

Category - Formally Trained	At 2025
Accommodation	1361182
Restaurants	89811
Tour Operators	69350
Spa and Wellness	28953
Banquets	8188
Highways-Dhabas	0
Estimated formally trained manpower demand (Demand at Future year minus demand at 2018) in Hospitality Establishments	1557483
Estimated trained manpower from Hospitality and Tourism Institutes	127941
<b>Estimated Manpower Gap</b>	<b>1429542</b>

The formally trained manpower gap at future levels (at 2025) combining manpower demands from the accommodation, restaurant and tour operator/ travel agent is presented in the table below.

**Table 5. 29 Estimated Manpower gap between formally trained employees in Hotels, Restaurants and Tour Operators and trained manpower from Hospitality Institute at 2025**

Category - Formally Trained	At 2025
Accommodation	1361182
Restaurant	89811
Tour Operator	69350
<b>Estimated formally trained manpower demand (Demand at Future year minus demand at 2018) in Hospitality Establishments for Hotels, Restaurants and Tour Operators</b>	<b>1520343</b>
<b>Estimated trained manpower from Hospitality and Tourism Institutes</b>	<b>127941</b>
<b>Estimated Manpower Gap</b>	<b>1392402</b>

Since the study pointed out that manpower supply from the hospitality institutes gets inducted in to the accommodation and restaurant category of hospitality establishments, it is essential to calculate the gap in formally trained manpower demand at accommodation and restaurant units with the supply from hospitality institutes. The formally trained manpower gap at future levels (at 2025) combining manpower demands from the accommodation and restaurant is presented in the table below.

**Table 5. 30 Estimated Manpower gap between formally trained employees in Hotels and Restaurants and trained manpower from Hospitality Institute at 2025**

Category - Formally Trained	At 2025
Accommodation	1361182
Restaurant	89811
<b>Estimated formally trained manpower demand (Demand at Future year minus demand at 2018) in Hospitality Establishments for Hotels and Restaurants</b>	<b>1450992</b>
<b>Estimated trained manpower from Hospitality and Tourism Institutes</b>	<b>127941</b>
<b>Estimated Manpower Gap</b>	<b>1323051</b>

The sample study has pointed out that majority - almost 75% of the manpower supply from the hospitality institutes gets inducted in to the classified category accommodation units. Hence it is essential to calculate the gap in formally trained manpower demand at accommodation units and the supply from hospitality institutes. The formally trained manpower gap at future levels (at 2025) for the accommodation segment only is presented in the table below.

**Table 5. 31 Estimated Manpower gap between formally trained employees in Hotels and trained manpower from Hospitality Institute at 2025**

Category - Formally Trained	At 2025
Estimated formally trained manpower demand (Demand at Future year minus demand at 2018) in Hospitality Establishments for Hotels	1361182
Estimated trained manpower from Hospitality and Tourism Institutes	127941
<b>Estimated Manpower Gap</b>	<b>1233241</b>

## 5.7 Estimated Untrained/ On the Job Trained Manpower in India at Current & Future Level

There is a large chunk of manpower employed in all segments/ categories of hospitality establishments which are trained on the job or are untrained and use basic skill to perform their responsibilities. The estimated manpower at current and future levels which are trained on the job or are untrained is provided in the table below.

**Table 5. 32 Manpower employed in Hospitality Establishments who are trained on the job or Untrained at present level, at 2022 and at 2025**

Training Category	At Present Level	At 2022	At 2025
On the Job	2159774	458306	991447
Untrained	3861771	661076	1383376
<b>Total</b>	<b>6021545</b>	<b>1119382</b>	<b>2374823</b>

Thus the Final Demand Supply gap in the Hospitality Industry till 2025 is as under.

S. No.	Segments	2018	2022	2025
a	Total Employment	78,08,555	95,44,738	1,15,71,017
b	Additional Annual Manpower Requirement (current year employment minus previous year employment)*	23,39,555	5,45,566	7,62,245
c	Estimated Annual Attrition	2,56,898	3,32,921	4,26,742
d	Annual Demand for Manpower (b+c)	25,96,453	8,78,487	11,88,987
e	Trainers required (36 students are trained by 1 teacher/ trainer - from Sample study)	72,124	24,402	33,027
f	<b>Total Annual Demand</b>	<b>26,68,577</b>	<b>9,02,890</b>	<b>12,22,015</b>
g	<b>Total Supply (including attrition)</b>	<b>65,879</b>	<b>84,128</b>	<b>1,27,941</b>
h	<b>Demand Supply Gap (f-g)</b>	<b>26,02,698</b>	<b>8,18,762</b>	<b>10,94,074</b>

\* For 2018, the data of total employment in 2016-17 at 54.69 lakhs, from Market Pulse Report on "Study to Assess the Requirement of Manpower in Hospitality and Travel Trade Sector is used.

## 5.8 Suggested Ways to Mitigate the Estimated Manpower Gap in India at Current & Future Level

To mitigate the huge gaps (both in current and future level) in formally trained manpower, it is required for the Ministry of Tourism, Government of India to introduce new courses which are short term but train the students with specific required skills. These courses should be segregated by the target placement establishment types and by the functional domains. For example, a course may be introduced which solely trains students for housekeeping responsibilities that are present in accommodation units. The Ministry of Tourism, Government of India may seek the help of leading luminaries in each and every hospitality establishment segment to design such short term but focused courses to plug the gap in the estimated formally trained manpower available and required by the establishments.

Another way to mitigate the manpower gap is to open more IHMs or increase the seats in the existing courses. The accreditation bodies may look into avenues of converting more unaccredited institutes ( at present there are many such present in India) to accreditation ones by suitably restructuring the courses/ curriculum, etc. so that more formally trained manpower is churned out each year.

At present many star categories and classified category of accommodation and restaurant units are training their new recruits in their own establishments to suit their specific requirements. The Government of India may look in to avenues which will skill students in similar manner. The Government of India may also look in to the prospects of incentivising hospitality establishments for skilling and inducting manpower to plug the estimated gaps in future and current level.

It is also reported by the hospitality establishments and institutes surveyed that the attrition rate being too high in the industry and there are many employee drop outs due to the demanding work schedules and responsibilities combined with relatively lower salary structure than the market estimates. The Government may look in to this so that the attrition level is lowered down.

For plugging the estimated overall manpower gap both in current and future level, which consists mostly the untrained and trained on the job manpower, the Ministry of Tourism, Government of India may look into extending and spreading programs like “Hunar se Rozgaar” so that this bulk untrained/ on the job trained manpower is skilled and trained suitably and inducted in to the “on the rolls” workforce in hospitality segment.

## ANNEXURES

Study on Employment Level and Skill Gap Analysis in Hospitality and Allied sector

## Questionnaire for Hotels, Wellness Units, Restaurants, Cafes

Introduction to The Nielsen Company India & this survey

Good -----! Sir/ Madam. My name is \_\_\_\_\_. I represent, Nielsen India, the world's leading Marketing Research agency. We regularly conduct surveys on various products and services. At present we are conducting a survey titled "Study on Employment Level and Skill Gap Analysis in hospitality and Allied sector" sponsored by Ministry of Tourism, Govt. of India. In this regard I would like to ask you a few questions to better understand your opinion towards the survey product. Your opinion is very important for this study. Our intention is to obtain information, which will be used for statistical analysis only. We guarantee the complete confidentiality of your responses. Thank you for your kind cooperation

Respondent Data:

A	Name of Establishment				
B	Name of the Respondent				
C	Full address of main establishment				
D	Contact no.				
E	E-mail				
F	Designation				
G	Establishment Type	Accommodation Units	1		
		Restaurants	2		
		Wellness Units	3		
		Medical Units	4		
I	Nature of Business -	Heritage/ Legacy	1	Unclassified Hotels	8

	Accommodation Units	5 Star/ 5 Star Deluxe	2	Home Stay	9
		4 Star	3	Youth Hostels	10
		1/2/3 Star	4	Cruise	11
		Guest Houses	5	Floating Accommodation	12
		Bed & Breakfast	6	Others –Dharamshala, Gurudwara etc	13
		Time Share Resort	7		
	Nature of Business - Hospital & Wellness Units	Multi-Specialty Hospital	1	Naturopathy Wellness Centers	5
		Super Specialty Hospital	2	Ayurveda Wellness Centers	6
		Nursing Home	3	Others	7
		Large Public Hospital	4		
	Nature of Business - Restaurants and Eatery Units	Classified restaurants (MOT, FHRAI, TIMES FOOD ..)	1	Standalone restaurants/ Sweet shop	3
		Fast food units	2	Motels & Restaurant on Highways	4
J	Restaurant Category	Multi Cuisine	1	Specialty	4
		Mughlai	2	Any Other (SPECIFY)	5
		South Indian	3		
K	Type of Ownership	Proprietary	1	Pvt. Ltd.	4
		Partnership	2	Public Ltd.	5
		Central Govt.	3	State Govt.	6
L	Banquet Facility	Yes	1	No	2
M	Liquor Facility	Yes	1	No	2
N	Seating Capacity (FOR				

	RESTAURANTS)				
O	Number of Restaurants in the HOTEL				

Please let us know in detail about your establishment

Year of Establishment		
Classification Profile		
Classification Authority		
Memberships to Associations/ Organizations		
Pls. familiarize us with the Departments in your organization (Pls. Tick)		
Revenue	Front Office	
	Sales Department	
	Food & Beverage	
Non Revenue	Housekeeping	
	Maintenance	
	Purchase	
	Human Resources	
	Accounts Department	
	Security Department	

a. Please let us know in detail about Seats (in nos.) in your establishment for last 1 year and what are the peak and lean seasons

For Accommodation Units		For Wellness Units/ Hospitals	
Number of domestic visitors attended to in 2018 (approximate)		Number of foreign visitors attended to in 2018 (approximate)	
Number of foreign visitors attended		For Restaurants	



to in 2018 (approximate)			
Peak Season Room Occupancy		Peak Season Seat Occupancy	
Lean Season Room Occupancy		Lean Season Seat Occupancy	

3 .b. Please mention the number of rooms/seats added in your hotel in the last 5 years

Details	2014	2015	2016	2017	2018
Rooms – For Accommodation Units					
Seats – For Restaurants					
Employees - On the roll					
Employees - Contractual/Third party					

3. c. As per your opinion does the shortage or excess of rooms leads to over-pricing /underpricing of the rooms – **ONLY FOR ACCOMODATION UNITS**

---

Please let us know the PRINTED tariff (in Rs./ Bed Night) – **ONLY FOR ACCOMODATION UNITS**

Room Type	Number of Rooms	Peak Season Tariff	Lean Season Tariff
Single Bed			
Double Bed			
Superior			
Deluxe/ Luxury			
Deluxe room with balcony			
Suite			
Executive			
Double Sharing			

Triple Sharing			
Family			
Dormitory/ Ward			
Other – 1 (specify)			
Other – 2 (specify)			
Other – 3 (specify)			

SECTION – C

About Manpower

Please let us know in detail about Total no. of employees in your establishment for last 1 year. Please let us know the average salary structure (in Lakhs/ annum) in different Designation and Departments and type of employees for last year 2018. FOR RESTAURANTS FILL UP FOR RELEVANT POSTS

Details	Number of Employees at Present			Average Yearly Salary Package	
	On the roll	Contractual/Third party	Total	On the roll	Contractual/Third party
A. F&B KITCHEN					
General Manager / Manager					
Executive Chef					
Sous chef					
Chef					
Line cook					
Assistant staff					
Others (dishwasher, etc.)					
B. F & B SERVICE					
Head					

Details	Number of Employees at Present			Average Yearly Salary Package	
	On the roll	Contractual/Third party	Total	On the roll	Contractual/Third party
Restaurant Managers					
Banquet Manager					
Bartender					
Waiter/ Server					
Room service					
Other (specify)					
<b>C. HOUSE KEEPING /FRONT OFFICE</b>					
Manager					
Executive/Supervisor					
Room Attendants					
Receptionists					
Sales					
Customer Service					
Bell Boys					
Security Mgr					
Transport Mgr					
Drivers					
Other (specify)					
<b>D. HR/ ADMINISTRATION/ ACCOUNTS/PURCHASE</b>					
HR Head/Manager					
HR Executive					

Details	Number of Employees at Present			Average Yearly Salary Package	
	On the roll	Contractual/Third party	Total	On the roll	Contractual/Third party
Admin Head/Executive					
Accounts/ Finance Head					
Purchase					
Other (specify)					
E. OTHER ANCILLARY					
Public Relations Executive					
Gardening					
Engineer					
Electrician					
Quality Control					
Plumber/ Waterworks					
Other – 1					
Other – 2					

What is the desired educational qualification and average years of experience for the following positions? **FOR RESTAURANTS FILL UP FOR RELEVANT POSTS**

Details	Educational Qualification (Refer Code)		Years of Experience (in Years)		Soft Skill (Read Code)	
	Desired	Actual	Desired	Actual	Desired	Actual
<b>A. F&amp;B KITCHEN</b>						
General Manager / Manager						
Executive Chef						
Sous chef/Chef						
Line cook						
Assistant staff						
Others (dishwasher, etc.)						
<b>B. F &amp; B SERVICE</b>						
Head / Manager						
Banquet Manager						
Bartender						
Waiter/ Server/Room Service						
<b>C. HOUSE KEEPING /FRONT OFFICE</b>						
Manager						
Executive / Supervisor/Attendants						
Receptionists						
Sales						
Customer Service						
Bell Boys						

Security Mgr						
Transport Mgr						
Drivers						
Other (specify)						
D. HR/ ADMINISTRATION/ ACCOUNTS/PURCHASE						
GM /Manager						
Executive/Assistant						
E. OTHER ANCILLARY						
Public Relations Executive						
Gardening						
Engineer/Stores						
Quality Control						
Plumber/ Waterworks						
Other - 1						
Other - 2						

Code

Educational Qualification	MBA/CA/CS/ICWA	1	Hotel Management & Catering Technology	7
	Degree Course in Travel & Tourism/ Hospitality Management	2	Graduate	8
	Degree Course in Culinary Arts	3	Post Graduate	9
	B.Sc Hotel Management	4	Class 10 pass out	10
	Diploma Course in Travel & Tourism/Hospitality	5	Class 12 pass out	11
	Health & Hospitality Management	6	Any Other ( Pls specify)	12
Soft Skills	Leadership	9	Proficiency	20
	Problem Solving	10	Stress Management	21
	Communication	11	Time Management	22
	Customer Service	12	Emotional Intelligence	23
	Flexibility	13	Team work	24
	Behavioural Skill	14	Interpersonal relationship	25
	Coherency	15	Innovation	26
	Conviction	16	Planning	27
	Appropriateness	17	Cultural awareness	28
	Grooming	18	Multi tasking	29
	Foreign language	19	Others ( Pls specify)	

What are the top 3 ways to mitigate the skill gap you face?

<u>1</u>	
<u>2</u>	
<u>3</u>	

Do you have tie up with Hospitality training institutes for intake? Name top 5 Institutes

<u>Sl</u>	<u>Name of the Institute</u>	<u>No. of students inducted in FY 17-18</u>
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What is your strategy w.r.t manpower to deal with peak and lean seasons?

<u>Peak Season</u>	<u>Lean Season</u>



Please let us know in detail about attrition / retirements/ recruitment (in Nos.) from your establishment for last 1 year – 2018. FOR RESTAURANTS FILL UP FOR RELEVANT POSTS. Reason for recruitment could be attrition/ retirement/ growth/ peak season

Details	On the roll				Contractual/Third party			
	Attrition	Retirement	Recruitment	Reason for Recruitment	Attrition	Retirement	Recruitment	Reason for Recruitment
A. F&B KITCHEN								
General Manager / Manager								
Executive Chef								
Sous chef								
Chef								
Line cook								
Assistant staff								
Others (dishwasher, etc.)								
B. F & B SERVICE								
General Manager								
Restaurant Managers								
Banquet Manager								
Bartender								
Waiter/ Server								
Room service								
Other (specify)								
C. HOUSE KEEPING /FRONT OFFICE								
Manager								

Details	On the roll				Contractual/Third party			
	Attrition	Retirement	Recruitment	Reason for Recruitment	Attrition	Retirement	Recruitment	Reason for Recruitment
Executive/Supervisor								
Room Attendants								
Receptionists								
Sales								
Customer Service								
Bell Boys								
Security Mgr								
Transport Mgr								
Drivers								
Other (specify)								
D. HR/ ADMINISTRATION/ ACCOUNTS/PURCHASE								
HR Head/Manager								
HR Executive								
Admin Head/Executive								
Accounts/ Finance Head								
Purchase								
Other (specify)								
E. OTHER ANCILLARY								
Public Relations Executive								
Gardening								
Engineer								

Details	On the roll				Contractual/Third party			
	Attrition	Retirement	Recruitment	Reason for Recruitment	Attrition	Retirement	Recruitment	Reason for Recruitment
Electrician								
Quality Control								
Plumber/ Waterworks								
Other – 1								
Other – 2								

What do you feel are the major causes of attrition for last 1 year? Please list down top 3 issues.

<u>1.</u>
<u>2.</u>
<u>3.</u>

What is your plan for expansion - Till 2025 (Choose the right answer)

Geographical Expansion	1	All Three	4
Opening up of new branches in same city	2	No expansion	5
Expansion of current establishment	3	Do not know	6

How many rooms/ seats/ employees will this unit add - Till 2025

Details	2019	2020	2021	2022	2023	2024	2025
Rooms – For Accommodation Units							
Seats – For							

Restaurants							
Employees - On the roll							
Employees - Contractual/Third party							

What is your quantum of expansion and planned investment for the step indicated above (in Rs. Crs.)

To build an extra room with amenities : 24 sq. mt OR in a new property	
In case the Wellness unit starts providing some new facility( machine)	
Increase the number of seating capacity in the existing Restaurant/Café OR a new Restaurant /Cafe	

\_\_\_\_\_

Date of Visit:  
 By:

Visited By:

Checked

Study on Employment Level and Skill Gap Analysis in hospitality and Allied sector

## Questionnaire for Travel Agents/ Tour Operators

Introduction to The Nielsen Company India & this survey

Good -----! Sir/ Madam. My name is \_\_\_\_\_. I represent, Nielsen India, the world's leading Marketing Research agency. We regularly conduct surveys on various products and services. At present we are conducting a survey titled "Study on Employment Level and Skill Gap Analysis in hospitality and Allied sector" sponsored by Ministry of Tourism, Govt. of India. In this regard I would like to ask you a few questions to better understand your opinion towards the survey product. Your opinion is very important for this study. Our intention is to obtain information, which will be used for statistical analysis only. We guarantee the complete confidentiality of your responses. Thank you for your kind cooperation

Respondent Data:

A	Name of the Establishment		
B	Name of the Respondent		
C	Full address of main establishment		
D	Contact no.		
E	E-mail		
H	Designation		
I	Establishment Type	Travel Agent	1
		Transport Operator	2
		Travel E Com Sites	3
J	Nature of Business (Multiple Select)	Domestic	1
		In bound	2

	Out bound	3
	Adventure	4
	Medical	5
	Others	6

*(Pls attach visiting card of the respondent positively)*

Please let us know in detail about your establishment

Year of Establishment	
Memberships	
Geographical Area of Operation	
Pls. familiarize us with the Departments in your organization (Pls Tick)	
Ticketing	
Accounts	
Tours	
Administration	
Operations	
Sales & Marketing	
Foreign Exchange	
IT	
Services	
Others	

Please let us know in detail about business transacted by your establishment for last 1 year

Total Tours conducted	Did it increase/ decrease over previous year? If yes, by what %
Peak Season (Average monthly business in nos.)	Lean Season (Average monthly business in nos.)

What is the breakup of employees by different Departments?

Details	2017 -18									
	<u>Ticketing</u>	<u>Accounts</u>	<u>Tours</u>	<u>Administration</u>	<u>Operation</u>	<u>Sales &amp; Marketing</u>	<u>Foreign Exchange</u>	<u>IT</u>	<u>Services</u>	<u>Total</u>
<u>No. of On the roll Employees</u>										
Branch Manager										
Marketing Manager										
Operations Manager										
Team Leader										
Travel Counselors										
Messenger/ Delivery Boys										
Sales Manager										
Deputy Manager Sales										
Executive										
Ushers										

Details	2017 -18									
	Ticketing	Accounts	Tours	Administration	Operation	Sales & Marketing	Foreign Exchange	IT	Services	Total
Guide										
Driver										
Others										
No. of Contractual/Third party Employees										
Branch Manager										
Marketing Manager										
Operations Manager										
Team Leader										
Travel Counselors										
Messenger/ Delivery Boys										
Sales Manager										
Deputy Manager Sales										
Executive										
Ushers										
Guide										
Driver										
Others										

What is the desired educational qualification and average years of experience for the following positions?



Designation	Educational Qualification (Refer Code)		Years of Experience (in Years)		Soft Skills (Refer Code)	
	Desired	Actual	Desired	Actual	Desired	Actual
Branch Manager						
Marketing Manager						
Operations Manager						
Team Leader						
Travel Counselors						
Messenger/ Delivery Boys						
Sales Manager						
Deputy Manager Sales						
Executive						
Ushers						
Guide						
Driver						
Others						

Code

Educational Qualification	MBA/CA/CS/ICWA	1	Diploma	3
	Post Graduates/ Graduates	2	High School & Below	4
Soft Skills	Leadership	5	Proficiency	16
	Problem Solving	6	Stress Management	17
	Communication	7	Time Management	18
	Customer Service	8	Emotional Intelligence	19

	Flexibility	9	Team work	20
	Behavioural Skill	10	Interpersonal relationship	21
	Coherency	11	Innovation	22
	Conviction	12	Planning	23
	Appropriateness	13	Cultural awareness	24
	Grooming	14	Multi-tasking	25
	Foreign language	15	Others	26

Do you have tie up with Hospitality training institutes for intake? Name top 5 Institutes

<u>Sl</u>	<u>Name of the Institute</u>	<u>No. of students inducted in FY 17-18</u>

Pls let us know what is the average salary structure (in Lakhs/ annum) in different Designation and Departments and type of employees for last year 2017-18

<u>Designation</u>	<u>ON THE ROLL</u>	<u>CONTRACTUAL/THIRD PARTY</u>
Branch Manager		
Marketing Manager		
Operations Manager		

Team Leader		
Travel Counselors		
Messenger/ Delivery Boys		
Sales Manager		
Deputy Manager Sales		
Executive		
Front office		
Guide		
Driver		
Others		

What is your strategy w.r.t manpower to deal with peak and lean seasons?

<u>Peak Season</u>	<u>Lean Season</u>

Please let us know in detail about attrition / retirements/ recruitment (in Nos.) from your establishment for last 1 year

<u>Departments</u>	<u>2017 -18</u>			
	<u>Attrition</u>	<u>Retirement</u>	<u>Recruitments</u>	<u>Total</u>
<u>No. of On the roll Employees</u>				
Ticketing				
Accounts				
Tours				
Administration				
Operations				

Departments	2017 -18			
	Attrition	Retirement	Recruitments	Total
Sales & Marketing				
Foreign Exchange				
IT				
Customer Support				
Others				
No. of Contractual/Third party Employees				
Ticketing				
Accounts				
Tours				
Administration				
Operations				
Sales & Marketing				
Foreign Exchange				
IT				
Others				

What do you feel are the major causes of attrition for last 1 year

<u>1.</u>
<u>2.</u>
<u>3.</u>

What do you perceive are the major skill gaps in different Departments and functional roles and how can these be addressed?

Department & Function	Perceived Skill Gap	Means to address them
Department		
Ticketing		
Accounts		
Tours		
Administration		
Operations		
Sales & Marketing		
Foreign Exchange		
IT		
Others		
Function		
Branch Manager		
Marketing Manager		
Operations Manager		
Team Leader		
Travel Counselors		
Messenger/ Delivery Boys		
Front Office		
Guide		
Driver		
Others		

What is your plan for expansion - Till 2025 (Choose the right answer)

Geographical Expansion	1	All Three	4
Opening up of new branches in same city	2	No expansion	5
Expansion of current establishment	3	Do not know	6

What is your quantum of expansion and planned investment for the step indicated above (in Rs. Crs.)

Proposed geographical Expansion (in No of cities/ locations)	Proposed investment per city (In Rs. Crs.)	Proposed Employee in new branch (in Nos.)	Proposed Expansion of branch	Proposed investment (In Rs. Crs.)	Proposed Employee in branch (in Nos.)

What is your Planned recruitment (till 2025), desired educational, soft skills and no. of years of experience?

<u>Designation</u>	<u>Planned Recruitment (in Nos.)</u>	<u>Desired Educational Qualification (Refer Code)</u>	<u>Desired Years of Experience (in Years)</u>	<u>Desired Soft Skills (Refer Code)</u>
Branch Manager				
Marketing Manager				
Operations Manager				
Team Leader				
Travel Counselors				
Messenger/ Delivery Boys				
Sales Manager				
Deputy Manager Sales				
Executive				

Front Office				
Guide				
Driver				
Others				

Code

Educational Qualification	MBA/CA/CS/ICWA	1	Diploma	3
	Post Graduates/ Graduates	2	High School & Below	4
Soft Skills	Leadership	5	Proficiency	16
	Problem Solving	6	Stress Management	17
	Communication	7	Time Management	18
	Customer Service	8	Emotional Intelligence	19
	Flexibility	9	Team work	20
	Behavioural Skill	10	Interpersonal relationship	21
	Coherency	11	Innovation	22
	Conviction	12	Planning	23
	Appropriateness	13	Cultural awareness	24
	Grooming	14	Multi-tasking	25
Foreign language	15	Others	26	

Date of Visit:

Visited By:

Checked By:

Study on Employment Level and Skill Gap Analysis in hospitality and Allied sector

**Questionnaire for Hospitality Institute**

Introduction to The Nielsen Company India & this survey

Good -----! Sir/ Madam. My name is \_\_\_\_\_. I represent, Nielsen India, the world’s leading Marketing Research agency. We regularly conduct surveys on various products and services. At present we are conducting a survey titled “Study on Employment Level and Skill Gap Analysis in hospitality and Allied sector” sponsored by Ministry of Tourism, Govt. of India. In this regard I would like to ask you a few questions to better understand your opinion towards the survey product. Your opinion is very important for this study. Our intention is to obtain information, which will be used for statistical analysis only. We guarantee the complete confidentiality of your responses. Thank you for your kind cooperation

Respondent Data:

A	Name of the Institute	
B	Full address of main establishment	
C	Name of the Respondent	
D	Contact no.	
E	E-mail	
F	Designation	
G	Programmes Offered	



(Pls attach visiting card of the respondent positively)

SECTION – A

About the Establishment

Please let us know in detail about your establishment

Year of Establishment		
Affiliations		
No. of Staffs	Dean/ Academic Head	
	Head of the Departments	
	Professors	
	Associate Professors	
	Assistant Professors	
	Non Teaching Staff	
Educational Qualification of Teaching Staff (in Nos.)	Post Doctorate	
	PhD	
	Masters	
	MBA	
	Others	
Infrastructural amenity	Computer Lab	
	Wi - fi enabled campus	
	Auditorium/ Conference facility	
	Smart Board / Projection in each Class	
	Strong IT support	

	Others	
--	--------	--

SECTION – B

About Batches

Please let us know in detail about no. of students passed out in different disciplines over last 3 years

<u>Year</u>	<u>Name of the Discipline</u>	<u>Degree/ Diploma/ Certificate</u>	<u>New Students Enrolled (Nos.)</u>	<u>Students passed out (Nos.)</u>
2015-16				
2016-17				
2017-18				

What is the educational background and cut off score sought in different disciplines

<u>Name of Discipline</u>	<u>Educational pre-requisite</u>	<u>Years of experience (if applicable)</u>	<u>Qualifying scores</u>

Do you provide Soft Skills in any of the following areas? Which areas? (Multiple)

Leadership	1	Foreign language	12
Problem Solving	2	Proficiency	13
Communication	3	Stress Management	14
Customer Service	4	Time Management	15
Flexibility	5	Emotional Intelligence	16
Behavioural Skill	6	Team work	17
Coherency	7	Interpersonal relationship	18
Conviction	8	Innovation	19
Appropriateness	9	Planning	20
Grooming	10	Cultural awareness	21
Multi tasking	11	Others	22

What are the most sought after disciplines and the reasons behind the same? (Name top 3)

<u>Sl. No.</u>	<u>Name of Discipline</u>	<u>Reasons</u>
1		
2		
3		

Who are the top recruiters of the students who pass out from the Institute? (Name Top 5)

Sl. No.	Name of Discipline	Total Recruited	Top Recruiters					Recruited By No. 3	No.4 Recruiter	Recruited By No. 4	No.5 Recruiter	Recruited By No. 5
			No.1 Recruiter	Recruited By No. 1	No.2 Recruiter	Recruited By No. 2	No.3 Recruiter					
1												
2												
3												
4												
5												

SECTION – C

About Manpower

Please let us know in detail about Total no. of employees in your institute for last year on an average

Designations	On the roll (Nos.)	Contractual/Third party/ Contract (Nos.)	Total (Nos.)
Dean/ Academic Head			
Head of the Departments			
Professors			
Associate Professors			
Assistant Professors			
Non-Teaching Staff			

What is the type of skills provided to students

<u>Professional Skills</u>	<u>Soft Skills (Refer Code)</u>

Code

Educational Qualification	MBA/CA/CS/ICWA	1	Diploma Course in Travel & Tourism/Hospitality	5
	Degree Course in Travel & Tourism/ Hospitality Management	2	Health & Hospitality Management	6
	Degree Course in Culinary Arts	3	Hotel Management & Catering Technology	7
	B.Sc Hotel Management	4	Any Other ( Pls specify)	8
Soft Skills	Leadership	9	Proficiency	20
	Problem Solving	10	Stress Management	21
	Communication	11	Time Management	22
	Customer Service	12	Emotional Intelligence	23
	Flexibility	13	Team work	24
	Behavioural Skill	14	Interpersonal relationship	25
	Coherency	15	Innovation	26
	Conviction	16	Planning	27
	Appropriateness	17	Cultural awareness	28
	Grooming	18	Multi tasking	29
	Foreign language	19	Others ( Pls specify)	

What are the discipline-wise (Top 5) no. of teachers?

<u>Sl. No.</u>	<u>Name of Discipline</u>	<u>No. of Teachers</u>
1		
2		
3		
4		
5		

Are there any vacant faculty positions?

<u>Yes</u>	<u>No</u>
------------	-----------

(If yes, move to Question No 12, else move to Question no.13)

Which of the disciplines are witnessing vacant positions? What qualifications and experience are sought for the same?

<u>Discipline</u>	<u>No. of Vacancies</u>	<u>Desired Qualification</u>	<u>Total Years of Experience</u>

Pls let us know what is the average salary structure (in Lakhs/ annum) in different Designation and Departments

<u>Designation</u>	<u>Salary Structure (In Nos./ annum)</u>	
	<u>On the roll</u>	<u>Contractual/Third party</u>
Associate Professors		
Assistant Professor		
Professors		
Head of the Departments		
Dean/ Academic Head		
Non Teaching Staff		

What do you perceive are the major barriers for your Institute and how can these be addressed?

<u>Impediments</u>	<u>Reasons</u>	<u>Ways and means to solve</u>
Marketing related		
Admission related		
Affiliation related		
Administration related		
Curriculum related		
Faculty related		

What do you perceive are the major skill gaps in different Disciplines you offer and how can these be addressed?

<u>Disciplines</u>	<u>Perceived Skill Gap</u>	<u>Means to address them</u>




SECTION – D

Future Plan

What are your future plans in increasing hospitality courses/ increasing student strength in the present courses.

<u>Category of expansion</u>	<u>Reasons for expansion</u>	<u>App. Cost in Rs. Crs.</u>
New Courses in hospitality		
Increasing student strength in present courses		
Introducing courses on soft skills		
Any Other		

What according to you in the most needed skill in the hospitality sector in next 4-5 years? Pls elaborate on why you feel so?

<u>Most needed professional skills in hospitality</u>	<u>Reasons for feeling the same</u>

<u>Most needed soft skills in hospitality</u>	<u>Reasons for feeling the same</u>

What is your plan for enrolment in the different disciplines for next 4 years? What extra skills would you be looking at for the same?

<u>Existing Disciplines</u>	<u>Planned enrolment in next 4 years</u>	<u>Educational Qualification sought</u>

New Disciplines Conceived	<u>Planned enrolment in next 4 years</u>	<u>Educational Qualification sought</u>

What is your plan for recruitment in the different disciplines for next 4 years? What extra skills would you be looking at for the same?

<u>Existing Disciplines</u>	<u>Planned recruitment in next 4 years</u>	<u>Educational Qualification sought</u>	<u>Years of Experience sought</u>
<u>New Disciplines Conceived</u>	<u>Planned recruitment in next 4 years</u>	<u>Educational Qualification sought</u>	<u>Years of Experience sought</u>

What is the infrastructural amenity and fund requirement sought for introducing the new courses that you have conceived off?

New Disciplines Conceived	Infrastructure	Fund Requirement	Other support

When do you plan to start the course? When will the first batch be out? Which Hospitality Units do you plan to target for recruitment of the passouts.

New Disciplines Conceived	First Pass out Batch Planned	Planned Placement

Date of Visit:  
 By:

Visited By:

Checked