

MARKET PULSE

Mindware: Mindshare Delivered.



Study to Assess the Requirement of Manpower in Hospitality and Travel Trade Sector



MINISTRY OF TOURISM

DEPARTMENT OF TOURISM

GOVERNMENT OF INDIA

January 2012

Market Pulse
Division of Metrix
Research & Analytics Pvt.
Ltd.
C-11, Sector 6,
Noida - 201301, U.P,
India
Ph: 0120-4076500/4078500
Fax:0120-4541157
6/10/2011

The Market
Intelligence
& Consumer
Insights
Company

TABLE OF CONTENTS

S. No.	Chapters	Page Nos.
	Acknowledgement	3
	Executive Summary	4 – 10
	Introduction	11
1.0	Terms of reference	12 – 24
	DETAILED RESEARCH FINDINGS	
2.0	Tourist Growth	25 – 27
3.0	Employment in Accommodation Units in India	28 – 64
4.0	Employment in Eating Outlets in India	65 – 88
5.0	Non-Medical Employment in Medical Wellness Units in India	89 – 109
6.0	Employment in Tour & Travel Units in India	110 - 136
7.0	Education & Training Infrastructure for the Hospitality Sector in India	137 – 143
8.0	Manpower Demand-Supply Scenario: Summary of Findings	144 – 159
	Appendix 1: Estimation Procedure	160 – 169
	Appendix 2: Questionnaires	170 – 207
	Appendix 3: Annual Demand & Supply Estimation	208 – 210
	Appendix4: List of Contacts	211 – 212

Acknowledgement

We are thankful to the Ministry of Tourism, Government of India for India assigning this study to Assess the Requirement of Manpower in Hospitality and Travel Trade Sector. We are grateful to Shri R H Khwaja, The Secretary, (Tourism) and Shri S Kothari, the Additional Secretary, (Tourism) for extending their support.

We thank Dr. R. N. Pandey, Additional Director General (MR), Shri A K Gupta, Additional Director General (MR), Mr. Devesh Chaturvedi, Additional General Director (Tourism), Mr. Vijay Kumar (Consultant, HRD), Ms. Sandhya Singh, Dy. Director (MR) and Ms. Neha Srivastava, Dy Director (MR), for providing us the necessary guidance and periodical support for conducting the study. We would also like to thank Shri S K Mohanta, DPA (Grade B) – MR for providing us the required support and help from time to time.

Last but not the least we would like to thank our entire team of research professionals as well as our staff for their co-operation and wholehearted commitment to complete this study successfully in a timely manner.

EXECUTIVE SUMMARY

Tourism industry provides employment to millions of people in India both directly and indirectly through its linkage with other sectors of the economy. In this regard, Ministry of Tourism engaged Market Pulse to estimate the requirement of manpower in hospitality and travel trade sector, so that it can take necessary steps to bridge the gap between demand and supply of manpower.

This study is based on an extensive primary field survey, analysis of secondary data as well as expert interviews. The methodology followed for this study is outlined below in brief.

- Estimation of tourists was based on government statistics relating to tourist traffic.
- Estimation of the number of hospitality units was based on a count of units in different published sources as well as a physical scan
- A sample survey assessed the employment pattern and the demand for manpower
- A survey of training institutes assessed the current training infrastructure for the hospitality infrastructure

The key findings of this study are mentioned subsequently.

1. Establishments in the Hospitality Sector

1.1 There are more than 56,000 hotels and 75,000 motels in India, with almost 95% in the unclassified category. The number of eating outlets (with more than 10 chairs each) is just over a 100,000 as of March, 2010.

1.2 Both North and West India have larger number of hotels. The Western region has the maximum number of eating outlets.

1.3 In addition, there are almost 8000 travel and tour firms and more than 1250 medical & wellness units.

2. Trend in Rooms Availability & Other Establishments

- 2.1 The number of rooms in accommodation units has almost doubled, from a little over 13.5 lakhs in 2002 to more than 27 lakhs, as of March 2010. This is due to a steep increase in the number of motels on highways as well as unclassified hotels within city limits.
- 2.2 Travel and tour units have increased from almost 6000 to over 8000 as of March, 2010.

3. Employment Intensity Norms

- 3.1 There are 204 employees per 100 rooms in hotels in the four star upwards category and approx. 152 per 100 rooms in the smaller 1 – 3 star hotels. The unclassified accommodation units have 61 employees for every 100 rooms.
- 3.2 Eating outlets have 31 employees for every 100 chairs while the travel & tour firms employ on an average 14 each.
- 3.3 Each of the medical & wellness units employ 54 people.

4. Employment in the Hospitality Sector

- 4.1 The employment statistics include permanent, temporary as well as employees of third party vendors to whom services have been outsourced. Total employment has risen to almost 39 lakhs in March, 2010, an increase of almost 50% in the last 8 years.
- 4.2 Employment in all accommodation units and motels has more than doubled, from a little over 8.5 lakhs in 2002 to more than 18.5 lakhs, as of March 2010. Employment in eating outlets as well as travel and tour firms has registered a marginal increase and has reached 18.7 lakhs and 96,000 respectively, in March, 2010.
- 4.3 Employment in accommodation units in the North is the highest, followed by Western region. The largest number of eating outlets happens to be in the West.
- 4.4 Medical & wellness units now employ nearly 68,000.

5. Employment Pattern

- 5.1 Housekeeping, followed by F&B and front office, together account for 68% of the workforce in the hotels industry. Administration and security are the other large functions by employment.
- 5.2 In restaurants and other eating outlets, F&B service closely followed by the kitchen account for close to 70% of all employees.
- 5.3 In travel & tour firms, tours and ticketing functions employ half the total workforce, followed by accounts and administration.
- 5.4 Only half of the employees in the key functional domains were reported to have been formally trained in both hotels and the travel trade while in restaurants & other eating outlets, this proportion fell further to 35%.
- 5.5 Managerial staff account for only 16% of the employee strength in key functions of both hotels and restaurants. This was reported to be higher in travel trade and stood at 21%

6. Employment Forecast

- 6.1 The total employment is likely to increase to 76 lakhs by March, 2022. Accommodation units will have the largest number of employees at over 44 lakhs, followed by eating outlets at 24 lakhs. Medical wellness is also likely to become a substantial employer, with a little over 600,000.
- 6.2 Growth in employment in travel trade is likely to be marginal; total number of employees will remain at just over 119,000.

7. Annual Manpower Demand

7.1 Gross annual demand of employees in the hospitality sector has crossed 500,000 in 2009 – 10 and is likely to grow to almost 920,000 in 2021 – 22.

7.2 Currently, eating outlets account for half of this annual demand. However, by 2022, the annual demand for people in hotels will surpass that in eating outlets.

7.3 Annual demand of employees at the entry level in travel trade touched 14,000 while it stood at over 6000 in medical & wellness units.

7.4 A bulk of the annual demand for manpower, at more than 240,000, comes from the Western region. This is because of the higher number of eating outlets in the region and also, because of the quicker growth expected in the accommodation units.

8. Training Institutes in Hospitality Sector

8.1 This research has estimated a total of 337 training institutes (March 2010) in the hospitality sector. This includes 38 government owned hotel management and food craft institutes and almost 200 others which are either affiliated to a university or approved by the AICTE. In addition, there are about 101 travel & tour institutes offering courses related to ticketing and tourism.

8.2 Western region has a lower number of institutes.

8.3 Almost 63000 students completed various courses from the different institutes in the year 2010. Of this, nearly 22,000 graduated with hotel and tour & travel management degrees.

8.4 Almost 61% of all the graduating students were placed in hotels. Only 11% joined restaurants and almost 28% were placed outside hotels and restaurants.

8.5 A sizeable proportion of the teaching faculty comprises visiting staff. The teaching faculty appears to be less experienced. There will be a need to reinforce the teaching staff strength as the training infrastructure grows.

9. Demand – Supply Gap in Manpower for Hospitality Sector

9.1 There is already a gap of nearly 478,000 between manpower demand and supply in 2009 - 10. This has arisen because of the following reasons:

- Training infrastructure has not kept pace
- Substantial growth of hotels and thus, demand for manpower
- Significant attrition rate

9.2 The gap between demand and supply of non-managerial manpower is likely to be huge in case corrective steps are not taken. In addition, there is already a shortfall of almost 62,000 hotel management graduates in this sector.

Annual Employment Supply – Demand Gap (in Lakhs)			
Segments	2011 – 12	2016 – 17	2021 – 22
Total	5.13	6.35	8.64
Managerial	0.62	0.78	1.09
Non-Managerial	4.51	5.58	7.55

10. Recommendations for Bridging Manpower Demand – Supply Gap

10.1 In view of the rapid rise in tourism, training infrastructure has to be augmented. Otherwise, the gap that already exists between demand and supply of manpower in the hospitality sector will increase.

10.2 A larger number of food craft institutes are needed at the regional level. Infrastructure of IHMs should be enhanced to handle larger batches of students.

10.3 While both degree and food craft courses are needed across India, the western region in India needs particular attention to meet the demand from a large population of restaurants and expected rapid growth in hotels.

10.4 Short-term certificate courses of 3 – 6 months can be used to bridge the yawning gap in manpower demand and supply for restaurants. HSR scheme should be leveraged here; its awareness in the industry should be enhanced.

10.5 Simultaneously, students will have to be attracted to meet the increasing demand. An awareness campaign is needed to build the attractiveness of the hospitality sector.

10.6 Formal training is required to produce both managerial and non-managerial personnel. Travel trade does not need any increase in training infrastructure while the following functions in hotels and restaurants need urgent attention:

- Food & beverage (service & kitchen including multiple cuisines)
- Housekeeping, Hotel administration & Security
- New functions such as management of spa and night clubs

10.7 Hotel management training needs reinforcement at different levels. Some of the important measures that can be taken are as follows:

- Proper selection of students on the basis of written test, personality and aptitude to prevent attrition at a later stage
- Focus on grooming and communication skills needs to be brought in
- Practical exposure through on the job training during the course
- Exposure to foreign languages needs to be introduced
- Standardization and monitoring of curricula in private institutions

1.0 INTRODUCTION

India has tremendous potential to become a major global tourist destination and the tourism industry is exploiting this potential. The foreign tourist arrivals crossed the 5 million mark while domestic tourist visits reached 650 million in 2009 at an annual growth of 15.5%.

Tourism industry's contribution to Indian economy is immense. Travel and tourism industry is already a large contributor to foreign exchange earnings for India; foreign exchange earnings from tourism touched US\$11.39 billion in 2009.

The Ministry of Tourism is the nodal agency for the development and promotion of tourism in India. It has carried out the successful "Incredible India" campaign.

Tourism industry provides employment to millions of people in India both directly and indirectly through its linkage with other sectors of the economy. In this regard, Ministry of Tourism engaged Market Pulse to estimate the requirement of manpower in hospitality and travel trade sector, so that it can take necessary steps to bridge the gap between demand and supply of manpower.

1.2 TERMS OF REFERENCE

The terms of reference and scope of the tourism survey are as follows:

1. To assess the growth in tourism in India in terms of foreign tourist arrivals, domestic tourist visits and foreign tourist visits for the years 2009-10, 2011-12, 2016-17 and 2021-22 with break-up of domestic and foreign tourist visits in different regions of India (North, South, East, West and North-East).

2. To estimate the number of establishments in each region of India under following categories as on 1st April of each of the years 2010, 2012, 2017 and 2022:-

i) Classified Hotels

- 1 Star
- 2 Star
- 3-Star
- 4-Star
- 5-Star
- 5-Star Deluxe
- Heritage Hotels

ii) Unclassified Hotels & other accommodation units

- Unclassified Hotels
- Guest Houses and Motels
- Bed & Breakfast units/ Homestay units
- Others

iii) Restaurants of different types, including dhabas

- Stand-alone restaurants/ Sweet shops having a seating capacity of 10 or more
- Fast food units having a seating capacity of 10 or more
- Dhabas

iv) Wellness units catering primarily to tourists;

v) Medical units catering primarily to foreign tourists;

vi) Tour operators and travel agencies, including e-portals relating to tourism

3. To estimate the requirement of work force as on 1st April of each of the years 2010, 2012, 2017 and 2022 in each region of India in different categories of establishments specified at S. No. 2, with its desegregation into **functional domain x level of operation x level of training**.

Functional domains:

- I. Food production
- II. Food and beverages services
- III. Front office operation
- IV. Housekeeping, and
- V. Ancillary services (all domains excluding (i) to (iv))

Level of operation (only for functional domains (i) to (iv)):

- I. Managerial (i.e. the level of supervisor or above)
- II. Non-Managerial

Level of training (only for functional domains (i) to (iv)):

- I. Formally trained (training period 6 weeks or more)
- II. Trained on the job (training period 6 weeks or more)
- III. Untrained

4. Estimation of likely supply of manpower in the years 2009-10, 2011-12, 2016-17 and 2021-22 in various categories mentioned at S. No. 3 above, as per the existing and already planned human resource development infrastructure in the country.

5. The estimation of number of establishments and work force in 2010 should be done on the basis of a representative primary survey having adequate sample size for reliable estimates at regional level in various categories. The survey should also provide information about:

- I. Norms of persons employed per hotel room/ establishment, with the level of disaggregation as specified at S. No. 3;
 - II. Attrition rate among various types of establishments specified at S. No. 2 with detailed break-up specified at S. No. 3 (attrition should be in respect of those leaving the hospitality and travel trade sector for non-tourism sectors such as IT, ITES, marketing, etc.); and
 - III. Views of the employers about the desirability of hiring skilled persons in their establishments.
 - IV. The method/ process adopted by hospitality and tourism sector establishments for hiring persons
6. To find out if, as on 1st April of 2010, 2012, 2017 and 2022, there is a gap between the number of trained persons required for establishments of various categories specified in S. No. 2, and the number of trained persons available. If so, to suggest a strategy for bridging this gap, as also to assess the number of teachers/ trainers required.

1.3 OBJECTIVES, APPROACH AND COVERAGE

1.3.1 Objectives

A. The key deliverables of this study are as follows:

- Workforce requirement in 2010 and forecast for 2012, 2017 and 2022 in each region of India, in different categories of establishments specified in ToR, with its de-segregation into **functional domain x level of operation x level of training**.
- Likely supply of manpower in the years 2009-10, 2011-12, 2016-17 and 2021-22 in various categories mentioned, as per the existing and already planned human resource development infrastructure in the country.

B. The inputs for computing the workforce requirement are mentioned below.

1. Number of domestic and foreign tourists for the years 2009-10, 2011-12, 2016-17 and 2021-22 with break-up of domestic and foreign tourist visits in different regions of India (North, South, East, West and North-East).

2. To estimate the number of establishments in each region of India under specified categories as on 1st April of each of the years 2010, 2012, 2017 and 2022

3. Employment pattern

- Number of persons employed per hotel/ establishment
- Attrition rate among various types of establishments
- Recruitment pattern for hiring skilled persons in the establishments
- Process adopted by hospitality & tourism sector establishments for hiring persons

C. On the basis of the demand – supply position, a strategy for bridging the gap between the requirement and the availability of the trained persons, needs to be formulated.

D. Assessment of the number of teacher/ trainers required in the institutes related to hospitality and tourism sector.

1.3.2 Proposed Approach

This study is based on an extensive primary field survey, analysis of secondary data as well as expert interviews. The different activities and the information areas of each are mentioned in the table below.

Objective	Activity	Information Areas
Estimation of tourists	Analysis & tourist statistics for the years 2005 – 09	Tourist growth Forecast of tourists in each geographic region
Estimation of number of hospitality units	Counting of units from published sources – Yellow pages, trade directories & government records Comparison with physical scans	Number of accommodation units, restaurants, travel & tour and medical wellness units
Assessment of demand for manpower	Sample survey of hospitality units	Employment intensity Hiring & attrition pattern Profile of employees
Assessment of current training infrastructure	Sample survey of training institutes	Size of graduating class Placement pattern Profile of teaching faculty

The following types of sources of secondary data were used for the study:

- Ministry of Tourism; Regional offices of India Tourism & State tourism offices
- FHRAI; Regional hotel associations; Local hotel associations
- Hospitality and tour & travel related journals

- All India Council For Technical Education; Directorate of Education
- Local bodies like - Municipal corporations and police stations
- Local market associations; Local telephone directories
- Yellow pages and directories
- Economic census 2005

1.3.3 Coverage

1. Cities

The primary field survey has been carried out in 37 important tourist destinations. These have been selected on the on the basis of their tourist traffic and number of hotels.

Region	Cities	Region	Cities
East	Patna	North East	Guwahati
	Bodhgaya		Shillong
	Ranchi		Gangtok
	Bhubneshwar	South	Hyderabad
	Puri		Tirupati
	Kolkata		Bangalore
			Mysore
North	Delhi		Cochin
	Gurgaon		Thiruvanthapuram
	Shimla		Chennai
	Jammu		Ooty
	Amritsar		Pudducherry
	Jaipur	West	Goa
	Udaipur		Ahmedabad
	Agra		Bhopal
	Varanasi		Khajuraho
	Haridwar		Aurangabad
	Chandigarh		Mumbai
			Pune
			Raipur

2. Coverage of Establishments

Hotels	All star category & heritage hotels Unclassified Hotels; Guest Houses and Motels Bed & Breakfast units/ Home-stay units Others registered with municipal bodies or hotel associations. Various small hotels/ guest houses/ inns scattered in residential areas or located in pockets near the railway station, inter-state bus depots, etc.
Restaurants	All conventional restaurants registered with municipal bodies or listed in telephone/trade directories; Stand-alone restaurants/ Sweet shops having a seating capacity of 10 or more Fast food units having a seating capacity of 10 or more <i>Dhabas</i> having a seating capacity of 10 or more.
Others	Railway, airlines and cruise-line catering services
Medical/ wellness establishments	Wellness units and hospitals catering to medical tourism
Travel & Tour Operators	Organized sector players registered with TAAI Other small and medium sized travel agencies E -ticketing portal
Hotel Management and Travel & Tour Institutes	Those registered with NCHMCT Private sector institutes; Food craft institutes ITI/ Vocational institutes; Universities Air Hostess training institutes

3. Coverage of Highways

National and state highways were scanned to determine the number of accommodation units and eating outlets. In case of both national and state highways, a stretch of 100 km was covered in each region.

1.4 SAMPLING TECHNIQUES/ DESIGN

1.4.1 Sample survey of establishments

A random sample survey of establishments (Accommodation units, eating outlets, wellness units, medial units, tour operators and travel agencies) has been carried out in the selected cities. This has been done in such a way that all categories & geographical regions get adequate representation.

1.4.2 Sample survey of institutes

A census survey of all government owned institutes and a random sample survey of privately owned institutes (Hotel Management and Travel & Tour Institutes) has been carried out in the selected cities.

1.5 SAMPLE SIZE

Survey Segment	Sample size
Star category & heritage hotels	400
Unclassified hotels	1000
Restaurants	2000
Medical/ wellness establishments	30
Travel & Tour Operators	250
Hotel Management and Travel & Tour Institutes	150
Total	3830

TARGET INFORMANTS

Following were the target respondents for the study:

- HR Managers/ owners of the accommodation units
- HR Managers/ owners of the restaurants
- HR Managers of the wellness and medical units
- HR Managers/ owners of the tour and travel units
- Principals of training institutes
- Concerned officers in Ministry of Tourism, State Tourism offices, regional/ local hotel associations and in Municipal Corporation.

1.6 QUESTIONNAIRES CANVASSING

Seven sets of questionnaires have been used for the survey.

- Accommodation units
- Restaurants
- Wellness & Medical units
- Tour and travel units
- Hotel management institutes
- Tour and travel institutes

The questionnaires for the survey are attached in Appendix 2. The questionnaires were pre-tested through a pilot survey and finalized in consultation with the Market Research Division, Ministry of Tourism.

1.7 METHOD OF INQUIRY

The method of inquiry comprised face to face personal interviews.

Executives having proficiency in local and English language were used. Structured questionnaires were administered to capture the feedback. Field staff carried a letter

from the Market Research Division, Ministry of Tourism mentioning the purpose of the study.

1.8 CONDUCT/ CONTROL OF FIELD OPERATION

Structured questionnaires were administered by a team of trained executives for the survey of accommodation units, restaurants, wellness units, medical units, tour and travel units, hotel management institutes and tour and travel institutes.

Each team of executives was supervised by an operations manager. He ensured authenticity of the data collected. The project manager stationed at our Head Office was responsible for this assignment; he/ she also travelled to selected cities as and when required.

We ensured quality and reliability of the field survey through the following quality control process.

Back-check process: Approx. 40% of the questionnaires were called back to ensure data reliability. Any batch of questionnaires found with even one back-checked questionnaire that does not conform to the original was rejected.

Scrutiny Process: A 100% scrutiny of the filled-up questionnaires helped establish data consistency and reliability.

Data Entry Checks: A sample of 5% of the questionnaires were picked up for verification and quality control process.

1.9 ESTIMATION METHODOLOGY

The step-wise estimation methodology is summarized below.

Step 1.0: Tourist Traffic Estimation & Growth Projection

Step 2.1: Estimation of Number of Accommodation Units/ Restaurants, etc.

Step 2.2: Growth in Number of Accommodation Units/ Restaurants, etc.

Step 2.3: Work Force Requirement (2010, 2012, 2017 & 2022)

Step 2.4: Recruitment of Trained Manpower (2010, 2012, 2017 & 2022)

Step 3.0: Estimation of Supply of Skilled Manpower

Step 2 has been carried out for each of the hospitality segments under study. The above is discussed in detail for the different categories under study.

Step 1: Tourist Traffic Estimation & Growth Projection

- Tourist traffic for 2009 – 10 as published by Ministry of Tourism has been considered
- Tourist traffic projections for the next 10 years is based on recent growth statistics for each region

Step 2.1: Estimation of Number of Hospitality Units

Hospitality Segment	Estimation Methodology
Accommodation units Restaurants	For each city included in the study, number of accommodation units was obtained from at least two of the following sources: local hotel association, State tourism office or Municipal corporation. The largest estimate was then used. Physical scanning of accommodation units in a pocket compared with the earlier estimate. If the former method revealed a higher number of units, the ratio thus ascertained was then applied to the number counted from the earlier estimate.
Motels on highways	Number of motels on a sample stretch of highways was counted. This was extrapolated to the total length of highways in each region, as per NHAI.
Travel & tour units	Number of travel & tour operators has been estimated from the Yellow Pages and the database of registered operators with the Ministry of Tourism. Ratio of these two estimates for a region has been applied to the total number of registered operators, to

	arrive at the number of operators for each region.
Medical & Wellness units	Estimate was developed on the basis of an Internet search of reliable documents and reports in the public domain

- Ratio of the total tourist traffic of a region to that of the selected research centres was applied to the sum of all accommodation units estimated in those research centres to arrive at the total number of units in a region.
- Ratio of the total population of a region to that of the selected research centres was applied to the sum of all restaurants estimated in those research centres to arrive at the total number of restaurants in a region.

Step 2.2: Growth in Number of Hospitality Units

Hospitality Segment	Estimation Methodology
Accommodation units	Growth in star category hotels has been computed on the basis of statistics provided by the Ministry for the period 2004 - 10. Number of unclassified accommodation units was determined in the earlier study in 2003 as has been done in the current study for the year 2009 - 10. The average growth has then been computed for this period.
Motels on highways	Growth is computed on the basis of increase in length of highways over the period 2002 – 10 and number of motels per 100 kms.
Restaurants	Population growth has been assumed as the growth rate for restaurants. The earlier study in 2003 has not been used because the criterion of restaurants having at least 10 chairs has been applied this time.
Travel & tour units	The growth in employment from 2002 to 2010, as per the two surveys, has been computed.
Medical & Wellness units	Growth estimate is based on a paper published by FICCI and E&Y in 2009 on 'Indian Wellness Industry'

Study to Assess the Requirement of Manpower in Hospitality and Travel Trade Sector

Step 2.3: Work Force Requirement (2010, 2012, 2017 & 2022)

- The sample survey ascertained the employment intensity in each hospitality segment (number of employees per 100 rooms in accommodation or per 100 units) in each of the functional domains, levels of operation & training, in each region.
- For each subsequent year, employment intensity was assumed as constant. This was applied to the number of hospitality units projected as per Step 2.2, in each segment.

Step 2.4: Recruitment of Trained Manpower (2010, 2012, 2017 & 2022)

- The sample survey in each hospitality segment also ascertained the recruitment intensity at the entry level in 2010 as a proportion of the total work force in each of the functional domains, levels of operation & training, in each region.
- This ratio was applied to the workforce computed in Step 2.3, in the future after accounting for the proportion of trained manpower.

Step 3.0 Estimation of Manpower Supply

- Workforce supply has been computed on the basis of a sample survey of training institutes.
- Census survey of all government institutes and a sample survey of privately owned institutes in the selected cities has been conducted.
- Growth forecast of graduating class of students has been done on the basis of growth in size of the graduating class as well as growth in number of institutes. The latter has been done estimated from the growth in numbers revealed by the current survey and the previous one in 2003 – 04.
- The universe of training institutes has been mapped using published sources and websites.

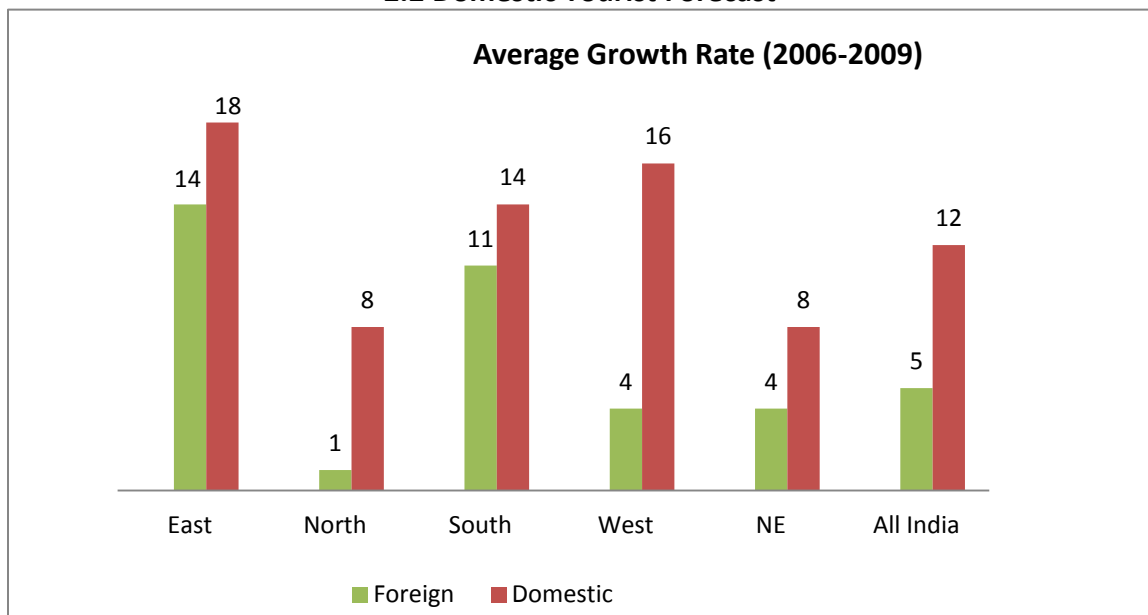
CHAPTER 2.0

TOURIST GROWTH

2.1 Tourist growth in India

On an overall basis, foreign tourist traffic has grown by 5% per annum, with higher growth rates having been registered in East and South regions. On the other hand, domestic tourists have grown by 12% per annum. Northern region has lagged behind in growth terms.

2.2 Domestic Tourist Forecast



The domestic tourist traffic would cross 3 billion in the year 2022. Southern region is likely to witness the highest tourist traffic then.

Domestic tourists				
Region	2010	2012	2017	2022
East	60353631	83773467	190157832	431640256
North	227644346	263715698	380919990	550213887
South	357233248	463153365	886456039	1696639535
West	75016927	100282450	207199688	428107916
North East	5388153	6282982	9225300	13545506
All India	725636305	917207962	1673958850	3120147100

2.3 Foreign Tourist Forecast

Foreign tourists will cross 33 million in 2022, with the maximum contribution coming from the Southern region.

Foreign tourists				
Region	2010	2012	2017	2022
East	1887136	2442649	4655923	8874638
North	5288713	5334302	5450001	5568209
South	4356178	5317787	8755769	14416426
West	2790854	3027580	3711005	4548703
North East	38528	41340	49301	58796
All India	14361409	16163657	22621999	33466772

CHAPTER 3.0

EMPLOYMENT IN ACCOMODATION UNITS IN INDIA

3.1 A Snapshot of Employment in Accommodation Units

	East	North	South	West	N. East	All India
Total Number of Accommodation units 2010	15452	42772	27860	36007	9738	131829
Total Employment	167168	696349	404825	509034	86220	1863595
Employment Intensity in 4 Star upwards Hotels (per 100 rooms)	167	204	240	170	172	204
Employment Intensity in 1 – 3 star hotels (per 100 rooms)	122	139	171	128	118	152
Employment Intensity in unclassified hotels/Motels	54	74	43	73	43	61
New recruits at entry level	18369	87361	39331	64419	10226	219706
Trained manpower supply (students who passed out in 2009-2010)	--	--	--	--	--	27796
Maximum Growth % in Hotel Segments	6	4	12	11	11	7

- Growth in accommodation units and employment is based on the growth in hotel rooms registered in the period 2002 – 2010.
- Star category statistics have been obtained from Ministry of Tourism statistics while the unclassified hotels statistics have been obtained from Market Pulse surveys in 2002 & 2010.
- Employment intensity has been computed on the basis of Market Pulse survey in different segments.
- Universe of training institutes has been mapped on the basis of NCHMCT data, data from Ministry of Tourism (H&R division) as well as other private sector databases/ lists and the Yellow Pages.

3.2 Accommodation Units in India

In all, there are almost 56,792 hotels and 75000 motels in India, with 4% in the star category. There are a total of 2229 star category hotels in India; of these, a little over 26%, that is 599, are 4 star upwards hotels. North India has the largest number of five/ four star hotels followed by the Southern region. North India also accounts for almost 40% of all accommodation units in India.

Number of Accommodation Units in March 2010				
Region	4 Star upwards Hotels	1 – 3 Star Hotels	Unclassified Units	Motels
East	40	67	2937	12407
North	237	276	20870	21389
South	183	911	10290	16477
West	134	348	19731	15794
North East	5	28	735	8970
All India	599	1630	54563	75037

3.2.1 Profile of Unclassified Accommodation Units

Guest houses/ lodges and inns also account for 44% of the unclassified accommodation units.

Type of Accommodation Unit		
	Numbers	%
Apartment Hotel	546	1
Non-Star Hotel	28918	53
Guest House/Lodge/Inn	24008	44
Youth/YMCA Hostel	55	0.1
Dharamshala/Sarai/Musafirkhana	382	0.7
Bed & Breakfast Unit	382	0.7
Others	273	0.5
Total	54563	100

3.2.2 Rooms availability in India

There are over 2.7 million rooms available in the accommodation units across India, with almost 39% of them being in North India. Most of them are in the unclassified category.

Number of Hotel Rooms in March 2010				
Region	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels
East	3810	2725	94083	173730
North	25236	9151	609974	299499
South	20206	33291	369977	230697
West	17875	16086	441438	221143
North East	298	930	17371	125606
All India	67425	62183	1532844	1050675

3.3 Employment Pattern

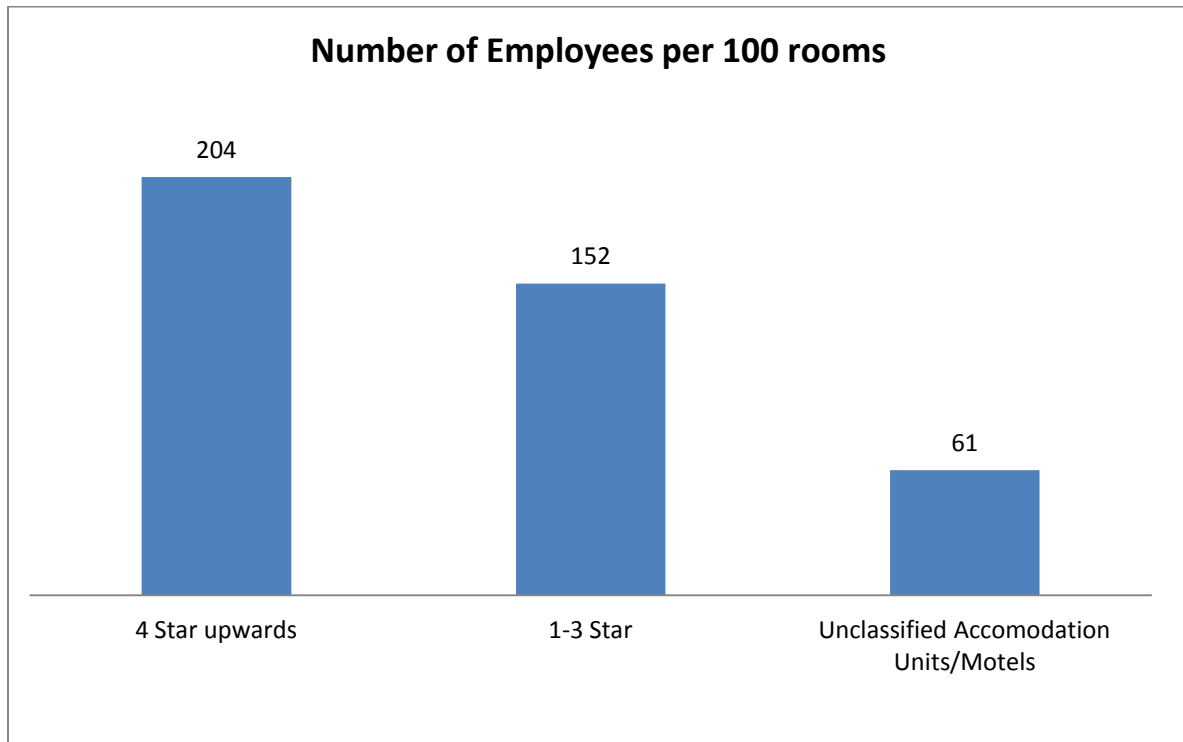
3.3.1 Employment in Accommodation Units

The accommodation units employ more than 18.5 lakhs people across various functions, in India. Almost 37% of them are employed in North India.

Total Employees in March 2010				
Region	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels
East	6371	3322	50805	106670
North	51357	12740	448360	183892
South	48547	57028	157602	141648
West	30423	20611	322218	135782
North East	513	1097	7488	77122
All India	137211	94798	986474	645113

3.3.2 Employment Intensity (Number of Employees per 100 rooms)

There are 204 employees per 100 rooms in five & four star hotels; this dips to 152 per 100 rooms in the smaller 1 – 3 star hotels. The unclassified accommodation units/Motels have 61 employees for every 100 rooms.



3.3.3 Employment Pattern by Functional Domains

Housekeeping, followed by F&B and front office, together account for 68% of the workforce in the hotels industry. Administration and security are the other large functions by employment.

Functional Domain	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels	Total	% in Functional Domains
Administration	4202	5362	88309	57751	155624	8
Front office	9532	7459	126234	82552	225777	12
F&B (service)	27967	19041	172864	113046	332918	18
F&B(Kitchen)	25375	18319	144135	94258	282087	15
House keeping	25254	16495	232336	151938	426023	22
Accounts	5191	3319	42060	27505	78075	4
EDP	1091	854	7509	4910	14364	1
Security	15176	11313	53541	35013	115043	7
Sales & Marketing	3397	1585	14201	9287	28470	2
Purchase & stores	2082	1870	13712	8967	26631	1
Human resource	1676	1032	3972	2597	9277	1
Public relation	510	537	2503	1637	5187	0.3
Maintenance/Eng	9565	4553	40319	26367	80804	4
Telephone	1379	698	9195	6014	17286	1
Health club/ Swimming	2325	289	3754	2455	8823	1
Laundry	2422	2023	30579	19998	55022	3
Others	68	49	1251	818	2186	0.1
Total	137211	94798	986474	645113	1863596	100

Employees in outsourced functions account 23% of the workforce in 4 star upward hotels and 6% in 1-3 Star categories. Of all the outsourced staff, 28% are in Housekeeping, 27% in security, 23% in F&B Service followed by 11% in F&B Kitchen.

3.3.4 Employment Pattern by Level of Operation

Five key functions employ almost 14 lakh people, more than 75% of the total workforce. Managerial staff account for only 16% of the employee strength in key functions. Housekeeping has the least number of managerial staff.

Total Employees in March 2010		
Function Domain	Managerial	Non-managerial
Administration	88079	67545
Front office	35905	189872
F&B (service)	53267	279651
F&B(Kitchen)	29131	252956
House keeping	7001	419022
Total	213383	1209046

3.3.5 Employment Pattern by Level of Training

Almost half of the employees in the key functional domains were reported to have been formally trained.

Total Employees in March 2010			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	81200	65262	9162
Front office	98598	102245	24934
F&B (service)	176855	128110	27953
F&B(Kitchen)	143673	103861	34553
House keeping	148202	193556	84265
Total	648528	593034	180867

3.3.6.0 Proportion of Temporary Employees

The unclassified accommodation units have a larger proportion of temporary employees at 17%. This is particularly high in functions such as EDP, security, maintenance, laundry and even housekeeping. Hiring of temporary employees for security is high across different categories of accommodation units.

% Employees who are Temporary			
Functional Domain	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Administration	7	2	6
Front office	6	9	8
F&B (service)	11	12	14
F&B(Kitchen)	11	13	15
House keeping	13	16	21
Accounts	4	8	11
EDP	22	6	34
Security	36	33	28
Sales & Marketing	12	13	6
Purchase & stores	6	7	2
Human resource	1	6	7
Public relation	0	1	13
Maintenance/Eng	9	15	30
Telephone	6	5	14
Health club/Swimming	14	17	1
Laundry	20	36	57
Others	44	25	13
Total	12	14	17

3.3.7 Employee Turnover

Employee turnover refers to the % of workforce that leaves the hotels annually. The rate of employee turnover in the star category hotels was in the range of 11 – 12% in the previous year. However, it touched 20% in the other hotels.

% Employee Turnover Rate			
Functional Domain	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Administration	15	7	22
Front office	12	18	23
F&B (service)	9	13	23
F&B(Kitchen)	15	13	18
House keeping	9	11	19
Accounts	11	9	15
EDP	6	10	15
Security	6	11	17
Sales & Marketing	9	22	19
Purchase & stores	5	11	14
Human resource	8	9	25
Public relation	16	8	17
Maintenance/Eng	9	11	18
Telephone	19	9	21
Health club/Swimming	9	11	33
Laundry	5	10	8
Others	0	17	4
Total	11	12	20

3.4 Recruitment Pattern

3.4.1 Annual Demand for Manpower at Entry Level

The recruitment at the entry level touched approximately 217905 in 2009 – 10. Recruitment was as high as 12.5% as a proportion of total employment, in the unclassified hotels and 5 – 10% in the star category hotels.

Annual Demand for Manpower at Entry Level (April 2009 - March 2010)				
Region	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels
East	107	204	4724	13334
North	2100	830	61443	22986
South	3034	3828	14763	17706
West	1731	4071	41645	16973
North East	17	136	433	9640
All India	6989	9069	123008	80639

Annual Demand for Manpower at Entry Level (April 2009 - March 2010)				
Functional Domain	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels
Administration	172	367	11012	7219
Front office	771	1284	15741	10319
F&B (service)	2353	2144	21555	14131
F&B(Kitchen)	1138	1442	17973	11783
House keeping	1016	1908	28971	18993
Accounts	228	293	5245	3439
EDP	22	131	936	614
Security	405	556	6676	4377
Sales & Marketing	118	223	1771	1161
Purchase & stores	54	101	1710	1121
Human resource	83	55	495	325
Public relation	6	22	312	205
Maintenance/Eng	403	310	5028	3296
Telephone	72	88	1147	752
Health club/Swimming	33	3	468	307
Laundry	106	142	3813	2500
Others	9	0	155	100
Total	6989	9069	123008	80639

3.5. Forecast (2012 – 2022)

3.5.1 Growth in Hotels

	East	North	South	West	N. East
% Growth in 4 Star upwards Accommodation units	9	10	17	9	11
% Growth in 1 – 3 Star Accommodation units	3	0	12	8	14
% Growth in Unclassified Accommodation units	5	2	6	15	7
% Growth in Motels	2	2	2	2	2

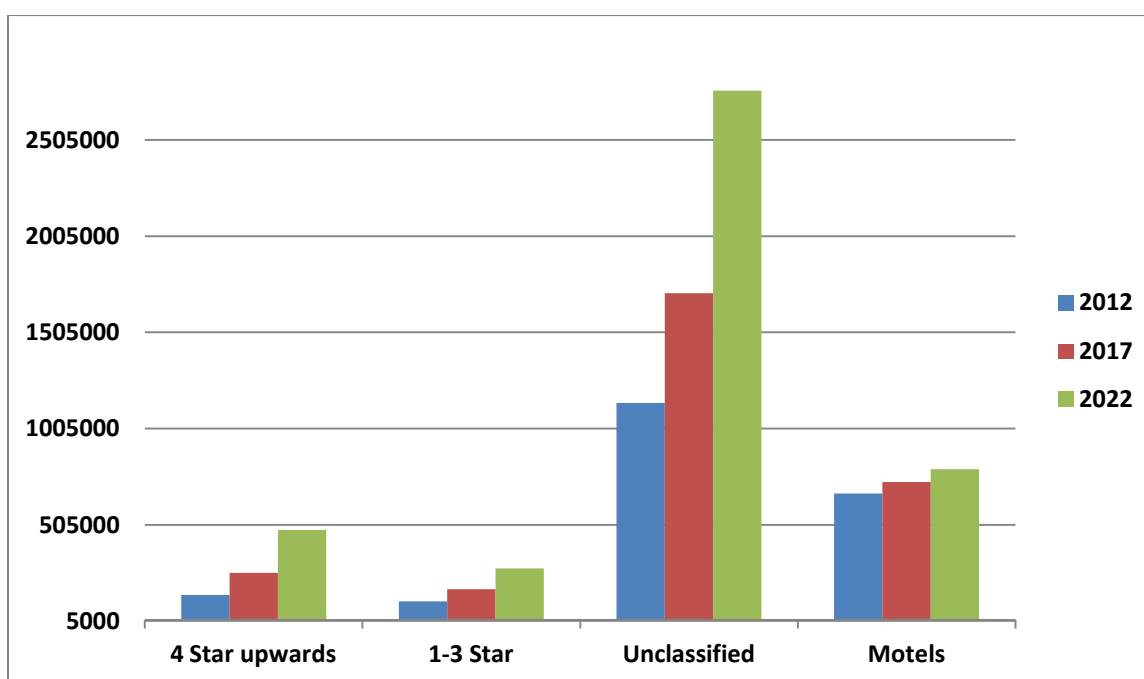
3.5.2 Forecast of Number of Accommodation Units

Number of Accommodation Units – March 2012				
Region	4 Star upwards Hotels	1 – 3 Star	Unclassified Units	Motels
East	49	71	3265	12842
North	284	278	21846	22139
South	252	1142	11479	17053
West	159	405	26175	16347
North East	6	37	837	9285
All India	750	1932	63602	77666

Number of Accommodation Units – March 2017				
Region	4 Star upwards Hotels	1 – 3 Star	Unclassified Units	Motels
East	76	84	4255	13997
North	448	284	24491	24129
South	557	2007	15087	18586
West	245	590	53056	17816
North East	10	72	1158	10119
All India	1338	3036	98048	84648

Number of Accommodation Units – March 2022				
Region	4 Star upwards Hotels	1 – 3 Star	Unclassified Units	Motels
East	119	99	5545	15255
North	707	289	27456	26298
South	1235	3527	19830	20257
West	378	859	107543	19418
North East	17	141	1603	11029
All India	2457	4916	161977	92257

3.6 Employment Forecast (2012 – 2022)



3.6.1.1 Employment Forecast by Hotel Segment (March 2012)

The employment in all categories of hotels will touch almost 20 lakhs in 2012, increasing to more than 44,00,000 in 2022. Of this, more than 7.5 lakhs will be in the star category of hotels.

Number of Employees in March 2012				
Region	4 Star upwards Hotels	1 – 3 Star	Unclassified Units	Motels
East	7610	3543	56481	110407
North	61612	12841	469334	190334
South	66740	71462	175812	146610
West	36167	23961	427452	140538
North East	631	1437	8528	79824
All India	172760	113243	1137607	667713

Note: Forecast in star category hotels is based on the growth in hotel rooms registered in the period 2004 – 2010 and a constant employment intensity. Similarly, forecast in unclassified hotels is based on the growth in hotel rooms registered in the period 2002 – 2010 and a constant employment intensity.

3.6.1.2 Employment Forecast 2012 by Function Domain

Total Employees in March 2012					
Functional Domain	Total	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels
Administration	174910	6507	6790	101839	59774
Front office	254827	14364	9445	145574	85444
F&B (service)	374637	34172	24111	199348	117006
F&B(Kitchen)	321901	34927	23196	166217	97561
House keeping	474063	27985	20886	267931	157261
Accounts	89215	8040	4202	48504	28469
EDP	16115	1292	1082	8659	5082
Security	118290	12775	7532	61743	36240
Sales & Marketing	33257	5261	2007	16377	9612
Purchase & stores	30686	3225	2368	15812	9281
Human resource	11172	2596	1307	4581	2688
Public relation	6048	789	679	2886	1694
Maintenance/Eng	91582	12031	5765	46496	27290
Telephone	19449	1738	883	10604	6224
Health club/ Swimming	10439	3202	366	4330	2541
Laundry	62274	3751	2561	35264	20698
Others	2456	103	63	1443	847
Total	2091323	172760	113243	1137607	667713

3.6.1.3 Employment Forecast 2012 by Level of Operation

Total Employees by Level of Operation – March 2012		
Function Domain	Managerial	Non-managerial
Administration	97771	77139
Front office	40757	214070
F&B (service)	59942	314695
F&B(Kitchen)	34042	287860
House keeping	7909	466154
Total	240421	1359918

Study to Assess the Requirement of Manpower in Hospitality and Travel Trade Sector

3.6.1.4 Employment Forecast 2012 by Level of Training

Total Employees by Level of Training in March 2012			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	99394	66210	9306
Front office	111907	115142	27778
F&B (service)	200184	143363	31090
F&B(Kitchen)	166608	116257	39036
House keeping	165917	215238	92908
Total	744010	656210	200118

3.6.2.1 Employment Forecast by Hotel Segment (2017)

Employment Forecast – March 2017				
Region	4 Star upwards Hotels	1 – 3 Star	Unclassified Units	Motels
East	11865	4163	73602	120332
North	97124	13097	526160	207445
South	147891	125612	231083	159790
West	55732	34916	866423	153173
North East	1060	2820	11804	87000
All India	313671	180608	1709071	727740

3.6.2.2 Employment Forecast 2017 by Function Domain

Total Employees in March 2017					
Functional Domain	Total	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels
Administration	240786	11815	10828	152996	65147
Front office	352969	26080	15063	218701	93125
F&B (service)	527512	62045	38454	299488	127525
F&B(Kitchen)	456456	63415	36995	249715	106331
House keeping	658043	50811	33311	402523	171398
Accounts	125197	14598	6702	72869	31028
EDP	22620	2346	1726	13009	5539
Security	167463	23194	12012	92759	39498
Sales & Marketing	47833	9552	3201	24604	10476
Purchase & stores	43502	5856	3776	23755	10115
Human resource	16610	4714	2084	6882	2930
Public relation	8699	1433	1084	4336	1846
Maintenance/Eng	130635	21844	9195	69852	29744
Telephone	27280	3156	1409	15931	6784
Health club/ Swimming	15672	5814	584	6504	2770
Laundry	86433	6811	4085	52978	22559
Others	3378	187	100	2168	923
Total	2931090	313671	180608	1709071	727740

3.6.2.3 Employment Forecast 2017 by Level of Operation

Total Employees by Level of Operation in March 2017		
Function Domain	Managerial	Non-managerial
Administration	133062	107724
Front office	57211	295759
F&B (service)	84402	443110
F&B(Kitchen)	50833	405623
House keeping	11447	646595
Total	336955	1898811

3.6.2.4 Employment Forecast 2017 by Level of Training

Total Employees by Level of Training : March 2017			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	162372	68727	9687
Front office	157039	158643	37287
F&B (service)	286128	198943	42440
F&B(Kitchen)	239141	164251	53064
House keeping	234296	298196	125550
Total	1078976	888760	268028

3.6.3.1 Employment Forecast 2022 by Hotel Segment

Employment Forecast – March 2022				
Region	4 Star upwards Hotels	1 – 3 Star	Unclassified Units	Motels
East	18499	4890	95911	131150
North	153104	13358	589866	226094
South	327716	220797	303729	174155
West	85880	50881	1756195	166943
North East	1779	5536	16338	94821
All India	586978	295462	2762041	793162

3.6.3.2 Employment Forecast 2022 (across Level of Training)

Total Employees by Level of Training March 2022			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	276513	71471	10103
Front office	238140	236218	54030
F&B (service)	441294	298160	62553
F&B(Kitchen)	370258	250518	77872
House keeping	357360	446363	183180
Total	1683565	1302730	387738

3.6.3.3 Employment Forecast 2022 (across Function Domain)

Total Employees in March 2022					
Functional Domain	Total	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels
Administration	358087	22110	17715	247258	71004
Front office	528388	48805	24642	353444	101497
F&B (service)	802008	116106	62908	484005	138989
F&B(Kitchen)	698648	118670	60522	403566	115890
House keeping	986903	95084	54494	650519	186806
Accounts	189863	27317	10964	117764	33818
EDP	34275	4391	2823	21024	6037
Security	256013	43404	19651	149909	43049
Sales & Marketing	74291	17874	5237	39762	11418
Purchase & stores	66552	10958	6178	38391	11025
Human resource	26545	8821	3409	11121	3194
Public relation	13474	2681	1773	7008	2012
Maintenance/Eng	201227	40878	15042	112889	32418
Telephone	41352	5906	2305	25747	7394
Health club/ Swimming	25366	10880	955	10512	3019
Laundry	129633	12745	6682	85619	24587
Others	5024	350	164	3504	1006
Total	4437643	586978	295462	2762041	793162

3.6.3.4 Employment Forecast 2022 (across Level of Operation)

Total Employees by Level of Operation in March 2022		
Function Domain	Managerial	Non-managerial
Administration	200700	157387
Front office	86781	441607
F&B (service)	128321	673686
F&B(Kitchen)	81553	617095
House keeping	17870	969033
Total	515225	2858808

3.7 Projected Annual Demand for Manpower at Entry Level

Annual Demand for Manpower at Entry Level 2011-2012				
Region	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels
East	409	380	7306	13801
North	3294	1456	64474	23792
South	3114	6517	22663	18326
West	1951	2356	46335	17567
North East	33	125	1077	9978
All India	8800	10834	141854	83464

Annual Demand for Manpower at Entry Level 2011-2012				
Functional Domain	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels
Administration	217	438	12699	7472
Front office	971	1534	18153	10681
F&B (service)	2962	2561	24858	14626
F&B(Kitchen)	1433	1722	20727	12195
House keeping	1279	2279	33410	19658
Accounts	287	350	6049	3559
EDP	28	156	1079	635
Security	510	664	7699	4530
Sales & Marketing	149	266	2042	1202
Purchase & stores	68	121	1972	1160
Human resource	104	66	571	336
Public relation	8	26	360	212
Maintenance/Eng	507	370	5798	3412
Telephone	91	105	1323	778
Health club	42	4	540	317
Laundry	135	172	4397	2587
Others	11	0	176	104
Total	8800	10834	141854	83464

Annual Demand for Manpower at Entry Level 2016-2017				
Region	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels
East	742	606	10976	15041
North	5980	2322	96861	25930
South	5653	10395	34047	19974
West	3542	3757	69610	19146
North East	60	200	1618	10875
All India	15977	17279	213112	90967

Annual Demand for Manpower at Entry Level 2016-2017				
Functional Domain	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels
Administration	393	699	19079	8144
Front office	1762	2446	27272	11641
F&B (service)	5378	4084	37345	15941
F&B(Kitchen)	2601	2747	31139	13292
House keeping	2322	3634	50193	21425
Accounts	521	558	9087	3879
EDP	50	250	1622	692
Security	926	1059	11566	4937
Sales & Marketing	270	425	3068	1310
Purchase & stores	123	192	2963	1265
Human resource	190	105	858	366
Public relation	14	42	541	231
Maintenance/Eng	921	591	8711	3718
Telephone	165	168	1987	848
Health club/Swimming	75	6	811	346
Laundry	245	274	6606	2820
Others	21	0	265	113
Total	15977	17279	213112	90967

Annual Demand for Manpower at Entry Level 2021-2022				
Region	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels
East	1388	991	17738	16394
North	11191	3799	156538	28262
South	10578	17005	55024	21769
West	6629	6146	112497	20868
North East	112	327	2614	11853
All India	29898	28267	344412	99145

Annual Demand for Manpower at Entry Level 2021-2022				
Functional Domain	4 Star upwards Hotels	1-3 Star	Unclassified Units	Motels
Administration	736	1144	30833	8876
Front office	3298	4001	44074	12687
F&B (service)	10064	6681	60353	17374
F&B(Kitchen)	4868	4494	50324	14487
House keeping	4346	5946	81118	23351
Accounts	975	913	14686	4228
EDP	94	408	2621	755
Security	1732	1733	18693	5381
Sales & Marketing	505	695	4959	1428
Purchase & stores	231	315	4788	1378
Human resource	355	171	1386	399
Public relation	26	69	874	252
Maintenance/Eng	1724	966	14078	4053
Telephone	308	274	3212	925
Health club/Swimming	141	9	1310	377
Laundry	458	449	10676	3073
Others	38	0	428	123
Total	29898	28267	344412	99145

3.9 Employee Profile in Accommodation Units

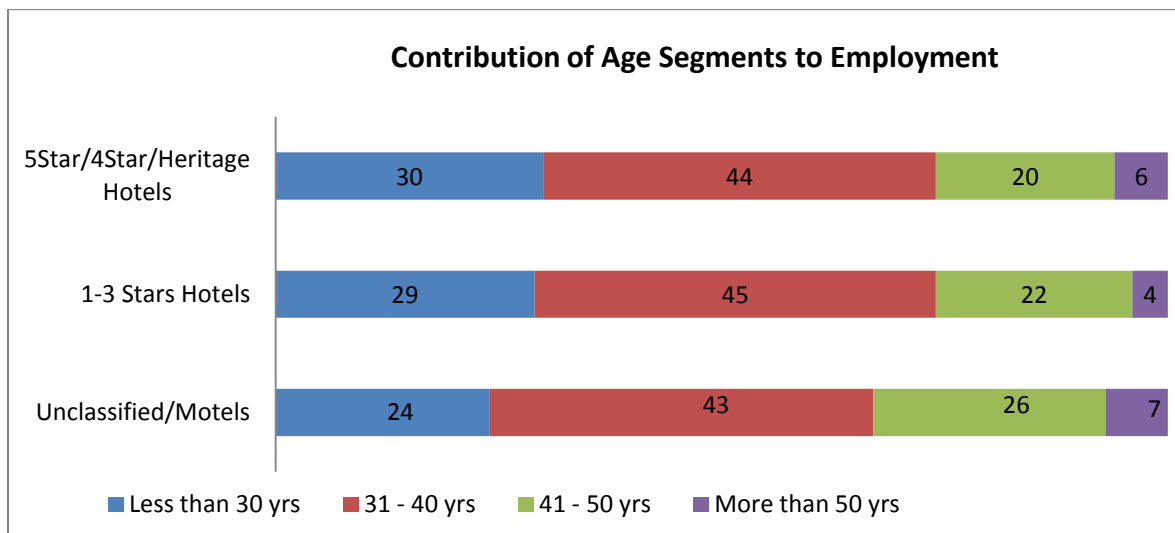
3.9.1 Hotel Administration: Employee Profile

A significant proportion of employees in the administration function are less than 30 years of age, particularly in the star category hotels. The General Managers number approx. 10% of the administration workforce, in the unclassified units, the proportion of managers is high at 50%.

With increasing seniority, the differential in salary levels across hotel categories increases rapidly. Hence, the salary of General Managers in 4 star upwards hotels is more than three times of the level prevailing in unclassified units. At the entry level, the differential is approx. 36%.

Incidence of formal training among employees is significantly higher in the larger hotels and drops at the lower levels, particularly in the smaller hotels.

Hotel Administration: Age Profile



Hotel Administration: Organization Hierarchy

% Employees at Different Tiers			
Organization Hierarchy	4 Star upwards Hotels	1 – 3 Star	Unclassified Units/Motels
General Manager	15	16	12
Manager	23	30	52
Executive	28	26	15
Assistants	26	25	15
Others	8	4	6

Hotel Administration: Current Salary Levels

Average Salary Rs.			
	4 Star upwards Hotels	1 – 3 Star	Unclassified Units/Motels
General Manager	61,587	27867	17687
Manager	25,691	16288	10321
Executive	15,359	11130	8746
Assistants	10,524	8338	7313

Hotel Administration: Incidence of Formal Training

Incidence of Formal Training (%)			
	4 Star upwards Hotels	1 – 3 star hotels	Unclassified units/Motels
General Manager	90	83	76
Manager	64	71	50
Executive	53	56	24
Assistants	63	49	21

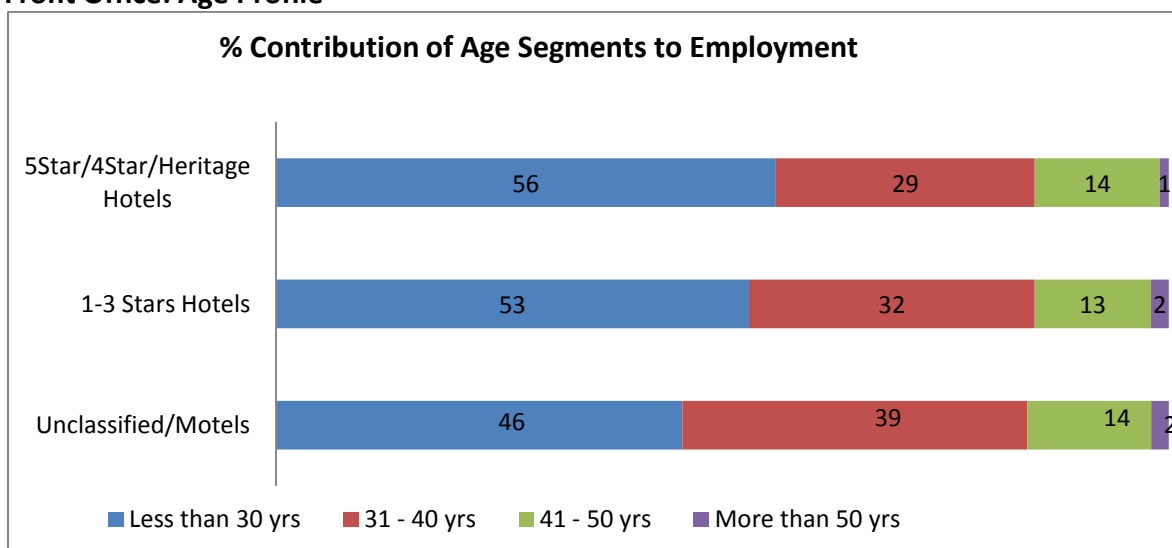
3.9.2 Front Office: Employee Profile

A large proportion of employees in the front office are less than 30 years of age, particularly in the star category hotels. Receptionists and bell boys form bulk of the workforce in this function.

Receptionists and bell boys in the smaller hotels are paid significantly lesser than their counterparts in the 4 star upward hotels.

Incidence of formal training among bell boys is significantly lower in the smaller hotels..

Front Office: Age Profile



Front Office: Organization Hierarchy

% Employees at Different Tiers			
Organization Hierarchy	4 Star upwards Hotels	1 – 3 Star	Unclassified Units/Motels
Departmental Head	6	11	1
Managers	14	10	12
Receptionists	37	53	59
Bell Boys	36	23	21
Others	7	2	7

Front Office: Current Salary Levels

Average Salary Rs.			
Organization Hierarchy	4 Star upwards Hotels	1 – 3 Star	Unclassified Units/Motels
Departmental Head	48,717	17,855	17,813
Managers	41,984	14,422	11,053
Receptionists	17,996	7,928	6,276
Bell Boys	7,060	4,756	3,589

Front Office: Incidence of Formal Training

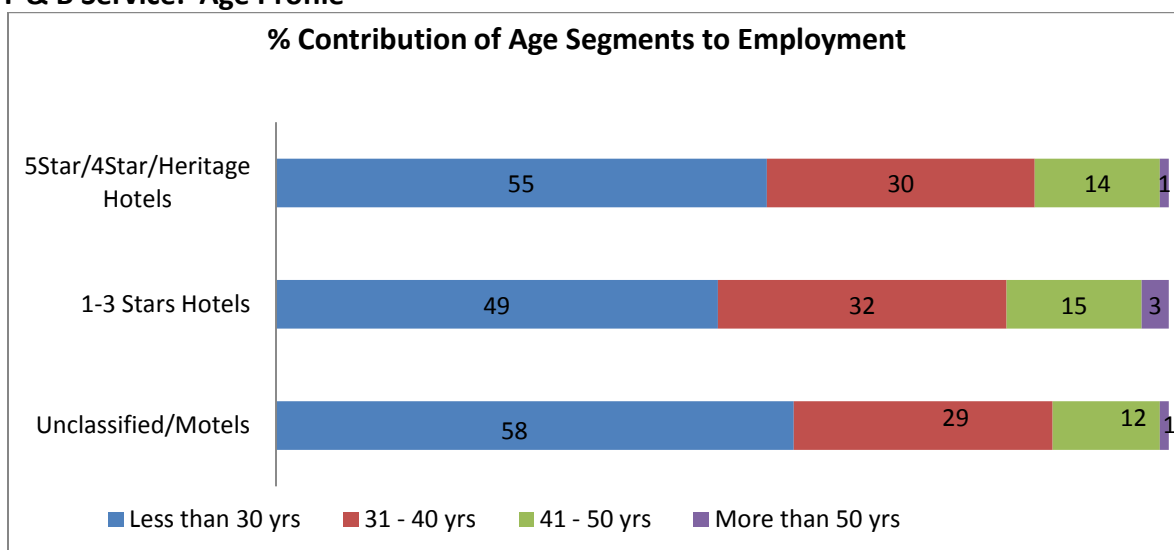
Incidence of Formal Training (%)			
	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Departmental Head	85	83	64
Managers	77	74	46
Receptionists	61	52	41
Bell Boys	46	25	18

3.9.3 F & B Service: Employee Profile

A majority of the employees in F & B Service are less than 30 years of age, particularly in the unclassified accommodation units. Almost half of the employees in this function are stewards.

The salary levels among Directors and F & B Service Managers is significantly higher as is the incidence of formal training across hotel categories.

F & B Service: Age Profile



F & B Service: Organization Hierarchy

% Employees at Different Tiers in F&B Service			
Organization Hierarchy	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Director	0.4	01	0.3
F&B Managers	04	06	11
Restaurant Managers	04	04	02
Banquet Manager	03	03	01
Bar Manager	03	03	01
Captains	24	23	13
Stewards	50	55	50
Others	12	05	21

Study to Assess the Requirement of Manpower in Hospitality and Travel Trade Sector

F & B Service: Current Salary Levels

Average Salary Rs.			
	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Director	108333	28200	26143
F&B Managers	54941	15912	10086
Restaurant Managers	26974	14239	14226
Banquet Manager	32625	14175	14462
Bar Manager	15907	10627	14089
Captains	11777	8075	6451
Stewards	7879	5527	4470

F & B Service: Incidence of Formal Training

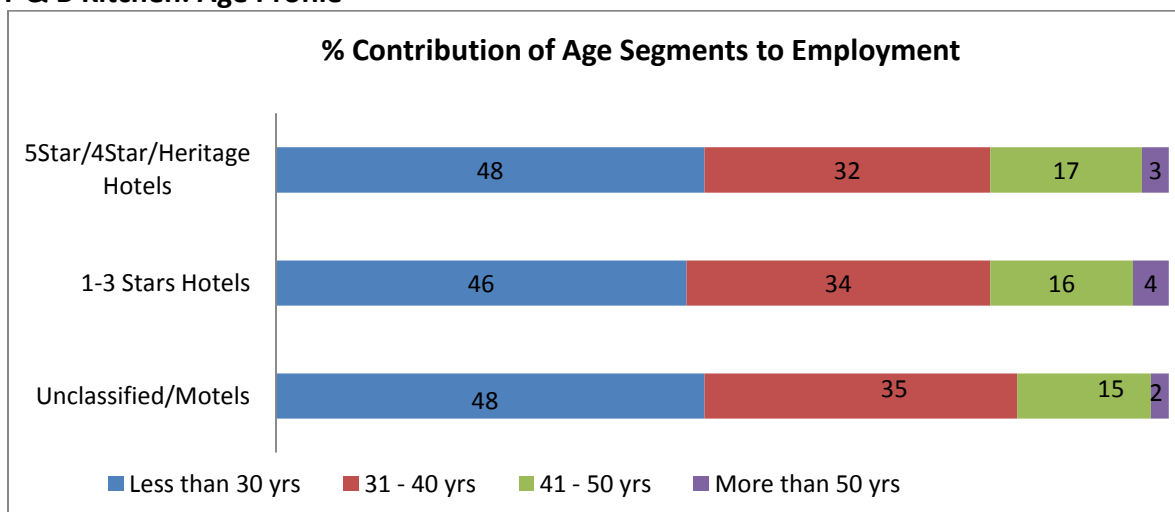
Incidence of Formal Training (%)			
	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Director	89	81	78
F&B Managers	90	91	61
Restaurant Managers	84	85	58
Banquet Manager	84	79	60
Bar Manager	86	82	50
Captains	68	70	47
Stewards	61	52	33

3.9.4 F & B Kitchen: Employee Profile

Almost half the employees in F & B Kitchen are less than 30 years of age, particularly in the unclassified accommodation units. A large proportion of them are cooks/ helpers.

The salary levels of the Executive Chefs is substantially higher than the others. Average salary levels at the other levels is Rs. 10,000 or lesser. However, the incidence of formal training at the lower levels is also high, as compared to some other functions.

F & B Kitchen: Age Profile



F & B Kitchen: Organization Hierarchy

% Employees at Different Tiers in F&B Kitchen			
Organization Hierarchy	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Executive chefs	03	06	03
Demi chefs	08	05	01
Sous chefs	08	05	02
Commis chefs 1	08	07	04
Commis chefs 2	14	08	04
Commis chefs 3	07	06	05
Trainee chefs	09	10	06
Cooks	10	15	32
Helpers	32	33	34

F & B Kitchen: Current Salary Levels

Average Salary Rs.			
	4 Star upwards Hotels	1 – 3 Star	Unclassified Units/Motels
Executive chefs	56409	18087	21218
Demi chefs	19593	12530	17583
Sous chefs	28241	11243	14227
Commis chefs 1	11436	9745	9121
Commis chefs 2	9541	8429	7262
Commis chefs 3	8815	7930	8397
Trainee chefs	8168	6517	5092
Cooks	7980	7472	6240
Helpers	6270	4597	3722

F & B Kitchen: Type of Training

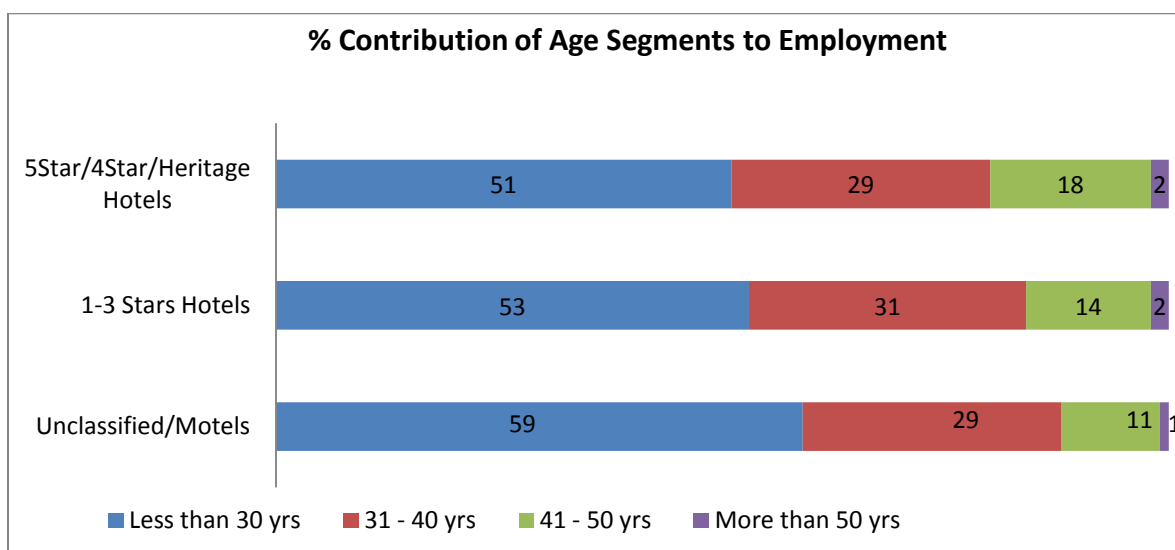
% Incidence of Formal Training			
	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Executive chefs	94	88	78
Demi chefs	70	86	93
Sous chefs	68	81	75
Commis chefs 1	75	79	65
Commis chefs 2	69	77	70
Commis chefs 3	82	83	87
Trainee chefs	51	47	26
Cooks	56	65	49
Helpers	44	30	25

3.9.5 Housekeeping: Employee Profile

A majority of the employees in Housekeeping are less than 30 years of age, particularly in the unclassified accommodation units. A large proportion of them are room attendants/ house-men.

The salary levels till the level of Housekeeping Executives is low. However, the incidence of formal training among the room attendants and house-men is significantly lower.

Housekeeping: Age Profile



Housekeeping: Organization Hierarchy

% Employees at Different Tiers in Housekeeping			
Organization Hierarchy	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Managers	03	03	01
Housekeeping Executives	06	04	03
Housekeeping In-charge	06	05	04
Floor supervisors	13	12	06
Room Attendants	41	46	55
House-men	27	28	24
Others	05	03	07

Housekeeping: Current Salary Levels

Average Salary Rs.			
	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Managers	53660	14975	17500
Housekeeping Executives	21580	11375	9390
Housekeeping In-charge	11558	9690	7604
Floor supervisors	9664	7695	5949
Room Attendants	6828	5260	4067
House-men	5620	4313	3123

Housekeeping: Formal Training

% Incidence of Formal Training			
	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Managers	87	89	56
Housekeeping Executives	70	75	70
Housekeeping In-charge	64	66	39
Floor supervisors	56	61	48
Room Attendants	41	34	25
House-men	44	31	19

3.10 Selection Process of Hotel Employees

3.10.1 Selection Process of Hotel Employees in 5 & 4 Star

Selection process -4 Star upwards Hotels (%)				
Functional Domain	Interview	Written test	Practical test	Other
Administration	99	19	07	03
Front Office	99	11	08	04
F&B (Service)	93	10	43	00
F&B (Kitchen)	86	08	88	01
House Keeping	97	04	34	00

3.10.2 Selection Process of Hotel Employees in 1-3 Star

Selection process -1-3 Star (%)				
Functional Domain	Interview	Written test	Practical test	Other
Administration	97	09	10	01
Front Office	96	05	12	03
F&B (Service)	94	03	43	03
F&B (Kitchen)	85	02	80	03
House Keeping	95	01	32	03

3.10.3 Selection Process of Hotel Employees in Unclassified/Motel Units

Selection process –Unclassified/Motels (%)				
Functional Domain	Interview	Written test	Practical test	Other
Administration	92	02	06	07
Front Office	91	01	09	09
F&B (Service)	91	02	28	05
F&B (Kitchen)	85	02	60	05
House Keeping	85	01	19	12

3.11 Method of Hiring Hotel Employees

3.11.1 Method for Hiring of Hotel Employees in 4 Star upwards Hotels

Method of Hiring (%)				
Functional Domain	Campus recruitment	Advertisement	Placement consultants	Other
Administration	53	71	53	54
Front Office	49	68	48	56
F&B (Service)	43	66	56	59
F&B (Kitchen)	37	60	53	73
House Keeping	29	63	49	71

3.11.2 Method for Hiring of Hotel Employees in 1 - 3 Star Hotels

Method of Hiring (%)				
Functional Domain	Campus recruitment	Advertisement	Placement consultants	Other
Administration	12	80	35	47
Front Office	13	76	37	54
F&B (Service)	12	74	38	55
F&B (Kitchen)	12	73	38	57
House Keeping	8	73	37	61

3.11.3 Method for Hiring of Hotel Employees in Unclassified/Motel Units

Method of Hiring (%)				
Functional Domain	Campus recruitment	Advertisement	Placement consultants	Other
Administration	5	64	23	69
Front Office	5	65	23	72
F&B (Service)	6	74	22	71
F&B (Kitchen)	5	72	23	69
House Keeping	4	58	20	77

3.12 Required Qualification for Different Departments & Functions

3.12.1 Required Qualifications in Administration

Qualification			
Type of Manpower	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
General Manager	MBA BHM/ BBA	MBA/ BHM/ BBA	Graduation/ Diploma Hotel Management
Managers	PG/ Graduation	MBA BHM/ DHM	Graduation
Executives	BHM/DHM	BHM/ DHM BBA	Diploma in Hotel Management
Assistants	BHM/DHM Fresh Graduates	Graduates	Undergraduate

3.12.2 Required Qualification in Front Office

Qualification			
Type of Manpower	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Department Head	Graduation	Graduate, Undergraduate	Hotel Management Experience
Managers	BHM/ DHM	DHM	Diploma in Hotel Management
Receptionists	Graduation/Diploma in Hotel Management	Graduation	Graduate/undergraduate
Bell Boys	Undergraduate	Undergraduate	Undergraduate

3.12.3 Required Qualification in F&B Kitchen

Qualification			
Type of Manpower	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Executive Chefs	Hotel Management, Diploma in Catering	Hotel Management, Diploma in Catering	--
Demi Chefs	Graduation in Hotel Management	Diploma in Catering	Diploma in Hotel Management
Sous Chefs	Diploma in Catering	Diploma in Catering	--
Commis Chefs	Diploma in Foods & Crafts	Diploma in Foods & Crafts	--
Cooks	Hotel Management	Diploma in Catering	Experience
Helpers	Diploma	Undergraduates	Undergraduates

3.12.4 Required Qualification in F & B Service

Qualification			
Type of Manpower	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Director	BHM	Diploma in Hotel Management	Diploma in Catering
F & B Managers	Graduation/ F&B Diploma	Diploma in Hotel Management	Diploma in Hotel Management
Restaurants Managers	BHM	Diploma in Hotel Management	Graduates/ Undergraduates
Banquet Manager	BHM	Graduates	Graduates/ Undergraduates
Bar Manager	BHM	BHM/DHM	Graduates/ Undergraduates
Captains	BHM	Diploma in Hotel Management & Catering	--
Stewards	Diploma in Hotel Management	Undergraduates	--

Study to Assess the Requirement of Manpower in Hospitality and Travel Trade Sector

3.12.5 Required Qualification in House Keeping

Qualification			
Type of Manpower	4 Star upwards Hotels	1-3 Star	Unclassified Units/Motels
Managers	Diploma in Hotel Management	BHM	Diploma in Hotel Management
Executives	BHM, Diploma	Diploma	Graduates
In-charge	Graduation	Graduation/ Diploma	Undergraduates
Floor Supervisors	Diploma	Diploma	Undergraduates
Room Attendants	Diploma in Hotel Management	Under Graduates	Undergraduates
House-men	Under Graduate	Under Graduates	Undergraduates

CHAPTER 4

EMPLOYMENT IN EATING OUTLETS IN INDIA

4.1 Snapshot of Employment in Eating Outlets

	East	North	South	West	N East	All India
Number of eating outlets in 2010	11213	29297	24092	38651	552	103806
Employment Intensity per 100 chairs	18	38	37	31	22	31
Total employment in eating outlets in 2010	69415	551585	507155	738252	3893	1870299
Annual demand for manpower at entry level	11928	28128	55761	166069	634	262520
Supply (students who passed out in 2009-2010)	--	--	--	--	--	5012
Growth in Eating outlets (%)	2.4	2.5	1.6	2.5	2.7	2.2

- Growth forecast in eating outlets is based on population growth registered in the period 1991-2001.
- Employment intensity has been computed on the basis of Market Pulse survey in different segments.

4.2 Eating Outlets in India

4.2.1 Eating outlets in India

There are just over 1 lakh eating outlets, with seating capacity of more than 10. The Western region has the maximum followed by the North.

Number of Total Eating outlets in March 2010	
Region	Eating outlets
East	11214
North	29297
South	24092
West	38651
North East	552
All India	103806

4.2.2 Profile of Eating Outlets

Fast food restaurants have emerged in all the regions except for the South while multi-cuisine restaurants are the most popular across all regions.

% of Restaurants					
Type of Eating outlets	East	North	South	West	North east
Oriental	5	3	2	2	0
Mughlai	15	15	1	8	6
Fast Food	28	41	7	37	29
Multi cuisine	34	28	26	29	24
South Indian	6	25	56	21	6
Specialty	3	35	4	5	0
Other	28	36	11	18	41

4.2.3 Seating Capacity in India

The restaurants in India can seat more than 5.6 million people. Again, West India has the maximum seating capacity.

Seating Capacity in March 2010	
Region	Seating capacity
East	395133
North	1448970
South	1374930
West	2377791
North East	17574
All India	5614397

4.3 Employment Pattern

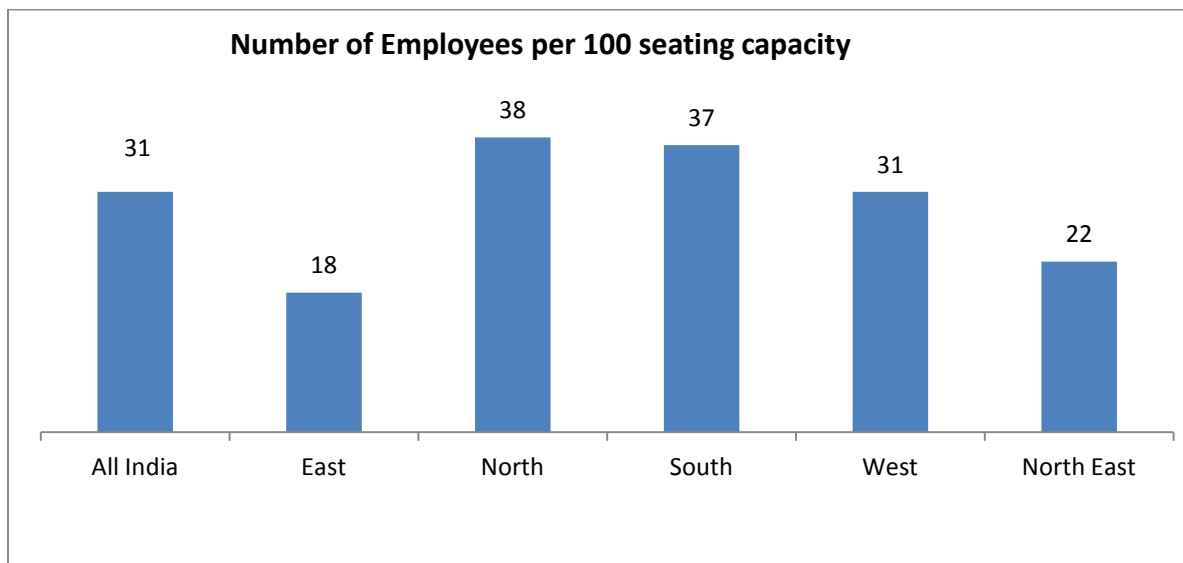
4.3.1 Employment in Eating Outlets

Restaurants in urban India employ more than 1.87 million people, with the maximum in the Western region, followed by North and South.

Total Employees in March 2010	
Region	Total Employees
East	69415
North	551585
South	507155
West	738252
North East	3893
All India	1870299

4.3.2 Number of Employees per 100 Seating capacity

On an average, the restaurants employ 31 people for every 100 chairs. This is significantly lower in East and North East.



4.3.3.1 Employment Pattern (across Functional Domains)

F&B service closely followed by the kitchen account for close to 70% of all employees working in restaurants. Restaurant administration is the third largest employer by function, but significantly lower than F&B.

Total Employees in March 2010							
Functional Domain	All India	East	North	South	West	North East	% in Functional Domains
Administration	173,014	8,356	53,922	40,269	69,746	721	9
F&B (Kitchen)	632,696	26,194	195,663	162,604	246,745	1,490	34
F&B (Service)	668,941	25,565	156,806	189,596	295,676	1,298	36
Store	59,675	1,886	14,940	21,309	21,492	48	3
Security	57,294	1,953	20,150	16,829	18,362	0	3
Maintenance	93,739	1,572	24,481	42,563	24,883	240	5
Delivery	81,386	1,837	29,315	13,277	36,933	24	4
Accounts	65,128	2,052	23,728	20,653	18,623	72	3
Others	38,424	0	32,579	55	5,790	0	2
Total	1870299	69415	551585	507155	738252	3893	100

4.3.3.2 Employment in Key Functions (across Level of Operation)

Total Employees in March 2010		
Functional Domain	Managerial	Non-managerial
Administration	112459	60555
F&B (Kitchen)	94905	537791
F&B(Service)	6689	662252
Store	1790	57885
Total	215843	1318483

4.3.3.3 Employment in Key Functions (across Level of Training)

Total Employees in March 2010			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	82001	74279	16734
F&B (Kitchen)	223345	283964	125387
F&B(Service)	203086	321737	144118
Store	21315	29534	8826
Total	529748	709514	295064

4.3.4 Proportion of Temporary Employees

Approximately 21% of the employees in restaurants are temporary. This is noticeably higher in the East but lower in North and North East.

% Employees who are Temporary						
Functional Domain	All India	East	North	South	West	North East
Administration	4	4	1	9	3	0
F&B (Kitchen)	22	48	6	18	26	8
F&B (Service)	24	47	7	21	27	19
Store	14	31	6	15	13	50
Security	37	50	48	28	30	0
Maintenance	27	33	42	10	43	30
Delivery	24	37	2	8	42	0
Accounts	16	24	19	6	21	0
Others	0	0	0	0	0	0
Total	21	41	9	17	25	12

4.3.5 Employee Turnover

Employee turnover refers to the % of workforce that leaves the restaurants for jobs in other restaurants, retires or leaves the sector. The rate of employee turnover in restaurants was at 16% in 2009 – 10. This is noticeably high across all regions.

% Employee Turnover						
Functional Domain	All India	East	North	South	West	North East
Administration	13	8	7	17	16	--
F&B (Kitchen)	18	25	12	14	23	13
F&B (Service)	18	21	15	13	21	4
Store	11	15	2	7	17	--
Security	12	10	2	18	16	--
Maintenance	7	8	4	7	10	--
Delivery	10	14	2	7	16	--
Accounts	9	15	2	7	15	--
Others	14	--	11	--	30	--
Total	16	20	10	12	20	6

4.4 Recruitment Pattern

4.4.1 Annual Demand for Manpower at Entry Level (Number Recruited by Region)

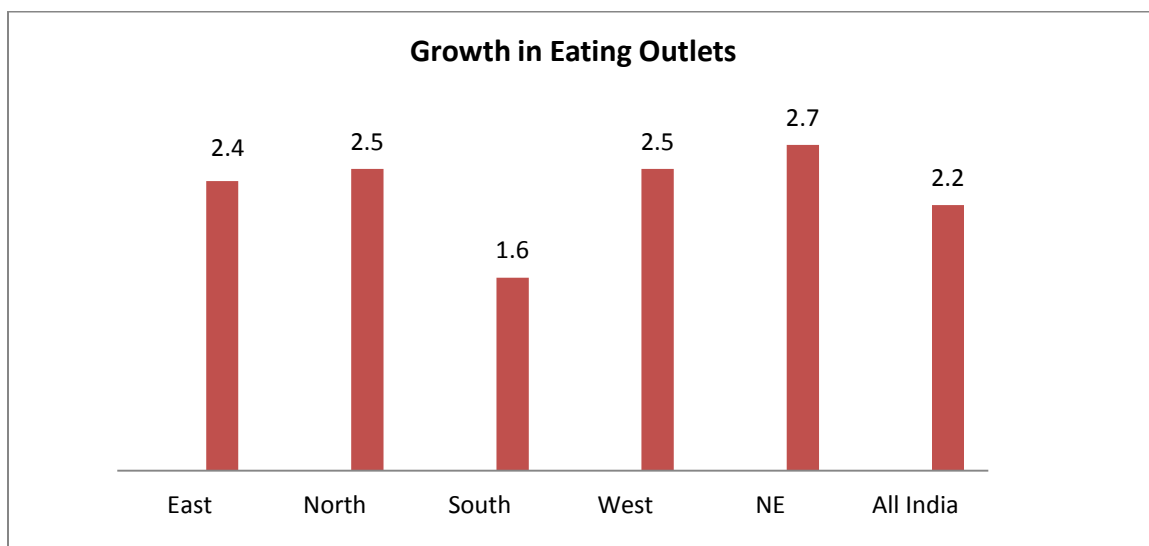
Annual demand for manpower at the entry level touched 262,520 in 2009 – 10, with the western region accounting for almost 63% of this demand.

Annual Demand for Manpower at Entry Level (April 2009 - April 2010)						
Function Domain	All India	East	North	South	West	North East
Administration	8642	416	993	3246	3987	--
F&B (Kitchen)	99312	5012	9653	21098	63342	207
F&B (Service)	125220	5907	10811	22518	85637	347
Store	6004	229	165	1623	3987	--
Security	8295	69	993	3246	3987	--
Maintenance	2618	61	993	973	591	--
Delivery	5939	114	1908	2536	1381	--
Accounts	3791	120	190	521	2880	80
Others	2699	--	2422	--	277	--
Total	262520	11928	28128	55761	166069	634

4.5 Forecast (2012 – 2022)

4.5.1 Growth

Growth in eating outlets is based on population growth and has been computed for each region.

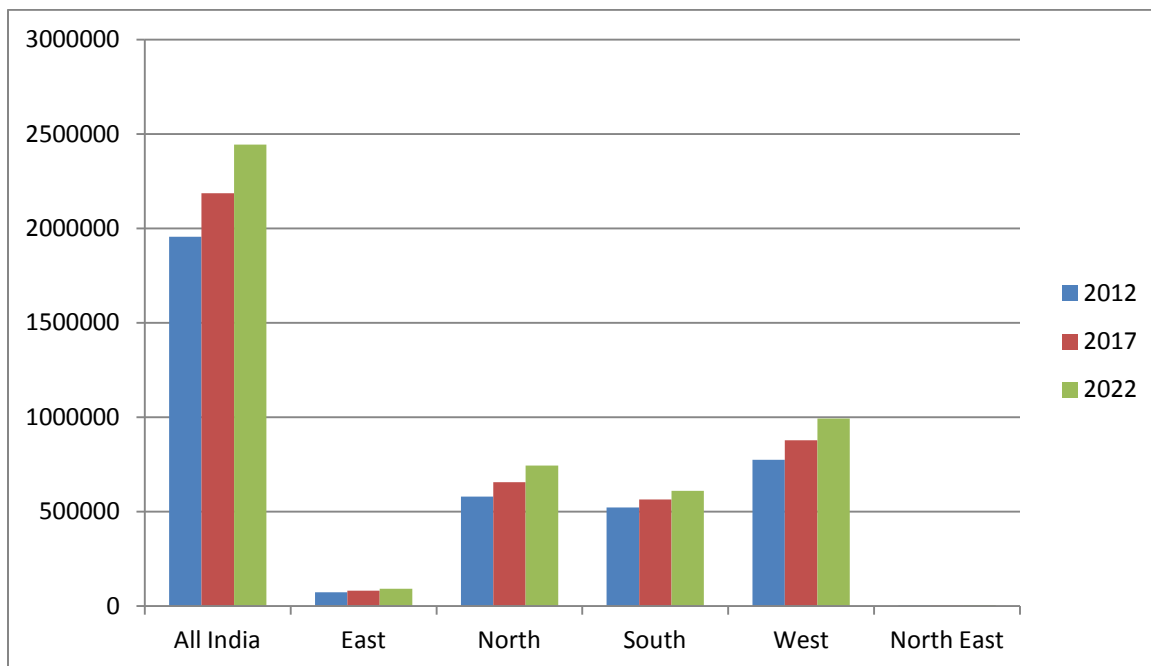


4.5.2 Eating outlets forecast (2012 – 2022)

Region	2012	2017	2022
East	11765	13264	14954
North	30792	34873	39495
South	24845	26832	28977
West	40605	45935	51964
North East	583	667	763
All India	108591	121571	136153

4.6 Employment Forecast (2012 – 2022)

4.6.1 Forecast of Employees in Eating Outlets (2012)



Region	2012	2017	2022
East	72826	82106	92569
North	579738	656570	743585
South	523002	564817	609977
West	775584	877384	992546
North East	4108	4700	5378
All India	1955258	2185578	2444055

4.6.2.1 Employment Forecast 2012 (across Level of Operation)

Total Employees in March 2012						
Departments	All India	East	North	South	West	North East
Administration	181,002	8,767	56,674	41,527	73,273	761
F&B (Kitchen)	661,610	27,481	205,650	167,685	259,222	1,572
F&B (Service)	699,148	26,821	164,810	195,520	310,628	1,369
Store	62,286	1,979	15,702	21,975	22,579	51
Security	59,873	2,049	21,179	17,354	19,291	0
Maintenance	97,668	1,649	25,731	43,893	26,141	254
Delivery	85,256	1,927	30,811	13,692	38,801	25
Accounts	68,032	2,153	24,939	21,299	19,565	76
Others	40,381	0	34,242	56	6,083	0
Total	1,955,258	72,826	579,738	523,002	775,584	4,108

4.6.2.2 Employment Forecast 2012 (across Level of Operation)

Total Employees March 2012		
Function Domain	Managerial	Non-managerial
Administration	117651	63351
F&B (Kitchen)	99242	562368
F&B(Service)	6992	692156
Store	1869	60417
Total	225754	1378292

4.6.2.3 Employment Forecast 2012 (across Level of Training)

Total Employees March 2012			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	85786	77708	17508
F&B (Kitchen)	233552	296941	131117
F&B(Service)	212257	336265	150625
Store	22248	30827	9211
Total	553844	741742	308460

4.6.3.1 Employment Forecast 2017 (across Function Domain)

Total Employees in March 2017						
Departments	All India	East	North	South	West	North East
Administration	202,676	9,884	64,185	44,847	82,890	870
F&B (Kitchen)	740,025	30,983	232,904	181,092	293,247	1,799
F&B (Service)	781,010	30,239	186,652	211,152	351,400	1,567
Store	69,348	2,231	17,784	23,732	25,543	58
Security	66,860	2,310	23,985	18,742	21,823	0
Maintenance	108,266	1,859	29,141	47,403	29,573	290
Delivery	95,778	2,173	34,895	14,787	43,894	29
Accounts	75,893	2,427	28,244	23,002	22,133	87
Others	45,723	0	38,780	61	6,882	0
Total	2,185,578	82,106	656,570	564,817	877,384	4,700

4.6.3.2 Employment Forecast 2017 (across Level of Operation)

Total Employees March 2017		
Function Domain	Managerial	Non-managerial
Administration	131739	70937
F&B (Kitchen)	111004	629021
F&B(Service)	7810	773200
Store	2080	67268
Total	252634	1540425

4.6.3.3 Employment Forecast 2017 (across Level of Training)

Total Employees in March 2017			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	96059	87014	19603
F&B (Kitchen)	261233	332135	146657
F&B(Service)	237110	375638	168262
Store	24771	34322	10256
Total	619172	829109	344778

4.6.4.1 Employment Forecast 2022 (across Function Domain)

Total Employees in March 2022						
Function Domain	All India	East	North	South	West	North East
Administration	227,034	11,144	72,691	48,433	93,770	996
F&B (Kitchen)	828,068	34,931	263,771	195,571	331,737	2,058
F&B (Service)	872,833	34,093	211,389	228,035	397,523	1,793
Store	77,246	2,516	20,140	25,629	28,895	66
Security	74,696	2,604	27,164	20,241	24,687	0
Maintenance	120,078	2,096	33,003	51,193	33,454	332
Delivery	107,625	2,449	39,519	15,969	49,655	33
Accounts	84,703	2,736	31,988	24,841	25,038	100
Others	51,771	0	43,920	66	7,785	0
Total	2,444,055	92,569	743,585	609,977	992,546	5,378

4.6.4.2 Employment Forecast 2022 (across Level of Operation)

Total Employees March 2022		
Function Domain	Managerial	Non-managerial
Administration	147572	79462
F&B (Kitchen)	124210	703858
F&B(Service)	8728	864105
Store	2317	74929
Total	282827	1722354

4.6.4.3 Employment Forecast 2022 (across Level of Training)

Total Employees in March 2022			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	107603	97472	21959
F&B (Kitchen)	292313	371650	164105
F&B(Service)	264988	419801	188044
Store	27592	38230	11424
Total	692495	927153	385533

4.7 Annual Demand for Manpower at Entry Level

4.7.1 Annual Demand for Manpower at Entry Level (2012)

Annual Demand for Manpower at Entry Level 2011-2012						
Departments	All India	East	North	South	West	N East
Administration	9016	436	1044	3347	4189	0
F&B (Kitchen)	103924	5258	10146	21757	66545	218
F&B (Service)	131115	6197	11363	23221	89968	366
Store	6276	240	173	1674	4189	0
Others	24384	382	6838	7503	9577	84
Total	274717	12514	29564	57503	174467	669

4.7.2 Annual Demand for Manpower at Entry Level (2017)

Annual Demand for Manpower at Entry Level 2016-2017						
Departments	All India	East	North	South	West	N East
Administration	10027	492	1182	3615	4738	0
F&B (Kitchen)	116445	5928	11490	23497	75280	250
F&B (Service)	147129	6987	12869	25078	101776	419
Store	7013	271	196	1808	4738	0
Others	27209	431	7744	8103	10834	97
Total	307824	14109	33482	62101	197367	766

4.7.3 Annual Demand for Manpower at Entry Level (2022)

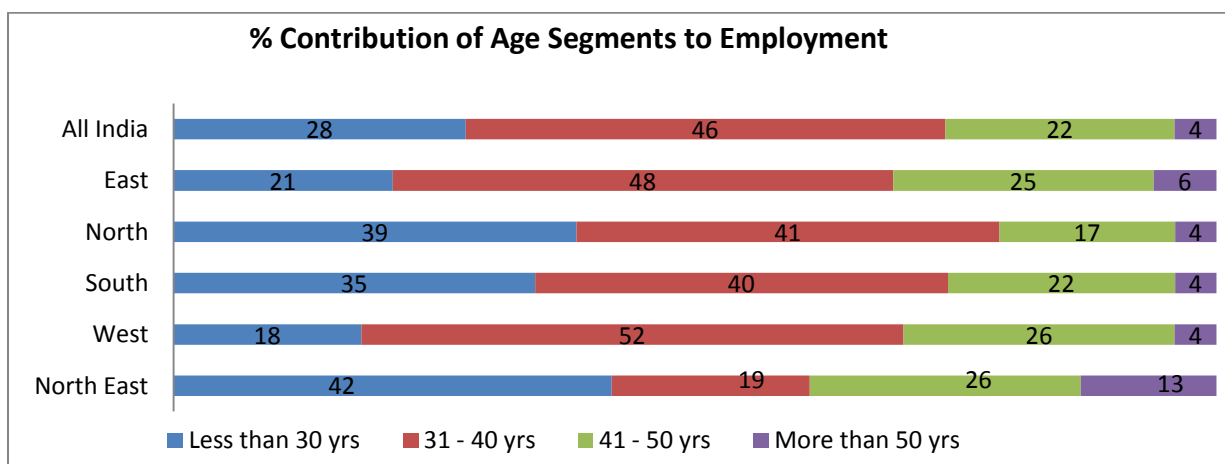
Annual Demand for Manpower at Entry Level 2021-2022						
Departments	All India	East	North	South	West	N East
Administration	11158	555	1339	3904	5360	0
F&B (Kitchen)	130518	6684	13013	25375	85160	286
F&B (Service)	165148	7877	14574	27083	115135	479
Store	7839	305	222	1952	5360	0
Others	30374	485	8771	8751	12256	111
Total	345040	15907	37919	67066	223272	876

4.8 Profile of Employees in Eating Outlets

4.8.1 Administration: Employee Profile

The employees in the administration function are largely 31 – 40 years old, except in the North East. A majority of the administration employees are managers, with a salary of more than Rs. 11,000 and have had formal training for their jobs.

Administration: Age Profile



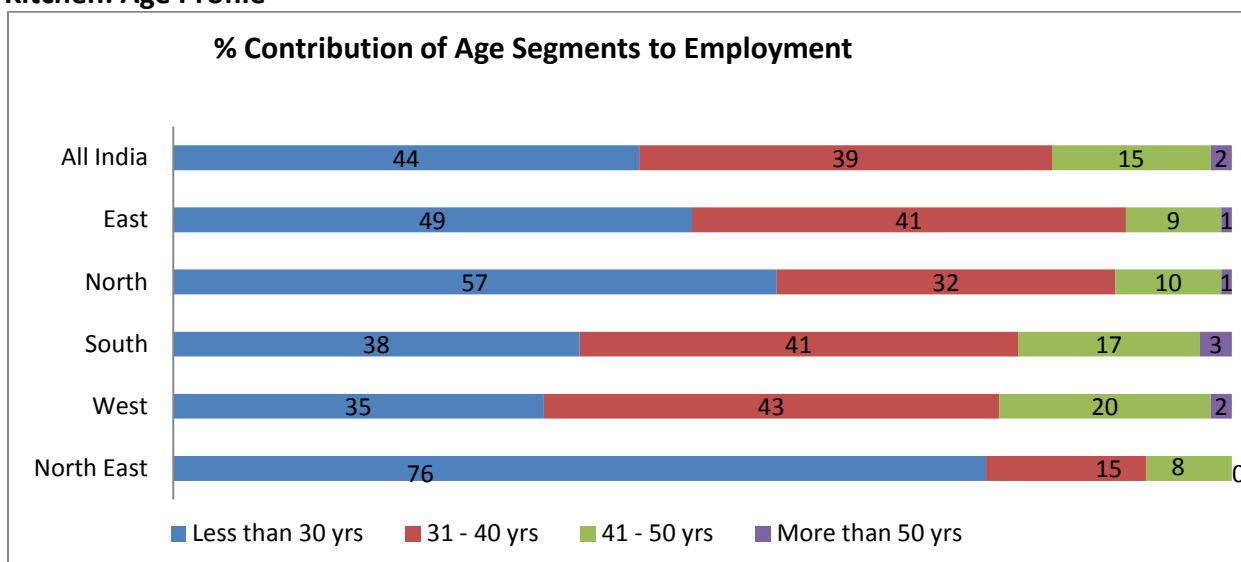
Administration: Organization Hierarchy & Salary

Organization Hierarchy	% Employees at Different Tiers	Average Salary Rs.	Incidence of Formal Training (%)
General Manager	14	15,396	75
Manager	51	11,743	51
Executive	15	9,577	28
Assistants	18	7,326	32
Others	1	5,900	69

4.8.2 Kitchen: Employee Profile

The employees in the administration function are largely less than 40 years old. A majority of the kitchen employees are cooks/ helpers, with a salary of less than Rs. 7,000 and have had formal training for their jobs. The chefs were reported to have a salary of almost Rs. 10,000 while 58% of them had received formal training.

Kitchen: Age Profile



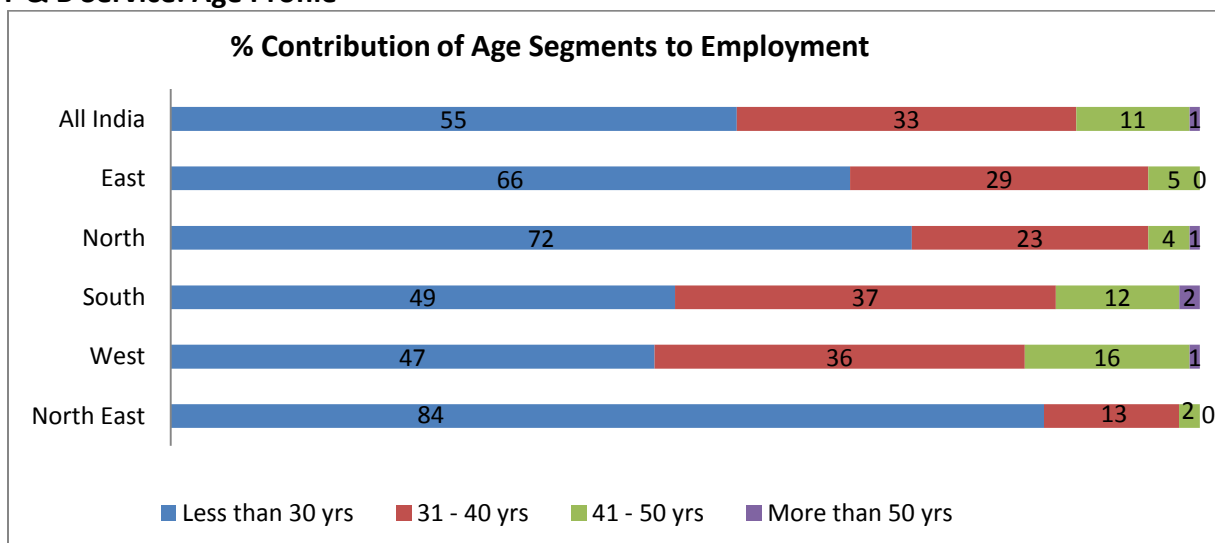
Kitchen: Organization Hierarchy & Salary

Organization Hierarchy	% Employees at Different Tiers	Average Salary Rs.	Incidence of Formal Training (%)
Chefs	9	9,972	58
Supervisors	5	9,383	43
Cooks	48	6,638	40
Helpers	36	3,861	22
Others	2	4,091	22

4.8.3 F & B Service: Employee Profile

The employees in F&B Service function are largely less than 30 years old, especially in the North and North East. A majority of the F&B service employees are waiters/ helpers, with an average salary of less than Rs. 5,000. Only the captains, hall in-charge and managers were reported to have had formal training.

F & B Service: Age Profile



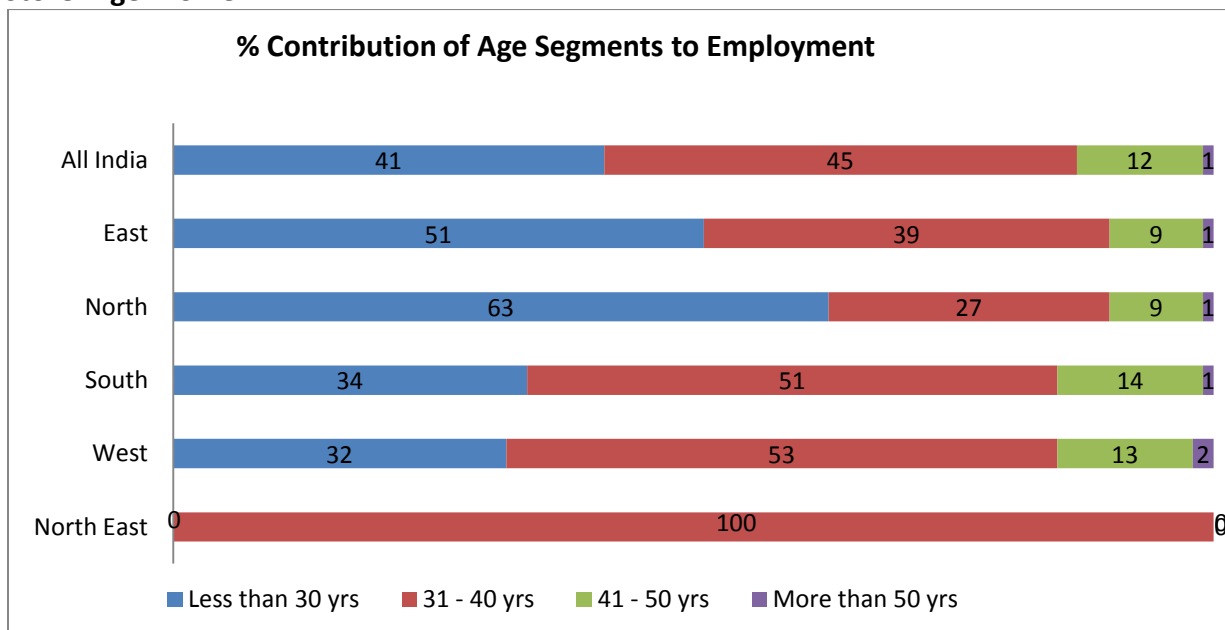
F & B Service: Organization Hierarchy & Salary

Organization Hierarchy	% Employees at Different Tiers	Average Salary Rs.	Incidence of Formal Training (%)
Managers	1	11425	60
Hall in charge	5	7209	55
Captains	7	7197	59
Stewards	9	5840	36
Waiters	53	4342	32
Helpers	24	3356	16
Others	1	4431	34

4.8.4 Store: Employee Profile

The employees in the administration function are largely less than 41 years old. A majority of them are store-keepers, with a salary of less than Rs. 6,000. Only the managers were reported to have had formal training.

Store: Age Profile



Store: Organization Hierarchy & Salary

Organization Hierarchy	% Employees at Different Tiers	Average Salary Rs.	Incidence of Formal Training (%)
Store Manager	3	10,841	66
Store Keepers	73	5,887	39
Helpers	23	4,061	20
Others	1	3,000	33

4.9 Selection Process of Eating outlets Employees

Interviews are conducted to hire most employees while recruitment for the kitchen also requires a practical test.

4.9.1 Selection Process of Eating outlets Employees in All India

Selection process –All India (%)				
Function Domain	Interview	Written test	Practical test	Other
Administration	80	9	14	7
F&B (Service)	82	2	38	9
F&B (Kitchen)	74	2	71	8
Store	88	4	13	8

4.10 Method for Hiring Eating Outlets Employees

Press advertisements are used to hire people by restaurants.

Method for Hiring - All India (%)				
Function Domain	Campus recruitment	Advertisement	Placement consultants	Other
Administration	13	60	16	62
F&B (Service)	14	51	15	65
F&B (Kitchen)	11	47	17	64
Store	9	59	18	61

4.11 Required Qualification for Different Departments & Functions

4.11.1 Required Qualification in Administration

Qualification	
General Manager	Degree/diploma in Hotel Management or Any Degree
Managers	Diploma in Hotel Management
Executives	Graduation
Assistants	Undergraduate

4.11.2 Required Qualification in F & B Service

Qualification	
Manager	Diploma in Hotel management or Catering service
Hall In-charge	Graduation or diploma in catering service
Captains	Diploma in catering service
Waiters	Graduates/ undergraduates
Helpers	Undergraduates

4.11.3 Required Qualification in F&B Kitchen

Qualification	
Chefs	Diploma in Hotel Management or Catering
Supervisors	Graduates/ undergraduates
Cooks	Diploma in Catering
Helpers	Undergraduates

4.11.4 Required Qualification in Stores

Qualification	
Managers	Diploma in Catering & Computer Knowledge
Store Keeper	Undergraduates
Helper	Undergraduates

CHAPTER 5

NON-MEDICAL EMPLOYMENT IN MEDICAL WELLNESS UNITS IN INDIA

5.1 Snapshot of Employment of Non-Medical Staff

	All India
Number of Medical & Wellness Units in 2010	1258
Growth (%)	20%
Total Employment	67932
Employment Intensity	54
Annual Demand for Manpower in 2010	6263

- 20% Annual growth has been projected by FICCI E&Y report 2009.

5.2.1 Medical & Wellness Units in India

There are more than 1250 medical & wellness units in India. These comprise hospitals, specialized centres and spa centres. The research did not encounter any such units in the North East while Northern India reported the largest number.

Number of Total Medical & Wellness Units in March 2010	
Region	Medical & Wellness Units
East	50
North	449
South	345
West	414
North East	--
All India	1258

5.3 Employment Pattern

There are almost 68000 non-medical staff employed at these medical and wellness centres.

5.3.1 Employment in Medical & Wellness Units

Total Employees in March 2010	
Region	Total Employees
East	2700
North	24246
South	18630
West	22356
North East	--
All India	67932

5.3.2 Employment Pattern (across Functional Domains)

Housekeeping employs the maximum number of non-medical staff in these entities. This is followed by the F & B functions.

Total Employees in 2010 in March 2010		
Function Domain	# Employees	% in Functional Domains
Administration	7647	11
Facilitation Cell	3509	5
Front Office	4923	7
F&B (Kitchen)	4714	7
F&B (Service)	7176	11
House Keeping	13513	20
Accounts & Billing	4033	6
EDP	1257	2
Security	4714	7
Sales & Marketing	3090	5
Purchase	2409	4
Human Resource	1362	2
Public Relation	1362	2
Maintenance	2933	4
Telephone	3404	5
Laundry	1886	3
Total	67932	100

5.3.3 Employment Pattern (across Level of Operation)

Total Employees in March 2010		
Function Domain	Managerial	Non-managerial
Administration	2982	4665
Front office	886	4037
F&B (Kitchen)	990	3724
F&B(Service)	718	6458
House keeping	2162	11351
Total	7738	30235

5.3.4 Employment Pattern (across Level of Training)

Total Employees in March 2010			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	5031	2616	0
Front office	2314	2413	197
F&B (Kitchen)	3025	1689	0
F&B(Service)	3320	3442	415
House keeping	8034	3918	1561
Total	21724	14078	2173

5.3.5 Proportion of Temporary Employees

While the incidence of temporary employees is as high as 18% on an overall basis, it is particularly high in housekeeping.

Function Domain	% Temporary Employees
Administration	5
Facilitation Cell	1
Front Office	5
F&B (Kitchen)	5
F&B (Service)	13
House Keeping	37
Accounts & Billing	3
EDP	4
Security	17
Sales & Marketing	0
Purchase	2
Human Resource	0
Public Relation	0
Maintenance	10
Telephone	17
Laundry	55
Total	18

5.3.6 Employee Turnover

The rate of employee turnover stood at almost 16% in the medical and wellness units on a pan-India basis.

Function Domain	% Employee Turnover
Administration	21
Facilitation Cell	9
Front Office	27
F&B (Kitchen)	20
F&B (Service)	16
House Keeping	13
Accounts & Billing	18
EDP	8
Security	20
Sales & Marketing	15
Purchase	32
Human Resource	27
Public Relation	8
Maintenance	21
Telephone	8
Laundry	0
Total	16

5.4 Recruitment Pattern

5.4.1 Annual Demand for Manpower at Entry Level

Approximately, 6260 people were hired at the entry level in the year 2009 – 10, with a substantial proportion in housekeeping, front office and administration.

Number of Entry Level Recruitment (April 2009-March 2010)	
Function Domain	Total Demand
Administration	747
Facilitation Cell	306
Front Office	285
F&B (Kitchen)	428
F&B (Service)	523
House Keeping	2038
Accounts & Billing	326
EDP	177
Security	95
Sales & Marketing	476
Purchase	353
Human Resource	54
Public Relation	54
Maintenance	109
Telephone	68
Laundry	224
Total	6263

5.5 Employment Forecast

5.5.1 Employment Forecast 2012

Total Employees in March 2012	
East	3888
North	34914
South	26827
West	32193
North East	--
All India	97822

5.5.2 Employment Pattern (across Functional Domains)

Total Employees in March 2012	
Administration	11012
Facilitation Cell	5053
Front Office	7089
F&B (Kitchen)	6788
F&B (Service)	10333
House Keeping	19459
Accounts & Billing	5808
EDP	1810
Security	6788
Sales & Marketing	4450
Purchase	3469
Human Resource	1961
Public Relation	1961
Maintenance	4224
Telephone	4902
Laundry	2716
Total	97822

5.5.3 Employment Pattern (across Level of Operation)

Total Employees in March 2012		
Function Domain	Managerial	Non-managerial
Administration	4295	6717
Front office	1276	5813
F&B (Kitchen)	1426	5363
F&B(Service)	1033	9300
House keeping	3113	16345
Total	11143	43538

5.5.4 Employment Pattern (across Level of Training)

Total Employees in March 2012			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	7244	3767	--
Front office	3332	3474	284
F&B (Kitchen)	4356	2432	--
F&B(Service)	4780	4957	597
House keeping	11569	5642	2247
Total	31281	20272	3128

5.5.5 Employment Forecast 2017

Total Employees in March 2017	
East	9675
North	86878
South	66755
West	80106
North East	--
All India	243413

5.5.6 Employment Pattern (across Functional Domains)

Total Employees in March 2017	
Administration	27401
Facilitation Cell	12573
Front Office	17640
F&B (Kitchen)	16891
F&B (Service)	25713
House Keeping	48420
Accounts & Billing	14451
EDP	4504
Security	16891
Sales & Marketing	11072
Purchase	8632
Human Resource	4880
Public Relation	4880
Maintenance	10509
Telephone	12197
Laundry	6758
Total	243413

5.5.7 Employment Pattern (across Level of Operation)

Total Employees in March 2017		
Function Domain	Managerial	Non-managerial
Administration	10686	16714
Front office	3175	14465
F&B (Kitchen)	3547	13344
F&B(Service)	2571	23142
House keeping	7747	40672
Total	27726	108337

5.5.8 Employment Pattern (across Level of Training)

Total Employees in March 2017			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	18026	9374	--
Front office	8291	8644	706
F&B (Kitchen)	10839	6052	--
F&B(Service)	11893	12334	1486
House keeping	28787	14040	5592
Total	77836	50444	7784

5.5.9 Employment Forecast 2022

Total Employees in March 2022	
East	24073
North	216180
South	166107
West	199328
North East	--
All India	605689

5.5.10 Employment Pattern (across Functional Domains)

Total Employees in March 2022	
Administration	68181
Facilitation Cell	31287
Front Office	43894
F&B (Kitchen)	42030
F&B (Service)	63982
House Keeping	120483
Accounts & Billing	35959
EDP	11208
Security	42030
Sales & Marketing	27551
Purchase	21479
Human Resource	12144
Public Relation	12144
Maintenance	26151
Telephone	30350
Laundry	16816
Total	605689

5.5.11 Employment Pattern (across Level of Operation)

Total Employees in March 2022		
Function Domain	Managerial	Non-managerial
Administration	26591	41591
Front office	7901	35993
F&B (Kitchen)	8826	33204
F&B(Service)	6398	57584
House keeping	19277	101206
Total	68993	269578

5.5.12 Employment Pattern (across Level of Training)

Total Employees in March 2022			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	44855	23326	--
Front office	20630	21508	1756
F&B (Kitchen)	26972	15059	--
F&B(Service)	29594	30690	3698
House keeping	71632	34935	13916
Total	193683	125518	19370

5.6 Annual Demand for Manpower at Entry Level**5.6.1 Annual Demand for Manpower at Entry Level**

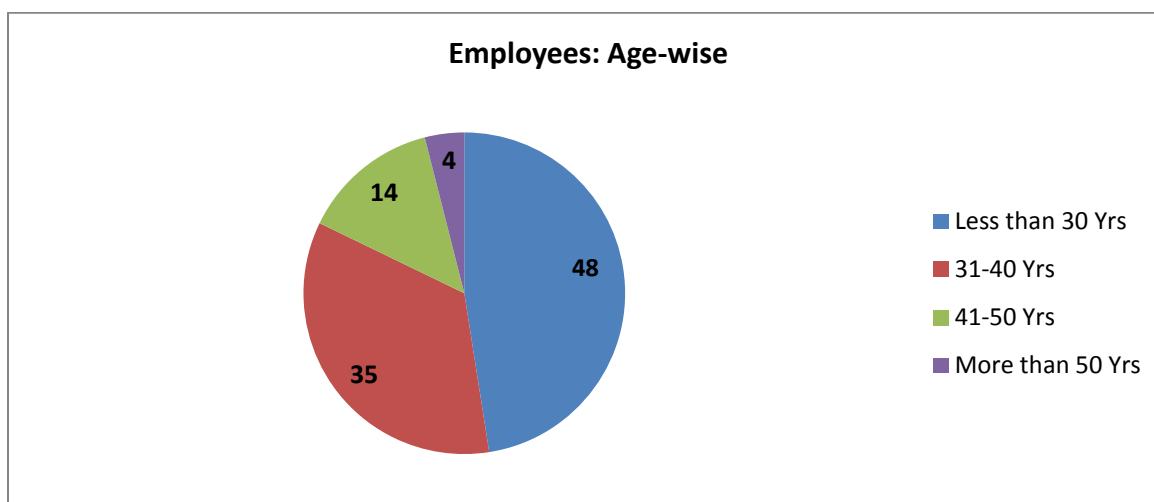
Projected Annual Demand for Manpower			
Function Domain	2011-2012	2016-2017	2021-2022
Administration	1557	3875	9643
Front office	638	1588	3952
F&B (service)	593	1477	3674
F&B(Kitchen)	892	2219	5521
House keeping	1090	2712	6748
Others	4248	10570	26303
Total	9019	22441	55842

5.7 Employee Profile

5.7.1 Administration: Employee Profile

Age Profile

Almost 48% of the employees in administration are less than 30 years old. Almost half of them were reported to have had formal training. The average monthly salary at the manager level was Rs. 20,775.



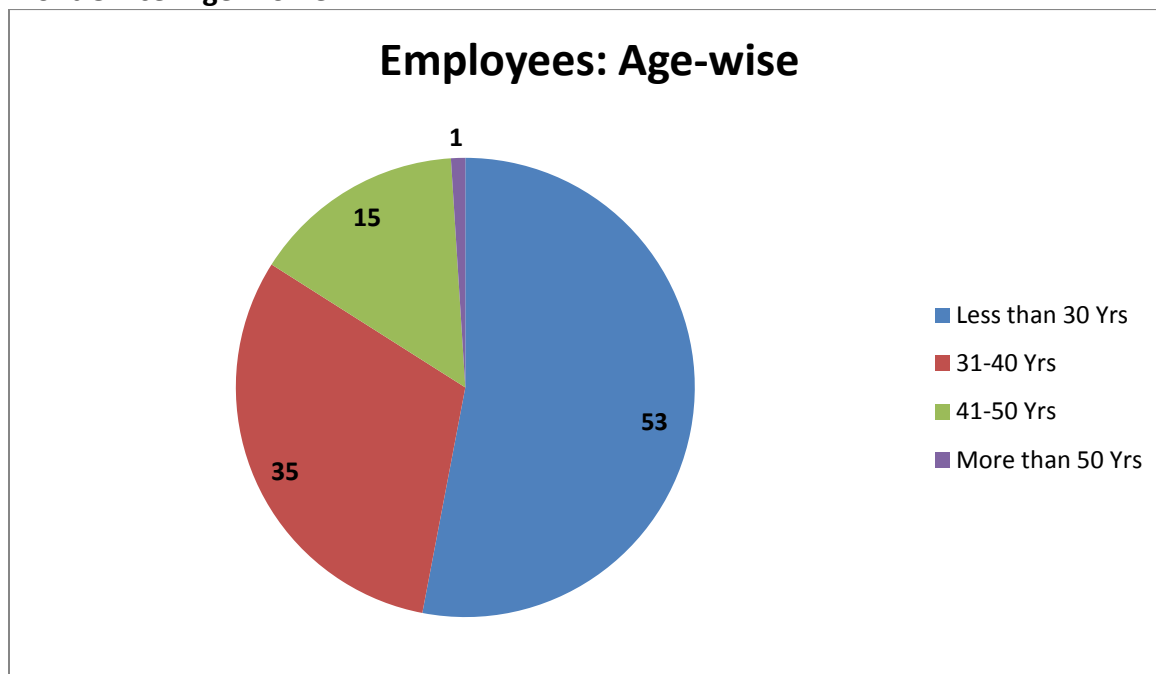
Administration: Organization Hierarchy & Salary

Organization Hierarchy	% Employees at Different Tiers	Average Salary Rs.	Incidence of Formal Training (%)
Manager	39	20775	79
Coordinators	56	12058	54
Others	5	9800	100

5.7.2 Front office: Employee Profile

Almost 53% of the employees in the front office are less than 30 years old. Almost half of them were designated as executives and were reported to have had formal training. The average monthly salary at the manager level was Rs. 16,286.

Front Office: Age Profile



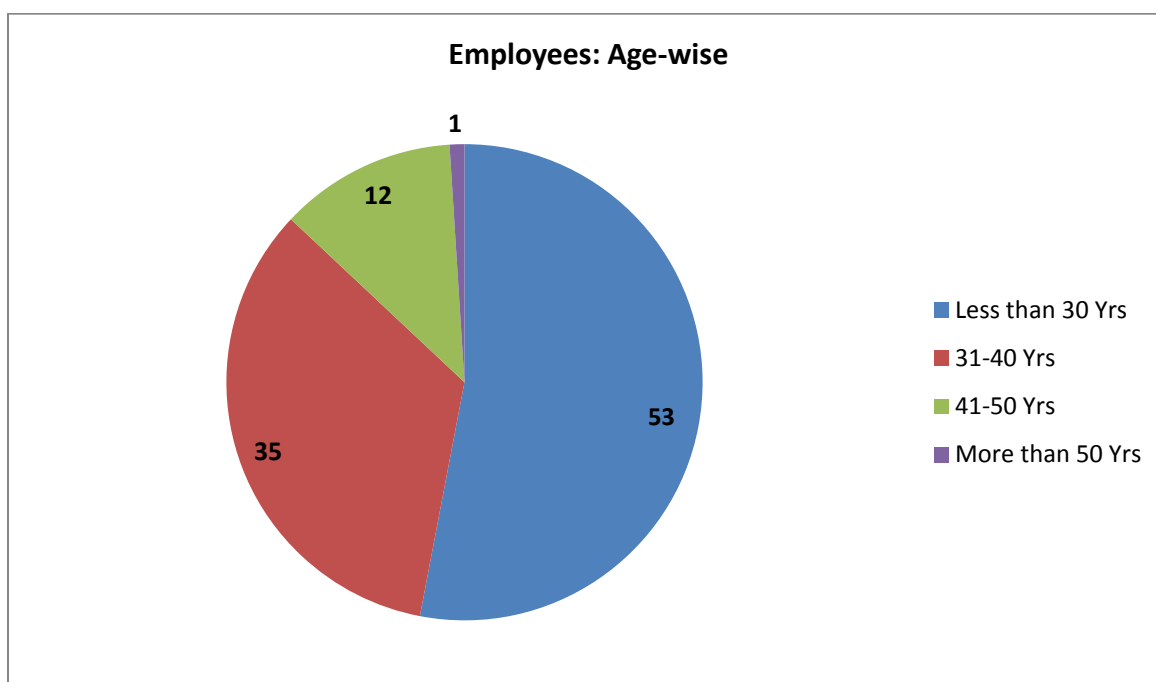
Front Office : Organization Hierarchy

Organization Hierarchy	% Employees at Different Tiers	Average Salary Rs.	Incidence of Formal Training (%)
Manager	18	16286	39
Supervisors	30	9885	50
Executive	52	8471	48
Others	0	--	--

5.7.3 F&B Kitchen: Employee Profile

Almost 53% of the employees in F&B Kitchen are less than 30 years old. There was a uniform spread of employees between chefs, supervisors and importantly dietitians. However, the reported salary levels were low across levels.

F&B Kitchen Age Profile



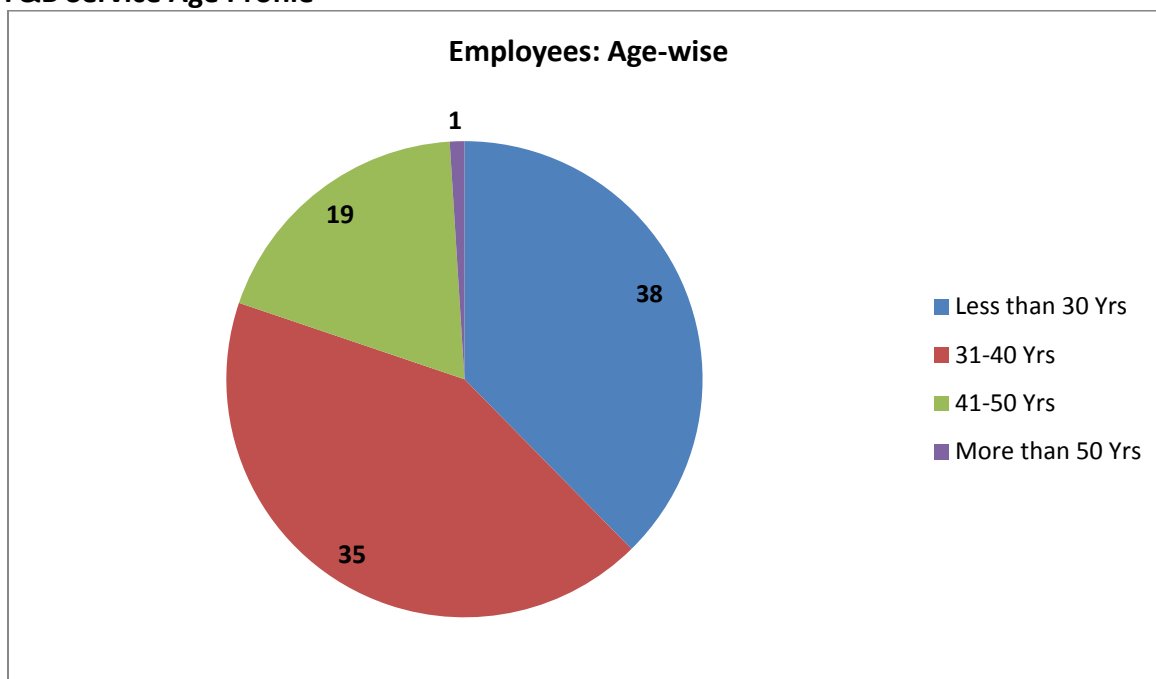
F&B Kitchen Organization Hierarchy & Salary

Organization Hierarchy	% Employees at Different Tiers	Average Salary Rs.	Incidence of Formal Training (%)
Chefs	21	8002	74
Supervisor	20	8064	72
Helpers	37	5955	59
Dietitian	23	8000	57

5.7.4 F&B Service: Employee Profile

Almost 73% of the employees in administration are less than 40 years old. Incidence of formal training was reported to be low across levels.

F&B Service Age Profile



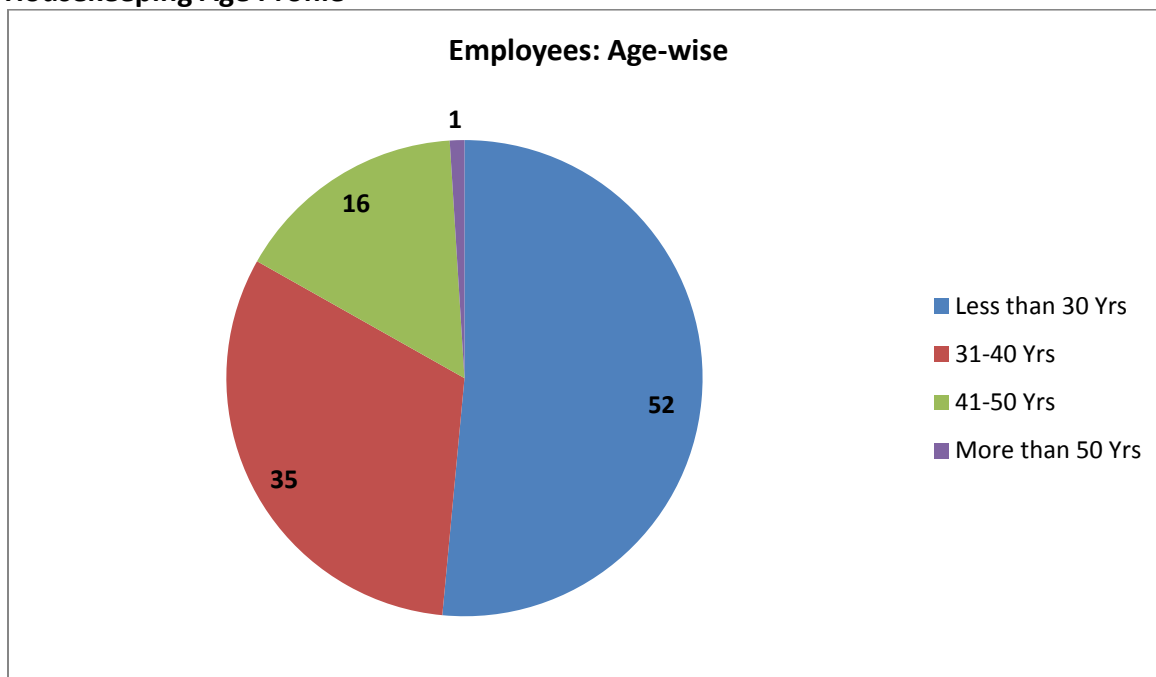
F&B Service Organization Hierarchy & Salary

Organization Hierarchy	% Employees at Different Tiers	Average Salary Rs.	Incidence of Formal Training (%)
Director	1	15000	100
F&B Manager	4	12000	0
Restaurant Manager	5	5010	17
Captains	29	8429	77
Stewards	28	7388	56
Helpers	33	4125	20

5.7.5 Housekeeping: Employee Profile

Almost 52% of the employees in administration are less than 30 years old. Cleaners and sweepers form the biggest chunk of employees in this function.

Housekeeping Age Profile



Housekeeping : Organization Hierarchy & Salary Levels

Organization Hierarchy	% Employees at Different Tiers	Average Salary Rs.	Incidence of Formal Training (%)
Manager	16	12000	52
Supervisor	26	6445	74
Sweepers/ cleaners	57	4474	57

5.8 Selection Process of Medical & Wellness units' Employees

5.8.1 Selection Process of Medical & Wellness unit Employees

Selection process –All India (%)				
Departments	Interview	Written test	Practical test	Other
Facilitation cell	100	--	--	--
Front office	91	5	5	5
F&B (Kitchen)	93	7	21	7
F&B (Service)	100	--	19	6
House-keeping	100	--	--	--

5.9 Method for Hiring Medical & Wellness units' Employees

5.9.1 Method for Hiring of Medical & Wellness unit Employees

Method for Hiring - All India (%)				
Departments	Campus recruitment	Advertisement	Placement consultants	Other
Facilitation cell	5	80	45	30
Front office	5	76	48	29
F&B (Kitchen)	--	88	19	25
F&B (Service)	6	77	18	29
House-keeping	--	74	26	39

CHAPTER 6

EMPLOYMENT IN TOUR & TRAVEL UNITS IN INDIA

6.1 Snapshot of Employment in Travel & Tour Firms in India

	East	North	South	West	N East	All India
Number of Travel & Tour Firms in 2010	983	2799	2611	1556	129	8078
Average Growth						2
Total Employment	8054	31597	35792	20370	410	96223
Average Employment Intensity	10.5	12.6	14.0	14.0	2.0	12
Annual Demand for Manpower in 2010	--	402	5989	7817	--	14213
Trained Manpower Output (students who graduated in 2009-2010)	--	--	--	-	-	17473

- Note: Forecast in employment in Tour & Travel units is based on the growth registered in the period 2002-2010, as per the two surveys.

6.2 Tour & Travel Units in India

In all, there are more than 8,000 Tour & Travel entities in India, spread across the four geographic regions. Travel agencies and tour operators account for 38% and 43% of them. North and South account for almost two-thirds of all travel and tour entities in India.

Number of Tour & Travel Units in March 2010				
Region	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
East	501	344	--	138
North	700	1595	112	392
South	1018	862		731
West	840	550	7	159
North East	13	116	--	--
All India	3072	3467	119	1420

6.3 Employment Pattern

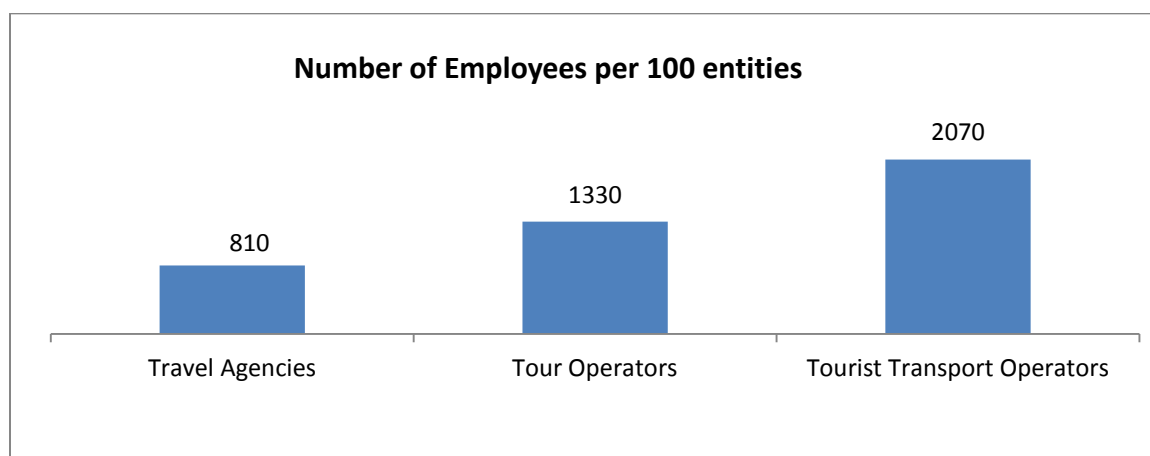
6.3.1 Employment in Tour & Travel Units

The Tour & Travel units employ more than 96,000 people across various functions, in India.

Total Employees in March 2010				
Region	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
East	4509	688	--	2857
North	8120	14355	1008	8114
South	10893	9913	--	14986
West	8064	8745	63	3498
North East	39	371	--	--
All India	31625	34072	1071	29455

6.3.2 Number of Employees per 100 Units

Each travel agency, on an average, employs 8 people. The employment intensity of tourist transport operators is the highest at almost 21.



6.3.3.1 Employment Pattern (across Functional Domains)

Tours and ticketing functions employ half the total workforce, followed by accounts and administration.

Total Employees in March 2010					
Departments	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator	% in Functional Domains
Administration/ Operations	5628	4193	357	4436	15
Ticketing	8788	8059	--	6565	24
Foreign Exchange	1205	2555	--	177	4
Tours	7789	11139	357	5678	26
Sales & Marketing	2851	3866	238	1065	8
Accounts	3924	3145	119	10469	18
Facilitation	1440	1114	--	1065	4
Total	31625	34072	1071	29455	100

6.3.3.2 Employment Pattern (across Level of Operation)

Total Employees in March 2010		
	Level of Operation	
Function Domain	Managerial	Non-managerial
Administration	9061	5553
Ticketing	3044	20368
Tours	999	23964
Total	13104	49885

6.3.3.3 Employment Pattern (across Level of Training)

Total Employees in March 2010			
	Level of Training		
Function Domain	Formally trained	Trained at Job	Untrained
Administration	8417	5957	240
Ticketing	10680	12121	612
Tours	12755	11437	770
Total	31852	29515	1622

6.3.4 Incidence of Temporary Employees

The travel agencies and tour operators reported temporary employment to the extent of 10% and 25% respectively.

% Employees who are Temporary		
Departments	Travel Agency	Tour Operator
Administration/ Operations	3	6
Ticketing	11	26
Foreign Exchange	6	7
Tours	14	29
Sales & Marketing	18	27
Accounts	6	21
Facilitation	5	55
Total	10	25

6.3.5 Employee Turnover

Rate of employee turnover is high particularly among tour operators at 50%. Sales and marketing function in travel agencies and facilitation in tour operators witness the highest attrition rates.

% Employee Turnover				
Functional Domain	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Administration/ Operations	31	35	--	28
Ticketing	23	54	--	30
Foreign Exchange	29	62	--	--
Tours	30	46	--	3
Sales & Marketing	53	53	--	--
Accounts	48	49	--	17
Facilitation	8	61	--	--
Total	32	50	--	17

6.4 Recruitment Pattern

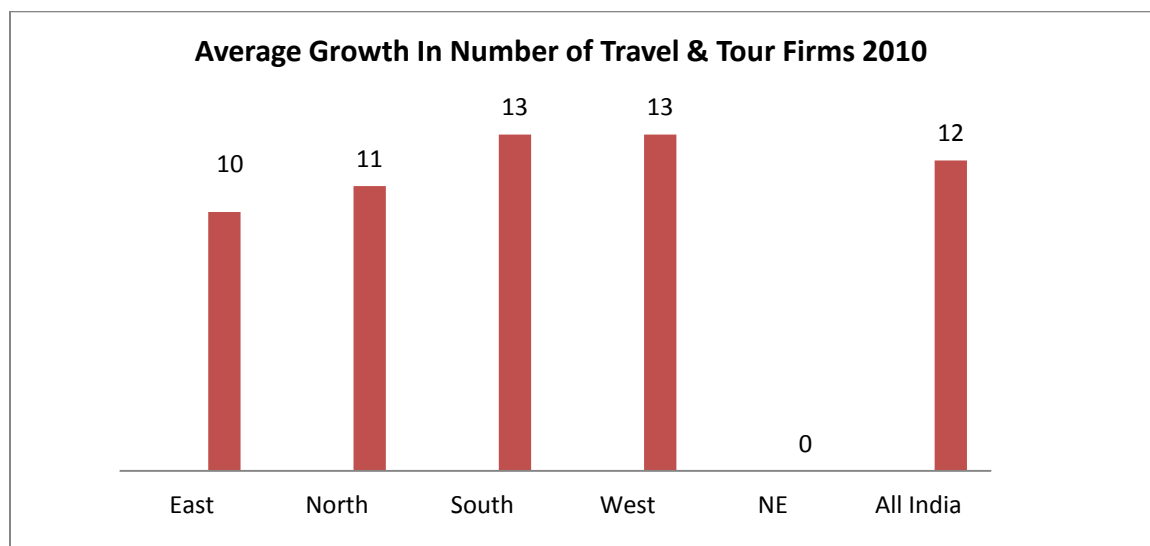
6.4.1 Annual Demand for Manpower at Entry Level

The recruitment at the entry level touched almost 14,000 in 2010. A large proportion of them were hired by tour operators, partly to offset high employee turnover rates. Adventure tour operators did not report any hiring at the entry level.

Annual Demand for Trained Manpower at Entry Level (April 2009-March 2010)				
Departments	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Administration/ Operations	232	501	--	425
Ticketing	2947	2513	--	1001
Tours	210	862	--	9
Sales & Marketing	1113	2881	--	230
Accounts	225	516	--	6
Facilitation	235	254	--	54
Total	4962	7526	--	1725

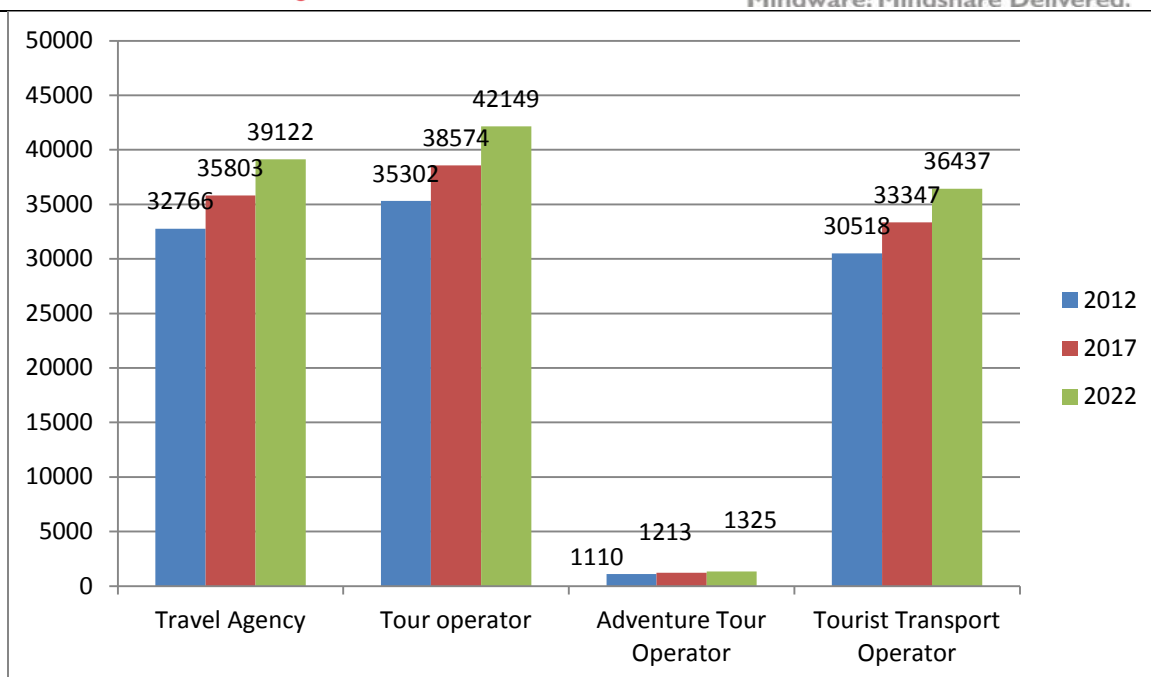
6.5 Forecast (2010 - 2022)

6.5.1 Growth in Number of Travel & Tour Firms



6.6 Employment Forecast (2012 – 2022)

On the basis of growth in the number of travel and tour institutes registered by the Ministry of Tourism statistics, the total employment in this sector will touch 250,000 in 2017 and 450,000 by the year 2022.



6.6.1 Employment Forecast by Regions (2012)

Forecast in Tour & Travel firms is based on the growth registered in the period 2002 – 2010, as revealed by Ministry of Tourism statistics.

Employment Forecast – March 2012				
Region	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
East	4672	713	--	2960
North	8413	14873	1044	8407
South	11286	10271	--	15527
West	8355	9061	65	3624
North East	40	384	--	--
All India	32766	35302	1110	30518

6.6.2 Employment Forecast 2012 (across Functional Domain)

Total Employees in March 2012				
Function Domain	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Administration/ Operations	5831	4344	370	4596
Ticketing	9105	8351	--	6803
Foreign Exchange	1249	2647	--	184
Tours	8070	11541	370	5883
Sales & Marketing	2954	4005	247	1103
Accounts	4065	3258	123	10847
Facilitation	1492	1154		1103
Total	32766	35302	1110	30518

6.6.3 Employment Forecast 2012 (across Level of Operation)

Total Employees in March 2012		
Function Domain	Level of Operation	
	Managerial	Non-managerial
Administration	9387	5754
Ticketing	3154	21105
Tours	1035	24829
Total	13576	51688

6.6.4 Employment Forecast 2012 (across Level of Training)

Total Employees in March 2012			
	Level of Training		
Function Domain	Formally trained	Trained at Job	Untrained
Administration	8721	6172	248
Ticketing	11067	12558	634
Tours	12755	11437	771
Total	32543	30167	1653

6.6.5 Employment Forecast 2017

Employment Forecast – March 2017				
Region	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
East	5105	779	--	3234
North	9193	16252	1141	9186
South	12332	11223	--	16966
West	9129	9900	71	3960
North East	44	420	--	--
All India	35803	38574	1213	33347

6.6.6 Employment Forecast 2017 (across Functional Domain)

Total Employees in March 2017				
Function Domain	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Administration/ Operations	6372	4747	404	5022
Ticketing	9949	9125	--	7433
Foreign Exchange	1364	2893	--	201
Tours	8817	12611	404	6429
Sales & Marketing	3227	4377	270	1205
Accounts	4442	3560	134	11852
Facilitation	1630	1261		1205
Total	35803	38574	1213	33347

6.6.7 Employment Forecast 2017 (across Level of Operation)

Total Employees in March 2017		
Function Domain	Managerial	Non-managerial
Administration	10258	6287
Ticketing	3446	23061
Tours	1130	27131
Total	14834	56479

6.6.8 Employment Forecast 2017 (across Level of Training)

Total Employees in March 2017			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	9530	6744	271
Ticketing	12092	13722	693
Tours	14440	12948	873
Total	36062	33414	1837

6.6.9 Employment Forecast 2022

Employment Forecast in March 2022				
Region	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
East	5578	851	--	3534
North	10045	17758	1247	10037
South	13475	12263	--	18538
West	9976	10818	78	4327
North East	48	459	--	--
All India	39122	42149	1325	36437

6.6.10 Employment Forecast 2022 (across Functional Domain)

Total Employees in March 2022				
Function Domain	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Administration/ Operations	6962	5187	441	5488
Ticketing	10872	9970	--	8122
Foreign Exchange	1491	3161	--	219
Tours	9635	13779	441	7024
Sales & Marketing	3526	4782	295	1317
Accounts	4854	3890	147	12951
Facilitation	1781	1378	--	1317
Total	39122	42149	1325	36437

6.6.11 Employment Forecast 2022 (across Level of Operation)

Total Employees in March 2022		
Function Domain	Managerial	Non-managerial
Administration	11208	6870
Ticketing	3765	25199
Tours	1235	29644
Total	16208	61713

6.6.12 Employment Forecast 2022 (across Level of Training)

Total Employees in March 2022			
Function Domain	Formally trained	Trained at Job	Untrained
Administration	10413	7369	296
Ticketing	13213	14994	757
Tours	15778	14148	954
Total	39404	36511	2007

6.7.1 Annual Demand for Manpower at Entry Level Forecast 2012

Annual Demand for Manpower at Entry Level 2011-2012				
Departments	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Administration/ Operations	239	517	--	438
Ticketing	3039	2591	--	1032
Tours	217	889	--	9
Sales & Marketing	1148	2971	--	237
Accounts	232	532	--	6
Facilitation	242	262	--	56
Total	5117	7761	--	1779

6.7.2 Annual Demand for Manpower at Entry Level Forecast 2017

Annual Demand for Manpower at Entry Level 2016-2017				
Departments	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Administration/ Operations	255	550	--	467
Ticketing	3236	2759	--	1099
Tours	231	946	--	10
Sales & Marketing	1222	3163	--	253
Accounts	247	567	--	7
Facilitation	258	279	--	59
Total	5448	8263	--	1894

6.7.3 Annual Demand for Manpower at Entry Level Forecast 2022

Annual Demand for Manpower at Entry Level 2021-2022				
Departments	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Administration/ Operations	279	603	--	512
Ticketing	3549	3027	--	1206
Tours	253	1038	--	11
Sales & Marketing	1340	3470	--	277
Accounts	271	621	--	7
Facilitation	283	306	--	65
Total	5976	9064	--	2078

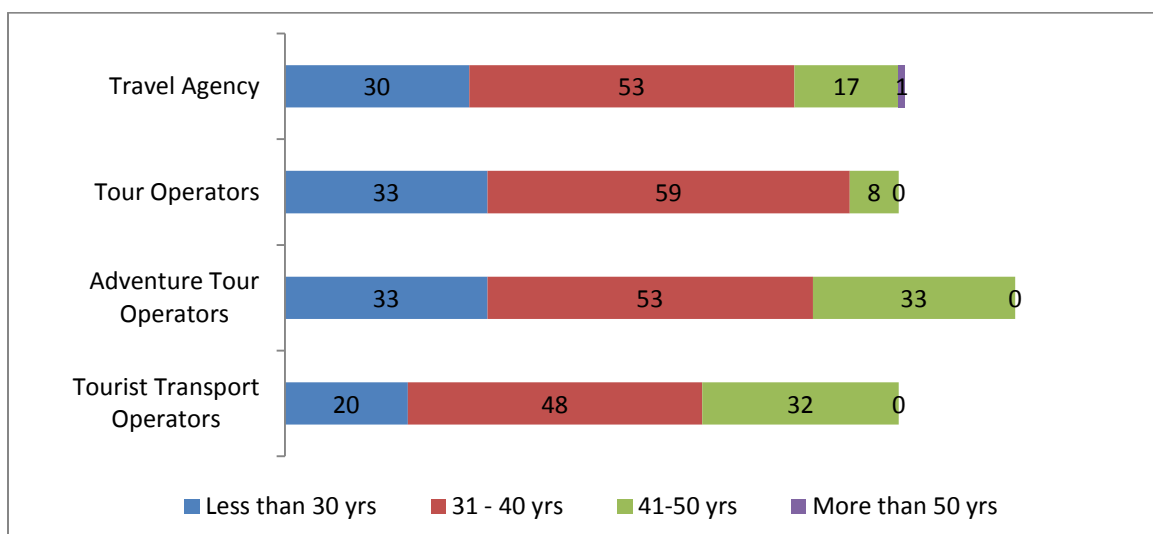
6.8 Travel & Tour Employee Profile

6.8.1 Tour & Travel Administration: Employee Profile

A majority of the employees in the administration function are 31 – 40 years old. The General Managers number less than 20% of the administration workforce while the managers form the largest proportion of the employees.

The salary structure is more flat as compared to other segments of the hospitality sector. Incidence of formal training among employees is significantly higher among the managers as compared to the senior-most echelon.

Administration Age Profile



Administration: Organization Hierarchy

% Employees at Different Tiers				
Organization Hierarchy	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
General Manager	17	10	--	12
Manager	45	51	--	48
Executive	24	30	100	16
Assistants	13	9	--	24
Others	1	0	--	--

Administration: Current Salary Levels

Average Salary Rs.				
	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
General Manager	18106	20000	--	17500
Manager	13332	12589	--	11000
Executive	8585	9464	10000	9000
Assistants	5348	7800	--	6600

Administration: Incidence of Formal Training

Incidence of Formal Training (%)				
	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
General Manager	66	100	--	67
Manager	61	62	--	58
Executive	49	55	100	75
Assistants	37	33	--	83

6.8.2 Ticketing: Employee Profile

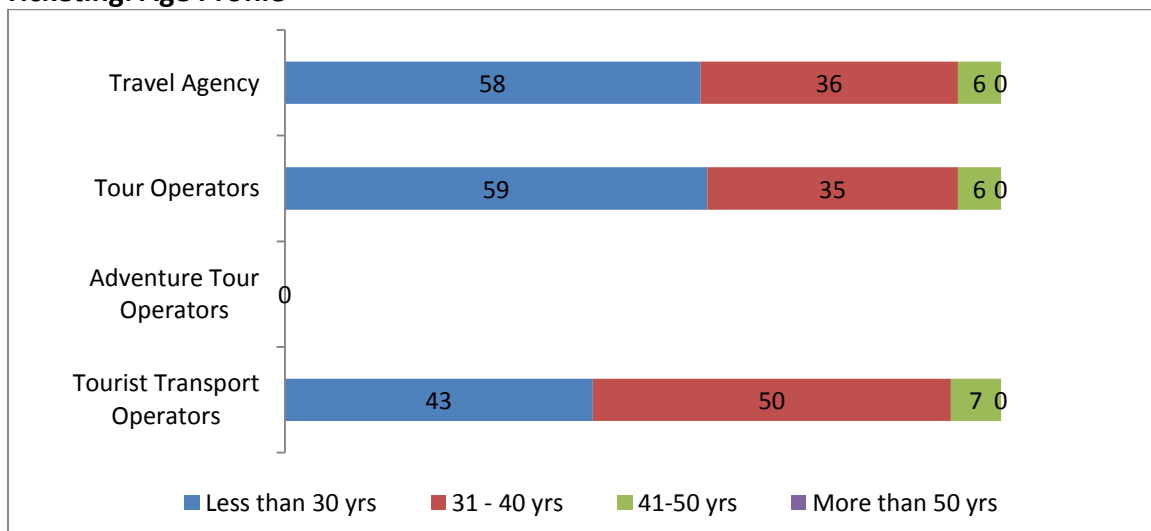
The largest proportion of employees in the ticketing function are less than 30 years old.

Executives form the largest chunk of employees in this function.

The salary structure is more flat as compared to other segments of the hospitality sector.

Incidence of formal training among employees is significantly higher among the executives.

Ticketing: Age Profile



Ticketing: Organization Hierarchy

% Employees at Different Tiers				
Organization Hierarchy	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Managers	7	15	--	38
Executives	64	54	--	46
Assistants	27	31	--	16
Others	2	--	--	--

Ticketing: Current Salary Levels

Average Salary Rs.				
	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Managers	13903	11833	--	11000
Executives	8534	8661	--	8666
Assistants	5494	7735	--	6500

Ticketing: Incidence of Formal Training

Incidence of Formal Training (%)				
	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Managers	78	65	--	62
Executives	48	56	--	14
Assistants	34	35	--	55

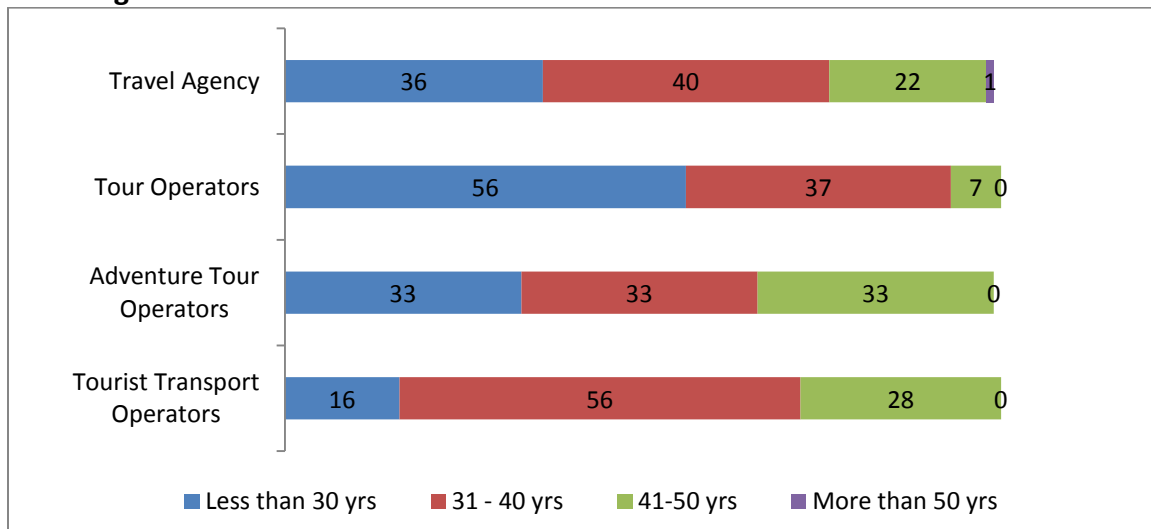
6.8.3 Tours: Employee Profile

A majority of the employees in the administration function are less than 40 years old.

Drivers form the largest chunk of employees in this function where the General Managers are conspicuous by their absence.

The salary structure is on the lower side as compared to other functions.

Tours: Age Profile



Tours: Organization Hierarchy

% Employees at Different Tiers in Tours				
Organization Hierarchy	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Managers	2	7	--	3
Executives	25	31	100	34
Assistance	10	17	--	3
Guides	12	14	--	9
Drivers	49	31	--	50

Tours: Current Salary Levels

Average Salary Rs.				
	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Managers	10291	12727	--	15000
Executives	8832	8521	8000	10000
Assistance	5500	7075	--	8333
Guides	5090	6500	--	12500
Drivers	6127	7029	--	4350

Tours: Incidence of Formal Training

Incidence of Formal Training (%)				
	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Managers	79	71	--	100
Executives	55	47	100	18
Assistance	25	31	--	--
Guides	39	55	--	33
Drivers	58	43	--	100
Others	67	--	--	--

6.9 Selection Process of Tour & Travel Employees

6.9.1 Selection Process of Tour & Travel Employees in Travel Agency

Selection process –Travel Agency (%)				
Departments	Interview	Written test	Practical test	Other
Administration	90	6	15	5
Ticketing	92	6	24	5
Tours	95	5	23	7

6.9.2 Selection Process of Tour & Travel Employees in Tour Operators

Selection process –Tour Operator (%)				
Departments	Interview	Written test	Practical test	Other
Administration	100	3	3	--
Ticketing	100	3	14	--
Tours	100	3	11	--

6.9.3 Selection Process of Tour & Travel Employees in Adventure Tour Operator

Selection process – Adventure Tour Operator (%)				
Departments	Interview	Written test	Practical test	Other
Administration	100	--	--	--
Ticketing	--	--	--	--
Tours	100	--	--	--

6.9.4 Selection Process of Tour & Travel Employees in Tourist Transport Operators

Selection process – Tourist Transport Operators (%)				
Departments	Interview	Written test	Practical test	Other
Administration	67	--	33	17
Ticketing	83	--	17	--
Tours	67	--	33	17

6.10 Method of Hiring Tour & Travel Employees

6.10.1 Method for Hiring of Tour & Travel Employees in Travel Agency

Method of Hiring (%)				
Departments	Campus recruitment	Advertisement	Placement consultants	Other
Administration	8	76	39	59
Ticketing	7	67	37	65
Tours	6	77	35	65

6.10.2 Method for Hiring of Tour & Travel Employees in Tour Operator

Method of Hiring (%)				
Departments	Campus recruitment	Advertisement	Placement consultants	Other
Administration	7	68	32	61
Ticketing	8	50	26	61
Tours	9	51	23	63

6.10.3 Method for Hiring of Tour & Travel Employees in Adventure Tour Operator

Method of Hiring (%)				
Departments	Campus recruitment	Advertisement	Placement consultants	Other
Administration	--	100	--	100
Ticketing	--	--	--	--
Tours	--	100	--	100

6.10.4 Method for Hiring of Tour & Travel Employees in Tourist Transport Operators

Method of Hiring (%)				
Departments	Campus recruitment	Advertisement	Placement consultants	Other
Administration	--	38	25	61
Ticketing	--	43	29	65
Tours	--	60	40	60

6.11 Required Qualification for Different Departments & Functions

6.11.1 Required Qualifications in Administration

Qualification				
Type of Manpower	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
General Manager	IATA degree / Diploma in tourism	Diploma in Tourism	--	Graduates
Managers	Diploma in tourism or Degree	Diploma in Tourism	--	Diploma in Tourism
Executives	Undergraduate	Graduates	Graduates	Undergraduates
Assistants	Undergraduate	Undergraduate	--	Undergraduates

6.11.2 Required Qualification in Ticketing

Qualification				
Type of Manpower	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Managers	Diploma in Tourism	Diploma in Tourism	--	--
Supervisors	Undergraduates	Diploma or Computer knowledge	--	--
Assistants	Computer Knowledge	Undergraduates	--	--

6.11.3 Required Qualification in Tours

Qualification				
Type of Manpower	Travel Agency	Tour Operator	Adventure Tour Operator	Tourist Transport Operator
Managers	Diploma in Tourism	Diploma in Tourism	--	--
Executives	Computer Knowledge	Computer Knowledge	Graduates	Diploma in Tourism
Assistance	Undergraduates	Undergraduates	--	--
Guides	Govt license after guide training course	Govt license after guide training course	--	--
Drivers	Driving License	Driving License	Driving License	Driving License

CHAPTER 7

EDUCATION & TRAINING
INFRASTRUCTURE FOR THE HOSPITALITY
SECTOR IN INDIA

7.1. Universe of Education & Training Institutes

This research has estimated a total of 337 training institutes for the hospitality sector. There are 38 government owned hotel management and food craft institutes. There are almost 200 others which are either affiliated to a university or approved by the AICTE; some of them also offer courses in travel & tour. There are 101 stand-alone travel and tour institutes, including IITTM that offer courses related to ticketing, tours and tourism. In addition to the 38 CIHMs, SIHMs and FCIs, there are another 19 PIHMs.

Number of Education & Training Institutes in March 2010			
Region	Government Owned Hotel Management Institutes	Private Sector Hotel Mgmt. Institutes	Travel & Tour Institutes
East	4	12	8
North	18	57	30
South	6	93	31
West	6	36	31
North East	4	0	1
All India	38	198	101

7.2 Supply of Students for Hospitality Sector

7.2.1 Annual Supply of Students

A total of almost 63040 students completed various courses at both the government owned and private sector institutes in the year 2010. The students completing certificate courses include those going through the 'Hunar se Rozgar' programme.

Total Students 2010			
Region	Govt. Owned Hotel Management Institutes	Private Sector Hotel Mgmt. Institutes	Travel & Tour Institutes
Degree	8579	12100	1667
Diploma/ Skill testing & certificates including short term certificate courses in the private sector	18590	7106	14999
Total	27169	19206	16666

7.2.3 Placement Scenario

As per the survey, 61% of all the students were placed in hotels. Only 11% joined restaurants while almost 28% were placed outside hotels and restaurants.

% Students that were Placed in 2009 – 2010				
Region	Hotels	Restaurants	Others	Average Salary Rs
East	67	2	31	10500
North	52	13	35	10387
South	66	12	22	8727
West	63	14	23	9861
North East	--	--	--	--
All India	61	11	28	10258

7.3 Courses Offered

Diploma in Hotel Management & Tourism Management
B.Sc in Hotel Management & Tourism
Diploma in Catering
Diploma in Food Production
Diploma in Cookery/Bakery
Certificate in Bar Tending
Diploma in Front Office
Degree in F& B Service
MBA in Hospitality
BBA in Hospitality
BA in international Hospitality administration & Hotel Management
Diploma in Front Office & House Keeping
Diploma in Culinary Management
Advanced diploma in Hospitality Management
Restaurant Venture Management
Certificate in Travel agency & Tour operations
Certificate in Computerized ticketing system
Master of Tourism Administration & MBA in Tour & Travel
Undergraduate Diploma in Tour & Travel
Diploma in Travel & Tourism

7.4 Forecast of Annual Supply of Students

7.4.1 Annual Supply of Students in the Hospitality Sector: Forecast 2012

Total Students 2012			
Region	Government Owned Hotel Management Institutes	Private Sector Hotel Mgmt. Institutes	Travel & Tour Institutes
Degree	8579	12991	1699
Diploma/ Skill testing & certificates including short term certificate courses in the private sector	25006	7627	15270
Total	33585	20618	16969

7.4.2 Annual Supply of Students in the Hospitality Sector: Forecast 2017

Total Students 2017			
Region	Government Owned Hotel Management Institutes	Private Sector Hotel Mgmt. Institutes	Travel & Tour Institutes
Degree	12331	15514	1780
Diploma/ Skill testing & certificates including short term certificate courses in the private sector	49470	9102	15970
Total	61801	24616	17750

7.4.3 Annual Supply of Students in the Hospitality Sector: Forecast 2022

Total Students 2022			
Region	Government Owned Hotel Management Institutes	Private Sector Hotel Mgmt. Institutes	Travel & Tour Institutes
Degree	13516	18528	1866
Diploma/ Skill testing & certificates including short term certificate courses in the private sector	64490	12885	16702
Total	78006	31413	18568

7.5 Faculty Profile in Training Institutes

7.5.1. Size of Faculty

Average Number of Teaching Staff per Institute			
	Government Owned Hotel Management Institutes	Private Sector Hotel Mgmt. Institutes	Travel & Tour Institutes
Permanent	11	10	8
Visiting	18	5	7
Total Teaching Staff per Institute	29	15	15
Average Salary Rs.	NA	20312	16047

Government owned institutes reported a higher number of faculty. The average salary was higher in the hotel management institutes.

7.5.2 Average Number of Students Per Teaching Staff

Government Owned Hotel Management Institutes: 19

Private Sector Hotel Management Institutes: 21

Travel & Tour Institutes: 20

7.5.3 Educational Qualification of Faculty in Training Institutes

A substantial proportion of teaching staff are plain graduates across the different institutes. However, the largest number comprise post-graduates in the relevant area.

% of Faculty			
	Government Owned Hotel Management Institutes	Private Sector Hotel Mgmt. Institutes	Travel & Tour Institutes
PHD	14	9	7
Post Graduate	47	48	64
Graduate	32	37	28
Others	7	6	1

7.5.4 Age Profile

A large proportion of the instructors are less than 35 years old. This is indicative of lower levels of experience among the teaching staff.

% of Faculty			
	Government Owned Hotel Management Institutes	Private Sector Hotel Mgmt. Institutes	Travel & Tour Institutes
Less than 25 years	7	5	5
26 – 35 years	42	50	59
36 – 45 years	34	31	25
More than 46 years	18	15	11

7.5.5 Teaching Experience of Faculty

% of Faculty with varying years of experience			
	Government Owned Hotel Management Institutes	Private Sector Hotel Mgmt. Institutes	Travel & Tour Institutes
0 – 3 years	14	12	13
3-5 years	26	25	25
5-7 years	22	28	41
More than 7 years	37	34	21

CHAPTER 8.0

MANPOWER DEMAND-SUPPLY SCENARIO SUMMARY OF FINDINGS

8.1.1 Establishments in Hospitality Sector

A primary survey, trade publications as well as municipal corporation data have been used to estimate the number of establishments and the rooms in accommodation units (refer Estimation Methodology on Page 19 for details). Statistics relating to star category hotels have been obtained from H&R division of Ministry of Tourism.

For purposes of the study, accommodation units include both star category hotels and others while eating outlets include stand-alone restaurants, sweet shops and *dhabas*, with at least 10 chairs. Travel and tour firms include both those registered with Ministry of Tourism and others.

There are more than 56,000 hotels in India, with almost 95% in the unclassified category. In addition, there are over 75,000 motels located on State and National Highways. The number of eating outlets is just over a lakh in 2010.

Number of Establishments (March 2010): Regional Spread						
Segments	East	North	South	West	N East	Total
4 Star upwards Hotels	40	237	183	134	5	599
1-3 Star Hotels	67	276	911	348	28	1630
Unclassified Hotels	2937	20870	10290	19731	735	54563
Motels	12407	21389	16477	15794	8970	75037
Eating Outlets	11213	29297	24092	38651	552	103806
Travel & Tour Units	983	2799	2611	1556	129	8078
Medical Wellness Units	50	449	345	414	--	1258

Both North and West India have larger number of hotels. The Western region has the maximum number of eating outlets. Both North and South also have the largest number of travel and tour units.

8.1.2 Trend in Rooms Availability & Other Establishments

The number of rooms in accommodation units has almost doubled, from a little over 13.5 lakhs in 2002 to more than 27 lakhs in 2010. This is due to a steep increase in the number of motels on highways as well as unclassified hotels within city limits.

Trend in Availability of Hotels Rooms		
Segments	March 2002	March 2010
4 Star upwards Hotels	35574	67425
1-3 Star Hotels	42991	62183
Unclassified Hotels	1092556	1532844
Motels	186126	1050675
Total rooms in accommodation units	1357247	2713127

Travel and tour units have increased from almost 6000 to over 8000 in 2010.

Trend in Universe of Other Establishments		
Segments	March 2002	March 2010
Eating Outlets	141022	103806
Travel & Tour firms	5840	8078
Medical Wellness Units	NA	1258

8.2 Employment Intensity Norms

A primary survey has been used to estimate the employment intensity norms. In the current survey, employment of vendors to whom certain services have been outsourced has been included; this has resulted in a higher employment intensity in star category hotels, in 2010. Also, it has been observed that the security function now has a larger number of employees, both internally as well as at the vendors.

Employment Intensity		
Segments	March 2002	March 2010
4 Star upwards Hotels (employees/ 100 rooms)	162	204
1-3 Star Hotels (employees/ 100 rooms)	122	152
Unclassified Hotels/ motels (employees/ 100 rooms)	67	61
Eating Outlets (employees/ 100 seating capacity)	26	31
Travel & Tour (employees/ 100 units)	1430	1403
Medical Wellness (employees/ 100 units)	Not covered	54

8.3 Employment Pattern

The employment statistics include permanent, temporary as well as employees of third party vendors to whom services have been outsourced. The employment has been computed for each state and then summed up for all the states to arrive at the national statistic.

Employment in all accommodation units and motels has more than doubled, from a little over 8.5 lakhs to more than 18.5 lakhs. Employment in eating outlets as well as travel and tour firms has registered a marginal increase and has reached 18.7 lakhs and 96000 respectively in 2010. Total employment has risen to almost 39 lakhs in 2010, an increase of almost 50% in 8 years.

Total Employment		
Segments	March 2002	March 2010
4 Star upwards Hotels	57508	137211
1-3 Star Hotels	52577	94798
Unclassified Hotels	637739	986474
Motels	107022	645113
All Hotels	854846	1863596
Eating Outlets	1659819	1870299
Travel & Tour	83500	96223
Medical Wellness	--	67932
Total Employment	2598165	3898050

Employment in accommodation units in the North is the highest, followed by Western region. The largest number of eating outlets happens to be in the West.

Total Employment March, 2010						
Segments	East	North	South	West	N East	Total
4 Star upwards Hotels	6371	51357	48547	30423	513	137211
1-3 Star Hotels	3322	12740	57028	20611	1097	94798
Unclassified Hotels	50805	448360	157602	322218	7489	986474
Motels	106670	183892	141648	135782	77122	645113
All Hotels	167168	696349	404825	509034	86221	1863596
Eating Outlets	69415	551585	507155	738252	3893	1870299
Travel & Tour firms	8054	31597	35792	20370	410	96223
Medical Wellness	2700	24246	18630	22356	--	67932
Total	247337	1303777	966402	1290012	90523	3898050

8.4 Employment Forecast

The forecast for each hospitality segment has been done on the basis of the methodology mentioned in the table below. First, the number of establishments have been computed for each year in the future on the basis of growth projections. Then, the current employment intensity norms have been applied to arrive at the total employment.

Hospitality Segment	Growth Estimation Methodology
Accommodation units	Growth in star category hotels has been computed on the basis of statistics provided by the Ministry for the period 2004 - 10. Number of unclassified accommodation units was determined in the earlier study in 2002 as has been done in the current study for the year 2009 - 10. The computed average growth is: 4 star upwards hotels – 11.2%; 1 – 3 star hotels – 6.3%; unclassified hotels – 4.3%.
Motels on highways	Growth is computed on the basis of increase in length of highways over the period 2002 – 10 and number of motels per 100 kms. Computed growth rate is 2.0%.
Restaurants	Population growth (1991 – 2001) has been assumed as the growth rate for restaurants. The earlier study in 2003 has not been used because the criterion of restaurants having at least 10 chairs has been applied this time. Computed growth rate is 2.2%.
Travel & tour units	The growth in employment from 2002 to 2010, as per the two surveys, has been computed. Computed growth rate is 2.0%.
Medical & Wellness units	Growth estimate of 20% is based on a paper published by FICCI & Ernst & Young on Indian Wellness Industry

The total employment is likely to increase to 76 lakhs by 2022. Accommodation units will have the largest number of employees at over 44 lakhs, followed by eating outlets. Medical wellness is also likely to become a substantial employer.

Total Employment Forecast			
Segments	2011 – 12	2016 – 17	2021 – 22
4 Star upwards Hotels	172760	313671	586978
1-3 Star Hotels	113243	180608	295462
Unclassified Hotels	1137607	1709071	2762041
Motels	667713	727740	793162
All Hotels	2091323	2931090	4437643
Eating Outlets	1955258	2185578	2444055
Travel & Tour	99696	108936	119033
Medical Wellness	97822	243413	605689
Total	4244099	5469017	7606420

The Western region will become the highest employer over the next 10 years, across both accommodation units and eating outlets.

Total Employment 2021 – 22						
Segments	East	North	South	West	N East	Total
4 Star+ Hotels	18499	153104	327716	85880	1779	586978
1-3 Star Hotels	4890	13358	220797	50881	5536	295462
Unclassified Hotels	95911	589866	303729	1756195	16338	2762041
Motels	131150	226094	174155	166943	94821	793162
All Hotels	250450	982422	1026397	2059899	118474	4437643
Eating Outlets	92569	743585	609977	992546	5378	2444055
Travel & Tour	9963	39087	44277	25199	507	119033
Medical Wellness	24073	216180	166107	199328	--	605689
Total	377055	1981274	1846758	3276972	124359	7606419

8.5 Annual Demand for Employees

Demand for new employees in hospitality stems from two requirements – growth in the number of establishments (resulting in additional employment) and wastage caused by either retirement or attrition (personnel moving out of the sector). The primary survey has estimated this annual demand as the recruitment of employees at the entry level, which is assumed as the total demand. This total demand less the additional employment is assumed as constituting wastage (retirement plus attrition).

The sum of the annual demand across all units has then been assumed to constitute annual demand for people, in this sector.

Annual Demand for Employees (2009 – 10)						
Segments	East	North	South	West	N East	Total
4 Star+ Hotels	107	2101	3034	1731	17	6990
1-3 Star Hotels	204	831	3828	4072	136	9071
Unclassified Hotels	4724	61443	14763	41643	433	123008
Motels	13334	22986	17706	16973	9640	80639
All Hotels	18369	87361	39331	64419	10226	219706
Eating Outlets	11928	28128	55761	166069	634	262520
Travel & Tour	0	402	5989	7817	--	14213
Medical Wellness	249	2235	1718	2061	--	6263
Total	30546	118126	102799	240366	10860	502701

A bulk of the demand, at more than 2.4 lakhs, also comes from the Western region. This is because of the higher number of eating outlets and also, because of the quicker growth expected in the accommodation units.

Annual gross demand of employees in the hospitality sector has crossed 5 lakhs and is likely to grow to almost 9.2 lakhs in 2022. Currently, eating outlets account for half of this annual demand. However, by 2022, the annual manpower demand in hotels will catch surpass that in eating hotels.

Annual Demand for Employees				
Segments	2009 – 10	2011 – 12	2016 – 17	2021 – 22
4 Star upwards Hotels	6989	8800	15977	29898
1-3 Star Hotels	9069	10834	17279	28267
Unclassified Hotels	123008	141854	213112	344412
Motels	80639	83464	90967	99145
All Hotels	219705	244952	337335	501722
Eating Outlets	262520	274717	307824	345040
Travel & Tour	14213	14656	15605	17118
Medical Wellness	6263	9019	22441	55842
Total	502701	543344	683205	919722

Note: Comparable statistics are not available for 2002.

The proportion of managerial-level manpower stands at approx. 15%. We have assumed the same proportion in future also.

Annual Demand for Employees								
Segments	2009 – 10		2011 – 12		2016 – 17		2021 – 22	
	Managerial	Non-Managerial	Managerial	Non-Managerial	Managerial	Non-Managerial	Managerial	Non-Managerial
4 Star + Hotels	1048	5941	1320	7480	2397	13580	4485	25413
1-3 Star Hotels	1360	7709	1625	9209	2592	14687	4240	24027
Unclassified Hotels	18451	104557	21278	120576	31967	181145	51662	292750
Motels	12096	68543	12520	70944	13645	77322	14872	84273
All Hotels	32956	186749	36743	208209	50600	286735	75258	426464
Eating Outlets	36753	225767	38460	236257	43095	264729	48306	296734
Travel & Tour	2985	11228	3078	11578	3277	12328	3595	13523
Medical Wellness	1253	5010	1804	7215	4488	17953	11168	44674
Total	73946	428755	80085	463259	101461	581744	138327	781395

8.6.1 Universe of education & Training Institutes

There are a total of 337 training institutes in the hospitality sector, with the highest number in South followed by North India. By comparison, Western region has a lower number of institutes.

The universe has remained more or less the same as compared to 2002; in fact, the number of private institutes has declined marginally.

Number of Establishments (March 2010): Regional Spread						
Segments	East	North	South	West	N East	Total
Education & Training Institutes	24	105	130	73	5	337

8.6.2 Annual Supply of Students

For government owned training institutes, Ministry of Tourism statistics has been used as the basis for both current statistics as well as forecasts. The primary survey has ascertained the number of private sector training institutes and their supply of students; growth in the number of such training institutes between 2002 and 2010 as well as in the number of students being trained has been used to develop forecasts.

Annual Supply of Students					
Institutes	2001 – 02	2009 – 10	2011 – 12	2016 – 17	2021 – 22
Government Owned Hotel Management Institutes	3636	27169	33585	61801	78006
Private Sector Hotel Management Institutes	14369	19206	20618	24616	31413
Travel & Tour Institutes	17630	16666	16969	17750	18568
Total	35635	63041	71172	104167	127987

Annual Supply of Students				
Training programme/ course	2009 – 10	2011 – 12	2016 - 17	2021 - 22
Degree	22346	23269	29625	33910
Diploma/ Skill testing & certificates including short term certificate courses in the private sector	40694	47903	74542	94077
Total	63040	71172	104167	127987

8.7 Annual Demand – Supply Gap

For preparation of Policy and Programmes relating to education and training infrastructure in the hospitality sector, the gap in the demand and supply of manpower in this sector needs to be quantified. In this section, the gap between demand and supply has been ascertained in two different scenarios. In the first scenario which is indicated as the normal trend, employment is assumed to grow at the rate estimated in the current study and in the second, it is assumed to grow as per the target set by Ministry of Tourism.

8.7.1 Annual Demand – Supply Gap as per the Normal Trend

Annual demand for employees has been computed from the survey and has been discussed in Chapters 3 – 6 for different segments as well as in 8.5 in this chapter. The survey has estimated this as a proportion of total employment and the same has been assumed for all forecasts. The annual demand comprises 2 components – additional annual requirement generated by growth in employment and wastage. The former is the difference between the employment in 2 successive years while wastage has been computed as the difference between annual demand and additional annual requirement.

In 2011 – 12, the wastage was pegged at 3.66 lakhs which translates to 8.6% of the total employment. Subsequent to the extensive primary survey, a dipstick survey has been carried out among a sample of decision-makers (Appendix 4) in the HR function of hotels and restaurants. Almost 90% of them validated the high wastage, attributing it to the following reason:

- Attractiveness (in terms of remuneration levels) of other emerging services sectors such as infrastructure (airports & real estate), event management, etc.
- Preference for younger people in hospitality

However, the rate of wastage is expected to reduce over the next 10 years and settle to 5.65% in 2021 – 22.

The study has quantified the requirement of trainers in this sector; this will increase at the same rate as the requirement for employees. The number of teachers in future has been estimated assuming that all additional employees need to be trained and that one teacher is required for training 25 persons.

The supply of manpower from Government institutions has been obtained from the Ministry of Tourism which has already estimated the number of persons to be trained under various schemes till 2021-22. The current study has estimated the number of persons that are likely to be trained by private Hotel Management institutes and Travel Trade Institutes. The current survey has also found that there is attrition of 28% among the students trained for this sector; they do not take up hospitality as a career after completing their course.

The details of the calculation for obtaining the demand – supply gap, as per the normal trend, are given in the following table:

Segments	2011 – 12	2016 – 17	2021 – 22
	<i>(Figures in Lakhs)</i>		
Total Employment	42.44	54.69	76.06
Additional Annual Requirement	1.77	2.70	4.86
Wastage (Retirement & Attrition)	3.66	4.13	4.33
Annual Demand for employees (additional+ wastage)	5.43	6.83	9.19
Requirement of Trainers	0.22	0.27	0.37
Total Annual Demand	5.65	7.10	9.56
Supply			
From Government Institutes	0.34	0.62	0.78
From Private Institutes	0.38	0.42	0.50
Total Supply	0.72	1.04	1.28
Attrition (28%)	0.20	0.29	0.36
Net Supply	0.52	0.75	0.92
DEMAND – SUPPLY GAP (at 100% skilled level)	5.13	6.35	8.64
DEMAND – SUPPLY GAP (at 75% skilled level)	3.8	4.8	6.5
DEMAND – SUPPLY GAP (at 50% skilled level)	2.6	3.2	4.3

Study to Assess the Requirement of Manpower in Hospitality and Travel Trade Sector

Against a net demand of 5.65 lakhs in the hospitality sector in 2011 – 12, the supply is 72,000. After accounting for attrition, the net supply works to just 52,000. This amounts to 9%; hence, the current gap between demand and supply of manpower is almost 91%. The survey has also estimated the cumulative workforce, defined as the total current employment or the available stock of manpower. This has been done on the basis of total number of hotels and average number of employees in each, as explained earlier in section 8.3 of this chapter. The survey of hotels indicates that almost 50% of the cumulative workforce in the hotels is trained as against the current supply which is only 9% of the demand.

The above implies that the supply has not kept pace with demand over the last decade. From a situation when almost 100% of the demand was met by trained manpower, now, the supply is a mere 9% of demand. If this is not addressed, the gap between demand and supply will widen further to 8.64 lakhs by the year 2021 – 22.

The gap between demand and supply of non-managerial manpower is likely to be huge in case corrective steps are not taken. There is also going to be a shortfall of almost 62,000 hotel management graduates in this sector; this will almost double by the year 2022.

Annual Employment Supply – Demand Gap (in Lakhs)			
Segments	2011 – 12	2016 – 17	2021 – 22
Total	5.13	6.35	8.64
Managerial	0.62	0.78	1.09
Non-Managerial	4.51	5.58	7.55

8.7.2 Annual Supply – Demand Gap as per Target

Ministry of Tourism has fixed the following target for growth of tourism sector for the next few years.

1. Increase India's share of International Tourist arrivals to at least 1 % by end of 12th Plan; this requires an annual growth of 12.38% during 2011- 2016.
2. Provide adequate facilities for domestic tourism to sustain the growth of 12.16% (witnessed in recent years) during 12th Plan (2011 to 2016).

The requirement of manpower has been estimated for the above mentioned target in the following manner.

- Foreign Tourist Arrivals (FTAs) target 2016 – 11.24 million
- Domestic Tourist Arrivals (DTVs) target 2016 – 1451.46 million
- Combined target for FTAs and DTVs in 2016 – 1462.7 million
- Average employment generated per million tourists (FTAs + DTVs) in 2001-10 – 3176
- Additional number of tourists (FTAs + DTVs) in 2016-17 over 2010 – 11: 728.04 million
- Additional employment likely to be generated for additional tourists in 2016 – 17: 23.12 lakhs
- Total employment in hospitality sector in 2016-17 – 63.79 lakhs as compared to 54.69 lakhs as per normal trend
- Average annual growth in employment during 2011 – 12 to 2016 – 17 is 7.79% as compared to 5.20% as per the normal trend

The annual requirement for employees has been computed in the same manner as in the first scenario – as a fixed proportion of the total employment, estimated by the current study. The computation methodology for the other statistics remains the same. The detailed statistics for obtaining the demand-supply gap as per the target are given in the following table:

Segments	2011 – 12	2016 – 17	2021 – 22
	<i>(Figures in Lakhs)</i>		
Total Employment	43.84	63.79	92.82
Additional Annual Requirement	3.17	4.61	6.71
Wastage (Retirement & Attrition)	2.44	3.36	4.51
Annual Demand (additional+ wastage)	5.61	7.97	11.22
Requirement of Trainers	0.22	0.32	0.45
Total Annual Demand	5.83	8.29	11.66
Supply			
From Government Institutes	0.34	0.62	0.78
From Private Institutes	0.38	0.42	0.50
Total Supply	0.72	1.04	1.28
Attrition (28%)	0.20	0.29	0.36
Net Supply	0.52	0.75	0.92
DEMAND – SUPPLY GAP (at 100% skilled level)	5.32	7.54	10.74
DEMAND – SUPPLY GAP (at 75% skilled level)	3.99	5.66	8.06
DEMAND – SUPPLY GAP (at 50% skilled level)	2.66	3.77	5.37

Annual Employment Supply – Demand Gap (in Lakhs)			
Segments	2011 – 12	2016 – 17	2021 – 22
Total	5.32	7.54	10.74
Managerial	0.64	0.95	1.41
Non-Managerial	4.68	6.59	9.33

8.7.3 Growth Rate in Employment:

The growth rate in employment as per the 2 scenarios discussed earlier - normal trend and as per target is summarized below:

Year	Growth rate in employment	
	As per normal trend	As per target
2011 - 12	--	--
2016 - 17	5.20%	7.79%
2021 - 22	6.82%	7.79%

APPENDIX 1

ESTIMATION PROCEDURE

Estimation Procedure

Definitions:

Accommodation Units:

5 Star & 5 Star Hotels

x_{5i}^{FO} ----- manpower hired in front office in the i th sample

x_{5i}^{FBK} ----- manpower hired in F & B Kitchen in the i th sample

x_{5i}^{FBS} ----- manpower hired in F & B Service in the i th sample

x_{5i}^{HK} ----- manpower hired in Housekeeping in the i th sample

r_5 ----- number of rooms in the sample

R_5 ----- estimated number of rooms in the universe

4 Star Hotels

x_{4i}^{FO} ----- manpower hired in front office in the i th sample

x_{4i}^{FBK} ----- manpower hired in F & B Kitchen in the i th sample

x_{4i}^{FBS} ----- manpower hired in F & B Service in the i th sample

x_{4i}^{HK} ----- manpower hired in Housekeeping in the i th sample

r_4 ----- number of rooms in the sample

R_4 ----- estimated number of rooms in the universe

3 Star Hotels

x_{3i}^{FO} ----- manpower hired in front office in the i th sample

x_{3i}^{FBK} ----- manpower hired in F & B Kitchen in the i th sample

x_{3i}^{FBS} ----- manpower hired in F & B Service in the i th sample

x_{3i}^{HK} ----- manpower hired in Housekeeping in the i th sample

r_3 ----- number of rooms in the sample

R_3 ----- estimated number of rooms in the universe

2 Star Hotels

x_{2i}^{FO} ----- manpower hired in front office in the i th sample

x_{2i}^{FBK} ----- manpower hired in F & B Kitchen in the i th sample

x_{2i}^{FBS} ----- manpower hired in F & B Service in the i th sample

x_{2i}^{HK} ----- manpower hired in Housekeeping in the i th sample

r_2 ----- number of rooms in the sample

R_2 ----- estimated number of rooms in the universe

1 Star Hotels

x_{1i}^{FO} ----- manpower hired in front office in the i th sample

x_{1i}^{FBK} ----- manpower hired in F & B Kitchen in the i th sample

x_{1i}^{FBS} ----- manpower hired in F & B Service in the i th sample

x_{1i}^{HK} ----- manpower hired in Housekeeping in the i th sample

r_1 ----- number of rooms in the sample

R_1 ----- estimated number of rooms in the universe

Heritage Hotels

x_{hi}^{FO} ----- manpower hired in front office in the i th sample

x_{hi}^{FBK} ----- manpower hired in F & B Kitchen in the i th sample

x_{hi}^{FBS} ----- manpower hired in F & B Service in the i th sample

x_{hi}^{HK} ----- manpower hired in Housekeeping in the i th sample

r_h ----- number of rooms in the sample

R_h ----- estimated number of rooms in the universe

Unclassified Hotels

x_{ui}^{FO} ----- manpower hired in front office in the i th sample

x_{ui}^{FBK} ----- manpower hired in F & B Kitchen in the i th sample

x_{ui}^{FBS} ----- manpower hired in F & B Service in the i th sample

x_{ui}^{HK} ----- manpower hired in Housekeeping in the i th sample

r_u ----- number of rooms in the sample

R_u ----- estimated number of rooms in the universe

Guest Houses/ Lodges

x_{gHi}^{FO} ----- manpower hired in front office in the i th sample

x_{gHi}^{FBK} ----- manpower hired in F & B Kitchen in the i th sample

x_{gHi}^{FBS} ----- manpower hired in F & B Service in the i th sample

x_{gHi}^{HK} ----- manpower hired in Housekeeping in the i th sample

r_{gH} ----- number of rooms in the sample

R_{gH} ----- estimated number of rooms in the universe

Motels

x_{mi}^{FO} ----- manpower hired in front office in the i th sample

x_{mi}^{FBK} ----- manpower hired in F & B Kitchen in the i th sample

x_{mi}^{FBS} ----- manpower hired in F & B Service in the i th sample

x_{mi}^{HK} ----- manpower hired in Housekeeping in the i th sample

rm ----- number of rooms in the sample

Rm ----- estimated number of rooms in the universe

Bed & Breakfast units

x_{bi}^{FO} ----- manpower hired in front office in the i th sample

x_{bi}^{FBK} ----- manpower hired in F & B Kitchen in the i th sample

x_{bi}^{FBS} ----- manpower hired in F & B Service in the i th sample

x_{bi}^{HK} ----- manpower hired in Housekeeping in the i th sample

rb ----- number of rooms in the sample

Rb ----- estimated number of rooms in the universe

Others

x_{oi}^{FO} ----- manpower hired in front office in the i th sample

x_{oi}^{FBK} ----- manpower hired in F & B Kitchen in the i th sample

x_{oi}^{FBS} ----- manpower hired in F & B Service in the i th sample

x_{oi}^{HK} ----- manpower hired in Housekeeping in the i th sample

ro ----- number of rooms in the sample

Ro ----- estimated number of rooms in the universe

Eating Outlets:

Restaurants

x_{ri}^{FBK} ----- manpower hired in F & B Kitchen in the i th sample

x_{ri}^{FBS} ----- manpower hired in F & B Service in the i th sample

x_{ri}^S ----- manpower hired in store in the i th sample

ro5 ----- number of seats in the sample

RO5 ----- estimated number of seats in the universe

Sweet Shops

x_{si}^{FBK} ----- manpower hired in F & B Kitchen in the ith sample

x_{si}^{FBS} ----- manpower hired in F & B Service in the ith sample

x_{si}^S ----- manpower hired in store in the ith sample

so5 ----- number of seats in the sample

SO5 ----- estimated number of seats in the universe

Fast Food Outlets

x_{fi}^{FBK} ----- manpower hired in F & B Kitchen in the ith sample

x_{fi}^{FBS} ----- manpower hired in F & B Service in the ith sample

x_{fi}^S ----- manpower hired in store in the ith sample

fo5 ----- number of seats in the sample

FO5 ----- estimated number of seats in the universe

Dhabas

x_{di}^{FBK} ----- manpower hired in F & B Kitchen in the ith sample

x_{di}^{FBS} ----- manpower hired in F & B Service in the ith sample

x_{di}^S ----- manpower hired in store in the ith sample

do5 ----- number of seats in the sample

DO5 ----- estimated number of seats in the universe

Estimation of Accommodation Units:

Estimations of manpower hired by a 5 star and 5 star deluxe hotel

$$\frac{\sum_{i=1}^{n5} (x5i^{FO} + x5i^{FBK} + x5i^{FBS} + x5i^{HK}) * R5}{r5}$$

Note:

Ministry of Tourism’s Data related to star category hotels has been used for estimation

The number of manpower has been estimated for each zone

Similarly the same estimation procedure has been used for different accommodation units

Estimations of unclassified accommodation units

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

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

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

Number of accommodation units in the trade directory in the selected scanned pockets in a city = y

Total number of accommodation units in a city = (x/y)*Z or (x/y)*Y

Note: The maximum figure has been used

Similarly the same estimation procedure has been used for different accommodation units other than star and heritage hotels

Note: As per discussion with local and industry informants, pockets has been divided into 3 types:

High Density

Moderate Density

and Low Density

All pockets falling in the High Density will be covered. Suitable proportion (50%) of pockets falling in Moderate and (25%) low Density category has been covered.

These 3 estimates has been clubbed to get an idea of number of unclassified accommodation units at each zone.

Estimations of total motels on the highways

Number of motels per 100 km = nm
 Motels per km = nm/ 100
 Total length of highways in a zone = H
 Total motels in a zone = nm/ 100 * H

Estimation of Eating Outlets:

Estimations of manpower hired by a restaurant

$$\frac{\sum_{i=1}^{n5} (x5i^{FBK} + x5i^{FBS} + x5i^S) * RO5}{ro5}$$

Note:

The number of manpower has been estimated for each zone

Similarly the same estimation procedure has been used for different eating outlets

Estimations of restaurants in a city

Estimate 1: Number of restaurants from Municipal Corporation/ Economic Census = Z
 Estimate 2: Number of restaurants in the trade directory = Y
 Estimate 3: Number of restaurants in the selected scanned pockets in a city in the market place = x
 Number of restaurants in the trade directory in the selected scanned pockets in a city = y
 Total number of restaurants in a city = (x/y)*Z or (x/y)*Y

Note: The maximum figure has been used. Similarly the same estimation procedure will be used for different eating outlets

*Note: As per discussion with local and industry informants, pockets has been divided into 3 types: High Density; Moderate Density and Low Density
 All pockets falling in the High Density has been covered. Suitable proportion (50%) of pockets falling in Moderate and (25%) low Density category has been covered.
 These 3 estimates has been clubbed to get an idea of no. of Restaurants at each zone.*

Estimations of total restaurants on the highways

Study to Assess the Requirement of Manpower in Hospitality and Travel Trade Sector

Number of restaurants per 100 km = nm
 Restaurants per km = nm/ 100
 Total length of restaurants in a zone = H
 Total restaurants in a zone = (nm/ 100) * H

Estimation of Travel & Trade Units:

*The same estimation procedure has been used for travel and trade units
 To get the exact count of the number on units sources like travel & trade association of India and tour operator association has been used.*

Estimation of Medical & Wellness Units:

*The same estimation procedure has been used for medical & wellness units
 To get the exact count of the number on units sources like Ministry of Health & Family Welfare and directorate of health services has been used.*

Estimation of Manpower Supply:

Hotel Management Institutes

Most IHM and Food Craft Institutes have been covered while in case of private institutes, a sample survey will be done on selected institutes.

Number manpower supplied by IHM and Food craft institutes = a
 Number of manpower supplied by the private institutes in the ith sample = xbi
 Number of private institutes in the sample = p5
 Estimated number of manpower supplied in the universe = P5

$$a + \frac{\sum_{i=1}^{n5} (+ xbi) * P5}{p5}$$

Travel & Trade Institutes

The same estimation procedure has been used for travel & trade institutes

Forecast for the year 2011-12, 2016-2017 and 2021-22

For forecasting of accommodation units, travel & travel units and medical units the growth figures of the tourist statistics has been used.

Forecast for the year 2011-12, 2016-2017 and 2021-22

For forecasting of eating outlets the growth figures of the population has been used.

DATA ANALYSIS AND QUALITY CONTROL MEASURES**Data Analysis:**

The data collected through the survey was computerized using specialized software like MS Excel and FoxPro. For analyzing the computerized data, statistical software “SPSS” was used. The data was analyzed as per the information required by the Market Research Division, Ministry of Tourism.

Our data analysis team develop a statistical model that established the relationship between tourist traffic and employment generated. This was extrapolated to other cities in India.

Quality Control Measures:

1. Before starting the full-scale survey, mock interviews and classroom sessions was carried out to train the executives.
2. Trained executives with prior experience in surveying were used for the survey.
3. Executives who carried out the survey had proper writing skills and proficiency in local and English language.
4. To check the quality of survey, Operations/ Field Manager and Project manager made surprise checks. Back-checks and scrutiny as mentioned earlier helped in maintaining quality of the survey.
5. Each questionnaire was scrutinized by the operations manager as well as executives trained in questionnaire coding and scrutiny.
6. Incomplete questionnaires or logically incorrect questionnaires were rejected and not included in the sample of responses.
7. We carried out a 40% telephonic back check of the filled questionnaire obtained from the survey of accommodation units.
8. All open-ended questions were coded and a code list prepared.

APPENDIX 2

QUESTIONNAIRES

Accommodation Units

MR/10/03/MOT – Manpower Requirement

Good morning/ afternoon. I am _____ from Market Pulse, a reputed marketing research and consulting company. We are currently carrying out a study to determine the manpower requirement in hospitality sector. Our company has been commissioned by Ministry of Tourism to carry out this study. I would be grateful if you could spend some of your valuable time. This feedback will take 15 – 20 minutes.

1. Number of Employees

- 1.1. We would like to know how many permanent employees are employed in different departments of your hotel as on 1st April 2010. I am going to read out the departments one by one. Please tell me how many people are employed in... **READ OUT DEPARTMENTS ONE BY ONE**
- 1.2. Now, please tell us about the number of casual or temporary employees in ...as on 1st April 2010 **READ OUT DEPARTMENTS ONE BY ONE.**
- 1.3. Now tell me, how many fresh graduates and others with no prior work experience were hired between 1st April 2009 – 31st March 2010 in ... **READ OUT DEPARTMENTS ONE BY ONE**
- 1.4. Now tell me, how many trained manpower with prior work experience were hired between 1st April 2009 – 31st March 2010 in ... **READ OUT DEPARTMENTS ONE BY ONE**
- 1.5. What is the attrition rate in...? This refers to the number of people out of every 100 who left your organization between 1st April 2009 – 31st March 2010. **READ OUT DEPARTMENTS ONE BY ONE**

Departments	1.1. Number of Permanent employees	1.2. Number of casual or temporary employees	1.3. Recruitment of fresh graduates & others with no prior work experience	1.4. Recruitment of trained manpower with prior work experience	1.5 Attrition Rate %
	1 st April 2010	1 st April 2010	1 st April 2009 – 31 st March 2010	1 st April 2009 – 31 st March 2010	1 st April 2009 – 31 st March 2010
Administration					
Front Office					
F & B (Service)					
F & B (Kitchen)					
House Keeping					
Accounts					
EDP					
Security					
Sales & Marketing					
Purchase & Stores					
Human Resource					
Public Relation					
Maintenance/ Engineering					
Telephone					
Health Club/ Swimming Pool					
Laundry					

2. Age Profile of Employees

2.1 **FILL UP FROM Q.1.1**

2.2 Now, please tell us how many of your permanent employees are in the age group of 'Less than 30 years/ 30 – 40 years/ 41 – 50 years/ Above 50 years' in ... **ASK FOR EACH DEPARTMENT**

Departments	2.1. Number of employees (FILL UP FROM Q.1.1)	2.2. Number of employees Age-wise (years)			
		Less than 30	31 – 40	41 – 50	More than 50
Administration					
Front Office					
F & B (Service)					
F & B (Kitchen)					
House Keeping					
Accounts					
EDP					
Security					
Sales & Marketing					
Purchase & Stores					
Human Resource					
Public Relation					
Maintenance/ Engineering					
Telephone					
Health Club/ Swimming Pool					
Laundry					
Total					

3. Profile of Employees by Training

Now I would like to know more about some specific departments such as Administration, F & B, front office and housekeeping.

3.1a. Of the total manpower in the administration, please tell me how many managers are there. How many executives are there? How many assistants are there?

3.1b. What is the average salary of ... **ASK FOR EACH LEVEL** in the front office?

3.1c. How many of them are ...? **RECORD NUMBERS**

(3.1a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.1b) Average Salary (Rs.)	(3.1c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
General Manager					
Managers					
Executives					
Assistants					

3.2a. Of the total manpower in the front office, please tell me how many managers are there. How many supervisors are there? How many front office receptionists are there?

3.2b. What is the average salary of ... **ASK FOR EACH LEVEL** in the front office?

3.2c. How many of them are ...? **RECORD NUMBERS**

(3.2a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.2b) Average Salary (Rs.)	(3.2c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
Departmental Head					
Managers					
Receptionists					
Bell Boys					

3.3a. Of the total manpower in F&B service, please tell me how many captains are there? How many stewards are there? How many waiters are there?

3.3b. What is the average salary of ... **ASK FOR EACH LEVEL** in the F&B service?

3.3c. How many of them are ...? **RECORD NUMBERS**

(3.3a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.3b) Average Salary (Rs.)	(3.3c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
Director					
F & B Managers					
Restaurants Managers					
Banquet Manager					
Bar Manager					
Captains					
Stewards					

3.4a. Of the total manpower in the F&B kitchen, please tell me how many chefs are there in your hotel's kitchen and production? How many cooks are there? How many helpers are there?

3.4b. What is the average salary of ... **ASK FOR EACH LEVEL** in the F&B kitchen?

3.4c. How many of them are ...? **RECORD NUMBERS**

(3.4a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.4b) Average Salary (Rs.)	(3.4c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
Executive Chefs					
Demi Chefs					
Sous Chefs					
Commis Chefs 1					
Commis Chefs 2					
Commis Chefs 3					
Trainee Chefs					
Cooks (In case of unclassified accommodation units)					
Helpers					

3.5a. Of the total manpower in housekeeping, please tell me how many managers are there? How many room supervisors are there? How many attendants are there? How many house-men are there?

3.5b. What is the average salary of ... **ASK FOR EACH LEVEL** in the housekeeping?

3.5c. How many of them are ...? **RECORD NUMBERS**

(3.5a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.5b) Average Salary (Rs.)	(3.5c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
Managers					
Housekeeping Executives					
Housekeeping In-charge					
Floor Supervisors					
Room Attendants					
House-men					

3.6 Do you prefer to recruit skilled or unskilled manpower at supervisory or at helper level? Please tell us why. _____

3.7 Please tell us about your selection processes for ... **ASK FOR EACH DEPARTMENT?**

Departments	Types of selection processes
1. Administration	[1] Interview [2] Written test [3] Practical test [4] If any other, please specify_____
2. Front Office	[1] Interview [2] Written test [3] Practical test [4] If any other, please specify_____
3. F & B (Service)	[1] Interview [2] Written test [3] Practical test [4] If any other, please specify_____
4. F & B (Kitchen)	[1] Interview [2] Written test [3] Practical test [4] If any other, please specify_____
5. House Keeping	[1] Interview [2] Written test [3] Practical test [4] If any other, please specify_____

3.8 Please tell us the main method used for hiring manpower for...**SINGLE CODE AND ASK FOR EACH**

DEPARTMENT

3.9 Please tell us the other methods used for hiring manpower for.... **MULTIPLE CODE AND ASK FOR EACH**

DEPARTMENT

Departments	3.8 Main method	3.9 Other Methods
1. Administration	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____
2. Front Office	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____
3. F & B (Service)	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____
4. F & B (Kitchen)	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____
5. House Keeping	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____

4. Required Qualification for Different Departments & Functions

4.1 We would like to know the qualifications that your hotel looks for, when recruiting for ... **READ OUT DEPARTMENTS ONE BY ONE**

Department		Professional qualification	Other Qualifications
1. Administration	General Manager		
	Managers		
	Executives		
	Assistants		
2. Front Office	Departmental Head		
	Managers		
	Receptionists		
	Bell Boys		
3. F & B (Kitchen)	Executive Chefs		
	Demi Chefs		
	Sous Chefs		
	Commis Chefs 1		
	Commis Chefs 2		
	Commis Chefs 3		
	Trainee Chefs		
	Cooks (In case of unclassified accommodation units)		
	Helpers		

4. F & B (Service)	Director		
	F & B Managers		
	Restaurants Managers		
	Banquet Manager		
	Bar Manager		
	Captains		
	Stewards		
5. House Keeping	Managers		
	Housekeeping Executives		
	Housekeeping In-charge		
	Floor Supervisors		
	Room Attendants		
	House-men		

5. Profile of accommodation units

Name of hotel: _____

Type of hotel:

- | | |
|---|--|
| [1] 5 Star Deluxe Hotel | [2] 5 Star Hotel |
| [3] 4 Star Hotel | [4] 3 Star Hotel |
| [5] 2 Star Hotel | [6] 1 Star Hotel |
| [7] Apartment Hotel (Service Apartment) | [8] Heritage Hotel |
| [9] Non-star Hotel | [10] Guest House/ Lodge/ Inn |
| [11] Youth/ YMCA Hostel | [12] Dharamshala / Sarai/ Musafirkhana |
| [13] Gurudwara / Temple/ Monastery | [14] BED & Breakfast Unit |
| [15] Motel | [16] Others _____ |

Ownership:

- | | | |
|---------------------------------|--|---------------------|
| [1] Central Government | [2] State Government | [3] Private Limited |
| [4] Proprietorship/ Partnership | [5] Public Limited | [6] PSU |
| [7] Charitable Trust/ Society | [8] If any other, please specify _____ | |

Air-conditioning: [1] Yes [2] Partly [3] No

Number of rooms: _____

Credit card acceptance: [1] Yes [2] No

Hotel Association Membership: _____ _____ _____ _____

Restaurants: _____

City:

Address:

State:

Type of city: [1] Business Centre [2] Pilgrimage [3] Historical Value
 [4] Hill Station [5] Beach [6] National Park
 [8] Any other _____

Year of Inception:

Please tell us about any expansion plans that your hotel has in this or any other city.

Contact person's name: _____ Designation: _____

Telephone / mobile number: _____

Name of the interviewer: _____ Date: _____

Eating Outlets

MR/10/03/MOT – Manpower Requirement

Good morning/ afternoon. I am _____ from Market Pulse, a reputed marketing research and consulting company. We are currently carrying out a study to determine the manpower requirement in hospitality sector. Our company has been commissioned by Ministry of Tourism to carry out this study. I would be grateful if you could spend some of your valuable time. This feedback will take 15 – 20 minutes.

1. Number of Employees

- 1.6. We would like to know how many permanent employees are employed in different departments of your outlet as on 1st April 2010. I am going to read out the departments one by one. Please tell me how many people are employed in... **READ OUT DEPARTMENTS ONE BY ONE**
- 1.7. Now, please tell us about the number of casual or temporary employees in ...as on 1st April 2010 **READ OUT DEPARTMENTS ONE BY ONE.**
- 1.8. Now tell me, how many fresh graduates and others with no prior work experience were hired between 1st April 2009 – 31st March 2010 in ... **READ OUT DEPARTMENTS ONE BY ONE**
- 1.9. Now tell me, how many trained manpower with prior work experience were hired between 1st April 2009 – 31st March 2010 in ... **READ OUT DEPARTMENTS ONE BY ONE**
- 1.10. What is the attrition rate in...? This refers to the number of people out of every 100 who left your organization between 1st April 2009 – 31st March 2010. **READ OUT DEPARTMENTS ONE BY ONE**

Departments	1.1. Number of Permanent employees	1.2. Number of casual or temporary employees	1.3. Recruitment of fresh graduates & others with no prior work experience	1.4. Recruitment of trained manpower with prior work experience	1.5 Attrition Rate %
	1 st April 2010	1 st April 2010	1 st April 2009 – 31 st March 2010	1 st April 2009 – 31 st March 2010	1 st April 2009 – 31 st March 2010
Administration/ Operations					
F & B Kitchen					
F & B Service					
Store					
Security					
Maintenance					
Delivery					
Accounts					
Total					

1.11. Of all the employees leaving your outlet, what proportion many would be joining ...?

Call centers: ____% Other sectors such as _____: ____%

2. Age Profile of Employees

2.3 **FILL UP FROM Q.1.1**

2.4 Now, please tell us how many of your permanent employees are in the age group of ‘Less than 30 years/ 30 – 40 years/ 41 – 50 years/ Above 50 years’ in ... **ASK FOR EACH DEPARTMENT**

Departments	2.1. Number of employees (FILL UP FROM Q.1.1)	2.2. Number of employees Age-wise (years)			
		Less than 30	31 – 40	41 – 50	More than 50
Administration/ Operations					
Kitchen					
Service					
Store					
Security					
Maintenance					
Delivery					
Accounts					
Total					

3. Profile of Employees by Training

Now I would like to know more about each of certain departments such as kitchen, service and store. Please tell me ...

3.1a. Of the total manpower in the administration, please tell me how many managers are there. How many executives are there? How many assistants are there?

3.1b. What is the average salary of ... **ASK FOR EACH LEVEL** in the front office?

3.1c. How many of them are ...? **RECORD NUMBERS**

(3.1a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.1b) Average Salary (Rs.)	(3.1c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
General Manager					
Managers					
Executives					
Assistants					

3.2a. Of the total manpower in the Kitchen, please tell me how many chefs are there in your outlets's kitchen? How many cooks are there? How many helpers are there?

3.2b. What is the average salary of ... **ASK FOR EACH LEVEL** in the kitchen?

3.2c. How many of them are ...? **RECORD NUMBERS**

(3.2a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.2b) Average Salary (Rs.)	(3.2c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
Number of Chefs					
Number of Supervisors					
Number of Cooks (In case of dhaba)					
Number of Helpers:					

3.3a. Of the total workforce in Service, please tell me how many are hall in charge. How many are captains? How many are butlers? How many are stewards? And how many are waiters?

3.3b. What is the average salary of ... **ASK FOR EACH LEVEL** in the service?

3.3c. How many of them are ...? **RECORD NUMBERS**

(3.3a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.3b) Average Salary (Rs.)	(3.3c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
Number of Managers					
Number of Hall in charge:					
Number of Captains:					
Number of Stewards:					
Number of Waiters:					
Number of Helpers					

3.4a. Of the total workforce in Store, how many are managers? How many are storekeepers and how many are helpers?

3.4b. What is the average salary of ... **ASK FOR EACH LEVEL** in the store?

3.4c. How many of them are ...? **RECORD NUMBERS**

(3.4a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.4b) Average Salary (Rs.)	(3.4c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
Number of Store managers:					
Number of Store Keepers:					
Number of Helpers:					

3.5 Do you prefer to recruit skilled or unskilled manpower at supervisory or at helper level? Please tell us why. _____

3.6 Please tell us about your selection processes for ... **ASK FOR EACH DEPARTMENT?**

Departments	Types of selection processes
1. Administration	[1] Interview [2] Written test [3] Practical test [4] If any other, please specify_____
2. F & B (Service)	[1] Interview [2] Written test [3] Practical test [4] If any other, please specify_____
3. F & B (Kitchen)	[1] Interview [2] Written test [3] Practical test [4] If any other, please specify_____
4. Stores	[1] Interview [2] Written test [3] Practical test [4] If any other, please specify_____

3.7 Please tell us the main method used for hiring manpower for...**SINGLE CODE AND ASK FOR EACH DEPARTMENT**

3.8 Please tell us the other methods used for hiring manpower for.... **MULTIPLE CODE AND ASK FOR EACH DEPARTMENT**

Departments	3.7 Main method	3.8 Other Methods
1. Administration	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____
2. F & B (Service)	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____
3. F & B (Kitchen)	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____
4. Stores	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____

4.1 We would like to know the qualifications that your hotel looks for, when recruiting for ... **READ OUT DEPARTMENTS ONE BY ONE**

Department		Professional qualification	Other Qualifications
1. Administration	General Manager		
	Managers		
	Executives		
	Assistants		
2. F & B (Service)	Managers		
	Hall In-charge		
	Captains		
	Stewards		
	Waiters		
	Helpers		
3. F & B (Kitchen)	Chefs		
	Supervisors		
	Cooks		
	Helpers		
4. Stores	Managers		
	Store Keeper		
	Helper		

Study to Assess the Requirement of Manpower in Hospitality and Travel Trade Sector

5. Profile of eating outlet

Restaurant Name: _____

City: _____

Address: _____

State: _____

Restaurant Category: [1] Oriental [2] Mughlai [3] Fast Food
 [4] Multi Cuisine [5] South Indian [6] Specialty
 [7] Any other _____

Ownership: [1] Partnership [2] Proprietorship [3] Private limited
 [4] Public limited [5] Government owned [6] Any other _____

Air-conditioning: [1] Yes [2] No

Seating capacity: _____

Credit card acceptance: [1] Yes [2] No

Association Membership: _____

Liquor Served: [1] Yes [2] No

Banquet facilities: [1] Yes [2] No

Facilities: [1] Free Home Delivery [2] Any Other facility (*please specify*)

Date of inception of the restaurant: _____

Please tell us about any expansion plans that your unit has in this or any other city.

Contact person's name: _____

Designation: _____

Telephone / mobile number: _____

=====
 ===

Name of the interviewer: _____ Date: _____

Name of the scrutinizer: _____ Back check: _____

Name of field officer: _____

Medical & Wellness Units

MR/10/03/MOT – Manpower Requirement

Good morning/ afternoon. I am _____ from Market Pulse, a reputed marketing research and consulting company. We are currently carrying out a study to determine the manpower requirement in hospitality sector. Our company has been assigned by Ministry of Tourism to carry out this study. I would be grateful if you could spend some of your valuable time. This feedback will take 15 – 20 minutes.

Please tell us the business areas that your company operates in.

[1] Medical Unit [2] Wellness Unit [3] If any other, please specify _____

1. Number of Employees:

- 1.12. We would like to know how many permanent employees are employed in different departments of your organisation as on 1st April 2010. I am going to read out the departments one by one. Please tell me how many people are employed in... **READ OUT DEPARTMENTS ONE BY ONE**
- 1.13. Now, please tell us about the number of casual or temporary employees in ...as on 1st April 2010 **READ OUT DEPARTMENTS ONE BY ONE.**
- 1.14. Now tell me, how many fresh graduates and others with no prior work experience were hired between 1st April 2009 – 31st March 2010 in ... **READ OUT DEPARTMENTS ONE BY ONE**
- 1.15. Now tell me, how many trained manpower with prior work experience were hired between 1st April 2009 – 31st March 2010 in ... **READ OUT DEPARTMENTS ONE BY ONE**

1.16. What is the attrition rate in...? This refers to the number of people out of every 100 who left your organization between 1st April 2009 – 31st March 2010. **READ OUT DEPARTMENTS ONE BY ONE**

Departments	1.1. Number of Permanent employees	1.2. Number of casual or temporary employees	1.3. Recruitment of fresh graduates & others with no prior work experience	1.4. Recruitment of trained manpower with prior work experience	1.5. Attrition Rate %
	1 st April 2010	1 st April 2010	1 st April 2009 – 31 st March 2010	1 st April 2009 – 31 st March 2010	1 st April 2009 – 31 st March 2010
Administration					
Facilitation Cell (International Patients)					
Front Office					
F & B (Kitchen)					
F & B (Service)					
House Keeping					
Accounts/ Billing					
EDP					
Security					
Sales & Marketing					
Purchase & Stores					
Human Resource					
Public Relation					
Maintenance/ Engineering					
Telephone					
Laundry					
Total					

1.17. Of all the employees leaving your organization, what proportion many would be joining ...?

Call centers: ____% Other sectors such as _____: ____%

2. Age Profile of Employees

2.5 **FILL UP FROM Q.1.1**

2.6 Now, please tell us how many of your permanent employees are in the age group of 'Less than 30 years/ 30 – 40 years/ 41 – 50 years/ Above 50 years' in ... **ASK FOR EACH DEPARTMENT**

Departments	2.1. Number of employees (FILL UP FROM Q.1.1)	2.2. Number of employees Age-wise (years)			
		Less than 30	31 – 40	41 – 50	More than 50
Administration					
Facilitation Cell					
Front Office					
F & B (Kitchen)					
F & B (Service)					
House Keeping					
Accounts/ Billing					
EDP					
Security					
Sales & Marketing					
Purchase & Stores					
Human Resource					
Public Relation					
Maintenance/ Engineering					
Telephone					
Laundry					
Total					

3. Profile of Employees by Training

Now I would like to know more about some specific departments such as facilitation cell front office, F & B Kitchen and housekeeping.

3.1a. Of the total manpower in the Administration, please tell me how many managers are there. How many coordinators are there?

3.1b. What is the average salary of ... **ASK FOR EACH LEVEL** in the front office?

3.1c. How many of them are ...? **RECORD NUMBERS**

(3.1a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.1b) Average Salary (Rs.)	(3.1c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
Number of Managers					
Number of Coordinators					

3.2a. Of the total manpower in the front office, please tell me how many managers are there. How many supervisors are there? How many front office assistants are there?

3.2b. What is the average salary of ... **ASK FOR EACH LEVEL** in the front office?

3.2c. How many of them are ...? **RECORD NUMBERS**

			Formally trained at the institute before joining (training period 6 weeks or more)	(3.2a) Type of manpower	Number 1 st April 2009 – 31 st March 2010
Number of Managers:					
Number of Supervisors:					
Number of Executives					

3.3a. Of the total manpower in the F&B kitchen, please tell me how many chefs are there in your hotel's kitchen and production? How many cooks are there? How many helpers are there?

3.3b. What is the average salary of ... **ASK FOR EACH LEVEL** in the F&B kitchen?

3.3c. How many of them are ...? **RECORD NUMBERS**

(3.3a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.3b) Average Salary (Rs.)	(3.3c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
Number of Chefs:					
Number of Supervisors					
Number of Helpers					
Number of Dietitian					

3.4a. Of the total manpower in F&B service, please tell me how many captains are there? How many stewards are there? How many waiters are there?

3.4b. What is the average salary of ... **ASK FOR EACH LEVEL** in the F&B service?

3.4c. How many of them are ...? **RECORD NUMBERS**

(3.4a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.4b) Average Salary (Rs.)	(3.4c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
Director					
F & B Managers					
Restaurants Managers					
Captains					
Stewards					
Helpers					

3.5a. Of the total manpower in housekeeping, please tell me how many managers are there? How many room supervisors are there? How many attendants are there? How many house-men are there?

3.5b. What is the average salary of ... **ASK FOR EACH LEVEL** in the housekeeping?

3.5c. How many of them are ...? **RECORD NUMBERS**

(3.5a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.5b) Average Salary (Rs.)	(3.5c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
Number of Managers:					
Number of Supervisors:					
Number of Sweepers					

3.6 Do you prefer to recruit skilled or unskilled manpower at supervisory or at helper level? Please tell us why. _____

3.7 Please tell us about your selection processes for ... **ASK FOR EACH DEPARTMENT?**

Departments	Types of selection processes			
1. Facilitation Cell	[1] Interview specify _____	[2] Written test	[3] Practical test	[4] If any other, please
2. Front Office	[1] Interview specify _____	[2] Written test	[3] Practical test	[4] If any other, please
3. F & B (Kitchen)	[1] Interview specify _____	[2] Written test	[3] Practical test	[4] If any other, please
4. F & B (Service)	[1] Interview specify _____	[2] Written test	[3] Practical test	[4] If any other, please
5. House Keeping	[1] Interview specify _____	[2] Written test	[3] Practical test	[4] If any other, please

3.8 Please tell us the main method used for hiring manpower for...**SINGLE CODE AND ASK FOR EACH**

DEPARTMENT

3.9 Please tell us the other methods used for hiring manpower for.... **MULTIPLE CODE AND ASK FOR EACH**

DEPARTMENT

Departments	3.8 Main method	3.9 Other Methods
1. Facilitation Cell	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____
2. Front Office	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____
3. F & B (Kitchen)	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____
3. F & B (Service)	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____
4. House Keeping	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____

4. Required Qualification for Different Departments & Functions

4.1 We would like to know the qualifications that your hotel looks for, when recruiting for ... **READ OUT DEPARTMENTS ONE BY ONE**

Department		Professional qualification	Other Qualifications
Facilitation Cell	Managers		
	Coordinators		
Front Office	Managers		
	Supervisors		
	Executives		
F & B (Kitchen)	Chefs:		
	Supervisors		
	Helpers		
	Dietitian		
F & B (Service)	Director		
	F & B Managers		
	Restaurants Managers		
	Captains		
	Stewards		
	Helpers		
House Keeping	Managers		
	Supervisors		
	Sweepers		

5. Profile of organization

Name:

Address:

City:

State:

Telephone No.:

Please tell us about any expansion plans that your organization has in this or any other city. _____

Contact person's name: _____

Designation:

Telephone / mobile number: _____

=====

===

Name of the interviewer: _____ Date: _____

Name of the scrutinizer: _____ Back check: _____

Name of field officer: _____

Tour & Travel

MR/10/03/MOT – Manpower Requirement

Good morning/ afternoon. I am _____ from Market Pulse, a reputed marketing research and consulting company. We are currently carrying out a study to determine the manpower requirement in hospitality sector. Our company has been commissioned by Ministry of Tourism to carry out this study. I would be grateful if you could spend some of your valuable time. This feedback will take 15 – 20 minutes.

Please tell us the business areas that your company operates in.

- [1] Travel Agency [2] Tour Operator [3] Adventure Tour Operator
- [4] Tourist Transport Operator [5] Airlines Companies [6] E-portals
- [7] If any other, please specify _____

1. Number of Employees:

- 1.18. We would like to know how many permanent employees are employed in different departments of your organization as on 1st April 2010. I am going to read out the departments one by one. Please tell me how many people are employed in... **READ OUT DEPARTMENTS ONE BY ONE**
- 1.19. Now, please tell us about the number of casual or temporary employees in ...as on 1st April 2010 **READ OUT DEPARTMENTS ONE BY ONE.**
- 1.20. Now tell me, how many fresh graduates and others with no prior work experience were hired between 1st April 2009 – 31st March 2010 in ... **READ OUT DEPARTMENTS ONE BY ONE**
- 1.21. Now tell me, how many trained manpower with prior work experience were hired between 1st April 2009 – 31st March 2010 in ... **READ OUT DEPARTMENTS ONE BY ONE**

1.22. What is the attrition rate in...? This refers to the number of people out of every 100 who left your organization between 1st April 2009 – 31st March 2010. **READ OUT DEPARTMENTS ONE BY ONE**

Departments	1.1. Number of Permanent employees	1.2. Number of casual or temporary employees	1.3. Recruitment of fresh graduates & others with no prior work experience	1.4. Recruitment of trained manpower with prior work experience	1.5. Attrition Rate %
	1 st April 2010	1 st April 2010	1 st April 2009 – 31 st March 2010	1 st April 2009 – 31 st March 2010	1 st April 2009 – 31 st March 2010
Administration/ Operations					
Ticketing					
Foreign Exchange					
Tours					
Sales & Marketing					
Accounts					
Facilitation (Visa documentation)					
Total					

2. Age Profile of Employees

2.7 **FILL UP FROM Q.1.1**

2.8 Now, please tell us how many of your permanent employees are in the age group of ‘Less than 30 years/ 30 – 40 years/ 41 – 50 years/ Above 50 years’ in ... **ASK FOR EACH DEPARTMENT**

Departments	2.1. Number of employees (FILL UP FROM Q.1.1)	2.2. Number of employees Age-wise (years)			
		Less than 30	31 – 40	41 – 50	More than 50
Administration/ Operations					
Ticketing					
Foreign Exchange					
Tours					
Sales & Marketing					
Accounts					
Facilitation (Visa documentation)					
Total					

3. Profile of Employees by Training

Now I would like to know more about some of the departments.

3.1a. Of the total manpower in the administration, please tell me how many managers are there. How many executives are there? How many assistants are there?

3.1b. What is the average salary of ... **ASK FOR EACH LEVEL** in the front office?

3.1c. How many of them are ...? **RECORD NUMBERS**

(3.1a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.1b) Average Salary (Rs.)	(3.1c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
General Manager					
Managers					
Executives					
Assistants					

3.2a. Of the total manpower in the ticketing, please tell me how many managers are there. How many executives are there? How many front office assistants are there?

3.2b. What is the average salary of ... **ASK FOR EACH LEVEL** in the ticketing?

3.2c. How many of them are ...? **RECORD NUMBERS**

(3.2a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.2b) Average Salary (Rs.)	(3.2c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
Number of Managers:					
Number of Executives:					
Assistants					

3.3a. Of the total manpower in the tours, please tell me how many managers are there. How many executives are there? How many front office assistants are there?

3.3b. What is the average salary of ... **ASK FOR EACH LEVEL** in the tours?

3.3c. How many of them are ...? **RECORD NUMBERS**

(3.3a) Type of manpower	Number 1 st April 2009 – 31 st March 2010	(3.3b) Average Salary (Rs.)	(3.3c.) Type of training		
			Formally trained at the institute before joining (training period 6 weeks or more)	Trained on job in this organization (training period 6 weeks or more)	Untrained
Number of Managers:					
Number of Executives:					
Assistance					
Guides					
Drivers					

3.4 Do you prefer to recruit skilled or unskilled manpower at supervisory or at helper level? Please tell us why. _____

3.5 Please tell us about your selection processes for ... **ASK FOR EACH DEPARTMENT?**

Departments	Types of selection processes
Administration	[1] Interview [2] Written test [3] Practical test [4] If any other, please specify _____
Ticketing	[1] Interview [2] Written test [3] Practical test [4] If any other, please specify _____
Tours	[1] Interview [2] Written test [3] Practical test [4] If any other, please specify _____

3.6 Please tell us the main method used for hiring manpower for...**SINGLE CODE AND ASK FOR EACH**

DEPARTMENT

3.7 Please tell us the other methods used for hiring manpower for.... **MULTIPLE CODE AND ASK FOR EACH**

DEPARTMENT

Departments	3.6 Main method	3.7 Other Methods
1. Administration	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____
2. Ticketing	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____
3. Tours	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____	[1] Campus recruitment [2] Advertisements [3] Placement consultants [4] If any other, please specify_____

4. Required Qualification for Different Departments & Functions

4.1 We would like to know the qualifications that your hotel looks for, when recruiting for ... **READ OUT DEPARTMENTS ONE BY ONE**

Department		Professional qualification	Other Qualifications
1. Administration	General Manager		
	Managers		
	Executives		
	Assistants		
2. Ticketing	Managers		
	Supervisors		
	Assistants		
3. Tours	Managers		
	Executives		
	Assistance		
	Guides		
	Drivers		

5. Profile of the company

Name of the company:

Address:

City:

State:

Telephone No.:

Year of inception:

Contact person's name: _____

Designation:

Telephone / mobile number: _____

=====

===

Name of the interviewer: _____ Date: _____

Name of the scrutinizer: _____ Back check: _____

Name of field officer: _____

Institute: Hotel Management and Travel & Tour Management

MR/10/03/MOT – Manpower Requirement

Good morning/ afternoon. I am _____ from Market Pulse, a reputed marketing research and consulting company. We are currently carrying out a study to determine the manpower requirement in hospitality sector. Our company has been commissioned by Ministry of Tourism to carry out this study. I would be grateful if you could spend some of your valuable time. This feedback will take 15 – 20 minutes.

Type of institute: [1] Hotel management

[2] Travel & Tour management

1. What types of courses are offered by your institute?

S. No.	Name of the course	Degree/ diploma	Subjects Studied
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

2. Number of students graduating per year (*specific number*)

3. In 2009 - 2010, how many students were placed in the industry for each course?

Courses	Q2			Q3
	2007 - 2008	2008 - 2009	2009 - 2010	Placement 2009 - 2010
Course 1				
Course 2				
Course 3				
Course 4				
Course 5				
Course 6				
Course 7				
Course 8				
Course 9				
Course 10				

4. Please tell us the % of students who got placed in different sectors for each course.

5. What was the average starting salary?

Courses	Q4 (% of students who got placed)	Q5 (average starting salary) Rs.
Course 1	[1] Hotels _____ [2] Restaurants _____ [3] If any other, please specify _____	
Course 2	[1] Hotels _____ [2] Restaurants _____ [3] If any other, please specify _____	
Course 3	[1] Hotels _____ [2] Restaurants _____ [3] If any other, please specify _____	
Course 4	[1] Hotels _____ [2] Restaurants _____ [3] If any other, please specify _____	
Course 5	[1] Hotels _____ [2] Restaurants _____ [3] If any other, please specify _____	
Course 6	[1] Hotels _____ [2] Restaurants _____ [3] If any other, please specify _____	
Course 7	[[1] Hotels _____ [2] Restaurants _____ [3] If any other, please specify _____	
Course 8	[[1] Hotels _____ [2] Restaurants _____ [3] If any other, please specify _____	
Course 9	[1] Hotels _____ [2] Restaurants _____ [3] If any other, please specify _____	
Course 10	[1] Hotels _____ [2] Restaurants _____ [3] If any other, please specify _____	

6. Are you planning to introduce new degree/diploma courses in future?

7. Is there any future expansion plan (In terms of opening new institutes or increasing the total size of the students): -

8. What is the total number of permanent faculty in your institute? _____

9. What is the total number of visiting faculty in your institute? _____

10. What is the average salary of your faculty? Rs. _____

12. What percentage of your faculty is with qualification in hospitality?

[1] PhD _____% [2] Post Graduate _____% [3] Graduate _____% [4] If any other, please specify _____%

13. What percentage of your faculty is with qualification in tourism?

[1] PhD _____% [2] Post Graduate _____% [3] Graduate _____% [4] If any other, please specify _____%

14. What percentage of your faculty is having teaching work experience?

[1] 0 – 3 years _____% [2] 3 – 5 years _____% [3] 5 – 7 years _____% [4] More than 7 years _____%

15. What percentage of your faculty is?

[1] Less than 25 years _____% [2] 26 - 35 years _____% [3] 36 – 45 years _____% [4] More than 46 years _____%

Name of the Institute: _____

Address: _____

City: _____

State: _____

Telephone No.: _____

Contact person details:

Name: _____

Designation: _____

Telephone / mobile number: _____

=====

Name of the interviewer: _____ Date: _____

Name of the scrutinizer: _____ Back check: _____

Name of field officer: _____

APPENDIX 3

ANNUAL DEMAND & SUPPLY ESTIMATION

Annual Demand & Supply Estimation Normal Trend (in lakhs)											
Year	Total employment	Annual Addition	Wastage	Annual Recruitment	Requirement of the trainer	Total annual requirement	Supply from MoT	Supply from Pvt. Sector	Total Supply	Less Attrition (28%)	gap
2010	38.98		3.48					0.36	0.36	0.26	
2011	40.67	1.69	3.57	5.26	0.21	5.47	0.27	0.37	0.64	0.46	5.01
2012	42.44	1.77	3.66	5.43	0.22	5.64	0.34	0.38	0.72	0.52	5.13
2013	44.65	2.21	3.75	5.96	0.24	6.20	0.39	0.39	0.78	0.56	5.64
2014	46.97	2.32	3.84	6.16	0.25	6.41	0.45	0.40	0.85	0.61	5.80
2015	49.41	2.44	3.94	6.38	0.26	6.63	0.51	0.40	0.91	0.66	5.98
2016	51.99	2.57	4.03	6.60	0.26	6.87	0.54	0.41	0.95	0.69	6.18
2017	54.69	2.70	4.13	6.83	0.27	7.10	0.62	0.42	1.04	0.75	6.35
2018	58.42	3.73	4.17	7.90	0.32	8.21	0.65	0.43	1.08	0.78	7.43
2019	62.40	3.98	4.21	8.19	0.33	8.52	0.68	0.45	1.13	0.81	7.71
2020	66.66	4.26	4.25	8.50	0.34	8.84	0.72	0.47	1.19	0.85	7.99
2021	71.20	4.55	4.29	8.83	0.35	9.19	0.74	0.48	1.22	0.88	8.31
2022	76.06	4.86	4.33	9.19	0.37	9.56	0.78	0.50	1.28	0.92	8.64

Annual Demand & Supply Estimation - Target Trend (in lakhs)											
Year	Total employment	Annual Addition	Wastage	Annual Recruitment	Requirement of the trainer	Total annual requirement	Supply from MoT	Supply from Pvt. Sector	Total Supply	Less Attrition (28%)	gap
2010	38.98		3.4	5.03	0.20	5.23	0.27	0.36	0.63	0.45	4.78
2011	40.67	1.69	3.53	5.23	0.21	5.44					
2012	43.84	3.17	2.44	5.61	0.22	5.83	0.34	0.38	0.72	0.52	5.32
2013	47.26	3.42	2.60	6.02	0.24	6.26					
2014	50.94	3.68	2.77	6.46	0.26	6.71					
2015	54.91	3.97	2.96	6.93	0.28	7.20					
2016	59.18	4.28	3.15	7.43	0.30	7.72					
2017	63.79	4.61	3.36	7.97	0.32	8.29	0.62	0.42	1.04	0.75	7.54
2018	68.76	4.97	3.56	8.53	0.34	8.87					
2019	74.12	5.36	3.78	9.13	0.37	9.50					
2020	79.89	5.77	4.00	9.78	0.39	10.17					
2021	86.12	6.22	4.25	10.47	0.42	10.89					
2022	92.82	6.71	4.51	11.22	0.45	11.66	0.78	0.50	1.28	0.92	10.74

APPENDIX 4

LIST OF CONTACTS FOR ATTRITION RATE

List of Contacts for Attrition Rate

1. Mr. Debashish Chandra, General Manager, Hotel Radisson – Ph: 7686272777
2. Mr. Nakul Bhata , Director, Hotel Eddison, Gurgaon – Ph: 4266677
3. Mr. Harkirat Sandhu, General Manager, Khyber Continental, Amritsar, Ph: 9316868028
4. Mr. S S Sengupta, Dy. General Manager, Hotel Executive Tower, Kolkata, Ph: 9831039593
5. Mr. James Sylvester, Group HR Manager, Minerva Grand, Secunderabad, Ph: 9866302017
6. Mr. T Gopalakrishanan, General Manager, Hotel Soorya International, Pondicherry, Ph: 8939262744
7. Mr. Amit Karoli, HR Manager, Eros Inter Continental, New Delhi, Ph: 41331752
8. Mr. Satyendra Kumar, AGM, Hotel Kiranshree Parico, Guwahati, Ph: 9706098008
9. Mr. Rabindra Nanda, General Manager, Hotel Shree Hari, Ph: 9861190770
10. Mr. Akas Chaudhary, HR Manager, The Claridges, New Delhi, Ph: 9650988660
11. Mr. Khayum, General Manager, Hotel President, Mysore, Ph: 9845371525
12. Mr. P S Parman, HR Incharge, Maiden’s Hotel, New Delhi, Ph: 9717999540
13. Mr. Ramesh Goswami, Manager-Personnel & Admin, Hotel Broadway, New Delhi, Ph: 43663600
14. Mr. Randeep Singh Walia, General Manager, Hotel Neelam, Jaipur, Ph: 9829198684
15. Mr. Chandan Khurana, Director, Shilpy Hospitality Services, New Delhi, Ph: 9810743980
16. Mr. Sukhendu Basu, Manager HR, Hotel Sahara, Mumbai Ph: 9930128382
17. Mr. Kailash Pandey, Manager, Bikanerwala, New Delhi, Ph: 9310787803
18. Mr. Sharad Kini, HR Manager, Grand Sarovar Premier, Mumbai, Ph:9920641209
19. Mr. Dinesh Gupta, Manager HR, Hotel Ramda Plaza, New Delhi, Ph:43555555
20. Ms. Neha Bajaj, HR, Hotel Hans, New Delhi Ph: 9999708898
21. Mr. Aditya Mishra, HR, The Uppal, New Delhi, Ph: 9899986044
22. Mr. Suresh Sakpal, HR Manager, VITS Mumbai, Ph: 9987573955
23. Mohd. Qamar Siddique, HR Manager, Country Inn, Gurgaon, Ph: 9711874008
24. Mr. Derick D’Souza. GM, Marigold Residency, Mumbai, Ph: 9820583227