

**INDIA TOURISM
STATISTICS 2004**



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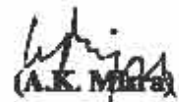
FOREWORD

The adequacy, credibility and timeliness of the data generated by the statistical system are very important for the purpose of policy formulation and for effective monitoring of the progress of programmes. It is in this context that the Department of Tourism has been bringing out an annual publication named India Tourism Statistics which is well received both by the Planners/Policy makers/researchers in the field of tourism and the tourism industry as a whole.

It is my pleasure to present the India Tourism Statistics 2004, which is the 47th Publication in the series. The publication covers several subject areas organized into twelve chapters. Chapter one gives an overview of Indian and World Tourism trends. Chapters two, three and four give the statistics and analysis of inbound, outbound and domestic tourism trends. The other chapters are devoted to statistics relating to the number of approved hotels, travel/ trade agencies, training institutions besides giving a gist of some of the important surveys/ studies conducted by the Department recently. For greater facility of the industry and intending entrepreneurs, guidelines for approval/ classification of hotels, recognition of travel agents/tour operators etc. have been added as appendices.

I hope that the Travel and Tourism industry, tourism officials, researchers and others interested in tourism would find the publication useful. We would welcome suggestions for any improvement in this publication in future.

I convey my appreciation to the officers and staff of Market Research Division of the Department of Tourism as well as the National Informatics Centre, who were responsible for its compilation, and, at the same time, expect that they reduce the time lag in bringing out the next edition.

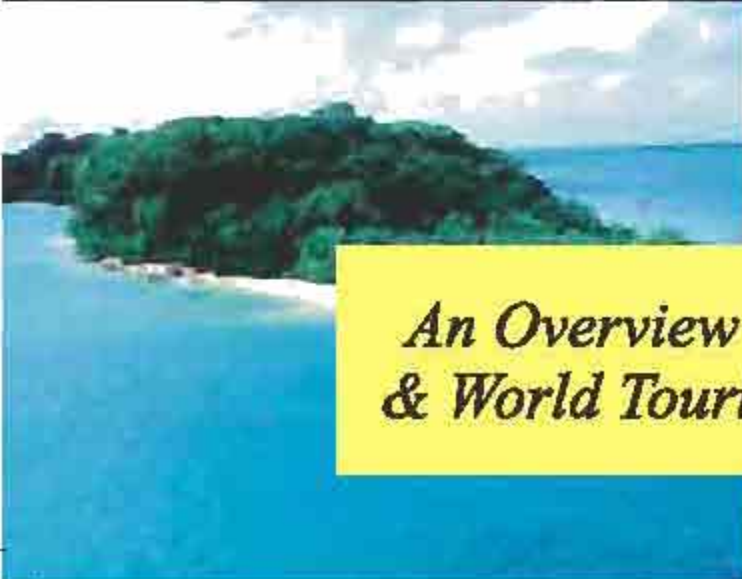

(A.K. Misra)

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*An Overview of Indian
& World Tourism Trends*

1
CHAPTER

AN OVERVIEW OF INDIAN & WORLD TOURISM TRENDS

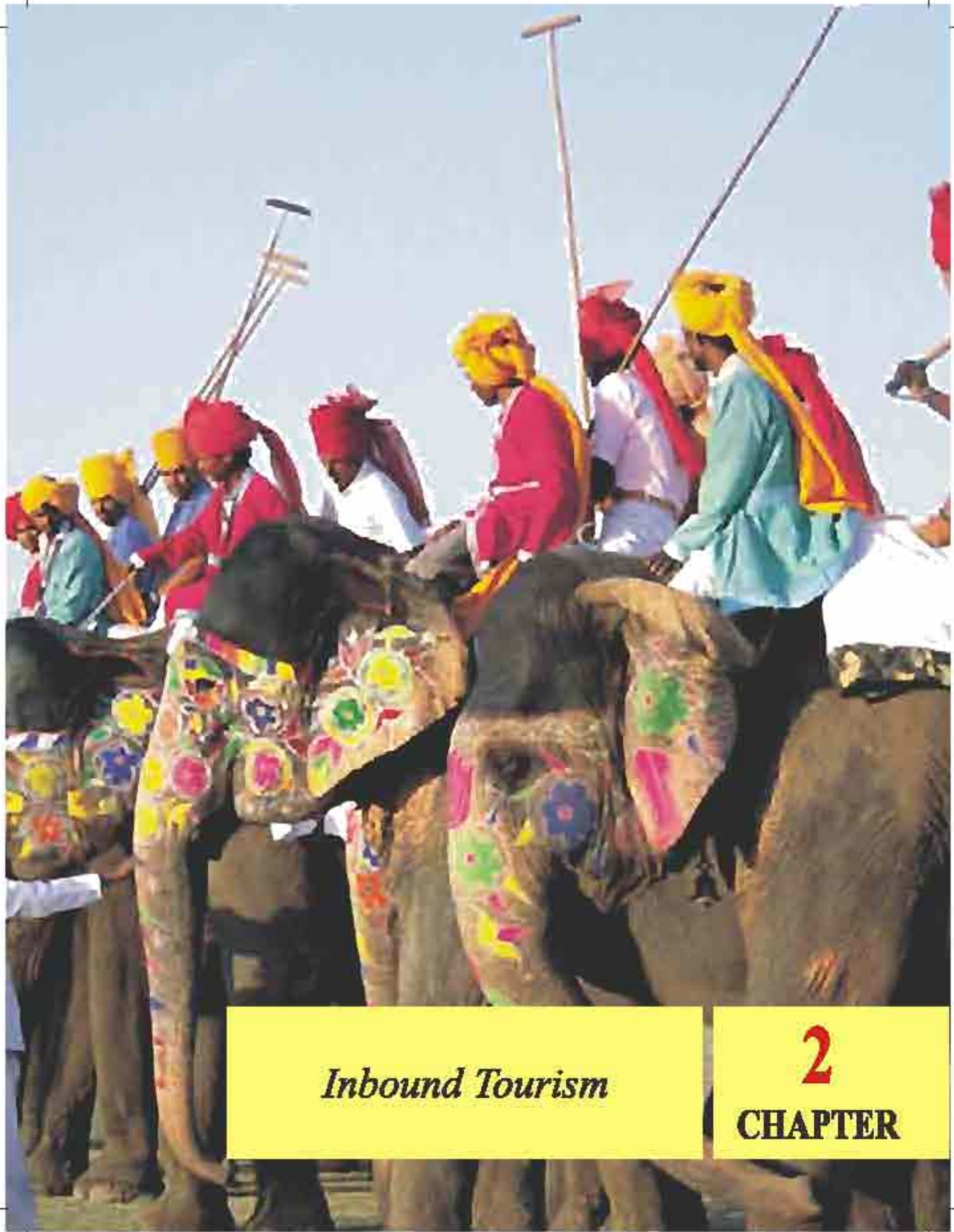
INDIA TOURISM (Calendar Year 2004)

1. FOREIGN TOURIST ARRIVALS (Numbers)	3457477
i) Tourists other than the nationals of Pakistan and Bangladesh	2912615
ii) Tourists of Bangladesh nationality	477446
iii) Tourists of Pakistan nationality	67416
2. SEA CRUISE PASSENGERS	54832
3. ARRIVALS BY MODE OF TRANSPORT (Percentage)	
i) Air	85.6
ii) Land	13.9
iii) Sea	0.5
4. ARRIVALS BY PORT OF ENTRY (Percentage)	
i) Delhi	32.2
ii) Mumbai	25.1
liii) Chennai	10.3
iv) Haridaspur	9.1
v) Dabolim	4.1
vi) Bangalore	4.1
vii) Kolkatta	3.3
viii) Others	11.8
5. ARRIVALS FROM TOP FIFTEEN MARKETS (Number)	
i) U.K.	555907
ii) USA	526120
iii) CANADA	135884
iv) FRANCE	131824
v) SRI LANKA	128711
vi) GERMANY	116679
vii) JAPAN	96851
viii) MALAYSIA	84390
ix) AUSTRALIA	81608

x)	ITALY	65561
xi)	SINGAPORE	60710
xii)	NEPAL	51534
xiii)	NETHERLANDS	51211
xiv)	KOREA (S)	47835
xv)	SPAIN	42895
6.	INDIAN NATIONALS GOING ABROAD(Number)	6212809
7.	NUMBER OF DOMESTIC TOURIST VISITS IN THE COUNTRY (In Million)	366
8.	APPROVED HOTELS	
i)	No. of Hotels	1892
ii)	No. of Rooms	97770
iii)	Room occupancy (Percentage)	65.1
9.	TRAVEL TRADE (Number)	
i)	Travel Agencies	223
ii)	Tour Operators	308
iii)	Tourist Transport Operators	175
iv)	Adventure Tour Operators	13
10.	FOREIGN EXCHANGE RECEIPTS FROM TOURISM	
i)	In Rs. million	216030
ii)	In US\$ million	4769

WORLD TOURISM 2004

1.	World Tourist Arrivals (Million)	762.5
2.	Share of India in World Tourist Arrivals (Percentage)-2004	0.45
3.	India's rank in World Tourist Arrivals-2004	47th
4.	World Tourism Receipts (US\$ Billion)	622
5.	Share of India in World Tourism receipts (Percentage)-2004	0.77
6.	India's rank in World Tourism Receipts-2004	35th



Inbound Tourism

2
CHAPTER

2.1 HIGHLIGHTS

1. Tourist Arrivals

International tourist arrivals in the country in 2004 were 3457477 as compared to 2726214 in 2003, registering an increase of 26.8 per cent. Arrivals from different regions as well as from different countries in South Asia are indicated below:

TABLE 2.1.1

INTERNATIONAL TOURIST ARRIVALS IN INDIA

	2002		2003		2004	
		% Share		% Share		% Share
Total Tourist Arrivals in India	2384364		2726214		3457477	
Arrivals from Region/Country		% Share		% Share		% Share
North America	441780	18.5	518474	19.0	662004	19.1
C&S America	17672	0.7	21654	0.8	28165	0.8
Western Europe	726783	30.5	847966	31.1	1128297	32.6
Eastern Europe	40628	1.7	55252	2.0	82426	2.4
Africa	83457	3.5	93353	3.4	115493	3.3
West Asia	92562	3.9	103596	3.8	122808	3.6
South East Asia	149291	6.3	168926	6.2	209110	6.0
East Asia	115424	4.8	150506	5.5	201627	5.8
Australasia	63261	2.7	73849	2.7	100944	2.9
South Asia	630653	26.4	666889	24.5	790698	22.9
Afghanistan	6012	0.3	10079	0.4	12705	0.4
Iran	11815	0.5	17539	0.6	24733	0.7
Maldives	18826	0.8	18345	0.7	21099	0.6
Nepal	43056	1.8	42771	1.6	51534	1.5
Pakistan	2946	0.1	10364	0.4	67416	1.9
Bangladesh	435867	18.3	454611	16.7	477446	13.8
Sri Lanka	108008	4.5	109098	4.0	128711	3.7
Bhutan	4123	0.2	4082	0.1	7054	0.2

Source:-Bureau of Immigration

Further, the following table gives the summary of international tourist traffic to India during the years 1951 to 2004.

TABLE 2.1.2
FOREIGN TOURIST ARRIVAL TO INDIA

Year	Arrivals	
	Number	% Change
1951	16829	-
1960	123095	24.7*
1970	280821	8.6*
1980	1253694	16.1*
1990	1707158	3.1*
1991	1677508	-1.7
1992	1867651	11.3
1993	1764830	-5.5
1994	1886433	6.9
1995	2123683	12.6
1996	2287860	7.7
1997	2374094	3.8
1998	2358629	-0.7
1999	2481928	5.2
2000	2649378	6.7
2001	2537282	-4.2
2002	2384364	-6.0
2003	2726214	14.3
2004	3457477	26.8

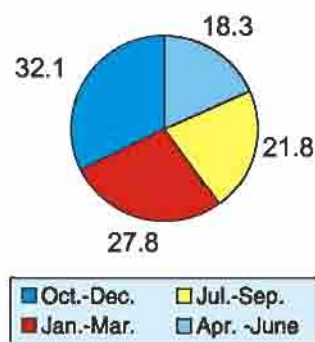
* Average annual growth

Source:- Bureau of Immigration

2. Time of Visit

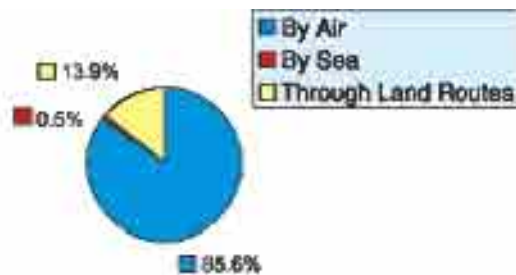
Tourist arrivals during 2004 were the highest during the month of December and lowest during May. Maximum number of Tourist arrived during the months of October to December, constituting 32.1 per cent, followed by January to March constituting 27.8 per cent, July to September constituting 21.8 per cent and April to June constituting 18.3 per cent.

Arrivals during the winter months of 2004 comprising January to March and October to December were 59.9% during 2004 compared to 59.6% during 2003.



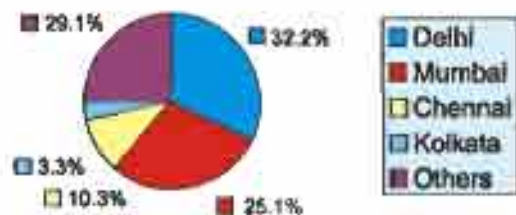
3. Mode of Transport

Air continued to be the predominant mode of travel for the tourists coming to India during 2004 and constituted 85.6 per cent of the total traffic. Arrivals by sea were negligible and the share of arrivals through land routes was 13.9 per cent comprising Bangladesh, Pakistan and Nepal.



4. Port of Entry

Delhi continued to be the major port of entry during 2004 with 32.2% tourists disembarking followed by Mumbai with 25.1%. The arrivals at Chennai, Dabolim, Bangalore and Kolkata air ports constituted 10.3 per cent, 4.1 per cent and 3.3 per cent respectively. Haridaspur a land check post accounted for 9.1 per cent.



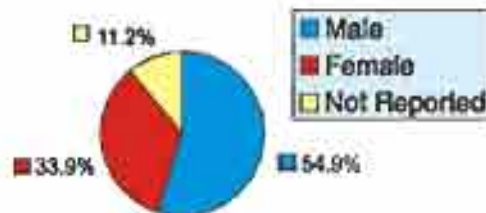
5. Age Distribution

Tourists in the age-group of 35-44 years dominated the arrivals during the year 2004 (21.3 per cent) followed by those in the age-group of 45-54 years (19.4 per cent) and 25-34 years (18.8 per cent).



6. Distribution of Tourists by Gender

Of the total tourist arrivals during 2004, 11.2 per cent did not report their gender. Of the remaining 88.8%, while 54.9 per cent were male, 33.9 per cent were female.

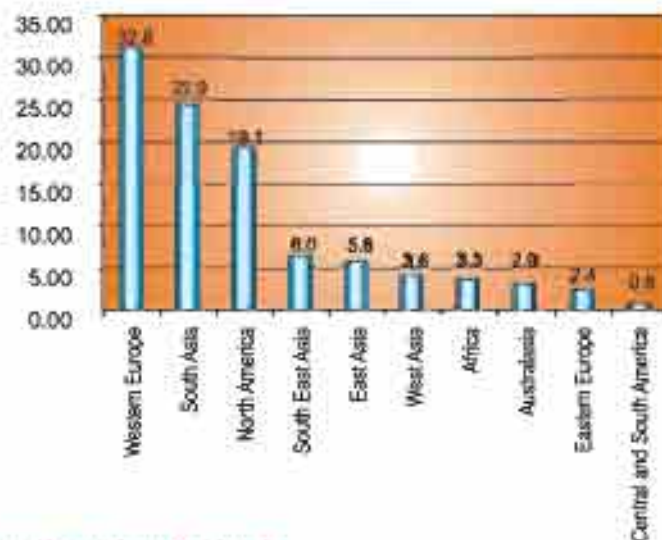


7. Length of Stay

The estimated average length of stay of foreign tourist as per the International Passenger Survey 2003 is 16 days. The total tourist days are estimated to be 55319632 during 2004 as compared to 43619424 during 2003 showing a growth of 27 per cent.

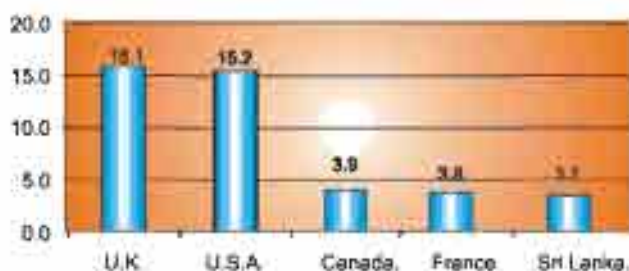
8. Region-wise Arrivals

During the year 2004, Maximum number of tourists arrived from Western Europe constituting 32.6 per cent followed by South Asia (22.9 per cent), North America (19.1 per cent), South East Asia (6.0 per cent), East Asia (5.8 per cent), West Asia (3.6 per cent), Africa (3.3 per cent), Australasia (2.9 per cent), Eastern Europe (2.4 per cent) and Central and South America (0.8 per cent).



9. Nationality-wise Arrivals

United Kingdom nationals continued to occupy the top position with 555907 tourist arrivals in India during 2004, and accounted for 16.1 per cent of the total tourist arrivals. This was followed by USA with 526120 tourist arrivals constituting 15.2 per cent. Tourists from Canada, France, Sri Lanka, Germany, Japan, Malaysia, Australia, Italy, Singapore, Nepal, Netherlands, Korea (s), and Spain each constituted between 3.9 and 1.2 per cent of the total tourist traffic during 2004.



10. Top Fifteen Markets for India

During 2004, all the fifteen tourist generating countries, registered positive growth. Maximum increase was registered in the case of Germany (51.8 per cent), followed by Spain (40.4 per cent), Italy (39.8 per cent), Australia (39.0 per cent), France (35.0 per cent), Korea(s) (34.4 per cent), UK (29.0 per cent), USA (28.1 per cent), Canada & Netherlands (26.2 per cent each), Singapore (25.5 per cent), Japan (24.2 per cent each), Nepal (20.5 per cent), Malaysia (19.3 per cent), and Sri Lanka (18.0 per cent). Arrivals from top 15 countries in 2003 and 2004 with percentage change are given in the following table:

TOURIST ARRIVALS FROM TOP FIFTEEN COUNTRIES DURING THE YEAR 2004 WITH COMPARISON FOR THE YEAR 2003

Country of Nationality	Tourist Arrivals 2003	% to the total	Country of Nationality	Tourist Arrivals 2004	% to the total	% change 2004/2003
UK	430917	15.8	UK	555907	16.1	29.0
USA	410803	15.1	USA	526120	15.2	28.1
CANADA	107671	3.9	CANADA	135884	3.9	26.2
FRANCE	97654	3.6	FRANCE	131824	3.8	35.0
SRI LANKA	109098	4.0	SRI LANKA	128711	3.7	18.0
GERMANY	76868	2.8	GERMANY	116679	3.4	51.8
JAPAN	77996	2.9	JAPAN	96851	2.8	24.2
MALAYSIA	70750	2.6	MALAYSIA	84390	2.4	19.3
AUSTRALIA	58730	2.2	AUSTRALIA	81608	2.4	39.0
ITALY	46908	1.7	ITALY	65561	1.9	39.8
SINGAPORE	48368	1.8	SINGAPORE	60710	1.8	25.5
NEPAL	42771	1.6	NEPAL	51534	1.5	20.5
NETHERLANDS	40565	1.5	NETHERLANDS	51211	1.5	26.2
KOREA(S)	35584	1.3	KOREA(S)	47835	1.4	34.4
SPAIN	30551	1.1	SPAIN	42895	1.2	40.4

Source:- Bureau of Immigration

2.2 TRENDS IN TOURIST ARRIVALS - COUNTRY WISE ANALYSIS

The Foreign tourist arrival to India, which was 1.22 million in 1981 has reached a level of 3.46 million during 2004 showing an average annual growth of 4.3 percent. Following graph presents the trend for the last 20 years . Trend of tourist arrivals for the top 15 countries for the year 2004 for the period 1981 to 2004 is given in Annexure at the end of this Section and also presented nationality-wise below;

1. United Kingdom.

United Kingdom remained on the top of all tourist generating countries for India with 555907 tourist arrivals during the year 2004. As compared to 116684 arrivals during 1981, the average compound rate of growth was 7.0 per cent per annum from 1981 to 2004. Year-wise tourist arrivals from UK are given at the end of this chapter in Annexure. The following graph exhibits yearly trends in the tourist arrivals from this country.



During the year 2004, about 98.6 per cent of the U.K. nationals came by air and 0.7 per cent through land routes. So far as port of disembarkation is concerned maximum number (34.3 per cent) disembarked at Mumbai airport followed by Delhi (30.7 per cent), Chennai (4.8 per cent) and Kolkata (2.5 per cent).

Of the total U.K. nationals who arrived in India, 10.8 per cent have not reported their gender while 50.9 per cent were male and 38.3 per cent female. The most predominant age group was 45-54 with 20.7 per cent of the tourists followed by the age groups 35-44 and 55-64 with 18.3 per cent and 15.7 per cent tourists respectively.

The maximum number of arrivals were recorded during winter months of October to December (34.5) and January to March (32.9 per cent) respectively.

While 97.6 per cent of the U.K. nationals visited India for the purposes of "tourism & others", 1.9 per cent came for business.

2. United States of America.

United States of America is presently the second largest market for India, though it occupied the top position till 1973. The arrivals grew from 82052 in 1981 to 526120 in 2004 at a compound growth rate of 8.2 per cent per annum. The following graph shows the yearly trends in the tourist arrivals from this country.



During 2004, about 98.9 per cent of the American tourists came by air and 0.5 per cent by land. As far as port of disembarkation is concerned maximum number (35.7 per cent) disembarked at Mumbai airport followed by Delhi (31.9 per cent), Chennai (8.4 per cent) and Kolkata (2.8 per cent).

Of the total American nationals who arrived in India, 11.2 per cent did not report their gender while 51.3 per cent were male and 37.5 per cent female. The dominant age-group among them was 45-54 years (18.9 per cent) followed by the age-group 0-14 years (18.3 per cent) and 35-44 years (17.9 per cent) respectively.

The maximum number of tourists arrived during October to December which accounted for 34.0 per cent of the total tourist arrivals from USA, followed by January-March (25.9 per cent).

While 96.8 per cent of US nationals visited India for "tourism & other" purposes, 2.6 per cent came for business.

3. Canada

Canada occupied the third position among the tourist generating countries for India in 2004 improving over its 4th position in 2003. The tourist traffic to India from Canada has grown since 1981 at a compound growth rate of 7.6 per cent per annum. The arrivals from this country during 2004 were 135884 as compared to 25358 during 1981. The year 2004 witnessed an increase of 26.2 per cent over 2003. Year-wise arrivals from Canada are given in Annexure at the end of this Chapter. The following graph shows the yearly trends in the tourist arrivals from this country.



The share of Canada in the total tourist traffic to India was about 3.9 per cent during 2004.

About 98.7 per cent of the Canadian tourists visited India by air and 0.6 per cent by land during 2004. So far as port of disembarkation is concerned, maximum number (62.5 per cent) disembarked at Delhi airport followed by Mumbai (20.1 per cent), Chennai (6.3 per cent) and Kolkata (2.2 per cent).

Of the total Canadian nationals who arrived in India, 24.1 per cent did not report their gender while 42.8 per cent were male and 33.1 per cent female. The predominant age-group was 35-44 years with 16.9 per cent, followed by the age group 45-54 years (16.8 per cent), and 0-14 years (15.5 per cent).

The period October-December 2004 accounted for 37.8 per cent of the arrivals, followed by the period January to March with 32.2 per cent.

Of the total tourists from Canada 97.9 per cent visited India for "tourism & other" purposes, and 1.5 per cent for business.

4. France

France occupied the 4th position among the tourist generating countries for India in 2004 improving over its 5th position in 2003 and constituted about 3.8 per cent of the foreign tourist arrivals in India during 2004. The arrivals grew from 57272 in 1981 to 131824 in 2004 at a compound growth rate of 3.7 per cent. Year-wise arrivals from France are given in Annexure at the end of this Chapter. The following graph shows the trend since 1981.



During 2004, about 98.8 per cent of the French tourists used air route to visit India and 1.0 per cent used land route. So far as port of disembarkation is concerned, maximum number (47.7 per cent) disembarked at Delhi, airport followed by Chennai (21.6 per cent), Mumbai (21.2 per cent) and Kolkata (1.5 per cent).

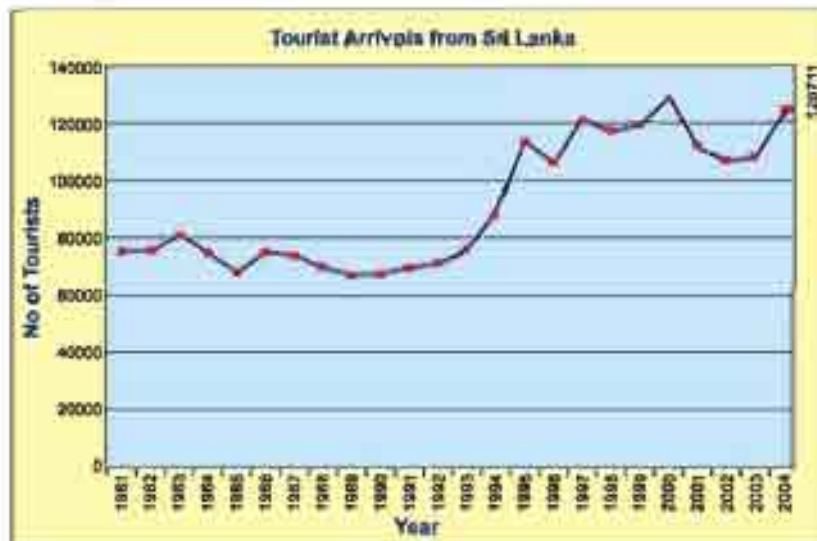
Of the total French nationals who arrived in India, 15.8 per cent did not report their gender while 46.6 per cent were male and 37.6 per cent female. The age group 45-54 years accounted for 21.3 per cent followed by age group 35-44 with 18.5 per cent, and age groups 25-34 & 55-64 years with 18.2 per cent each.

The periods October to December and January to March were the most popular period of visit for the French tourists, constituting 29.7 per cent, and 29.5 per cent arrivals respectively.

97.4 per cent of French nationals visited India for "tourism & other" purposes, and 2.2 per cent came for business.

5. Sri Lanka

Sri Lanka occupied the 5th position among the tourist generating countries for India in 2004 moving down from 3rd position in 2003 and constituted about 3.7 per cent of the total tourist arrivals during 2004. Arrivals from Sri Lanka which were 75842 in 1981 grew upto 128711 in 2004 at a compound growth rate of 2.3 per cent per annum. Year-wise arrivals are given in Annexure at the end of the chapter. The following graph shows the yearly trends since 1981 in the tourist arrivals from this country.



The peak period of Sri Lankan tourists visiting India was the third quarter from July to September constituting 30.1 per cent, followed by the fourth quarter from October to December with 25.8 per cent during 2004. About 99.3 percent of the tourists traveled by air and 0.6 per cent came to India by land. So far as port of disembarkation is concerned, maximum number (65.1 per cent) disembarked at Chennai airport followed by Delhi (4.2 per cent), Mumbai (3.9 per cent) and Kolkata (0.2 per cent)

Out of the total Sri Lankans who arrived in India, 1.6 per cent did not report their gender while 60.0 per cent were male and 38.4 per cent female. The dominant age-group was 35-44 years with 20.4 per cent followed by the age-groups 45-54 years and 25-34 years (18.2 per cent each).

98.3 per cent of Sri Lanka nationals visited India for "tourism and other" purposes and about 1.2 per cent came for business.

6. Germany

Germany occupied the sixth position amongst the tourist generating countries for India in 2004 improving over its Seventh position in 2003 and constituted about 3.4 per cent of the foreign tourist arrivals in India during 2004. The arrivals grew from 55471 in 1981 to 116679 in 2004 at a compound growth rate of 3.3 per cent. Year-wise arrivals are given in Annexure at the end of this chapter. The following graph shows the yearly trends in the tourist arrivals from this country since 1981.



The most preferred mode of transport for travel to India by the German tourists during 2004 was air and it accounted for 96.1 per cent of the arrival, while 2.4 per cent used sea routes. So far as port of disembarkation is concerned, maximum number (45.6 per cent) disembarked at Delhi airport, followed by Mumbai (28.4 per cent), Chennai (8.1 per cent) and Kolkata (2.9 per cent).

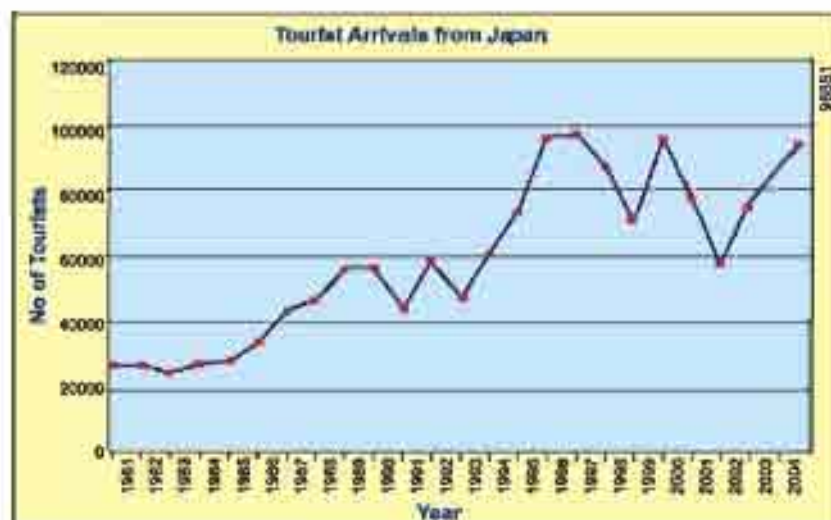
Of the total German nationals who arrived in India, 14.7 per cent did not report their gender while 54.6 per cent were male and 30.7 per cent female. The age group 35-44 years dominated the arrivals from this country with 26.2 per cent, followed by 45-54 years with 21.0 per cent.

The maximum number of Germans visited this country during the period October to December accounting for 33.3 per cent followed by January to March which accounted for 31.2 per cent.

94.9 per cent of German nationals visited India for 'tourism and other' purposes and 4.5 per cent came for business.

7. Japan

Japan is one of the most important tourist generating markets of India in the East, and it constituted about 2.8 per cent of the foreign tourist arrivals to India during 2004. It grew from 29032 in 1981 to 96851 in 2004 at a compound growth rate of 5.4 per cent. Year-wise arrivals are given in Annexure at the end of this Chapter. The following graph shows the yearly trends in the tourist arrivals from this country since 1981.



During the year, about 95.9 per cent of tourists from Japan came to India by air and 2.7 per cent by land routes. So far as port of disembarkation is concerned, maximum number (57.8 per cent) disembarked at Delhi airport followed by Mumbai (17.1 per cent), Chennai (6.4 per cent) and Kolkata (6.2 per cent).

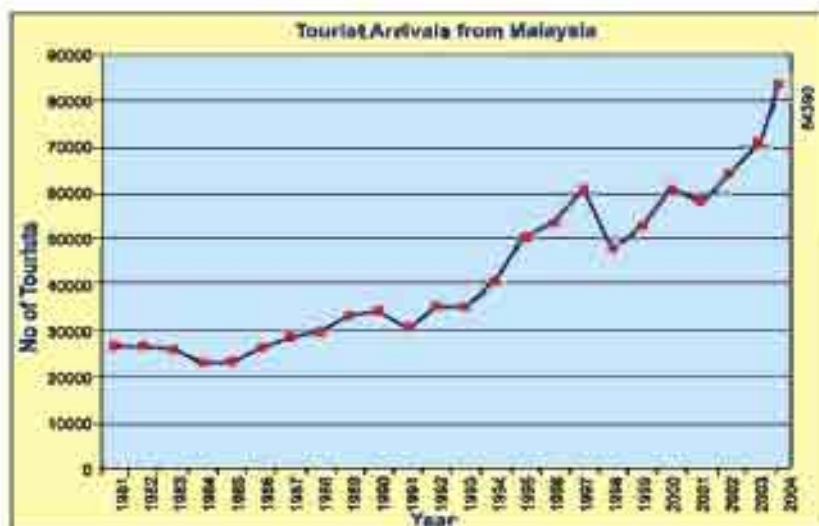
Of the total Japanese nationals who arrived in India, 17.9 per cent did not report their gender while 55.2 per cent were male and 26.9 per cent female. The dominant age-group of these tourists was 25-34 years (21.8 per cent) followed by the age group of 35-44 years (19.0 per cent).

The maximum Japanese tourists i.e., 29.9 per cent arrived during the period January-March followed by period October to December with 26.7 per cent.

93.8 per cent of Japanese nationals visited India for "tourism & other" purposes and 5.1 per cent visited for business.

8. Malaysia

The tourist traffic from Malaysia which during 1981 was merely 26458 increased to 84390 in 2004 with a compound growth rate of about 5.2 per cent per annum. Year-wise arrivals are given in Annexure at the end of this chapter. The following graph shows the yearly trends in the tourist arrivals from this country since 1981.



The contribution of Malaysian tourists to the total tourist traffic to India was 2.4 per cent in 2004. The air was predominant mode of transport of Malaysian tourists, constituting 99.5 per cent of the total arrivals. So far as port of disembarkation is concerned, maximum number (53.8 per cent) disembarked at Chennai airport followed by Delhi (19.2 per cent), Mumbai (10.4 per cent) and Kolkata (1.9 per cent)

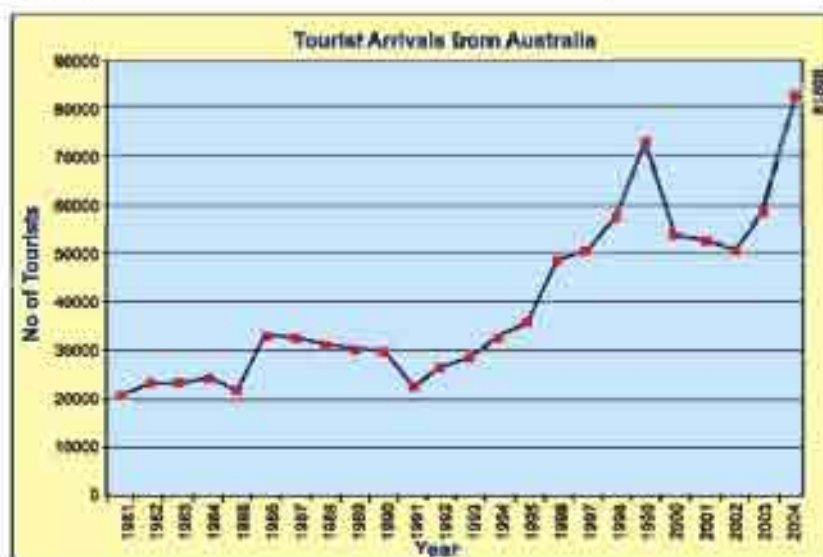
Of the total Malaysian nationals who arrived in India, 7.0 per cent did not report their gender while 58.5 per cent were male and 34.5 per cent female. The dominant age-group was 35-44 years accounting for 23.6 per cent of the total arrivals followed by the age-group 45-54 years with 21.3 per cent.

The maximum number of tourists from Malaysia came to India during the period October-December 2004, constituting about 38.1 per cent followed by the period January to March with 24.0 per cent.

97.2 per cent tourists from Malaysia visited India for "tourism and other" purposes and 1.9 per cent came for business.

9. Australia

During 2004, Australia occupied the 9th position among top fifteen tourist generating markets for India. The tourist traffic from Australia during 1981 was 20940 which increased to 81608 in 2004 with a compound growth rate of 6.1 per cent per annum. Year-wise arrivals are given in Annexure at the end of this chapter. The following graph shows the yearly trends in the tourist arrivals from this country since 1981.



The contribution of Australian tourists to the total traffic to India was about 2.4 per cent in 2004.

The air was predominant mode of transport for Australian tourists constituting 97.7 per cent of the total arrivals, and 1.5 per cent came by land routes. So far as port of disembarkation is concerned, maximum number (34.0 per cent) disembarked at Delhi airport followed by Mumbai (31.6 per cent), Chennai (12.4 per cent) and Kolkata (4.8 per cent).

Of the total Australian national arrivals to India, 12.0 per cent did not report their gender while 53.0 per cent were male and 35.0 per cent female. The dominant age group were 45-54 years accounting for 21.9 per cent of the total tourists arrivals followed by the age group 35-44 years with 21.3 per cent.

The maximum number of Australian tourists came to India during October to December 2004, constituting about 41.1 per cent followed by the period January to March with 25.0 per cent.

96.1 per cent Australian tourists visited India for "tourism and other" purposes and 3.2 per cent came for business.

10. Italy

The arrivals from Italy grew from 28503 in 1981 to 65561 in 2004 at a compound growth rate of 3.7 per cent annum. Year-wise arrivals are given in Annexure at the end of this chapter. The following graph shows the yearly trends in the tourist arrivals from this country since 1981.



The contribution of Italian tourist to the total tourist arrivals in India was 1.9 per cent in 2004.

The predominant mode of transport used by Italian nationals was air, constituting about 99.0 per cent to the total tourist arrivals. About 0.9 per cent tourists came through land routes. So far as port of disembarkation is concerned, maximum number (47.9 per cent) disembarked at Delhi airport followed by Mumbai (26.7 per cent), Chennai (9.3 per cent) and Kolkata (2.3 per cent).

Of the total Italian national arrivals in India, 17.4 per cent did not report their gender while 47.7 per cent were male and 34.9 per cent female. The age-group which dominated the arrivals during 2004 was 35-44 years accounting for 24.4 of the arrivals, followed by the age-group 45-54 years with 23.0 per cent.

The quarter October to December 2004 accounted for maximum number of arrivals constituting 33.8 per cent, followed by the quarter January to March with 27.1 per cent.

97.0 per cent tourists from Italy visited India for "tourism & other" purposes and 2.6 per cent came for business.

11. Singapore

The arrivals from Singapore grew from 17950 in 1981 to 60710 in 2004 at a compound growth rate of about 5.4 per cent per annum. Year-wise arrivals are given in Annexure at the end of this chapter. The graph shows the yearly trends in tourist arrivals from this country since 1981.



The contribution of tourists with Singapore nationality to the total tourist arrivals in India was 1.8 per cent in 2004.

The predominant mode of transport for tourists from Singapore was air, constituting about 99.5 per cent of the total tourist arrivals. So far as port of disembarkation is concerned, maximum number (35.1 per cent) disembarked at Chennai airport followed by Delhi (21.9 per cent), Mumbai (19.6 per cent) and Kolkata (3.3 per cent).

Of the total Singapore nationals who arrived in India, 7.9 per cent did not report their gender while 59.4 per cent were male and 32.7 per cent female. The age-group which dominated the arrivals was 35-44 years accounting for 28.0 per cent of the arrivals followed by the age-group 45-54 years with 22.0 per cent during 2004.

The quarter October to December 2004 accounted for maximum number of arrivals constituting 35.3 per cent followed by the quarter January to March with 22.9 per cent.

95.1 per cent tourists from Singapore visited India for "tourism & other" purposes and 4.3 per cent came for business.

12. Nepal

The arrivals grew from 11851 in 1981 to 51534 in 2004 at a compound growth rate of about 6.6 per cent per annum. Year-wise tourist arrivals are given at the end of this chapter in Annexure. The following graph exhibits yearly trends in the tourist arrivals from this country since 1981.



The contribution of Nepali tourists during 2004 to the total tourist traffic to India was about 1.5 per cent. Air was the predominant mode of transport for Nepalese tourists constituting 97.9 per cent of the total arrivals with only 2.1 per cent tourists coming through land routes. So far as port of disembarkation is concerned, maximum number (75.9 per cent) disembarked at Delhi airport followed by Mumbai (7.9 per cent), Kolkata (6.2 per cent) and Chennai (0.5 per cent).

Of the total Nepali nationals who arrived in India, 25.3 per cent did not report their gender, while 53.2 per cent were male and 21.5 per cent female. The dominated age group was 25-34 years, accounting for 24.5 per cent of total arrivals followed by the age group 35-44 years with 22.5 per cent.

The maximum number of tourists from Nepal came to India during October to December 2004 constituting 31.6 per cent followed by the period July to September 2004 constituting 24.5 per cent. 96.9 per cent of the Nepal nationals visited India for "tourism and other" purposes and about 1.6 per cent came for business.

13. Netherlands

The arrivals from Netherlands grew from 10780 in 1981 to 51211 in 2004 at a compound growth rate of about 7.0 per cent per annum. Year-wise arrivals are given in Annexure at the end of this chapter. The graph shows the yearly trends in tourist traffic from this country since 1981.



The contribution of Netherland tourists during 2004 to the total tourist traffic to India was about 1.5 per cent. The predominant mode of transport used by Netherland tourists was Air, constituting 97.4 per cent of the total arrivals and 2.3 per cent came through land routes. So far as port of disembarkation is concerned, maximum number (52.1 per cent) disembarked at Delhi airport, followed by Mumbai (27.6 per cent), Chennai (7.9 per cent) and Kolkata (2.1 per cent).

Of the total Netherlands national arrivals in India, 20.7 per cent did not report their gender while 47.6 per cent were male and 31.7 per cent female. The dominant age group was 35-44 years accounting for 23.0 per cent of total arrivals followed by the age group 45-54 years with 22.3 per cent.

The maximum number of tourist from Netherlands came to India during October to December 2004 constituting about 33.1 per cent, followed by the period January to March with 28.3 per cent.

96.6 per cent of the Netherland nationals visited India for "tourism & other" purposes and about 3.0 per cent came for business.

14. Korea (South)

Korea (South) occupied the 14th position among the tourist generating countries for India and constituted about 1.4 per cent of the foreign tourist arrivals in India during 2004. The arrivals grew from 2665 in 1981 to 47835 in 2004 at a compound growth rate of 13.4 per cent. Year-wise arrivals are given in Annexure at the end of this chapter. The graph below shows the yearly trends in the tourists traffic from this country.



The peak period of Korean (South) tourists was the first quarter from January to March 2004 constituting 35.3 per cent, followed by fourth quarter from October to December with 27.2 per cent during 2004. 96.4 per cent of the tourists from South Korea travelled to India by air and 3.5 per cent by land routes during 2004. So far as port of disembarkation is concerned, maximum number (47.3 per cent) disembarked at Delhi airport followed by Mumbai (24.8 per cent), Chennai (12.3 per cent) and Kolkata (5.1 per cent).

Of the total Korean nationals who arrived in India, 16.8 per cent did not report their gender while 55.5 per cent were male and 27.7 per cent female. The dominant age group was 35-44 years, accounting for 26.4 per cent of total arrivals, followed by age group 25-34 years with 23.5 per cent.

95.2 per cent from Korea (South) visited India for "tourism & other" purposes and about 3.0 per cent came for business.

15. Spain

Spain occupied the 15th position among the tourists generating countries for India during 2004 and constituted about 1.2 per cent of the foreign tourist arrivals during the year. The arrivals grew from 10504 in 1981 to 42895 in 2004 at a compound growth of rate of 6.3 per cent. Year-wise arrivals are given in Annexure at the end of this chapter. The following graph shows yearly trends in tourist traffic from this country since 1981.



During 2004, about 99.0 per cent of Spanish tourists used air route to visit India and 0.9 per cent used land routes. So far as port of disembarkation is concerned, maximum number (63.1 per cent) disembarked at Delhi airport followed by Mumbai (17.8 per cent), Chennai (5.9 per cent) and Kolkata (4.1 per cent).

Of the total Spanish nationals who arrived in India, 23.1 per cent did not report their gender while 38.6 per cent were male and 38.3 per cent female. The period July to September was the most popular period of visit for the Spanish tourists, constituting 42.6 per cent, followed by the period October to December with 28.4 per cent. The age group 25-34 years accounted for 32.3 per cent of arrivals from Spain, followed by age group 35-44 years with 23.5 per cent.

98.0 per cent of Spanish nationals visited India for "tourism and other" purposes and 1.7 per cent came for business.

Note: For the purpose of this analysis in section 2.2 of chapter 2, the purpose of visit as "Tourism" means recreation holidays & leisure etc.

ANNEXURE

**TOURIST ARRIVALS TO INDIA FROM TOP FIFTEEN COUNTRIES DURING
1981 TO 2004**

Year	U.K.	U.S.A	Canada	France	Sri Lanka	Germany	Japan	Malaysia	Australia	Italy
	1	2	3	4	5	6	7	8	9	10
1981	116684	82052	25358	57272	75842	55471	29032	26458	20940	28503
1982	120772	86806	25991	59267	76143	50885	29103	26552	23395	29791
1983	136823	95847	29857	50158	81716	52120	26662	25796	23436	27947
1984	124205	95651	25135	47148	75449	48930	29566	22993	24546	23570
1985	119544	95920	29022	44091	69063	45738	30573	23265	22047	23187
1986	160685	125364	39837	65948	75631	64811	36402	26209	33264	38548
1987	166590	134876	37677	64432	74351	72300	46240	28480	32883	41151
1988	200509	122888	37498	69799	70640	77543	49244	29635	31462	47612
1989	229496	134314	40306	78001	67680	78812	58707	33120	30443	50751
1990	235151	125303	41046	79496	68400	71374	59122	34278	30076	49194
1991	212052	117332	36142	69346	70088	72019	46655	30617	22700	41129
1992	244263	152288	43386	74304	71935	84422	60137	35201	26646	51138
1993	274168	158159	47800	70694	76898	83340	49616	35334	28795	40315
1994	300696	176482	56441	73088	89009	85352	63398	40762	33142	43510
1995	334827	203343	63821	82349	114157	89040	76042	50039	36150	53015
1996	360686	228829	74031	93325	107351	99853	99018	53370	48755	49910
1997	370567	244239	78570	91423	122080	105979	99729	60401	50647	53854
1998	376513	244687	80111	97898	118292	93993	89565	47496	57807	54058
1999	345085	251926	82892	85891	120072	85033	73373	52613	73041	50677
2000	432644	348292	84013	100022	129193	83881	98159	60513	53995	50419
2001	405472	329147	88600	102434	112813	80011	80634	57869	52691	41351
2002	387846	348182	93598	78194	108008	64891	59709	63748	50743	37136
2003	430917	410803	107671	97654	109098	76868	77996	70750	58730	46908
2004	555907	526120	135884	131824	128711	116679	96851	84390	81608	65561

Source :- Bureau of Immigration

Year	Singapore	Nepal	Netherlands	Korea (South)	Spain
	11	12	13	14	15
1981	17950	11851	10780	2665	10504
1982	19026	12115	10724	4110	10106
1983	21252	12001	11358	3139	10221
1984	19204	13401	12101	3078	7532
1985	18485	15883	13158	3939	7578
1986	24189	13957	15297	1767	14266
1987	26380	16965	18819	2990	16481
1988	27565	19715	21327	3572	16116
1989	29377	19116	22716	3895	20016
1990	32570	20814	24353	3986	18567
1991	28383	21834	19845	3967	13644
1992	35039	25244	30145	5171	24850
1993	40223	28048	30856	4791	20353
1994	44157	34732	35094	7227	21436
1995	48632	34562	40147	9831	24411
1996	47136	43426	40246	16173	24419
1997	52004	43155	44843	15392	22903
1998	54328	38199	54227	16321	25309
1999	53310	25859	48820	19188	23688
2000	46612	38801	46370	23411	26050
2001	42824	41135	42368	27150	23073
2002	44306	37136	31669	29374	19567
2003	48368	42771	40565	35584	30551
2004	60710	51534	51211	47835	42895

Source :- Bureau of Immigration

2.3 SEASONALITY IN FOREIGN TOURIST ARRIVALS

1. Seasonality

The factors like global economic situation, political stability, places of tourist attractions, tourism facilities, touristic image etc., contribute to the flow of foreign tourist arrivals in the country. Besides, there are seasonal variations, which produce identical patterns during corresponding months of successive years. The peak and lean months of arrivals of tourists for top 15 source markets for India during 2004 are given below:

Nationality	Lean Month	Peak Month
U.K.	May	February
U.S.A	April	December
Canada	May	December
France	May	July
Sri Lanka	June	August
Germany	June	November
Japan	May	February
Malaysia	July	November
Australia	May	December
Italy	June	August
Singapore	April	December
Nepal	May	December
Netherlands	May	November
Korea(s)	May	January
Spain	May	August

Source : Information compiled from data received from Bureau of Immigration.

2.4 FOREIGN EXCHANGE EARNINGS FROM TOURISM

The Foreign exchange earnings from tourism since 1991 are as given in the following table:-

Year	Foreign Exchange Earning (Rs. in million)	Percentage Change	Foreign Exchange Earning (in million US \$)	Percentage Change
1991	43180	-	1861	-
1992	59510	37.8	2126	14.2
1993	66110	11.1	2124	-0.1
1994	71290	7.8	2272	7.0
1995	84300	18.2	2583	13.7
1996	100460	19.2	2832	9.6
1997	105110	4.6	2889	2.0
1998	121500	15.6	2948	2.0
1999	129510	6.6	3009	2.1
2000	142380	9.9	3168	5.3
2001	143440	0.7	3042	-4.0
2002	141950	-1.0	2923	-3.9
2003	164290	15.7	3533	20.9
2004	216030	31.5	4769	35.0

Source:- Reserve Bank of India

SHARE OF INDIA IN THE WORLD TOURISM RECEIPTS

The share of India in the World tourism receipts has fluctuated between 0.62% to 0.69% over the last few years. However, the share of India increased 0.77 % since 2004. Following table indicates the receipts & share of India since 1991.

Year	World travel receipts (US \$ Billion)	Travel receipts in India (US \$ Million)	Percentage Share of India
1991	276.9	1861	0.67
1992	315.4	2126	0.67
1993	321.9	2124	0.66
1994	354.9	2272	0.64
1995	405.3	2583	0.64
1996	436.5	2832	0.65
1997	439.7	2889	0.66
1998	442.5	2948	0.67
1999	457.2	3009	0.66
2000	477.0	3168	0.66
2001	463.6	3042	0.66
2002	474.2	2923	0.62
2003	525.0	3533	0.69
2004	622.0	4769	0.77

Source:- 1. World Travel Receipts World Tourism Organization

2. Travel Receipts In India-Reserve Bank of India

2.5 WORLD TOURISM SCENARIO

1. World Tourist Traffic

The world tourist arrivals in the year 2004 were 762.5 million as compared to the arrival figure of 688.8 million during the year 2003, showing an increase of 10.7 per cent during the year 2004 as compared to previous year.

The basic profile of International tourism remained more or less the same during 2004. Europe and 'Asia & the Pacific' were the most important tourist receiving regions, accounting for about 74.5 per cent of the world tourist arrivals in 2004. The following two tables give the summary of international tourist arrivals in different regions over the last few years, and countries which are above India in terms of total tourist arrivals during the last few years.

TABLE 2.5.1

**INTERNATIONAL TOURIST ARRIVALS WORLDWIDE
AND BY REGIONS- 1995-2004
(ARRIVALS IN MILLION)**

Region	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
WORLD										
Arrivals	550	597	618	627	652	687	884	703	688.8	762.5
% Annual Change	-	8.5	3.5	1.3	4.1	5.4	-0.5	2.7	-1.5	10.7
AFRICA										
Arrivals	20.0	21.8	23.2	24.9	26.2	27.4	28.3	29.1	30.6	33.2
% Annual Change	5.8	9.0	6.4	7.3	5.2	4.8	3.3	2.8	3.9	8.2
AMERICAS										
Arrivals	109	115.2	117	120	122	128.0	120	115	113.1	125.7
% Annual Change	3.8	5.9	1.2	2.5	2.3	4.7	-6.1	-4.4	-3.1	11.1
ASIA & THE PACIFIC										
Arrivals	86	93.4	93.1	93.2	103	115	121.1	131	119.8	152.9
% Annual Change	8.1	8.8	-0.3	0.1	10.1	12.4	5.8	8.4	-8.8	27.8
EUROPE										
Arrivals	322.3	304	371	374	381	393	391	400	395.9	415.2
% Annual Change	-3.7	9.7	4.9	0.7	1.8	3.2	-0.5	2.3	-0.8	4.9
MIDDLE EAST										
Arrivals	14	13.3	14.3	15.1	20.5	24.0	23.8	27.8	29.8	35.8
% Annual Change	22.5	-2.2	7.5	5.8	35.8	17.1	-1.7	16.8	3.2	20.3
INDIA										
Arrivals	2.1	2.3	2.4	2.4	2.5	2.6	2.5	2.4	2.7	3.5
% Annual Change	12.8	7.7	3.8	-0.7	5.2	6.7	-4.2	-6.0	14.3	26.8
SHARE OF INDIA (IN %)										
	0.39	0.38	0.38	0.38	0.38	0.39	0.37	0.34	0.39	0.45

SOURCE: World Tourism Organisation

TABLE 2.5.2

**COUNTRIES WHICH ARE ABOVE INDIA IN
TERMS OF TOURIST ARRIVALS
2002-2004**

Rank	Nationality	Tourist	Rank	Nationality	Tourist	Rank	Nationality	Tourist
	arrivals in			arrivals in			arrivals in	
	(000)			(000)			(000)	
	2002			2003			2004	
1	France	77012	1	France	75048	1	France	75121
2	Spain	52327	2	Spain	51830	2	Spain	53599
3	USA	43525	3	USA	41212	3	USA	46077
4	Italy	39799	4	Italy	39604	4	China	41761
5	China	36803	5	China	32970	5	Italy	37071
6	UK	24180	6	UK	24715	6	UK	27708
7	Canada	20057	7	Austria	19078	7	Hongkong	21811
8	Mexico	19667	8	Mexico	18665	8	Mexico	20618
9	Austria	18611	9	Germany	18392	9	Germany	20137
10	Germany	17959	10	Canada	17534	10	Austria	19373
11	Hongkong	16566	11	Hungary	15706	11	Canada	19150
12	Hungary	15870	12	Hongkong	15537	12	Turkey	16826
13	Greece	14180	13	Greece	13969	13	Malaysia	15703
14	Poland	13980	14	Poland	13720	14	Ukraine	15629
15	Malaysia	13292	15	Turkey	13341	15	Poland	14290
16	Turkey	12790	16	Ukraine	12514	16	Greece	<u>13969</u>
17	Portugal	11644	17	Portugal	11707	17	Hungary	12212
18	Thailand	10873	18	Malaysia	10577	18	Thailand	11651
19	Netherlands	9595	19	Thailand	10082	19	Portugal	11617

Rank	Nationality arrivals in (000) 2002	Tourist	Rank	Nationality arrivals in (000) 2003	Tourist	Rank	Nationality arrivals in (000) 2004	Tourist
20	Russian Fed	7943	20	Netherlands	9181	20	Netherlands	9646
21	Saudi Arabia	7512	21	Russian Fed	8015	21	Saudi Arabia	8580
22	Sweden	7459	22	Croatia	7409	22	Macao (china)	8324
23	Singapore	6997	23	Saudi Arabia	7332	23	Russian Fed	<u>8015</u>
24	Croatia	6944	24	Belgium	6690	24	Croatia	7912
25	Switzerland	6868	25	Switzerland	6530	25	South Africa	6815
26	Belgium	6720	26	South Africa	6505	26	Belgium	<u>6690</u>
27	Macao	6565	27	Ireland	6369	27	Ireland	6575
28	South Africa	6550	28	Macau China	6309	28	Switzerland	<u>6530</u>
29	Ukraine	6326	29	UAE	5871	29	Japan	6138
30	Ireland	6065	30	Egypt	5746	30	Czech Rep	6061
31	UAE	5445	31	Singapore	5705	31	Tunisia	5998
32	Korea Rep	5347	32	Japan	5212	32	UAE	<u>5871</u>
33	Japan	5239	33	Tunisia	5114	33	Korea Rep	5818
34	Tunisia	5064	34	Check Rep.	5076	34	Egypt	<u>5746</u>
35	Indonesia	5033	35	Korea Rep	4753	35	Singapore	<u>5705</u>
36	Egypt	4906	36	Morocco	4552	36	Morocco	5501
37	Czech Rep.	4579	37	Indonesia	4467	37	Indonesia	5321
38	Australia	4420	38	Australia	4354	38	Brazil	4725
39	Morocco	4303	39	Brazil	4091	39	Bulgaria	4630
40	Brazil	3783	40	Bulgaria	4048	40	Australia	<u>4354</u>
41	Bulgaria	3433	41	Romania	3739	41	Syrian	4011

Rank	Nationality arrivals in (000) 2002	Tourist	Rank	Nationality arrivals in (000) 2003	Tourist	Rank	Nationality arrivals in (000) 2004	Tourist
42	Andora	3387	42	Dominican Rep.	3282	42	Romania	<u>3739</u>
43	Romania	3204	43	Norway	3269	43	Denmark	3712
44	Bahrain	3167	44	Puerto Rico	3238	44	Norway	3600
45	Norway	3111	45	Andorra	3138	45	Puerto Rico	3541
46	Puerto Rico	3087	46	Argentina	2995	46	Dominican Rep.	3450
47	Taiwan	2978	47	Bahrain	2955	47	India	3457
48	Finland	2875	48	Sweden	2952			
49	Syrian Arab	2870	49	Syrian	2788			
50	Kazakistan	2832	50	India	2726			
51	Argentina	2820						
52	Dominican Rep.	2811						
53	Cyprus	2418						
54	India	2384						

Note: The Figures Underlined Are Repeated Figures Of Previous Year.

Source: World Tourism Organisation.

TABLE 2.5.3
INTERNATIONAL TOURISM
RECEIPTS WORLDWIDE AND BY REGIONS- 1995-2004
(IN BILLION US \$)

Region	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
WORLD										
Receipts	405.3	436.5	439.7	442.5	457.2	477.0	463.8	474.2	525	622
% Annual Change	-	7.7	0.7	0.6	3.3	4.3	-2.8	2.3	10.7	18.5
AFRICA										
Receipts	6.1	9.2	9.4	9.9	10.6	10.8	11.7	11.8	15.8	18.8
% Annual Change	-	13.8	2.2	5.3	6.1	2.9	8.3	0.9	33.9	19.6
AMERICAS										
Receipts	99.6	99.7	110.6	116.9	122.1	132.8	122.5	114.3	114	131.5
% Annual Change	-	0.1	10.9	5.7	4.4	8.8	-7.8	-6.7	-0.3	15.4
EAST ASIA/PACIFIC										
Receipts	73.6	82.3	79.7	75.0	79.6	66.7	67.2	94.7	95.5	125
% Annual change	-	11.5	-3.2	-5.9	6.1	-8.9	0.6	8.6	0.8	30.8
EUROPE										
Receipts	211.2	222.2	224.5	231.7	233.9	234.5	230.4	240.5	263.1	326.3
% Annual change	-	5.2	1.0	3.2	0.9	0.3	-1.7	4.4	17.7	15.3
MIDDLE EAST										
Receipts	6.9	6.2	9.2	6.8	11.2	12.2	11.6	13.0	16.7	20.7
% Annual change	-	-7.9	12.2	-4.3	27.3	8.9	-3.3	10.2	25.5	24.0
INDIA										
Receipts	2.6	2.8	2.9	2.9	3.0	3.2	3.0	2.9	3.5	4.8
% Annual change	-	8.8	2.0	2.0	2.1	6.3	-4.0	-3.0	19.7	37.1
SHARE OF INDIA (IN %)	0.64%	0.65%	0.66%	0.67%	0.66%	0.66%	0.64%	0.62%	0.69%	0.77%

SOURCE: World Tourism Organisation

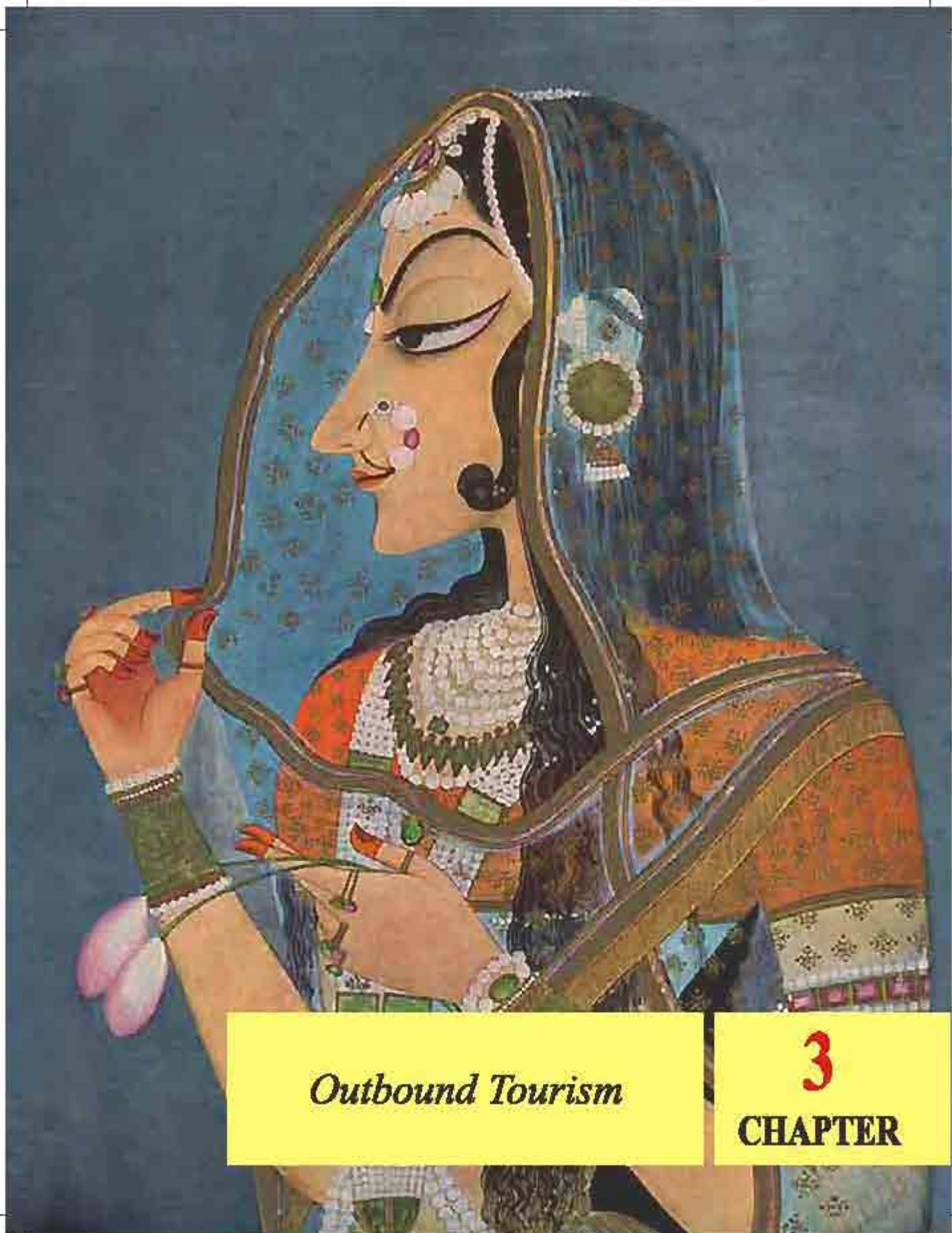
TABLE 2.5.4

**COUNTRIES WHICH ARE ABOVE INDIA IN
TERMS OF RECEIPTS - 2002-2004**

Rank	Country	Tourism receipt (In US\$ Million) 2002	Rank	Country	Tourism receipt (In US\$ Million) 2003	Rank	Country	Tourism receipt (In US\$ Million) 2004
1	USA	66728	1	USA	64509	1	USA	74481
2	Spain	33783	2	Spain	41770	2	Spain	45248
3	France	32738	3	France	37038	3	France	40842
4	Italy	26873	4	Italy	31222	4	Italy	35658
5	UK	20549	5	Germany	22984	5	Germany	27657
6	China	20385	6	UK	22752	6	UK	27299
7	Germany	18968	7	China	17406	7	China	25739
8	Turkey	11901	8	Austria	14068	8	Turkey	15888
9	Austria	11239	9	Turkey	13203	9	Austria	15412
10	Canada	10691	10	Greece	10701	10	Australia	12952
11	Greece	9725	11	Canada	10579	11	Greece	12872
12	Mexico	8858	12	Australia	10318	12	Canada	12843
13	Australia	8578	13	Mexico	9457	13	Japan	11202
14	Thailand	7909	14	Switzerland	9325	14	Mexico	10753
15	Switzerland	7888	15	Netherlands	9249	15	Switzerland	10413
16	Netherlands	7710	16	Japan	8848	16	Netherlands	10260
17	Hongkong	7503	17	Belgium	8130	17	Thailand	10034
18	Malaysia	7118	18	Thailand	7822	18	Belgium	9185
19	Belgium	6890	19	Hongkong	7657	19	Hongkong	9007

Rank	Country	Tourism receipt (In US\$ Million) 2002	Rank	Country	Tourism receipt (In US\$ Million) 2003	Rank	Country	Tourism receipt (In US\$ Million) 2004
20	Korea	5936	20	Portugal	6937	20	Malaysia	8198
21	Portugal	5761	21	Croatia	6376	21	Portugal	7788
22	Indonesia	5285	22	Malaysia	5901	22	Macao China	7452
23	Denmark	4761	23	Sweden	5304	23	Croatia	7074
24	Sweden	4710	24	Macao China	5303	24	Saudi Arabia	6542
25	Taiwan	4584	25	Denmark	5265	25	Sweden	6167
26	Singapore	4463	26	Korea Rep	5256	26	Egypt	6125
27	Macau	4440	27	Egypt	4584	27	Poland	5828
28	Poland	4314	28	Russian Fed.	4502	28	Korea Rep	5697
29	Russian Fed.	4167	29	South Africa	4270	29	Denmark	5669
30	Croatia	3811	30	Poland	4069	30	South Africa	5648
31	Egypt	3764	31	Indonesia	4037	31	Russian Fed	5226
32	Japan	3497	32	Singapore	3998	32	Singapore	5090
33	Saudi Arabia	3418	33	New Zealand	3974	33	New Zealand	4951
34	Hungary	3274	34	Ireland	3875	34	Indonesia	4798
35	Ireland	3088	35	Czech Rep	3556	35	India	4769
36	Czech Rep	2964	36	India	3533			
37	India	2923						

Source: World Tourism Organisation



Outbound Tourism

3

CHAPTER

STATISTICS OF INDIAN NATIONALS GOING ABROAD

The total count of port-wise departures by Indian nationals for visiting other countries is being compiled from Embarkation cards. However, other details like purpose, duration of visit etc. are not compiled from the embarkation Cards. The port-wise details as compiled from the Embarkation cards and destination wise departure statistics as compiled from WTO/PATA publications for the last few years are presented in the following tables.

TABLE 3.1

PORT-WISE DEPARTURE OF INDIAN NATIONALS GOING ABROAD

Port/Land	Year				
	2000	2001	2002	2003	2004
Mumbai(Air)	1680997	1663785	173801	1743463	1909773
Delhi(Air)	963828	1015269	1084097	1149508	1283733
Chennai(Air)	595669	617519	628059	684314	845947
Trivandrum(Air)	320807	312125	299815	323477	345253
Cochin (Air)	140399	182448	259970	347567	427412
Calicut (Air)	158121	180118	227707	266534	333638
Hyerabad (Air)	81035	113200	187451	238934	296150
Kolkata(Air)	176364	166882	162033	169972	191535
Bangalore (Air)	72434	83147	122709	145236	209554
Ahmedabad(Air)	48303	47738	45160	62859	80125
Others	177556	182246	184942	219032	289689
Total	4415513	4564477	4940244	5350896	6212809

Source:-Bureau of Immigration

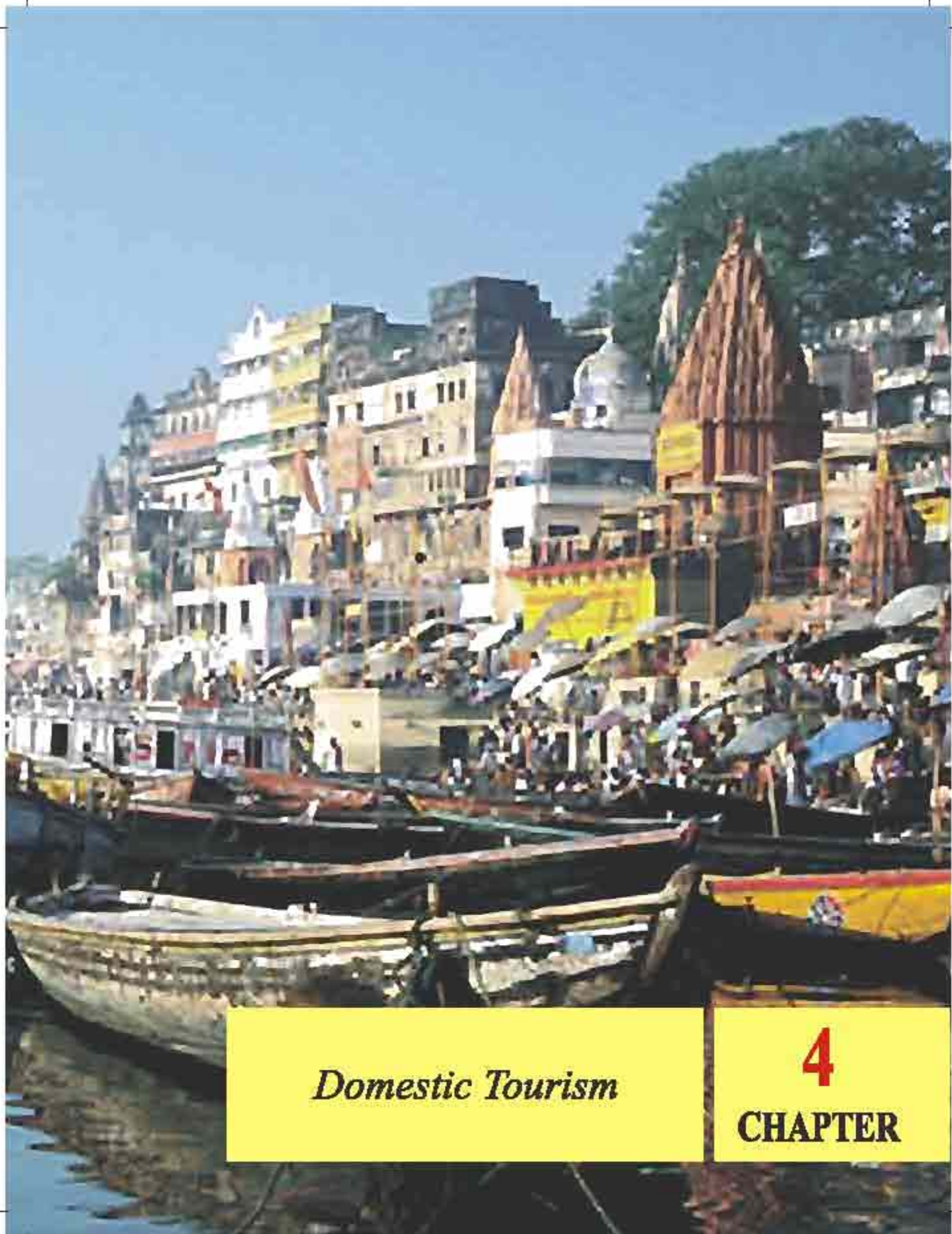
TABLE-3.2
INDIAN NATIONALS-OUTBOUND TRAVEL

DESTINATIONS	ARRIVALS					
	1999	2000	2001	20002	2003	2004
NORTH AMERICA						
Canada	N.A.	52071	54742	55492	57010	68315
USA	228072	274202	269674	257271	272161	N.A.
C & S AMERICA						
Barbados	304	329	403	433	373	N.A.
Chile	1343	1376	1207	1296	1647	N.A.
Cuba	1757	2703	2830	2995	4174	N.A.
Jamaica	751	670	731	530	643	N.A.
Nicargua	364	432	414	423	1153	N.A.
Trinidad & Tabago	908	818	1022	962	931	N.A.
WESTERN EUROPE						
Belgium	11909	12528	12958	22958	17453	N.A.
Finland	2819	3746	3820	3452	3730	N.A.
Italy	47491	60589	51565	70774	53119	N.A.
Portugal	3045	3970	4166	5071	5145	N.A.
Switzerland	64543	71912	72291	80430	84685	N.A.
UK	183000	206000	189000	205000	199000	N.A.
EASTERN EUROPE						
Armenia	147	124	351	470	780	N.A.
Bulgaria	1755	3015	2647	2099	2361	N.A.
Georgia	878	N.A.	1590	1861	N.A.	N.A.
Kazakistan	N.A.	2147	3633	4217	4810	N.A.
Kyrgyzsthan	N.A.	N.A.	358	1590	N.A.	N.A.
Latavia	674	167	181	151	171	N.A.
Maldova	12	24	25	6	N.A.	N.A.
Russia	23372	23476	27576	33546	32954	N.A.
Slovakia	425	1117	1515	1437	1305	N.A.
Tajikistan	48	57	45	N.A.	N.A.	N.A.
Ukraine	3548	3301	2622	4103	6249	N.A.

DESTINATIONS	ARRIVALS					
	1999	2000	2001	2002	2003	2004
AFRICA						
Angola	253	561	582	653	N.A.	N.A.
Botswana	1132	1754	1747	1561	960	N.A.
Egypt	28933	34277	28498	31834	34941	N.A.
Eritrea	345	562	2231	2549	2580	N.A.
Ethopia	1755	3480	3244	3778	3602	N.A.
Guinea	N.A.	284	376	N.A.	548	N.A.
Kenya	23274	24889	23858	24007	27479	N.A.
Mauritius	13583	17241	18890	20898	25367	N.A.
Nigeria	13999	14666	15233	17899	21031	N.A.
Seychelles	952	941	1352	1271	893	N.A.
South Africa	27252	27810	29538	35402	42954	N.A.
Tanzania	23567	18844	24068	21973	22215	N.A.
Zambia	2480	2353	2531	2907	2971	N.A.
WEST ASIA						
Bahrian	195122	213509	247358	312975	N.A.	N.A.
Iraq	4893	3092	3714	N.A.	N.A.	N.A.
Israel	14823	15947	12012	9330	8431	N.A.
Kuwait	226629	225642	270619	N.A.	N.A.	N.A.
Lebanon	7630	7224	7276	8565	9603	N.A.
Oman	43339	52313	61891	57212	83065	N.A.
Palestine	3609	4401	1742	113	561	N.A.
Syria	11772	10685	10688	16689	9560	N.A.
U.A.E.	216219	235493	246335	336046	357941	N.A.
SOUTH ASIA						
Bangladesh	62935	74268	78090	80415	84704	80469
Iran	14817	N.A.	N.A.	N.A.	N.A.	N.A.
Maldives	11621	10616	8511	11377	11502	10999
Nepal	140672	96995	63722	65743	86578	90326
Pakistan	63225	66061	58378	2618	3380	19658
Sri Lanka	42315	31860	33924	69960	90603	105151

DESTINATIONS	ARRIVALS					
	1999	2000	2001	2002	2003	2004
SOUTH EAST ASIA						
Brunei Darussalam	5724	6237	6389	N.A.	N.A.	N.A.
Cambodia	1488	1767	2271	2686	2382	2904
Indonesia	24064	34221	34962	35063	29895	30311
Lao Peo. Dem. Rep.	6533	3309	2693	2319	1590	1845
Malaysia	46537	132127	143513	183360	145442	172966
Myanmar	5083	5605	5572	5691	6291	8357
Philippines	18637	18570	15391	14826	15644	18221
Singapore	288383	346356	339813	375659	309446	471181
Thailand	181033	224104	229751	280641	253752	332387
Vietnam	4600	4812	5844	N.A.	N.A.	N.A.
EAST ASIA						
China (Main)	84203	120930	159361	213611	1219097	309411
Hong Kong	107370	131368	161752	193705	178130	244364
Japan	35930	38767	40345	45394	47520	53000
Macau	7094	7530	8659	10574	9820	15278
Mongolia	366	337	406	347	403	N.A.
Republic of Korea	43829	51369	47657	52725	50215	56964
Taiwan (Pr. of China)	11498	13195	13062	13945	12405	16305
AUSTRALASIA						
American Samoa	40	46	21	N.A.	N.A.	N.A.
Australia	33638	41452	48227	45022	45597	55500
New Zealand	6602	8327	12665	17270	14790	15694
Northern Marina Island	55	80	N.A.	N.A.	N.A.	N.A.
Palau	50	N.A.	N.A.	N.A.	N.A.	N.A.
Tonga	84	102	104	77	N.A.	N.A.
Papua New Guinea	N.A.	N.A.	N.A.	N.A.	621	630

Source:- World Tourism Organisation / PATA



Domestic Tourism

4
CHAPTER

DOMESTIC TOURISM STATISTICS

The compilation of domestic tourist statistics is undertaken by the Statistical Cells in the Department of Tourism of States/UTs. The statistics are based on the monthly returns collected from hotels and other accommodation establishment. The information is collected by using specific formats, and aggregate centre-wise statistics are sent to the Market Research Division of the Department. Most of the States/UTs have been furnishing information on domestic and foreign tourist visits in the State, as also number of nights spent by them. However, there are certain data-gaps as some of the States have not been furnishing complete information as required to tabulate data on All-India basis. The figures of domestic and foreign tourist visits in various States/UTs for the years 2002 to 2004 have been compiled/estimated on the basis of figures available, and are presented in the following table.

As may be seen from Table 4.1, there has been a continuous increase in domestic tourist visits, with the year 2004 witnessing a growth of 18.5 percent over the year 2003, against a growth of 14.6 percent in the year 2003 over 2002. However, the visits by foreign tourists, as per the information furnished by the State Governments, have shown an increase of 23.7 per cent during 2004 over the previous year, compared to an increase of 30.1 per cent in 2003.

Table 4.2 presents the data of numbers of visitors of various centrally Protected monuments during the year 2002-2004. The information is compiled by the Archeological Surveys of India (ASI) and available for the monuments protected by ASI. These are the monuments or sites which are more then 100 years old and considered to be of national importance.

TABLE 4.1
STATE WISE DOMESTIC AND FOREIGN TOURIST VISITS
DURING THE YEARS 2002, 2003 & 2004

State/U.T.	2002		2003		2004		2004 % Prop of total	
	Domestic	Foreign	Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
1 Andhra Pradesh	60487370	210310	74138729	479318	89440272	501019	24.4	6.0
2 Arunachal Pradesh	4372	187	2195	123	4740	269	0.0	0.0
3 Assam	1953915	6409	2156675	6610	2288093	7285	0.6	0.1
4 Bihar	6860207	112873	6044710	60820	8097456	38118	2.2	0.5
5 Goa	1325296	271645	1725140	314357	2085729	363230	0.6	0.4
6 Gujarat	5735286	34187	7640479	37534	7748371	21179	2.1	0.3
7 Haryana	6426763	85281	5903196	84981	5399099	66153	0.6	0.4
8 Himachal Pradesh	4958917	144383	5543414	167902	6345069	204344	1.7	2.5
9 Jammu & Kashmir	4570583	7821	5748846	24330	6881473	40242	1.9	0.5
10 Karnataka	8678670	59545	11175292	249908	27194178	530225	7.4	6.4
11 Kerala	5568256	232564	5871228	294621	5972182	345546	1.6	4.2
12 Madhya Pradesh	4903242	67319	5968719	92278	8619486	145335	2.4	1.8
13 Maharashtra*	9802527	768935	11272906	986544	13392212	1218382	3.7	14.7
14 Manipur	89633	221	92923	257	93476	249	0.0	0.0
15 Meghalaya	268609	3146	371953	6304	433495	12407	0.1	0.1
16 Mizoram	29417	259	35129	279	38598	326	0.0	0.0
17 Nagaland	14263	657	5605	743	10056	1084	0.0	0.0
18 Orissa	3289205	23279	3701245	25020	4125536	28817	1.1	0.3
19 Punjab	317904	7558	1150015	4589	361568	7312	0.1	0.1
20 Rajasthan	8300190	428437	12545135	628560	16033896	971772	4.4	11.7

State/U.T.	2002		2003		2004		2004 % Prop of total	
	Domestic	Foreign	Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
21 Sikkim	159342	8566	179661	11966	230719	14646	0.1	0.2
22 Tamil Nadu	39873160	804041	40213060	901504	42279838	1058012	11.5	12.8
23 Tripura	260586	2602	257331	3196	260907	3171	0.1	0.0
24 Uttaranchal	10606504	45070	10835241	55228	11720570	62885	3.2	0.8
25 Uttar Pradesh	71490000	710000	80020000	817000	88360000	974000	24.1	11.7
26 Chattisgarh	1058565	993	1256407	1150	1897200	3000	0.5	0.0
27 Jharkhand	313134	2244	398342	3223	461486	4375	0.1	0.1
28 West Bengal	8844232	529366	11300763	705457	12380389	775694	3.4	9.3
29 Andaman & Nicobar	90629	5101	85826	4142	105004	4578	0.0	0.1
30 Chandigarh	554948	13706	567259	17057	599448	16137	0.2	0.2
31 Daman & Diu	595449	6569	447825	3274	399800	4111	0.1	0.0
32 Delhi*	1228059	543036	1430546	693827	1866552	839574	0.5	10.1
33 Dadra & Nager Haveli	452100	202	447825	136	532016	168	0.1	0.0
34 Lakshadweep	6173	912	4604	682	3889	1285	0.0	0.0
35 Pondichery	480522	20094	500111	25559	558445	32053	0.2	0.4
Total	269598028	5157518	309038335	6708479	366221248	8296983	100.0	100.0

* Figures are estimated

Source :State/ U.T. Tourism Departments.

TABLE 4.2
TOTAL NUMBER OF VISITORS TO VARIOUS CENTRALLY
PROTECTED MONUMENTS
DURING THE YEARS 2002, 2003 & 2004

S.No	Name of the Monument	2002	2003	2004
AGRA CIRCLE				
1	Taj Mahal	1761339	1854658	2212952
2	Agra Fort	802773	1032120	1226340
3	Fatehpur Sikri	313884	390933	467218
4	Akbar's tomb, Sikandara	231511	225478	290027
5	Mariam's Tomb, Agra	8085	9246	13239
6	Itimad-ud-Daula, Agra	58391	68337	84287
7	Ram Bagh, Agra	7705	7796	8251
8	Methab Bagh, Agra	560	1691	1937
9	Taj Museum, Taj mahal	9888	N. A.	N. A.
Total		3293936	3590259	4304251
AURANGABAD CIRCLE				
10	Ajanta Caves, Ajanta	285524	302333	295036
11	Ellora Caves, Ellora	397487	434252	390368
12	Elephanta Caves	273080	272256	300602
13	Bibi-Ka-Maqbara, Aurangabad	570302	538246	555545
14	Kanheri Caves, Mumbai	55836	52621	66911
15	Karla Caves, Karla	116496	119415	121852
16	Daulatabad Fort	332301	312467	302387
17	Caves, temple & inscriptions, Junnar	216701	238474	208193
18	Raigad Fort	65358	67809	79148
19	Shaniwarwade, Pune	269163	293362	239094
20	Pandavlena Caves	56874	47999	47178
21	Hirakota Old fort, Alibagh	22591	27486	31682
22	Old fort Sholapur	1851	1869	1540
23	Caves, Temples & Inscription, Bhalia	25309	23536	25421
24	Aurangabad Caves	21633	29306	30676

S.No	Name of the Monument	2002	2003	2004
25	Aga Khan Palace	NA	52338	66785
	Total	2710506	2811769	2761418
	BANGALORE CIRCLE			
26	Vithala Temple, Hampi	89719	101803	157441
27	Zanana Enclosures, Hampi	91759	151720	144152
28	Daria Daulat Bagh, Srirangapatnam	388648	555391	612478
29	Keshava Temple, Somnathpura	69730	84062	102142
30	Tipu Sultan Place, Bangalore	138364	127095	147601
31	Chitradurga Fort	119624	130071	223072
32	Bellary Fort	5545	1535	5033
	Total	903387	1151677	1392117
	BHOPAL CIRCLE			
33	Western Group of Monuments - Khajuraho	145833	163006	203556
34	Shashi Fort at Burhanpur	10064	32603	38814
35	Bagh Caves	3184	8815	15343
36	Royal Complex Mandu	91749	119227	122942
37	Rani Roopmati Museum Mandu	75149	101349	123436
38	Hoshang Shah Tomb., Mandu	16381	16514	21825
39	Buddhist Monument at Sanchi	76250	74139	87117
40	Chanderi Museum	2933	1930	118256
41	Khajuraho Museum	5618	4368	38664
42	Gwalior Museum	10317	17018	NA
43	Sanchi Museum	17567	10328	NA
44	Gwalior Monument	40442	98847	NA
45	Bhojshala & Kamal Moula Moeque	NA	38440	NA
	Total	495485	686614	769953

S.No	Name of the Monument	2002	2003	2004
BHUBANESWAR CIRCLE				
46	Sun Temple, Konarak	954339	951011	1010858
47	Raja rani Temple	15859	14507	12238
48	Udayagiri & Kandagiri caves	150946	151190	147300
49	Excavated Site Ratnagiri	7067	6068	8740
50	Excavated Site Lalitagiri	4414	4004	4944
51	Laxman Temple Sirpur	8521	5904	12090
Total		1140946	1132684	1196170
KOLKATA CIRCLE				
52	Bishnupur Group of Temples	62117	42030	58678
53	Kooch Bihar Palace	98622	137758	157411
54	Hazarduary Palace Museum Murshidabad	353921	321319	324201
Total		514660	501107	540290
CHANDIGARH CIRCLE				
55	Sheikh Chillis Tomb Thanesar	23835	38439	39740
56	Suraj Kund	36059	40167	36450
57	Kangra Fort	38180	36854	NA
58	Rock Cut Temple Masroor	7832	8456	NA
Total		105506	123918	76190
SHIMLA CIRCLE				
59	Kangra Fort	NA	NA	6446
60	Rock Cut Temple Masroor	NA	NA	2486
Total		NA	NA	8932

S.No	Name of the Monument	2002	2003	2004
CHENNAI CIRCLE				
61	Group of monuments, Mamallapuram	565034	534610	606803
62	Fort Museum	16079	26913	122991
63	Gingee Fort	131646	122812	NA
64	Dindigul Fort	23179	24758	31810
65	Moover Koil, Kodumbalurain Temple, Sitt	858	900	791
66	Rock Cut Janvasal	10173	11928	14955
67	Natural Cavem , Eladipattanam	12173	11535	16801
68	Fort Thirumayan	20863	21362	30327
69	St. George Fort, Chennai	NA	NA	22643
Total		780005	754818	847121
DHARWAD CIRCLE				
70	Durga Temple complex, Aihole	82678	101395	90824
71	Caves at Badami	206014	198462	172485
72	Group of Monuments at Pattadakal	137106	137029	113396
73	Gol-Gumbaz	553076	573698	495954
74	Ibrahim Rouza	99998	113707	93106
75	Temple & Sculpture Gallery, Lakkundi	5549	5119	3702
Total		1084420	1129410	969467
DELHI CIRCLE				
76	Jantar Mantar,	176576	173809	241709
77	Rahim-Khane-Khanam Tomb Delhi	4270	2873	3347
78	Purana Qila	507368	541066	493986
79	Sultangahri Tomb	347	249	173
80	Tughluqabad Fort	13159	18442	13106
81	Kofia Feroz Shah	25143	26758	28375
82	Safdarjung Tomb	241483	195954	174240
83	Red Fort	1491388	3082255	1904883

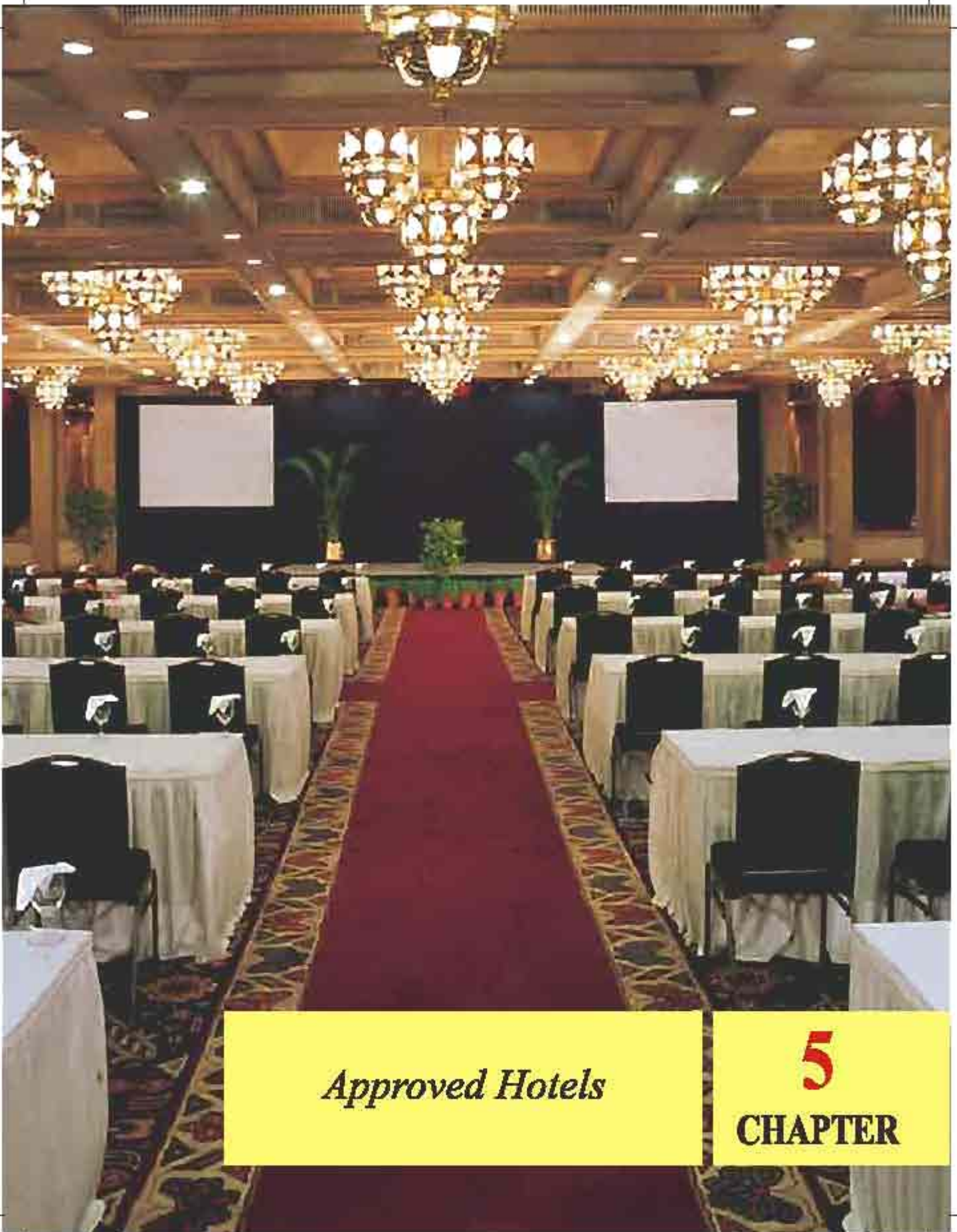
S.No	Name of the Monument	2002	2003	2004
84	Humayun,s Tomb	156803	203465	313228
85	Qutab Minar	1487048	1727440	1982962
	Total	4103582	5972311	5156009
	MINI CIRCLE GOA			
86	Archaeological Museum,Velha Goa	197294	211083	NA
	GUWAHATI CIRCLE			
87	Ahom Raja,s Palace, Gurgaon	26924	32424	22390
88	Karanghar Palace, Joyasagar	71631	94074	74862
89	Rangghar Pavilion, Joyasagar	19529	18517	15537
90	Vishudol, Joyasegar	5601	5520	6220
91	Group of Maidan Cheraideo	21191	22704	19323
	Total	144876	173239	138332
	HYDERABAD CIRCLE			
92	Golconda Fort	580837	675873	775810
93	Fort, Raja & Rani Mahal Chandragiri	55916	82625	107557
94	Chaminar Hyderabad	NA	1046915	1074214
95	Ruined Buddhist Stupa & Remains Amarvati	11694	12973	18143
96	Hill of Nagarjunakonda with ancient remains Nagarjunakonda	60156	52218	92465
97	Group of Buddhist monuments, Guntupalli	11891	17363	20622
98	Four storeid Rock cut hindu Temple Undavalli	11640	14604	27412
99	Warangal Fort, warangal	10626	27754	90416
100	Amaravati Archaeological Museum	54924	54166	NA
101	Chandragiri Museum	45191	69481	NA
102	Kondapur Archawological Museum	889	891	NA
103	Nagarjunakonda Museum	39697	48348	NA
	Total	883441	2103231	2204639

S.No	Name of the Monument	2002	2003	2004
JAIPUR CIRCLE				
104	Deeg Palaces, Deeg	19116	19067	16806
105	Kumbhalgarh Fort	41696	61115	77172
106	Chittaurgarh Fort	252606	266558	274540
107	Kalibangan Museum	N A	1821	N A
Total		313417	347581	368518
LUCKNOW CIRCLE				
108	Rani Mahal, Jhansi	19940	8341	7605
109	Sahet Shrivasth	76275	27809	34652
110	Jhansi Kila, Jhansi	64474	102573	110492
111	Residency, Lucknow	158841	145209	131648
112	Memorial Museum Residency,	N A	20328	N A
Total		319530	304260	284397
PATNA CIRCLE				
113	Kumrahar Excavated Site	42991	26843	24118
114	Asokan Pillar Kothua, Vaishali	14744	26073	29274
115	Samath Excavated Site	212049	206603	238177
116	Jaunpur Fort	47828	48102	51797
117	Man Singh Observatory, Varanasi	1887	2000	2354
118	Nalanda Excavated Site	211291	183107	203212
119	Sasaram Shershah Suri Tomb	79381	73229	81506
120	Lord Cornwallis Tomb, Gazipur	6702	5594	4138
121	Antichak Excavated Site	6279	4079	4683
Total		623152	574630	639257
SRINAGAR CIRCLE				
122	Ram Nagar Palaces	2215	2207	2434
123	Temple at Kramchi	430	428	644

S.No	Name of the Monument	2002	2003	2004
124	Avanti Swamin Temple, Avantipur	2476	2773	4259
125	Leh Palace,	1035	2570	3502
	Total	6158	7978	10839
	TRISSUR CIRCLE			
126	Bekal Fort	125889	127910	142861
127	Mattanchery Palace	151516	173830	NA
	Total	277405	301740	142861
	VADODRA CIRCLE			
128	Sun Temple Modhera	91181	107533	106619
129	Rani-ki-Vav, Patan	70649	85967	90952
130	Monuments at Champaner	34580	39114	37983
131	Buddhist Caves, Junagadh	32774	39260	54921
132	Ashokan Rock Edict, Junagadh	37581	48404	44385
133	Baba Pyare Kodiya Caves, Junagarh	69	222	342
134	Archaeological Museum Lothal	5539	13328	NA
	Total	272363	333828	335202
	GRAND TOTAL	181700672	2212117	22145963

Source : Archaeological Survey of India (ASI)

- Note:-
- 1. ASI Circle:** For the purpose of conservation of various monuments, the country has been divided into 20 Circles, each under the jurisdiction of a Superintending Archaeologist.
 - 2. ASI Protected Monument:** Any monument or site which is more than 100 years old, and is considered to be of national importance, is called ASI protected monument or site.



Approved Hotels

5
CHAPTER

STATISTICS OF APPROVED HOTELS

1. Approved Hotels

The Ministry of Tourism has adopted a system of approving and classifying the hotels on the basis of the facilities and services provided by them. The detailed guidelines for approval and classification of hotels in different categories are given at the Appendix-I, II and III.

The category-wise details regarding the number of hotels and room availability during the past two years are presented below:-

TABLE 5.1

NUMBER OF APPROVED HOTELS AND AVAILABILITY OF ROOMS

Category	No. of Hotels		No. of Rooms	
	2003	2004	2003	2004
One Star	201	207	6606	6765
Two Star	533	560	17629	18449
Three Star	551	634	26071	28783
Four Star	122	126	8655	8831
Five Star	85	89	10416	10982
Five Star Deluxe	74	78	16885	17885
Heritage Hotel	77	79	2124	2173
Classification awaited	79	119	3334	3902
Total	1722	1892	91720	97770

Source:- Administrative Records on Hotels maintained by Department of Tourism.

2. Occupancy rates of different category of hotels by domestic & foreign tourist during 2004.

An analysis of data received indicate that average hotel occupancy rate in 2004 was 65.1 percent compared to 60.7 percent in 2003. In estimating the hotel occupancy rate, information on number of rooms in hotels, number of guests checked in (separately domestic and foreign guests), bed nights occupied, etc. received from a sample of hotels of various categories (star categories, heritage and unapproved hotels) located in selected States have been analysed. The States are: Andhra Pradesh, Goa, Gujarat, Himachal Pradesh, Karnataka, Kerala, Madhya Pradesh, Maharashtra, Rajasthan, Tamil Nadu, Uttar Pradesh, West Bengal, Delhi, Orissa, Bihar, Assam, Punjab and Uttranchal.

The table below indicates the occupancy rates of different category of hotels by domestic and foreign tourists:-

**TABLE-5.2
OCCUPANCY RATE**

State Category	Domestic tourists		Foreign tourist		Total	
	2003	2004	2003	2004	2003	2004
1 Star	40.1	38.2	18.8	22.4	58.9	60.6
2 Star	37.8	40.4	2.7	12.7	50.5	53.1
3 Star	52.8	52.9	9.3	11.3	62.1	64.2
4 Star	42.4	51.9	23.4	19.6	65.8	71.5
5 Star	37.8	39.2	28.8	30.8	66.6	70.0
5 Star Deluxe	30.8	32.2	29.4	35.1	60.2	67.3
Heritage	22.8	20.3	32.6	46.8	55.4	67.1
Others	44.8	49.8	5.5	5.4	50.3	55.2
Overall	40.1	41.8	20.6	23.3	60.7	65.1

SOURCE:-Information compiled from returns submitted by Approved Hotels to Department of Tourism

Out of 65.1 percent occupancy in 2004, 41.8 percent was by domestic tourists and 23.3 percent by foreign tourists. The occupancy level in the quality hotels of 5-star and 5-star deluxe category was 70.0 percent & 67.3 percent respectively whereas the occupancy rate of heritage hotels was observed to be the 67.1 percent during the year. During the year, 4 star hotels on an average had the highest occupancy of 71.5 percent.

Amongst the foreign tourists, most popular category was heritage hotels, which had 46.8 percent occupancy for foreign tourists, followed by 5-star deluxe hotels where 35.1 percent occupancy was due to foreign tourists. On the other hand, the domestic tourists account for the highest occupancy of 52.9 percent in 3-star hotels, followed by 51.9 percent in 4-star hotels.

The analysis also reveals that occupancy rate by domestic tourists is higher in most of the categories of hotels than by the foreign tourists with the exception of Heritage and 5 star deluxe category in which foreign tourists have higher occupancy.

3. STATEWISE DISTRIBUTION OF CLASSIFIED HOTEL ROOMS

(As on 31.12.2004)

An analysis of state-wise data of classified hotels reveal that maximum number of approved hotels are in the State of Maharashtra at 332, followed by Kerala (240) and Tamil-Nadu (197). So far as hotel rooms are concerned, maximum hotel rooms are in the state of Maharashtra at 18,248 followed by Tamil Nadu at 11120 rooms and Delhi at 10159. State wise and city wise number of approved hotels, and hotel rooms are given in the table 5.3 below:

TABLE 5.3
DISTRIBUTION OF APPROVED HOTELS AND ROOMS IN INDIA

S. State/Place No.	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
1 ANDHRAPRADESH									
Anajpur	-	-	-	1	1	-	-	-	2
	-	-	-	170	126	-	-	-	296
Adilabad	-	-	-	1	-	-	-	-	1
	-	-	-	41	-	-	-	-	41
Chittoor	-	-	-	-	-	-	-	1	1
	-	-	-	-	-	-	-	48	48
Cuddapah	-	-	-	-	1	-	-	1	2
	-	-	-	-	31	-	-	61	92
Guntur	-	-	-	3	2	-	-	2	7
	-	-	-	118	64	-	-	93	275
Hanuman Konda	-	-	-	1	-	-	-	-	1
	-	-	-	55	-	-	-	-	55
Hyderabad	3	2	4	27	11	3	-	2	52
	710	219	476	1542	801	130	-	94	3972
Ibrahimpatnam	-	-	-	-	1	-	-	-	1
	-	-	-	-	22	-	-	-	22
Kakinada	-	-	-	1	1	-	-	-	2
	-	-	-	51	66	-	-	-	117
Karim Nagar	-	-	-	-	-	-	-	1	1
	-	-	-	-	-	-	-	66	66
Khammam	-	-	-	-	-	-	-	1	1

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
	Kathagudam	-	-	-	-	-	-	-	1	1
		-	-	-	-	-	-	-	20	20
	Kurnool	-	-	-	4	1	-	-	-	5
		-	-	-	193	34	-	-	-	227
	Mayiladuthurai	-	-	-	-	1	-	-	-	1
		-	-	-	-	18	-	-	-	18
	Nandyal	-	-	-	1	-	-	-	-	1
		-	-	-	36	-	-	-	-	36
	Nellore	-	-	-	3	1	-	-	1	5
		-	-	-	124	24	-	-	31	179
	Nirmal	-	-	-	-	1	-	-	-	1
		-	-	-	-	42	-	-	-	42
	Nizambad	-	-	-	-	4	-	-	-	4
		-	-	-	-	159	-	-	-	159
	Proddutur	-	-	-	-	-	-	-	1	1
		-	-	-	-	-	-	-	33	33
	Puttaparthi	-	-	-	-	2	-	-	-	2
		-	-	-	-	68	-	-	-	68
	Rajamundry	-	-	-	1	1	-	-	-	2
		-	-	-	79	48	-	-	-	127
	Srikalahasti	-	-	-	-	1	-	-	-	1
		-	-	-	-	27	-	-	-	27
	Srikakulam	-	-	-	-	1	-	-	-	1
		-	-	-	-	32	-	-	-	32
	Tadapalligudam	-	-	-	-	1	-	-	-	1
		-	-	-	-	16	-	-	-	16
	Tirupati	-	-	-	7	1	-	-	1	9
		-	-	-	594	60	-	-	138	792
	Vijaywada	-	-	1	8	2	1	-	1	13
		-	-	94	453	95	36	-	34	712
	Visakhapatnam	1	1	1	5	3	-	-	1	12
		94	66	143	326	124	-	-	30	783
	Warangal	-	-	-	31	2	-	-	1	34
		-	-	-	-	49	-	-	35	84
	(No. of Hotels)	4	3	6	94	39	4	0	15	165
	(No. of Rooms)	804	285	713	3782	1906	166	0	712	8368

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
2. Arunachal Pradesh										
	Itanagar		-	-	-	-	-	-	1	1
			-	-	-	-	-	-	10	10
	(No. of Hotels)	0	0	0	0	0	0	0	1	1
	(No. of Rooms)	0	0	0	0	0	0	0	10	10
3. Assam										
	Dibrugarh	-	-	-	-	1	-	-	-	1
		-	-	-	-	38	-	-	-	38
	Guwahati	-	-	2	5	2	-	-	1	10
		-	-	154	232	54	-	-	53	493
	Jorhat	-	-	-	-	1	-	-	-	1
		-	-	-	-	31	-	-	-	31
	Kaziranga	-	-	-	-	-	-	-	1	1
		-	-	-	-	-	-	-	18	18
	Sibsagar	-	-	-	-	1	-	-	-	1
		-	-	-	-	29	-	-	-	29
	Silehar	-	-	-	-	1	-	-	-	1
		-	-	-	-	44	-	-	-	44
	Tinsukia	-	-	-	1	1	-	-	-	2
		-	-	-	38	20	-	-	-	58
	(No. of Hotels)	0	0	2	6	7	0	0	2	17
	(No. of Rooms)	0	0	154	270	216	0	0	71	711
4. Bihar										
	Bella	-	-	-	-	-	-	-	1	1
		-	-	-	-	-	-	-	20	20
	Bhagalpur	-	-	-	-	1	-	-	-	1
		-	-	-	-	23	-	-	-	23
	Bodhgaya	-	-	-	5	-	-	-	-	5
		-	-	-	235	-	-	-	-	235
	Bokaro	-	-	-	3	2	-	-	-	5
		-	-	-	132	51	-	-	-	183
	Dhanbad	-	-	-	1	2	-	-	-	3
		-	-	-	44	36	-	-	-	80
	Gaya	-	-	-	1	-	-	-	-	1
		-	-	-	52	-	-	-	-	52
	Jamshedpur	-	-	1	2	1	1	-	-	5
		-	-	40	63	36	30	-	-	169
	Patna	-	1	1	4	1	-	-	1	8
		-	80	67	218	36	-	-	16	417

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
	Rajgir	-	-	1	-	-	-	-	-	1
		-	-	26	-	-	-	-	-	26
	Muzaffar Pur	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	16	-	-	16
	(No. of Hotels)	0	1	3	16	7	2	0	2	31
	(No. of Rooms)	0	80	133	744	182	46	0	36	1221

5. Chhattisgarh

	Durg	-	-	-	1	-	-	-	-	-
		-	-	-	31	-	-	-	-	-
	Raipur	-	-	-	-	1	-	-	-	1
		-	-	-	-	13	-	-	-	13
	(No. of Hotels)	0	0	0	1	1	0	0	0	2
	(No. of Rooms)	0	0	0	31	13	0	0	0	44

6. Delhi

	Delhi	14	13	9	14	20	12	-	11	93
		4819	2280	925	899	596	284	-	356	10159
	(No. of Hotels)	14	13	9	14	20	12	0	11	93
	(No. of Rooms)	4819	2280	925	899	596	284	0	356	10159

7. Goa

	Goa	8	5	2	22	35	23	1	2	98
		1805	667	247	2294	1442	958	13	38	7464
	(No. of Hotels)	8	5	2	22	35	23	1	2	98
	(No. of Rooms)	1805	667	247	2294	1442	958	13	38	7464

8. Gujarat

	Ahmedabad	-	1	5	12	1	-	1	1	21
		-	88	269	470	25	-	43	33	928

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
	Amipura	-	-	-	1	-	-	-	-	1
		-	-	-	52	-	-	-	-	52
	Ankaleshwar	-	-	-	-	1	-	-	1	2
		-	-	-	-	44	-	-	40	84
	Baruch	-	-	-	-	1	-	-	-	1
		-	-	-	-	30	-	-	-	30
	Bhavnagar	-	-	-	1	2	-	1	1	5
		-	-	-	38	60	-	23	30	151
	Bhuj	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	15	-	-	15
	Chitrasani	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	17	-	17
	Gandhidham	-	-	1	2	-	-	-	-	3
		-	-	53	70	-	-	-	-	123
	Gondal	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	11	-	11
	Gandhi Nagar	-	-	-	1	-	1	-	-	2
		-	-	-	84	-	10	-	-	94
	Jamnagar	-	-	-	1	1	-	-	-	2
		-	-	-	60	36	-	-	-	96
	Mehsana	-	-	-	1	-	-	-	-	1
		-	-	-	52	-	-	-	-	52
	Rajkot	-	-	1	3	2	-	-	-	6
		-	-	114	106	57	-	-	-	277
	Saputara	-	-	-	-	1	-	-	1	2
		-	-	-	-	40	-	-	40	80
	Surat	-	1	-	3	1	-	-	1	6
		-	140	-	162	60	-	-	56	418
	Udlal	-	-	-	-	-	-	-	1	1
		-	-	-	-	-	-	-	91	91
	Vadodara	-	1	1	5	2	2	-	0	11
		-	102	62	265	68	70	-	0	567
	Vapi	-	-	-	-	1	-	-	-	1
		-	-	-	-	29	-	-	-	29
	Valsad	-	-	-	1	1	-	-	-	2
		-	-	-	36	36	-	-	-	72
	(No. of Hotels)	0	3	8	31	14	4	4	6	70
	(No. of Rooms)	0	330	498	1395	485	95	94	290	3187

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
9. Haryana										
	Ambala	-	-	-	1	1	-	-	-	2
		-	-	-	32	37	-	-	-	69
	Bahadurgarh	-	-	-	1	-	-	-	-	1
		-	-	-	22	-	-	-	-	22
	Badshahpur	-	-	-	1	-	-	-	-	1
		-	-	-	20	-	-	-	-	20
	Faridabad	-	-	-	2	-	-	-	-	2
		-	-	-	95	-	-	-	-	95
	Gurgaon	-	-	-	4	1	-	-	-	5
		-	-	-	180	26	-	-	-	206
	Karnal	-	-	-	1	-	-	-	-	1
		-	-	-	21	-	-	-	-	21
	Manesar	-	-	-	1	-	-	-	-	1
		-	-	-	80	-	-	-	-	80
	Panipat	-	-	-	2	-	-	-	-	2
		-	-	-	58	-	-	-	-	58
	Panchkula	-	-	1	2	-	-	-	-	3
		-	-	49	47	-	-	-	-	96
	Rewari	-	-	-	1	-	-	-	-	1
		-	-	-	30	-	-	-	-	30
	Sikapur	-	-	-	1	-	-	-	-	1
		-	-	-	25	-	-	-	-	25
	Surajkund	-	1	-	-	-	-	-	-	1
		-	72	-	-	-	-	-	-	72
	Yamuna Nagar	-	-	-	1	-	-	-	-	1
		-	-	-	20	-	-	-	-	20
	(No. of Hotels)	0	1	1	18	2	0	0	0	22
	(No. of Rooms)	0	72	49	630	63	0	0	0	614

10. Himachal Pradesh

	Dalhousie	-	-	-	1	1	-	-	-	2
		-	-	-	20	26	-	-	-	46
	Katra	-	-	-	1	-	-	-	-	1
		-	-	-	29	-	-	-	-	29
	Kullu	-	1	-	-	-	-	-	-	1
		-	25	-	-	-	-	-	-	25

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
	Manali	-	-	2	1	1	-	-	-	4
		-	-	61	25	21	-	-	-	107
	Mashobra (shimla)	1	-	-	-	-	-	-	-	1
		85	-	-	-	-	-	-	-	85
	Nalagarh	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	15	-	15
	Parwanoo	-	-	-	-	2	-	-	-	2
		-	-	-	-	36	-	-	-	36
	Shimla	1	-	2	2	-	-	2	-	7
		84	-	80	47	-	-	45	-	258
	Solan	-	-	-	-	1	-	-	-	1
		-	-	-	-	12	-	-	-	12
	Taragarh	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	15	-	15
	(No. of Hotels)	2	1	4	5	5	0	4	0	21
	(No. of Rooms)	169	25	141	121	95	0	75	0	626

11 JHARKHAND

	Ranchi	-	-	1	5	2	-	-	-	8
		-	-	25	174	67	-	-	-	266
	(No. of Hotels)	0	0	1	5	2	0	0	0	8
	(No. of Rooms)	0	0	25	174	67	0	0	0	266

12 Jammu & Kashmir

	Jammu & Kashmir	-	-	-	1	-	-	-	-	1
		-	-	-	70	-	-	-	-	70
	Gulmarg	-	-	-	1	1	-	-	-	2
		-	-	-	39	23	-	-	-	62
	Jammu	-	-	2	-	1	-	1	-	4
		-	-	142	-	23	-	18	-	183
	Katra	-	-	-	1	1	-	-	-	2
		-	-	-	70	43	-	-	-	113
	Pahalgaon	-	-	-	1	-	-	-	1	2
		-	-	-	42	-	-	-	68	110
	Srinagar	-	3	-	2	3	-	-	-	8
		-	446	-	127	177	-	-	-	750
	(No. of Hotels)	0	3	2	6	6	0	1	1	19
	(No. of Rooms)	0	446	142	348	266	0	18	68	1288

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
13 Karnataka										
	Bangalore	4 664	3 587	2 192	10 197	13 884	2 117	- -	1 57	35 2698
	Chikmangalur	- -	- -	1 29	- -	- -	- -	- -	- -	1 29
	Coorg	- -	- -	- -	- -	1 48	- -	- -	- -	1 48
	Hassan	- -	- -	- -	- -	- -	1 46	- -	- -	1 46
	Hubli	- -	- -	- -	- -	- -	1 50	- -	1 26	2 76
	Mangalore	- -	- -	- -	2 140	- -	- -	- -	2 124	4 264
	Mercara	- -	- -	- -	1 22	- -	- -	- -	- -	1 22
	Mysore	- -	2 108	- -	2 95	3 156	3 220	- -	2 95	12 674
	(No. of Hotels)	4	5	3	15	17	7	0	6	57
	(No. of Rooms)	664	695	221	454	1088	433	0	302	3857

14 Kerala

	Alleppey	- -	- -	- -	1 21	5 136	1 12	1 12	- -	8 181
	Angamaly	- -	- -	- -	- -	2 43	- -	- -	- -	2 43
	Alappuzhe	- -	- -	- -	2 110	- -	1 17	- -	- -	3 127
	Atwaye	- -	- -	- -	- -	- -	1 10	- -	- -	1 10
	Angamatty	- -	- -	- -	1 36	1 12	1 32	- -	- -	3 80
	Cannanore	- -	- -	- -	- -	1 26	- -	- -	1 56	2 84
	Changana cherry	- -	- -	- -	- -	3 46	- -	- -	- -	3 46
	Thiruvalla	- -	- -	- -	- -	1 21	- -	- -	- -	1 21

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
	Ernakulam	-	1	-	4	2	1	-	-	8
		-	108	-	167	61	21	-	-	357
	Guruvayur	-	-	-	2	6	1	-	-	9
		-	-	-	39	204	45	-	-	288
	Kannur	-	-	-	2	1	1	-	-	4
		-	-	-	72	36	30	-	-	138
	Kalpetta, wayanad	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	29	-	-	29
	Kochi	2	2	6	16	11	5	4	-	46
		252	152	279	651	387	279	46	-	2046
	Korsanyad	-	-	-	-	1	-	-	-	1
		-	-	-	-	21	-	-	-	21
	Karunagapalli	-	-	-	-	1	-	-	-	1
		-	-	-	-	30	-	-	-	30
	Trichur	-	-	-	2	1	-	-	-	3
		-	-	-	43	36	-	-	-	79
	Kondotty	-	-	-	-	1	-	-	-	1
		-	-	-	-	12	-	-	-	12
	Udyogmandal	-	-	-	-	1	1	-	-	2
		-	-	-	-	21	13	-	-	34
	Pothannedu	-	-	-	-	1	-	-	-	1
		-	-	-	-	36	-	-	-	36
	Kollam	-	-	-	4	1	-	-	-	5
		-	-	-	94	10	-	-	-	104
	Kottarakkara	-	-	-	1	-	-	-	-	1
		-	-	-	23	-	-	-	-	23
	Kottayam	-	-	-	3	8	5	1	-	17
		-	-	-	142	180	86	117	-	525
	Kovalam	-	1	-	-	2	1	2	-	6
		-	40	-	-	66	29	58	-	193
	Kozhi Kode	-	1	1	3	7	2	1	2	17
		-	74	52	87	285	24	6	85	613
	Kumarakom	-	-	-	4	-	-	1	-	5
		-	-	-	65	-	-	37	-	102
	Kumili	-	-	-	1	3	-	-	-	4
		-	-	-	30	67	-	-	-	97
	Munnar	-	1	-	3	3	-	-	-	7
		-	38	-	88	103	-	-	-	229

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
	Palakkad	-	-	-	7	2	-	-	2	11
		-	-	-	204	33	-	-	64	301
	Pararoor	-	-	-	1	-	1	-	-	2
		-	-	-	28	-	10	-	-	38
	Meenangadi	-	-	-	-	1	-	-	-	1
		-	-	-	-	16	-	-	-	16
	Quilon	-	-	-	-	1	1	-	-	2
		-	-	-	-	18	14	-	-	32
	Pala	-	-	-	-	2	-	-	-	2
		-	-	-	-	12	-	-	-	12
	Sullan Battery	-	-	-	-	1	-	-	-	1
		-	-	-	-	12	-	-	-	12
	Peermade	-	-	-	1	-	-	-	-	1
		-	-	-	20	-	-	-	-	20
	Tellicherry	-	-	-	-	1	1	-	-	2
		-	-	-	-	24	14	-	-	38
	Punalur	-	-	-	1	-	-	-	-	1
		-	-	-	20	-	-	-	-	20
	Thekkady	-	-	2	1	2	1	1	-	7
		-	-	84	50	52	48	6	-	240
	Thiruvananthapuram	1	6	10	5	1	-	-	-	-
		-	57	447	406	185	45	-	-	1140
	Thadupuzha	-	-	-	-	-	2	-	-	2
		-	-	-	-	-	43	-	-	43
	Varkala	-	-	-	1	1	-	-	-	2
		-	-	-	20	15	-	-	-	35
	Trissur	-	-	-	5	5	1	-	-	11
		-	-	-	117	205	14	-	-	336
	Varapuzha	-	-	-	1	-	-	-	-	1
		-	-	-	22	-	-	-	-	22
	Waynad	-	-	-	1	1	1	-	-	3
		-	-	-	32	14	37	-	-	83
	Vytilla	-	-	-	-	1	-	-	-	1
		-	-	-	-	14	-	-	-	14
	Idukki	-	-	-	-	1	-	-	-	1
		-	-	-	-	10	-	-	-	10
	Mallapuram	-	-	-	-	2	-	-	-	2
		-	-	-	-	69	-	-	-	69

S. State/Place No.	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
Palghat	-	-	-	2		-	-	-	2
	-	-	-	46		-	-	-	46
(No. of Hotels)	2	7	15	80	89	31	11	5	240
(No. of Rooms)	252	469	862	2633	2518	852	282	207	8075

15 Madhya Pradesh

Bandhavgarh	-	-	-		1	-	-	-	1
	-	-	-		18	-	-	-	18
Bhopal	-	-	-	5	3	-	3	-	11
	-	-	-	190	94	-	186	-	470
Dhar	-	-	-	-	-	-	1	-	1
	-	-	-	-	-	-	16	-	16
Gwalior	-	-	-	2	-	1	1	-	4
	-	-	-	102	-	24	27	-	153
Indore	-	1	-	6	1	-	-	1	9
	-	78	-	297	43	-	-	62	480
Jabalpur	-	-	1	3	4	1	-	-	9
	-	-	52	149	166	24	-	-	391
Kanha	-	-	-	-	1	-	-	-	1
	-	-	-	-	19	-	-	-	19
Khajuraho	1	2	-	2	-	-	-	-	5
	102	138	-	54	-	-	-	-	294
Khandwa	-	-	-	-	2	-	-	-	2
	-	-	-	-	10	-	-	-	10
Munnar	-	-	-	1	-	-	-	-	1
	-	-	-	26	-	-	-	-	26
Mandla	-	-	-	-	-	1	-	-	1
	-	-	-	-	-	21	-	-	21
Raipur	-	-	-	3	1	1	-	-	5
	-	-	-	104	13	44	-	-	181
Bhilai	-	-	-	1	-	-	-	-	1
	-	-	-	42	-	-	-	-	42
(No. of Hotels)	1	3	1	23	13	4	5	1	51
(No. of Rooms)	102	216	52	964	363	113	229	62	2101

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
16 Maharashtra										
	Akola	-	-	-	1	-	-	-	-	1
		-	-	-	38	-	-	-	-	38
	Amaravati	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	10	-	-	10
	Aurangabad	-	3	-	-	2	2	-	2	9
		-	210	-	-	35	72	-	102	419
	Ahmad Nagar	-	-	1	-	-	1	-	-	2
		-	-	80	-	-	58	-	-	138
	Bilaspur	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	21	-	-	21
	Mumbai	16	6	-	33	46	9	-	-	126
		5254	901	-	1796	1591	284	-	-	10778
	Bordl	-	-	-	-	-	1	-	-	23
		-	-	-	-	-	15	-	-	106
	Chanderpur	-	-	-	1	1	-	-	-	2
		-	-	-	52	27	-	-	-	79
	Chandid	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	20	-	-	20
	Chiplon	-	-	-	1	-	-	-	-	1
		-	-	-	37	-	-	-	-	37
	Ellore	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	16	-	-	16
	Jalgaon	-	-	-	-	1	-	-	-	1
		-	-	-	-	28	-	-	-	28
	Karad	-	-	-	1	1	-	-	-	2
		-	-	-	28	36	-	-	-	64
	Khandala	-	-	-	2	2	1	-	-	5
		-	-	-	85	43	22	-	-	150
	Khopoli	-	-	-	-	1	-	-	-	1
		-	-	-	-	12	-	-	-	12
	Kolhapur	-	-	-	1	2	-	-	-	3
		-	-	-	28	28	-	-	-	56
	Kabhapur	-	-	-	-	3	-	-	1	4
		-	-	-	-	83	-	-	54	137
	Lonavala	1	-	1	2	2	-	-	2	8
		90	-	32	42	22	-	-	94	280

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
	Manor	-	-	-	-	-	2	-	-	2
		-	-	-	-	-	70	-	-	70
	Mahabaleshwar	-	-	-	2	2	-	-	1	5
		-	-	-	76	76	-	-	41	193
	Matheran	-	-	-	3	3	-	-	1	7
		-	-	-	142	124	-	-	25	291
	Nagpur	-	-	-	2	4	2	-	1	9
		-	-	-	152	117	31	-	42	342
	Nasik	-	1	-	5	5	3	-	2	16
		-	68	-	198	201	98	-	44	609
	Navi Mumbai	-	-	-	2	3	1	-	1	7
		-	-	-	110	100	24	-	33	267
	Panvel	-	-	-	1	-	-	-	2	3
		-	-	-	20	-	-	-	36	56
	Panchgani	-	-	-	1	3	1	-	-	5
		-	-	-	42	140	40	-	-	222
	Pune	2	5	6	7	13	17	1	1	52
		291	624	371	365	352	523	22	15	2563
	Pandharpur	-	-	-	1	-	-	-	-	1
		-	-	-	36	-	-	-	-	36
	Raigad	-	-	-	-	1	-	-	-	1
		-	-	-	-	12	-	-	-	12
	Ratnagiri	-	-	1	-	-	-	-	-	1
		-	-	32	-	-	-	-	-	32
	Roha	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	16	-	-	16
	Osmanabad	-	-	-	-	1	-	-	-	1
		-	-	-	-	38	-	-	-	38
	Shirdi	-	1	-	1	-	5	-	1	8
		-	100	-	143	-	196	-	68	507
	Sholapur	-	-	-	3	2	2	-	1	8
		-	-	-	93	45	38	-	30	206
	Sindudurg	-	-	-	2	-	-	-	-	2
		-	-	-	66	-	-	-	-	66
	Thane	-	-	-	-	3	2	-	2	7
		-	-	-	-	52	31	-	78	161
	Vidyanagar	-	-	-	-	1	-	-	-	1
		-	-	-	-	19	-	-	-	19

S. State/Place No.	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
Vihali	-	-	-	1	-	-	-	-	1
	-	-	-	36	-	-	-	-	36
Wardha Road	-	-	-	1	-	1	-	-	2
	-	-	-	98	-	19	-	-	117
(No. of Hotels)	19	16	21	74	102	55	1	-	332
(No. of Rooms)	5635	1903	1376	3683	3181	1604	22	-	18248

17 Manipur

(No. of Hotels)	0	0	0	0	0	0	0	0	0
(No. of Rooms)	0	0	0	0	0	0	0	0	0

18 Meghalaya

Shillong	-	-	1	2	-	1	-	-	4
	-	-	50	75	-	40	-	-	165
(No. of Hotels)	0	0	1	2	0	1	0	0	4
(No. of Rooms)	0	0	50	75	0	40	0	0	165

19 Mizoram

Aizwal	-	-	-	-	-	-	-	1	1
	-	-	-	-	-	-	-	28	28
(No. of Hotels)	0	0	0	0	0	0	0	1	1
(No. of Rooms)	0	0	0	0	0	0	0	28	28

20 Nagaland

	0	0	0	0	0	0	0	0	0
(No. of Hotels)	0	0	0	0	0	0	0	0	0
(No. of Rooms)	0	0	0	0	0	0	0	0	0

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
21 Orissa										
	Angul	-	-	-	-	2	-	-	-	2
		-	-	-	-	66	-	-	-	66
	Bhubaneswar	1	-	4	5	1	1	-	-	12
		70	-	262	207	48	32	-	-	619
	Cuttack	-	-	-	-	2	-	-	-	2
		-	-	-	-	63	-	-	-	63
	Dhenkanal	-	-	-	-	2	-	-	-	2
		-	-	-	-	66	-	-	-	66
	Puri	-	-	2	1	2	-	1	-	6
		-	-	88	34	118	-	34	-	274
	Rayagada	-	-	-	-	-	-	-	1	1
		-	-	-	-	-	-	-	32	32
	Rourkela	-	-	-	1	1	-	-	-	2
		-	-	-	22	16	-	-	-	38
	Jeypore	-	-	-	-	1	-	-	-	1
		-	-	-	-	31	-	-	-	31
	(No. of Hotels)	1	0	6	7	11	1	1	1	28
	(No. of Rooms)	70	0	350	263	408	32	34	32	1189

22 Punjab

	Amritsar	-	1	3	2	3	-	-	-	9
		-	78	101	111	66	-	-	-	356
	Abhor	-	-	-	-	2	-	-	-	2
		-	-	-	-	23	-	-	-	23
	Bathinda	-	-	-	2	6	-	-	-	8
		-	-	-	57	98	-	-	-	155

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
	Dera Bassi	-	-	-	-	2	-	-	-	2
		-	-	-	-	26	-	-	-	26
	Fardkot	-	-	-	-	-	2	-	-	2
		-	-	-	-	-	20	-	-	20
	Gurdaspur	-	-	-	-	3	-	-	-	3
		-	-	-	-	22	-	-	-	22
	Hoshiarpur	-	-	-	-	2	-	-	-	2
		-	-	-	-	32	-	-	-	32
	Jalandhar	-	1	4	10	11	-	-	-	26
		-	110	186	257	245	-	-	-	798
	Ludhiana	-	2	-	11	13	2	-	-	28
		-	237	-	368	289	27	-	-	921
	Pathankot	-	-	-	-	2	-	-	-	2
		-	-	-	-	62	-	-	-	62
	Patiala	-	-	-	2	3	-	-	-	5
		-	-	-	46	34	-	-	-	80
	Rajpura	-	-	-	-	2	-	-	-	2
		-	-	-	-	20	-	-	-	20
	Ropar	-	-	-	-	1	-	-	-	1
		-	-	-	-	13	-	-	-	13
	Malour	-	-	-	-	1	-	-	-	1
		-	-	-	-	10	-	-	-	10
	Mohali	-	-	-	-	2	-	-	-	2
		-	-	-	-	14	-	-	-	14
	Bamala	-	-	-	-	1	-	-	-	1
		-	-	-	-	11	-	-	-	11
	Moga	-	-	-	-	-	2	-	-	2
		-	-	-	-	-	20	-	-	20
	(No. of Hotels)	4	7	27	54	6	0	0	98	
	(No. of Rooms)	425	287	839	965	67	0	0	2583	

23 Rajasthan

Ajmer	-	-	-	1	-	-	-	-	-	1
	-	-	-	60	-	-	-	-	-	60
Alwar	-	-	-	1	1	-	-	-	-	2
	-	-	-	22	21	-	-	-	-	43

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heri-tage	Un-classified	Total
	Balasamand Lake Palace	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	-	-	35
	Behror	-	-	-	2	-	-	-	-	2
		-	-	-	45	-	-	-	-	45
	Bharatpur	-	-	-	-	-	-	-	-	1
		-	-	-	-	-	-	-	-	22
	Bikaner	-	-	-	1	-	-	-	-	5
		-	-	-	36	-	-	87	-	123
	Bijapur	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	11	-	11
	Chittorgarh	-	-	-	-	1	-	-	-	1
		-	-	-	-	24	-	-	-	24
	Deogarh	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	21	-	21
	Sri Ganga Nagar	-	-	-	-	2	-	-	-	2
		-	-	-	-	29	-	-	-	29
	Jaipur	4	3	1	10	8	2	6	-	34
		638	366	59	458	364	86	133	-	2104
	Jaisalmer	-	-	-	4	1	-	1	-	6
		-	-	-	186	43	-	43	-	272
	Jhunjhunu	-	-	-	2	-	-	-	-	2
		-	-	-	76	-	-	-	-	76
	Jodhpur	2	1	1	1	4	-	4	-	13
		187	122	62	24	77	-	127	-	599
	Khimsar	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	14	-	14
	Kumbhalgarh	-	-	-	1	-	-	-	-	1
		-	-	-	26	-	-	-	-	26
	Kota	-	-	-	2	3	-	-	-	5
		-	-	-	50	65	-	-	-	115
	Luni	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	19	-	19

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
	Mandawa	-	-	-	-	1	-	1	-	2
		-	-	-	-	55	-	51	-	106
	Mount Abu	-	-	-	1	4	-	3	-	8
		-	-	-	44	211	-	94	-	349
	Mukundgarh	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	46	-	46
	Neemrana	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	18	-	18
	Pachar	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	16	-	16
	Pushkar	-	-	-	1	-	-	1	-	2
		-	-	-	36	-	-	30	-	66
	Rohit Garh	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	17	-	17
	Samode	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	30	-	30
	Sardar Seemand	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	19	-	19
	Sariska	-	-	-	-	-	-	1	-	1
		-	-	-	-	-	-	18	-	18
	Sawai Madhopur	1	-	-	-	-	-	1	-	2
		25	-	-	-	-	-	16	-	41
	Shekhawati	-	-	-	-	1	-	-	-	1
		-	-	-	-	28	-	-	-	28
	Siliserh	-	-	-	-	1	-	-	-	1
		-	-	-	-	9	-	-	-	9
	Udiapur	1	-	1	6	7	-	4	-	19
		79	-	25	220	269	-	105	-	698
(No. of Hotels)		8	4	3	33	34	2	38	0	122
(No. of Rooms)		929	488	146	1283	1195	86	972	0	5099

S. State/Place No.	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
24 Sikkim									
Gangtok	-	-	3	1	-	-	1	-	5
	-	-	104	29	-	-	28	-	161
(No. of Hotels)	0	0	3	1	0	0	1	0	5
(No. of Rooms)	0	0	104	29	0	0	28	0	161

25 Tamil Nadu

Avinashi	-	-	-	1	-	-	-	-	1
	-	-	-	40	-	-	-	-	40
Chennai	3	6	9	39	18	8	-	6	89
	560	897	871	2592	709	470	-	156	6255
Chidambaram	-	-	-	-	-	1	-	-	1
	-	-	-	-	-	45	-	-	45
Coimbatore	-	-	-	4	2	4	-	1	11
	-	-	-	237	121	165	-	38	561
Coonor	-	-	-	1	1	-	-	-	2
	-	-	-	24	33	-	-	-	57
Gobichetti-palayam	-	-	-	-	-	1	-	-	1
	-	-	-	-	-	47	-	-	47
Covelong	1	-	-	-	-	-	-	-	1
	72	-	-	-	-	-	-	-	72
Coutrallam	-	-	-	-	-	1	-	-	1
	-	-	-	-	-	23	-	-	23
Palani	-	-	-	-	-	1	-	-	1
	-	-	-	-	-	42	-	-	42
Dindigul	-	-	-	-	-	1	-	-	1
	-	-	-	-	-	20	-	-	20
Erode	-	-	-	-	-	1	-	-	1
	-	-	-	-	-	42	-	-	42
Gingee	-	-	-	-	1	-	-	-	1
	-	-	-	-	22	-	-	-	22

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
	Honganekkol	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	30	-	-	30
	Kanchipuram	-	-	-	1	-	1	-	-	2
		-	-	-	27	-	27	-	-	54
	Karur	-	-	-	-	1	1	-	-	2
		-	-	-	-	31	31	-	-	62
	Kanya Kumari	-	-	-	2	-	1	-	1	4
		-	-	-	152	-	45	-	36	233
	Karaikudi	-	-	-	-	-	2	-	-	2
		-	-	-	-	-	70	-	-	70
	Kodai Kanal	-	1	-	2	1	1	-	-	5
		-	91	-	90	54	24	-	-	259
	Madurai	1	-	-	3	1	2	1	-	8
		63	-	-	118	51	102	34	-	368
	Mamallapuram	-	-	-	3	2	1	-	-	6
		-	-	-	148	67	48	-	-	263
	Nagapatnam	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	27	-	-	27
	Coorg	-	-	-	-	1	1	-	-	2
		-	-	-	-	48	20	-	-	68
	Theni	-	-	-	1	-	-	-	-	1
		-	-	-	32	-	-	-	-	32
	Theori	-	-	-	1	-	-	-	-	1
		-	-	-	32	-	-	-	-	32
	Tiruvanamalai	-	-	-	-	1	-	-	-	1
		-	-	-	-	39	-	-	-	39
	Nellore	-	-	-	2	-	-	-	-	2
		-	-	-	51	-	-	-	-	51
	Nilgaris	-	-	-	-	1	-	-	-	1
		-	-	-	-	15	-	-	-	15
	Mettupalayan	-	-	-	1	1	-	-	-	2
		-	-	-	28	26	-	-	-	54
	Nagarcoil	-	-	-	-	1	-	-	-	1
		-	-	-	-	32	-	-	-	32
	Namakkal	-	-	-	1	1	1	-	-	3
		-	-	-	33	24	24	-	-	81
	Neyveli	-	-	-	-	1	-	-	-	1
		-	-	-	-	24	-	-	-	24

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
	Palani	-	-	-	-	2	-	-	1	3
		-	-	-	-	84	-	-	45	129
	Pallachi	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	36	-	-	36
	Perumbavoor	-	-	-	-	1	-	-	-	1
		-	-	-	-	10	-	-	-	10
	Rameshwaram	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	45	-	-	45
	Salem	-	-	-	1	3	1	-	1	6
		-	-	-	52	136	20	-	58	266
	Thanjavur	-	-	-	2	1	1	-	-	4
		-	-	-	84	20	40	-	-	144
	Tiruchendur	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	30	-	-	30
	Tiruchirapally	-	-	1	1	-	2	-	2	6
		-	-	54	84	-	53	-	94	285
	Tirunelveli	-	-	-	1	-	1	-	-	2
		-	-	-	70	-	30	-	-	100
	Tirupur	-	-	-	2	1	-	-	1	4
		-	-	-	140	40	-	-	57	237
	Udagha mandalam	-	-	-	5	2	-	1	2	10
		-	-	-	403	46	-	40	88	579
	Velonkoni	-	-	-	-	-	-	-	1	1
		-	-	-	-	-	-	-	18	18
	Vellore	-	-	-	1	1	-	-	1	3
		-	-	-	30	32	-	-	32	94
	Yercaud	-	-	-	-	1	1	-	1	3
		-	-	-	-	33	13	-	81	127
	(No. of Hotels)	5	7	10	74	44	39	2	16	197
	(No. of Rooms)	695	988	925	4467	1699	1569	74	703	11120

26 Uttar Pradesh

Agra	3	3	2	8	6	-	-	-	1	23
	756	396	312	469	128	-	-	-	30	2091
Aligarh	-	-	-	-	1	-	-	-	-	1
	-	-	-	-	25	-	-	-	-	25

S. State/Place No.	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
Allahabad	-	-	1	-	3	-	-	-	4
	-	-	85	-	34	-	-	-	119
Balrampur	-	-	-	-	1	-	-	-	1
	-	-	-	-	20	-	-	-	20
Gaziabad	-	-	-	2	-	-	-	-	2
	-	-	-	88	-	-	-	-	88
Gajraula	-	-	-	1	-	-	-	-	1
	-	-	-	24	-	-	-	-	24
Gorakhpur	-	-	-	-	2	-	-	-	2
	-	-	-	-	60	-	-	-	60
Jhansi	-	-	-	2	-	1	-	-	3
	-	-	-	88	-	31	-	-	119
Kushinagar	-	-	-	1	-	-	-	-	1
	-	-	-	63	-	-	-	-	63
Kanpur	-	-	1	-	-	1	-	-	2
	-	-	86	-	-	19	-	-	105
Lucknow	1	3	1	4	-	-	-	-	9
	110	294	61	207	-	-	-	-	672
Mathura	-	-	-	2	-	-	-	-	2
	-	-	-	49	-	-	-	-	49
Moradabad	-	-	-	-	1	-	-	-	1
	-	-	-	-	20	-	-	-	20
Srawasti	-	-	-	2	-	-	-	-	2
	-	-	-	60	-	-	-	-	60
Fatehpursikri	-	-	-	-	1	-	-	-	1
	-	-	-	-	24	-	-	-	24
Noida	-	-	-	2	-	-	-	-	2
	-	-	-	62	-	-	-	-	62
Rampur	-	-	-	-	1	1	-	-	2
	-	-	-	-	22	22	-	-	44
Varanasi	1	1	2	5	2	-	1	-	12
	130	140	192	250	64	-	40	-	816
(No. of Hotels)	5	7	7	29	18	3	1	1	71
(No. of Rooms)	996	830	736	1360	397	72	40	30	4461

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
27 Uttaranchal										
	Almora	-	-	-	-	1	-	-	-	1
		-	-	-	-	10	-	-	-	10
	Dehradun	-	-	1	2	3	3	-	-	9
		-	-	30	68	70	51	-	-	219
	Haridwar	-	-	-	-	1	-	-	-	1
		-	-	-	-	72	-	-	-	72
	Haldwani	-	-	-	1	-	-	-	-	1
		-	-	-	30	-	-	-	-	30
	Mukteswar	-	-	-	-	1	-	-	-	1
		-	-	-	-	10	-	-	-	10
	Mussoorie	1	-	-	4	2	1	1	1	10
		90	-	-	166	102	24	121	39	542
	Nainital	-	-	1	3	2	1	2	0	9
		-	-	35	135	49	22	64	0	305
	Narender Nagar	-	-	-	2	-	-	-	-	2
		-	-	-	150	-	-	-	-	150
	Ram Nagar	-	-	-	2	-	-	-	-	2
		-	-	-	52	-	-	-	-	52
	Ranikhet	-	-	-	-	1	1	1	-	3
		-	-	-	-	20	26	13	-	59
	Rishikesh	-	-	-	-	1	-	-	-	1
		-	-	-	-	52	-	-	-	52
	Roberts Ganj	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	15	-	-	15
	(No. of Hotels)	1	0	2	14	12	7	4	1	41
	(No. of Rooms)	90	0	85	801	385	138	198	39	1516

28 West Bengal

	Asansol	-	-	-	1	-	-	-	-	1
		-	-	-	42	-	-	-	-	42
	Berahmpur	-	-	-	-	-	-	-	1	1
		-	-	-	-	-	-	-	27	27
	Bolapur	-	-	-	-	1	-	-	-	1
		-	-	-	-	32	-	-	-	32
	Kolkatta	4	5	5	7	7	2	-	0	30
		855	735	464	316	300	81	-	0	2751

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
	Darjeeling	-	-	-	5	5	-	5	-	15
		-	-	-	143	151	-	94	-	388
	Digha	-	-	-	1	1	-	-	-	2
		-	-	-	23	44	-	-	-	67
	Durgapur	-	-	-	2	-	-	-	1	3
		-	-	-	98	-	-	-	15	113
	Haldia	-	-	-	2	-	-	-	-	2
		-	-	-	63	-	-	-	-	63
	Kalimpong	-	-	1	-	-	-	-	-	1
		-	-	26	-	-	-	-	-	26
	Malda	-	-	-	2	1	-	-	1	4
		-	-	-	28	22	-	-	32	82
	Siliguri	-	-	1	3	2	-	-	-	6
		-	-	35	143	66	-	-	-	244
	Shantiniketan	-	-	-	3	-	-	-	-	3
		-	-	-	106	-	-	-	-	106
	(No. of Hotels)	4	5	7	26	17	2	5	3	69
	(No. of Rooms)	855	735	525	962	615	81	94	74	3941

29 Andaman & Nicobar

	Port Blair	-	1	-	-	4	1	-	-	6
		-	48	-	-	132	13	-	-	193
	(No. of Hotels)	0	1	0	0	4	1	0	0	6
	(No. of Rooms)	0	48	0	0	132	13	0	0	193

30 Chandigarh

	Chandigarh	-	-	2	2	7	-	-	-	11
		-	-	105	46	172	-	-	-	323
	(No. of Hotels)	0	0	2	2	7	0	0	0	11
	(No. of Rooms)	0	0	105	46	172	0	0	0	323

S. No.	State/Place	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Un-classified	Total
31 Daman & Diu										
	Daman & Diu	-	-	-	3	-	-	-	-	3
		-	-	-	134	-	-	-	-	134
	(No. of Hotels)	0	0	0	3	0	0	0	0	3
	(No. of Rooms)	0	0	0	134	0	0	0	0	134
32 Dadra & Nagar Haveli										
	Silvasa	-	-	-	3	-	1	-	-	4
		-	-	-	143	-	28	-	-	171
	(No. of Hotels)	0	0	0	3	0	1	0	0	4
	(No. of Rooms)	0	0	0	143	0	28	0	0	171
33 Lakshadweep										
	Bangaram	-	-	-	-	-	1	-	-	1
		-	-	-	-	-	30	-	-	30
	(No. of Hotels)	0	0	0	0	0	1	0	0	1
	(No. of Rooms)	0	0	0	0	0	30	0	0	30
34 Pondicherry										
	Pondicherry	-	-	-	3	-	1	-	-	4
		-	-	-	159	-	58	-	-	217
	(No. of Hotels)	0	0	0	3	0	1	0	0	4
	(No. of Rooms)	0	0	0	159	0	58	0	0	217
G.Total (No. of Hotels)		78	89	126	634	560	207	79	119	1892
(No. of Rooms)		17885	10982	8831	28783	18449	6765	2173	3902	97770

Source: Administrative Records of Hotels maintained by Department of Tourism

Note: Figures in the first and second lines indicate number of hotels and number of rooms respectively.

4. INDIAN HOTEL INDUSTRY SURVEY 2003-04 BY FH & RAI

Indian Hotel Industry Survey is conducted by the Federation of Hotel & Restaurant Association of India (FH & RAI). During the year 2003-2004, the survey covered 1109 Hotels (60,773 room) across various cities in India . Broadly the survey revealed that :

- Out of the 30 cities surveyed, the average occupancy of hotels was registered from 34.5% (Kullu-Manali) to 78.9% (Bangalore) during the year 2003-04 as against 34.1% (Aurangabad) to 72.4 % (Bangalore) during 2002-03;
- On an average, 75.0 percent of the guests were Indians and 25.0% Foreigners;
- Of the total guests, 58.0% were Business guests and 41.9% Leisure guests;
- Of all the foreign tourists surveyed, maximum were from UK(16.0%) followed by USA (12.7%), Germany (7.6%) and France (7.1%)

Following tables give details of Average Occupancy in 30 cities, Guest Analysis and Country of Origin of Foreign Guests.

TABLE-5.4

AVERAGE OCCUPANCY OF HOTELS IN 30 CITIES

City	Average Occupancy				
	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004
All India	51.7%	55.6%	53.2%	54.8%	59.7%
Agra	46.0%	55.4%	42.9%	42.2%	51.0%
Ahmedabad	51.9%	57.7%	59.9%	51.3%	57.0%
Aurangabad	36.4%	44.8%	ID	34.1%	63.0%
Bangalore	57.1%	72.1%	62.8%	72.4%	78.9%
Bhopal	51.3%	53.9%	ID	62.3%	59.6%
Kolkata	52.9%	66.7%	61.7%	63.6%	64.6%
Chennai	58.7%	75.1%	65.0%	63.9%	61.6%
Cochin	68.5%	68.2%	58.7%	57.6%	69.0%
Coimbatore	55.7%	56.4%	ID	ID	64.5%
Darjeeling	ID	26.3%	28.2%	ID	62.6%

City	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004
Goa	49.6%	57.1%	56.1%	60.2%	65.3%
Hyderabad	62.1%	71.4%	67.2%	71.0%	72.8%
Indore	53.6%	65.1%	77.5%	64.7%	61.4%
Jaipur	49.2%	52.3%	56.2%	56.9%	62.6%
Jodhpur	44.5%	34.7%	32.5%	37.4%	45.9%
Kullu-Manali	33.3%	44.4%	39.8%	ID	34.5%
Mount Abu	ID	ID	42.1%	38.1%	51.8%
Mumbai	59.5%	66.1%	63.8%	62.6%	66.3%
Mussourie	44.9%	52.9%	ID	ID	70.0%
Mysore	55.9%	52.5%	ID	51.1%	34.8%
New Delhi	60.1%	59.3%	55.9%	58.3%	69.1%
Nagpur	ID	55.0%	60.0%	57.2%	51.3%
Pune	58.3%	58.1%	58.0%	59.9%	62.1%
Shimla	28.4%	48.1%	43.6%	46.7%	45.0%
Thiruvanthapuram	41.1%	57.0%	55.4%	60.3%	51.1%
Udagamandalam (Ooty)	ID	ID	38.0%	ID	48.8%
Udaipur	41.2%	44.0%	44.3%	46.6%	45.7%
Varanasi	39.3%	46.9%	ID	ID	52.0%
Vadodara	ID	58.0%	43.5%	46.4%	62.5%
Vishakapatnam	63.8%	65.6%	56.6%	ID	70.0%

Source:- Indian Hotel Industry Survey 2003-04, FH&RAI.
ID:-Insufficient Data

TABLE-5.5
GUEST ANALYSIS
2003-2004

Composition	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Other	All India Average
Number of responses	34	27	46	255	154	44	29	112	701
Domestic Guests(% age)	48.8	62.8	69.4	79.0	83.1	84.4	46.8	80.4	75.0
Foreign Guests(% age)	51.2	37.2	30.6	21.0	16.9	15.6	53.2	19.6	25.0
Total(% age)	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Total Business Guest*(% age)	65.2	61.8	67.2	8.5	60.6	49.3	28.9	51.7	58.0
Total Leisure	34.8	38.2	32.8	41.7	39.4	50.7	71.1	48.3	41.9
Guest(% age) Total(% age)	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Avg.Stay of Domestic Guests(Days)	2.0	1.9	2.5	2.4	2.5	2.7	6.4	2.2	2.6
Avg.Stay of Foreign Guests(Days)	3.1	3.7	4.3	3.1	2.3	3.1	3.3	2.9	3.2
Avg. Stay of Business Guests(Days)	2.0	1.9	2.2	2.1	1.8	2.6	1.6	2.3	2.0
Avg.Stay of Leisure Guests (Days)	3.1	2.2	2.4	2.2	2.8	2.5	1.8	2.0	2.4
Percentage of Repeat Guests	46.7	37.0	38.7	54.3	38.2	59.3	20.0	45.0	45.5

*Total Business Guest include Airline Crew

Source- Indian Hotel Industry Survey 2003-2004, Federation of Hotel & Restaurant Association of India

TABLE-5.6

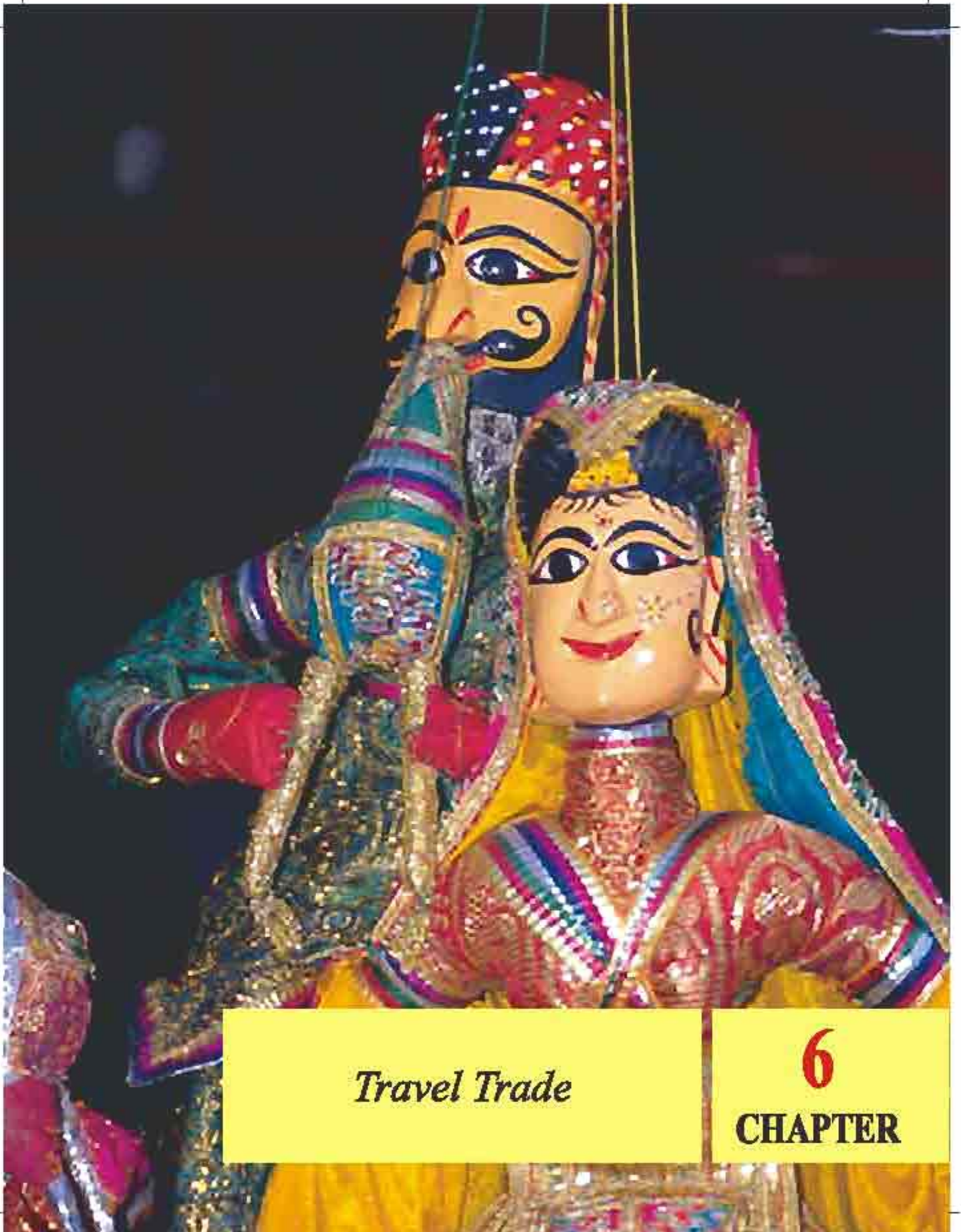
**COUNTRY OF ORIGIN OF GUESTS
2003-2004**

Composition	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Other	All India Average
Number of responses	33	26	41	127	55	13	26	32	353
ASEAN*	4.0	4.0	5.5	7.4	8.9	7.5	1.2	4.8	6.1
Australia (%)	2.7	2.5	2.8	2.8	3.9	2.4	5.7	4.2	3.3
Canada (%)	2.3	2.3	5.0	3.0	4.1	3.1	2.6	4.3	3.4
Caribbean (%)	1.0	0.2	0.3	0.2	0.6	0.4	0.0	0.1	0.3
China (%)	1.5	1.7	1.9	2.3	1.7	1.3	1.2	1.2	1.8
France (%)	6.8	6.0	6.2	6.2	5.0	3.5	18.1	8.8	7.1
Germany (%)	6.6	6.9	7.7	7.8	6.2	5.1	11.7	8.4	7.6
Japan (%)	6.5	3.9	7.3	5.1	3.6	6.2	3.2	4.5	5.0
Middle East (%)	3.8	4.1	1.6	2.7	6.6	2.8	0.9	3.9	3.4
Other European(%)	8.5	9.8	5.8	8.3	11.1	5.5	13.5	8.6	8.9
Russia (%)	2.9	7.0	5.4	3.1	2.4	2.7	1.9	2.8	3.4
SAARC**(%)	4.0	4.6	8.4	8.5	9.6	27.9	1.0	7.5	8.0
South Africa(%)	0.8	1.7	2.2	2.0	1.2	2.2	0.6	3.2	1.8
U.K. (%)	17.9	16.7	16.1	16.6	12.4	15.0	20.4	14.2	16.0
USA (%)	17.6	12.0	10.4	14.0	11.3	7.0	12.0	11.4	12.7
Other (%)	13.3	16.7	13.5	10.1	11.5	7.5	6.0	12.2	11.3
Total*(%)	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source : Indian Hotel Industry Survey 2003-2004) Federation of Hotel & Restaurant Association of India.

* ASEAN: Association of South East Asean Nations

** SAARC: South Asian Association for Regional Co-operation



Travel Trade

6

CHAPTER

TRAVEL AGENTS, TOUR OPERATORS AND TOURIST TRANSPORT OPERATORS

In order to encourage quality standards and services, the Ministry of Tourism approves travel agents, tour operators, tourist transport operators and adventure tour operators in the country, as per the guidelines (Appendix -IV to VII). As on 31st December 2004, 223 travel agents, 308 tour operators, 175 tourist transport operators and 13 adventure tour operators are registered with Ministry of Tourism. The State-wise distribution of these units is given in the table below:

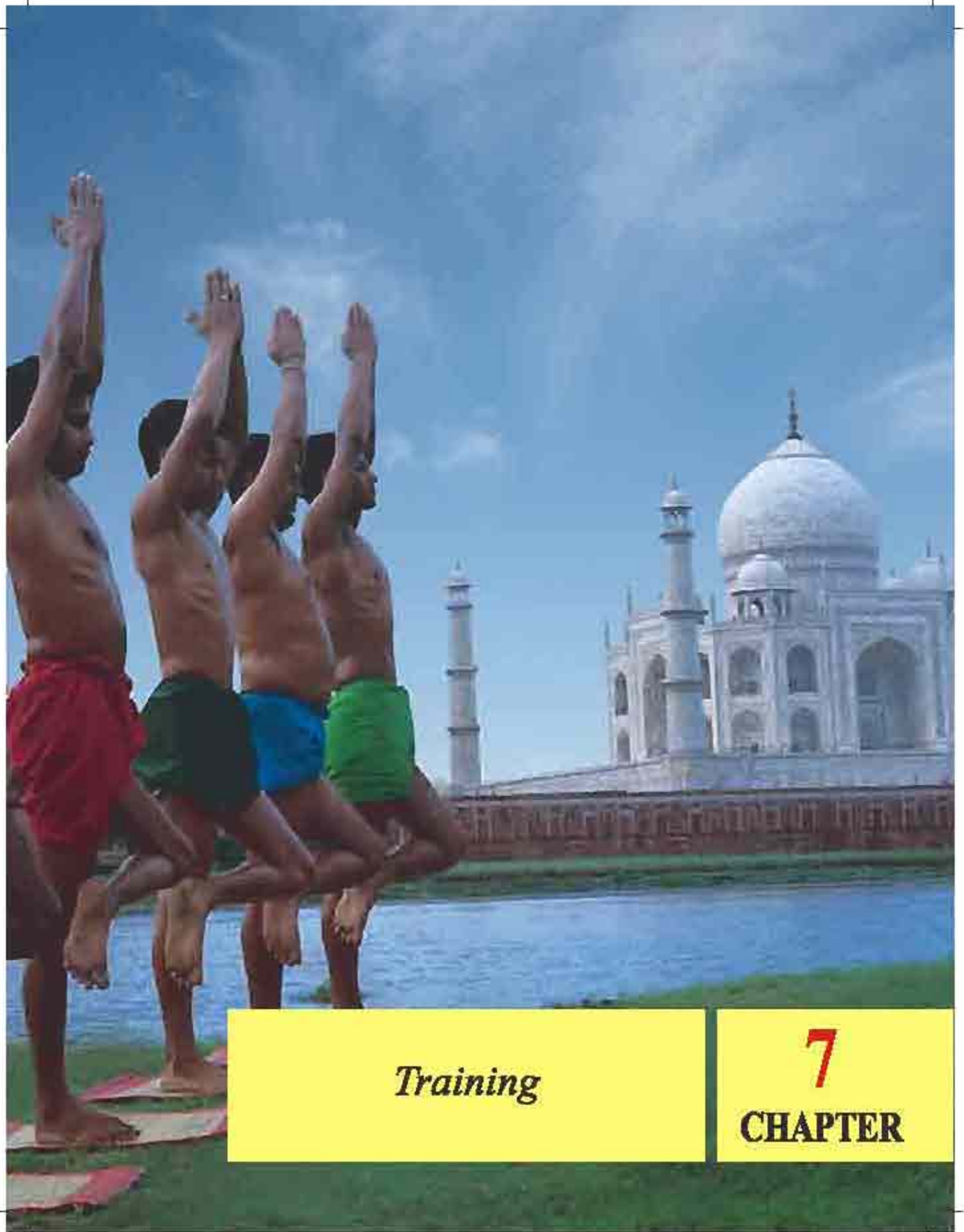
TABLE-6.1

STATE-WISE NUMBER OF RECOGNISED TOURIST TRANSPORT OPERATORS, TRAVEL AGENCIES, TOUR OPERATORS AND ADVENTURE TOUR OPERATORS

Sr. No.	State/UT	Tour Operators	Travel Agencies	Tourist Transport Operators	Adventure Tour Operators
1.	Andhra Pradesh	4	7	7	-
2.	Arunachal Pradesh	-	-	-	-
3.	Assam	5	-	1	-
4.	Bihar	1	-	-	-
5.	Chhattisgarh	-	-	-	-
6.	Goa	7	-	2	1
7.	Gujarat	-	3	2	-
8.	Haryana	7	-	-	-
9.	Himachal Pradesh	-	-	-	-
10.	Jammu & Kashmir	5	1	-	-
11.	Jharkhand	-	-	-	-
12.	Karnataka	3	15	12	-
13.	Kerala	11	1	17	-
14.	Madhya Pradesh	1	-	2	-
15.	Maharashtra	26	42	14	-
16.	Manipur	-	-	-	-
17.	Meghalaya	-	-	-	-
18.	Mizoram	-	-	-	-
19.	Nagaland	1	-	-	-

Sr. No.	State/UT	Tour Operators	Travel Agencies	Tourist Transport Operators	Adventure Tour Operators
20.	Orissa	4	-	-	-
21.	Punjab	-	3	3	-
22.	Rajasthan	4	1	9	-
23.	Sikkim	-	-	-	-
24.	Tamil Nadu	15	25	22	-
25.	Tripura	-	-	-	-
26.	Uttar Pradesh	4	5	5	-
27.	Uttaranchal	-	1	-	-
28.	West Bengal	4	15	1	1
29.	Andaman & Nicobar	-	1	-	-
30.	Chandigarh	-	1	3	-
31.	Dadra & Nagar Haveli	-	-	-	-
32.	Daman & Diu	-	-	-	-
33.	Delhi	206	99	73	11
34.	Lakshadweep	-	-	-	-
35.	Pondicherry	-	3	2	-
	Total	308	223	175	13

Source:-Administrative Records of Department of Tourism.



Training

7
CHAPTER

7.1 INDIAN INSTITUTE OF TOURISM & TRAVEL MANAGEMENT

The Indian Institute of Tourism and Travel Management (IITTM) was established as a registered society in 1983 at New Delhi under the Ministry of Tourism with the objective of developing and promoting education, training and research in the field of travel and tourism. In August 1992, Institute was shifted to Gwalior and is now functioning from its own campus at Govindpuri, Gwalior-474011.

Since 1995-96, IITTM started full-time one-year Diploma in Tourism Management (DTM) programme with the approval of All Indian Council of Technical Education (AICTE), New Delhi. In 1996-97, Eastern Regional Centre, Bhubaneshwar was established with the same DTM programme. Besides this, the Institute also undertakes various courses like Guide Training courses, UGC Refresher Courses for University and College teachers, etc.

Orientation Programme for officers posted in Indiatourism Offices abroad and Officers of the State Governments and Tourism Development Corporations are also organised by IITTM, on request by Ministry of Tourism and State Governments.

At present, the institute is running three regular courses viz Bachelor of Tourism Management (BTM-Honours) a three year course, Master of Business Administration (MBA), a two year course and Post Graduate Diploma in Tourism Management (PGDTM), a one year course. Besides the short duration courses being arranged by the Institute, it is also running a PG Diploma in Tourism & Travel Industry Management at its nine chapters situated at Delhi, Kolkatta, Lucknow, Guwahati, Trivandrum, Ahemdabad, Ranchi, Jaipur and Dehradun.

Following table gives statistical information about number of students enrolled in various courses, being offered by the Institute at its Gwalior and Bhubaneshwar Centres:

Number of Students on-roll			
Course	Gawalior	Bhubaneshwar	Total
1. Bachelor of Tourism (Hons.)	174	90	264
Ist Year	48	29	77
II Year	65	33	98
III Year	61	28	89
2. PG Diploma in Tourism Management.	59	50	109
3. Master of Business Admn.	78	--	78
Ist Year	41	--	41
II Year	37	--	37

7.2 HOTEL MANAGEMENT AND CATERING INSTITUTIONS

There are 21 Central Government sponsored Institutes of Hotel Management, 3 State Government sponsored Institutes of Hotel Management and 6 Food Craft Institutes offering specialized courses in hotel management and catering in the country. Institutes of Hotel Management offer M.Sc. Hospitality Administration; B.Sc. Hospitality and Hotel Administration; P.G. Diploma and other Certificate Courses. Food Craft Institutes offer 1½ Year Diploma Programs in Food Production; F&B Service; House Keeping Operation; Front Office Operation and Bakery & Confectionery. A list of Hotel Management Institutes and Food Craft Institutes is given at Appendix-XIV. All these Institutes are affiliated to the National Council for Hotel Management at apex level which regulates academics for all the Institutes. The Council conducts common examination for all the courses that the affiliated Institutes offer. The M.Sc. and B.Sc. Programs are offered in collaboration with Indira Gandhi National Open University for which certification is jointly carried out by the University. Certification for all other Diploma and Certificate Courses is done by the National Council. Details of courses offered by Institutes of Hotel Management and Food Craft Institutes, entry level qualification, duration, students on role and out turn are given in following tables

TABLE 7.1

DETAILS OF COURSES OFFERED BY IHMs/FCIs

Sl. No.	Course	Duration	Qualification	Age Limit	Institute where course is available
1.	M.Sc. Hospitality Administration	2 Years	Degree in HMCT/ Diploma in HMCT with any other Degree	-	Institutes of Hotel Management at: Bangalore, Delhi (Pusa) and Mumbai
2.	B.Sc. Hospitality And Hotel Administration	3 Years	Class XII of 10+2 system or equivalent	22 Years	Institutes of Hotel Management at: Ahmedabad, Bangalore, Bhopal, Bhubaneswar, Chandigarh, Chennai, Delhi (Pusa), Delhi (Lajpatnagar), Gangtok, Goa, Gwalior, Gurdaspur, Guwahati, Hyderabad, Jaipur, Jodhpur, Kolkata, Lucknow, Mumbai, Patna, Shimla, Srinagar, Shillong and Thiruvananthapuram
3.	Post Graduate Diploma In Accommodation Operation & Management	1½ Years	Graduation in any System	25 Years	Institutes of Hotel Management at: Bhubaneswar, Chennai, Delhi (Pusa), Gwalior, Hyderabad, Kolkata, Mumbai, Shimla and Trivandrum
4.	Post Graduate Diploma in Dietetics and Hospital Food Service	1 Year	Graduate with Science or Bachelor in Home Science	25 Years	Food Craft Institute at : Faridabad Institutes of Hotel Management at: Chennai, Delhi (Pusa) and Mumbai
5.	Diploma In Food Production	1½ Years	10+2 or equivalent	22 Years	Institutes of Hotel Management at: Chennai, Gangtok, Jodhpur and Patna Food Craft Institutes at: Ajmer, Chandigarh, Darjeeling, Faridabad, Udaipur and Pondicherry
6.	Diploma in F&B Service	1½ Years	10+2 or equivalent	22 Years	Institutes of Hotel Management at: Delhi (Pusa), Gangtok and Jodhpur Food Craft Institutes at: Ajmer, Chandigarh, Darjeeling, Faridabad, Udaipur and Pondicherry
7.	Diploma in Front Office	1½ Years	10+2 or equivalent	22 Years	Institute of Hotel Management at Chennai and Jodhpur Food Craft Institutes at: Ajmer, Chandigarh, Darjeeling and Udaipur
8.	Diploma in House Keeping	1½ Years	10+2 or equivalent	22 Years	Food Craft Institutes at: Ajmer, Chandigarh, Udaipur and Pondicherry
9.	Diploma in Bakery & Confectionery	1½ Years	10+2 or equivalent	22 Years	Institutes of Hotel Management at: Chennai and Delhi (Pusa) Food Craft Institutes at: Chandigarh and Faridabad
10.	Craftsmanship Course in Food Production	1½ Years	10 th Class pass of 10+2	22 Years	Institutes of Hotel Management at: Bhopal, Bhubaneswar, Chennai, Delhi (Pusa), Goa, Gwalior, Kolkata, Mumbai, Shimla and Trivandrum
11.	Craftsmanship Course in F&B Service	24 Week	10 th Class pass of 10+2	22 Years	Institutes of Hotel Management at: Bhubaneswar, Chennai, Goa, Hyderabad, Kolkata and Shimla
12.	Certificate Course in Hotel & Catering Management	6 Months	Class XII of 10+2 system or equivalent	28 years	Institutes of Hotel Management at: Chennai and Mumbai

TABLE 7.2

**INSTITUTES OF HOTEL MANAGEMENT, CATERING TECHNOLOGY
& APPLIED NUTRITION**

STUDENTS ON ROLL IN B. Sc. PROGRAM DURING 2004-2005

Sl. No	Institute	Actual No. of students admitted in 1st year	No. of students in 2nd Year	No. of students in 3rd Year	Total No. of students in all three years
1.	Ahmedabad	139	126	108	373
2.	Bangalore	178	144	152	474
3.	Bhopal	187	177	142	506
4.	Bhubaneswar	159	150	128	437
5.	Chandigarh	148	160	143	451
6.	Chennai	154	141	137	432
7.	Delhi Pusa	166	144	115	425
8.	Delhi Lajpatnagar	62	43	38	143
9.	Gangtok	39	38	14	91
10.	Goa	167	145	141	453
11.	Gurdaspur	124	121	80	325
12.	Guwahati	95	86	58	239
13.	Gwalior	127	133	101	361
14.	Hyderabad	152	151	135	438
15.	Jaipur	113	108	100	321
16.	Jodhpur	66	44	28	138
17.	Kolkata	233	184	173	590
18.	Lucknow	166	130	132	428
19.	Mumbai	190	179	181	550
20.	Patna	98	60	24	182
21.	Shimla	122	96	50	268
22.	Srinagar	15	23	15	53
23.	Shillong	31	24	16	71
24.	Trivandrum	120	115	115	350
	Total	3051	2722	2326	8099

TABLE 7.3

**STUDENTS ON ROLL IN DIPLOMA COURSES FOR 2004-2005
OFFERED BY IHMs/FCIs**

Sl. No	Institute	Food Production	Front Office	House Keeping	F & B Service	Bakery & Confectionery
1.	IHM, Delhi - Pusa	-	-	-	28	29
2.	IHM, Chennai	74	05	-	17	28
3.	IHM, Patna	18	-	-	-	-
4.	IHM, Jaipur	-	-	20	26	-
5.	IHM, Gangtok	18	-	-	10	-
6.	IHM, Jodhpur	26	26	-	26	-
7.	FCI, Ajmer	29	30	31	30	-
8.	FCI, Chandigarh	70	35	35	70	30
9.	FCI, Darjeeling	33	19	-	18	-
10.	FCI, Faridabad	38	-	-	37	20
11.	FCI, Udaipur	33	24	22	30	-
12.	FCI, Pondicherry	27	-	15	25	-
	Total:	366	139	123	317	107

TABLE 7.4

**INSTITUTE OF HOTEL MANAGEMENT,
CATERING TECHNOLOGY AND APPLIED NUTRITION**

**OUT-TURN OF STUDENTS IN HOTEL MANAGEMENT & CATERIN TECHNOLOGY
INSTITUTES DURING 2003-2004**

Sl. No.	Institute	3 rd Year of B.Sc. Program	P.G. Diploma in Accommodation Operation	Craft Course in Food Production	Craft Course in F&B Service	P.G. Diploma Course in Dietetics	Certificate in Hotel & Catering Management
1.	Ahmedabad	87	-	-	-	-	-
2.	Bangalore	99	-	-	-	-	-
3.	Bhopal	97	-	29	-	-	-
4.	Bhubaneswar	107	27	27	21	-	-
5.	Calcutta	142	20	27	35	-	-
6.	Chandigarh	80	-	-	-	-	-
7.	Chennai	82	10	75	20	08	07
8.	Gangtok	16	-	-	-	-	-
9.	Goa	135	-	52	24+21	-	-
10.	Gurdaspur	22	-	-	-	-	-
11.	Guwahati	82	-	-	-	-	-
12.	Gwalior	84	10	22	-	-	-
13.	Hyderabad	111	20	42	21+9	-	-
14.	Jaipur	72	-	-	-	-	-

Sl. No.	Institute	3 rd Year of B.Sc. Program	P.G. Diploma in Accommodation Operation	Craft Course in Food Production	Craft Course in F&B Service	P.G. Diploma Course in Dietetics	Certificate in Hotel & Catering Management
15.	Jodhpur	18	-	-	-	-	-
16.	Lucknow	115	-	-	-	-	-
17.	Mumbai	176	29	63	24+24	29	10
18.	New Delhi-Pusa	125	08	26	-	21	-
19.	New Delhi Laj'ngr	30	-	-	-	-	-
20.	Patna	26	-	-	-	-	-
21.	Shillong	-	-	-	-	-	-
22.	Shimla	30	20	48	10+8	-	-
23.	Srinagar	21	-	-	-	-	-
24.	Thiruvananthapuram	112	26	26	-	-	-
25.	FCI Faridabad	-	33	-	-	-	-

TABLE 7.5**COURSE-WISE OUT-TURN OF
STUDENTS IN 2003-2004 DIPLOMA COURSES**

Sl. No	Institute	Food Production	Front Office	House Keeping	F & B Service	Bakery & Confectionery
1.	IHM, Delhi - Pusa	-	-	-	20	26
2.	IHM, Chennai	28	-	-	-	37
3.	IHM, Patna	11	-	-	-	-
4.	IHM, Ahmedabad	16	-	-	-	-
5.	IHM, Gangtok	06	-	-	06	-
6.	IHM, Jodhpur	18	18	-	16	-
7.	FCI, Ajmer	16	16	11	20	-
8.	FCI, Chandigarh	64	29	22	57	31
9.	FCI, Darjeeling	22	10	-	09	-
10.	FCI, Faridabad	39	-	-	35	13
11.	FCI, Udaipur	17	16	07	17	-
12.	FCI, Pondicherry	26	-	16	23	-



Plan Outlays

8

CHAPTER

ANNUAL PLAN OUTLAYS AND FINANCIAL ASSISTANCE PROVIDED TO STATES

The Annual Plan 2005-06 aims at positioning tourism as a major engine of economic growth and harnessing its direct and multiplier effects for employment and poverty eradication in an environmentally sustainable manner. The Plan activities of the Ministry of Tourism essentially relate to the following:

- (i) Infrastructure Development
- (ii) Product Development
- (iii) Human Resource Development
- (iv) Promotion and Marketing
- (v) Market Research and Information Technology; and
- (vi) Monitoring and Evaluation

Since most of the infrastructural components and delivery systems are within the purview of the State Governments or private sector, the infrastructure for tourism is mainly being developed by providing financial assistance to State/UT Governments, and by providing various incentives to private entrepreneurs. The following tables give detailed Annual Plan Outlays for the Ministry of Tourism for the Annual Plan 2004-05 and 2005-06 as also State wise financial assistance provided during the year 2004-05.

TABLE 8.1

**ANNUAL PLAN OUTLAY (2004-05)
MINISTRY OF TOURISM**

S.No.	Name of Scheme	(Rs. In Millions) Annual Plan (2004-05) Budget Estimates
1	2	3
I.	Central Sector Schemes (CS)	
1.1	1. Externally Aided Project 2. UNDP Endogenous Projects	75.00 25.00
1.2	Assistance to IHMs/FCIs/IITTM/NIWS/NIAS /NCHMCT	250.00
1.3	Capacity Building for Service Providers	30.00
1.4	Overseas Promotion and Publicity including Market Development Assistance	900.00
1.5	Domestic Promotion and Publicity including Hospitality	140.00
1.6	Incentives to Accommodation infrastructure	100.00
1.7	Construction of Building for IISM at Gulmarg Kashmir (J&K Package)	60.00
1.8	Total – CS Schemes (1.1 - 1.7)	1580.00
II	Centrally Sponsored Schemes (CSS)	
2.1	Computerisation and information Technology	170.00
2.2	Market Research including 20 years perspective plan	30.00
2.3	Integrated Development of Tourist Circuits	850.00
2.4	Product / Infrastructure and Destination Development	1400.00
2.5	Assistance for Large Revenue Generating Projects	180.00
2.6	Revival of Tourism in J & K (J & K Package)	90.00
2.7	Tourism Infrastructure Development Fund	200.00
2.8	Total CSS Schemes (2.1– 2.7)	2920.00
2.9	Total -CS & CSS Schemes (1.8 + 2.8)	4500.00
III.	10% Lump sum provision for NE Region & Sikkim Capital Revenue	350.00 150.00
3.1	Total North East Region & Sikkim	500.00
3.2	Grand Total (2.9 + 3.1)	5000.00

TABLE 8.2

ANNUAL PLAN OUTLAY (2005-06)
MINISTRY OF TOURISM

S.No.	Name of Scheme	(Rs. In Millions) Annual Plan (2004-05) Budget Estimates
1	2	3
I.	Central Sector Schemes (CS)	
1.1	1. Externally Aided Project(Buddhist Centres) 2. UNDP Endogenous Projects	10.75 3.25
1.2	Assistance to IHMs/FCIs/IITTM/NIWS /NIAS /NCHMCT	30.00
1.3	Capacity Building for Service Providers	15.00
1.4	Overseas Promotion and Publicity including Market Development Assistance	140.00
1.5	Domestic Promotion and Publicity including Hospitality	70.00
1.6	Incentives to Accommodation Infrastructure	10.00
1.7	Construction of Building for IISM at Gulmarg Kashmir (J&K Package)	6.00
1.8	Market Research including 20 years perspective plan	3.00
1.9	Assistance for Large Revenue Generating Project	30.00
1.10	Computerization and information Technology	20.00
1.11	Total – CS Schemes (1.1 -1.10)	338.00
II	Centrally Sponsored Schemes (CSS)	
2.1	Product / Infrastructure Development for Destination and Circuits	359.00*
2.2	Tourism Infrastructure Development Fund	10.00
2.3	Total CSS Schemes (2.1 – 2.2)	369.00
2.4	Total -CS & CSS Schemes (1.11 + 2.3)	707.00
III.	10% Lump sum provision for NE Region including Sikkim	79.00
3.1	Total -(North East Region & Sikkim)	79.00
3.2	Grand Total (2.4 + 3.1)	786.00

- This includes Rs.25.00 crore each for Agra and Varanasi to improve road connectivity from National Highways and Airports to Heritage sites and infrastructure at these sites.
- This also includes Rs. 5.00 Crores earmarked for development of tourist village in J & K Rs.10.00 Crore for assistance to development authorities for J&K and Rs. 5.00 Crore to establish a new circuit fo J & K.

TABLE 8.3
STATE-WISE TOURISM PROJECTS SANCTIONED
DURING THE YEAR 2005-2006

S.No.	State	No. of projects sanctioned	Amount Sanctioned (Rs.in Lakh)	Amount Released (Rs.in Lakh)
1.	Andhra Pradesh	4	2505.82	1604.50
2.	Assam	8	2125.00	1686.45
3.	Arunachal Pradesh	10	2240.16	1655.21
4.	Bihar	1	768.12	614.50
5.	Chattisgarh	5	1252.87	1002.56
6.	Goa	1	10.00	8.00
7.	Gujarat	3	1253.31	562.64
8.	Haryana	5	612.45	506.51
9.	Himachal Pradesh	4	1635.00	908.00
10.	J&K	22	6656.01	5320.91
11.	Jharkhand	3	11.70	9.36
12.	Karnataka	6	1648.23	969.57
13.	Kerala	11	4829.88	3865.30
14.	Madhya Pradesh	11	3037.39	2419.54
15.	Maharashtra	8	2070.04	1657.99
16.	Manipur	1	25.00	20.00
17.	Mehgalaya	1	5.00	4.00
18.	Mizoram	9	2268.41	1686.29
19.	Nagaland	9	2528.97	1873.17
20.	Orissa	8	1200.47	960.37
21.	Punjab	2	10.00	8.00
22.	Rajasthan	5	2084.69	1680.66
23.	Sikkim	14	2844.56	2213.74
24.	Tamil Nadu	18	4144.08	2976.06
25.	Tripura	3	716.26	569.43
26.	Uttranchal	12	2723.00	2178.18
27.	Uttar pradesh	15	3124.22	2497.92
28.	West Bengal	2	975.00	780.00
29.	Andaman & Nocobar	0	0.00	0.00
30.	Chandigarh	0	0.00	0.00
31.	Dadar Nagar Haveli	2	29.79	25.92
32.	Delhi	2	30.00	24.00
33.	Daman &Diu	3	182.70	144.95
34.	Lakshadweep	0	0.00	0.00
35.	Pondicherry	2	469.39	375.51
	Total	210	54017.52	40809.24

Note:- This includes the projects relating to Circuits, Destinations, Large Revenue Generating Projects, Rural Tourism (Software and Hardware) Projects, IT Events, Fair & Festivals Projects.

Source:-Planning Division, Department of Tourism.



Surveys & Studies

9
CHAPTER

9.1 CRUISE TOURISM --- POTENTIAL & STRATEGY STUDY

The Ministry of Tourism commissioned M/s CRISIL Ltd. For conducting a study on Cruise Tourism with the objective of assessing the potential of Cruise Tourism in India, and to make recommendations to develop India into a major cruise market for domestic, regional and international cruise.

This study has made a comprehensive analysis of the Cruise Tourism sector at the global level as well as the Indian scenario. While the industry has reached a fair level of maturity globally it is as yet in its infancy in India. As such India would be entering into a market already dominated by strong cruise tourism players and markets. However, India even as a late entrant would have important advantages:

- India's reputation as an enchanting, exotic, historic and beautiful destination would enable the country to make an instant international cruise positioning and move into the 'cruise destination' market. Cruise operators and liners are more than ever searching for new destinations and itineraries.
- India's long coast line and strong port positioning imparts a natural advantage to the country to attract international cruise lines.
- India's positioning in South East Asia and its proximity to already popular cruise destinations like Singapore, Thailand, Bangkok, Colombo etc. would enable strong cruise circuits to be created over a period of time.
- India's strong domestic tourism sector would enable the country to achieve a strong domestic cruise sector that could complement the growth and support viability.
- India's impressive growth in the tourism sector would impart an important advantage to its cruise tourism positioning. It would be important to remember that these two would mutually strengthen each other enormously.
- The cruise ports selected for development are also strong tourism States, especially Kerala, Goa and Chennai. This could provide an important platform for cruise tourism to takeoff.

However, to benefit from the strengths as outlined above, it would be crucial for India to learn important lessons from global precedents in the cruise sector as well as integrate this learning with the tourism sector lessons we have derived over the past decade.

The key recommendations for development of cruise tourism in India, which have emerged from the market interactions and derived from the study are presented in the following paras.

Key recommendations to make India a strong cruise destination

I. CREATE THE CRUISE TERMINALS

1. Develop good infrastructure at identified Ports

The first and primary objective of the government should be to provide acceptable standards of infrastructure and passenger services at the selected ports. The development of the designated cruise ports could be in stages as follows:

Phase 1 :

- i. Create dedicated cruise terminals at Mumbai, Cochin and Goa
- ii. Upgrade port facilities at exotic locales like Lakshadweep & Andamans and Chennai

Phase 2 :

- i. Create dedicated cruise terminals at Chennai, Mangalore and Tuticorin
- ii. Explore potential of other ports like Porbandar & Kandla in the West Coast: and Vishakapatnam, Calcutta & Paradeep in the East Coast

Along with developing the identified cruise ports, developing exotic destinations would greatly enhance the value of Indian Cruises and bring in the 'exotic' element which would be imperative to position the Indian Cruise sector globally. Market interactions reveal that Cruise operators are keen on including these destinations as ports of call however in absence of basic infrastructure it is impossible to do so. Similarly, to realize the cruise potential that exists for India over the next 26 year period, it would be necessary to identify and develop the other Indian Ports having cruise tourism potential including the Porbandar & Kandla Port in Gujarat, the Vishakapatnam Port in Andhra Pradesh, the Calcutta Port, the Paradeep Port in Orissa. Each of these states has enormous tourism potential that can be effectively tapped for cruise tourism if accessibility and availability can be ensured through creation of necessary port based infrastructure.

Recommendations to reinforce port development

The following would constitute the key recommendations towards developing port infrastructure:

- **Cruise Terminals should be an integral part of Port Master Plans**

The concerned Port authorities should prepare detailed master plans for the development of these ports, which should include the strategy for development through private sector participation. In the development of the cruise terminals the Tourism department may support Port Authorities by making available the Central Financial Assistance for large revenue generating projects and other assistance available for Development of Tourism Circuits.

To be globally competitive and have a sound positioning in the worldwide cruise tourism market, India should plan for dedicated cruise terminals and berths. This would represent a long term goal but would need to figure in the master plans of the individual ports.

- **Dedicated terminals would need to address security concerns and facilitation**

Cruise Terminals located within Cargo Port area create security issues. In creating dedicated terminals, this aspect has to be addressed and resolved. Also hospitality related aspects to enable the necessary facilitation services to the cruise tourists would have to be built into the cruise terminal development plans.

- **Terminal Plans would need to be developed in consultation with key players**

In finalizing the cruise terminal development plan, inputs from cruise lines, tour agents, developers would ensure that the concerns of the key stakeholders are adequately addressed. This would ensure the long term success of the terminal.

- **Initiate Feasibility Studies**

Feasibility studies for individual cruise terminals would need to take into account the port specific developmental aspects duly incorporating capital cost towards dredging based on geographical features of the concerned port, land acquisition costs etc. Such feasibility studies would cover the technical and financial aspects of the terminal development and identify viability and sustainability aspects of the development.

- **Structure bankable PPP Options**

Globally the development of cruise tourism has been achieved purely in the private sector with the Government playing a supportive and strategic role. It would be important for India to follow this precedent by creating the necessary enabling environment and giving the private sector the space it needs to grow.

Government would need to clearly develop bankable project structures that achieves balance risk sharing and addresses the key concerns of the private developer and the investor along with the Government. Based on the viability study undertaken and where necessary, Government would need to explore support private investment into the project

through financial incentives and viability gap funding schemes. All incentives available for infrastructure projects should be made available for cruise terminals.

Long term objectives

- **Make cruise terminals into destinations by themselves**

Cruise terminals represent the entry point of the cruise tourists into various tourism locations. Besides offering the facilities and amenities that would be essentially from the point of view of tourist facilitation, it would be an important strategy to make the cruise terminals themselves into mini tourism destinations much like a tourist village showcasing India's art and handicrafts, ethnic bazaars, a small museum offering a birds eye view of the tourist attractions of the region, food stalls with typical Indian cuisine, children's play area etc. In addition to being an effective promotional medium of the country's brand it would also increase the commercial and business potential of the terminal making it more amenable for private sector participation. Similarly, taking into account that the cruise season (in India) is from September to March each year, the Port authorities can use integrated cruise terminal facilities for other usage such as convention centers, symposiums, exhibitions etc

- **Focus on home porting in the long term**

Significant benefits can be derived from home porting. These benefits include pre-and post-cruise transport and accommodation, increased visitor expenditure, and stores for cruise ships. India should, as a long-term objective, emphasize in developing the Indian cruise ports as 'home ports' rather than only ports of call. Government should continue to address the infrastructure requirement issues that would support home porting.

- **Focus on the 'Drive In' Market equally with the 'Fly in' Market**

Increasing world over the 'drive in' cruise market is gaining in importance unlike the previous trends where cruise tourist had to 'fly in' to take the cruise from the designated ports. This essentially means that in addition to the main cruise ports, we would need to focus closely on the other ports along the Indian coast which may be developed as cruise ports which may become the starting or transit stop for cruise vessels to pick up 'drive in' cruisers.

It has been seen that accessibility and availability form critical aspects to popularize cruises. Accordingly the drive in market would be extremely important for India for the following two reasons:

- To tap the huge potential of the domestic tourists
- To make the cruises accessible to the foreign tourists who may be visiting other Indian destinations

II. CREATE THE PRODUCT

2. Design attractive cruise circuits

Government should design theme based cruise circuits

- Exploiting existing tourism/coastal destinations
- Linking foreign destinations depending on cruise design, theme and logistics
In developing the Indian cruise circuits the four tourists segments would need to be actively targetted and exploited:
- The Foreign Tourists who represent the International Arrivals into India
- The Indian Outbound Tourists who travel out of India.
- The Indian Domestic Leisure Tourists
- The current Cruise Tourists (International and Indian)

The primary survey has thrown up interesting difference in perceptions, preferences and views of the Indian and Foreign tourists. These may be used to develop suitable products and position and market them so that India may address the demands and expectations of each of these segments towards creating cruise itineraries and products.

This report has identified interesting cruise circuits that may be developed. Examples of key circuits that Government should focus on would be :

- Rejuvenation Cruise : Goa- Mangalore-Cochin (Kerala Backwaters)-Male
- Discover India' Cruise : Mumbai-Goa-Cochin-Tuticorin /Cochin Goa- Mumbai-Porbander
- 'Shopper's Bonanza' Cruise : Mumbai-Porbander-Dubai
- Sunshine Cruise to Beaches : Cochin-Goa-Lakshadweep-Male/ Chennai-Colombo Andaman/ Chennai-Colombo Male -Cochin
- Nature Lovers Cruise : Mumbai Goa- Mangalore- Lakshadweep-Mumbai
- Goa-Kerala Party Cruise : Goa (Sea and river Cruises) Cochin (Kerala Backwaters)- Goa
- High seas cruise : Chennai Andaman- Open Seas

Recommendations to reinforce cruise design

The following would constitute the key recommendations towards developing ports infrastructure:

- **Select circuits related to port development should be responsibility of Ministry of Tourism**

The Ministry of Tourism, which best understands the tourism resources and the tourism development strategy, should be made the agency responsible for select tourism circuits which may be aligned to and developed concurrently with the cruise port development. For this purpose, the Ministry should earmark a dedicated fund towards

- Hinterland tourism development
- Tourism related Infrastructure and linkages
- Viability gap funding

This would ensure that the tourism resources are effectively developed, positioned and showcased as part of the cruise circuits.

- **Quick connectivity to other destinations/ attractions/ tourism locations to increase choices**

An important strategy in cruise tourism development would lie in ensuring easy, timely and quick access to heritage locations, monuments, natural features, tourism destinations that lie in proximity to the cruise ports. This would ensure that tourists, especially international tourists, do not miss the opportunity to see the prominent locations that may lie. Enabling cruise tourists who arrive at the Mumbai port the necessary air connectivity to visit the Taj, enabling those arriving at the Mangalore/Cochin Port to see Hampi, and linking Goa port to Somnath/Dwarka are some ideas that could be explored.

- **Create port wise & region wise destinations**

To ensure success the development of Cruise tourism would have to be achieved in close coordination with the development of the larger tourism sector itself. Needless to say these complement each other and the synergistic benefits have to be explored on a continuous basis. It would therefore be imperative to closely link state-wise tourism development master-plans with cruise development plans, marketing and promotion.

It is well known that in Cruise Tourism, it is the destinations rather than the ports, which attract tourists and liners. It would therefore be imperative to create attractive, varied and exotic destinations at every State that can be linked to the cruise ports and highlighted as cruise offerings. While this would be essential to position the ports as effective 'ports of call' it would be equally important for creating a 'drive in' market for the 'home ports' where domestic and foreign tourists visiting the destinations would build the cruise into their itinerary and suitable packages may be offered.

- **Create and position river cruises to complement and strengthen cruise tourism development**

Like Europe, India has destinations in its interiors, many of which are connected by beautiful rivers. Developing River cruises that connect these destinations would

not only create the access that is so important for cruise tourism, but would also enable India to strongly position its tourism destinations and its exotic heritage.

In developing River Cruise, the following points may be noted:

- Linking cruise terminals to river cruises that connect significant destinations would stimulate cruise ships to touch India for the sake of the destination. For example, Sarnath, the key Buddhist pilgrimage destination, lies on river Ganges. Offering this as a river cruise would be a powerful stimulus to the large base of Buddhist tourists who come to India from Asia. Linking this to one of the cruise terminals would ensure that the cruise ships from the Buddhist countries especially Japan, China - come to India.
- The development of river Cruises in India will have to be planned in sync with the larger IWT development plan of the Ministry of Shipping. However, the development will have to be related to the larger tourism potential and proposed cruise terminal development.
- As many of the rivers in India link to interior villages, rural areas, exotic locations, forests, sanctuaries etc. River cruises in India must be linked to ecotourism and rural tourism, both of which form a priority area for tourism development in India and form great attractions for foreign tourists.

III. CREATE THE POSITIONING : INDIA ASA 'MUST SEE' DESTINATION

Develop Brand Cruise India as an umbrella brand

India offers relatively a small market compared to the global industry. Accordingly, there would be considerable merit in positioning India as a single India-branded cruise experience that fully integrates and complements the relative strengths and distinctive value propositions of each of the states. This will enable the country to sell a strong integrated brand while at the same time by selling India as the principal destinations all the states will benefit as cruise lines seek diversity in itineraries. This would also help the Ports to work as complementary to each rather than as competitors.

- The key 'brand message' underpinning the Indian brand will be 'diversity in harmony', 'more for less', 'value for money' 'must see' destination, underlining
- Value for money, for both cruise lines and passengers, given the \$ and Rupee exchange rates
- Safe and friendly
- Exotic, offering a blend of heritage, natural beauty, art, culture, cuisine & adventure
- Build destination brands into the core brand

Position theme based circuits targeting niche segments

World over, traditionally, cruises have been thought of as meant only 'for the newly weds or nearly dead' with cruises being filled principally with retired or honeymooning travellers. This profile is fast changing and India would need to take advantage of this trend to position Indian cruises for the 'youth' and for 'families' both of which constitute an important component of Indian tourism in addition to the traditional segments.

In addition, India would have to design and position the cruise circuits specifically at the identified segments, for eg

- For domestic/outbound tourists highlight foreign/exotic destinations
- For foreign tourists highlight world heritage, history, health

Recommendations to reinforce positioning

The following would constitute the key recommendations towards reinforcing the marketing and positioning strategy:

- **Develop an effective media campaign**

The positioning and promotion efforts would have to be supported through a proactive media plan which would cover both domestic as well as international markets. The Media Plan will cover audio-visual presentations and films, out-door advertising, organizing events & exhibitions, preparing attractive brochures, leaflets, posters, hand-outs, TV inserts etc. The department of tourism would need to identify the media requirements and provide for a suitable yearly budget for this activity.

While it would be desirable to adopt multi-pronged marketing strategies, it would be equally vital to draw up focused marketing strategies to address each of the segments targeted taking into account the unique characteristics of the segment targeted.

It would also be useful to consider appointing a specialized marketing and brand promotion agency to draw up the marketing strategies, the media plan, the brand promotion approach etc. in a phased manner. This would be important because this involves extensive planning and careful strategizing and professional agencies would more effectively market the State in the long run. This agency would also take care of advertising and promotion, events and festivals, all audio-visual and publicity material, advising the state in participating in useful international festivals and forums etc.

- **Participate and create visibility in International forums**

Effective promotion would demand representation in international forums including road shows, trade fairs, exhibitions, seminars etc and entering into tie-ups with proper bodies. Participation in International Sea trade Shipping

conferences, conventions, trade shows, promotional fairs would also be relevant. The objective would be to create visibility and reinforce the brand name overseas.

- **Establish dialogue with all the four key players**

Government should immediately start a dialogue with the 'big four' players - Carnival, Royal Caribbean, P&O Princess & Star Cruises Group - who control the cruise tourism market. Creating a brand with these operators would go a long way in achieving the marketing objectives. The inputs received from them in terms of terminal, product and circuit development would also be relevant to ensure that the development happens on the right lines.

- **Explore synergies with Dubai Cruise Tourism**

Dubai is a relatively new entrant into the Cruise market, very close to the Indian Sub continent. The cruise ports identified for development in India in the first phase Mumbai, Cochin and Goa are all on the west coast of the country, close to Dubai. India should explore the synergies between the two countries wherein both countries can arrive at cooperative measures to jointly promote cruise tourism. The Dubai Department of Tourism and Commerce Marketing (DTCM) has offices in India. Both countries can mutually cooperate to explore & exploit its proximity so that all cruise ships that touch the west coast of India can visit Dubai and vice versa.

Long term objective

- **Develop a greater 'Indo-Asian' alliance to attract cruise shipping to the region**

To enhance the marketability of India, a sustained objective should be to create a larger 'Indo-Asian' cruise product that combines the Indian cruise experience with the experiences of strategically valuable neighbouring countries. To this end, feasibility of establishing formal alliances should be explored. The Asian ports and regions already form part of the South-East Asia and Asia Pacific itinerary. There is merit in exploring the possibility of co-branding these segments of the journey as an overall Asian experience, gaining promotion leverage from each port and developing a consistent quality of activities and services offered. The benefits of regional partnerships would include

- Access to different tourism product to incorporate into regional packages
- Access to other expertise and processes in Port management and services
- Development of consistent management policies and quality assurance processes across key regional ports to control the cruise line experience enroute.

Such an experience will have considerable positive branding implications.

IV CREATE THE EXPERIENCE

Create 'cruise friendly' ports

Ports are the entry points, promotional platform and first experience of India; accordingly positive, memorable 'port experience' is crucial for ensuring successful cruise tourism development in the country. It is well known that hassle free 'seamless' travel would constitute an immense positioning strength for cruise tourism and go a long way with cruise operators.

Recommendations to reinforce experience

The following would constitute the key recommendations towards creating a positive and friendly tourism experience at the ports:

- **Simplify procedures to reduce harassment at Ports**

The port authorities should work towards simplifying the procedures covering immigrations, customs, procedures, travel, linkages so as to make the port visit a pleasurable experience remembering that 'swagat' and 'suvidha' form important policy aspects of tourism development in the country. The primary survey undertaken clearly indicates that fast immigration & transit through the port is the topmost priority for both foreign and domestic tourists

The regular port procedures would need to be reviewed in the context of cruise tourist as these would be in the nature of harassment for a holidaying passenger. Some examples of such simplification would be:

- Streamline clearance of tourist and baggage at Customs, using electronic machines wherever possible.
- Immigration officers can board at previous port of call and finish formalities en route
- Visa requirements may be done away with eg Colombo, Singapore
- Expedite issue of passes
- Simplify health checks and clearances

Similarly, effective bilateral relationship with other cruise destinations (especially in the region) would be important to make travel visa/clearances quick and efficient. For example, Singapore has understanding with Thailand whereby Thailand automatically endorses the Singapore visa when the vessel arrives. Such arrangements need to be actively considered and pursued.

- **Develop a 'tourism' approach ('6S') at ports**

The Ministry of Tourism has highlighted the 6 critical aspects of tourism development as part of its national tourism policy. These dimensions - Swagat, Sochna, Suvidha, Suraksha, Sahyog, Sanrachna would be extremely meaningful at the Ports. Ports authorities would need to address and underline

these six aspects while undertaking cruise terminal development and maintenance.

V. BUILD THE CAPACITY

Focus on 'Software' & 'hospitality' face of cruise tourism

While the 'hardware' of cruise tourism in the form of port infrastructure and cruise lines is important, the 'software' in the form of human resources is equally vital. It would be important to focus on the creation of human resources as the 'hospitality face' of the cruise sector through the creation of proper training programmes. Where formal long term training courses may be difficult to implement, it would be desirable to structure short certification programmes/ workshops/ seminars (1-2 weeks) that would impart focused training to certain groups like police, taxi drivers, security personnel, immigration and customs officials etc.

Capacity building will have to be addressed for different groups taking the training need for each into consideration. The personnel to be trained would have to be identified such as:

- Ground Staff including baggage handling staff and officials in charge of various procedures
- Other Terminal staff including shopkeepers, staff at information kiosks, tour guides, travel agents etc
- Other interface personnel especially the police and taxi drivers

The key training areas will relate to:

- Awareness of cruise tourism & tourist
- Communication & hospitality
- Tourist safety & security
- Services Management
- Environmental aspects

Recommendations to reinforce capacity building

The following would constitute the key recommendations towards building the 'software' of cruise development:

- **Training responsibility may be given to the tourism department**
respect of meeting the training needs of cruise tourism, the tourism department would play a crucial role. Since HR requirement for the tourism sector is equally important and forms a focus with the central and state governments, the training requirements for cruise tourism should be built into the tourism training strategy and structure. The Tourism department, therefore, may be given the responsibility to provide the necessary training for cruise tourism and port personnel.

- **Structure focused programmes aimed at awareness building and skill development**

The training programmes would have to be carefully structured and focused on all aspects such as:

- Training for immigration and customs officials
- Communication programmes for all
- General awareness building and sensitization campaigns
- Workshops to police, taxi drivers, security personnel

- **Contact Foreign Universities conducting training for approach & structure**

Certain select foreign universities like Southern New Hampshire University and the Bremerhaven University, are conducting such training programmes. These may be approached for getting the necessary structure, approach and methodology.

- **Consider 'accreditation' as a tool to improve quality and surveillance**

Certifications to validate quality and service standards will be an effective tool to improve quality standards while increasing comfort levels with customers. Kerala has followed this strategy in certifying its ayurvedic resorts, house boats, restaurants and eating places etc. This strategy would importantly demonstrate the commitment of the government to quality as well as to the needs of the cruise passengers.

VI. CREATE THE POLICY AND INSTITUTIONS TO SUPPORT DEVELOPMENT

Evolve a 'national policy' for cruise shipping.

The carefully drafted policy on cruise tourism will have to address all crucial aspects as highlighted in this report, specially focusing on all the 6 S of tourism development. The Cruise Policy would, inter-alia, need to specially address the following:

- Clearly demarcate roles and responsibilities of each agency/department in different aspects of cruise tourism development, since cruise tourism spans several agencies and departments.
- Address issues that cruise lines and operators would consider important. Global market trends indicate that Cruise liners plan their itinerary, make their bookings and chalk out their voyage 3 to 5 years in advance. In other words most large cruise lines today are already booked for 2008. In this scenario, Cruise lines hesitate to include destinations in their itinerary that have uncertainty in terms of policy or other material issues. Often they back out of a port of call because of uncertainty. For example India's policy decision regarding Cabotage is valid only till 2007 and market feedback indicates that several cruise lines, which are uncertain about how the government will move after expiry of this policy, have not included India in their itinerary for the 2008 voyage.

- Address tax related issues. In addition to tourism related taxes, a cruise vessel & its passengers are also subject to several charges and fees. Although port charges are a small component of the spending of the cruise industry, they are amongst the most visible inhibitors. It is important that attractive tariff rates are provisioned to attract cruise vessels and tourists. Simplification of payment procedures for dues and charges would create a favourable environment with the cruise tourists. This can be explored through Combined tariffs (single tariff for multiple port calls in a single itinerary), differential tariffs (discounted tariffs for home cruise, frequent visits by vessels of a cruise line & high tourist capacity vessels or vessels disembarking / embarking a certain threshold number of cruise tourists), One stop clearance (single clearance at the first Indian port on a ship's itinerary for all other Indian ports). Similarly, the dollar charges as compared to Indian charges for certain monuments are very high. This is often a cause of concern to foreign tourists on account of discrimination, with several international tourists citing it as a turn-off in a survey.

Establish a 'national agency' to spearhead the Initiative

Government should establish a Cruise Tourism Council/Board to reinforce Government's commitment and coordinate to effectively implement the Cruise Tourism Policy. Today cruise tourism is nobody's baby, because while it is certainly not the primary business of Ports the Tourism department also cannot initiate independent action because of the interface with other departmental authorities.

It is therefore imperative to create a separate agency which

- has representatives from major ports, department of shipping, Department of Tourism, industry stakeholders to represent all interests
- is dedicated to the promotion of cruise tourism
- equitably represent interests & concerns of all the agencies
- discharges multi-disciplinary and coordinative functions

AREAS OF RESPONSIBILITY

Agency/department wise responsibility for implementing the recommendations are::

Ministry of Shipping

The MoS, being the apex body, would need to look at the macro level policy/approvals/incentives issues. Its role would essentially relate to the following:

- Develop proactive policies to simplify procedures at cruise ports
- Develop suitable incentive structures for developers and operators
- Assist in giving ports the necessary support in identification and development of cruise terminals
- Spearhead the initiatives to develop river cruises as part of the inland water transport system

Port Authorities

Port Authorities would be directly responsible for all aspects related to the development and operations of the Cruise Terminals. Their role would essentially relate to the following:

- Master planning, pre-feasibility studies
- Land acquisition
- Development of off-shore facilities dredging and berth development
- Port level marketing efforts
- Developing suitable/positive measures to initiate bankable Private Sector Participation in the development of Cruise terminals
- Initiate and take through the selection process for PSP in cruise terminals

Ministry of Tourism

The responsibility of the Ministry of Tourism would arise from their understanding of the tourism demands of cruise terminal and responsibility towards synergistic tourism development to support cruise terminal development. It would essentially cover the following:

- Inputs towards preparation of cruise terminal development plans
- Institute a dedicated fund towards
- Hinterland tourism development
- Tourism related Infrastructure and linkages
- Viability gap funding support, where needed
Coordination for regional circuit development involving more than one State
- Development of Tourism related urban infrastructure
- Sector level marketing, positioning, publicity especially marketing the cruise terminal as a cruise destinations
- Coordination for any interstate circuit development
- Ensure training for the secondary stakeholders by the State Governments
- Develop accreditation/certifications for quality assurance

State Departments of Tourism

Since cruise tourism would cover various states and regions, the Department of tourism at the State level would have responsibility for the following:

- Hinterland tourism development related to the State which services the cruise terminal Circuit development within the concerned state
- Coordination with neighbouring states for regional/hinterland tourism circuits
- Human resource training capacity building
- State level marketing efforts

Private Sector

The role of the Private Agencies would arise from their close understanding of the cruise tourism sector and their ability to successfully fund and manage the cruise terminal while taking the necessary investment risk. Private developers would do the following:

- Cruise Terminal Development
- Cruise ship/Lines operations
- Operation and management of all facilities
- All tourism related infrastructure in the hinterland
- Tourism related services restaurants, hotels, other accommodation, travel and trade, communication, publicity & marketing

Ministry of Environment & Forests

The Ministry of Environment and Forests would play an important role to positively enable the development of Cruise terminals. This is because cruise terminal development in many areas (such as Andamans & Nicobar islands, Lakshadweep Islands, other beaches & coastal areas) would demand clearances on account of various environmental regulations pertaining to the 'coastal regulation zones', the reserved forests, national parks and sanctuaries etc. The role of the Ministry would be to:

- Develop an approach/policy which is sensitive to the need to develop cruise terminals in environmentally sensitive areas
- Drawing up plans for development of cruise tourism, ecotourism, rural tourism in environmentally sensitive areas
- Draw up framework/guidelines for environmental compliance and also a system of certification /grading depending on certain specifications/standards achieved
- Provide the approvals etc subject to meeting certain basic environmental standards & stipulations
- Drawing up guidelines for the reference of other agencies which could be used in the implementation of all projects related to cruise tourism
- Drawing up a system of quality certifications providing the minimum compliances for basic certification and right to operate and further higher levels of compliances to obtain quality certifications

The National Agency identified above should be the focal point for representing the interests of these agencies as well as coordinating the responsibilities identified.

Action plan

The immediate step to be taken with regard to the measures suggested in this Section area as follows:

- Evolve a comprehensive cruise policy
- Develop the Institutions needed to support initiatives
- Undertake pilot feasibility studies for identified cruise terminal development
- Develop Phase 1 projects along with cruise circuits
- Initiate dialogue with four key players involve the players in policy and planning decisions

Detailed Study report at Ministry of Tourism web site www.tourism.nic.in

9.2 KERALA'S APPROACH TO TOURISM DEVELOPMENT - A CASE STUDY

The immense potential of the tourism sector to act as a catharsis of economic and social development has been acknowledged in national and international forums. Almost all the States in India have placed tourism on a priority platform, making efforts to exploit the tourism resources and potential offered by the State.

Kerala has been significantly successful in its tourism efforts, in creating a key tourism platform for the State and positioning itself competitively in the international tourist market. In 2002, the State was able to augment its tourism earnings to Rs. 705.6 crore as against Rs. 535 crore in 2001, representing an increase of 31.8 per cent. In 2003, it recorded India's highest growth in international arrivals at 26.8 per cent. Acclaimed as India's only 'tourism superbrand', Kerala has been able to develop strengths in certain core areas of product development and infrastructure creation.

With almost all States in India struggling to establish a brand and seek a positioning in the domestic and international arena, it becomes important to make a case study of Kerala's success story and find the reasons that may lie behind this. The Department of Tourism, Ministry of Tourism and Culture had commissioned CRISIL Infrastructure Advisory to 'identify various factors that influence the tourist to visit Kerala as a preferred destination' so that important lessons may be learnt and replicated in other States.

The Terms of Reference of the study were:

1. To conduct an in-depth study to identify the various factors influencing the tourist to visit Kerala as a preferred destination
2. To develop, as an outcome of the study, a role model that can be replicated in other states also.
3. To undertake the study through a combination of field survey and analysis of the available data from secondary sources
4. To identify the factors/strategies/action plans etc. of the government specifically in respect of the following areas:
 - Product/destination development
 - Infrastructure development
 - Marketing strategies in India and abroad
 - Public private partnership
 - Impact on local economy
 - Incentives/Concessions provided by the state government
 - State government initiatives to contain the negative impact of tourism
 - Any other factor contributing to the overall development of tourism in the state

This report has analysed all elements of the Kerala tourism sector, with a view to understanding the approach and strategy that has been adopted and the planning and policy that has preceded the significant development of tourism in the State. An overall view of the report and the main recommendations are presented in the following paras.

KERALA IS A ROLE MODEL IN TOURISM DEVELOPMENT IN INDIA

'God's Own Country' has managed to capture the attention of the international tourism market in no uncertain manner. Kerala's tourism brand is listed among the top 100 brands of India and has been accorded the highly coveted 'Super Brand' status. Kerala is cited as one of the 50 destinations of a lifetime by National Geographic Traveller, and is also a 'partner state' to the World Tourism and Travel Council.

While initiatives in tourism date back to the late 1980s, it was only since 1995 that focussed efforts in tourism development were launched by the State Government. A comprehensive tourism policy was announced in 1995, this was followed by several tourism planning and developmental initiatives. Therefore, Kerala's performance from this point of take off has been analysed.

From 1995 onwards the state has taken significant strides and the results today highlight its impact. The following section highlights Kerala's results ('Effects of Change') in the period between 1994 and 2002:

TABLE 1: KERALA'S RESULTS 'EFFECTS OF CHANGE'

- A 357 per cent increase in its domestic tourist arrivals, from 1.284 million in 1994 to 5.871 in 2003 that earned for the state the 'Award for Excellence in Tourism' from the Government of India for four years between 1999 and 2003.
- A 25.7 per cent increase in its foreign tourist arrivals, and a rise in its share of Indian's international visitors, from 5.5 per cent in 1994 to 10.98 per cent in 2003
- A 747 per cent increase in its tourism receipts, from Rs.116 crore in 1994 (1.63 per cent of India's receipts) to Rs.983 crore in 2003 (4.97 per cent of India's receipts)
- An increase in the average duration of stay of an international traveller to Kerala from a mere 1.5 days to 14.1 days

More importantly, the State has created tourism products purely out of its natural and traditional strengths that successfully meet international quality expectations and compete with international destinations in marketing. Today, Kerala's 'backwaters' and 'ayurveda' are globally identified and uniquely positioned.

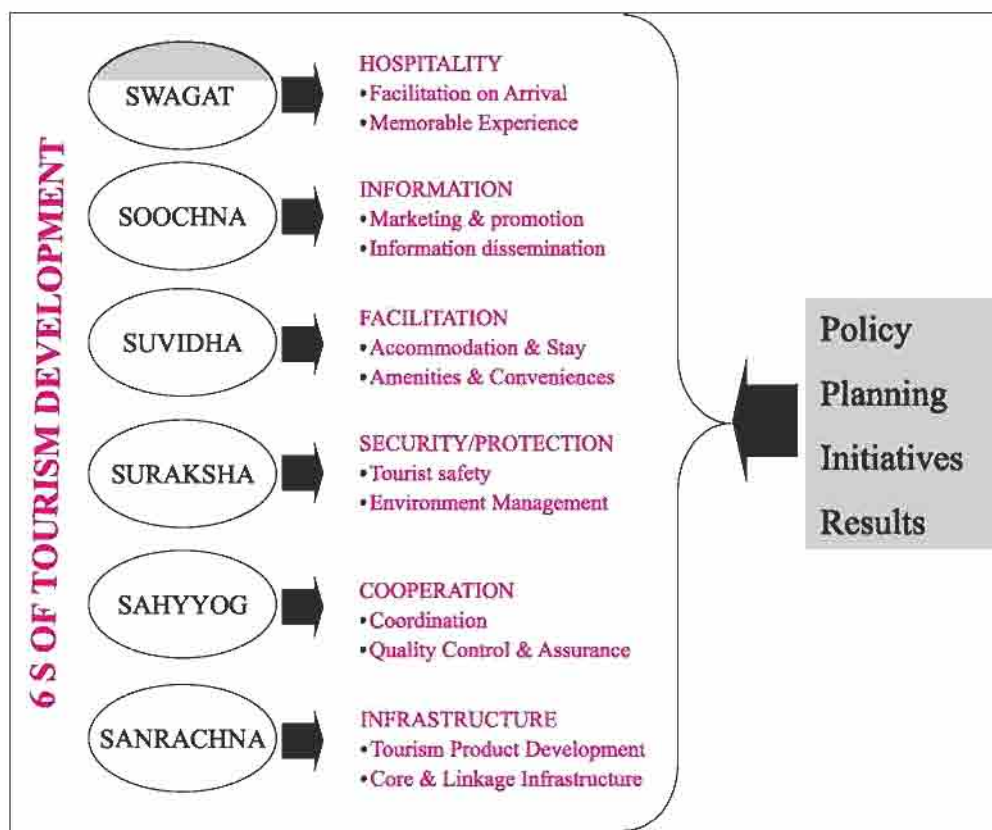
Kerala as a destination is spoken of in international travel magazines like the National Geographic, Conde' Nast Traveller, Geo Saison and Newsweek. Besides, Kerala has been acclaimed as 'one of the 10 Paradises found' by the National Geographic Traveller.

ANALYTICAL FRAMEWORK FOR ASSESSING KERALA'S TOURISM INITIATIVES

To understand the secret of Kerala's success, the State's policy, planning and developmental initiatives have been examined, and these were then mapped to the results on the ground. ('The Change Dynamics').

These developmental initiatives have been analysed, and their impact, through the 'Six S' framework of India's National Tourism Policy that comprehensively captures all various dimensions of tourism initiatives, as has been shown in table below: Error! Reference source not found..

The 'Six S' framework for analysis



The entire analysis was undertaken through a combination of desk research and field surveys. Various stakeholders were interviewed during the course of the study and a detailed questionnaire survey was undertaken to gauge both domestic and international tourist perceptions.

What Kerala has done?

The analysis reveals that the State has taken conscious strategic measures in all the six areas highlighted as important for tourism development. Kerala's success, on the ground, is reflected in the feedback and rating received from domestic and foreign tourists during the primary survey on key hospitality aspects.

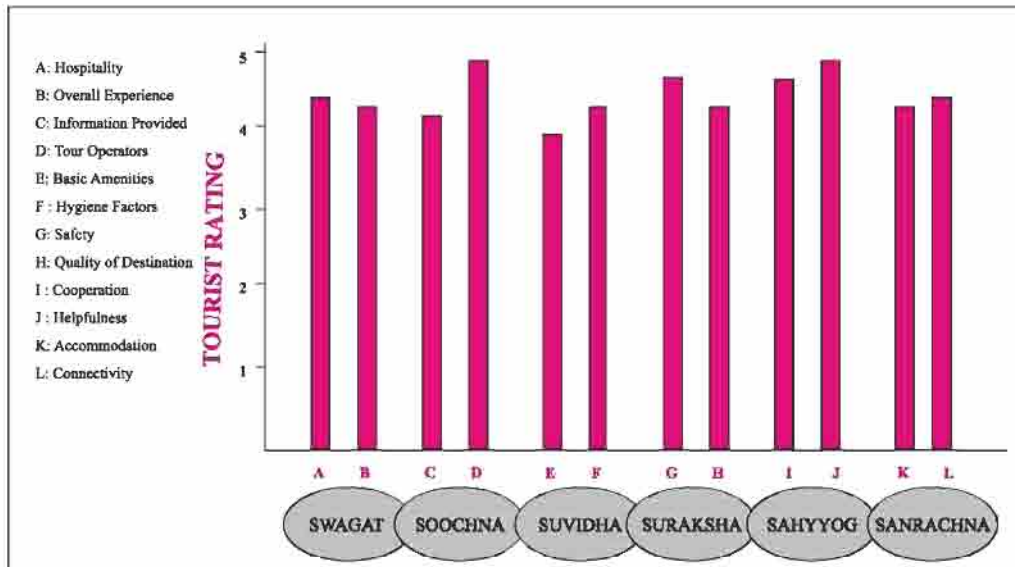
Visiting Kerala is a truly memorable experience. This was emphatically endorsed by all the tourists that were surveyed.

Visiting Kerala is a memorable experience

- All domestic and international tourists surveyed said that they wanted to revisit Kerala.
- All tourists want to recommend Kerala to their friends and relatives.

Kerala has also received high ratings from both domestic and international tourists on all of the six parameters of evaluation. The following provides a snapshot of the results.

Tourist Rating of Kerala on the 6 S



The rating was on a 5-point scale, with 1 denoting 'not satisfactory' and 5 denoting 'excellent'

Key learnings from Kerala

The analysis revealed that Kerala has built on its strengths; it has forged partnerships and engineered positive approaches necessary to achieve a quantum growth in the tourism sector. Critical among these has been the State's success in

bringing in private sector participation, in bringing together the various stakeholders on a developmental platform, in encouraging committed professionals and bureaucrats who have been with the State for a decade or more and in achieving a clear positioning for Kerala on all international platforms.

Kerala highlights significant learnings for any State, interested in tourism development. These (**'The Change Imperatives'**) are summarized below:

- Build tourism on core and naturally available resources
- Create an distinct brand image for tourism
- Compete internationally not locally
- Learn from mistakes made elsewhere to avoid traps of development
- Professional administration and strong political support to ensure stability of the tourism development programme
- Social development and citizen responsiveness to tourists are essential components of tourism development
- Let the professionals lead
- Give the private sector the space it requires to grow
- Package the product to align with international trends
- Protect the product to ensure sustainable development
- Continue to work on the disadvantages and weakness
- Take tourism seriously 'making tourism everybody's business'

From the above lessons, it is clear that Kerala has successfully focused on five critically important and interrelated areas for strategic intervention, emphasizing on the first three, to begin with, and then spreading the focus to the other two areas:

- **Policy:** Supporting a transparent and inclusive policy process, promoting fair and open competition, strengthening institutional capacity to implement and enforce policies, drawing international support to augment expertise
- **Product Development:** Leveraging core strengths, creating new products, building USP, focusing on sustainable development to offer products of international quality, creating enabling investment environment, stimulating demand, promoting partnerships to ensure the flow of funds into the tourism sector
- **Marketing:** Building a brand, emphasising quality assurances, providing demand-driven information, competing at a global level, collaborating on international and regional platforms to create a highly visible platform for the state.

- **Infrastructure:** Focusing on the core and linkage infrastructure and investing in strategically focused capacity to support development priorities
- **Tourism Services:** Building a critical mass of tourism workers, increasing technical skills, strengthening community entrepreneurial skills, augmenting managerial capacity to build a service sector sensitive to tourists and tourism

While gains may be achieved through interventions in any one of the areas, the real benefits to the state have stemmed from a holistic approach, thus offering a strategic framework that may be used as a tool by any state to prioritise tourism development initiatives and maximize their long-term impact.

Where strategic interventions covering these areas are properly conceived and implemented, they have the potential, through their interaction, to create a virtuous development circle, a 'development dynamic'.

Detailed Study Report at Ministry of Tourism web site www.tourism.nic.in

9.3 MANPOWER REQUIREMENT IN HOTEL INDUSTRY AND TOUR/TRAVEL SECTOR

With the growth in tourism sector in the country, need for assessing the future requirements of trained manpower was felt. In this context the Ministry of Tourism, Government of India, commissioned a study through M/s Market Pulse to assess the manpower requirements in the hotel and restaurant sector as well as the tour and travel operation business with the following terms of references:

1. To analyze the job opportunities in the hotel sector by assessing :
 - Current manpower requirement, and the requirement by 2010 & 2020 of different categories of personnel in star category, heritage hotels, un-approved hotels, restaurants and cafeterias (both region-wise and state-wise);
 - The manpower available in the hotel industry and a comparison of the same with the total workforce.
2. To make an estimate of trained manpower by assessing the number of personnel (category-wise) trained presently, and in 2010 & 2020. The institutes to be considered are as follows:
 - National Council for Hotel Management and Catering Technology (NCHMCT)
 - Private sector and other agencies related to travel and tourism
3. To analyze the placement scenario (category-wise) of the students and quantify the number of students passing out from various institutes, offering courses related to travel and tourism. The institutes to be considered would be IHMs/ FCIs under NCHMCT as well as private institutions and other agencies related to travel and tourism.
4. To assess the current manpower requirement as well as for 2010 & 2020, in the tour operation and travel sector.

Methodology

The study is based on an extensive primary field survey, analysis of secondary data as well as physical visit to the cities. The primary field survey was carried out in 27 important tourist destinations, which were selected from different destination categories on the basis of their tourist traffic. Interviews of senior level Managers in the Human Resource Departments of large organizations, as well as the owners-Managers of smaller organizations were conducted, as also the views of Secretaries and Director level officials of State tourism departments. Representatives of hotel associations were also interviewed to get the views of industry operators.

The study covered the following segments of the tourism sector:

Hotels	All star category & heritage hotels Others registered with municipal bodies or hotel associations. Various small hotels/ guest houses/ inns scattered in residential areas or located in pockets near the rail way station, inter - state bus depots, etc.
Restaurants	All conventional restaurants (AC /non AC) registered with municipal bodies or listed in telephone/trade directories Fast Food chains <i>Dhabas/hawkers/ juice corners</i> Cafeterias, etc.
Travel & Tour Operators	Organized sector players registered with TAAI Other small and medium sized travel agencies Ticketing agents
Hotel Management and Travel & Tour Institutes	Those registered with NCHMCT Private sector institutes

The States of Jammu & Kashmir and Bihar were not covered directly as also some Union Territories, such as, Andaman & Nicobar, Pondicherry and Lakshwadeep. The States covered in the study accounted for 88% and 94% of domestic and foreign tourist visits, respectively.

Summary of Findings

Hotels in India

- There are an estimated 1.2 million hotel rooms in the country. However, the star category hotels account for a mere 7% (approximately 80000 rooms).
- Going by the present growth, it is estimated that there will be a total of 2.9 million and 6.6 million hotel rooms in 2010 and 2020 respectively.
- The larger four & five star hotels (along with the heritage hotels) employ on an average 162 people per 100 rooms, compared to 122 in the One, Two & Three Star Hotels and 58 in the unorganized sector.

- There are almost 750,000 people working in hotels across India. In addition, there are more than 1 lakh employees working in motels on State & national highways.
- Employment is forecast to increase to 3.5 million by the year 2020.
- A bulk of the employees (approximately 60%) are working in F&B service, Kitchen and housekeeping.
- Almost 80% of the employees in key hotel functions, such as F&B, front office and housekeeping, are young; they are less than 40 years old.
- Most employees in the management/supervisory cadres in the front office, F&B service, kitchen and housekeeping function of the larger four & five star hotels have a formal hotel management qualification.
- Almost half the managers and supervisors of the one to three star hotels have either a hotel management degree/diploma or a Food Crafts Institute Certificate.
- Hotels in the unorganized sector employ largely untrained manpower.

Restaurants in India

There are an estimated 140,000 restaurants in urban India.

- Delhi and Mumbai account for nearly 15% of these restaurants.
- Conventional restaurants account for the largest population (30%), followed by sweet shops (16%), fast food outlets (16%) and dhabas (13%).
- While the number of conventional restaurants range between 10-20 numbers per lakh of population, the total number of eating places could be as high as 86 per lakh of population (as in the North).
- The total number of restaurants could touch 200,000 in the year 2010, and 240,000 in the year 2020.
- There are almost 1.85 million people working in restaurants across India. Employment is forecast to increase to 2.73 million by the year 2020.
- In addition, there are more than 1.3 million people employed in small restaurants and dhabas on the State and national highways.

- Almost 70% of the employees in key functions of F& B service and kitchen are less than 30 years old.
- Almost 20% of those employed in F & B of conventional restaurants, cafes and fast food outlets are diploma holders either from private hotel management institutions or Food Craft Institutes. Dhabas, largely, employ untrained manpower.

Travel Trade Business in India

- There are approximately 6000 travel trade companies/ firms in the country.
- The population of these agencies could be growing at 7.5 - 10% annually.
- On an average, each of these travel trade agencies employ 14 - 15 people.
- This sector employs almost 83,500 people. Of them, a significant proportion are in functions such as ticketing, tour operations and accounts/ administration. Forecast is that the employment in this sector will touch 242,000 by year 2020.
- Almost 44% of the employees in ticketing have a formal IATA/ UTA certificate or a diploma in travel & tour management; 17% of those in administration also have a formal education in travel & tour management. Overall, 17.5% of the employees have formal training in tour and travel management.

Annual Demand for Trained Manpower: A Forecast

- The annual demand for trained manpower in hotels and restaurants is likely to touch 29,000 by the year 2010; this is likely to increase to approximately 39,000 by the year 2020.
- The demand for trained manpower in hotels and restaurants is likely to be boosted by aggressive expansion of fast food restaurants/ cafe, an increase in 1 - 3 star budget hotels, golden quadrilateral of national highways as well as the preference for youth in this sector.
- The annual demand for trained manpower in the travel and tour sector is likely to be 1275 and 2075 in 2010 and 2020, respectively.

Training Institutes in Hotel Management/ Food Craft

- There are approximately 175 training institutes engaged in hotel management and food craft; 50 of them are government sponsored/ owned. Of the 125 private institutes, only 47 are registered with AICTE.
- A total of 18000 students are graduating with a degree/ diploma in hotel management or food craft. Of them, only 20% are obtaining training in government sponsored institutes.
- Only 3800 students (21%) are completing diploma/ certificate courses; a majority of them are completing 3-year degree courses.
- These institutes claim 100% placement for the graduating class. However, 35-40% of the graduates are joining other emerging sectors such as call centers because of the following reasons:
 - Better salaries in alternative careers
 - Poor perceived image of work in hotels
 - Reluctance to take up job in the service function of hotels & restaurants
 - In this scenario, there is likely to be a shortage of trained manpower in this sector.

Training Institutes in Travel & Tourism Management

- There are 172 training institutes engaged in travel and tour management education; only 11 of them are government sponsored institutes, 78 are affiliated to universities while the balance are privately owned ones.
- Approximately, 17,500 students are completing IATA/ UFTA certified diploma courses, graduate and post-graduate degree courses.

Strategic Recommendations

- The present and new hotel management institutes have to train a substantially larger number of students to cater to the increasing demand in hotels and restaurants.

- The student intake for diploma and certificate courses needs to be increased substantially; this could be done by altering the mix of students in favour of the short-term courses.
- Since trained manpower is scarce in the smaller hotels, a training module in the form of audio and video CDs can be explored.
- The existing training infrastructure for the travel and tour sector appears to be adequate.
- A joint sector campaign has to be undertaken to generate pride in a hotel management career. This will help attract and retain trained manpower in this sector.

KEY RESEARCH FINDINGS

HOTELS IN INDIA: Present Infrastructure

There are an estimated 1.2 million hotel rooms in the country. However, the star category hotels account for a mere 7% (approximately 80000 rooms); most of the rooms are contributed by budget hotels, guesthouses and inns, that cater primarily to domestic tourism.

The metropolitan cities of Delhi, Mumbai, Chennai, Hyderabad and Kolkata, along with Goa account for 62% of the rooms in the five & four star category. The other smaller hotels are more geographically dispersed; this results from a strong correlation between hotels in the unorganized sector and domestic tourism statistics. Places of pilgrimage such as Tirupati and Haridwar have significantly lower availability of rooms 28 & 150 rooms per lakh of tourists, respectively.

The forecast is that there will be a total of 2.5 million and 5.8 million hotel rooms in 2010 and 2020 respectively. This assumes that the infrastructure growth will keep pace with the anticipated growth in tourism. The other assumption is that the mix of hotels will remain the same; however, this might change in favour of the organized sector, if government initiatives take shape. Geographical spread might also change in favour of North-eastern states, J&K, West Bengal, Andhra Pradesh, Madhya Pradesh & Uttar Pradesh.

HOTELS IN INDIA: Employment Pattern & Forecast

Employment intensity increases with the size of hotel. The larger Four & Five star hotels (along with the heritage hotels) employ on an average 174 people per 100 rooms, compared to 122 in the One, Two & Three Star Hotels and 58 in the unorganized sector.

	Employment Intensity (Employees per 100 rooms)	Total Employment 2002	Total Employment 2010	Total Employment 2020
5/4 star Hotels	174	57,000	83,000	1,10,400
1-3 star Hotels	122	52,500	63,000	83,000
Smaller hotels	58	638,000	14,05,000	32,61,500
Total	NA	7,47,500	15,51,000	34,54,900

In addition, there are more than one lakh employees working in motels on state and national highways.

A bulk of the employees approximately 60% are working in F&B service, Kitchen and housekeeping. Front offices of the larger hotels account for nearly 7% of the employees.

Hotel Employee Profile

Five/Four Star Hotels: Most employees in the management/supervisory cadres in the front office, F&B service and housekeeping have hotel management backgrounds. Almost 90% of the chefs are having a hotel management degree/diploma or a certificate from a Food Crafts Institute.

Three, Two & One Star Hotels: Almost half the managers and supervisors have either a hotel management degree/diploma or a Food Crafts Institute Certificate. A majority of those at junior levels are just graduates or even SSC pass.

Unorganized Sector: Only a few of the managers have a hotel management degree/diploma. Most of the employees consist of untrained manpower.

Almost 80% of the employees in key hotel functions such as F&B, front office and housekeeping are young; they are less than 40 years old. In the smaller hotels, more than 50% are less than 30 years old.

RESTAURANTS IN INDIA: Infrastructure

The burgeoning middle class and evolving lifestyle is driving the demand for quality restaurants both conventional ones as well as fast food outlets and cafes. It is estimated that there are at least 140,000 restaurants in urban India. Delhi and Mumbai account for nearly 15% of the restaurants. Conventional restaurants account for the largest population (30%), followed by sweet shops (16%), fast food outlets (16%) and dhabas (13%). Northern region already has over 10000 fast food outlets serving Chinese, Western and Indian food.

While the number of conventional restaurants ranges between 10-20 numbers per lakh of population, the total number of eating places could be as high as 80 per lakh of population (as in the North).

RESTAURANTS IN INDIA: Employment Pattern & Forecast

The total number of restaurants could touch 200,000 in year 2010 and 240,000 in year 2020. The mix is likely to remain largely the same; however, fast food outlets and cafes in the organized sector are likely to grow much faster than the others if one goes by the stated expansion plan of large chains.

	Employment Intensity (Employees per 100 chairs)	Total Employment 2002	Total Employment 2010	Total Employment 2020
Conventional Restaurants	26	926000	1226000	1436000
Cafes/Coffee/ Tea Vendors	31	270000	406700	504500
Fast food Outlets	32	284000	401600	487800
Dhabas/Bhojanalays	26	179000	253900	306300
Total	NA	1659000	2288200	2734600

In addition, there are more than 1.3 million people employed in small restaurants and dhabas on the State and national highways. By 2020, even a 10% share for the organized sector will generate nearly 130,000 jobs for trained manpower.

More than half the employees are in key functions of F& B service and kitchen and are less than 30 years old.

Almost 60% of these employed in kitchens of conventional restaurants, cafes and fast food outlets are diploma holders either from private hotel management institutions or Food Craft Institutes. Only 20% of people in F&B Service are hotel management degree/diploma holders. Restaurants, employ largely untrained manpower.

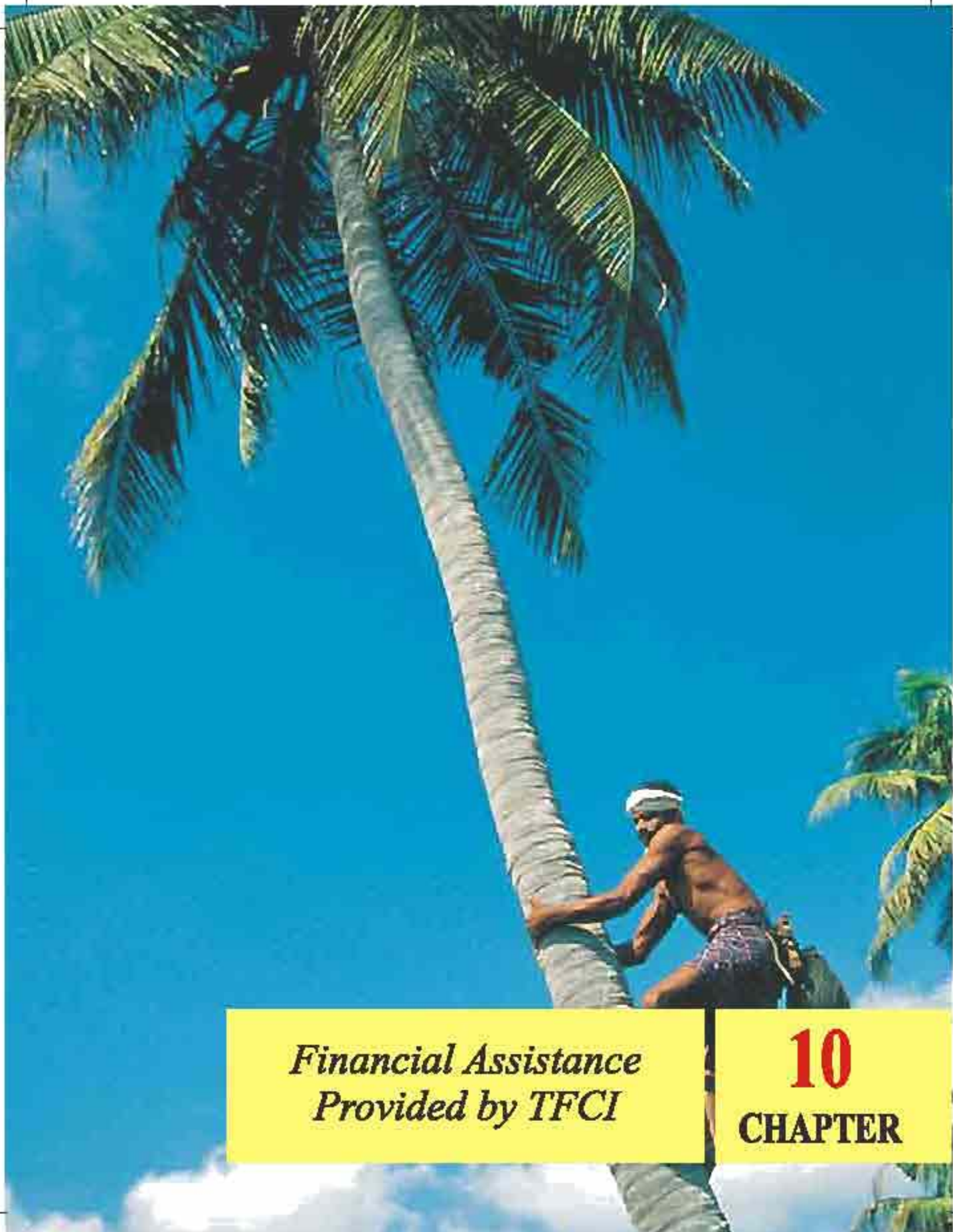
PROJECTED ANNUAL DEMAND FOR TRAINED MANPOWER

	Year 2010	Year 2020
Hotels	7000	10000
Restaurants	45000	45000
Total	52000	55,000

Key drivers of demand for trained manpower are likely to be the expansion of the organized sector, golden quadrilateral and preference for youth in the hospitality sector. Presently, 16850 students are being trained in hotel management, annually. Only 22% are graduating from the Government promoted institutes. Nearly 40% of them are pursuing alternative careers in other emerging service sectors (such as call centres).

These statistics indicate that there could be a severe shortage for trained manpower by the year 2010.

Detailed study report at Ministry of Tourism web site www.tourism.nic.in



*Financial Assistance
Provided by TFCI*

10
CHAPTER

FINANCIAL ASSISTANCE PROVIDED BY TOURISM FINANCE CORPORATION OF INDIA

The Tourism Finance Corporation of India(TFCI) was set up to meet the finance requirements of tourism industry in the country. The amount of loans sanctioned and disbursed by TFCI to various categories of tourism industries during 2004-05 with comparative picture of last two years are given in table 10.1.

Table 10.2 gives projectwise and purpose wise classification of financial assistance provided by TFCI during 2004.05.

TABLE 10.1

ASSISTANCE SANCTIONED AND DISBURSED BY TFCI

	2002-03 (Rs. In Million)	2003-04 (Rs. In Million)	2004-05 (Rs. In Million)
Assistance sanctioned			
Rupee Loan	312.70	468.60	977.00
Leasing	--	--	--
Subscription to Equity preference/share/Mutual fund/ Debenture	524.30	575.50	129.00
Gurantee	4.00	--	--
Total	841.00	1044.10	1106.00
Assistance disbursed			
Rupee Loan	402.70	297.70	589.70
Leasing	--	--	--
Director Subscription to Equity Preference share Mutual fund/Debenture	544.30	495.10	129.00
Gurantee	--	--	--
Total	947.00	792.80	718.70

Source:- Tourism Finance Corporation of India

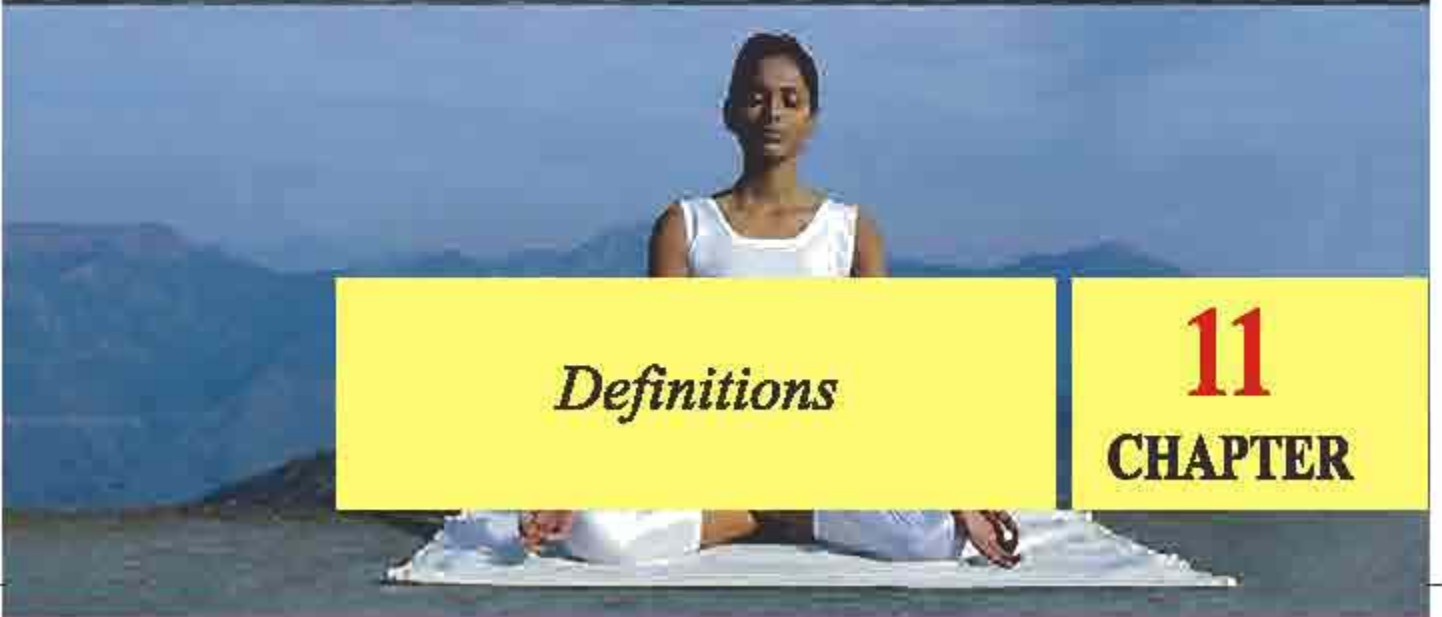
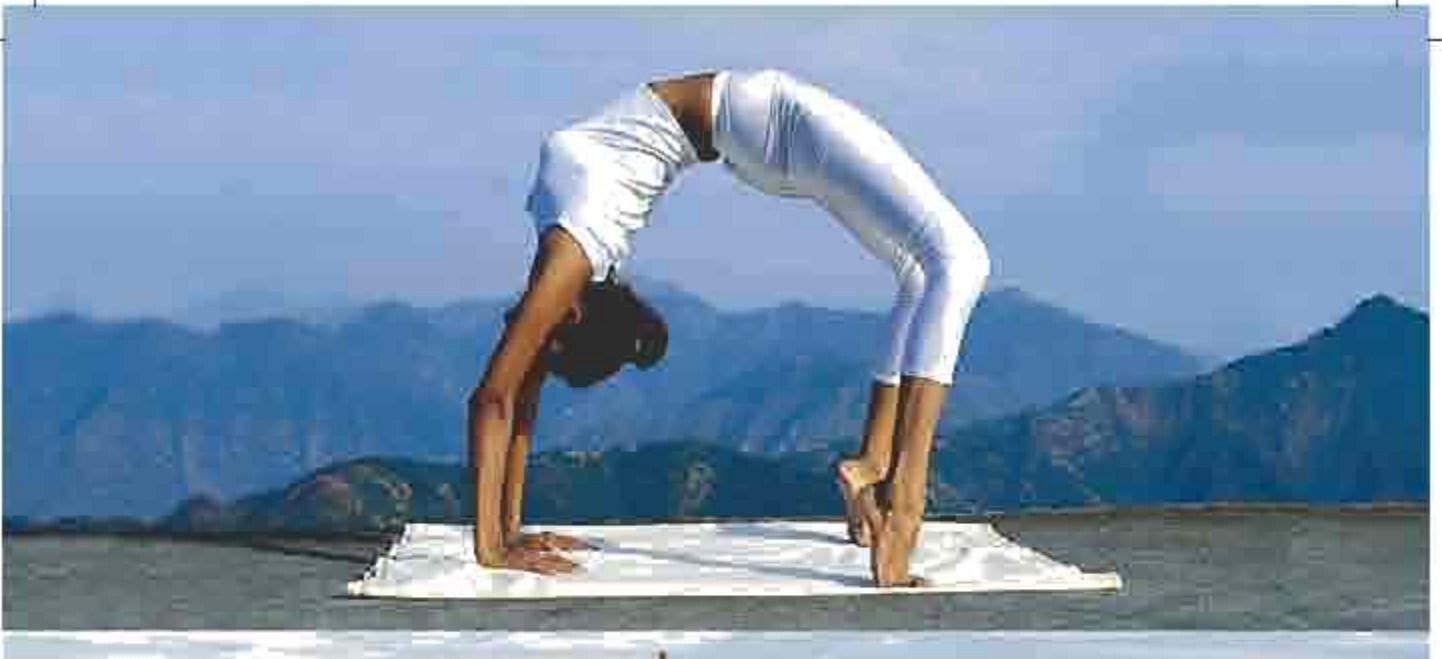
TABLE 10.2

**PROJECT WISE AND PURPOSE WISE CLASSIFICATION OF
FINANCIAL ASSISTANCE PROVIDED BY TFCI
DURING 2004-05 (RS. IN MILLION)**

Purpose	New		Expansion		Renovation/ Eq.Finance		Expansion/ Acq/Rest/Reno.		Total	
	No.	Amount	No.	Amount	No.	Amount	No.	Amount	No.	Amount
5 Star Hotel	1 (39)	250.00 (4819.60)	0 (13)	0.00 (767.60)	0 (14)	0.00 (430.80)	1 (8)	28.20 (812.70)	2 (74)	278.20 (6830.70)
4 Star Hotel	0 (25)	0.00 (1855.60)	0 (4)	0.00 (345.70)	0 (3)	0.00 (59.50)	0 (2)	0.00 (79.00)	0 (34)	0.00 (2339.80)
3 Star Hotel	0 (202)	53.50 (7677.90)	0 (19)	0.00 (1023.70)	0 (11)	0.00 (374.30)	6 (24)	197.60 (1280.70)	6 (256)	251.10 (10356.60)
2 Star Hotel	0 (18)	0.00 (293.30)	0 (1)	0.00 (38.80)	0 (0)	0.00 (7.00)	2 (2)	28.00 (32.30)	2 (21)	28.00 (371.40)
Heritage	0 (16)	0.00 (246.40)	0 (3)	0.00 (83.00)	0 (2)	0.00 (42.50)	0 (1)	0.00 (45.60)	0 (22)	0.00 (417.50)
Unclassified	0 (2)	0.00 (121.00)	0 (0)	0.00 (0.00)	0 (1)	0.00 (2.40)	0 (1)	0.0 (5.60)	0 (4)	0.00 (129.00)
Amusement/park/ shoping Complex -cum- ent. Centre/ Water Park	2 (25)	238.00 (1104.90)	0 (2)	0.00 (9.00)	0 (0)	0.00 (0.00)	2 (2)	91.70 (91.70)	4 (29)	329.70 (1205.60)
Restaurant	0 (11)	20.00 (225.40)	0 (3)	0.00 (183.50)	0 (3)	0.00 (10.90)	0 (1)	0.00 (30.50)	0 (18)	20.00 (450.30)
Tourist Cars/ Coaches	0 (2)	0.00 (24.10)	0 (3)	0.00 (132.60)	0 (2)	0.00 (60.00)	0 (0)	0.00 (0.00)	0 (7)	0.00 (216.70)
Places On Wheels	0 (1)	0.00 (115.00)	0 (0)	0.00 (0.00)	0 (1)	0.00 (100.00)	0 (0)	0.00 (0.00)	0 (2)	0.00 (215.00)
Others	1 (22)	199.00 (1443.30)	0 (3)	0.00 (360.00)	0 (1)	0.00 (12.00)	0 (0)	0.00 (87.90)	1 (26)	199.00 (1903.20)
Total	4	760.50	0	0.00	0	0.00	11	345.00	15	1106.00

Source:- Tourism Finance Corporation of India

Note:- Figures within parenthesis indicates the Cumulative hotels total.



Definitions

11
CHAPTER

11.1 DEFINITIONS FOLLOWED IN INDIA

1. Arrivals :

The data presented in this publication refer to the number of arrivals of tourists/visitors and not to the number of persons. The same individual who makes multiple trips to the country is counted each time as a new arrival. This is also true in the case of Indian nationals going abroad .

2. International Visitor :

An international visitor is any person visiting the country on a foreign passport and the main purpose of visit is other than the exercise of an activity remunerated from within the country or establishment of residence in the country.

This definition covers two segments of visitors: "Tourist" and "Same Day Visitors".

3. Foreign tourist :

A foreign tourist is a person visiting India on a foreign passport, staying at least twenty four hours in the country, the purpose of whose journey can be classified under one of the following headings:

- (i) Leisure (recreation, holiday, health, study, religion and sport);
- (ii) Business, family mission, meeting.

The following are not regarded as 'foreign tourist':

- (i) Person arriving with or without a contract, to take up an occupation or engage in activities remunerated from within the country;
- (ii) Persons coming to establish residence in the country;
- (iii) "Same Day Visitors" i.e. temporary visitors staying less than twenty four hours in the country (including travelers on cruises).

4. Excursionist :

A visitor in accordance with the foregoing definition and staying less than 24 hours in the country is treated as " Same Day Visitor" or "Excursionist".

5. Cruise Passenger:

A visitor, as defined above, who arrive in the country aboard cruise ships and do not spend a night at an accommodation establishment in the country is treated as a cruise passenger.

6. Ports :

Ports are the points of entry of foreign tourists into India . These include:

Name of port	Type of port	Name of port	Type of port
Agartala	Land Checkpost	Kailashahar	Land Checkpost
Agra Port	Airport	Kakinada	Seaport
Ahmedabad	Airport	Kandala	Seaport
Aland	Seaport	Karimaganj	Land Checkpost
Amritsar	Airport	Kolkatta	Airport
Attari Road	Land Checkpost	Lalgolaghat	Land Checkpost
Banbasa	Land Checkpost	Lucknow	Airport
Bangalor	Airport	Mahadipore	Land Checkpost
Bedi Bender	Seaport	Mankachar	Land Checkpost
Bhavnagar	Seaport	Marmagoa	Seaport
Calicut	Airport	Muhurighat	Land Checkpost
Calicut	Seaport	Mumbai	Airport
Changrabandha	Land Checkpost	Mumbai	Seaport
Chennai	Airport	Nagapattinam	Seaport
Chennai	Seaport	Nhava Sheva	Seaport
Cochin	Airport	Paradeep	Seaport
Cochin	Seaport	Patna	Airport
Coimbatore	Airport	Port Blair	Airport
Dabolim	Airport	Port Blair	Seaport
Dalalghat	Land Checkpost	Radhikapore	Land Checkpost
Dalu	Land Checkpost	Ranga	Land Checkpost
Dawki	Land Checkpost	Ranjganj	Land Checkpost
Delhi	Airport	Raxual	Land Checkpost
Gauriphanta	Land Checkpost	Rupaidiha	Land Checkpost
Gaya	Airport	Sonauli	Land Checkpost
Gede	Land Checkpost	Srimantapur	Land Checkpost
Ghojadanga	Land Checkpost	Sutarkandi	Land Checkpost
Guwahati	Airport	Trichy	Airport
Haridaspore	Land Checkpost	Trivandrum	Airport
Hill	Land Checkpost	Tuticorin	Seaport
Hyderabad	Airport	Varanasi	Airport
Jaigaon	Land Checkpost	Visakhapatnam	Seaport
Jaipur	Airport		

7. Regions:

The regional classification of countries used for the presentation of data in the publication, are as follows:

1. Africa comprise the continent of Africa including, Egypt and the adjoining islands
2. Australasia include Australia, New Zealand, Fiji and the Pacific Island groups like French Polynesia, Papua New Guinea, New Caledonia etc.
3. EastAsia comprise China, Hongkong, Japan, Korea, Macau etc.
4. West Asia comprise countries in the Middle East including Turkey, Cyprus and Persian Gulf countries excluding Iran
5. South Asia Includes Iran, Afghanistan, Sri Lanka, Maldives and countries of the Indian sub continent.
6. South East Asia comprise countries of Indo-China including Myanmar & ASEAN countries.
7. NorthAmerica includes Canada and USA.
8. Central and South America comprise of countries in the Central and South America, and the Caribbean Islands.
9. Eastern Europe comprise of all the countries of former Soviet Union, Yougoslavia and Czechoslovakia, Hungary, Poland and others.
10. Western Europe includes all the countries of Europe excluding East European countries, Turkey and Cyprus.

8. Domestic tourist:

A domestic tourist is a person who travels within the country to a place other than his usual place of residence and stays at hotels or other accommodation establishments run on commercial basis or in dharamshalas /sarais/ musafir khanas/ agra-shalas/ choultries etc. for a duration of not less than 24 hours or one night and for not more than 12 months at a time for any of the following purposes:-

- i) Pleasure (holiday, leisure, sports etc.);
- ii) Pilgrimage , religious and social functions;
- iii) Business conferences and meetings; and
- iv) Study and health

The following are not regarded as domestic tourists

- i) Persons arriving with or without a contract to take up an occupation or engage in activities remunerated from within the State/Centre.
- ii) Persons coming to establish more or less permanent residence in the State.
- iii) Persons visiting their hometown or native place on leave or a short visit for meeting relations and friends, attending social and religious functions etc, and stay in their own homes or with relatives and friends and not using any sight seeing facilities in their own homes or with relatives and friends and not using any sight seeing facilities.
- iv) Foreigners resident in India

9. Indian nationals going abroad:

Any persons going abroad with an Indian passport is regarded as an Indian national going abroad irrespective of the purpose and the destination.

10. Travel receipts/Foreign Exchange Earnings from Tourism:

These are receipt of the country as a result of consumption expenditure i.e. payment made for goods and services acquired by foreign visitors in the economy out of foreign currency brought by them.

11. Accommodation establishments:

Places in which rooms are provided to tourists for stay, and classified as hotel, tourist bungalow, travelers' lodge, youth hostel, etc.

12. Approved hotels:

Hotels which conform to certain laid down standards on physical features, standards of facilities and other services are approved by the Tourism Departments of Central and State Government and are known as approved hotels. These are graded variously as five star deluxe, five star, four star, etc.

13. Occupancy:

The occupancy rate refers to the ratio between available capacity (in terms of rooms or beds) and the extent to which it is used. Occupancy is worked out on the basis of number of rooms occupied by both domestic and international tourists.

11.2 INTERNATIONAL DEFINITIONS

Tourism: The activities of persons travelling to and in place outside their usual environment for not more than one consecutive year for leisure, business and other purposes.

Domestic Tourism : Residents of a given country travelling only within their country.

Inbound Tourism : In relation to a given country residents travelling in the given country.

Outbound Tourism : In relation to a given country, residents travelling another country.

Internal Tourism : Domestic and Inbound Tourism.

National Tourism : Domestic and Out-bound Tourism.

International Tourism: Inbound and Outbound Tourism.

Visitors: All type of travelers engaged in tourism are described as Visitors, and as such the term represents the basic concept for the whole system of tourism statistics.

International Visitors : Any person who travels to a country other than that in which is his/her usual residence but outside his/her usual environment for a period not exceeding 12 months and whose main purpose of visit is other the exercise of an activity remunerated from within the country visited.

International Visitors include:

- * **Tourist (overnight visitors):** A visitor who stays at least one night in a collective of private accommodation in the country visited.
- * **Same Day Visitors:** A visitor who does not spend the night in a collective or private accommodation in the country visited. This definition includes cruise ships and return to the ship every night to sleep on board even though the ship remains in port for several days. Also included in this group are, by extension, owners or passengers of Yachts, and passengers on a group tour accommodated in a train.

Domestic Visitors: Any person residing in a country who travels to a place within the country, outside his/her usual environment for a period not exceeding 12 months, and whose main purpose of visit is other than the exercise of an activity remunerated from within the place visited.

Domestic visitors include:

- * **Tourists(overnight visitors):** Visitors who stay at least one night in a collective or private accommodation in the place visited.
- * **Some Day visitors :** Visitors who do not spend one night in a collective or private accommodation in the place visited.

11.3 SOURCES OF DATA

1. Arrival Statistics

Statistics of foreign tourist arrivals contained in this publication are compiled from disembarkation cards filled in by the foreign tourists at the time of their entry into India through various airports/seaports/land checkposts.

2. Foreign exchange earnings

Statistics of foreign exchange earnings included in this publication are the estimates prepared by the Reserve Bank of India as part of Balance of Payment Statistics.

3. World tourism statistics

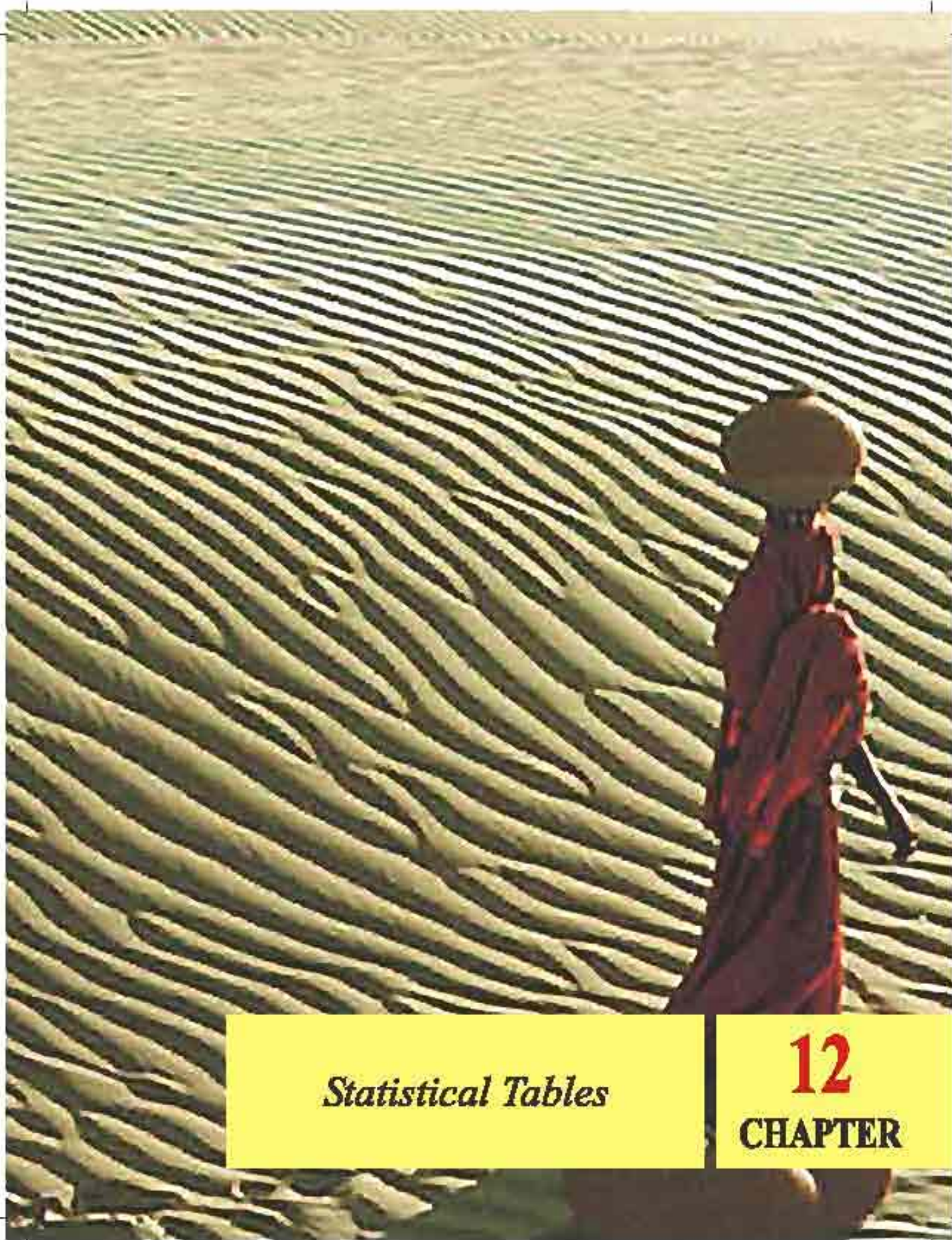
Statistics of world tourism movements and international tourism receipts are collected from various publications and bulletins of World Tourism Organisation (WTO).

4. Domestic tourism statistics

The domestic tourism statistics included in this report are based on the figures furnished by the State Tourism Departments and surveys conducted by the Department.

5. Hotel statistics

Statistics of number of hotels, number of rooms and estimated average occupancy are compiled from approval records of the Department and the periodical monthly information on occupancy furnished by the approved hotels. Major findings of the survey conducted by the Federation of Hotel & Restaurant Association of India for the year 2003-2004 about Hotel Occupancy and Analysis of Guests have also been added in the publication.



Statistical Tables

12
CHAPTER

TABLE- 12.1

**MONTH-WISE FOREIGN TOURIST ARRIVALS IN INDIA DURING
2004 AND CORRESPONDING FIGURES FOR 2002 AND 2003**

Month	Foreign Tourist Arrivals			Percentage Change	
	2002	2003	2004	2003/02	2004/03
JANUARY	228160	274215	337345	20.2	23.0
FEBRUARY	241133	262692	331697	8.9	26.3
MARCH	216639	218473	293185	0.8	34.2
APRIL	159789	160941	223684	0.7	39.1
MAY	144571	141508	185502	-2.1	31.1
JUNE	134558	176324	223122	31.0	26.5
JULY	178231	225359	272456	26.4	20.9
AUGUST	162594	204940	253301	26.0	23.6
SEPTEMBER	163089	191339	226773	17.3	16.5
OCTOBER	213287	260569	307447	22.2	16.0
NOVEMBER	245661	290583	385238	18.3	32.6
DECEMBER	296474	319271	417527	7.7	30.8
TOTAL	2384384	2726214	3457477	14.3	26.8

TABLE 12.2
MONTH -WISE FOREIGN EXCHANGE EARNINGS (IN RS. CRORE)
DURING 2004 AND CORRESPONDING FIGURES FOR 2002 AND 2003

Month	Foreign Exchange Earnings			Percentage Change	
	2002	2003	2004*	2003/02	2004/03
January	1228.68	1505.06	2084.59	22.5	38.5
February	1294.42	1441.82	2049.70	11.4	42.2
March	1176.90	1199.12	1811.71	1.9	51.1
April	1102.45	1153.00	1368.42	4.6	18.7
May	948.76	1013.79	1133.82	7.1	11.8
June	905.79	1263.21	1363.76	39.6	8.0
July	1253.98	1488.52	1778.60	18.7	19.4
August	1127.49	1353.66	1651.69	20.1	22.0
Sep	1107.53	1263.82	1478.71	14.1	17.0
Oct	1111.26	1421.06	1908.36	27.9	34.2
Nov	1351.30	1584.74	2388.71	17.3	50.7
Dec	1588.44	1741.20	2588.93	9.6	48.7
Total	14195.00	16429.00	21603.00	15.7	31.8

MONTH-WISE FOREIGN EXCHANGE EARNINGS (IN MILLION US \$)
DURING 2004 AND CORRESPONDING FIGURES FOR 2002 AND 2003

Month	Foreign Exchange Earnings			Percentage Change	
	2002	2003	2004*	2003/02	2004/03
January	253.04	315.10	460.67	24.5	46.2
February	266.58	301.85	452.96	13.2	50.1
March	242.38	251.05	400.37	3.6	59.5
April	225.34	245.06	304.77	8.8	24.4
May	193.52	215.47	252.51	11.3	17.2
June	185.14	268.47	303.72	45.0	13.1
July	258.06	323.73	384.87	25.4	18.9
August	232.03	294.40	357.80	26.9	21.5
Sep	227.91	274.87	320.33	20.6	16.5
Oct	230.15	312.23	423.97	35.7	35.8
Nov	279.87	348.20	531.25	24.4	52.6
Dec	328.98	382.57	575.78	16.3	50.5
Total	2923.00	3533.00	4769.00	28.9	35.0

*=Provisional

TABLE - 12.3

**TOURIST ARRIVALS IN INDIA BY COUNTRY OF NATIONALITY
DURING 2003 & 2004**

Country of Nationality	Arrival 2003	Prop. to the total (%)	Arrival 2004	Prop. to the total (%)	%Change (2004/03)
NORTH AMERICA					
Canada	107671	3.8	135884	3.9	26.2
U.S.A	410803	15.1	526120	15.2	28.1
Others	0	0.0	0	0.0	—
Total	518474	19.0	662004	19.1	27.7
CENTRAL AND SOUTH AMERICA					
Brazil	4528	0.2	7397	0.2	63.4
Mexico	3563	0.1	4570	0.1	28.3
Others	13563	0.5	16198	0.5	19.4
Total	21654	0.8	28165	0.8	30.1
WESTERN EUROPE					
Austria	16903	0.6	21093	0.6	24.8
Belgium	17309	0.6	24007	0.7	38.7
Denmark	11327	0.4	15805	0.5	39.6
Finland	8001	0.3	12526	0.4	56.6
France	97664	3.6	131824	3.8	35.0
Germany	76868	2.8	116679	3.4	51.8
Greece	3455	0.1	4468	0.1	28.3
Ireland	7083	0.3	8996	0.3	27.0
Italy	46908	1.7	65661	1.9	39.8

TABLE - 12.3

**TOURIST ARRIVALS IN INDIA BY COUNTRY OF NATIONALITY
DURING 2003 & 2004**

Country of Nationality	Arrival 2003	Prop. to the total (%)	Arrival 2004	Prop. to the total (%)	%Change (2004/03)
Netherlands	40565	1.5	51211	1.5	26.2
Norway	8400	0.3	10631	0.3	26.6
Portugal	8158	0.3	10548	0.3	30.5
Spain	30551	1.1	42895	1.2	40.4
Sweden	18096	0.7	26154	0.8	44.5
Switzerland	24463	0.9	28260	0.8	15.5
U.K.	430917	15.8	555907	16.1	29.0
Others	1306	0.0	1633	0.0	25.0
Total	847966	31.1	1128297	32.6	33.1
EASTERN EUROPE					
Czechoslovakia	3466	0.1	4114	0.1	18.7
Poland	6336	0.2	8445	0.2	33.3
C.I.B.	38526	1.4	61167	1.6	58.6
Others	6924	0.3	8680	0.3	25.4
Total	55252	2.0	82426	2.4	49.2
AFRICA					
Egypt	3382	0.1	3781	0.1	11.8
Kenya	16563	0.6	17536	0.5	5.9
Mauritius	16306	0.6	19823	0.6	21.6
Nigeria	5713	0.2	6659	0.2	16.6

TABLE - 12.3

**TOURIST ARRIVALS IN INDIA BY COUNTRY OF NATIONALITY
DURING 2003 & 2004**

Country of Nationality	Arrival 2003	Prop. to the total (%)	Arrival 2004	Prop. to the total (%)	%Change (2004/03)
South Africa	23873	0.9	32148	0.9	34.7
Tanzania	8515	0.3	9953	0.3	16.9
Others	18999	0.7	25591	0.7	34.7
Total	93353	3.4	115493	3.3	23.7
WEST ASIA					
Bahrain	4182	0.2	4414	0.1	5.5
Israel	32157	1.2	39063	1.1	21.5
Oman	12352	0.5	14927	0.4	20.8
Saudi Arabia	9951	0.4	11929	0.3	19.8
Turkey	5528	0.2	7008	0.2	26.8
U.A.E.	21374	0.8	22668	0.7	6.1
Yemen Arab Rep.	7717	0.3	8826	0.3	14.4
Others	10325	0.4	13953	0.4	35.1
Total	103596	3.8	122808	3.6	18.5
SOUTH ASIA					
Afghanistan	10079	0.4	12705	0.4	26.1
Iran	17639	0.6	24733	0.7	41.0
Maldives	18346	0.7	21099	0.8	15.0
Nepal	42771	1.6	51534	1.5	20.5
Pakistan	10364	0.4	67418	1.9	550.5

TABLE - 12.3

**TOURIST ARRIVALS IN INDIA BY COUNTRY OF NATIONALITY
DURING 2003 & 2004**

Country of Nationality	Arrival 2003	Prop. to the total (%)	Arrival 2004	Prop. to the total (%)	%Change (2004/03)
Bangladesh	454611	16.7	477446	13.8	5.0
Sri Lanka	109098	4.0	128711	3.7	18.0
Bhutan	4082	0.1	7054	0.2	72.8
Total	666889	24.5	780698	22.8	18.6
SOUTH EAST ASIA					
Indonesia	9078	0.3	11408	0.3	25.7
Malaysia	70750	2.6	84390	2.4	19.3
Myanmar	3609	0.1	4932	0.1	36.7
Philippines	8091	0.3	10492	0.3	29.7
Singapore	48368	1.8	60710	1.8	25.5
Thailand	26754	0.9	33442	1.0	29.9
Others	3276	0.1	3736	0.1	14.0
Total	188929	6.2	209110	6.0	23.8
EAST ASIA					
China(Main)	21152	0.8	34100	1.0	61.2
China(Taiwan)	12685	0.5	18179	0.6	43.3
Japan	77996	2.9	96851	2.8	24.2
Korea(South)	35584	1.3	47835	1.4	34.4
Others	3089	0.1	4662	0.1	50.9
Total	150606	5.6	201627	5.8	34.0

TABLE - 12.3

**TOURIST ARRIVALS IN INDIA BY COUNTRY OF NATIONALITY
DURING 2003 & 2004**

Country of Nationality	Arrival 2003	Prop. to the total (%)	Arrival 2004	Prop. to the total (%)	%Change (2004/03)
AUTRALASIA					
Australia	56730	2.2	81606	2.4	39.0
New Zealand	13283	0.5	16762	0.5	26.2
Others	1836	0.1	2574	0.1	40.2
Total	73849	2.7	100944	2.9	36.7
Others	10233	0.4	14471	0.4	41.4
Stateless	15516	0.6	1434	0.0	-90.8
Grand Total	2726214	100.0	3457477	100.0	26.8

Source : Bureau of Immigration

TABLE 12.4
QUATERLY BREAKUP OF FOREIGN TOURIST ARRIVALS - 2004

Country of Nationality	Arrivals (in number)	Proportion to the total (%)			
		1st Quarter Jan-Mar	2nd Quarter April-June	3rd Quarter July-Sep	4th Quarter Oct-Dec
NORTH AMERICA					
Canada	135884	32.2	13.8	16.4	37.6
U.S.A	526120	25.9	20.5	19.5	34.0
Others	0	0	0	0	0
Total	662004	27.2	19.1	18.9	34.8
CENTRAL AND SOUTH AMERICA					
Brazil	7397	38.1	16.9	15.3	29.7
Mexico	4570	25.2	20.9	22.5	31.3
Others	16198	27.6	16.7	24.8	31
Total	28165	30.6	17.5	21.1	30.8
WESTERN EUROPE					
Austria	21093	28.9	15.6	22.1	33.4
Belgium	24007	26.3	15.8	23.7	34.3
Denmark	15805	28.4	16.0	17.7	37.9
Finland	12525	31.2	11.5	12.9	44.4
France	131824	29.5	16.7	24.1	29.7
Germany	116679	31.2	15.7	19.7	33.3
Greece	4468	31.2	13.9	19.8	35.2
Ireland	8996	28.8	17.8	20.8	32.9
Italy	65561	27.1	12.3	26.8	33.8
Netherlands	51211	28.3	15.0	23.7	33.1

TABLE 12.4
QUATERLY BREAKUP OF FOREIGN TOURIST ARRIVALS - 2004

Country of Nationality	Arrivals (in number)	Proportion to the total (%)			
		1st Quarter Jan-Mar	2nd Quarter April-June	3rd Quarter July-Sep	4th Quarter Oct-Dec
Norway	10631	34.3	17.5	16.1	32.0
Portugal	10648	25.9	18.2	17.2	38.8
Spain	42895	17.1	11.9	42.6	28.4
Sweden	26154	33.7	13.9	13.8	38.6
Switzerland	28260	29.0	14.4	19.3	37.3
U.K.	555907	32.9	14.9	17.7	34.5
Others	1633	23.9	16.5	22.0	37.5
Total	1128297	30.7	15.0	20.5	33.8
EASTERN EUROPE					
Czechoslovakia	4114	30.6	12.9	22.9	33.6
Poland	8445	30.4	16.2	21.1	32.3
C.I.S.	61187	30.0	16.6	14.4	39.1
Others	8680	31.5	15.0	21.0	32.5
Total	82426	30.6	16.1	15.9	37.4
AFRICA					
Egypt	3781	26.0	21.5	24.0	28.5
Kenya	17538	26.7	17.4	21.3	34.6
Mauritius	19823	26.2	18.9	25.3	29.6
Nigeria	6659	25.8	20.5	24.2	29.5
South Africa	32148	28.6	14.3	19.6	37.2
Tanzania	9953	22.7	17.8	21.3	38.2

TABLE 12.4
QUATERLY BREAKUP OF FOREIGN TOURIST ARRIVALS - 2004

Country of Nationality	Arrivals (In number)	Proportion to the total (%)			
		1st Quarter Jan-Mar	2nd Quarter April-June	3rd Quarter July-Sep	4th Quarter Oct-Dec
Others	25691	26.4	18.4	24.6	30.6
Total	115493	26.4	17.5	22.7	33.4
WEST ASIA					
Bahrain	4414	20.9	24.1	33.9	21.1
Israel	39083	27.2	18.9	25.6	28.3
Oman	14927	20.4	22.7	34.6	22.3
Saudi Arabia	11929	21.0	26.1	32.8	20.1
Turkey	7008	35.5	15.1	14.8	34.6
U.A.E.	22668	14.8	26.2	47.1	11.9
Yemen Arab Rep.	8826	22.0	23.3	32.4	22.3
Others	13953	27.3	19.7	25.0	28.0
Total	122808	23.3	22.0	31.8	22.9
SOUTH ASIA					
Afghanistan	12705	33.8	20.3	18.5	27.4
Iran	24733	34.4	15.3	24.2	26.1
Maldives	21099	23.4	24.9	26.3	25.4
Nepal	51534	22.4	21.4	24.5	31.8
Pakistan	67416	14.1	19.7	29.2	37.0
Bangladesh	477446	27.2	24.3	22.9	25.7
Sri Lanka	128711	23.5	20.5	30.1	25.8
Bhutan	7054	26.0	22.1	27.2	24.7

TABLE 12.4
QUATERLY BREAKUP OF FOREIGN TOURIST ARRIVALS - 2004

Country of Nationality	Arrivals (In number)	Proportion to the total (%)			
		1st Quarter Jan-Mar	2nd Quarter April-June	3rd Quarter July-Sep	4th Quarter Oct-Dec
Total	790698	25.4	22.7	24.8	27.1
SOUTH EAST ASIA					
Indonesia	11408	26.6	19.6	20.9	32.8
Malaysia	84390	24.0	17.4	20.6	38.1
Myanmar	4932	32.0	12.6	15.9	39.5
Philippines	10492	27.0	21.2	25.2	26.6
Singapore	60710	22.9	21.2	20.6	35.3
Thailand	33442	28.5	19.0	20.1	32.4
Others	3736	27.7	16.3	24.8	31.2
Total	209110	25.0	18.9	20.7	35.4
EAST ASIA					
China(Main)	34100	27.4	19.2	21.4	32.1
China(Taiwan)	18179	23.4	17.3	32.2	27.1
Japan	96851	29.9	16.0	25.4	28.7
Korea(South)	47835	35.3	15.1	22.3	27.2
Others	4662	32.1	14.2	23.2	30.5
Total	201627	30.0	17.4	24.6	27.9
AUTRALASIA					
Australia	81608	25.0	14.8	19.1	41.1
New Zealand	16762	24.0	14.5	18.4	43.1
Others	2574	24.5	15.1	21.4	39.1

TABLE 12.4
QUATERLY BREAKUP OF FOREIGN TOURIST ARRIVALS - 2004

Country of Nationality	Arrivals (In number)	Proportion to the total (%)			
		1st Quarter Jan-Mar	2nd Quarter April-June	3rd Quarter July-Sep	4th Quarter Oct-Dec
Total	100944	24.9	14.7	19.0	41.4
Others	14471	27.3	13.8	19.9	39.0
Stateless	1434	37.6	12.6	15.9	33.9
Grand Total	3457477	27.8	18.3	21.8	32.1

Source : Bureau of Immigration

TABLE-12.5

**CLASSIFICATION OF FOREIGN TOURISTS
ACCORDING TO AGE GROUPS - 2004**

Country of Nationality	Arrivals in number	Proportion to the total (%)							
		0-14 Years	15-24 Years	25-34 Years	35-44 Years	45-54 Years	55-64 Years	65 years & above	Not reported
NORTH AMERICA									
Canada	135884	15.5	7.7	14.4	16.9	18.8	13.4	12.6	2.7
U.S.A	526120	18.3	7.7	11.9	17.9	18.9	14.0	7.9	3.4
Others	0	0	0	0	0	0	0	0	0
Total	662004	17.7	7.7	12.4	17.7	18.4	13.8	8.9	3.4
CENTRAL AND SOUTH AMERICA									
Brazil	7397	2.2	6.8	21.9	24.3	22.4	13.0	8.5	0.7
Mexico	4570	3.3	9.6	26.0	18.9	19.1	13.8	8.5	0.8
Others	16198	4.5	7.7	21.8	22.0	21.0	13.8	8.6	0.9
Total	28165	3.7	7.8	22.5	22.2	21.0	13.4	8.6	0.8
WESTERN EUROPE									
Austria	21093	8.8	7.5	16.5	22.6	20.0	17.4	8.5	0.7
Belgium	24007	5.0	7.9	18.2	21.8	22.9	15.9	7.6	0.7
Denmark	15805	6.2	8.2	17.6	21.2	20.0	18.6	7.7	0.5
Finland	12525	4.3	7.1	21.3	23.9	21.6	16.3	4.8	0.4
France	131824	6.7	7.8	18.2	18.5	21.3	18.2	9.5	0.8
Germany	116679	4.2	6.0	16.1	26.2	21.0	16.5	9.5	0.5
Greece	4468	1.8	5.6	20.3	25.7	23.1	15.0	8.0	0.5
Ireland	8996	5.3	12.2	28.8	21.3	15.9	9.9	4.8	1.9
Italy	65661	2.2	4.2	19.1	24.4	23.0	18.1	8.6	0.4
Netherlands	51211	5.6	6.9	18.6	23.0	22.3	16.7	8.2	0.7
Norway	10631	10.2	13.0	17.2	20.0	20.1	13.4	5.3	0.8

TABLE-12.5

**CLASSIFICATION OF FOREIGN TOURISTS
ACCORDING TO AGE GROUPS - 2004**

Country of Nationality	Arrivals in number	Proportion to the total (%)							
		0-14 Years	15-24 Years	25-34 Years	35-44 Years	45-54 Years	55-64 Years	65 years & above	Not reported
Portugal	10848	5.0	5.8	17.8	21.7	22.2	15.4	11.5	0.6
Spain	42895	2.2	5.9	32.3	23.5	19.6	11.0	4.9	0.6
Sweden	28154	6.4	12.5	19.3	18.2	19.8	16.4	6.8	0.6
Switzerland	28260	4.5	8.5	17.8	20.1	21.5	18.2	8.9	0.5
U.K.	555907	9.2	9.1	15.5	18.3	20.7	15.7	10.8	0.7
Others	1633	4.8	7.1	19.3	22.3	21.2	18.5	8.1	0.7
Total	1128297	6.9	8.0	17.4	20.3	21.1	16.2	9.4	0.7
EASTERN EUROPE									
Czechoslovakia	4114	1.5	10.7	36.8	17.7	16.6	11.7	4.8	0.4
Poland	8445	2.0	8.4	30.0	20.7	22.2	11.0	5.3	0.4
C.I.S.	61187	3.5	8.7	24.2	25.1	24.4	9.6	3.5	1.0
Others	8680	2.7	12.4	30.2	22.0	18.5	8.7	4.8	0.7
Total	82428	3.8	9.2	28.0	23.3	21.0	9.6	4.5	0.8
AFRICA									
Egypt	3781	3.1	4.2	17.8	30.5	26.2	11.4	8.5	0.5
Kenya	17538	9.2	11.0	16.2	20.1	20.5	12.4	9.7	0.9
Mauritius	18923	6.9	10.9	15.9	20.8	23.8	12.7	8.5	0.7
Nigeria	6659	2.8	8.9	35.5	27.2	14.2	4.1	6.8	0.9
South Africa	32148	6.8	8.2	18.5	22.0	21.2	12.9	9.7	0.7
Tanzania	9953	10.1	10.6	17.5	21.3	18.9	9.9	10.5	1.2
Others	25591	6.0	12.5	21.0	23.8	19.6	8.8	7.5	0.8
Total	115493	7.0	10.1	19.1	22.4	20.8	11.1	8.8	0.7

TABLE-12.5

**CLASSIFICATION OF FOREIGN TOURISTS
ACCORDING TO AGE GROUPS - 2004**

Country of Nationality	Arrivals in number	Proportion to the total (%)							Not reported
		0-14 Years	15-24 Years	25-34 Years	35-44 Years	45-54 Years	55-64 Years	65 years & above	
WEST ASIA									
Bahrain	4414	12.1	16.3	12.7	16.7	18.2	10.2	12.2	1.6
Israel	39083	2.2	24.1	25.0	13.1	16.5	11.5	7.2	0.4
Oman	14927	8.9	22.9	20.2	17.0	14.1	8.3	7.3	1.3
Saudi Arabia	11929	9.0	10.0	18.6	23.9	18.1	9.5	9.8	1.1
Turkey	7008	2.6	5.3	26.4	27.0	19.8	10.9	7.2	0.8
U.A.E.	22668	18.9	17.2	15.1	14.8	15.4	8.4	8.3	1.9
Yemen Arab Rep.	8826	8.4	24.0	20.0	17.7	12.8	7.6	8.5	1.0
Others	13953	6.8	9.8	21.9	25.4	18.7	8.7	7.8	0.9
Total	122808	8.1	18.3	20.9	17.6	16.4	9.7	8.0	1.0
SOUTH ASIA									
Afghanistan	12705	12.5	13.4	20.3	15.8	12.0	6.0	19.2	1.0
Iran	24733	6.7	15.2	20.1	19.8	17.4	7.7	12.3	0.8
Maldives	21099	11.5	14.8	23.6	21.2	13.2	7.3	6.5	1.9
Nepal	51534	6.0	15.3	24.5	22.5	14.4	5.1	11.2	1.0
Pakistan	67416	17.0	14.2	16.4	15.1	16.1	11.6	6.7	0.7
Bangladesh	477446	3.8	12.6	26.1	26.8	18.7	7.8	4.3	0.1
Sri Lanka	128711	7.8	10.7	18.2	20.4	18.2	13.6	9.5	1.8
Bhutan	7054	4.8	18.8	25.3	21.9	11.7	2.8	14.1	0.9
Total	790998	5.2	12.5	24.4	24.6	17.5	8.3	8.8	0.4
SOUTH EAST ASIA									
Indonesia	11408	5.0	7.5	23.2	25.2	21.9	10.5	6.1	0.6

TABLE-12.5

**CLASSIFICATION OF FOREIGN TOURISTS
ACCORDING TO AGE GROUPS - 2004**

Country of Nationality	Arrivals in number	Proportion to the total (%)							Not reported
		0-14 Years	15-24 Years	25-34 Years	35-44 Years	45-54 Years	55-64 Years	65 years & above	
Malaysia	84390	8.2	9.2	17.2	23.6	21.3	12.2	7.5	0.6
Myanmar	4932	2.0	6.1	16.2	21.1	23.1	19.8	11.2	0.4
Philippines	10492	3.4	5.4	28.3	31.0	20.8	6.3	4.3	0.7
Singapore	60710	7.8	6.8	18.8	28.0	22.0	9.7	6.5	0.8
Thailand	33442	7.9	9.7	19.8	23.0	20.8	10.4	7.8	0.8
Others	3736	3.3	12.6	28.1	22.6	20.1	7.8	4.8	0.7
Total	209110	7.4	8.2	18.5	25.1	21.4	10.9	7.7	0.8
EAST ASIA									
China(Main)	34100	1.2	6.4	31.1	31.3	17.0	7.7	4.8	0.5
China(Taiwan)	18179	2.0	3.9	21.7	26.0	24.1	13.0	9.0	0.3
Japan	98851	2.4	13.1	21.8	19.0	17.8	15.5	10.1	0.3
Korea(South)	47835	4.8	16.1	23.5	26.4	16.7	7.0	5.1	0.4
Others	4662	5.7	11.2	24.0	28.2	18.1	7.1	5.2	0.6
Total	201627	2.8	11.8	23.8	23.7	18.0	11.7	7.8	0.4
AUTRALASIA									
Australia	81608	9.2	9.0	17.6	21.3	21.9	13.1	6.6	1.3
New Zealand	16762	11.9	8.3	18.8	21.8	19.4	11.3	8.2	2.3
Others	2574	5.0	8.8	17.5	20.9	22.6	14.9	9.8	0.5
Total	100944	9.6	8.8	17.7	21.4	21.5	12.8	6.7	1.5
Others	14471	5.7	9.8	21.4	21.0	19.8	12.1	9.2	1.0
Stateless	1434	4.4	8.9	17.1	22.1	21.7	18.7	8.4	0.7
Grand Total	3457477	8.5	9.8	18.8	21.3	19.4	12.8	8.2	1.2

Source: Bureau of Immigration

TABLE 12.6
CLASSIFICATION OF FOREIGN TOURISTS
ACCORDING TO GENDER - 2004

Country of Nationality	Arrivals in number	Proportion to the total (%)		
		Male	Female	Not reported
NORTH AMERICA				
Canada	135884	42.8	33.1	24.1
U.S.A.	526120	51.3	37.5	11.2
Others	0	0	0	0
Total	662004	49.6	36.6	13.8
CENTRAL AND SOUTH AMERICA				
Brazil	7397	49.6	36.8	13.8
Mexico	4570	41.5	38.8	19.7
Total	28165	45.8	37.3	16.9
WESTERN EUROPE				
Austria	21003	46.5	36.7	17.8
Belgium	24007	50.0	34.3	15.7
Denmark	15805	48.8	33.2	18.0
Finland	12525	48.2	38.3	13.5
France	131824	46.6	37.6	15.8
Germany	116679	54.6	30.7	14.7
Greece	4468	46.6	34.3	18.9
Ireland	8996	52.1	37.8	10.1

TABLE 12.6
CLASSIFICATION OF FOREIGN TOURISTS
ACCORDING TO GENDER - 2004

Country of Nationality	Arrivals in number	Proportion to the total (%)		
		Male	Female	Not reported
Italy	65561	47.7	34.9	17.4
Netherlands	61211	47.6	31.7	20.7
Norway	10631	51.7	32.9	15.4
Portugal	10648	56.4	33.2	10.4
Spain	42895	38.6	38.3	23.1
Sweden	26154	50.8	35.3	13.9
Switzerland	28260	47.6	37.9	14.5
U.K.	555907	50.9	38.3	10.8
Others	1633	49.0	35.3	15.7
Total	1128297	49.6	36.6	13.8
EASTERN EUROPE				
Czechoslovakia	4114	53.9	30.5	15.6
Poland	8445	47.6	33.6	18.8
C.I.S.	61187	51.4	19.8	28.8
Others	8660	38.7	27.9	33.4
Total	82426	48.1	35.4	16.5
AFRICA				
Egypt	3781	75.6	13.8	10.6
Kenya	17638	61.3	35.8	2.9

TABLE 12.6
CLASSIFICATION OF FOREIGN TOURISTS
ACCORDING TO GENDER - 2004

Country of Nationality	Arrivals in number	Proportion to the total (%)		
		Male	Female	Not reported
Mauritius	19823	43.7	49.1	7.2
Nigeria	6659	75.8	17.2	7.0
South Africa	32148	48.3	47.7	4.0
Tanzania	9953	57.4	40.7	1.9
Others	25591	59.7	30.9	9.4
Total	115493	55.1	39.1	5.8
WEST ASIA				
Bahrain	4414	65.6	32.1	2.3
Israel	39083	57.1	32.0	10.9
Oman	14927	74.0	24.1	1.9
Saudi Arabia	11929	75.0	20.1	4.9
Turkey	7008	48.2	30.8	20.0
U.A.E.	22688	58.0	41.4	2.6
Yemen Arab Rep.	8828	77.7	21.1	1.2
Others	13953	69.7	20.3	10.0
Total	122808	63.5	29.4	7.1
SOUTH ASIA				
Afghanistan	12705	43.8	17.3	38.9
Iran	24733	55.1	32.8	11.1

TABLE 12.6
CLASSIFICATION OF FOREIGN TOURISTS
ACCORDING TO GENDER - 2004

Country of Nationality	Arrivals in number	Proportion to the total (%)		
		Male	Female	Not reported
Maldives	21099	55.7	43.7	0.6
Nepal	51534	53.2	21.5	25.3
Pakistan	67416	65.3	36.7	6.0
Bangladesh	477446	73.7	24.5	1.8
Sri Lanka	128711	60.0	38.4	1.6
Bhutan	7054	56.4	26.3	17.3
Total	790698	66.7	26.6	4.7
SOUTH EAST ASIA				
Indonesia	11408	56.4	32.9	10.7
Malaysia	84390	58.5	34.5	7.0
Myanmar	4932	60.0	31.7	8.3
Philippines	10492	57.1	33.4	9.5
Singapore	60710	59.4	32.7	7.9
Thailand	33442	46.5	37.5	16.0
Others	3736	54.3	29.6	16.1
Total	209110	56.6	34.1	9.1
EAST ASIA				
China (Main)	34100	57.2	27.3	15.5
China (Taiwan)	18179	40.9	36.8	20.3

TABLE 12.6

CLASSIFICATION OF FOREIGN TOURISTS ACCORDING TO GENDER - 2004

Country of Nationality	Arrivals in number	Proportion to the total (%)		
		Male	Female	Not reported
Japan	96851	55.2	26.9	17.9
Korea(South)	47835	55.5	27.7	16.8
Others	4662	53.7	36.3	10.0
Total	201627	54.4	28.4	17.2
AUTRALASIA				
Australia	81608	53.0	35.0	12.0
New Zealand	16762	51.0	35.6	13.4
Others	2574	61.5	39.5	9.0
Total	100944	52.7	35.2	12.1
Others	14471	47.0	32.7	20.3
Stateless	1434	61.4	45.4	3.2
Grand Total	3457477	54.9	33.9	11.2

Source: Bureau of Immigration

TABLE-12.7
CLASSIFICATION OF FOREIGN TOURISTS ACCORDING
TO MODE OF TRAVEL TO INDIA-2004

Country of Nationality	Arrivals (In number)	Proportion to the total (%)		
		Air	Sea	Land
NORTH AMERICA				
Canada	135884	98.7	0.7	0.6
U.S.A.	526120	98.9	0.6	0.5
Others	0	0.0	0	0
Total	662004	98.8	0.6	0.6
CENTRAL AND SOUTH AMERICA				
Brazil	7397	98.6	0.4	1.0
Mexico	4570	97.6	1.3	1.1
Others	16198	98.1	0.3	1.6
Total	28165	98.2	0.4	1.4
WESTERN EUROPE				
Austria	21093	98.5	0.3	1.2
Belgium	24007	98.7	0.1	1.2
Denmark	16805	98.2	0.4	1.4
Finland	12525	98.9	0.1	1.0
France	131824	98.8	0.2	1.0
Germany	116879	98.1	2.4	1.6
Greece	4468	95.5	2.9	1.6
Ireland	8996	97.1	0.6	2.3

TABLE-12.7
CLASSIFICATION OF FOREIGN TOURISTS ACCORDING
TO MODE OF TRAVEL TO INDIA-2004

Country of Nationality	Arrivals (In number)	Proportion to the total (%)		
		Air	Sea	Land
Italy	65561	99.0	0.1	0.9
Netherlands	51211	97.4	0.3	2.3
Norway	10631	97.5	1.3	1.2
Portugal	10648	99.4	0.1	0.5
Spain	42895	99.0	0.1	0.9
Sweden	26154	98.6	0.2	1.2
Switzerland	28260	98.4	0.3	1.3
U.K.	555907	98.6	0.7	0.7
Others	1633	98.6	0.4	1.0
Total	1128297	98.3	0.7	1.0
EASTERN EUROPE				
Czechoslovakia	4114	94.3	0.0	5.7
Poland	6445	93.3	1.3	5.4
C.I.S.	61187	94.1	4.9	1.0
Others	9680	93.0	4.5	2.5
Total	82426	95.5	2.6	1.9
AFRICA				
Egypt	3781	98.5	1.4	0.1
Kenya	17538	99.2	0.1	0.7

TABLE-12.7
CLASSIFICATION OF FOREIGN TOURISTS ACCORDING
TO MODE OF TRAVEL TO INDIA-2004

Country of Nationality	Arrivals (In number)	Proportion to the total (%)		
		Air	Sea	Land
Mauritius	18823	99.3	0.0	0.7
Nigeria	6659	98.7	0.2	1.1
South Africa	32148	98.7	0.2	1.1
Tanzania	9953	99.7	0.2	0.1
Others	25591	99.2	0.3	0.5
Total	115493	99.0	0.2	0.8
WEST ASIA				
Bahrain	4414	99.7	0.3	0.0
Israel	39083	94.4	0.0	5.6
Oman	14927	99.9	0.0	0.1
Saudi Arabia	11929	99.4	0.0	0.6
Turkey	7008	98.0	2.2	2.8
U.A.E.	22668	99.9	0.0	0.1
Yemen Arab Rep.	8826	99.7	0.1	0.2
Others	13953	99.2	0.6	0.2
Total	122808	97.7	0.2	2.1
SOUTH ASIA				
Afghanistan	12705	100.0	0.0	0.0
Iran	24733	98.8	0.4	0.8

TABLE-12.7
CLASSIFICATION OF FOREIGN TOURISTS ACCORDING
TO MODE OF TRAVEL TO INDIA-2004

Country of Nationality	Arrivals (In number)	Proportion to the total (%)		
		Air	Sea	Land
Maldives	21099	99.7	0.1	0.2
Nepal	51534	97.9	0.0	2.1
Pakistan	67416	40.4	0.1	59.5
Bangladesh	477446	10.4	0.0	89.6
Sri Lanka	128711	99.3	0.1	0.6
Bhutan	7054	93.7	0.0	6.3
Total	790698	42.3	0.1	57.6
SOUTH EAST ASIA				
Indonesia	11408	97.7	1.0	1.3
Malaysia	84390	99.5	0.1	0.4
Myanmar	4932	95.7	1.3	3.0
Philippines	10492	92.7	6.8	0.5
Singapore	60710	99.5	0.2	0.3
Thailand	33442	96.3	0.5	3.2
Others	3736	96.2	0.2	3.8
Total	209110	98.4	0.6	1.0
EAST ASIA				
China(Main)	34100	97.5	0.6	1.9
China(Taiwan)	18179	98.6	0.0	1.4

TABLE-12.7
CLASSIFICATION OF FOREIGN TOURISTS ACCORDING
TO MODE OF TRAVEL TO INDIA-2004

Country of Nationality	Arrivals (In number)	Proportion to the total (%)		
		Air	Sea	Land
Japan	96851	95.9	1.4	2.7
Korea(South)	47835	96.4	0.1	3.5
Others	4662	97.4	0.0	2.6
Total	201627	96.6	0.8	2.6
AUTRALASIA				
Australia	81608	97.7	0.8	1.5
New Zealand	16762	97.6	0.7	1.7
Others	2574	98.4	0.1	1.5
Total	100944	97.7	0.8	1.5
Others	14471	99.1	0.2	0.7
Stateless	1434	99.2	0.0	0.6
Grand Total	3457477	85.6	0.5	13.9

Source : Bureau of Immigration

TABLE - 12.8

**CLASSIFICATION OF FOREIGN TOURISTS ACCORDING TO
PORT OF DISEMBARKATION - 2004**

Country of Nationality	Arrivals (in number)	Proportion to the total (%)				
		Mumbai	Kolkata	Chennai	Delhi	Others
NORTH AMERICA						
Canada	135884	20.1	2.2	6.3	62.5	9.1
U.S.A.	526120	35.7	2.8	8.4	31.9	21.0
Others	0	0	0	0	0	0
Total	662004	32.8	2.7	8.0	38.2	18.8
CENTRAL AND SOUTH AMERICA						
Brazil	7397	43.9	1.6	5.2	41.9	7.3
Mexico	4570	22.0	3.0	3.0	59.2	12.8
Others	18198	25.2	1.5	5.2	47.9	20.2
Total	28165	29.4	1.8	4.8	48.1	15.9
WESTERN EUROPE						
Austria	21093	14.2	1.8	6.1	57.2	20.7
Belgium	24007	29.5	2.5	9.2	47.7	11.1
Denmark	15805	23.1	2.0	10.9	50.3	13.7
Finland	12525	21.1	2.1	5.5	37.1	34.2
France	131824	21.2	1.5	21.6	47.7	8.0
Germany	118679	28.4	2.9	8.1	45.8	15.0
Greece	4468	28.8	2.3	6.1	46.4	16.6
Ireland	8996	30.1	7.2	6.2	31.3	25.2

TABLE - 12.8

**CLASSIFICATION OF FOREIGN TOURISTS ACCORDING TO
PORT OF DISEMBARKATION - 2004**

Country of Nationality	Arrivals (In number)	Proportion to the total (%)				
		Mumbai	Kolkata	Chennai	Delhi	Others
Italy	65561	26.7	2.3	9.3	47.9	13.8
Netherlands	51211	27.6	2.1	7.9	52.1	10.3
Norway	10631	25.1	2.6	11.4	51.1	9.8
Portugal	10648	60.2	0.8	2.6	24.4	12.0
Spain	42895	17.8	4.1	5.9	63.1	9.1
Sweden	26154	28.5	3.5	7.8	39.2	21.0
Switzerland	28260	30.2	1.9	7.8	39.2	20.9
U.K.	555907	34.3	2.5	4.8	30.7	27.7
Others	1633	23.0	3.7	13.1	41.4	18.8
Total	1128297	29.6	2.4	8.3	39.7	20.0
EASTERN EUROPE						
Czechoslovakia	4114	27.3	1.6	5.9	49.8	15.4
Poland	8445	20.5	2.3	4.4	58.0	14.8
C.I.S.	81187	6.2	0.8	1.3	67.5	24.2
Others	8680	22.3	2.1	4.9	59.4	11.3
Total	82426	16.3	0.8	2.2	57.1	23.8
AFRICA						
Egypt	3781	48.3	0.2	3.7	39.6	8.2
Kenya	17538	86.0	0.1	1.6	9.9	2.4

TABLE - 12.8

**CLASSIFICATION OF FOREIGN TOURISTS ACCORDING TO
PORT OF DISEMBARKATION - 2004**

Country of Nationality	Arrivals (In number)	Proportion to the total (%)				
		Mumbai	Kolkata	Chennai	Delhi	Others
Mauritius	19823	52.4	0.2	18.9	29.1	1.4
Nigeria	6659	73.7	0.9	1.8	20.9	2.9
South Africa	32148	78.5	0.5	5.8	11.3	3.9
Tanzania	9953	84.5	0.1	2.9	6.1	6.4
Others	25591	53.2	0.7	4.7	30.1	11.3
Total	115493	68.9	0.4	6.3	19.3	5.1
WEST ASIA						
Bahrain	4414	64.7	0.3	3.9	8.5	22.6
Israel	39083	49.9	0.9	0.9	39.4	8.9
Oman	14927	51.4	0.1	19.1	5.2	24.2
Saudi Arabia	11929	57.1	0.3	4.2	23.7	14.7
Turkey	7008	17.9	0.9	2.4	66.4	12.4
U.A.E.	22668	53.8	0.1	1.2	3.3	41.6
Yemen Arab Rep.	8826	64.8	0.1	0.6	4.4	10.1
Others	13953	44.7	1.2	4.2	31.0	18.9
Total	122808	52.1	0.6	4.0	24.1	19.2
SOUTH ASIA						
Afghanistan	12705	2.3	0.2	0.1	96.7	0.7
Iran	24733	49.9	0.1	1.6	37.3	11.1

TABLE - 12.8

**CLASSIFICATION OF FOREIGN TOURISTS ACCORDING TO
PORT OF DISEMBARKATION - 2004**

Country of Nationality	Arrivals (in number)	Proportion to the total (%)				
		Mumbai	Kolkata	Chennai	Delhi	Others
Maldives	21099	0.9	0.1	5.6	3.7	89.7
Nepal	51534	7.9	6.2	0.5	75.9	9.5
Pakistan	67416	20.6	0.1	0.3	19.3	59.7
Bangladesh	477446	0.4	7.7	0.1	1.3	90.5
Sri Lanka	128711	3.9	0.2	65.1	4.2	26.6
Bhutan	7054	0.7	44.5	0.9	46.7	7.2
Total	790698	4.8	5.4	11.6	11.5	66.7
SOUTH EAST ASIA						
Indonesia	11409	36.6	2.8	10.9	32.9	16.8
Malaysia	84390	10.4	1.9	53.8	19.2	14.7
Myanmar	4932	5.9	59.8	7.7	20.9	5.7
Philippines	10492	37.8	2.7	11.1	28.6	19.6
Singapore	60710	19.6	3.3	35.1	21.9	20.1
Thailand	33442	13.9	15.1	7.9	49.4	13.7
Others	3736	19.1	5.9	9.5	49.9	15.6
Total	209110	16.5	5.8	35.2	26.2	16.3
EAST ASIA						
China (Main)	34100	21.5	4.9	7.0	53.7	12.9
China (Taiwan)	18179	11.8	3.0	4.1	75.7	5.4

TABLE - 12.8

**CLASSIFICATION OF FOREIGN TOURISTS ACCORDING TO
PORT OF DISEMBARKATION - 2004**

Country of Nationality	Arrivals (in number)	Proportion to the total (%)				
		Mumbai	Kolkata	Chennai	Delhi	Others
Japan	96851	17.1	6.2	6.4	57.8	12.5
Korea(South)	47835	24.8	5.1	12.3	47.3	10.5
Others	4662	14.5	0.9	7.8	54.8	22.0
Total	201627	18.1	5.3	7.7	56.1	11.8
AUTRALASIA						
Australia	61608	31.6	4.8	12.4	34.0	17.2
New Zealand	16762	33.4	4.5	8.6	37.9	15.6
Others	2574	49.1	1.0	7.9	32.3	9.7
Total	100944	32.3	4.7	11.6	34.6	16.8
Others	14471	31.6	0.9	5.4	58.1	4.0
Stateless	1434	12.8	0.1	17.2	6.6	6.1
Grand Total	3457477	25.1	3.3	10.3	32.2	29.1

Source: Bureau of Immigration

TABLE - 12.9

**CLASSIFICATION OF FOREIGN TOURISTS ACCORDING TO
PURPOSE OF VISIT 2004**

Country of Nationality	Arrivals (in number)	Proportion to the total (%)			
		Business	Conference	Education and Employment	Tourism and Others
NORTH AMERICA					
Canada	135664	1.5	0.1	0.5	97.9
U.S.A	528120	2.6	0.2	0.4	96.8
Others	0	0.0	0.0	0.0	0.0
Total	662004	2.4	0.2	0.4	97.0
CENTRAL AND SOUTH AMERICA					
Brazil	7397	2.7	0.5	0.4	96.4
Mexico	4570	2.2	0.3	0.5	97.0
Others	18198	2.4	0.7	0.6	96.3
Total	28165	2.5	0.6	0.5	96.4
WESTERN EUROPE					
Austria	21093	2.5	0.2	0.4	96.8
Belgium	24007	2.7	0.2	0.4	96.8
Denmark	15605	4.5	0.6	0.4	94.5
Finland	12525	4.8	0.5	0.7	94.0
France	131824	2.2	0.1	0.3	97.4
Germany	116679	4.5	0.2	0.4	94.9
Greece	4468	3.4	0.3	0.4	95.9
Ireland	8996	4.6	0.2	0.4	94.7

TABLE - 12.9

**CLASSIFICATION OF FOREIGN TOURISTS ACCORDING TO
PURPOSE OF VISIT 2004**

Country of Nationality	Arrivals (In number)	Proportion to the total (%)			
		Business	Conference	Education and Employment	Tourism and Others
Italy	65561	2.6	0.2	0.3	97.0
Netherlands	51211	3.0	0.2	0.2	96.6
Norway	10631	2.7	0.5	0.4	96.4
Portugal	10648	1.3	0.2	0.2	98.5
Spain	42895	1.7	0.1	0.2	98.0
Sweden	26154	4.4	0.4	0.4	94.6
Switzerland	28260	2.3	0.2	0.4	97.1
U.K.	555907	1.9	0.1	0.3	97.6
Others	1633	2.2	0.2	0.8	96.7
Total	1128297	2.5	0.2	0.3	97.1
EASTERN EUROPE					
Czechoslovakia	4114	3.4	0.1	0.1	96.3
Poland	8445	3.8	0.4	0.3	95.7
C.I.S.	61187	3.9	0.4	0.7	95.0
Others	8680	6.4	1.4	0.9	91.3
Total	82426	3.7	0.4	0.6	95.3
AFRICA					
Egypt	3781	3.9	0.8	0.5	95.0

TABLE - 12.9

**CLASSIFICATION OF FOREIGN TOURISTS ACCORDING TO
PURPOSE OF VISIT 2004**

Country of Nationality	Arrivals (In number)	Proportion to the total (%)			
		Business	Conference	Education and Employment	Tourism and Others
Kenya	17538	0.9	0.1	0.2	98.7
Mauritius	19823	0.4	0.1	0.2	99.3
Nigeria	6659	2.5	0.5	0.5	96.5
South Africa	32148	0.8	0.1	0.1	98.9
Tanzania	9953	0.6	0.1	0.3	99.0
Others	25591	2.3	0.6	0.9	96.2
Total	115493	1.3	0.2	0.4	98.1
WEST ASIA					
Bahrain	4414	1.3	0.5	0.4	97.9
Israel	39083	1.4	0.1	0.2	98.3
Oman	14927	0.8	0.2	0.5	98.6
Saudi Arabia	11929	1.9	0.4	0.4	97.3
Turkey	7008	6.1	0.5	0.4	92.8
U.A.E.	22668	0.4	0.1	0.3	99.2
Yemen Arab Rep.	6826	0.7	0.1	0.5	98.7
Others	13953	3.9	0.5	0.7	94.9
Total	122808	1.7	0.2	0.4	97.7
SOUTH ASIA					
Afghanistan	12705	1.3	0.3	0.4	98.0

TABLE - 12.9

**CLASSIFICATION OF FOREIGN TOURISTS ACCORDING TO
PURPOSE OF VISIT 2004**

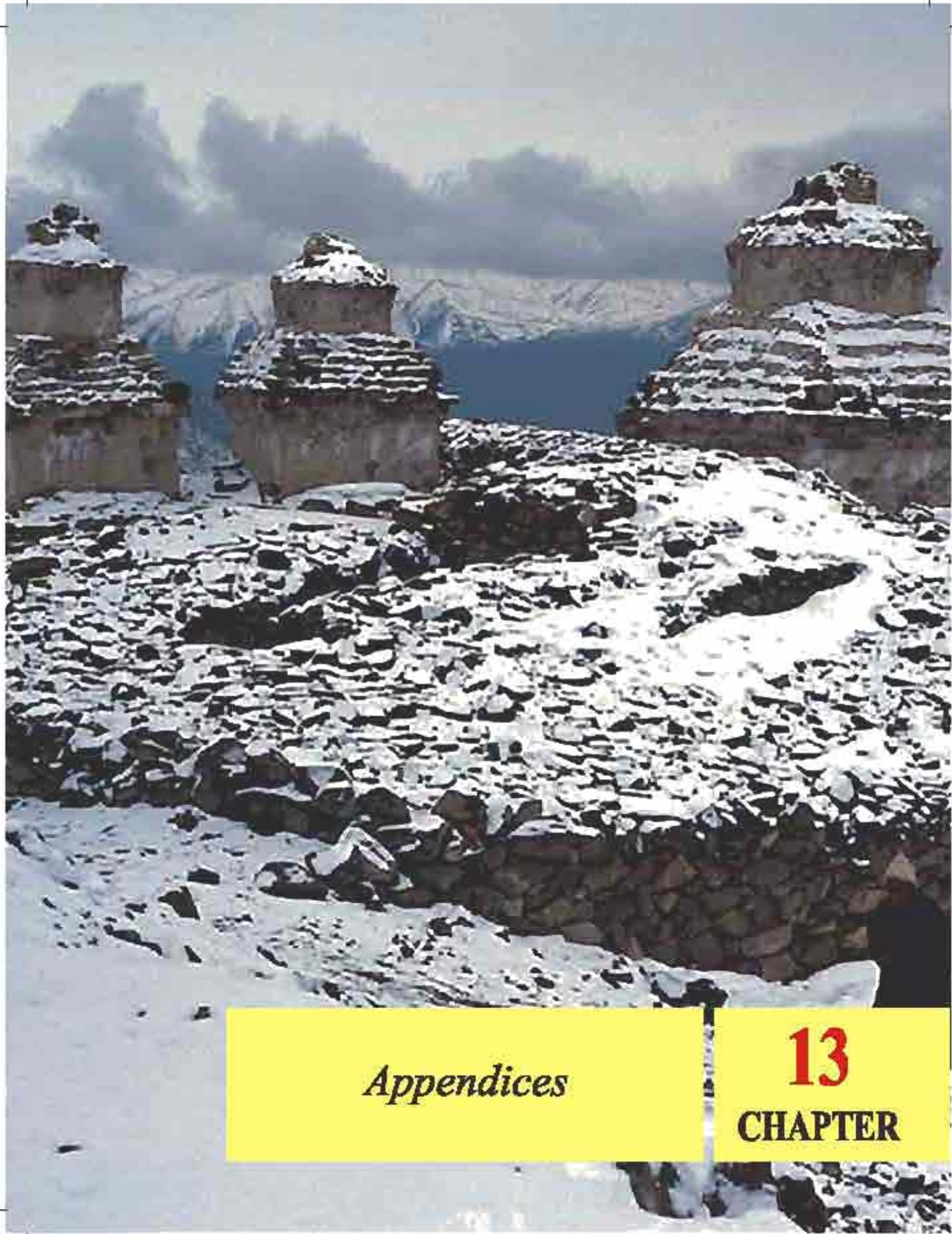
Country of Nationality	Arrivals (In number)	Proportion to the total (%)			
		Business	Conference	Education and Employment	Tourism and Others
Iran	24733	1.8	0.8	0.7	96.8
Maldives	21099	0.3	0.1	0.2	99.4
Nepal	51534	1.8	0.7	0.8	96.9
Pakistan	67418	1.4	0.9	0.1	97.7
Bangladesh	477446	1.2	0.2	0.2	98.6
Sri Lanka	128711	1.2	0.3	0.3	98.3
Bhutan	7054	1.4	0.6	1.0	97.1
Total	790698	1.2	0.3	0.3	98.2
SOUTH EAST ASIA					
Indonesia	11408	3.1	1.7	0.6	94.8
Malaysia	84390	1.9	0.3	0.6	97.2
Myanmar	4932	2.6	0.6	0.9	96.0
Philippines	10482	4.5	1.2	1.0	93.4
Singapore	60710	4.3	0.3	0.3	95.1
Thailand	33442	2.8	0.7	1.2	95.5
Others	9736	2.4	2.2	1.2	94.2
Total	209110	2.9	0.6	0.6	95.9
EAST ASIA					
China (Main)	34100	9.3	0.9	0.4	89.5
China (Taiwan)	18179	3.7	0.4	0.4	95.6

TABLE - 12.9

**CLASSIFICATION OF FOREIGN TOURISTS ACCORDING TO
PURPOSE OF VISIT 2004**

Country of Nationality	Arrivals (In number)	Proportion to the total (%)			
		Business	Conference	Education and Employment	Tourism and Others
Japan	98851	5.1	0.3	0.8	93.8
Korea(South)	47835	4.0	0.4	0.4	95.2
Others	4882	3.1	0.6	1.2	95.1
Total	201627	5.4	0.4	0.8	93.8
AUTRALASIA					
Australia	81608	3.2	0.3	0.4	96.1
New Zealand	16762	2.4	0.2	0.4	96.9
Others	2574	0.8	0.6	0.4	98.0
Total	100944	3.0	0.3	0.4	96.3
Others	14471	2.3	0.7	0.7	96.4
Stateless	1434	1.1	0.3	0.8	97.9
Grand Total	3467477	2.3	0.2	0.4	97.0

Source : Bureau of Immigration



Appendices

13
CHAPTER

**GENERAL TERMS, CONDITIONS & APPLICATION
FORMAT FOR PROJECT APPROVAL AT PROJECT LEVEL
& CLASSIFICATION OF HOTELS**

Hotels are an integral part of a tourist's visit to a place and the services offered by them can make or mar a visit completely. With the aim of providing standardized, world class services to the tourists, the Government of India, Department of Tourism has a voluntary scheme for classification of fully operational hotels in the following categories:-

1. Star Hotels:- 5 Star Deluxe, 5 Star, 4 Star, 3 Star, 2 Star & 1 Star
2. Heritage Hotels:- Heritage Grand, Heritage Classic & Heritage

The Hotel & Restaurant Approval & Classification Committee (HRACC) inspects and assesses the hotels based on facilities and services offered.

Project approvals are also given in all the above-mentioned categories at the project implementation stage.

Classified hotels/approved projects are eligible for various concessions and facilities that are announced by the Government from time to time besides, getting worldwide publicity through the Indiatourism Offices located in India and abroad.

Details of the criteria set and the documents required are given in this document

For classification and project approvals in the 5 Star Deluxe, 5 Star, 4 Star and all the three Heritage categories the applications along with the requisite fees may be sent to:-

Member Secretary (HRACC)/Hotel and Restaurants Division,
Department of Tourism, Government of India,
C-1 Hutments, Dalhousie Road, New Delhi 110011.

For classifications and project approvals in the 3 Star, 2 Star and 1 Star categories the applications along with the requisite fees maybe sent to the Regional Director, Indiatourism Office in whose region the hotel/project is located:

- | | |
|---|---|
| 1. Regional Director,
Indiatourism,
West & Central Region
121, M. Karve Road
Mumbai 400 020 | 2. Regional Director,
Indiatourism
Northern Region
88, Janpath
New Delhi 110001 |
|---|---|

- | | |
|--|--|
| <p>3. Regional Director,
Indiatourism,
Southern Region
154,Anna Salai
Chennai 600002</p> | <p>4. Regional Director,
Indiatourism
Eastern Region
Embassy, 4, Shakespeare Sarani
Kolkata 700007</p> |
| <p>5. Regional Director,
Indiatourism
North Eastern Region
G.L.Publication Complex
G.S.Road, Guwahati-781007</p> | |

Approval at Project Level

1. The Department of Tourism approves hotels at project stage based on documentation, which enables the hotels to get certain benefits from the govt. as announced from time to time. The documents required for project approvals are listed below.
2. Project approvals are valid for 5 years. Project approvals of the Govt. of India, Department of Tourism cease 3 months from the date that the hotel becomes operational even if all its rooms are not ready. The hotel must apply for classification within these 3 months.
3. The Department of Tourism, Govt. India reserves the right to modify the guidelines/terms and conditions from time to time
4. Application form. This covers
 - i. Proposed name of the hotel
 - ii. Name of the promoters with a note on their business antecedents
 - iii. Complete postal address of the promoters/tel./fax/email
 - iv. Status of the owners/promoters
 1. If Public/private limited company with copies of Memorandum and Articles of Association
 2. If Partnership, a copy of partnership deed and certificate of registration
 3. If proprietary concern, name and address of proprietor/certificate of registration
 - v. Location of hotel site with postal address
 - vi. Details of the site
 1. Area (in sq. meters)

2. Title – owned/leased with copies of sale/lease deed
 3. Copy of Land Use Permit from local authorities
 4. Distances from Railway station, airport, main shopping centers (in Kms)
- vii. Details of the project
1. Copy of feasibility report.
 2. Star category planned
 3. Number of rooms and area for each type of room (in sq.ft.)
 4. Number of attached baths and areas (in sq.ft.)
 5. Details of public areas – Lobby/lounge, restaurants, bars, shopping, banquet/conference halls, health club, swimming pool, parking facilities.
 6. Facilities for the physically challenged persons.
 7. Eco-friendly practices and any other additional facilities (please indicate area in sq.ft for each facility mentioned above at 5, 6 & 7)
 8. Date by which project is expected to be completed and operational.
- viii. Blue prints/sketch plans signed by owners and architect showing
1. Site plan
 2. Front and side elevations
 3. Floor plans for all floors
 4. Detail of guest room and bath room with dimensions in sq.ft.
 5. Details of Fire Fighting Measures/ Hydrants etc.
 6. Details of measures for energy conservation and water harvesting.
- ix. Air-conditioning details for guest rooms, public areas
- x. Local approvals by
1. Municipal authorities
 2. Concerned Police Authorities
 3. Any other local authority as maybe required.
 4. Approval/NOC from Airport Authority of India for projects located near Airports

The above mentioned approvals/NOCs are the responsibility of the promoters/ concerned company as the case may be. The Department's approval is no substitute for any statutory approval and the approval given is liable to be withdrawn in case of any violations without notice.

- xi. Proposed capital structure
1. Total project cost

- a. Equity component with details of paid up capital
 - b. Debt – with current and proposed sources of funding
- xii. Letter of acceptance of regulatory conditions.
 - xiii. Please indicate whether the promoter intends to give a few rooms or all rooms on a time-share basis.
 - xiv. Application Fee
5. In the event of any changes in the project plans, the approval must be sought afresh.
 6. Authorised officers of the Department of Tourism should be allowed free access to inspect the premises from time to time without prior notice
 7. The hotel must immediately inform the Department of the date from which the hotel becomes operational and apply for classification within 3 months of this date.
 8. The fees payable for the project approval and subsequent extension, if required are as follows. The demand draft maybe payable to” Pay & Accounts Officer, Department of Tourism, New Delhi “.

Star Category	Amount in Rs.
5 - Star	15,000
4 - Star	12,000
3 - Star	8,000
2 - Star	6,000
1 - Star	5,000
Heritage Category	12,000

9. The promoters must forward regular progress reports for each quarter failing which the project approval would be considered withdrawn.
10. All documents must be valid at the time of application and a Gazetted officer or Notary must duly certify copies furnished to the Department. Documents in local languages should be accompanied by a translation in English/official language and be duly certified.
11. Projects, where it is proposed to let out part or whole of the hotel on time share basis will not be eligible for approval.
12. For any change in the category the promoters must apply afresh with a fresh application form and requisite fees for the category applied for.

13. Any changes in the project plans or management should be informed to the, Department of Tourism/Regional Directors Office (For 3, 2 & 1 Star categories) (for 5-D, 5, 4 Star and Heritage categories) within 30 days otherwise the approval will stand withdrawn/terminated.
14. Applicants are requested to go through the checklist of facilities & services contained in this document before applying.
15. Incomplete applications will not be accepted.
16. The Govt. of India, Ministry of Tourism reserves the right to modify the guidelines/ terms and conditions from time to time.

HOTEL CLASSIFICATION/RECLASSIFICATION

1. Classification for newly operational hotels must be sought within 3 months of completion of approved hotel projects. Operating hotels may opt for classification at any stage. However, hotels seeking re-classification should apply for reclassification one year prior to the expiry of the current period of classification.
2. If the hotel fails to reapply 1 year before the expiry of the classification order, the application will be treated as a fresh classification case.
3. Once a hotel applies for classification/ re-classification, it should be ready at all times for inspection by the HRACC. No requests for deferment of inspection will be entertained.
4. Classification will be valid for 5 (Five) years from the date of issue of orders or in case of reclassification from the date of expiry of the last classification provided that the application has been received within the stipulated time mentioned above, along with all valid documents. Incomplete applications will not be accepted.
5. Hotels which propose to let out part of or all its rooms on time-share basis are not eligible to be classified
6. Hotels applying for classification must provide the following documentation.
 - a. Application Form detailing
 - i. Name of the hotel
 - ii. Name and address of the promoters/owners with a note on their business antecedents
 - iii. Complete postal address of the hotel with tel. no/fax/email
 - iv. Status of the owners/promoters
 1. If Public/private limited company with copies of Memorandum and Articles of Association
 2. If Partnership, a copy of partnership deed and certificate of registration
 3. If proprietary concern, name and address of proprietor/certificate of registration.
 - v. Date on which the hotel became operational.
 - vi. Details of hotel site with postal address and distance from Airport/Railway Station/City Centre/Downtown shopping area (in kms)
 - vii. Details of the hotel

1. Area (in sq. metres) with title – owned/leased with copies of sale/ lease deed
 2. Copy of Land Use Permit from local authorities
 3. Star category being applied for
 4. Number of rooms and area for each type of room in sq.ft. (single/ double/suites)
 5. Number of attached baths
 6. Details of public areas – Lobby/lounge, restaurants, bars, shopping area, banquet/conference halls, health club, swimming pool, parking facilities, facilities for the physically challenged persons, Eco-friendly practices and any other additional facilities. The area for each facility should be indicated in sq.ft
 7. Detail of guestroom and bathroom with dimensions in sq.ft.
 8. Details of Fire Fighting Measures/Hydrants etc.
 9. Details of measures for energy conservation and water harvesting and other Eco- friendly measures and initiatives.
 10. Air-conditioning details for guest rooms, public areas
- viii. Certificates/No Objection Certificate's (attested copies)
- a) Certificate/licence from Municipality/Corporation to show that your establishment is registered as a hotel
 - b) Certificate/licence from concerned Police Department authorizing the running of a hotel
 - c) Clearance Certificate from Municipal Health Officer/Sanitary Inspector giving clearance to your establishment from sanitary/ hygienic point of view
 - d) No Objection Certificate with respect to fire fighting arrangements from the Fire Service Department (Local Fire Brigade Authorities)
 - e) Public liability insurance
 - f) Bar Licence (necessary for 4* , 5* & 5*-D only)
 - g) Money Changers Licence (necessary for 4*,5*& 5*-D only)
 - h) Sanctioned building plans/occupancy certificate
 - i) If classified earlier, a copy of the earlier "Certificate of Classification issued by Department of Tourism
 - j) For Heritage property, certificate from the local authority stating age of the property and showing new and old built up areas separately.
 - k) Any other local authority as maybe required.
 - l) Approval /NOC from AAI for projects located near Airports

- m) Please indicate whether a few rooms or all rooms are to be let out on a time-share basis.
- n) Application fees

The above-mentioned approvals/No Objection Certificates are the responsibility of the Owners/promoters/concerned Company as the case may be. The Department's approval is no substitute for any statutory approval and the approval given is liable to be withdrawn without notice in case of any violations or misrepresentation of facts.

7. All applications for classification or re-classification must be complete in all respects – application form, application fee, prescribed clearances, NOCs, certificates etc. - incomplete application is liable to be rejected.
8. Hotels will qualify for classification as Heritage hotels provided a minimum 50% of the floor area was built before 1935 and no substantial change has been made in the facade. Hotels, which have been classified/, re-classified under Heritage categories prior to issue of these Guidelines will continue under Heritage categories even if they were built between 1935-1950.
9. The application fees payable for classification/reclassification are as follows. The demand draft maybe payable to "Pay & Accounts Officer, Department of Tourism, New Delhi".

Star Category	Classification/Reclassification fees in Rs.
1-Star	6,000
2-Star	8,000
3-Star	10,000
4-Star	15,000
5- Star	20,000
5-Star Deluxe	25,000
Heritage (Grand, Classic & Heritage categories)	15,000

10. The classification committee will consist as follows
 - (a.) For 4*, 5* and 5* Deluxe and Heritage category - Chaired by Chairman (HRACC) or his representative. Representatives from FHRAI/ HAI/ IATO/ TAAI/ IHM /RD/ local Indiatourism office/Director(T) of the concerned State Govt. or his representative(who should be a Gazetted officer) /Member Secretary will constitute the other members of the Committee. In case of Heritage category, a representative of IHHA will be a member of the committee.

- (b.) For 1*, 2* & 3*, the committee will be Chaired by Secretary (T) of the concerned State Govt. or his nominee who should not be below the rank of a Deputy Secretary to the Government of India. In his absence the Regional Director, Indiatourism who is also Member Secretary, Regional HRACC will chair the committee. The recommendations will be sent to HRACC Division (Department of Tourism, Government of India) within 3 weeks. Other members will be representatives from FHRAI/ IATO/ TAAI/ IHM.
 - (c.) The Chairman and any 3 members will constitute a quorum
 - (d.) The minutes will be approved by the Chairman (HRACC).
 - (e.) In case of any dissatisfaction with the decision of HRACC the hotels may appeal to Secretary (T), Government of India for review and reconsideration within 30 days of receiving the communication regarding classification/reclassification. No requests will be entertained beyond this period.
11. Hotels will be classified following a two stage procedure
 - a. The presence of facilities and services will be evaluated against the enclosed checklist.
 - i. New projects will be required to adopt environment friendly practices and facilities for physically challenged persons.
 - ii. Existing hotels being classified will need to conform to a phased plan for adding Eco-friendly practices and facilities for physically challenged persons, which should be completed by 31st December, 2003.
 - b. The quality of facilities and services will be evaluated against the mark sheet
 12. The hotel is expected to maintain required standards at all times. The Classification Committee may inspect a hotel at any time without previous notice. The Committee may request that its members be accommodated overnight to inspect the level of services.
 13. Any deficiencies/rectification pointed out by the HRACC must be complied with within the stipulated time, which has been allotted in consultation with the hotel representatives during inspection. Failure to do so will result in rejection of the application.
 14. The committee may assign a star category lower but not higher than that applied for.
 15. The hotel must be able to convince the committee that they are taking sufficient steps to conserve energy and harvest water, garbage segregation, and disposal/ recycling as per Pollution Control Board (PCB) norms and following other Eco-friendly measures.

16. For any change in the star category/heritage category the promoters must apply afresh with a fresh application form and requisite fees for the category applied for.
17. Any changes in the plans or management of the hotel should be informed to the HRACC, Govt. of India, Department of Tourism within 30 days otherwise the classification will stand withdrawn/terminated.
18. Applicants are requested to go through the checklist of facilities and services contained in this document before applying.
19. Incomplete applications will not be considered. All cases of classification would be finalised within three months of the application being made.
20. The Govt. India Department of Tourism reserves the right to modify the guidelines/ terms and conditions from time to time

Format for Undertaking

To,
The Secretary (T)
Govt. of India,
Department of Tourism
New Delhi.

UNDERTAKING

I have read and understood all the terms and conditions mentioned above with respect to project approval/classification/reclassification in 1/2/3/4/5/5-D/Heritage category and hereby agree to abide by them. The information and documents provided are correct and authentic to the best of my knowledge.

Signature and name in block letters
Seal of the applicant

Place:
Date:

CHECKLIST FOR FACILITIES & SERVICES	1*	2*	3*	4*	5*/5'D	Yes/No	Comments
General							
Primarily transient, full time operations, 7days a week in season	N	N	N	N	N		Max 10% of rooms for commercial use in hotel block or as per local law. At least one room equipped for the physically challenged
Establishment to have all necessary trading licences	N	N	N	N	N		These documents are already detailed in General Terms and Conditions
Establishment to have public liability insurance	D	D	D	D	D		
24 hrs. lifts for buildings higher than ground plus two floors	N	N	N	N	N		Mandatory for new hotels. Local laws may require a relaxation of this condition.Easy access for physically challenged persons.
Bedrooms, Bathrooms, Public areas and kitchens fully serviced daily	N	N	N	N	N		
All floor surfaces clean and in good repair	N	N	N	N	N		Floors may be of any type
Guest rooms							
Minimum 10 lettable rooms. All rooms with outside window/ventilation	N	N	N	N	N		
Minimum size of bedroom excluding bathroom in sq.ft.	120	120	140	140	200		Single occupancy rooms may be 20 sq ft less
Airconditioning	25%	25%	50%	100%	100%		Airconditioning/ heating depends on climatic conditions & architecture. Room temp should be between 20 & 28 Degrees C. For 4*, 5* and 5* Deluxe .(the % is of the total no. of rooms)
A clean change of bed and bath linen daily & between check-in's	N	N	N	N	N		Hotels may have a guest triggered system.For 1* & 2* on alternate days.Definitely required between each check-in.
Minimum bed width for single (90cm) and double beds (135cm)	D	N	N	N	N		
Mattress Minimum 10cm thick	D	D	N	N	N		Coir, Foam or spring. Foam covered if cotton
Minimum bedding 2 sheets, pillow & case, blanket, mattress protector/ bed cover.	N	N	N	N	N		Blankets available in airconditioned rooms and as per Seasonal requirement in non AC rooms. Mattress protector is desirable in 1* and 2* and necessary for all others

CHECKLIST FOR FACILITIES & SERVICES	1*	2*	3*	4*	5*/5'D	Yes/No	Comments
Sufficient lighting. 1 per bed	N	N	N	N	N		
A 5 amp earthed power socket	N	N	N	N	N		
A bedside table and drawer	N	N	N	N	N		1 per two twins and two for a double bed
TV with remoter - cable if available			N	N	N		
A writing surface with sufficient lighting			N	N	N		
Chairs	N	N	N	N	N		Preferable one per bedding
Ward robe with minimum 4 clothes hangers per bedding	N	N	N	N	N		11h & 2*these may be without doors
Shelves or drawer space	N	N	N	N	N		
A wastepaper basket	N	N	N	N	N		
Opaque curtains or screening at all windows	N	N	N	N	N		
Drinking water + 1 glass tumbler per guest	N	N	N	N	N		Water treated with UV + filtration is necessary
A mirror, at least half length (3')	N	N	N	N	N		
A stationary folder containing stationery and envelopes	D	D	N	N	N		
A 'do not disturb' notice			N	N	N		
Night spread/ bedcover with nightly turndown service			N	N	N		
In room safe					N		
Minibar/Fridge					N		Contents must conform to local laws
Iron and ironing board on request				N	N		
Suites				N	N		2% of room block with a minimum of 1
Bathrooms							
Percentage of rooms with dedicated (private) bathrooms with room	25%	75%	ALL	ALL	ALL		Dedicated bathrooms need not be "attached" but must have private access
Minimum Size of Bathroom in square feet	30	30	36	36	45		25% of bathrooms in 1* & 2* to be Western style WC
Communal Bathrooms on same floor as rooms for 1* & 2*. Access not through Public areas, Kitchens etc	N	N	NA	NA	NA		All bathrooms, shower stalls lockable. Toilet area to have sanitary bin with lid

CHECKLIST FOR FACILITIES & SERVICES	1*	2*	3*	4*	5*/5*D	Yes/No	Comments
1 bath towel and 1 handtowel to be provided per guest	N	N	N	N	N		If no attached/ dedicated bath, to provide in room
One W.C. brush per toilet seat	N	N					
Guest toiletries to be provided. Minimum 1 new soap per guest	N	N	N	N	N		Where bathroom is not attached, toiletries provided in room
A clothes-hook in each bath/shower room	N	N	N	N	N		
A sanitary bin	N	N	N	N	N		In communal bathrooms, these must have a cover
Each Western WC toilet to have a seat and lid, toilet paper	N	N	N	N	N		
Floors and walls to have non-porous surfaces	N	N	N	N	N		
Hot and Cold running water available 24 hours	D	D	N	N	N		
Shower closet	N	N	N	N	N		Where bath-tubs are offered, a shower with shower curtains will suffice
Bath tubs				D	D		In 4* plus hotels, some rooms should offer this option to guests.
Water saving taps/shower					N		
Energy saving lighting	N	N	N	N	N		In Public areas
Bottled toiletry products	D	D	D	N	N		
Hairdryers	D	D	D	N	N		Where not provided in bathroom, must be available on request.
Public Areas							
A lounge or seating in the lobby area	N	N	N	N	N		Size would depend on check in pattern.
Reception facility or means to call attention	N	N	N	N	N		Manned minimum 16 hours a day. Call service 24 hours
Accommodation, F&B and other tariffs available	N	N	N	N	N		
Heating and cooling to be provided in enclosed public rooms				N	N		Temperatures to be between 20 - 28 degrees celcius
Public rest rooms for Ladies and Gents with soap and clean towels, a washbasin with running hot and cold water, a mirror, a sanitary bin with lid in unisex & ladies toilet	N	N	N	N	N		In 1* and 2* hotels, this may be unisex. (4* & above should have facility for physically challenged persons)

CHECKLIST FOR FACILITIES & SERVICES	1*	2*	3*	4*	5*/5D	Yes/No	Comments
Ramps with anti-slip floors and handrails at the entrance. Minimum door width should be 32" to allow wheelchair access and other facilities for the physically challenged	D	D	D	N	N		Wheelchair access with suitable table in atleast one restaurant.
Public restrooms to have low height urinal (24" Max)	N	N	N	N	N		
Facilities for aurally/visually handicapped	D	D	D	N	N		
Food & Beverage							
Dining Room serving Breakfast & Dinner	D	N	N	N	N		Meal times to be displayed. Service to start by 7am and finish no earlier than 11pm. Minimum one hour per meal service. Breakfast may be Continental. 1* hotel without dining room must offer service in rooms. A separate dining room is not required where there is a restaurant offering this facility.
Multi cuisine restaurant on premises	D	D	N	N	N		
Speciality restaurant			D	N	N		Maybe relaxed for 4 * hotels located at rural/ hilly areas and pilgrim centres
24 hours coffee shop			D	D	N		
Full service of all 3 meals in Dining room	D	D	N	N	N		
A cooked breakfast be available	D	N	N	N	N		
Room Service of full meals				N	N		In 1* this is necessary if no Dining room. 3* must offer light (pre-plated) meals
Room Service of alcoholic beverages				N	N		If permitted by local law
Crockery & Glassware unchipped	N	N	N	N	N		Plastic ware accepted in pool area
Cutlery to be at least stainless steel	N	N	N	N	N		Plastic ware accepted in pool area
Silverware					N		Necessary in 5* D hotels speciality restaurants only
Bar				N	N		If permitted by local laws
Kitchens							
Refrigerator with deep freeze	N	N	N	N	N		Capacity based on size of F&B service
Segregated storage of meat, fish and vegetables	N	N	N	N	N		Meats & fish in freezers. Vegetables must be separate

CHECKLIST FOR FACILITIES & SERVICES	1*	2*	3*	4*	5*/5'D	Yes/No	Comments
Tiled walls, non-slip floors	N	N	N	N	N		
Segregated storage of meat, fish and vegetables	N	N	N	N	N		Meat & Fish in freezers. Vegetables must be separate.
Head covering for production staff	N	N	N	N	N		
Daily germicidal cleaning of floors	N	N	N	N	N		
Clean utensils	N	N	N	N	N		
Six monthly medical checks for production staff	N	N	N	N	N		
All food grade equipment, containers	N	N	N	N	N		
Ventilation system	N	N	N	N	N		
First-aid training for all kitchen staff	N	N	N	N	N		
Drinking water	N	N	N	N	N		Water treated with UV + filtration is acceptable
Garbage to be segregated-wet and dry	N	N	N	N	N		To encourage recycling
Wet garbage area to be airconditioned for 3 * to 5 * Deluxe categories			N	N	N		
Receiving and stores to be clean and distinct from garbage area	N	N	N	N	N		
Staff Quality							
Staff uniforms for front of the house	N	N	N	N	N		Uniforms to be clean and in good repair
Front office staff English speaking			N	N	N		This may be relaxed outside the metros/submetros
Percentage of staff with minimum one year certificate course from Government recognised catering/ hotel institutes	10%	15%	20%	25%	30%		This may be relaxed for hotels in rural, pilgrimage and hill areas
Staff Welfare/Facilities							
Staff rest rooms	D	D	N	N	N		
Staff locker rooms	D	D	N	N	N		
Toilet facilities	N	N	N	N	N		
Dining area	D	D	D	N	N		
Guest Services							
Valet (Pressing) services to be available	D	N	N	N	N		

CHECKLIST FOR FACILITIES & SERVICES	1*	2*	3*	4*	5*/5D	Yes/No	Comments
Laundry and Dry-cleaning service to be provided	D	D	D	N	N		Service can be next day. In resort destinations, hill, rural & pilgrimage areas drycleaning services may be relaxed
Paid transportation on call	D	D	N	N	N		Guest should be able to travel from hotel.
Shoe cleaning service			N	N	N		May be charged. Shoe cleaning machines are acceptable in corridors for 4* 5* /5D*
Ice (from drinking water) on demand	D	D	N	N	N		Ice machines accessible to guests are acceptable. Maybe placed in corridors for 4*,5* & 5*D
Acceptance of common credit cards	D	D	N	N	N		
Assistance with luggage on request	N	N	N	N	N		
A public telephone on premises. Unit charges made known	D	D	N	N	N		There should be at least one telephone no higher than 24" from floor level in 5/5D*
Wake-up call service on request	N	N	N	N	N		
Messages for guests to be recorded and delivered	N	N	N	N	N		A prominently displayed message board will suffice for 1* & 2*
Name, Address and telephone numbers of doctors with front desk	N	N	N	N	N		Doctors on call in 3,4,5 5* deluxe
Stamps and mailing facilities	D	D	N	N	N		
Newspapers available	N	N	N	N	N		This may be in the lounge for 1*, 2* and 3* hotels
Access to Travel desk facilities	N	N	N	N	N		This need not be on premise for 1 to 3* hotels
Left luggage facilities	D	D	N	N	N		This must be in a lockable room/ 24 hour staffed area
Provision for emergency supplies - toiletries/first aid kit	D	D	N	N	N		This may be a chargeable item
Health/Fitness facilities	D	D	D	D	N		Indian system of treatments should also be preferably offered
Beauty Saloon and Barbers Shop				D	N		
Florist				D	D		
Shop/kiosk	D	D	N	N	N		Newstand, toiletries, novelties, games in resorts
Money changing facilities	D	D	D	N	N		
Bookshop	D	D	D	N	N		

CHECKLIST FOR FACILITIES & SERVICES	1*	2*	3*	4*	5*/5D	Yes/No	Comments
Safety & Security							
Staff trained in fire fighting drill	N	N	N	N	N		Quarterly drill or as per law
Security arrangements for all hotel entrances	N	N	N	N	N		
Each bedroom door fitted with lock and key, viewport/ peephole & internal securing device			N	N	N		A safety chain/ wishbone latch is acceptable in place of viewport/ peephole
Safekeeping facilities available	N	N	N	N	N		
Smoke detectors	N	N	N	N	N		
Safe-keeping facilities available	N	N	N	N	N		
Smoke detectors	N	N	N	N	N		These can be battery operated
Fire and emergency procedure notices displayed in rooms behind door	N	N	N	N	N		
Fire and emergency alarms should have visual & audible signals.	N	N	N	N	N		
First aid kit with Over the Counter medicines with front desk	N	N	N	N	N		
Communication Facilities							
A telephone for incoming & outgoing calls in the room	D	N	N	N	N		4* plus should have direct dial and STD/ISD facilities. 1*,2* and 3* may go through exchange
PC available for guest use with internet access	D	D	N	N	N		This can be a paid service. Upto 3*, PC can be in executive offices. Internet subject to local access being available
E-mail service	D	D	N	N	N		Subject to local internet access being available
Fax and photocopy service	N	N	N	N	N		
In Room internet connection/ dataport	D	D	D	D	N		Subject to local internet access being available
Business Centre	D	D	D	N	N		This should be a dedicated area. In resort destinations, tourist and pilgrimge centres this maybe relaxed
Swimming Pool			D	D	N		This can be relaxed for hill destinations
Parking Facilities	D	D	N	N	N		Should be adeqate in relation to the no. of rooms & banquet/ convention hall capacities.

CHECKLIST FOR FACILITIES & SERVICES	1*	2*	3*	4*	5*/5'D	Yes/No	Comments
							Exclusively earmarked accessible parking, nearest to the entrance for physically challenged persons.
Conference Facilities			D	D	D		
Note: D= Desirable, N= Necessary. There is no relaxation in the necessary criteria except, as specified in the comment column.							

**Government of India
Department of Tourism (H&R Cell)
Hotel Classification**

Mark sheet for quality

Criteria	Max Marks	Score	Comments
Exterior & Grounds	8		Exteriors, Approach 2/ Landscaping 2/ Exterior lighting 2/ Parking 2
Guest Rooms	10		Furniture 2/ Furnishings 2/ Decor 2/ Room facilities & amenities 2/ Linen 2
Bathrooms	8		Facilities 2/ Fittings 2/ Linen 2/ Toiletries 2
Public Areas	8		Furniture 2/ Furnishings 2/ Decor 2/ Restrooms 2
Food & Beverage	8		Choice of cuisine, menu 3/ decor 2/ food quality 3
Kitchens	8		Equipment 3/ State of repair 2/ food storage 3
Cleanliness	8		Overall impression
Hygiene	8		Pot & Dish Washing 2/ drinking water 2/ staff facilities 1/ pest control 2/ garbage disposal 1
Safety & Security	8		Fire fighting equipment 2/ signage 2/ awareness of procedures 2/ public area and room security 2
Communications	6		Phone service 2/ e-mail access 2/ internet access 1/ PC and other equipment 1
Guest Services	5		Overall impression
Eco-friendly practices	5		Waste management, recycling, no plastics 1/Water conservation, Harvesting 1/pollution control-air, water, sound, light 2/ Alternative energy usage 1/
Facilities for Physically challenged persons	5		At least a room for physically challenged persons 1/ public toilet in lobby1/telephone in public places 1/ ramps etc 1/facilities for aurally or visually handicapped 1
Staff quality	5		Overall impression
TOTAL	100		

Comments

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HRACC Members

1. 2. 3. 4. 5. 6.

Qualifying Score

5*D	90 %		
5*	80 %		
4*	75 %		
3*	65 %		
2*	55 %		
1*	50 %		

GUIDELINES FOR CLASSIFICATION OF HERITAGE HOTELS

Definition:

'Heritage Hotels' cover running hotels in palaces/castles/forts/havelies/hunting loges/ residence of any siz built prior to 1950. The facade, architectural features and general construction should have the distinctive qualities and ambience in keeping with the traditional way of life of the area. The architecture of the property to be considered for this category should not normally be interfered with. Any extension, improvement, renovation, change in the existing structures should be in keeping with the traditional architectural styles and constructional techniques harmonising the new with the old. After expansion/ renovation, the newly built up area added should not exceed 50% of the total built up (plinth) area including the old and new structures. For this purpose, facilities such as swimming pools, lawns etc. will be excluded. Heritage Hotels will be sub-classified in the following categories:

Heritage:

This category will cover hotel in Residences/Havelies/Hunting Lodges/Castles/Forts/ Palaces built prior to 1950. The hotel should have a minimum of 5 rooms (10 beds).

Heritage Classic:

This category will cover hotels in Residences/Havelies/Hunting Lodges/Castles/Forts/ Palaces built Prior to 1935. The hotel should have a minimum of 15 room (30 beds).

Heritage Grand:

This category will cover hotels in Residence/Havelies/Hunting Lodges/Castles/Forts/ Palaces built prior to 1935. The hotel should have minimum of 15 rooms (30 beds).

Room & Bath Size:

No room or bathroom size is prescribed for any of the categories. However, general ambience, comfort and imaginative readaptation would be considered while awarding sub-classification 'classic' or 'grand'.

SPECIAL FEATURES:

Heritage:

General features and ambience should conform to the overall concept of heritage and architectural distinctiveness.

Heritage Classic:

General features and ambience should conform to the overall concept of heritage and architectural distinctiveness. The hotel should provide at least one of the under mentioned sporting facilities.

Heritage Grand:

General features and ambience should conform to the overall concept of heritage and architectural distinctiveness. However, all public and private areas including rooms should have superior appearance and decor. At least 50% of the rooms should be airconditioned (except in hill stations where there should be heating arrangements). The hotel should also provide at least two of the under mentioned sporting facilities.

SPORTING FACILITIES :

Swimming Pool, Health Club, Lawn Tennis, squash, Riding, Golf Course, provided the ownership vests with the concerned hotel.

Apart from these facilities, credit would also be given for supplementary sporting facilities such as Golf, Boating, Sailing, Fishing or other adventure sports such as Ballooning, Parasailing, Wind-surfing, Safari excursions, Trekking etc. and indoor games.

CUISINE:

Heritage:

The hotel should offer traditional cuisine of the area.

Heritage Classic:

The hotel should offer traditional cuisine but should have 4 to 5 items which have close approximation to continental cuisine.

Heritage Grand:

The hotel should offer traditional and continental cuisine.

MANAGEMENT:

The Hotel may be managed and run by the owning family and/or professionals.

Note: Classification in any of the above categories will be given keeping in view the overall standard of the property. The hotel would be judged by the quality of service and the years of experience that the owner/staff have had in the business.

GENERAL FEATURES:

There should be adequate parking space for cars. All public rooms and areas and the guest rooms should be well maintained and well equipped with quality carpets/area rugs/good quality durries, furniture, fittings etc. in good taste and in keeping with the traditional lifestyle. If carpeting is not provided, the quality of flooring should be very good (This is not to suggest that old and original flooring whether in stone or any other material should be replaced unnecessarily). The guest rooms should be clean, airy, pest free without dampness and musty odour, and of reasonably large size with attached bathrooms with modern facilities (e.g. flush commodes, wash basins, running hot and cold water, etc.). There should be a well appointed lobby and/or lounge equipped with furniture of high standard with separate ladies and gents cloak rooms with good fittings.

FACILITIES:

There should be a reception, cash and information counter attended by trained and experienced personnel. There should be money changing facilities and left luggage room. There should be a well equipped, well furnished and well maintained dining room on the premises and, wherever permissible by law, there should be an elegant, well equipped bar/permit room. In the case of Heritage Grand and Heritage Classic. Bar is "desirable in the case of Heritage Basic." The kitchen and pantry should be professionally designed to ensure efficiency of operation and should be well equipped. Crockery, cutlery, glassware should be of high standard and in sufficient quantity, keeping in view the lifestyle and commensurate with the number of guests to be served. Drinking water must be bacteria free; the kitchen must be clean, airy, well lighted and protected from pests. There must be a filtration/purification plant for drinking water. There must be three tier washing system with running hot and cold water; hygienic garbage disposal arrangements; and frost free deep freezer and refrigerator (where the arrangement is for fresh food for each meal, standby generator will not be insisted upon).

SERVICES:

The hotel should offer good quality cuisine and the food and beverage service should be of good standard. There should be qualified, trained, experienced, efficient and courteous staff in service and clean uniforms and the staff coming in contact with the guests should

understand English, Housekeeping at these hotels should be of the highest possible standard and there should be a plentiful supply of linen, blankets, towels, etc. which of the highest possible standard and should be a plentiful be of high quality. Each guest room should be provided with a vacuum jug/flask with bacteria free drinking water. Arrangements for heating/cooling must be provided for the guest rooms in seasons. Places which have telephone lines must have at least one phone in the office with call bells in each guest room. Arrangements for medical assistance must be there in case of need. The staff/room ratio must be in keeping with the number of guest room in each property. These hotels must be run on a professional basis while losing none of their ambience and services.

The hotel should be environment friendly. The gardens and grounds should be very well maintained. There should be an efficient system of disposal of garbage and treatment of wastes and effluents.

The hotel should present authentic and specially choreographed local entertainment to the guests. They should also have, wherever possible, arrangements for special services such as wildlife viewing, water sports, horse/camel/elephant riding or safaris etc.

APPLICATION PROFORMA FOR APPROVAL OF HERITAGE HOTEL PROJECT

1. Proposed name of the Hotel:
2. Name of Promoters:
(a note giving details of business antecedents may be enclosed)
3. Complete Postal address of the Promoters.
4. Status of owners/Promoters:
Whether:
 - (a) Company
(if so, a copy of the Memorandum & Articles of Association may be furnished)
 - OR
 - (b) Partnership firm (If so, a copy of partnership Deed and Certificate of registration under the Partnership Act may be furnished)
 - OR
 - (c) Proprietary concern (Give name and address of the proprietor)
5. Location of the property alongwith postal address:
6. Details of the property
 - (a) Area
 - (b) TitleWhether outright purchase/ownership (if so, a copy of the registered sale deed should be furnished)

- OR
- On Lease
(if so, a copy of the registered lease deed should furnished)
- (c) Whether the required land use permit for the conversion into hotel on it have been obtained. (If so, a copy of certificate from the concerned local authorities should be furnished).

- (d) Distance from Railway Station:
- (e) Distance from Airport:
- (f) Distance from main shopping Centres:

7. Details of the Hotel Project (a copy fo the project/feasibility report should also be furnihsed).

(a) No. of guest rooms and their area:

	Number	Area
Single		
Double		
Suites		
Total:		

(b) No. of attached baths and their area:

(c) How many of the bathrooms will have long baths or the most modern shower chambers (Give break-up):

(d) Details of public areas: Number Area of each

- i) Lounge/Lobby
- ii) Restaurants/Dinning room:
- iii) Bar (if any):
- iv) Shopping (if any):
- v) Banquet/Conference Halls (if any):
- vi) Health Club(if any):
- vii) Swimming Pool (If any):
- viii) Parkig facilities:

(e) Blue prints of the sketch plans of the project. A complete set duly signed by the

promoter and the architects should be furnished including/showing among other things, the following:-

- i) Site Plan:
- ii) Front and side elevations:
- iii) Floorwise distribution of public rooms/guest rooms and other facilities.

8. Approval:

Whether the hotel project has been approved/cleared by/under the following agencies/ Acts wherever applicable:

- (a) Municipal authorities;
- (b) Urban Lands (Ceiling), Act:
- (c) Any other local/State Govt. authorities concerned.

9. Proposed Capital Structure:

- (a) Total estimated cost:
 - (i) Equity:
 - (ii) Loan:
- (b) Equity Capital so far raised:
- (c) (i) Sources from which loan is proposed to be raised:
 - (ii) Present position of the loan:

10. Acceptance of Regulatory conditions:

(This should be furnished in the prescribed proforma, as per sample attached):

11. Application Fee:

Demand Draft for Rs.12,000/- for hotel projects planned for Heritage, Hotel category drawn in favour of "Pay & Accounts Officer, Department of Tourism, New Delhi" must be attached with the application:

12. If you are interested in availing of any or all of the following benefits of the Income Tax Act, 1961, kindly mention Yes/No against each of the following provisions:

Section 80 IA

SEction 80 HHD

Signature

Full name and designation of the applicant:

Place:

Dated:

GUIDELINES FOR APPROVAL OF CONVENTION CENTRES

Meetings, Incentives, Conference and Exhibitions (MICE) are, today becoming an important segment of the tourism industry. With the opening up of India's economy, MICE Tourism is likely to grow further in the future. Our country therefore needs more Convention and Exhibition Centres to meet the requirement of this lucrative segment tourism. Taking this fact into consideration, therefore, the Ministry of Tourism has decided to grant approval to Convention Centres to encourage investment and standardise facilities at the Convention Centres.

APPROVAL

Approved Convention Centres, being essential tourism infrastructure are eligible for various benefits including among other things, income tax concessions, under the Income Tax Act and priority consideration of its various requirements like telephone, telex, LPG etc. by the Government authorities at Municipal, State and Union levels or a semi or quasi-Government body.

The approval can be applied for at project/planning stage. A Convention Centre approved at the project stage will be eligible for consideration for allocation of foreign exchange for its essential import of equipment and provisions. On completion and becoming functional it will get worldwide publicity through tourist literature published by the Ministry of Tourism and distributed through its offices in India and Overseas. Approved Convention Centres will also be eligible to apply to the Industrial Finance Corporation of India and Tourism Finance Corporation of India and the State Financial Corporations for loan. However, application for loan and incentives are considered by the respective Ministries/ Departments and Financial Institutions in the context of request to produce a detailed feasibility studies etc. and the project approval by the Ministry of Tourism should not in any way be construed as an assurance for the grant of any incentive or loan thereto.

General Features :

It is very essential that the proposed Convention Centre should contain at least one Convention Hall, two mini Convention Halls, one Exhibition Hall, one Restaurant & parking facilities as per details, given below :-

1. CONVENTION HALL

Convention Hall as the name suggests should have audio visual Conferencing equipment, facility for high fidelity recording, video projection/video graphs etc. and

skilled manpower at various levels. The seating capacity in the hall may be in a classroom style in the following category:-

- a) Above 1500 pax or
- b) 1200-1500 pax or
- c) 800-1200 pax or
- d) 300-800 pax

2. MINI CONVENTION HALLS

Mini Convention halls are equally important in Convention Centres as these halls are required for various seminars, committees, meetings etc. The seating capacity therefore, may be in a theatrical, or classroom style-to seat as follows:-

- a) 200-300 pax or
- b) 100-200 pax or
- c) 50-100 pax or
- d) 20-50 Pax

3. EXHIBITION HALL

Exhibition Hall is another important feature in Convention Centre. Delegates to the Convention as well as Trade related, promoters take part in Trade shows to promote their products during Conventions. As such, it is essential that such exhibition hall should have a capacity to accommodate at least 20 booths of 3 mts by 3. mts in size excluding passages in between the booths.

4. RESTAURANTS

Restaurants in the Convention Centre should conform to the existing guidelines of HRACC laid down by the Ministry.

5. PARKING

Parking facilities for not less than 50 cars and five coaches.

6. RESIDENTIAL ACCOMMODATION FOR DELEGATES/PARTICIPANTS

Applicable only, if promoters, desire to have residential accommodation in the convention complex and then guidelines laid down by the Ministry in respect of star category hotels will apply.

7. In addition to the above facilities convention centres should include the following infrastructural facilities:-

- i. Landscaped forefront
- ii. Exhibition Management Centre
- iii. Administrative facilities for corporate office including ISDN Internet etc.
- iv. Trade Show/Fair facilities such as Tourist office, Bank and Money changing facilities, Travel Desk, STD/ISD, Press Lounge, VIP Lounges etc.
- v. Technical facilities such as plant room, electric substation, stores, electric power back-up system, fire hydrant etc.
- vi. Gate Complex for stipulating entry and exit.
- vii. Information Booths
- viii. Public Convenience
- ix. Stationery Shops and Kiosks
- x. Public Address system
- xi. First Aid with Doctor on Call facilities.
- xii. Security Office and booths for Security arrangements
- xiii. Storage Complex for custom storage and handling etc.
- xiv. Fire safety arrangements.
- xv. Locker facilities

In order to enhance the value of the above facilities there must be space for other ancillary activities also. This could include the following:

- a) Handicraft shops, Souvenir shop
- b) Facilities, for the physically disabled persons.
- c) Other facilities for enhancing customer satisfaction.

APPLICATION

1. The application for approval of a Convention Centre should be submitted, in the Prescribed form complete in all respects, to the Director General of Tourism, C-1, Hutments, Dalhousie Road, New Delhi-110011.
2. The Powers to approve Convention Centres at a Project Stage/Operational Stage/ Re-approval will be exercised by the Chairman (HRACC).
3. The Re-approval is required to be done after 3 years. The application fee is nonrefundable and is payable by Demand Draft to the Pay & Accounts Office, Ministry of Tourism, New Delhi. The fee for Project Approval/operational Approval and Re-approval will be as follows:-
 - 1) Approval at the project stage Rs. 5,000/-
 - 2) Approval at Operational Stage Rs. 10,000/-
 - 3) Re-approval Rs. 5,000/-

REQUIREMENT

Various documents and information to be furnished about Convention Centre Projects when applying for project approval are given in details in the application form. However, the basic requirements are indicated so that these are sent along with the application:-

- i) A Project Report establishing the Feasibility of the proposed Convention Centre, describing the amenities to be provided at the Convention Centre particularly mentioning any special or distinctive features.
- ii) The site selected should be suitable for the construction of a Convention Centre intended for use by domestic as well as International business travellers. While selecting the site such aspects as its accessibility from airport/railway station/ shopping areas etc. making it a convenient location, may be kept in mind as also that its environs are not pollution prone, crowded, noisy, unhygienic etc.
- iii) A Land Use Permission Certificate from the concerned State/local authority certifying that it is permissible to construct a Convention Centre on the site selected. Blue Prints of the Sketch Plans of the Project duly approved by the State authority and signed by the Architect and the promoters should be furnished.
- iv) Ownership Deed of the Land
- v) Urban Land Ceiling Certificate, if applicable

- vi) Approval of International Airports Authority of India/Director General of Civil Aviation if the project is near an airport.
- vii) Name and Business antecedents of the promoters.
- viii) Proposed ownership structure, giving full details as to whether the new undertaking will be owned by individual(s) or a firm or a company.
- ix) Estimated Cost of the project and the manner in which it is proposed to raise the funds to meet the required investment.
- x) The Ministry has prescribed some Regulatory Conditions to be adhered to by promoters of approved Convention Centre Projects. The Promoters should furnish the acceptance of these regulatory conditions in the prescribed form. The Regulatory Conditions and the form of their Acceptance have also been appended.

REGULATORY CONDITIONS FOR APPROVAL OF CONVENTION CENTRE PROJECTS

All convention Centres approved by the Ministry of Tourism are required to furnish the following information:-

1. Documents relating to its legal status i.e. if the Company is incorporated under the companies Act, a copy of its Memorandum and Articles of Association if it is a Partnership, firm, a copy of the Partnership Deed and the Certificate of Registration under the Partnership Act; if it is a Proprietary Concern, Name and Address of the Proprietor etc.
2. Any licence and/or Approvals required from the local administration/Police and/or other concerned authorities for the construction/operation of the Convention centre should be obtained directly by the promoters from the concerned authorities. The approval by the Ministry will not in any way substitute for them. This Ministry's approval will be deemed to have been withdrawn in case of violation of any condition as and when brought to its notice.
3. In the event of the promoters making any changes in the plans of the project as submitted in the plans of the project as submitted earlier, the approval of this Ministry will have to be applied, for afresh.
4. As a project which has been approved from the point of view of its suitability for foreign clientele the promoters will be eligible for grant of loan from Central/State Financial Institutions and priority in the procurement of building material, telephone and telex connection etc. However, this approval should not in any way be construed as an assurance for the grant of these facilities since this would fall within the jurisdiction of the concerned authorities and the rules prescribed for the purpose.

CONDITIONS TO BE FULFILLED AFTER THE CONVENTION CENTRE/HOTEL BECOMES FUNCTIONAL

1. The Convention Centre must immediately inform this Ministry the date from which it becomes functional, and apply for approval within 3 months thereafter.
2. The Convention Centre will submit the following information to the Director General, Ministry of Tourism so as to reach on or before 31st May each year for the preceding financial year:-
 - (a) A bank certificate in regard to foreign exchange deposited by the Convention Centre/Hotel.
 - (b) No. of Conventions/Conferences/Seminars held and the no. of participants as per proforma given below:-

No.	Name of Conference/ Seminar Domestic/International	Date	No. of Participants	Name of Organisation
1	2	3	4	5
2.				
3.				
4.				
5.				
6.				

- (c) Total, bed capacity offered by the Hotel as Under (provided the Convention Centre is having residential accommodation)

Single Rooms:

Double Rooms:

Suites:
- (d) Number of rooms occupied on a permanent/ Semi Permanent basis by residents/staff officers etc.

- (e) A specimen copy of the current tariff card (applicable to Convention Centre having residential accommodation)
 - (f) List of the names of the Senior Executives with their designation, experience etc.
 - (g) Total number of persons employed.
 - (h) Annual Report of the Convention Centre/Hotel and a statement showing the audited Balance sheet and Profit and Loss account within 4 months of the close of the financial year.
 - (i) Statistical returns in regard to the number of events held guests, rooms, occupancy, income and employment on quarterly basis as prescribed by the Ministry of Tourism from time to time.
3. The Regional Director/Director/Manager of the Government of India Tourist Offices of the region and the Director General, Ministry of Tourism would be kept informed from time to time of facilities introduced or withdrawn and of any additions or alterations made in regard to Convention Centre.
 4. The hotel tariff should be prominently displayed in each room. This card shall also indicate all taxes, service charge etc. (where applicable)
 5. Normally, no rooms will be let out for purposes other than residential. However, with the prior approval of the Ministry of Tourism not more than 10 per cent of the rooms in the hotel will be let out to any person or company for residential or commercial purposes.
 6. The Convention Centre should at all times adhere to the high standard of maintenance and services for which it has been approved and in all dealing with its guests observe practice worthy of an establishment of repute.
 7. The officers of the Ministry of Tourism or any other officer deputed by it to inspect premises from time to time will be allowed free access with or without prior notice.

**IN THE EVENT OF BREACH OF ANY OF THE ABOVE CONDITIONS
BY THE CONVENTION CENTRE THE MINISTRY OF TOURISM
SHALL HAVE THE RIGHT TO WITHDRAW APPROVAL.**

APPLICATION PROFORMA FOR APPROVAL OF CONVENTION CENTRE

1. Proposed name of the Convention Centre
2. Name of Promoters:
(a note giving details of business antecedents may be enclosed)
3. Complete Postal address of the Promoters
4. Status of owners/Promoters: Whether
 - (a) Company
(if so, a copy of the Memorandum & Articles of Association may be furnished)

(OR)
 - (b) Partnership firm:
(if so, a copy of partnership Deed and Certificate of registration under the Partnership Act may be furnished)

(OR)
 - (c) Proprietary Concern (give name and address of the Proprietor)
5. Location of Convention Centre alongwith Postal address:
6. Details of the site
 - (a) Area
 - (b) Title
Whether outright purchase (if so, a copy of the registered sale deed should be furnished)

(OR)

On lease
(if so, a copy of the registered lease deed should be furnished)
 - (c) Whether the required Land-Use Permit for the construction of Convention Centre

on it has been obtained (if so; a copy of the Certificate from the concerned local authorities should be furnished).

(d) Distance from Railway Station:

(e) Distance from Airport:

(f) Distance from main city centres:

7. Details of the Convention Centre Project:
(copy of the Project/Feasibility Report should be furnished)

(I) No. of Convention Halls
(Please indicate seating Capacity)

a)

b)

c)

d)

(II) No. of Mini Convention Halls
(Please indicate Seating Capacity)

a)

b)

c)

d)

(III) Exhibition Hall
(Please indicate area)

(IV) Restaurant
(Please indicate area)

(V) Parking
(Please indicate area and no. of cars/coaches that can be parked)

(VI) Star Category of accommodation unit planned (if applicable).

i). No. of guest rooms and their area:

	Number	Area
a) Single		
b) Double		
c) suites		
Total:		

ii) No. of attached baths and their area:

(a) How many of the bathrooms will have long baths or the most modern shower chambers (Give breakup)

(b) Details of Public areas :

	Number	Area of Each
1. Lounge/ Lobby/Reception		
2. Restaurants		
3. Bar		
4. Shopping		
5. Banquet/Catering Facilities		
6. Health Club		
7. Swimming Pool		

NOTE: It may be ensured that areas of guest rooms and attached bathrooms confirm to the minimum standards laid down by the Ministry of Tourism for Restaurant and for different star categories of Hotels.

(h) Blue prints of the sketch plans of the project. (A complete, set duly approved by State Authorities and signed by the promoter and the architect should be furnished,

including/showing among other things, the following:-

- (i) Site Plan
- (ii) Front and side elevations
- (iii) Floorwise distribution of public areas/guest rooms and other facilities
- (iv) (a) Area of Convention Halls/Mini Convention Hall/Exhibition Hall
 - (b) Area of guest rooms with dimensions (if applicable)
 - (c) Area of bathrooms with dimensions

8. Airconditioning:

- (a) Whether all the Convention Halls and guest rooms will be airconditioned.
- (b) Whether all the public areas will be airconditioned.
- (c) Give details of type of airconditioning

9. Approval

Whether the Convention Centre project has been approved/cleared by/under the following agencies/Acts wherever applicable:

- (a) Municipal authorities
- (b) Urban Lands (Ceilling) Act
- (c) Any other Local/State Govt. Authorities concerned.

10. Proposed Capital Structure:

- a) Total estimated Cost
 - (i) Equity
 - (ii) Loan
- b) Equity Capital so far raised

c) (i) Sources from which loan is proposed to be raised

(ii) Present position of the loan

11. Acceptance of Regulatory Conditions

(This should be furnished in the prescribed Proforma)

12. Application Fee-Demand Draft No. Dated
drawnon (Bank)

13. If you are interested in availing of any or all of the following benefits of the Income Tax Act 1961 kindly mention Yes/No against each of the following provisions:

Section 80- HHD/1A

Any other

Signature

Full Name and Designation of the

Applicant

Place

Dated

FORMAT OF ACCEPTANCE OF REGULATORY CONDITIONS FOR APPROVAL OF CONVENTION CENTRE PROJECT AND CONDITION TO BE FULFILLED AFTER THE CONVENTION CENTRE/HOTEL BECOMES FUNCTIONAL.

To

The Director General
Ministry of Tourism
New Delhi

Sub:-Acceptance of Regulatory Conditions for approval of Convention Centre Project & condition to be fulfilled after the Convention Centre/Hotel becomes functional.

Dear Sir,

I have received a copy of the Regulatory Conditions for approval of Convention Centre Projects prescribed by the Ministry of Tourism for Convention Centre on its approved list, and wish to confirm that I have read and understood the same and hereby agree to abide by the same and such other conditions as may be laid down from time to time by the Ministry of Tourism for approval of Convention Centre.

Yours faithfully,

(Name in Block Letters) Managing Director/

Partner/Proprietor

Name of the Convention

Centre.....

Dated:

(Note : This letter should be in the Company' Letter Head)

**GUIDELINES FOR RECOGNITION AS APPROVED
TRAVEL AGENT**

[WITH EFFECT FROM 27.11.2003]

1. The aims & objectives of the scheme for recognition of Travel Agent is to encourage quality standard and service in this category so as to promote tourism in India. This is a voluntary scheme open to all bonafide travel agencies.
2. **Definition:** A Travel Agency is one which makes arrangements of tickets for travel by air, rail, ship, passport, visa, etc. It may also arrange accommodation, tours, entertainment and other tourism related services.
3. All applications for recognition shall be addressed to the Additional Director General (Tourism), Ministry of Tourism, Transport Bhawan, No.1, Parliament Street, New Delhi-110001.
4. The following conditions must be fulfilled by the Travel Agency for grant of recognition by Department of Tourism:-
 - i) The application for grant of recognition shall be in the prescribed form and submitted in duplicate.
 - ii) The travel Agency has a minimum paid-up capital (or capital employed) of Rs.3.00 lakhs duly supported by the audited balance sheet/Chartered Accountant's Certificate.
 - iii) The Travel Agency should be approved by International Air Transport Association (IATA) or should be General Sales Agent (GSA)/Passenger Sales Agent (PSA) of an IATA member Airlines.
 - iv) The Travel Agency should have been in operation for a minimum period of one year before the date of application.
 - v) The minimum office space should be 250 sq.ft. Besides, the office may be located in a neat and clean surrounding and equipped with telephone, fax and computer reservation system etc. There should be sufficient space for reception and easy access to toilet facilities.
 - vi) The Travel Agency should be under the charge of a full time member who is adequately trained, experienced in matters regarding ticketing, itineraries, transport, accommodation facilities, currency, customs regulations and travel and tourism related services. Besides this, greater emphasis may be given to

effective communication skills, knowledge of foreign languages, other than English. There should be minimum of four qualified staff out of which at least two should have Diploma/Degree in Travel and Tourism from recognised University, IITTM or Institutions approved by AICTE.

The academic qualifications may be relaxed in case of exceptionally experienced personnel in Airlines, Shipping, Transport and PR agencies, Hotel and other Corporate Bodies and those who have worked for 3 years with IATA/UFTA Agencies.

The academic qualifications may also be relaxed in cases where the travel agency companies are located at North-east, religious, remote and small cities. There should be a minimum of two qualified staff.

- vii) The Travel Agency is an income-tax assessee and has filed Income Tax Return for the current assessment year.
 - viii) The Travel Agency should employ only Regional Guides trained and licensed by the Department of Tourism, Government of India and State level Guides as well as local guides approved by State Governments.
 - ix) For outsourcing any of the services relating to tourists, the travel agencies shall use approved specialised agencies in the specific field of activity.
5. Recognition as travel agency will be granted for 3 years and renewal thereafter for 5 years on an application made by travel agency along with fee.
 6. The Travel Agency will be required to pay a non-refundable fee of Rs.3,000/- while applying for the recognition and renewal of Head Office as well as each Branch Office. The fee will be payable to the Pay and Accounts Officer, Department of Tourism, in the form of a Bank Draft.
 7. Recognition will be granted to the Head Office of the Travel Agency. Branch Offices will be approved along with the Head Office or subsequently, provided the particulars of the Branch Offices are submitted to Department of Tourism and accepted by it.
 8. The Travel Agency granted recognition shall be entitled to such incentives and concessions as may be granted by the Government from time to time and shall abide by the terms and conditions of recognition as prescribed from time to time.
 9. The decision of the Government of India in the matter of recognition shall be final. However, the Government of India may in their discretion refuse to recognise any firm or withdraw/withhold at any time recognition already granted with the approval of the competent authority. Before such a decision is taken, necessary Show Cause Notice would invariably be issued and the reply considered on merit. This will be done as a last resort and circumstances in which withdrawal is resorted would also be indicated.

APPLICATION FORM FOR RECOGNITION AS APPROVED TRAVEL AGENCY

1. Name of the Organisation
Address of Head office
Address of the Branch offices (if any)
2. Nature of the Organisation
Year of registration/commencement of business (with documentary proof)
.....
3. Name of Directors/Partners etc
Details of their interests, if any, in other business may also be indicated.
.....
4. Particulars of staff employed
Name Qualifications Experience Salary Length of Service with the firm
1.
2.
3.
5. Details of office premises Space in sq.ft.
Location commercial residential Reception area
accessibility to toilets
6. Name of Bankers (please attach a reference from your Bankers)
7. Name of Auditors
A balance-sheet and profit and loss statement pertaining to the travel business, as prescribed under Company Law, must be submitted by each applicant. These audited statements should be in respect of your establishment for the last completed financial year or for the calendar year immediately preceding the date of submission of your application. Also furnish details of your turnover in the following proforma:-

Particulars of the Travel Agency concerned

- a) Paid up capital (capital employed)
- b) Loans :
 - i) Secured
 - ii) Unsecured
- c) Reserves
- d) Current liabilities and provisions
- e) Total (a to b) :
- f) Fixed assets (excluding intangible assets)
- g) Investment

- h) Current assets
- i) Intangible Assets
- j) Total (f to i)

Notes:

- i) Intangible assets should include goodwill preliminary expenses, tenancy and business rights, deferred revenue expenditure, accumulated loss etc.
 - ii) Reserves should include balance of profit and loss Account and exclude taxation reserve.
 - iii) Current liabilities and provisions would include taxation reserve.
 - iv) Current assets should include sundry debts, loans advances, cash and bank balance
8. Copy of acknowledgement in respect of Income tax return for the current assessment year should be enclosed
 9. Whether any other activities are undertaken by the firm besides travel related activities
 10. Indicate membership of International Travel Organisations, if any
 11. Letter of approval of IATA and Certificate of accreditation for current year should be enclosed. GSAs/PSAs of IATA airlines should be enclosed (documentary proof in this regard).
 12. Indicate the Air/Shipping/Railway ticketing agencies held by the firm
 13. Enclosed Demand Draft of Rs. 3000/- for Head Office and Rs.3000/- for each Branch Office as fee for recognition/renewal.

Please mention the D.D. No.....Date Amount

Please mention the D.D. No.....Date Amount

Signature of Proprietor/Partner/Managing Director

Rubber Stamp

Place:

Date:

NB. I This application should be submitted in duplicate along with supporting documents.

II Reference number of Department of Tourism should be quoted if the application is for renewal of recognition

GUIDELINES FOR RECOGNITION AS APPROVED TOUR OPERATOR

[WITH EFFECT FROM 27.11.2003]

1. The aims & objectives of the scheme for recognition of Tour Operator is to encourage quality standard and service in this category so as to promote tourism in India. This is a voluntary scheme open to all bonafide tour Operators.
2. **Definition:** A tour operator is one which makes arrangements for transport, accommodation, sight seeing, entertainment and other tourism related services for tourists.
3. All applications for recognition shall be addressed to the **Additional Director General(Tourism)**, Ministry of Tourism, Transport Bhawan, 1, Parliament Street, New Delhi- 110 001.
4. The following conditions must be fulfilled by the Tour Operator for grant of recognition by Department of Tourism:
 - i) The application for grant of recognition shall be in the prescribed form and submitted in duplicate.
 - ii) The Tour operator should have a minimum paid up capital (or capital employed) **of Rs.3.00 lakhs** duly supported by the latest audited balance sheet/Chartered Accountant's certificate.
 - iii) The turn-over in terms of foreign exchange by the firm from tour operation only should be a minimum of **Rs. 10.00 lakhs** duly supported by Chartered Accountant's certificate.
 - iv) The Tour operator has an office under the charge of a full time member of their staff, who is adequately trained/experienced in matters regarding transport, accommodation, currency, customs regulations and general information about travel and tourism related services. However, greater emphasis may be given to effective communication skills and knowledge of foreign language other than English.

There should be a minimum of four qualified staff out of which at least two should have Diploma/Degree in Travel and Tourism from recognised university, IITTM or an institution approved by AICTE.

The academic qualifications may be relaxed in case of experienced personnel in Airlines, Shipping, Transport, PR Agencies, Hotels and other corporate bodies and those who have 2 years experience with Department of Tourism approved tour operators.

Similarly, for the agencies located at North-east, religious, remote and small cities, there should be a minimum of two qualified staff.

- v) The Tour Operator should have been in operation for a minimum period of one year before the date of application.
 - vi) The minimum office space should be of 250 sq. ft besides the office may be located in neat and clean surroundings and equipped with telephone, fax and computer reservation system etc. There should be sufficient space for reception and easy access to toilets.
 - vii) The Tour operator should be an income tax assessee and should have filed Income Tax Returns for the last or current assessment year.
 - viii) Tour Operators should employ only Regional Guides trained and licenced by the Department of Tourism, Govt. of India and State level Guides as well as local guides approved by the State Governments.
 - ix) The tour operator shall contract/use approved specialized agencies in the field of Adventure Options and related services for the tourists.
5. The recognition as Approved Tour Operator shall be granted for three years and renewal thereafter every five years on an application made by the tour operator along with the required fee.
 6. The tour operator will be required to pay a non-refundable fee of Rs.3000/- while applying for the recognition and renewal of Head Office as well as each Branch Office. The fee will be made payable to the Pay & Accounts Officer, Department of Tourism in the form of a Bank Draft.
 7. Recognition will be granted to the Headquarter Office of the Tour Operator. Branch offices will be approved along with the Headquarters Office or subsequently, provided the particulars of the Branch offices are submitted to Department of Tourism and accepted by it.
 8. Tour operator granted recognition shall be entitled to such incentives and concessions as may be granted by Government from time to time and shall abide by the terms and conditions of recognition as prescribed from time to time by the Department of Tourism, Government of India.
 9. The decision of the Government of India in the matter of recognition shall be final. However, the Govt. of India may in their discretion refuse to recognise any firm or withdraw/withhold at any time recognition already granted with the approval of the Competent Authority. Before such a decision is taken, necessary show cause notice would invariably be issued and the reply considered on merit. This will be done after careful consideration and generally as a last resort. Circumstances in which withdrawal is resorted would also be indicated.

APPLICATION FORM FOR RECOGNITION AS APPROVED TOUR OPERATOR

1. Name of the Organisation
 Address of Head office
 Address of the Branch offices (if any)
2. Nature of the Organisation
 Year of registration/commencement of business (with documentary proof)

3. Name of Directors/Partners etc.
 Details of their interests, if any
 In other business may also be indicated.

4. Particulars of staff employed

	Name	Qualifications	Experience	Salary	Length of Service with the firm
1
2
3
5. Details of office premises Space in sq.ft.
 Location area commercial residential
 Reception area..... accessibility to toilets
6. Name of Bankers (please attach a reference from your Bankers)
7. Name of Auditors
 A balance-sheet and profit and loss statement pertaining to the tour operation
 business, as prescribed under Company Law, must be submitted by each applicant.
 These audited statements should be in respect of your establishment for the last
 completed financial year or for the calender year immediately preceding the date of
 submission of your application. Also furnish details of your turnover in the following
 statement:-

Particulars of the Tour Operator concerned

- a) Paid up capital (capital employed)
- b) Loans :
 i) Secured
 ii) Unsecured
- c) Reserves
- d) Current liabilities and provisions
- e) Total (a to d) :
- f) Fixed assets (excluding intangible assets)
- g) Investment
- h) Current assets
- ii) Intangible Assets
- j) Total (f to i)

Notes:

- i) Reserves should include balance of profit and loss Account and exclude taxation reserve.
 - ii) Current liabilities and provisions would include taxation reserve.
 - iii) Current assets should include sundry debts, loans advances, cash and bank balance
 - iv) Intangible assets should include goodwill preliminary expenses, tenancy and business rights, deferred revenue expenditure, accumulated loss etc.
- 8 Copy of acknowledgement in respect of Income tax return for the current assessment year should be enclosed
- 9 Whether any activities are undertaken by the firm should be enclosed
10. Please indicate membership of International Travel Organisations, if any
11. a) Give details of volume of tourist traffic handled and domestic tourist traffic separately. (Please submit a certificate from a chartered accountant). This certificate should show the receipts from tour operation only during the financial year or the calendar year immediately preceding the date of submission of your applications).
- b) Clientele : special tourist groups handled, if any, their size, frequency, etc.
 - c) Steps taken to promote domestic tourist traffic and details of the groups handled, if any.
 - d) Special programmes if any, arranged for foreign tourists
12. Number of conferences handled, any, and the total number of passengers for such conferences with details of locations, etc.
13. Number of incentive tours handled.
- Please enclose Demand Draft of Rs. 3000/- for Head Office and Rs.3000/- for each Branch Office as fee for recognition/renewal.

Please mention the D.D. No.....Date Amount

Please mention the D.D. No.....Date Amount

Signature of Proprietor/Partner/Managing Director

Rubber Stamp

Place:

Date:

NB. I This application should be submitted in duplicate along with supporting documents.

II Reference number of Department of Tourism should be quoted if the application is for renewal of recognition.

**GUIDELINES FOR RECOGNITION AS APPROVED
TOURIST TRANSPORT OPERATOR
[WITH EFFECT FROM 27.11.2003]**

1. The aims & objectives of the scheme for recognition of Tourist Transport Operator is to encourage quality standard and service in this category so as to promote tourism in India. This is a voluntary scheme open to all bonafide tourist transport operators.
2. **Definition:** A Tourist Transport Operator Organisation is one, which provides tourist transport like cars, coaches, boats etc. to tourists for transfers, sightseeing and journeys to tourist places etc.
3. All applications for recognition shall be addressed to the **Additional Director General(Tourism)**, Transport Bhawan, No.1, Parliament Street, New Delhi-110 001.
4. The following conditions must be fulfilled by the Tourist Transport Operator for grant of recognition by Deptt. of Tourism:-
 - i) The application for grant of recognition shall be in the prescribed form and submitted in duplicate.
 - ii) The applicant should have been in the tourist transport hire business for a minimum period of one year at the time of application.
 - iii) The Tourist Transport Operator has operated in the above period a minimum number of 4 tourist vehicles with proper tourist permits issued by the concerned STA/RTA for tourist vehicles. Out of these four tourist vehicles, at least two must be cars.
 - iv) The applicant has adequate knowledge of handling the tourist transport vehicles for transferring tourists from the Airport, Railway Stations etc. and for sight-seeing of tourists both foreign and domestic. The drivers should have working knowledge of English and Hindi/local languages.
 - v) The drivers of the tourist vehicles have proper uniform and adequate knowledge of taking the tourist for sight seeing.
 - vi) The applicant should have proper parking space for the vehicles.
 - vii) The Tourist Transport Operator is registered with the appropriate authority for carrying on the business of operating tourist transport vehicles.

5. (a) For Ex-Defence personnel, the condition of being in the business of tourist transport vehicles for 1 year is relaxable to 6 months and having 4 vehicles is relaxable to 2 tourist vehicles provided the candidate is sponsored by the Director General of Resettlement, Ministry of Defence, New Delhi. However, the ex-Defence personnel who apply under this scheme must themselves operate the tourist transport business and should not be hireman of other financiers.

(b) The condition of being in operation for one year for recognition as an approved tourist transport operator can be relaxed to six months and number of tourist vehicles to three in the case of those applicants who have their business at the centres identified and declared for the purpose by the Department of Tourism from time to time. A current list of such centres can be made available on request.
6. The Tourist Transport Operator is required to pay a non-refundable fee of **Rs. 3,000/ - while applying for the recognition for Head Office and each Branch Office. The same fee is payable at the time of renewal of Head Office as well as Branch Offices.** The fee will be made payable to the Pay & Accounts Officer, Department of Tourism in the form of a Bank Draft.
7. The applicant should be income tax assessee and should submit copy of acknowledgement certificate as proof of having filed income tax return for current assessment year.
8. The decision of the Government of India in the matter of recognition shall be final. The Government of India may in their discretion refuse to recognise any firm or withdraw/withhold at any time recognition already granted without approval of the competent Authority. Before such a decision is taken, necessary show cause notice would invariably be issued and the reply considered on merit. This will be done after careful consideration and generally as a last resort circumstances in which withdrawal is resorted would also be indicated.
9. Recognition on approval Tourist Transport Operator shall be granted for a period of 3 years and renewal thereafter every 5 years on the basis of application made by the operator alongwith the required fee.
10. Tourist Transport Operator granted recognition shall be entitled to such incentives and concessions as may be granted by Govt. from time to time and shall abide by the terms and conditions of recognition as prescribed form time to time.

**APPLICATION FORM FOR RECOGNITION AS APPROVED
TOURIST TRANSPORT OPERATOR**

1. Name of the firm with address, telephone, telex and fax number
2. Nature of the firm and date of registration/commencement of business with documentary proof.
3. Name of Directors/Partners etc. Details of their interests, if any, in other business may also be indicted.
4. Particulars of the staff employed (including drivers) please indicate Name, qualification, experience, length of service, salary etc.
5. Details of office premises. Please indicate space in sq. ft., location, whether commercial or residential, reception area, accessibility to toilets.
6. Name of the Bankers (attach reference from your Bankers).
- 7.. Name of the Travel Agents/Tour Operators/Hotels/Airlines with whom most business is transacted.
8. Please attach a copy of the audited balance sheet and profit & loss statement duly certified by the Chartered Accountant for the year preceding the date of application along with copy of acknowledgement certificate in respect of Income Tax Return for current assessment year.
9. Please indicate the loans and mortgages as on the date of application.
10. Number of vehicles viz. AC Coaches, Non-AC Coaches, Mini Coaches, cars and boats operated as tourist vehicles with their Make, Model and Registration (Attach list of vehicles.)
11. Attested copies of valid permits issued by RTA/STA for tourist vehicles and R.C. Books of Tourist Vehicles should be furnished.
12. No. and date of Bank Demand Draft for Rs.3,000/- as recognition fees for Head Office and Rs.3000/- for each branch office in favour of Pay & Accounts Officer, Deptt. of Tourism, New Delhi (similar fees is payable for renewal also).

Signature _____
Designation _____
Rubber Stamp of Company

Date:
Place:

- N.B.** i) This application should be submitted in duplicate along with supporting documents.
ii) Reference number of Department of Tourism should be quoted if the application is for renewal of recognition.

**GUIDELINES FOR RECOGNITION AS APPROVED
ADVENTURE TOUR OPERATOR WITH
EFFECT FROM 6.12.2004**

1. **Aims and objectives** :The aims & objectives of the scheme for recognition of Adventure Tour Operator is to encourage quality standard and service in this category so as to promote tourism in India. This is a voluntary scheme open to all bonafide Adventure Tour Operators.
2. **Definition**: An Adventure Tour Operator is one who is engaged in activities related to Adventure Tourism in India namely water sports, aero sports, mountaineering and trekking and safaries of various kinds etc. In addition to that he may also make arrangements for transport, accommodation, etc.
3. All applications for recognition shall be addressed to the Additional Director General (Tourism), Ministry of Tourism, Transport Bhawan, Parliament Street, New Delhi-110 001.
4. The following conditions must be fulfilled by the Adventure Tour Operator for grant of recognition by the Ministry of Tourism:-
 - i) The application for grant of recognition shall be in the prescribed proforma and submitted in duplicate.
 - ii) The Adventure Tour Operator should have a minimum paid up capital (capital employed) of Rs. 3.00 lakh duly supported by the latest audited balance sheet/chartered Accountant's certificate.
 - iii) The turnover in term of foreign exchange or Indian rupees by the firm from Adventure Tourism related activities only should be a minimum of Rs.10.00 lakh duly supported by a certificate issued by Chartered Accountant.
 - iv) The Adventure Tour Operator should have a proper Office with a minimum area of 250 sq. ft. The office should be located in neat and clean surroundings and equipped with telephone, fax and computer/computer reservation system etc. There should be sufficient space for reception and easy access to toilets.

The Adventure Tour operator should have a minimum of 2 experienced and well qualified executive staff under its direct employment. Either owner/Director himself or their operations-chief employed should be well qualified in the activity the adventure operator wants to pursue, which is determined by certification by any national or international institute in the activity or minimum of eight years of practical experience.
 - v) The Agency must clearly indicate its specialisation of activities or activity it wishes to pursue as business like trekkings, water sports, aero sports, scuba diving, Safaris etc.

- vi) The operator must have his own Adventure equipment as well as specialised trained staff.
 - vii) The field staff members of the party must be qualified for the activity or must have minimum of 5 years of practical experience. The staff member must obtain an Adventure certificate from the specialised organisations like IMF (for Mountaineering/trekkings) & NIWS Goa (for Water Sports/Aero sports etc.).
 - viii) Field members of the company must be qualified in First-aid/C.P.R by Red Cross or equivalent body or certificate course conducted by the Adventure Tour Operators Association of India.
 - ix) The party must sign an undertaking for adherence to sustainable ecological practice and protection of environment in keeping with guidelines for eco-tourism and safety and security guidelines of Ministry of Tourism/Adventure Tour Operator Association of India.
 - x) It will be recommended to distribute a copy of the eco-tourism guidelines to each client.
 - xi) The agency must maintain in its office premises all the maps and reference material concerning the particular activities it desires to pursue as business.
 - xii) The party must have printed brochure or website clearly describing its i) present activities. (ii) its area of operation (iii) its commitment to follow eco-tourism guidelines.
 - xiii) The firm should clearly indicate the area of specialisation in all their promotional and display material.
 - xiv) Principles of Eco Tourism as being espoused by ATOAL Membership of PATA Green Leaf is optional.
 - xv) The Adventure Tour Operator should have filed Income Tax Return for the current assessment year.
 - xvi) The Adventure Tour Operator should have been in operation for a minimum period of one year before the date of application.
5. Although a large number of activities come under Adventure Tourism, the Ministry of Tourism has decided to grant recognition primarily to the following four categories of Adventure Tour Operators at this point of time:-
- | | |
|-----|---|
| I | Operators dealing with water sports. |
| II | Operators dealing with aero-sports. |
| III | Operators dealing with safaries of various types. |
| IV | Operators dealing with mountaineering and trekking. |

6. Safety guidelines:

- (i) Safety guidelines for water sports, Aero-sports, safaris, mountaineering and trekking which have to be followed by Adventure Tour Operators have been appended for reference at Annexure I. It may be noted that in a number of adventure activities, a risk is involved and, therefore, it must be ensured by the adventure tour operator that safety guidelines are strictly followed. In case the Tour Operator is making arrangements through sub-agents, it will be the responsibility of the Principal Tour Operator to ensure that sub-agents provide proper equipment to clients and all safety measures are followed to.
 - (ii) The Adventure Tour Operator may also ensure that their counterpart abroad must obtain an undertaking from the foreign tourists that in case of any loss, damage/accident etc., the travel agency will not be responsible and the client must be covered by the medical, insurance and should include the cost of repatriation fee if he/she is to continue the tour.
 - (iii) Insurance: The adventure tour operator has qualified staff to handle the operations. Since adventure has an in-built risk factor, the Clients/Adventure Tour Operators should be covered by insurance. This insurance is termed as "Special Contingency Policy". It is specific to cover the risk factor of the Client/Adventure Tour Operator, i.e. it covers accidental deaths, loss of limbs and/or eyes and permanent/partial disability.
 - (iv) **Disclaimer:** The Ministry of Tourism, Government of India would not be responsible for any claims by clients of the approved Adventure Tour Operator.
7. The recognition as approved adventure tour operators shall be granted for three years and renewal thereafter every five years on an application made by the adventure tour operator along with the prescribed fee.
 8. The Adventure Tour Operator will be required to Pay a non-refundable fee of Rs.3,000/- (Rupees three thousand only) while applying for the recognition and renewal of the Head Office as well as each Branch Office. The fee will be made payable to the Pay & Accounts Officer, Ministry of Tourism in the form of a Bank Draft.
 9. Recognition will be granted to the Head Office of Adventure Tour Operators. Branch Offices will be approved along with head office or subsequently provided particulars of Branch Offices are submitted to the Ministry of Tourism and accepted by it.
 10. The decision of the Government of India in the matter of recognition shall be final. However, the Government of India may in their discretion refuse to recognise any firm or withdraw/withhold recognition already granted with the approval of the Competent Authority at any time. Before such a decision is taken, necessary

show cause notice would be issued and the reply considered on merit. Termination will be done only after careful consideration and generally as a last resort. Reasons for withdrawal would be mentioned in the show cause notice and final order. In special circumstances such as threat to the security of the state detailed reasons may be withheld.

11. For recognition of adventure tour operator, representatives from the Adventure Tour Operators Association of India specializing in such activities will be included as inspection team members.
12. The Adventure Tour Operators granted recognition shall be entitled to such incentives and concessions as may be granted by Government of India from time to time and shall abide by the terms and conditions of recognition as prescribed from time to time by the Ministry of Tourism, Government of India.
13. While submitting the application, the Adventure Tour Operator must indicate the arrangements for emergency lift and evacuation of clients in case of mishap.

**APPLICATION FORM FOR RECOGNITION AS
APPROVED ADVENTURE TOUR OPERATOR**

1. Name of the Organisation
 Address of Head office
 Address of the Branch offices (if any)

2. Nature of the Organisation
 (Also please indicate the
 specialisation of activities)
 Year of registration/commencement of business (with documentary proof)

3. Name of Directors/Partners etc.
 Details of their interests, if any.....
 In other business may also be indicated.

4. Particulars of staff employed
 Name Qualifications Experience Salary Length of Service with the firm

 1.....
 2.....
 3.....
 4.....

5. Details of office premises Space in sq.ft.

 Location area commercial residential
 Reception area..... accessibility to toilets

6. Name of Bankers (please attach a reference from your Bankers)

7. Name of Auditor.....
 A balance-sheet and profit and loss statement pertaining to the tour operation
 business, as prescribed under Company Law, must be submitted by each
 applicant. These audited statements should be in respect of your establishment for
 the last completed financial year or for the calendar year immediately preceding the
 date of submission of your application. Also furnish details of your turnover in the
 following statement:-

Particulars of the Adventure Tour Operator concerned

- a) Paid up capital (capital employed)
- b) Loans :
 - i) Secured
 - ii) Unsecured
- c) Reserves

- d) Current liabilities and provisions
- e) Total (a to d) :
- f) Fixed assets (excluding intangible assets)
- g) Investment

- h) Current assets
- Intangible Assets
- Total (f to i)

Notes:

- i) Reserves should include balance of profit and loss Account and exclude taxation reserve.
 - ii) Current liabilities and provisions should include taxation reserve.
 - iii) Current assets should include sundry debts, loans advances, cash and bank balance
 - iv) Intangible assets should include goodwill preliminary expenses, tenancy and business rights, deferred revenue expenditure, accumulated loss etc.
8. Copy of acknowledgement in respect of Income tax return for the current assessment year should be enclosed
 9. Whether any other activities are undertaken by the firm besides tour operations.
 10. Please indicate membership of International Travel Organisations, if any
 11. a) Give details of volume of tourist traffic handled upto the date of application showing foreign and internal tourist traffic separately. Please submit a certificate from Chartered Accountant. This certificate should show the receipts from Tour operation only during the financial year or the calendar year immediately preceding the date of submission of your application.
 - b) Clientele : special tourist groups handled, if any, their size, frequency, etc.
 - c) Steps taken to promote domestic tourist traffic and details of the group handled, if any.
 - d) Special programmes if any, arranged for foreign tourists
 - 12 Please indicate details of trained manpower available to operate such tours. (Please give details of the persons employed in your organisation who are trained and also attach copies of their certificates of training they have undertaken).
 - 13 Whether the agency has its own equipments or to be hired from another handling agency. Give details of the equipment available.
 - 14 The handling agency if located outside or at operational area, is that also approved by the Department of Tourism.

- 15 Give details of the facilities available with them (handling agency located outside)including trained manpower, equipment, etc.
- 16 In case of emergency, please indicate what are the equipments available for emergency lift up/ evacuation of the persons. In respect of emergencies, the following undertaking has to be signed by the Adventure Tour Operator:-

UNDERTAKING:

I, Shri/Smt.undertake the responsibility for operation of this adventure tour (specify details) for efficient handling of the operation and bear the damages (to life or property of dislocation of environment) being the principal agent. I also promise that guidelines for operation of.....(Adventure Sports) as circulated by Department of Tourism will be followed in letter and spirit.

- 17 In case of any change in the scope of activities the same may be brought to the notice of the Department within one month.
- 18 Indicate the type of insurance facilities available with the company whether group or personal.
- 19 Whether porters used for adventure purposes are also experienced and insured.
- 20 Any additional information the organisation would like to give with the reference to the adventure tourism activities undertaken by the firm.
21. Please enclose Demand Draft of Rs. 3000/- for Head Office and Rs.3000/- for each Branch Office as fee for recognition/renewal.

Please mention the D.D. No.....Date Amount

Please mention the D.D. No.....Date Amount

Signature of Proprietor/Partner/Managing Director

Rubber Stamp

Place:

Date:

- NB.** I This application should be submitted in duplicate along with supporting documents.
- II Reference number of Department of Tourism should be quoted if the application is for renewal of recognition

GUIDELINES FOR SAFETY AND RESCUE IN ADVENTURE SPORTS

INTRODUCTION

1.1 An Adventure Tour Operator is one who is engaged in activities related to Adventure Tourism in India, namely, water sports, aero sports, mountaineering and trekking and safaris of various natures etc. In addition to that he may also make arrangements for transport, accommodation etc.

GENERAL GUIDELINES FOR ALL ADVENTURE SPORTS

- 2.1 Every group of persons taking part in adventure sports must be accompanied by a person designated as a "leader".
- 2.2 "Leaders" must possess appropriate qualification and skills as indicated in relevant chapters of this document.
- 2.3 Every person joining a group engaged in adventure sports must receive an introductory training and leaders should be satisfied that they have acquired the skills necessary to participate.
- 2.4 Leaders should have a first aid certification and must be competent to impart first aid training in the use of stretchers.
- 2.5 Leaders should be familiar with search procedures and should brief all group members in these procedures.
- 2.6 All group members must be familiar with the use of radios where these are being used.
- 2.7 Leaders should be familiar with helicopter operations, know how to approach a helicopter and procedures for being winched up and down.
- 2.8 Leaders should be proficient in the use of maps and compasses in any weather by day or night.
- 2.9 Leaders should be satisfied that all members are medically fit to take part in the adventure sports.
- 2.10 Leaders should satisfy themselves that equipment to be used meets all the safety norms for each adventure sport, all inspections have been carried out as recommended by the manufacturer and is fit for use.

- 2.11 Under no circumstances should the capacity rated by the manufacturer of adventure sports equipment be exceeded, any unauthorised modifications except as additional safety measures be carried out or sub standard material used.
- 2.12 Information regarding nature of activity, area of operation, period of activity, possible hazards, persons to be contacted in an emergency and list of members should be given to the concerned safety and rescue committees.
- 2.13 Suitable hand held devices with graded distress signal capabilities should be made available to adventure tourist groups at suitable prices when available in India.
- 2.14 A qualified Doctor should be available on call
- 2.15 Communication facilities such as Mobile Telephone/Walkie Talkie etc. should be available.

GUIDELINES FOR WATER SPORTS

- 3.1 All leaders or guides must possess a valid certificate or licence from a recognised institution or association. They should have an adequate experience in the concerned sport.
- 3.2 All leaders and guides must be good swimmers and should be well trained in water rescue techniques, first-aid & CPR (Cardio pulmonary resuscitation).
- 3.3 A rescue craft should always be in sight or in radio contact of the persons or group engaged in water sports. The rescue craft could be powered or unpowered according to requirements of the sport but it must have a first aid kit, spare life jackets and throw lines/rescue bags. For river sports, a minimum of two crafts (i.e. two rafts or a raft and one/two safety/rescue kayaks) is a must.
- 3.4 All participants should wear suitable buoyancy aids and where necessary protective headgear. Helmets are a must for river sports.
- 3.5 In water sports, where there is a possibility of being thrown in the water, all participants should be swimmers.
- 3.6 All equipment should be inspected by a competent person or the manufacturer once every season or six months, whichever is less.
- 3.7 A log book should be maintained for each craft, which should be a record of usage, inspection, repairs and modifications. A river logbook must be maintained for river rafting operations.

- 3.8 All craft which are away from the base of operations should carry a first-aid kit, emergency equipment and repair kit. They should, where appropriate, carry navigational equipment.
- 3.9 All craft should display of the list of minimum equipment and accessories as recommended by the manufacturer.
- 3.10 The capacity rating of the craft should be prominently displayed so as to be visible to the users along with a warning of potential hazards.
- 3.11 No person should be allowed to participate under the influence of illicit drugs or alcohol.
- 3.12 Incidents and accidents should be immediately reported to the concerned safety committee.
- 3.13 Medical concerns: Those suffering from any serious medical conditions such as a weak heart, epilepsy, back/spinal problems (such as slip disc) & expecting mothers should not be allowed to participate in river sports/adventure sports such as scuba diving etc.
- 3.14 Age limit: The age limit for water sports should be prominently displayed in all literature and also base of operations. For river sports, the age limit is:
 - 14 years & above for all sections
 - 10 years and above on float trips (grade II)Based on the river section/conditions, this can be relaxed by 1 or 2 years by the trip leader.
- 3.15 A liability waiver should be signed by the client prior to the river trip. This should clearly mention the inherent risks involved in the sport.
- 3.16 For river sports, life jackets must be on at all times while on the river. The life-jackets must be fastened properly and have a minimum buoyancy of 8-9 kgs. Appropriate life-jackets should be used. Inflatable life-jackets should not be used on the river.

GUIDELINES FOR AERO SPORTS

- 4.1 All aerosports must be carried out under an instructor or guide holding a valid licence or certificate from a recognised institution, club or association.
- 4.2 All pilots and parachutists must be medically examined and certified fit to participate in aerosports.
- 4.3 Passengers should be medically fit and briefed on emergency procedures.
- 4.4 All aerosports should be undertaken only in day light hours.

- 4.5 Clearance in powered flying, such as microlight and powered hang gliders should be obtained from the concerned air traffic control while flying in controlled airspace. In uncontrolled areas, a responsible person should be available on ground to give take-off and landing clearances.
- 4.6 For unpowered flying, such as hang gliding and paragliding a launch master should be present at the take off site and a landing area safety officer at the landing zone.
- 4.7 First aid equipment alongwith suitable trained person should be available at all times.
- 4.8 All pilots, passengers and parachutists must wear protective helmets.
- 4.9 All aerosports activity must be undertaken when sky is clear of clouds, the surface is in sight and with visibility at least one nautical mile.
- 4.10 No person should be allowed to participate in aero sports under the influence of drugs and alcohol.
- 4.11 Rules for avoiding collision:
(For these rules microlight, powered hang gliders etc. may be read as aircraft)
 1. No aircraft shall be flown in such a way as to create a danger of collision.
 2. Formation flying is not recommended.
 3. All aircraft must avoid passing under, over or in front of another aircraft unless well clear of it.
 4. The lower aircraft always have right of way, except for aircraft in any emergency.
 5. When two aircraft approach each other head on, they should turn on their right
 6. Overtaking is not allowed under any circumstances.
- 4.12 all aircraft, parachutes and airborne equipment must be inspected and certified fit by a competent person on a daily basis.
- 4.13 Log books should be maintained for all aircraft, parachutes and airborne equipment which would record its usage, inspections, modifications and repairs.
- 4.14 Repairs and modifications of airborne aero sports equipment must be carried out with the approval of the manufacturer.
- 4.15 All clubs, associations, government and other bodies offering aero sports facilities must maintain a manual of operation which should be available at the site of the aero sports activity and a copy should be sent to the concerned safety committee for review. This manual should contain standard operating procedures, list of mandatory checks of equipment, details and specifications of equipment and emergency procedures.

GUIDELINES FOR MOUNTAINEERING AND TREKKING

- 5.1 All members of mountaineering expeditions should be adequately qualified for taking part in the sport. Basic course certificate issued by National Mountaineering Institutes should be considered adequate for this purpose.
- 5.2 Leaders of mountaineering expeditions should possess adequate qualifications approved by Indian Mountaineering Foundation.
- 5.3 Members of mountaineering expeditions and trekking groups should be physically fit.
- 5.4 Equipment used for mountaineering and trekking should be UAAI certified or approved by the Indian Mountaineering Foundation.
- 5.5 Rescue equipment, such as ropes, harnesses, pulley systems and portable stretchers must be maintained as a separate kit in a suitable package marked boldly with the words "Rescue equipment".

FORMATION OF SAFETY AND RESCUE COMMITTEE

- 6.1 In addition to having an element of risk, adventure sports are usually undertaken in remote areas, often inaccessible by road. In order to minimise the risks it must be ensured that adequate safety measures are adopted by all agencies conducting adventure sports especially where tourists are involved. Rescue arrangements also have to be speedily put into operation to minimise loss of life and limb in the event of mishaps.
- 6.2 The formation, therefore, of state level committees for safety and rescue of tourists, is essential. The committees should be able to oversee implementation of safety measures and co-ordinate rescue efforts.
- 6.3 The safety and rescue committee should function as a nodal agency for all adventure activities in the state. It should draw its members from the various executive departments such as departments of Tourism, Sports, Police and military authorities and representatives from ATOAL.
- 6.4 Similar committee should be formed at the District level under the district administration.

URGENT SAFETY NOTICES

These notices will be issued subsequently, as and when required, to update these guidelines, based on suggestions and reports received.

I. INSTITUTE OF HOTEL MANAGEMENT

1. Institute of Hotel Management, Catering Technology & Applied Nutrition, Ahmedabad
2. Institute of Hotel Management, Catering Technology & Applied Nutrition, Bangalore
3. Institute of Hotel Management, Catering Technology & Applied Nutrition, Bhopal
4. Institute of Hotel Management, Catering Technology & Applied Nutrition, Bhubaneswar
5. Institute of Hotel Management, Catering Technology & Applied Nutrition, Kolkata
6. Institute of Hotel Management, Catering Technology & Applied Nutrition, Chandigarh
7. Institute of Hotel Management, Catering Technology & Applied Nutrition, Chennai
8. Institute of Hotel Management, Catering Technology & Applied Nutrition, Goa
9. Institute of Hotel Management, Catering Technology & Applied Nutrition, Gurdaspur
10. Institute of Hotel Management, Catering Technology & Applied Nutrition, Guwhati
11. Institute of Hotel Management, Catering Technology & Applied Nutrition, Gwalior
12. Institute of Hotel Management, Catering Technology & Applied Nutrition, Hyderabad
13. Institute of Hotel Management, Catering Technology & Applied Nutrition, Jaipur
14. Institute of Hotel Management, Catering Technology & Applied Nutrition, Lucknow
15. Institute of Hotel Management, Catering Technology & Applied Nutrition, Mumbai
16. Institute of Hotel Management, Catering Technology & Applied Nutrition, New Delhi
17. Institute of Hotel Management, Catering Technology & Applied Nutrition, Patna
18. Institute of Hotel Management, Catering Technology & Applied Nutrition, Shimla
19. Institute of Hotel Management, Catering Technology & Applied Nutrition, Shillong
20. Institute of Hotel Management, Catering Technology & Applied Nutrition, Srinagar
21. Institute of Hotel Management, Catering Technology & Applied Nutrition, Thiruvananthapuram

II. LIST OF FOOD CRAFT INSTITUTES

1. Food Craft Institute
Kidmath Tourist Bunglow
Pushkar Road
Ajmer-305004
2. Food Craft Institute
University Polytechnic Campus
Aligarh-202002
3. Food Craft Institute
Kalamassery
Alwaye-683104
4. Food Craft Institute
Sector 42-D
Chandigarh-60036
5. Food Craft Institute
Lewis Jubilee Sanatorium
Darjeeling-734101
6. Food Craft Institute
Badkal Chowk,
Faridabad-121001
7. Food Craft Institute
Pathrajpur,
Jaipur ((Distt)
Orissa
8. Food Craft Institute of Hospitality Crafts
Govt. of Pondicherry
Uppalam Road
Pondicherry-6050011
9. Food Craft Institute
Thuvakkudi
Tiruchirappalli-620015
10. Food Craft Institute
Chetak Circle
Behind Luv Kush Stadium
Udaipur-313001
11. Food Craft Institute
Visakha Valley Schhol Campus
Visakhapatnam-530040

Source : National Council for Hotel Management.