

Indian Tourism Industry

Growth and Development

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ABSTRACT

Tourism is now well recognised as an engine of growth in the various economies in the world. Several countries have transformed their economies by developing their tourism potential. Tourism is the fastest growing industry in the world. According to the World Travel and Tourism Council (WTTC) tourism is the world's largest industry generating 12% of the global gross national product and it employs around 200 million people worldwide (WTTC, 1995). Worldwide tourism is ranked second highest revenue-generating industry next to the oil industry. This article studies the growth of foreign tourist arrivals and foreign exchange earnings into India through the Indian tourism industry. It also examines the share of the Indian Tourism Industry in the World in general and especially the Asia Pacific region. Tourism has been pivotal in social progress as well as an important vehicle of widening socioeconomic and cultural contacts throughout human history. The article suggests measures for increasing the growth of foreign tourist arrivals and foreign exchange earnings into India via tourism. It is evident from this study that the Indian Tourism Industry is growing significantly each year at a rate of 7% in foreign tourist arrivals. In addition, India is currently experiencing a steep jump in its position in terms of tourism growth and has moved from its recent 50th global position to 40th position in tourist receipts.

INTRODUCTION

Tourism has emerged as an instrument for employment generation, poverty alleviation and sustainable human development. Tourism promotes international understanding and gives support to local handicrafts and cultural activities. It is an important segment of the country's economy, especially in terms of its contribution towards foreign exchange earnings, generation of additional income and creation of employment opportunities. With rapid advances in Science & Technology, tourism has acquired the status of an industry in all industrialized countries. The high influx of foreign tourist traffic has accelerated demand for certain economic production and distribution activities. Tourism has emerged as an industry next in importance only to Information Technology industry in the Services sector.

Tourism is currently the world's largest industry and the fastest growing sector of the market. Tourism is usually viewed as being multidimensional, possessing physical, social, cultural, economic and political characteristics. Tourism facilitates business contacts, widens markets and helps diffusion of growth impulses across territories to promote broad based employment and income generation. Investment in tourist infrastructure adds to economic growth, catalyses generation of income and employment, which in turn, leads to further growth in demand for tourism and stimulates subsequent rounds of investment in a virtuous circle. Tourist expenditure generates multiple effects with extensive outreach along its value chain. Adding to the demand for a

variety of goods and services, tourism offers potential to exploit synergies across a large number of sectors such as agriculture, horticulture, poultry, handicrafts, transport, construction - the sectors, where growth of income has favourable impact on poverty alleviation. The demand for travel and tourism in India is expected to grow by 8.2 per cent between 2010 and 2015, placing India at the third position in the world. It is estimated that 5% of total tourist arrival figures to rural India and there has been an 8 to 10 % increase in arrivals on an average to Rural Tourism sites after the launch of the rural tourism scheme.

NEED FOR THE STUDY

Tourism is an important sector of the economy and contributes significantly in the country's GDP as well as Foreign Exchange Earnings (FEE). With its backward and forward linkages with other sectors of the economy, like transport, construction, handicrafts, manufacturing, horticulture, agriculture, etc., tourism has the potential to not only be the economy driver, but also become an effective tool for poverty alleviation and ensuring growth with equity. In the year 2010, the tourism sector witnessed substantial growth as compared to 2009. The Foreign Tourist Arrivals (FTA) in India during 2010 were 5.58 million as compared to the FTAs of 5.17 million during 2009, showing a growth of 8.1%. The growth rate during 2009 over 2008 was (-) 2.2%. FEE from tourism during 2010 were Rs. 64889 crore as compared to ' Rs. 54960 crore during 2009, registering a growth rate of 18.1%. The growth rate in FEE from tourism during 2009 over 2008 was 8.3%. Tourism Sector is a major generator of employment. As a highly labour intensive activity, tourism and tourism support activities create a high proportion of employment and career opportunities for low skilled and semi-skilled workers, particularly for poor, female and young workers. Women make up 70% of the labour force in tourism sector and half of all tourism workers are 25 years or under. The tourism sector can be

an important source of employment for many of the unemployed youth and consequently reduces the poverty in the society (UNCTAD 2010).

REVIEW OF LITERATURE

The tourism industry has become an important sector to both developed and developing countries, including India. Today, statistics on tourist arrivals significantly contribute to the impact research studies, destination marketing, destination policy, planning and management (DPPM). Many scholars think that The 'Tourism Industry' is a 'market' (tourist-needs), as opposed to 'product' (tourism facilities) driven industry. Therefore the market needs and demands need to be understood and taken into account prior to providing recommendations for product development support (Kwazulu-Natal Tourism Authority, 2002). Mathieson and Wall (1982) suggested that tourism makes its most valuable economic impacts in the early phase of development in a Third World country, and will diminish in significance with the coming of industrialization. Hence, they also warned against over-reliance on tourism and urged that profits from it be channeled to other sectors of the economy. They also stressed that although such comments are accurate for some countries, there is no doubt that many more will see little economic development of this kind and will have to rely on tourism for as long as they can. Tourism is the most attractive and the fastest growing industry in the world. According to the World Travel and Tourism Council (WTTC), tourism in 2005 turned out to be the second largest industry, accounted for 3.8 per cent of global Gross Domestic Product - GDP (Rosli & Azhar, 2007). Elliott and Mann (2005) stressed that tourism's role in development has evolved significantly, providing not just foreign exchange, economic growth and employment, but also opportunity for host community participation in biodiversity conservation, urban growth, infrastructure overhaul and planning, rural development, environmental restoration, coastal

protection and cultural heritage preservation. In a broader perspective, tourism has a direct impact not only on economic development as argued by Hall (1995), but also on social, environmental and ethical developments of a destination country (Mbaiwa, 2003). Singh R.K. (2009) has said that the broad objectives of future tourism development in India should be oriented to an accorded status in the national agenda for action and its eco-friendly sustainable development. The target of tourist arrivals to/in India revolve around its importance of creating awareness and people's participation, improving the quality of services, identifying the needs for a new thrust in image building, improving organizational capabilities and looking for other areas of resource generation.

OBJECTIVES OF THE STUDY

1. To study the Economic Effects of Global Tourism and Travel Sector.
2. To study the Contribution of Travel and Tourism Sector in India.
3. To study the Investment Scenario of Travel and Tourism Sector in Asia.
4. To study the growth of foreign tourist arrivals, foreign exchange earnings in India.
5. To ascertain the share of Indian Tourism Industry in relation to the rest of the World and especially the Asian and Pacific region.
6. To suggest measures for increasing the growth of foreign tourist arrivals and to increase foreign exchange earnings within India as a direct result of tourism.

METHODOLOGY

In order to diagnose the present trends and progress in tourism in India in context with globalisation, the present paper intend to make use of the secondary source of the data collected from various government sources such as the Ministry of Tourism, the Government of India, the World Tourism Organization and other relevant websites. The study concerned the growth and

stability of Indian tourism. Parameters like foreign tourist arrivals into India, foreign exchange earnings, domestic tourist visits within India and Indian tourists going abroad were all carefully analyzed. The study covered the years 1997 to 2010 & upto June 2011

FRAMEWORK OF ANALYSIS

Tourism is one economic sector in India that has the potential to grow at a high rate and ensure consequential development of the infrastructure at the destinations. It has the capacity to capitalize on the country's success in the services sector and provide sustainable models of growth. Tourism is now well recognised as an engine of growth in the various economies in the world. Several countries have transformed their economies by developing their tourism potential. Tourism has great capacity to generate large-scale employment and additional income sources to the skilled and unskilled. Following parameters have been identified to measure the importance, growth and development of tourism in India :

1. Economic Effects of Global Tourism and Travel Sector (WTTC).
2. Contribution of Travel and Tourism Sector in India (WTTC).
3. Investment Scenario of Travel and Tourism Sector in Asia (WTTC).
4. Foreign Tourist Arrivals (FTAs) in India, 1997-2011.
5. Foreign Exchange Earnings (FEE) (in US\$ Million) from Tourism in India, 1997-2011.
6. Foreign Exchange Earnings (FEE) (in Rs Crore) from Tourism in India, 1997-2011.
7. Top 10 Source Countries for Foreign Tourist Arrivals (FTAs) in India in 2010.
8. Number of Domestic Tourist Visits to all States/UTs in India, 1997-2010.
9. Share of Top 10 States/UTs of India in Number of Domestic Tourist Visits in 2010.
10. Share of India in International Tourist Arrivals in World, and Asia & the Pacific Region, 1997-2010.

Table-1
Economic Effects of Global Tourism and Travel Sector (WTTC)

World	2005	2006	2007	2008	2009	2010
Travel & Tourism Direct Contribution to GDP						
In US\$	1377.85	1471.67	1647.00	1755.23	1641.27	1757.54
2011Price(US\$ bn)	1692.25	1732.33	1787.90	1763.93	1711.85	1768.77
Real growth	0.4	2.4	2.8	-1.5	-3.4	3.2
% Share	3	2.9	2.9	2.8	2.8	2.8
Travel & Tourism Total Contribution to GDP						
In US\$	4415.35	4768.24	5366.87	5807.13	5408.68	5701.95
2011Price(US\$ bn)	5424.19	5618.80	5853.46	5852.70	5652.89	5754.96
Real growth	3.3	3.6	3.6	0.0	-3.9	1.7
% Share	9.6	9.6	9.6	9.4	9.3	9.0
Travel & Tourism Direct Contribution to Employment						
In US\$	1.1	3.3	-0.6	-0.2	-2.3	0.9
% Share	3.5	3.5	3.4	3.4	3.3	3.3
In thousands	95307.4	98473.9	97794.0	97527.6	95260.1	96130.5
Travel & Tourism Total Contribution to Employment						
In US\$	0.6	2.7	3.1	-4	-3.1	-0.8
% Share	9.4	9.5	9.6	9.1	8.8	8.6
In thousands	256508	263553	271808	260838	252720	250565

Source: IITTM- ICC Report Travel and Tourism Industry in India, Ministry of Tourism, Govt. of India

Tourism has emerged as one of the fastest growing industries in the world and registers its importance in not only developing the country economically but also in providing a source of income, employment, and it also brings needed infrastructural improvements which may help in regional development. With passage of time, the travel and tourism industry has evolved to become one of the largest and most dynamic industries of the global economy. A WTTC study has estimated in 2010 that the contribution of travel and tourism

to the world GDP was to the tune of 9%, whereas, its total employment effect was more than 235 million jobs, representing 8% of global employment. Further, the employment effect of international tourism appears to be optimistic in the medium to long-term. According to the UNWTO forecasts, the sector is expected to provide nearly 296 million jobs by 2019 given that there would be sustained growth of global tourist arrivals and the major economies maintain its momentum.

Table-2
Contribution of Travel and Tourism Sector in India (WTTC)

India	2011			2021		
	INR bn	% of total	Growth	INR bn	% of total	Growth
Direct Contribution to GDP	1570.5	1.9	8.7	3414.8	2.0	8.1
Total Contribution to GDP	3680.4	4.5	8.7	8523.1	4.9	8.8
Direct contribution to Employment	21931	5.0	2.4	30439	5.2	2.0
Total contribution to Employment	37655	7.5	2.4	47460	8.1	2.3
Visitor export	670.6	3.8	5.7	1344.7	2.1	7.1
Domestic Spending	3509.8	4.3	9.1	7758.3	4.4	8.3
Leisure Spending	3003.0	3.7	7.5	6332.8	3.6	7.7
Business Spending	1196.6	1.5	11.1	2791.8	1.6	8.8
Capital Investment	1233.0	4.7	12.2	1827.5	4.8	8.7

Source: IITTM- ICC Report Travel and Tourism Industry in India, Ministry of Tourism, Govt. of India

The table – 2 reveals that an emerging tourism demand scenario of this nature seems to suggest that 2011 may benefit India economically much better if one was to go by the WTTC (World Travel & Tourism Council) figures. For, direct contribution of tourism and travel to India’s GDP at constant prices for 2011 is estimated to be about 1.9% or Rs. 1570.5 billion and the same might reach 2% by 2021. Perhaps, total economic impacts of the sector is estimated to be much higher at Rs.3680.4 billion (4.5% of GDP) and Rs. 8523.1 billion (4.9%) respectively during this period. As regards to employment generation in 2011, the sectors’ direct contribution worked out to be 5% and the total effects- direct and indirect together- stand at 7.5% in the country’s total employment pie. Respective figures might rise to 5.2% and 8.1% by 2021 and such prospects need to be taken as an important indicator for concerted policy interventions and programming for tourism sector. Because, as already established, the sector has a key role to play in the eradication of poverty and development by way of creating employment and income opportunities for millions of the marginal and less empowered sections across the country.

Table-3
Investment Scenario of Travel and Tourism Sector in Asia (WTTC)

Rank	Travel & Tourism Investment	2011 (US\$ bn)
2	China	95.80
4	India	26.70
14	Indonesia	12.20
18	Thailand	8.63
26	Malaysia	4.89
28	Vietnam	4.59
	World Average	3.60
53	Pakistan	1.57
75	Sri Lanka	0.58
79	Bangladesh	0.47
100	Cambodia	0.26

Source: IITTM- ICC Report Travel and Tourism Industry in India, Ministry of Tourism, Govt. of India

The table – 3 reveals that India ranks 4th in terms of travel and tourism investment in 2011 with a

total of USD 26.7 billion. The Table would further suggest that in terms of investment, India is much ahead of most countries in the Asian region. Many factors can be attributed to this like a consistently growing economy, fast expanding travel and tourism demand and supply, dynamic business environment, global integration and so on.

TABLE- 4
Foreign Tourist Arrivals (FTAs) in India, 1997-2011

Year	FTAs in India (In Million)	Percentage(%) change over the previous year
1997	2.37	3.8
1998	2.36	-0.7
1999	2.48	5.2
2000	2.65	6.7
2001	2.54	-4.2
2002	2.38	-6.2
2003	2.73	14.3
2004	3.46	26.8
2005	3.92	13.3
2006	4.45	13.5
2007	5.08	14.3
2008	5.28	4.0
2009	5.17	-2.2
2010	5.58	8.1
2011(Jan -June(p))	2.92	10.9@

Source : Ministry of Tourism GoI July 2011

The perusal of Table – 4 reveals that the percentage change in FTAs in India during 1997 shows at 3.8 and decrease to -6.0 during 2002. Further it increase to 26.8% in the year 2004. During 2011 from January to June this percentage shown at 10.9%. But in relative terms, the percentage change in tourist arrivals had showed an increasing annual rate of growth of 7%. Between the years 2000 and 2010 the tourist arrivals into India barring the years 2000,2001 and 2002 and 2009 showed an increasing trend in absolute terms and showing a negative

(-0.02)% change over the previous year in 2009. This clearly presents foreign tourist arrivals into India. The 'quantum leap' of foreign tourist arrivals

in India has increased. The Tourism Industry has been emerging as a leading and lucrative global sector, and this applies to India as well.

TABLE- 5
Foreign Exchange Earnings (FEE) (in US\$ Million) & (in Rs Crore) from Tourism in India, 1997-2011

Year	FEE from Tourism in India (inUS\$ Million)	Percentage (% change over the previous year)	FEE from Tourism in India (in Rs Crore)	Percentage (% change over the previous year)
1997	2889	2.0	10511	4.6
1998	2948	2.0	12150	15.6
1999	3009	2.1	12951	6.6
2000	3460	15.0	15626	20.7
2001	3198	-7.6	15083	-3.5
2002	3103	-3.0	15064	-0.1
2003	4463	43.8	20729	37.6
2004	6170	38.2	27944	34.8
2005	7493	21.4	33123	18.5
2006	8634	15.2	39025	17.8
2007	10729	24.3	44360	13.7
2008	11832	10.3	51294	15.6
2009	11394	-3.7	54960	7.1
2010	14193	24.6	64889	18.1
2011(Jan-June(p)	7811	14.2@	35163	12.1@

Source : Ministry of Tourism, Gol, July 2011

The perusal of Table – 5 indicates that tourism continues to play an important role as foreign exchange earner for the country. In 2010, foreign exchange earnings (FEE) from the tourism were US \$ 14.19 billion as compared to US \$ 11.39 billion in 2009, registering a growth of 24.6%. The tourism industry has become a part or an appendage of the International trade and exchange system. Every country, big or small, rich or poor, wants its due share of the world trade and foreign exchange earnings only to maintain its balance of

trade and payments. Table – 5 depicts that the FEE in terms of US \$ and percentage change during the period has shown an increase from 2.0 % to 15% in the year 2000. Further it increases up to 43% during 2003. Data reveals that the FEE in terms of change in percentage over previous year found at 14.2% during June 2011. It is clear that the amount of foreign exchange earnings from the tourism industry in India has jumped up by a considerable margin.

TABLE -6
Top 10 Source Countries for Foreign Tourist Arrivals (FTAs) in India in 2010

Sl No	Source Country	FTAs (in million)	Percentage (%) share
1	USA	0.916	16.40
2	UK	0.755	13.52
3	Bangladesh	0.381	6.82
4	Canada	0.240	4.30
5	Germany	0.224	4.01
6	Sri Lanka	0.219	3.92
7	France	0.128	3.90
8	Japan	0.165	2.95
9	Australia	0.164	2.94
10	Malaysia	0.160	2.87
Total of Top countries		3.442	61.64
Others		2.142	38.36
All countries		5.584	100.00

Source : Ministry of Tourism, Gol, July 2011

Tourism is now the number one industry in earning valuable foreign exchange for the central exchequer. The table reveals that the majority of the tourist arrivals are from the USA followed by UK and Bangladesh. Malaysia stands at 10th rank in terms of FTAs in India with 2.87%. FTAs of top countries found at 61.64% and others at 38.36%.

TABLE- 7
Number of Domestic Tourist Visits to all States/UTs in India, 1997-2010

Year	No of Domestic Tourist Visits (in Million) to States/UTs	Percentage(% change over the previous year)
1997	159.88	14.1
1998	168.20	5.2
1999	190.67	13.4
2000	220.11	15.4
2001	236.47	7.4
2002	269.60	14.0
2003	309.04	14.6
2004	366.27	18.5
2005	391.95	7.0
2006	462.31	18.0
2007	526.43	13.9

2008	563.03	7.0
2009	668.80	18.8
2010 (P)	740.21	10.7

Source : Ministry of Tourism, Gol, July 2011

Domestic tourism plays a vital role in achieving the national objectives of promoting social and cultural cohesion and national integration. Its contribution to generation of employment is very high. With the increase in income levels and emergence of a powerful middle class, the potential for domestic tourism has grown substantially during the last few years.

The maximum instability was observed in the number of domestic tourist visits in India. The table indicating the number of Domestic tourist visits to all the state reveals that, the percentage change over the previous year during 1997 was at 14.1% and this increase to 15.4% in the year 2000. The table – 7 also indicates that this percentage changes during 2007 to 13.9 and further increase to 18.8% indicating the fluctuation even in domestic tourists.

TABLE- 8
Share of Top 10 States/UTs of India in Number of Domestic Tourist Visits in 2010

Rank	State/UTs	Domestic Tourist Visit in 2010(P)	
		Number	% Share
1	Andhra Pradesh	155789584	21.0
2	Uttar Pradesh	144754977	19.6
3	Tamil Nadu	111637104	15.1
4	Maharashtra	48465492	6.5
5	Karnataka	38202077	5.2
6	Madhya Pradesh	38079595	5.1
7	Uttarakhand	30206030	4.1
8	Rajasthan	25543877	3.5
9	West Bangal	21072324	2.8
10	Gujarat	18861296	2.5
Total of 10 States		632612356	85.5
Others		107601941	14.5
Total		740214297	100.0

Source : Ministry of Tourism, Gol, July 2011

Table – 8 indicates that Andhra Pradesh shows highest percentage share in Domestic tourists

which is at 21.0% followed by Uttar Pradesh at 19.6%.Gujarat state has only 2.5%. The overall percentage was at 85.5% for all the top 10 states and other are at 14.5% The number of international tourist arrivals into India has increased. Maharashtra state found highest in terms of attracting Foreign tourists at 28.5% and Goa state at 2.5%.The total of all 10 state attracting foreign tourists is at 90.3% and other states is at 9.7%.

TABLE- 9
Share of India in International Tourist Arrivals in World, and Asia & the Pacific Region, 1997-2010

Year	International Tourist Arrivals (in million)		FTAs in India (in million)	Percentage Share (%) share and Rank of India in world		Percentage Share (%) share & Rank of India in Asia and the Pacific	
	World	Asia and the Pacific		% Share	Rank	% Share	Rank
1997	593.0	89.0	2.37	0.40	47 th	2.67	—
1998	611.0	88.3	2.36	0.39	46 th	2.67	—
1999	633.8	97.6	2.48	0.39	50 th	2.54	—
2000	683.3	109.3	2.65	0.39	51 st	2.42	11 th
2001	683.4	114.5	2.54	0.37	54 th	2.22	12 th
2002	703.2	123.4	2.38	0.34	51 st	1.93	12 th
2003	691.0	111.9	2.37	0.39	44 th	2.44	11 th
2004	762.0	143.4	3.46	0.45	43 rd	2.41	11 th
2005	803.4	154.6	3.92	0.49	44 th	2.53	11 th
2006	846.0	166.0	4.45	0.53	44 th	2.58	11 th
2007	894.0	182.0	5.08	0.57	41 st	2.79	11 th
2008	917.0	184.1	5.28	0.58	41 st	2.87	11 th
2009	882.0	180.9	5.17	0.59	41 st	2.86	11 th
2010(P)	940.0	203.8	5.58	0.59	40 th	2.74	11 th

Source : Ministry of Tourism, Gol, July 2011

The perusal of above table – 9 reveals that the annual growth rate of foreign tourist arrivals into India. Foreign exchange earnings through foreign tourists shows a significant increase. The table on Share of India in International Tourist Arrivals in World, and Asia & the Pacific Region indicates that India Rank 11th in terms of percentage share in pacific and 40th Rank in the world and its share found to between 0.40% to 0.59 % during the same period. Though, India's share in the world tourist arrivals was very meager compared to the Asia Pacific region, its share in the world tourist arrivals has increased from 0.39% in 2000 to 0.59% in 2010 and it accounts for an impressive share of 2.74 % of foreign tourist arrivals in the Asia and the Pacific Region.

CONCLUSION

Tourism has significantly increased its scope and opportunity in India. Tourism is presently India's third largest export industry after readymade garments and gem & jewellery. The most significant feature of the tourism industry is its capacity to generate large scale employment opportunities particularly in remote and backward areas. It offers enormous potential for economic utilization of the natural attractions like landscape, mountains, beaches, rivers etc., which would otherwise remain either idle or underutilized. Tourism, being one of the largest industries, plays a key role in achieving the socio-economic goals of the development plans of a nation. It is an important service-oriented sector which has made

rapid strides globally in terms of gross revenue and foreign exchange earnings. It is a composite of service providers, both public and private, which includes travel agents and tour operators; air, rail and sea transportation operators; guides; owners of hotels, guest houses and inns, restaurants and shops; etc. The tourism industry provides incentives to foster the quality of environment, generates more employment opportunities particularly in remote and backward areas) as well as develops necessary infrastructure facilities like roads, telecom and medical services, in the economy.

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