



Hotel industry since last two decades in India: A research outline

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Abstract

Tourism has now become a significant industry in India. It is a sun rise industry, an employment generator, a significant source of foreign exchange for the country. Tourism in India is the third largest foreign exchange earner of the country. Further, the Travel and Tourism Competitiveness Report by World Economic Forum, has ranked India at the sixth place in tourism and hospitality. The tourism and hospitality sector is among the top 10 sectors in India to attract the highest Foreign Direct Investment (FDI). According to the data released by Department of Industrial Policy and Promotion (DIPP), the hotel and tourism sector attracted around US\$ 10.6 billion of FDI between April 2000 and September 2017. The government has initiated 'Project Mausam' under which it has proposed to establish cross cultural linkages and to revive historic maritime cultural and economic ties with 39 Indian Ocean countries. Further, since April 2017, the e-tourist visa facility has been made available to citizen 161 countries. The government has introduced e-Tourist Visa (e-TV) for 161 countries as against the earlier coverage of 113 countries. Due to the increase in tourism with rising foreign and domestic tourists, hotel sector is bound to grow. There is an emergence of budget hotels in India to cater to much of the population who seek affordable stay.

Keywords: hotel, hospitality, tourism, growth, cuisine, customer, trends, demand, market

Introduction

This research survey attempts to analyse the steady transition, spread and improvements in hospitality industry and how it has remained complementary to tourism. It will also highlight hospitality's initiatives in promoting tourism. In the last two decades, tourism and hospitality sectors have seen remarkable, many-sided improvements in India, through the contribution by private sector and the government help.

The Ministry has set up a Hospitality Development and Promotion Board, which monitors and facilitates hotel project approvals. India has the potential to become one of the major tourist destinations in the world and the tourist demand grows at 10.1% annually, according to the World Travel and Tourism Council (WTTC). Department of tourism is trying hard to create an unparalleled tourist destination in India and most of this responsibility and achievement rests on hospitality sector.

Many kinds of hospitality-linked tourisms are available in India, including medical, healthcare, and adventure, heritage tourism, and ecotourism, rural and religious tourisms. Hospitable industry can provide the goodness of naturopathy, yoga, siddha, ayurveda, spiritual philosophy, Buddhism, Jainism and wellness destinations. India has one of the richest cultural, religious, historical and political heritage tourism, in the form of caves, temples, mandirs, forts, gardens, monuments, museums, art galleries and palaces that reflect not only medieval, but also ancient Indian heritage and all these could be converted into successful tourist hospitality sites.

Human habitats

The word habitat comes from Ecology and here, it covers all

spaces where humans can reside, places of work, entertainment, study, internship, urban and rural environment, social environment, homes and surrounding buildings.

Inns

Inns were the forerunners of today's hotels and lodgings in the West. In India, there existed various versions of these establishments and even today, they could be seen all over the country. These provide lodging, food, for the travellers at an ordinary rate and such establishments mainly exist near the highways or in the countryside, where travellers are expected. Some of them provide stabling and fodder to horses and other animals used for travelling.

During the 1800s the inn played a major role in the growing transportation system of England. Industry was on the rise and people were traveling more in order to keep and maintain business. 'The English Inn was considered an important part of English infrastructure as it helped maintain a smooth flow of travel throughout the country.

Motel

Motel word is not very popular in the Eastern world as in Western. This word was coined to give the meaning that motors could be parked in these hotels and they are Motor hotels. Usually owned individually, there are examples of motel chains too.

As large highway systems began to be developed in the 1920s, long-distance road journeys became more common, and the need for inexpensive, easily accessible overnight accommodation sites close to the main routes led to the growth of the motel concept.

Bed and breakfast

This is mainly an overnight lodging in small establishments that provides an overnight stay with a breakfast in the morning for mostly unattached busy travellers. Traditionally such establishments do not offer other meals of the day. Family homes and respectable units usually offer this kind of service, if the building is big enough to offer the service for a few. They use the home cooks for breakfast work and this kind of establishments sustain the family very adequately. Mostly, the breakfast price is included in the room rent and looks complimentary. They provide private bathrooms and private bedrooms, part of the earlier huge family accommodation. These usually provide a second income and either all family members are involved in the work, with a few hired staff.

Boutique hotel

In India, there are Indian versions of boutique hotels, although they are not called so. These are smaller establishments, with very intimate surroundings, undisturbed and luxurious. But, they are not called boutique hotels in India, but called so in the United States and United Kingdom.

Eco hotel

These are ordinary hotels with additional environmental improvements. They would have considered most changes to lessen the impact on the surrounding environments. They are connected with green living and are environmentally responsible lodgings. Mostly they are situated among the flourishing ecosystems, like jungles or near estuaries and they would have used the available material for building and this would extend to menu too, having used the readily available food.

Hostel

They offer a safe and sociable atmosphere within a small budget and offer basic amenities like either a proper bed or a bunk bed in a dormitory with share bathroom and lounge. Mostly hostels for single sex accommodation. For a higher price, it is possible to find private rooms. These are far cheaper than other providers and due to numbers or security personnel, they are safer too.

Some hostels might cater to people in need like drug addicts under rehabilitation, nurses, defendants out on bail etc. Sometimes, these are run by societies, government agencies or charities etc. School and college hostels are run by the institutions themselves. In the West, hostels mainly provide accommodation and food for travellers and backpackers.

Apartment hotel

In earlier days, these hotels were also called apartel or apart-hotel. It could be an apartment complex with booking facilities and other hotel services provided. In such hotels, there are no fixed rules and occupants can leave whenever they decide to do so. These custom-built apartments are fully fitted like a mini house and the length of stay could be extended or shortened.

Guest house

Guest houses exist in almost all the countries of the world. They could resemble inns, bed and breakfasts or hostels, or

could have most of their features. They are very cheap compared to hotels and the owners usually lived on the premises, overseeing and directing the day-to-day activities. In some countries that are not advanced in tourism and hospitality, guest houses are the only kind of accommodation available for rare visitors. Unlike inns and hotels, guest houses mostly do not have a full-time staff. In the West, they could be family owned, just like Bed and Breakfast.

Homestay

Home stays are very different from all the above and spreading into the rural and remote regions in India, although it is not a new concept in India. When students shift for studying purpose either inside or out of India, home stays are used by renting rooms from local families. It is sometimes used by people who wish to improve their language skills and become familiar with the local lifestyle. Some countries encourage homestay as a means of developing their tourism industry.

Hosting a home stay participant allows the host family to earn an income. Students tend to arrange a homestay with their school or educational institution, but they can informally arrange one through social connections and private agencies that connect students with hosts families, usually for a nominal fee. Home stay opportunities range from a complete family experience to basic room rental. The goal of a home stay is for the student to be immersed in their hosts culture. The student may participate in family activities, including dining out, going to amusement parks, camping, and traveling. The visiting student may be expected to pay a portion of the activity-related costs, such as tickets, parking, gas and travel expenses.

In many home stays, families act as cross-cultural advisers, helping the students understand and adjust to their new culture. In other home stays, students may simply rent a room within a private home, with minimal supervision from the host. In working home stay agreements, the student is expected to perform duties such as yard work, farm work, babysitting, or maid services.

Gradual growth of hospitality sector in India

Indian society, taking into consideration the seriousness of hospitality in real life, had been a haven to domestic tourism from the beginning. It will not be wrong if we say that domestic tourism is as old as Indian society itself. In the last two decades, tourism and hospitality industry in India has grown beyond expectations. From the available statistics, it can be seen that domestic tourism has shown an annual growth 12.8%, from 64 million in 1990 to 167 million in 1998.

This definitely does not mean that tourism and hospitality sectors evolved slowly earlier. In fact, we have very impressive inbound tourism records since Independence. It was 17,000 in 1951, and from there, it rose to 2.36 million in 1998, resulting in a phenomenal rate of growth of 17% in tourism receipts jumping from Rupees 7.7 crores in 1951 to Rs.11, 540 core in 1998.

The growing Indian hospitality industry

The earlier setbacks in global tourism have strengthened the

Department of Tourism's resolve to promote India's tourism through aggressive marketing strategies through its campaign 'Incredible India'.

The 'marketing mantra' for the Department of Tourism is to position India as a global brand to take advantage of the burgeoning global travel and trade and the vast untapped potential of India as a destination. India currently has over 200,000 hotel rooms spread across hotel categories and guest-houses and is still facing a shortfall of over 100,000 rooms (source: FHRAD). The country is witnessing an unprecedented growth in hotel constructions and will be adding almost 114,000 hotel guest rooms to its inventory over the next five years. (source: HVS) (in the above reference). —In the present scenario, hospitality industry has projected an increase in the supply of hotel rooms to meet the rising demand in the coming three to four years.

Earlier idea of hospitality of a room with a bed, a rare cupboard, a small writing table with a chair and a tiny bathroom with a washstand has been extinct for a long time now and increasingly modern facilities have overtaken that space. Even facilities like en-suite bathrooms and air conditioning or heating according to the prevailing weather, mini bar, telephone, mini refrigerator, twin sinks, bath robes, pillow menus etc. are becoming regular requirements these days. Jacuzzi bathtubs, swimming pools, heated and unheated, fitness centres, business centres, conference facilities, personal staff on call, function services and always available child care facilities are accepted today as normal.

Inbound Tourism

The growth of inbound tourism since Independence has been quite impressive. It was just around 17 thousand in 1951. From this level it rose to 2.36 million in 1998. Tourism receipts on the other hand have grown at a phenomenal rate of 17 per cent to Rs.11,540 crore in 1998 from Rs.7.7 crore in 1951.

Recent decades

But it was only after the 80's that tourism connected activities gained momentum. The Government took several significant steps. A National Policy on tourism was announced in 1982. Later in 1988, the National Committee on Tourism formulated a comprehensive plan for achieving a sustainable growth in tourism. In 1992, a National Action Plan was prepared and in 1996 the National Strategy for Promotion of Tourism was drafted. In 1997, a draft new tourism policy in tune with the economic policies of the Government and the trends in tourism development was published for public debate. The draft policy is now under revision. The proposed policy recognises the roles of Central and State governments, public sector undertakings and the private sector in the development of tourism.

The need for involvement of Panchayat Raj institutions, local bodies, non-governmental organisations and the local youth in the creation of tourism facilities has also been recognised. Even though these are named as Tourism-connected, Hospitality has been an undivided part in the earlier days. It did not exist separately and only in the recent decades, Hospitality has been treated as a separate and independent entity.

Structure of the hotel industry

It is optimistically expected that there will be further development also of heritage and boutique hotels in the future. Many royal palaces in Rajasthan and other States are converted into mega hotels that promise royal experience and opulence of a bygone era to visitors.

Adventure and forest tourism has been encouraged and patronised by younger groups. Many a jungle lodges of erstwhile rulers are being used for this purpose. On the tourism front, the central and state governments are aggressively pursuing the tourism agenda, marketing the beaches of Goa and Kerala, so observes Devendra.

Various kinds of units

In every country, there are various kinds of hospitality units according to their culture and weather. It is the same in India too and these units have taken the modern version of their earlier history.

Heritage hotels

Visitors can see the country's old glory and heritage in these units. Invariably, they are palaces and royal abodes of earlier rulers and show the history of India. When people stay in such hotels, they become part of Indian history and this is a romanticised tourism. Mostly, these could be seen in the earlier capitals of kingdoms like Mysore, Chittor, Mewad, Udayapur, Delhi, Madhya Pradesh, Uttar Pradesh and many other places.

Luxury hotels

These are fine modern places with almost all the amenities, dining places, auditoriums, conference halls, cinema halls, swimming pools, pool-side facilities, sports amenities, gyms, reception rooms, plus apartments, opulent rooms and mostly cater to State Heads, business leaders etc.

Resorts

In the last two decades, Resorts have sprung up all over the country, sea side resorts, hill station resorts, nature resorts etc. Mostly, they are mostly found in places of scenic beauty and secluded tourist destinations. They provide solitude required for creativity. They also provide adventure tourism, wild tourism, wild life viewing, sea life viewing, sea sports and are equally suitable for family participation, having many attractions for children and teens.

Budget hotels

These are simpler units with no show of riches; but, provide homely comforts and are very efficient because they cater to more people of middle class or higher middle class, people travelling for various purposes like religious, spiritual, medical, and sightseeing. They also cater to professions like artists, creative tourists, writers, photographers etc. These can be seen everywhere, more so, near natural parks.

The growing industry

Experts in the field believe that along with tourism, Indian hospitality sector will grow at tremendous, unprecedented speed in the coming years. Indian hotels usually experience high occupancy even during off-peak season. India being a

country of varied cultures and Weather, lean season does not last long. International business is enhancing in India and hospitality sector is the beneficiary.

Hotel chains in the last two decades have sprung up everywhere with an upward trend. International tourists visiting India has been experiencing 15% increase since 2006, providing nearly 14% and more increase in the foreign exchange. Indian middleclass has been experiencing high income in recent years and is yearning to experience all that had been denied to them earlier. This trend in domestic travel for both personal and business reasons is directly benefitting Indian Hospitality sector.

State initiatives

The Government has allowed 100 per cent FDI under the automatic route in the hotel and tourism related industry, according to the Consolidated FDI Policy, released by DIPP, Ministry of Commerce and Industry, Government of India.

The Ministry of Tourism, Government of India (IBID), has signed bilateral agreements/memoranda of understanding (MoU) with 47 countries, a tripartite agreement between India, Brazil and South Africa and a multilateral agreement between India and Member States of Association of South East Asian Nations (ASEAN) for cooperation in the tourism sector.

The Ministry of Tourism as part of its promotional activities releases campaigns in the international and domestic markets under the Incredible India brand-line, to promote various tourism destinations and products of India. The budget allocated for the Domestic Promotion & Publicity and Overseas Promotion & Publicity including Marketing Development stood at Rs 110 crore (US\$ 17.73 million) and Rs 350 crore (US\$ 56.41 million) for the FY 2013-14.

The ministry has set up a Hospitality Development and Promotion Board, which will monitor and facilitate hotel project approvals. The allocation for Ministry of Tourism in the Union Budget 2013-14 has been increased by Rs 87.66 crore (US\$ 14.13 million) to Rs 1,297.66 crore (US\$ 209.30 million). In a major boost to the North- East tourism sector, Mr. K Chiranjeevi, Union Minister for Tourism, Government of India, has approved Central Finance Assistance (CFA) to various tourism development projects in the states of Arunachal Pradesh, Sikkim and Nagaland.

The Ministry has approved CFA of Rs 25.04 crore (US\$ 4.03 million) for the ongoing tourism mega circuit projects at Tirupati and Kadapa district in Andhra Pradesh. The Government has proposed to set up the Central Institute of Hotel Management (IHM), Catering Technology and Applied Nutrition in the country. The IHM will be set up at Jagdishpur, Uttar Pradesh.

The Ministry of Tourism has undertaken joint development of tourist amenities at Amritsar and Rai Bareilly, Trivandrum, Gaya and Agra Cantt Railway Stations in association with Ministry of Railways. CFA of Rs 10.28 crores (US\$ 1.65 million), Rs 5.98 crore (US\$ 964,453.42), Rs 5.18 crore (US\$ 835,413.19) and Rs 5.05 crore (US\$ 814,141.59) has been provided by the Ministry for the same.

Future growth factors

India has the potential to become the number one tourist

destination in the world with the demand growing at 10.1 per cent per annum, the World Travel and Tourism Council (WTTC) has predicted. The WTO (World Travel Organisation) predicts that India will receive 25 million tourists by year 2015.

The earlier setbacks in global tourism have strengthened the Department of Tourism's resolve to promote India's tourism through aggressive marketing strategies through its campaign 'Incredible India'. The 'marketing mantra' for the Department of Tourism is to position India as a global brand to take advantage of the burgeoning global travel and trade and the vast untapped potential of India as a destination. Talking about factors that would influence, we can list them roughly as below:

Demand and supply

Fortunately for India, demand exceeds the supply, indicating an excellent opportunity level. It is roughly estimated that another 1,50,000 rooms can easily be accommodated in the Hospitality sector. For all willing participants of Hospitality sector, it might not be possible to meet the enormous amount of investment to build attractive and efficient Hospitality sectors, and hence, service apartments, self- service hotels, like ginger hotels, are coming up, more so, in the touristy regions, with commendable success. Retail boom in business has contributed more to well-healed hospitality units with opulence in major cities. Information technology growth

Information technology boom in India is connected with the business tourism and has exposed India's hospitality sector to unlimited vistas. Globalization, out-sourcing, multi-national companies have influenced Indian cities like Bangalore and the various company executives and exchange staff travelling into and out of India has been another major factor for the expansion of Hospitality sectors.

Future trends

According to Mohamed Derouiche, among the biggest emerging outbound markets, we can cite here China and India with over a billion people each, many of which are starting to travel internationally. If we look, for instance, at the number of Chinese people who travelled abroad, it rose considerably between 2006 (34,524 million travellers) and 2010 (57,386 million travellers) thus marking a 66 per cent increase over the four years.

Market

The total market size of Indian tourism and hospitality sector stood at US\$ 117.7 billion and is expected to touch US\$ 418.9 billion by 2022. The foreign direct investment (FDI) inflows in hotel and tourism sector during April 2000 to July 2013 stood at US\$ 6,754.49 million, as per the data released by Department of Industrial Policy and Promotion (DIPP). Foreign tourist arrivals (FTA) during the Month of August 2013 stood at 4.74 lakh as compared to FTAs of 4.46 lakh during August 2012, registering a growth of 6.4 per cent. Foreign exchange earnings (FEE) during the month of August 2013 were US\$1.294 billion as compared to FEEs of US\$1.306 billion during August 2012 and US\$ 1.264 billion in August 2011.

Travel hospitality and environment

Travel and Tourism have strong inherent links to the environment. In some countries, the natural environment and its wildlife, flora and fauna are what distinguish them from other tourism destinations. Hence, it is the responsibility of tourism and hospitality to preserve environment as best as they can.

Recent trends

Recent slowing down of global economy and prevailing uncertainty created sharp slowdown in the industry in the past two years. According to a report, significant supply addition is expected across key markets in India during 2012-13, particularly in Chennai and the NCR. Supply addition in 2013-14 also expected to be robust. The Indian Hotel occupancies, barring some pick up in October 2012 has been lower than the previous fiscal.

Consumer dynamics and futuristic policies

With the increased tourist movement and resulting economic growth according to the changing consumer dynamics, a slew of financial measures were taken by the Government in the last two decades. Various policy measures undertaken by the Ministry of Tourism and tax incentives have also aided growth of the hospitality industry; some of them include:

1. Allowance of 100% FDI in the hotel industry (including construction of hotels, resorts, and recreational facilities) through the automatic route.
2. Introduction of Medical Visa for tourists coming into the country for medical treatment.
3. Issuance of visa-on-arrival for tourists from select countries, which include Japan, New Zealand, and Finland.
4. Promotion of rural tourism by the Ministry of Tourism in collaboration with the United Nations Development Programme.
5. Elimination of customs duty for import of raw materials, equipment, liquor etc
6. Capital subsidy programme for budget hotels
7. Exemption of Fringe Benefit Tax on crèches, employee sports, and guest house facilities
8. Five-year income tax holidays for 2-4 star hotels established in

Marketing strategies

Marketing strategies in the hospitality industry have changed drastically over the past decade. A decade back, the brand name of the hotel was a major driver. However, with the arrival of well-educated and experienced travelers, hotel companies have had to change/realign their marketing strategies. Today, hotel companies marketing strategies are differentiation, consistency, customer satisfaction, delivery of brand promises, and customer retention.

Development and use of technology have also changed the way hotel companies operate, creating the need for online marketing. Travelers increasingly conduct basic research on the Internet. Blogs, networking sites, and travel sites are therefore being used for making choices and the information provided tends to influence opinions and choices. Several travel portals have emerged in recent times and travelers are increasingly using these portals to make hotel reservations.

Hotel industry and economic growth

As is the case with industries that depend on discretionary spending, the performance of the hotels industry is intrinsically knit with the economic growth. However, we have in the past witnessed periods of decoupling between the hotels industry and GDP growth; particularly during periods of recession and the early phases of recovery. During the economic down cycle, the faster pace of deceleration in the hotels industry, as witnessed during 2009, can take the industry to deep troughs. While the climb during the initial phases of recovery is faster than the economic revival, a strong underlying economy is a pre-requisite for a sustained recovery.

Sector overview

The Indian tourism and hospitality industry experienced a growth of 24.6% during 2009–2010 timeframe. The industry is the third- largest foreign exchange earner, accounting for 6.2% of India's GDP and 8.8% of India's total employment, according to a report by the Planning Commission.

It has significant linkages with other sectors such as agriculture, horticulture, transportation, handicrafts and construction. The tourism industry includes travel agencies, tour operating agencies and tourist transport operating agencies; units providing facilities for cultural, adventure and wildlife tourism; surface, air and water transport facilities for tourists; and convention/seminar units and organizations.

According to the Planning Commission, the sector creates more jobs per million rupees of investment than any other sector of the economy and is capable of providing employment to a wide spectrum of job seekers, from the unskilled to the specialized, even in the remote parts of the country. The sector's employment-generation potential has also been highlighted by the World Travel & Tourism Council (WTTC), which says India's travel and tourism sector is expected to be the second-largest employer in the world, employing 40, 37, 000 people, directly or indirectly, by 2019.

Performance of hotel industry

The performance of the hotel industry is directly connected with global and local economic growth and investor confidence. A strong underlying economy is a pre-requisite for sustained recovery. Unfortunately, the year 2011 has not been a year of economic recovery either in India or globally. After two exceptionally bad years, the global hospitality industry was expected to recover in 2011. Despite encouraging signs in the first half of 2011, there was growing uncertainty during the latter part of the year. As a result, recovery has been fragile during 2011. The situation in India mirrors this overall global trend.

The United Nations World Tourism Organisation (UNWTO) expects growth to continue for the tourism sector in 2012, although at a slower rate. It forecasts international tourist arrivals to grow in the range of 3% to 4% in 2012. WTTC indicates that this growth will be moderate as the bounce-back for tourism destinations that faced specific challenges last year, will be offset by a weaker performance in other countries.

Travel and tourism in China, India, Japan will bounce back while, Latin America and Africa are expected to perform well

in the year 2012. UNWTO predicts that India will receive 25 million foreign tourists by the year 2015. Despite the economic and political scenarios worldwide, demand for business travel has remained relatively robust.

Companies are likely to increase spends and the multiplier effect of healthy salary increases will drive discretionary spending, especially on leisure travel. The affluent segments plan to spend more on travel in 2012, creating opportunities for the hospitality sector in the luxury space.

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