



An Insight into Tourism Industry in India - Growth and Development

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ABSTRACT

The growth and development of the tourism industry is a contemporary topic of discussion. This dynamic and evolving process reaches social and economic development to every corner of the country. Tourism growth refers rise of tourist fluxes, travels, new destinations, diverse tourism products, and profits associated to it, while tourism development indicates process of developing strategic plans, and implementing activities to encourage, establish, expand, and maintain tourism industry in a particular area. India is utilising its resources to establish tourism industry as a strong pillar of economic growth and development. Notably, multiple studies point to growth trend, and development initiatives of Indian tourism in different timeline, yet there is scant work on its extensive discussion since independence, as well as post-pandemic resurgence. This study shows Indian tourism has transformed and evolved to a large global industry, experienced a significant growth in various phases, adapted world trends, and moved forward development. The industry through high tourist influxes, valuable contribution in Gross Domestic Product (GDP) and employment, and infrastructure enhancement, has driven economic and social changes, and global interconnectedness. Indian Ministry of Tourism assessed tourism regained pre-pandemic level of 5 percent contribution to GDP in 2022-23. In the post-pandemic 'new normal', tourism in rural, offbeat, and other niche areas is receiving attention to alleviate socio-economic gaps in the country. The current statistics depicts resilience and robust growth of Indian tourism sector reflecting an upward trend in domestic and international tourism.

Keywords: *Indian Tourism Industry, Rural Tourism, Tourism Infrastructure, Socio-economic Development, Resurgence of Tourism Industry.*

JEL Codes: L83, Y10, Z32

1. Introduction

The tremendous potential of India for tourism growth acts as an accelerator for nation's economic development and growth. Besides the economic benefit of tourism, citizens of the country enjoy cultural interaction with people of foreign countries and of different regions within the country, fostering regional cooperation. Now, tourism is the second-highest revenue-generating industry in India. However, tourism in the earlier era was not known as an industry. Industrialisation, technological and modern advancements have motivated the human mind and changed their aspirations. The globalisation and liberalisation with these advancements have given pace and energy to tourism and helped it to transform into an industry. Moreover, today's tourism in the country is not what it was in the 1980s and 1990s rather, it has touched every corner of the Indian economy. It is a catalyst in socio-profitable and infrastructural development. Thus, tourism creates a position among the most vibrant and significant sectors. The contemporary tourism industry has excellent potential to provide direct and indirect employment, to develop understanding among people, to generate foreign exchange, and to raise the standard of living [32]. Being one of the fastest-growing industries

in the world, it has enjoyed a global growth rate of 3.5% compared to the global economic growth rate of 2.5% in the year 2019 [29].

Incredible India's unique geographical identity, nature, history, heritage resources, numerous attractions, connectivity, infrastructure, markets, and multicultural experiences attract domestic and international tourists. However, in 2019 (considered as a pre-pandemic reference point), the Domestic Tourist Visits (DTV's) were 2321.98 million with a 25.26% yearly growth rate, and the number of International Tourist Arrivals – ITAs (Foreign Tourist Arrivals – FTAs and arrivals of Non-Resident Indians – NRIs) in the country was 17.91 million with a yearly growth rate of 2.8%, whereas the number of Indian visitors departed to other countries was 26.92 million at a growth of 2.36% [22]. It is alarming that imports are more than exports in tourism because it may result in an adverse effect on the balance of trade. The same picture was there in 2018 and even earlier. Observing this figure, the Prime Minister of India, on the occasion of the 73rd Independence Day, encouraged 'Domestic Tourism'.

Unfortunately, the COVID-19 Pandemic hit the world at such a high speed that it generated a global health emergency and a challenge that people have never seen after World War II. The epidemic negatively affected the economy in different aspects, and the tourism industry was one of the most affected sectors across the globe. The CRISIL's (Credit Rating Information Services of India Limited) analysis, 2020 made a classification based on the depth and duration of the effect, and it revealed that the tourism sector falls under the most vulnerable category facing a major loss of income and profit. According to the World Bank, the global economy has seen a loss of about USD 1.3 trillion in terms of export revenues due to a deep decline in international travel led by the pandemic [31]. This loss was further than 11 times the loss of the economic crisis in 2009, as stated by the World Bank. As per the WTTC India Report (2021), the benefactions of the Indian tourism sector to total employment, total exports, and Gross Domestic Products (GDP) have dropped from 8.8% (2019) to 7.3% (2021), 5.8% (2019) to 2.5% (2021) and 6.9% (2019) to 4.7% (2021) respectively [29]. Consequently, it has produced a huge impact on governments, businesses, other allied sectors, and the local community. The economic package of "Aatma Nirbhar Bharat Abhiyan", launched on 6th May 2020, by the central government, was the response to the pandemic where 'Aatma Nirbhar' (Self-Reliant) in the context of tourism aimed to motivate huge outbound tourists in making their priority to domestic destinations and to create higher inflow of international tourists into India.

In today's dynamic world, understanding the contribution of tourism industry to the nation's economic growth and development in general and to local economy and society management, community development, and infrastructure development in particular requires studies on tourism. Many scholarly studies have described the growth trend the tourism industry has been experiencing since economic reform. Irrespective of the inconsistent pattern in growth of FTA in India for the periods 1980s and 1990s, the number has constantly risen since 1991, excepting some downfall years [1]. The country is, thus, entering a good number of foreign visitors and gaining a valuable amount of foreign exchange every year as a result [35]. Analysis

of the growth pattern reveals Foreign Tourist Arrival (FTA) and Foreign Exchange Earning (FEE) hold a high degree of positive association with time, which means that the variability in FTA and FEE is explained primarily by time [2, 11]. Similarly, the growth of domestic tourism increases continuously with the passage of time [11]. Investment in the tourism sector, together with other factors, has become successful, to some extent, in attracting domestic and foreign tourists [3]. However, the development of tourism in India has been seen, especially in the post-reform period. The Indian travel industry had an emotional and concrete rate of development, and it faced jumps and bonds in its path [34]. The rapid growth of the industry by 2019 without concern about any threat simply reflects the potential and prospects of Indian tourism. Despite that, the COVID-19 crisis has changed the whole scenario, creating a severe fall in income and employment generation [10]. The impact of the crisis is found in all topographical tourism sections like inbound, outbound, and domestic, and in all verticals like MICE (Meetings, Incentives, Conferences, and Exhibitions), relaxation, experience, legacy, corporate, etc. [8, 10]. Several studies discussing the effect of the crisis [4, 30] are concerned with the revival of the tourism industry and have proposed frameworks for facilitating the restart of the industry and guiding to a sustainable recovery in the post-pandemic timeline. However, analysis regarding the tourism scenario in the post-COVID era is small in number. Hence, there is a requirement to analyse whether and to what extent the tourism sector has successfully overcome and grown in India. Besides the present scenario and growth patterns, an insight into the development of the tourism sector is necessary to understand. Despite various works in the field of tourism growth and development of the country, the scarcity of its deep, detailed, and systematic studies is present.

The present paper aims to address the gap by assessing its appearance over time. Firstly, in this process, a review of previous work has given an overview of the industry. Secondly, to delve deeper, the study involves investigating the performance and growth of the tourism industry in India since independence. And finally, it tries to shed light on development activities in the industry throughout the years. Analysing its growth is necessary for researchers, businesses, society, and governments to understand how tourism drives economic and social changes. Apart from, one can presume global interrelation from this study. That sort of work broadens the government's reach in making policy and investment decisions to promote and enhance tourism in India.

This study helps make projections for the country's future tourism industry and imagine India as a tourism hub. The primary objectives of the study are – i) to study the performance and growth of the Indian tourism industry; and ii) to know the development status of the tourism sector in India.

2. Materials and Methods

The present study considers the whole period from 1947, focusing mainly on FTAs, FEEs, DTVs, outbound tourist flow, share in GDP and employment, and the country's position in the world

concerning tourism. Note that in some cases, the study considers the period since reform due to the unavailability and inaccessibility of data for the early period of independence. The secondary data and information required for the study have been collected from the Ministry of Indian Tourism website and their published database like India Tourism Statistics and Annual Report; governmental policy documents; research papers, articles, internet, etc. A percentage analysis with tables and diagrams has been used.

3. Results and Evaluation

3.1. Foreign Tourist Arrivals and Foreign Exchange Earnings

Despite less attention to tourism than in key areas like agriculture, industry, etc., India received 15,000 foreign tourists at its very nascent stage in 1950. With this potentiality, India received 0.066% of 25 million (16,829) world travellers and tourism added Rs. 7.7 crores in foreign exchange reserves of India in 1951 [26]. The notable performance of the tourism sector from 1951 to 1990 in terms of FTAs is shown in Table 1.

Table 1. Foreign tourist arrivals to India, 1951-1990

Year	Arrivals	
	Numbers	Percentage Change (%)
1951	16829	-
1960	123095	24.7 ^a
1970	280821	8.6 ^a
1980	1253694	16.1 ^a
1990	1707158	3.1 ^a

^a Average annual growth

Source: Bureau of Immigration, India Tourism Statistics, 2003

The number of FTAs in India touched the level of 1.28 million in 1981 [16]. Table 2 shows the growth schedule of Indian tourism through FTAs and its percentage change over the past year from 1981 to 1991.

Table 2. Foreign tourist arrivals to India, 1981-1991

Year	Foreign Tourist Arrivals	Annual Growth (%)
1981	1279210	2.0
1982	1288162	0.7
1983	1304976	1.3
1984	1193752	-8.5
1985	1259384	5.5
1986	1451076	15.2
1987	1484290	2.3
1988	1590661	7.2
1989	1736093	9.1
1990	1707158	-1.7
1991	1677508	-1.7

Source: Bureau of Immigration, India Tourism Statistics, 2006

The average annual growth percentage from 1981 to 1991 was 3.1%, which is much lower. The schedule reflects frequent ups and downs in growth percentages in this period. India's FTAs and FEEs along with their yearly growth rates, are given in Table 3 and Table 4.

Table 3. Foreign tourist arrivals and foreign exchange earnings in India, 1991-2010

Year	FTAs in India	Annual Growth (%)	FEEs in India (Rs. Crores)	Annual Growth (%)
1991	1677508	-1.7	4318	-
1992	1867651	11.3	5951	37.8
1993	1764830	-5.5	6611	11.1
1994	1886433	6.9	7129	7.8
1995	2123683	12.6	8430	18.2
1996	2287860	7.7	10046	19.2
1997	2374094	3.8	10511	4.6
1998	2358629	-0.7	12150	15.6
1999	2481928	5.2	12951	6.6
2000	2649378	6.7	15626	20.6
2001	2537282	-4.2	15083	-3.5
2002	2384364	-6.0	15064	-0.1
2003	2726214	14.3	20729	37.6
2004	3457477	26.8	27944	34.8
2005	3918610	13.3	33123	18.5
2006	4447167	13.5	39025	17.8
2007	5081504	14.3	44360	13.7
2008	5282603	4.0	51294	15.6
2009	5167699	-2.2	53754	4.8
2010	5775692	11.8	66172	23.1

Source: i) Bureau of Immigration, India Tourism Statistics, 2014

ii) Bureau of Immigration, India Tourism Statistics, 2020

Table 4. Foreign tourist arrivals and foreign exchange earnings in India, 2011-2023

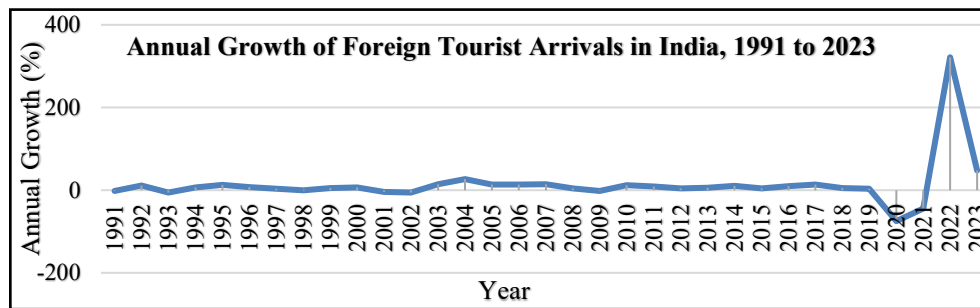
Year	FTAs in India (Million)	Annual Growth (%)	FEEs in India (Rs. Crores)	Annual Growth (%)
2011	6.31	9.20	83037	25.49
2012	6.58	4.30	95606	15.14
2013	6.97	5.92	107563	12.51
2014	7.68	10.20	120366	11.90
2015	8.03	4.53	134843	12.03
2016	8.80	9.68	150750	11.80
2017	10.04	13.99	178189	18.20
2018	10.56	5.20	195312	9.61
2019	10.93	3.53	216467	10.83
2020	2.74	-74.89	95738	-55.77
2021	1.52	-44.36	63978	-33.17
2022	6.44	321.54	169917	165.59
2023	9.52	47.90	231927	36.49

Source: i) Bureau of immigration, India Tourism Statistics, 2023

ii) Reserve Bank of India and Ministry of Tourism, Govt. of India, India Tourism Statistics at a Glance, 2023

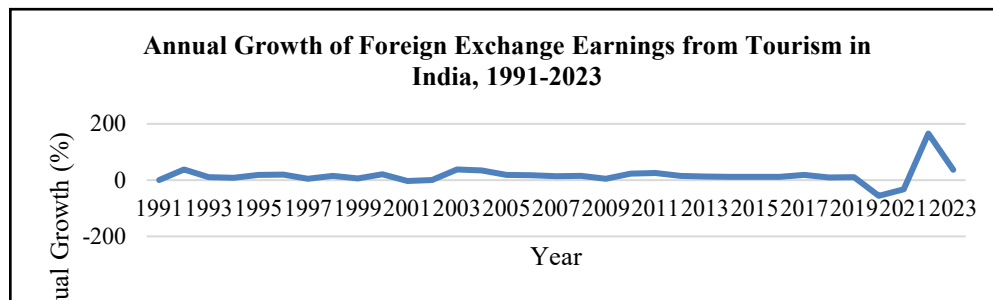
iii) Bureau of Immigration, Reserve Bank of India, and Ministry of Tourism, Govt. of India, India Tourism Data Compendium Key Highlights, 2024

After 1991, FTAs experienced general but fluctuating growth rates without any consistent pattern. Except for some occasional dips, the number of FTAs has increased over the years. All the declines in the number of FTAs till 2019, are nothing in front of the drastic decline witnessed by the year 2020. Recovering from severe damages in international travel, tourism rebounded in 2022 with an increase in FTAs to 6.44 million, which is about 321.5% change over the previous year. It simply indicates the potential for resurgence that the tourism industry has. Figure 1 shows the pattern of percentage change of FTAs over the previous year from 1991 to 2023.

Fig. 1. Pattern of percentage change of FTAs over the previous year, 1991 to 2023.

Source: Created by Author

Similarly, the schedule of FEEs describes the pattern the tourism industry follows in bringing foreign exchange reserves into India. The earnings from tourism reached Rs. 702 crores in 1981. Later, a significant dip of 55.77% was seen in the lockdown year. But it recovered easily and rapidly from 2022. Figure 2 presents the trend of percentage change of FEEs over the past year from 1991 to 2023.

Fig. 2. Trend of percentage change of FEEs over the past year 1991 to 2023

Source: Created by Author

In 2024, FTAs and FEEs in the country were 76.81 lakhs and Rs. 2,16,759 crores, respectively, provisionally estimated for ten months i.e., January to October [24].

3.2. Domestic Tourist Visits

The number of domestic tourists in India was unavailable for the earlier period after 1947. But the volume of travellers carried by railway and road transport indicates the enormous size of domestic tourism in the country [26]. In 1990, the number of domestic tourists in the nation was 62.3 million [12]. A survey found out of 196 million households in India, members of about 44% (88 million) households went on at least one domestic trip as a tourist in 2002 [27]. The statistics for DTVs to various states/UTs from 1991 to 2023 are shown in Table 5 and in Figure 3.

Table 5. Domestic tourist visits in India, 1991 to 2023

Year	Domestic Tourist Visits	Annual Growth Rate (%)
1991	66670303	-
1992	81455861	22.2
1993	105811696	29.9
1994	127118655	20.1
1995	136643600	7.5
1996	140119672	2.5
1997	159877208	14.1
1998	168196000	5.2
1999	190671034	13.4
2000	220106911	15.4
2001	236469599	7.4
2002	269598028	14.0
2003	309038335	14.6
2004	366267522	18.5
2005	392014270	7.0
2006	462321054	17.9
2007	526564478	13.9
2008	563034107	6.9
2009	668800482	18.8
2010	747703380	11.8
2011	864532718	15.6
2012	1045047536	20.9
2013	1142529465	9.3
2014	1282801629	12.28
2015	1431973794	11.63
2016	1615388619	12.81

2017	1657546152	2.61
2018	1853787719	11.84
2019	2321982663	25.26
2020	610216157	-73.72
2021	677632981	11.05
2022	1731013539	155.45
2023	2509630000 * ^p	44.98

* Estimated in figure, 2509.63 million = 2509630000

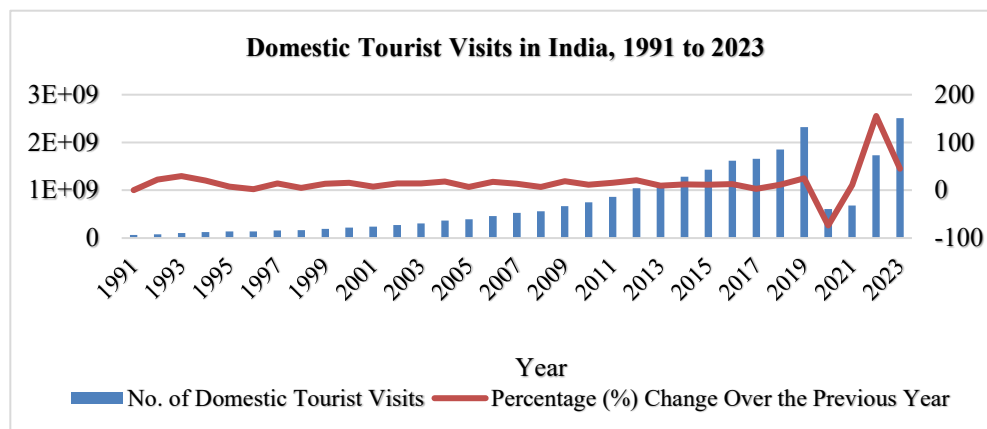
^p Provisional

Source: i) India Tourism Statistics, 2014

ii) India Tourism Statistics, 2023

iii) India Tourism Data Compendium Key Highlights, 2024

Fig. 3. Domestic Tourist Visits in India, 1991 to 2023



Source: Created by Author

The CAGR of DTVs was 13.75% from 1991 to 2014 [17] and 5.96% from 2011 to 2022 [23]. The numbers decreased by 73.72% over 2019 in the COVID Period. It is very satisfactory that the number started rising in 2021 and increased by 155.45% in 2022 and 44.98% in 2023. It reflects very fast retrieval of the tourism sector.

3.3. Outbound Tourists in India

The number of Indian National's Departures (INDs) to other countries and its percentage change over the past year for the period 1991 to 2023 is shown in Table 6.

Table 6. Number of Indian national's departures from India, 1991 to 2023

Years	Number of Outbound Indians	Percentage change
1991	1942707	-14.8
1992	2161301	11.3
1993	2733304	26.5
1994	2734830	0.1
1995	3056360	11.8
1996	3463783	13.3
1997	3725820	7.6
1998	3810908	2.3
1999	4114820	8.0
2000	4415513	7.3
2001	4564477	3.4
2002	4940244	8.2
2003	5350896	8.3
2004	6212809	16.1
2005	7184501	15.6
2006	8339614	16.1
2007	9783232	17.3
2008	10867999	11.1
2009	11066072	1.8
2010	12988001	17.4
2011	13994002	7.7
2012	14924755	6.7
2013	16626316	11.4
2014	18332319	10.3
2015	20376307	11.1
2016	21871995	7.3

2017	23942957	9.5
2018	26296484	9.8
2019	26915034	2.4
2020	7294566	-72.9
2021	8551315	17.23
2022	21602734	152.62
2023	27880000 *	29.06

* Estimated in figure, 27.88 million = 27880000

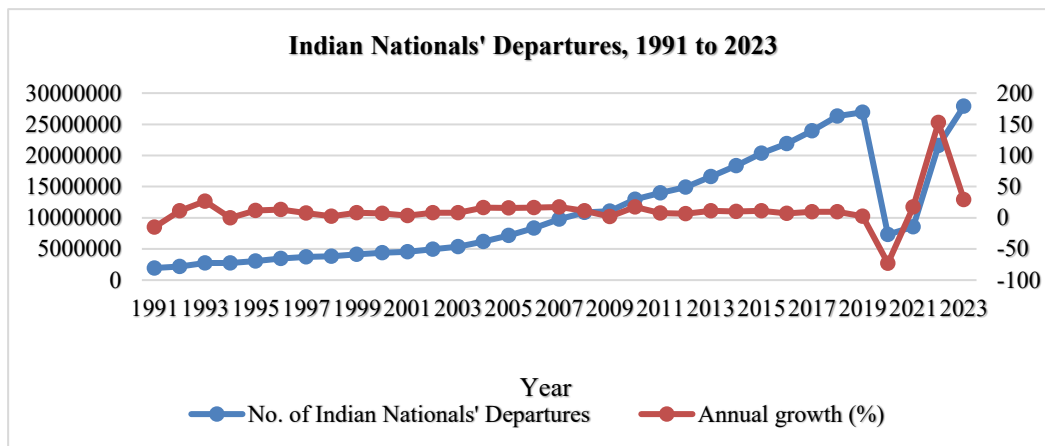
Source: i) Bureau of Immigration, India Tourism Statistics, 2021

ii) Bureau of Immigration, India Tourism Statistics, 2023

iii) Bureau of Immigration, India Tourism Data Compendium Key Highlights, 2024

In 2020, there was a fall in INDs from the previous year. However, from 2021 it faced positive growth in three consecutive years. The monthly data (Provisional) of INDs states its figure for January to October, 2024 is 25087316 i.e., around 25.08 million [24]. Figure 4 presents the number of INDs and its growth pattern for 1991 to 2023.

Fig. 4. Pattern of growth in INDs, 1991 to 2023



Source: Created by Author

3.4. Economic Impact of Tourism

The impact of travel and tourism growth on global economy occurs in the form of GDP growth, job creation, income generation, enhancing export and receipts, infrastructure development, etc. In 1989-90, the Indian tourism industry created 5.5 million direct and 8 million indirect jobs [12]. Per million rupees of investment, the manufacturing sector had created 45 jobs while for the travel and tourism sector, it was 78 in India [33].

Despite occasional shocks, tourism continuously expanded up to 2019, and hence, it appeared as the fastest-growing and largest economic industry in the world. It resumed its role by 2023, recovering the damages of severe pandemic disruption. According to the Ministry of tourism, Govt. of India, the System of National Accounts is unable to measure tourism's contribution to the economy as like other industries because tourism is a demand-based concept and the tourism economy is interpreted by the expenditure of tourists. Therefore, an assessment of the contribution of tourism to GDP as well as employment in the country has been done through the Tourism Satellite Account (TSA), which is computed by the NCAER (National Council of Applied Economic Research) following the methodology recommended by UNWTO (United Nations World Tourism Organization). As per the estimation in accordance with the 3rd TSA, prepared in 2018 for the reference year 2015-16, tourism benefits received in the GDP and employment of India from 2017-18 to 2022-23 has been illustrated in Table 7.

Table 7. GDP and employment from tourism in India

	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Share in GDP (%)	5.02	5.02	5.17	1.50	1.75	5.00
Direct (%)	2.61	2.61	2.69	0.78	0.91	2.60
Indirect (%)	2.41	2.41	2.48	0.72	0.84	2.40
Share in Jobs (%)	14.78	14.87	13.50	12.91	12.66	12.57
Direct (%)	6.44	6.48	5.89	5.63	5.52	5.48
Indirect (%)	8.34	8.39	7.61	7.28	7.14	7.09
Direct + Indirect Jobs due to Tourism (million)	72.69	75.85	69.44	68.07	70.04	76.17

Source: Annual Report 2024-25, Ministry of Tourism, GOI

Note: Estimates have been updated using NSA 2024

Tourism's share in GDP reduced to 1.50% in 2020-21 because of pandemic. In 2022-23, the share was 5% consisting of 2.60% direct and 2.40% indirect share. Tourism shares 12.57% of the country's total employment in 2022-23, where 5.48% is direct and 7.09% is indirect employment. As per the forecast, the Indian travel and tourism market is expected to generate US\$ 25.01 bn revenue in 2025, and projected to grow at CAGR of 8.06% from 2025 to 2029, resulting in a market volume of US\$ 34.11 bn by 2029 [36].

3.5. Indian Tourism in World

The share that India holds in the International Tourism Receipts (ITRs) of the world from 1991 to 2022 is given in Table 8.

Table 8. International tourism receipts, and India's share & rank, 1991 – 2022

Year	World Tourism Receipt (US \$ billion)	Tourism Receipts in India (US \$ billion)	Percentage Share of India in World	Rank of India
1991	277.5	1.86	0.67	-
1992	320.4	2.13	0.66	-
1993	327.0	2.12	0.65	-
1994	356.2	2.27	0.64	-
1995	404.7	2.58	0.64	-
1996	438.3	2.83	0.65	-
1997	441.8	2.89	0.65	-
1998	444.8	2.95	0.66	34 th
1999	458.2	3.01	0.66	35 th
2000	475.3	3.46	0.73	36 th
2001	463.8	3.2	0.69	36 th
2002	481.9	3.1	0.64	37 th
2003	529.3	4.5	0.84	37 th
2004	633.2	6.2	0.97	26 th
2005	679.6	7.5	1.1	22 nd
2006	744	8.6	1.16	22 nd
2007	857	10.7	1.25	22 nd
2008	939	11.8	1.26	22 nd
2009	853	11.1	1.31	20 th
2010	931	14.5	1.56	17 th
2011	1042	17.7	1.7	18 th
2012	1117	18.0	1.61	16 th
2013	1198	18.4	1.54	16 th
2014	1252	19.7	1.57	15 th
2015	1217	21.0	1.73	14 th

2016	1247	22.9	1.84	13 th
2017	1349	27.3	1.84	13 th
2018	1439	28.6	1.99	13 th
2019	1486	30.7	2.07	14 th
2020	554	13.0	2.35	13 th
2021	632	8.7	1.38	23 rd
2022 ^P	1109	21.4	1.93	14 th

^P Provisional

Source: i) India Tourism Statistics, 2006

ii) India Tourism Statistics, 2014

iii) India Tourism Statistics, 2023

In 2022, the share has reached to 1.93% along with the improvement in the rank from 36th of 2001 to 14th of 2022. India provisionally held a 1.48% share in 969 million world tourist advents [23]. The first three nations in terms of arrivals were France, Spain, and the United States. Table 9 shows the top ten source countries of inbound tourism in India and their ranks throughout different years.

Table 9. Top 10 source countries for foreign tourist arrivals in India

Rank	Country (2018)	Share in 2018 (%)	Country (2019)	Share in 2019 (%)	Country (2020)	Share in 2020 (%)	Country (2021)	Share in 2021 (%)	Country (2022)	Share in 2022 (%)
1	Bangladesh	21.37	Bangladesh	23.6	Bangladesh	20.0	USA	28.1	USA	21.8
2	USA	13.80	USA	13.8	USA	14.4	Bangladesh	15.8	Bangladesh	19.8
3	UK	9.75	UK	9.2	UK	10.6	UK	10.7	UK	10.0
4	Sri Lanka	3.35	Australia	3.4	Canada	4.5	Canada	5.3	Australia	5.9
5	Canada	3.32	Canada	3.2	Russian Federation	3.7	Nepal	3.4	Canada	4.5
6	Australia	3.28	China	3.1	Australia	3.2	Afghanistan	2.4	Sri Lanka	2.8

7	Malaysia	3.02	Malaysia	3.1	France	2.7	Australia	2.2	Germany	2.2
8	China	2.67	Sri Lanka	3.0	Germany	2.6	Germany	2.2	Nepal	2.1
9	Germany	2.60	Germany	2.4	Malaysia	2.5	Portugal	2.1	Singapore	2.1
10	Russian Federation	2.48	Russian Federation	2.3	Sri Lanka	2.5	France	2.0	Malaysia	2.0

Source: i) Bureau of Immigration, India Tourism Statistics, 2019

ii) India Tourism Statistics, 2021

iii) India Tourism Statistics, 2022

iv) India Tourism Statistics, 2023

How much a country has improved itself and what distance it has to cover to make its position much better is assessed through the indexes. Table 10 presents some important ranks to highlight India's place in the index.

Table 10. India's ranks in travel and tourism development index

Description	TTDI Index/Pillar	Rank (2019) - TTCI	Rank (2021) - TTDI
Top performing 5 Pillars of TTDI	Natural resources	14 th	6 th
	Non-Leisure Resources ^b	NA	8 th
	Cultural resources	8 th	12 th
	Air transport Infrastructure	33 rd	20 th
	Price Competitiveness	13 th	26 th
Top 4 Pillars with most significant improvement	Safety and Security	122 nd	91 st
	Environmental sustainability	128 th	113 th
	Prioritization of Travel and Tourism	94 th	81 st
	Air transport Infrastructure	33 rd	20 th
Overall Performance	Travel and Tourism Development Index	34/46 th ^c (TTCI-2019/TTDI 2021)	54 th

^b Newly added in the TTDI 2021& hence was absent in TTCI 2019

^c As per WEF, while TTDI is an update of TTCI, due to the altered methodology, the 2021 TTDI should not be compared to the 2019 TTCI. To address this, the 2019 results were recalculated using the new framework of the TTDI.

Source: Travel and Tourism Development Index, 2021 – India Tourism Statistics, 2023

According to the Travel and Tourism Competitiveness Index - TTCI (2019), India's tourism sector ranked 13th among 140 countries in terms of price competitiveness, which was very impressive. In the post-pandemic world, India comes back as a destination of great hospitality services, and in that same index, India stands at 18th in the globe as of 2024, which is an improvement from 26th of 2021. As per the Travel and Tourism Development Index (TTDI) Report - 2024, India has performed very well in three areas out of the TTDI-pillars - Prioritization of Travel & Tourism, Safety & Security, and Health & Hygiene [14]. India is 39th among 119 countries as per TTDI, 2024 published by the World Economic Forum (WEF), which is simply an improvement from the 54th rank of 2021 (adjusted to 38th place following the WEF's new methodology). USA is 1st in the Index and India is at the top among lower middle-income group countries. It is an economically preferred destination for medical tourism as it appeared as the 5th largest travel healthcare site in the world with a market size of US \$9 billion in 2019. The comparison of India with BRICS and SAARC countries in terms of TTDI, 2021 is shown in Table 11.

Table 11. India in BRICS and SAARC countries in terms of TTDI, 2021

BRICS Countries		SAARC Countries	
Country	Rank	Country	Rank
China	12 th	Sri Lanka	74 th
Brazil	49 th	Bangladesh	100 th
Russia	-	Pakistan	83 rd
South Africa	68 th	Nepal	102 nd
India	54th	India	54th

Source: India Tourism Statistics, 2023

3.6. Developments in Indian Tourism Industry

The foundation of the tourism industry was settled in India before independence. Today's industry has been possible through some systematic efforts, including the establishment of the Sir John Sargent Committee (1945), the Tourist Traffic Committee (1948), and the Tourist Traffic Branch (1949). The government started various sections to initiate tourist publicity, tourism advertisement, tourism distribution, tourism information, tourism administration, and tourist traffic. The 1st 5-year plan (1951-1956) of independent India did not consider tourism officially in the planning. Later, tourism earned a place in the document of the 2nd 5-

year plan (1956-1961) with the financial allocation of Rs. 3.36 crore. It was the first planned development approach for tourism. The tourism department under the Ministry of Transport and Communications was improving and introducing transport and hospitality infrastructure. Simultaneously, tourism planning methodology was gradually developing. A notable step during the 3rd 5-year plan (1961-1966) period was the establishment of ITDC (India Tourism Development Corporation) in 1966, which structured the tourism sector and created a history. ITDC, as an agency under the Ministry of Tourism and Civil Aviation (est. in 1967), had taken up the responsibility of providing unique tourist services throughout the country. As a result, infrastructure and service qualities were updated from the earlier indifferent and substandard levels. The three annual plans, i.e., 1966-67, 1967-68, and 1968-69, also provided financial outlay for tourism development. The allocated amount for tourism was distributed between the centre and the states. Later, tourism development corporations of states and private enterprises collaborating with ITDC opened luxury accommodations in metropolitan cities, and local tourist places in the vicinity of all tourist entry and exit for foreigners and the domestic elite class. The 4th 5-year plan emphasised controlling tourist traffic through rules and regulations and introducing more chartered flights for tourist movements. The next plan also adapted all these initiatives with an extra focus on publicity abroad.

In 1970s and 1980s, India was a popular destination around the globe. The international visitors set out on a journey named the “Hippie Trail” towards sites like Goa, Varanasi, Taj Mahal, and other artistic and literal hubs. Most of the international backpackers were from Western countries. The development of hotels, resorts, airports, and other transportation was more emphasised. Further, the 6th 5-year plan (1980-1985) emphasised the usefulness of tourism as an economic tool of growth, as well as the key to social integration and peace. Following the recommendation of the new policy of 1982, the government added tourism to the concurrent list so that constitutional recognition could be given to tourism, and required legislation could also be enacted to regulate acts of service providers. The significant steps of the 7th 5-year plan period (1985-1989) were the setup of the National Committee on Tourism (1988) and Tourism Finance Corporation (1989). The committee’s draft on an extensive plan for tourism growth recommended each states making plans, equipping with fiscal and monetary stimulus, and adapting environmental protection. The finance corporation for tourism development provided commercial financing to the tourism stakeholders. Providing a portion of tourism fund to HRD (Human Resource Development), the development of human resources was initiated through IITM (Indian Institute of Tourism and Travel Management) and 15 new food craft institutes. An attempt was made to diversify tourism products like winter sports, beach resorts, trekking conventions, and arts and crafts. On other hand, some budget accommodation facilities were arranged, such as Dharamshala, Yatriniwas, Musafirkhanas, etc. At the launch of the 1990s, 44,405 hotel rooms were available under the approved category in India. There was a concession in hotels set up in rural areas, pilgrim centres, and others to boost lodgement in tourist places. The government gave technical help, marketing and operational expertise,

interest subsidies, and loans for building heritage hotels, 3-4-5-star hotels, and all standard hotels. Over the years, more and more tourism destinations have appeared in India. Tourism was enhanced by undertaking plans like introducing camping sites, paying guest schemes for affordable and hygienic accommodation, craft villages, financial assistance for fairs and festivals, cultural centres, tourist trains, river cruises, etc.

The 8th 5-year plan (1992-1997) emphasised the participation of the private player in the industry. Technological advancement and internet networks launched online booking of trips and facilitated research to choose destinations. India also familiarised its online presence to world travellers. The government drafted the National Strategy for the Promotion of Tourism in 1996. In 9th 5-year plan period, the tourism department focused on arranging economic products and marketing, encouraging entrepreneurship, and coordinating associated tourism agencies. Standing in the 21st century, India enjoys tourism's advanced, diversified, digitalised, sustainable, and responsible picture. The public and private sector involvement assists the expansion of hospitality services through luxury hotels, resorts, etc. Presently (as on 30th April 2023), there are 8 categories of approved hotels in India. These are – 1-star (18), 2-star (23), 3-star (524), 4-star with alcohol (212), 4-star without alcohol (143), 5-star deluxe (172), 5-star with alcohol (143), and 5-star without alcohol (56) [22]. There are total 100980 rooms in 1291 hotels in the country. The department announced direct investment of up to 51% of foreign equity and 100% of non-resident Indian investment in the sector. The National Tourism Policy of 2002, coinciding with the 10th 5-year plan, recognised the industry for financial development and set norms for advancement in the travel industry. For this purpose, the centre identified seven major zones (7'S), named i) Swagat (welcome), ii) Soochna (information), iii) Suvidha (facilitation), iv) Suraksha (security), v) Sahyog (cooperation), vi) Samrachna (infrastructural development), vii) Safai (cleanliness). The 'S' - Safai has just been added to the 6'S of Tourism Policy, 1982. A multifaceted strategy was adopted considering innovative marketing ideas, erecting hospitality skills, creating tourism circuits, and enforcing experimental development projects. The centre planned its works and expressed in the Tenth Five Year Plan (2002-2007), where a special focus was put on skill enhancement through training in the hospitality and catering industries. Since then, many institutes of hospitality, management, and catering have evolved in India.

The government's objective of raising inbound tourism has become very successful through the appearance of digital platforms like MakeMyTrip, Yatra, Cleartrip, etc., as they support fast and easy confirmation of domestic and foreign trips. Indian market is therefore, continuously enlarging with new emerging tourism products like agro-rural tourism, golf tourism, voyage tourism, medical tourism including ayurveda, yoga, and wellness, eco-tourism including wildlife and sustainable tourism, adventure tourism (trekking, river rafting, skiing, paragliding, mountain climbing, etc.), poll tourism, and so on. A special package has come up for foreign tourists to give them the experience of poll fervour, attending political rallies, interacting with representatives of political parties, along visiting major tourist attractions,

and this 'poll tourism' would be promoted with the help of tour operators across the country. Travel agencies design and operate such types of packages. Subsequent large fund allocation has been seen in the Eleventh Five Year Plan (2007-2012) period. It extended 2002s policy to make a strong collaboration among federal, state, and commercial sectors. Simultaneously, the Ministry of Tourism was undertaking significant initiatives to promote tourism in the nation. Later, NITI (National Institution for Transforming India) Ayog as the apex public policy think tank of the Government of India and nodal agency started the economic policy-making process following the bottom-up approach to foster the development process. Its policy initiatives for tourism industry aiming to make sustainable, inclusive, and tech-driven tourism, include aspects like aggressive marketing, private investment, empowering the local economy through rural tourism, etc.

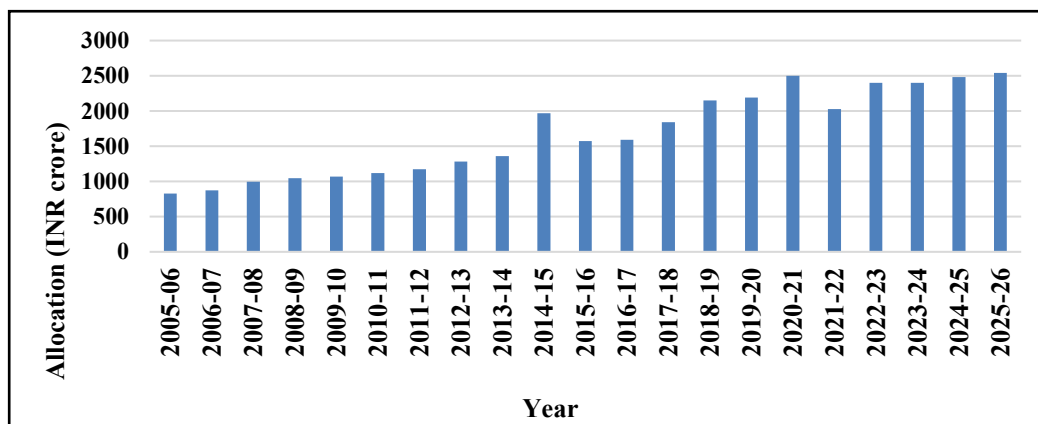
The Twelfth Five Year Plan (2012-2017) adopted the approach 'Pro-Poor Tourism' that ensures the accessibility of net benefits of tourism to the impoverished. The village areas, considered in government's pro-poor program, can harness the boon of tourist potentiality through homestay facility. Rural tourism, offering the homestay experience to tourists, positively affects local economy, socio-cultural condition and multifaceted development in concerned areas. Homestay concept has been emerged in rural tourism and hospitality sector as a perfect replacement for hotel accommodation. The present era is dominated by mobile and social media, and hence, these bring revolution in tourism. The latest development is the emergence of online platforms such as Airbnb. These stages connect hosts and guests through variety of accommodation. Homestays are currently in trend on Airbnb, where tourists get local experience, home and culture. Alongside, mass media, road shows, television, and external media have hugely cooperated with the government in bringing public attention to the newly launched 'Atithi Devo Bhavah' program.

Organising international events, conferences, and festivals in India amalgamated diverse regions and counties. It has led India to increase its investments in airport infrastructure, railway networks, highways, roads, and expressways to connect major tourist destinations. Open skies policies and comfortable travel facilities with upgraded connectivity created more convenient accessibility to and within India. To make last-mile connectivity with the destinations, the Ministry of Railways has projected Vande Bharat Trains, Sri Ramayan Yatra special trains, etc., and allocated Vistadome coaches, enabling passengers to experience spectacular views. Nowadays, how people plan and experience tourism hugely depends on digital platforms. Various media, blogs, and advertisements make destination and travel details accessible to visitors. COVID-19 has accelerated digital transformation in all sectors. The travel and hospitality sector is servicing contactless payment through UPI, QR code-enabled online ordering, keyless rooms, digital menus, Digi Yatra (entry and exit on facial recognition), robot services, and many others. As of 30th April 2023, there are 176 start-ups, 795 tour operators, 104 tourist transport operators, and 233 travel agents in India [22] to conduct tour programs and to provide travel packages (e.g., Royal Rajasthan Tours, Ramayana

Trails, etc.). For the convenience of tourists, a 24/7 toll-free helpline has been generated, and tourist information is being supplied in 12 international languages through this number. Recently, India hosted the world's largest religious gathering, 'Maha Kumbh Mela' at Triveni Sangam in Prayagraj, Uttar Pradesh. The government has successfully managed this large-scale event, scheduled from 13th January to 26th February 2025. It is the rich cultural heritage of India, where more than 66 crores of devotees have taken a holy dip in the river, as per the released data of 26th February 2025 [28]. UNESCO recognised this pilgrimage festival as a part of the 'Intangible Cultural Heritage'. Note that without a destination, tourism cannot be possible. A developed and sustained destination requires three fundamental features, and hence, tourism infrastructure development needs a 3'A approach, i.e., 'A'ttraction, 'A'ccessibility, and 'A'ccommodation.

The rising allocations over the years prove that the central and state governments are prioritising the development of the tourism sector. The allocation for tourism under the Union Budget of India is in Figure 5.

Fig. 5. Union Budget Allocation to Tourism in India, 2005-06 to 2025-26



Source: www.indiabudget.gov.in and compiled by author

The Ministry of Tourism got a fund allocation of Rs. 828.2 crore in the Union Budget of 2005-06. It has reached Rs. 1573.07 crore in 2015-16 and then to Rs. 2541.06 crore in 2025-26. Recognising the employment-led development eventuality of tourism, the government has allocated this quantum intending to enhance infrastructure, skill development, and travel facilitation [25].

4. Discussion

4.1. Growth and Performance of Indian Tourism Industry

In the early stage, India promoted its culture, history, and heritage as tourism products. It is a fact that the number of foreign tourists arriving in the early 1950s was too small. The primary obstacle behind it was the inefficiency in marketing tourism products. Still, initiatives to raise tourist inflow and some financial support from the government, helped the industry to do well.

The two major influencing factors for the slow growth of arrivals in the 1960s were the Sino-Indian war and the failure of Indian tourism overseas offices in campaigning advertisements for tourism resources. In the late 1960s improving infrastructure and tourist services led to further growth in the 1970s. Again, some financial obstacles prevented the growth in the period 1981 to 1991.

The disappointing performance of Indian overseas tourist offices and Air India in arriving at the targets given to them supported the slump in tourism growth. Another demotivating factor in 1991, was the warning of the U.S. Department of States to American travellers not to travel to Kashmir and Punjab. This travel advisory was issued in June 1991. For India, 1991 was the time of economic liberalisation, which is also known as LPG (Liberalisation, Privatisation, and Globalisation) reforms. It brought a significant growth in tourist arrivals in the country by making travel and exploring by foreigners much easier. But the governmental approaches of that time were on a depthless and weak platform created by conflict, political instability, inadequate infrastructure, and contradictory policies. Despite challenges, tourism in India is flourishing and attracting millions of tourists from all over the world each year. However, international travel has a significant contribution to the foreign exchange reserves of a country. Inbound tourism, therefore, raises foreign exchange earnings. The two variables, FTAs and FEEs carry a significant and strong positive relation in India [7]. Therefore, attracting more foreign tourists to India can effectively increase the foreign exchange earnings of the country. FTAs, creates a long-run effect on a national economy using its employment and GDP-generating capacity [9]. There is a positive but weak relationship between GDP growth and tourism [5]. It clearly shows a lesser impact of foreign tourism revenue growth on India's economic growth.

Since that time of independence, there have been many policy initiatives to attract international tourists. Sometimes, it leads to the undervaluation of domestic tourism. Here, it is necessary to say that domestic travel and tourism are the backbone of the economic progress of Indian tourism. It not only supports tourism growth but also creates linkages between various businesses, enhances the local economy, and reduces the leakages in the system. The post-pandemic recovery is fast in domestic tourism as it bounced back rapidly compared to the international one. The main drivers of the growth in domestic tourism were demand for pilgrimage, wildlife experience, sightseeing, sports, photography, adventure, etc., economic progress of the nation, rising disposable incomes, leave entitlement in the job, marketing through television, tour operator & agency, and weakness of the Indian rupee against foreign currencies [6]. Similarly, outbound tourists are also motivated by attractive holiday packages, desire, and resources to travel and visit abroad. Middle-class people are major contributors to outbound tourism since they started to enjoy their disposable income generated as a result of faster economic growth in the nation's economy. The uninterrupted progress in INRs over the years indicates chances of occurring over imports. India can overcome the situation either by attracting more international tourists or by motivating Indians to prioritise their own country

than abroad. To reduce the current account deficit and to create a glowing economic profile, India has to earn more share in world tourism especially, in terms of tourism inflows, which are still negligible [3]. The second option deviates people towards 'Domestic Tourism' reducing the departures. "Dekho Apna Desh" (Look at Your Own Country) Campaign (2020) was to encourage nationals to explore at least 15 sites within the country by 2022 to boost tourism and accelerate the development of facilities in the destinations within the country. An additional campaign, "Paryatan Parv" was launched to outspread the essence of "Tourism for All".

The current statistics depict resilience and robust growth of the Indian tourism sector, reflecting an upward trend in domestic and international tourism. Apart from the fragile nature of the tourism business, it has the potential to revive and grow at the same pace as earlier.

4.2. Development in the Indian Tourism Industry

Initially, the budgets for development were small, and the scale of operation was limited. Indian government gave importance primarily to building tourism infrastructure. But the absence of comprehensive policies and a clear strategic vision created hindrances in the path of development. Still, India was becoming a perfect choice for a heritage and cultural hub in the global tourism market during the 1970s and 1980s. Again, the policies of that time were largely fragmented and a poor infrastructure still prevailed outside the major tourist destinations.

Destination development started with the coming of adventure lovers and coastal and historical sites were developing rapidly leaving rural and offbeat areas behind creating an uneven development across the country. In the early 21st century, the topic of sustainability was of less concern at that time. Although tourism policies of that period were more robust, major disputes regarding tourist infrastructure and facilities were happening in the less-visited areas as over focus was given to few popular destinations. Tourism-friendly policies, especially the development of infrastructure in transportation, accommodation, and attractions in thematic tourism circuits acted as a remedy.

Later, the centre of attention has been shifted to sustainable and responsible tourism. The Tourism and Culture Division of NITI Ayog strategically guides the Union and State Governments in the development of tourism through responsible and sustainable tourism policies with special focus on niche, eco, and wellness tourism, infrastructure and capacity development, increasing tourist footfall, and developing, preserving, and promoting arts, culture, and heritage of the country [37]. An over-tourism is bringing environmental degradation with a reduction in tourist experience and hence, responsible tourism is appropriate here to make a balance between environment, culture, and economic benefits. It will then assist in maintaining sustainability. In the post-COVID timeline, the promotion of

tourism in rural and other niche areas remains the key to alleviate socio-economic gaps in the country.

5. Conclusion

The diversified beauty of the Indian subcontinent (until 1947) and the post-1947 Republic of India is the base of visitor attractions in the world. Indian Subcontinent has had experiences of travel and tourism, since ancient times and it holds massive tourism products that serve the nation with its revenue-generating capacity. In India, tourism has gradually evolved from a small market to a large global industry. During this process, the country was adapting to world trends, dealing with internal challenges, and moving forward development of the tourism industry. The transformation of the industry got support from various policy initiatives along with the influence of political, economic, and social factors. India's capacity to be a leading global destination ensures sustainable growth and development in the sector. There are still some challenges faced by the tourism industry like infrastructure gaps in remote regions, issues of overcrowding in particular spots, safety and security concerns especially for women and foreign visitors, problems of regional disparities, and fluctuation due to seasonal variation. The industry therefore needs inclusive and innovative strategies, even implementation of digital transformation, and sustainable practices to move forward in playing a crucial role in the Indian economy.

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