

DEMAND AND SKILL GAP STUDY

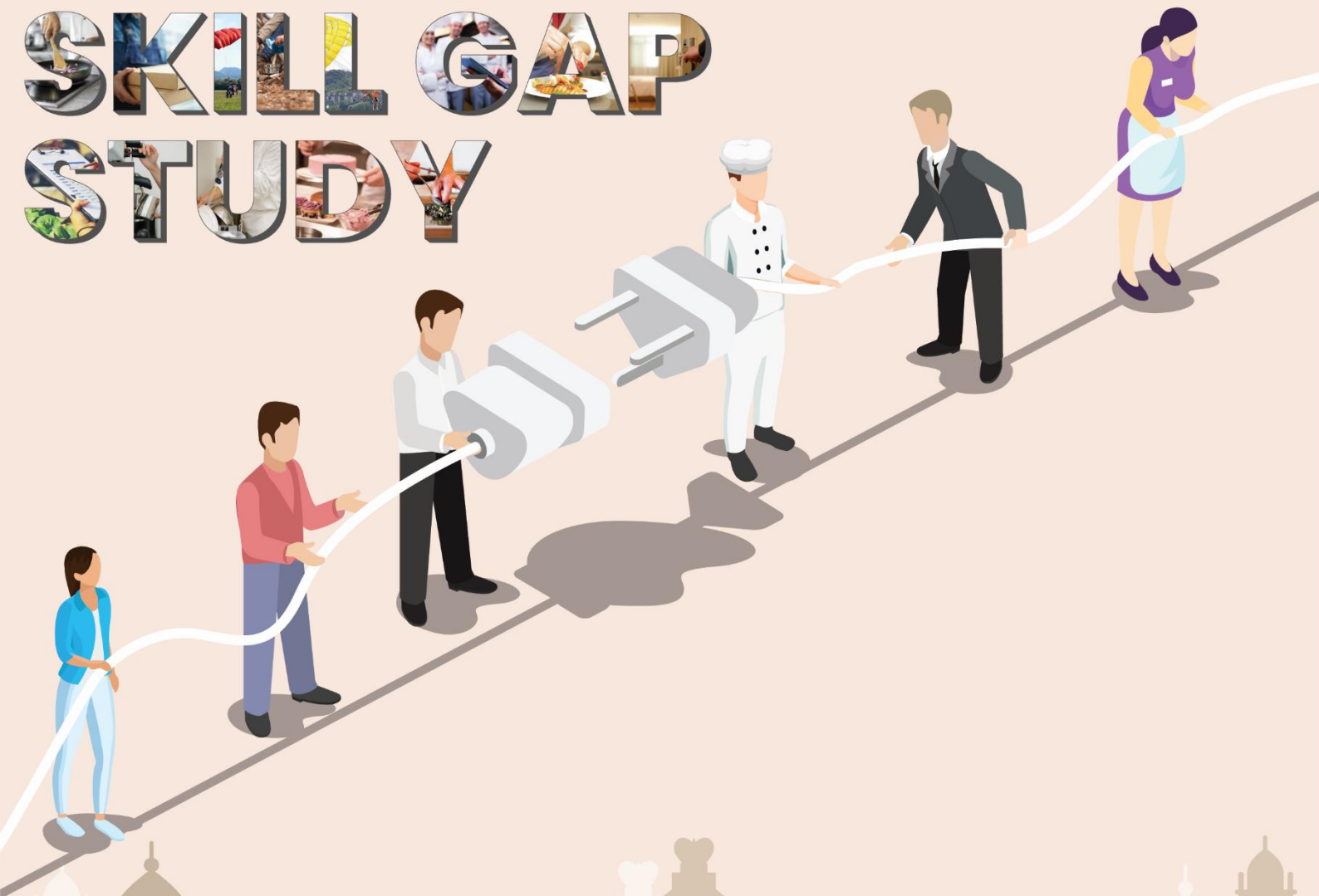


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List of Abbreviations

List of Abbreviation	Details
AI	Artificial Intelligence
AISHE	All India Survey on Higher Education
AICTE	All India Council for Technical Education
CAGR	Compounded Annual Growth Rate
FDI	Foreign Direct Investment
FEE	Foreign Exchange Earnings
FM	Facility Management
GDP	Gross Domestic Product
GER	Gross Enrollment Ratio
GSVA	Gross State Value Added
IHM	Institute of Hotel Management
ITI	Industrial Training Institute
LFPR	Labour Force Participation Rate
MoT	Ministry of Tourism
MSDE	Ministry of Skill Development and Entrepreneurship
NEET	Neither in Education, Employment, or Training
NSDC	National Skill Development Corporation
PLFS	Periodic Labour Force Surveys
PwC	PricewaterhouseCoopers Services LLP
RPL	Recognition of Prior Learning
RTD	Recruit-Train-Deploy
THSC	Tourism and Hospitality Sector Council
UNFPA	The United Nations Population Fund
WPR	Worker Population Ratio

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Executive Summary

The Context

Economic Outlook and Employment Scenario

In 2023, India, became the world's most populous and fifth-largest growing economy with 1.4 billion population and a 7.5 percent share in global Gross Domestic Product (GDP)¹. International Monetary Fund data projections estimate that India's GDP is expected to rise from US\$ 3.4 trillion in 2022 to US\$ 5 trillion by 2028, positioning it as the third largest (in nominal terms) global economy². The services sector within the country has grown by 8 percent at a Year-over-Year (YoY) basis, and it has been contributing 66 percent to GDP along with creating 28 percent of all jobs³. With a GDP contribution of US\$ 191 billion (6.7 percent of GDP) in 2019, tourism and hospitality sector was the second-largest contributor to India's services sector⁴. Despite a pandemic-induced decline in 2020, the industry rebounded with a 45 percent YoY growth in 2021 and 21 percent YoY growth in 2022, contributing US\$ 215 billion in 2022⁵. Forecasts predict the industry's impressive trajectory, reaching a substantial GDP of US\$ 512 billion by 2029⁶. India's tourism sector has also witnessed notable growth in foreign exchange earnings (FEE). Averaging around US\$ 17,000 million from 2011 to 2015, FEE peaked at US\$ 30,000 million in 2019 before the pandemic. In 2020, FEE plummeted by 78 percent to US\$ 6,958 million. However, there was a remarkable 143 percent increment in FEE in 2022 compared to the pandemic-hit year of 2020⁷.

The tourism and hospitality sector's growth is primarily fueled by its five core sub-sectors: travel and tourism, hotels, food services, facility management, and cruise liners. In 2021, India's travel and tourism sub-sector contributed 5.8 percent to GDP, a rise from 4.3 percent in 2020. India secured the sixth position globally in the contribution of the tourism sector to GDP, according to the World Travel and Tourism Council⁸. The hotel industry witnessed a 47 percent contraction in the April-June 2020 period due to the COVID-19 pandemic, however, the sector rebounded in 2023, achieving an improved occupancy rate of 59-61 percent, up by 15-17 percentage points from 2022⁹. The food services sub-sector, which is valued at approximately US\$ 77.5 billion in 2024, is set to increase to around US\$ 125 billion by 2029, with an anticipated Compound Annual Growth Rate (CAGR) of about 10 percent¹⁰. Similarly, India's facility management market is estimated to be US\$ 148 billion in 2024 and is further projected to grow to US\$ 212 billion by 2029, at an expected CAGR of 7.4 percent during this time period¹¹. The cruise tourism constitutes about 1 percent of the global travel industry, and has exhibited steady growth, especially in contemporary and premium cruises¹². India, acknowledging the economic impact and job creation potential, intensified its focus on the cruise sector. India experienced rapid growth of overall 35 percent in its cruise market over the last three years since 2021 with strategic initiatives like constructing new terminals, regulatory enhancements, marketing engagements, and relaxing cabotage rules¹³.

¹ Ministry of Finance, Government of India. (2023). Economic Survey 2022-23. Government of India, Department of Economic Affairs, Economic Division, New Delhi. Retrieved from: <https://www.indiabudget.gov.in/economicsurvey/doc/echapter.pdf>; The World Bank. (2023). The World Bank in India. Retrieved from <https://www.worldbank.org/en/country/india/overview>; Statista (2023). India: Share of global gross domestic product (GDP) adjusted for Purchasing Power Parity (PPP) from 2018 to 2028. Retrieved from: <https://www.statista.com/statistics/271328/indias-share-of-global-gross-domestic-product-gdp/>

² International Monetary Fund. (2024). GDP, Current Prices. Retrieved from: <https://www.imf.org/external/datamapper/NGDPD@WEO/OEMDC/ADVEC/WEOWORLD/IND>

³ Department of Economic Affairs, Government of India. (2023). Half Yearly Economic Review 2023-24. Retrieved from: https://dea.gov.in/sites/default/files/Half-Yearly%20Economic%20Review%20FY24_November%202023_0.pdf; IBEF. (2023). Services sector in India. Retrieved from <https://www.ibef.org/industry/services>

⁴ In India's 2022-23 Budget, it was reported that Trade, hotels, transport, communication, and broadcasting services contributed 17 percent to the country's services sector. India Brand Equity Foundation Report 2023. Tourism and Hospitality Industry in India 2023. Retrieved from https://www.ibef.org/download/1707292245_Tourism-and-Hospitality-December-2023.pdf; This was the second-largest contribution after the 21 percent from Financial, real estate, and professional services, which also includes the information technology sub-sector. Retrieved from: <https://www.indiabudget.gov.in/budget2022-23/economicsurvey/doc/eschapter/echap09.pdf>

⁵ India Brand Equity Foundation Report 2023. Tourism and Hospitality Industry in India 2023. Retrieved from https://www.ibef.org/download/1707292245_Tourism-and-Hospitality-December-2023.pdf

⁶ India Brand Equity Foundation Report 2023. Tourism and Hospitality Industry in India 2023. Retrieved from https://www.ibef.org/download/1707292245_Tourism-and-Hospitality-December-2023.pdf

⁷ Ministry of Tourism. (2023). Tourism Statistics at a Glance. Retrieved from: https://tourism.gov.in/sites/default/files/2023-07/India%20Tourism%20Statistics%20at%20a%20glance%202023%20-%20English%20version_0.pdf

⁸ World Travel and Tourism Council. (2020). Travel and Tourism Economic Impact. Retrieved from <https://wtcc.org/Portals/0/Documents/Reports/2022/EIR2022-Global-percent20Trends.pdf>

⁹ Modor intelligence. (n.d.). Hospitality Industry in India Size and Share Analysis - Growth Trends and Forecasts (2024 - 2029). Retrieved from <https://www.mordorintelligence.com/industry-reports/hospitality-industry-in-india>

¹⁰ Modor intelligence. (n.d.). India foodservice market size and share analysis - Growth trends and forecasts up to 2029. Retrieved from <https://www.mordorintelligence.com/industry-reports/india-foodservice-market>

¹¹ Modor intelligence. (n.d.). Facility Management Industry in India Size and Share Analysis - Growth Trends and Forecasts (2024 - 2029). Retrieved from: <https://www.mordorintelligence.com/industry-reports/india-facility-management-market>

¹² Ministry of Ports, Shipping and Waterways. (2023). Maritime India Vision. Retrieved from: https://shipmin.gov.in/sites/default/files/Maritime%20Amrit%20Kaal%20Vision%202047%20%28MAKV%202047%29_compressed_0.pdf

¹³ Ministry of Ports, Shipping and Waterways. (2023). Maritime India Vision. Retrieved from: https://shipmin.gov.in/sites/default/files/Maritime%20Amrit%20Kaal%20Vision%202047%20%28MAKV%202047%29_compressed_0.pdf

With tourism and hospitality industry's profound impact on GDP, it is important to note its consequential role in employment generation. The tourism and hospitality sector employed 39 million workers in 2019-20 and is further expected to employ 53 million people by 2029¹⁴.

Growth Drivers of Tourism and Hospitality Industry

India's tourism and hospitality sector's growth is propelled by a significant surge in Foreign Direct Investment (FDI) over the past two decades. Between 2014 and 2022, FDI inflows in the hotel and tourism sub-sectors exceeded US\$ 9 billion, surpassing the FDI received from 2000 to 2014, which totaled over US\$ 7 billion¹⁵. The government's allowance for up to 100 percent FDI has attracted substantial investments in the industry¹⁶. Further, the Ministry of Tourism actively promotes and diversifies niche tourism products, aiming to position India as a year-round destination, through strategies such as the 'Incredible India' campaign, development of landmark destinations, and initiatives like Dekho Apna Desh and Vibrant Village Programme. Various other strategies, including National Strategies on Sustainable Tourism, Eco Tourism, Medical and Wellness Tourism, Adventure Tourism, and Rural Tourism, aim to enhance different facets of tourism. A facilitative visa regime, including the extension of e-visa facilities to 165 countries, contributes to inbound tourism.

Future of Tourism and Hospitality

In response to increased government investment and strategic growth drivers, a wave of new tourism paradigms is emerging. Given India's diverse landscapes, adventure tourism is one of the strategic focus areas. A national strategy on adventure tourism aims to boost India's ranking in the Adventure Tourism Development Index¹⁷. The Ministry of Tourism also actively collaborates with institutions to offer training, fostering job creation and entrepreneurship opportunities in this sector. Further, India being home to the sixth-largest number of UNESCO Natural Heritage sites globally, prioritizes eco-tourism. Eco circuits identified under the Swadesh Darshan Scheme and the Amrit Dharohar scheme showcase the commitment to enhancing eco-tourism opportunities¹⁸. India also ranks 10th globally on the Medical Tourism Index. The government's budget allocation for health and well-being, along with initiatives like the 'Heal in India' campaign, underlines the government's commitment to promoting these sectors. Despite challenges during the pandemic, the wellness and medical tourism sector is poised for substantial growth, with a projected CAGR of 21.1 percent from 2019-20 to 2026-27¹⁹.

Technological advancements are changing the way the tourism and hospitality industry operates. For instance, social media, QR codes, and contactless payments make it easier for customers and businesses to initiate and complete transactions. Biometric systems, such as fingerprint or face scanning make hotel stays more convenient for guests. Facial recognition also helps restaurants by automatically transferring bills to guest rooms. Tourism and hospitality firms are also increasingly using data to understand customer preferences, reduce costs, and improve their efficiency. These changes point towards how the industry is adapting to meet evolving customer needs.

Skilling Scenario in Tourism and Hospitality Industry

As the tourism and hospitality industry undergoes transformative changes, skill development becomes essential to equip the workforce to navigate and adapt to evolving technological dynamics. However, according to the Periodic Labour Force Survey (PLFS) 2022, the existing training situation in the tourism and hospitality sector indicates a notable gap, with only 1 percent of the workforce in the sector having received any form of training in 2022. Further, 83 percent of those trained were in full-time programs, while the remaining 17 percent were in part-time programs. Of the trained workforce, 22 percent had undergone training for 6 months or more but less than 12 months.

Recognizing the evolving skilling requirements, the Tourism and Hospitality Sector Skill Council (THSC) commissioned a study to make available credible and fresh data about the actual skill gap in this industry; top job roles within the sub-sectors of tourism and hospitality; expected incremental manpower requirement in tourism and hospitality sector; ascertain the industry's willingness to pay higher salaries to the formally skilled manpower in relation to the untrained workforce, and understand the skill gap in the industry in light of the evolving sector.

14 India Brand Equity Foundation Report 2023. Tourism and Hospitality Industry in India 2023. Retrieved from https://www.ibef.org/download/1707292245_Tourism-and-Hospitality-December-2023.pdf.

15 Invest India. (2023). FDI and Tourism: A Sustainable Alliance. Retrieved from <https://www.investindia.gov.in/team-india-blogs/fdi-and-tourism-sustainable-alliance>

16 Invest India. (n.d.). Tourism and Hospitality. Retrieved from <https://www.investindia.gov.in/sector/tourism-hospitality>

17 Ministry of Tourism. (2022). Strategy for Adventure Tourism. Retrieved from: <https://tourism.gov.in/sites/default/files/2022-09/National%20Strategy%20for%20Adventure%20Tourism%202022.pdf>

18 Ministry of Tourism. (2022). National Strategy for Ecotourism. Retrieved from: <https://tourism.gov.in/sites/default/files/2022-09/National%20Strategy%20for%20Ecotourism%202022.pdf>

19 IBEF. (2023). Indian Tourism and Hospitality Industry Analysis. Retrieved from <https://www.ibef.org/industry/indian-tourism-and-hospitality-industry-analysis-presentation>

PricewaterhouseCoopers Services LLP (PwC) had therefore been engaged by THSC to undertake this study, covering 20 states and 6 Union Territories (UTs) across India.

Scope and Methodology

The main objective of this skill gap study was to explore the labour market and skilling landscape and undertake a workforce requirement and skill gap assessment study in the Indian tourism and hospitality sectors. This would lay the groundwork for developing the assessment and an action plan to address workforce requirements for relevant and emerging job roles and address potential employment opportunities in the future.

To address the above-mentioned objectives, this study followed a four-step approach: (a) a review of existing literature on economic trends, sector-specific indicators (GDP contribution, growth patterns, COVID-19 impact, employment), enabling government policies and the skilling ecosystem, and evolving nature of the tourism and hospitality industry; (b) quantitative primary surveys with 10,158 youth from four categories namely, students in tourism and hospitality or related sectors, youth engaged in waged and/or salaried jobs or self-employment or entrepreneurial ventures within the industry, or youth engaged in neither education, employment, or training, and 553 employers (across 5 sub-sectors identified as Hotels, Food Services, Tourism And Travels, Facility Management, And Cruise Liners – Cruise Ships) and; 72 qualitative in-depth interactions with a diverse range of stakeholders, including 7 government ministries, 29 educational institutions, 26 training service providers, and 10 industry associations ; (c) analysis of periodic labour force survey (2017-2022) to estimate workforce needs within the industry, and (d) synthesis of findings by collating all the above-mentioned information.

The study attempted to gather and analyze evidence to inform and respond to the following broad questions:

- i. What are the present and projected trends for the tourism and hospitality industry in India, particularly concerning its various subsectors, occupations, functions, and patterns of hiring? How is current employment distributed in tourism and hospitality's sub-sectors within India?
- ii. What are the primary job roles within each sub-sector, and which roles are considered in high demand, based on the surveys conducted?
- iii. What is the expected incremental manpower requirement in the tourism and hospitality sector? What is the volume of labourforce that can be potentially trained to work in the tourism and hospitality sector?
- iv. How willing is the tourism and hospitality industry to pay higher salaries to formally skilled workforce compared to their current practice of employing and subsequently training the unskilled workforce?
- v. What are the skilling requirements of the workforce in response to technological and other changes, and how do existing sources of skilling and training through employers align with these needs? Furthermore, what is the youth's perception of these changes in the industry?

Key Findings

This report provides a thorough understanding of India's tourism and hospitality sector, examining the perspectives of youth on career aspirations, training needs, and their understanding of the impact of technological advancements on their skilling and employment prospects. Additionally, the report offers insights into employers views on recruitment practices, skill requirements, training facilities, and the impact of technology on employment and skill development within the industry.

Youth Survey Findings

Profile

The youth surveys involved interviews with 10,158 young individuals, spanning 121 districts across 20 states and 6 Union Territories of India. The survey covered four distinct groups of youth: students actively pursuing education in tourism, hospitality, or related fields (or the 'students in education/training'), young individuals with 0-3 years of industry work experience and working as waged/or salaried workers (or the 'Waged/Salaried youth'); youth engaged in self-employed/entrepreneurial work within the industry (or the 'self-employed youth'), and youth not currently engaged in education, employment, or training (or 'NEET'). Gender-wise, 56 percent of the respondents were males, and 44 percent were females. The average age of the respondent youth was 25 years, with 57 percent of the youth falling in the 15 to 25 years age range. In terms of geographical distribution, 55 percent of surveyed youth was from urban areas, 30 percent from rural regions, and 15 percent from semi-urban locales.

Students in education and training formed 25 percent (2,708 individuals) of the youth sample. When inquired about the educational background of the students, we found that 35 percent were pursuing their course of study related to

in tourism and hospitality, 6 percent in electricity and water utility, 6 percent in financial services, and 5 percent in information, communication, and technology (ICT). Of those pursuing education in the tourism and hospitality segment, 45 percent youth was enrolled in courses related to the hotel sub-sectors, while others reported pursuing their education in other sub-sectors such as food services, facility management, tourism and travel, and cruise liners.

Regarding the training engagement of those studying in the tourism and hospitality sector, 44 percent were enrolled in university, 35 percent in long-term training, and 21 percent in short-term training. Gender-wise, 37 percent of males were engaged in long-term training; 45 percent females were enrolled in university. Of those undertaking short-term training, 36 percent were pursuing a short-term course for a course related to the hotel sub-sector, 34 percent for facility management, 13 percent for food services, and 17 percent for tourism and travel. In terms of their work preferences, we found that around 61 percent of the students expressed readiness to enter the workforce (68 percent males, 53 percent females). A majority of these youth (77 percent) preferred waged or salaried jobs, while 23 percent expressed an interest in self-employment. When asked about their sectoral career preferences, 36 percent aspired to work in tourism and hospitality, 20 percent in education, and 10 percent in the electricity and water utility sectors. Among those aspiring to join the tourism and hospitality industry, 51 percent aspire to work in hotels, 31 percent in tourism and travel, and 25 percent in facility management. The most appealing roles within these sectors included assistant chef and duty manager in hotels, adventure travel guide and customer service executive in tourism and travel, and billing executive and facility manager in facility management.

Waged or salaried youth working in tourism and hospitality industry formed 24 percent (2,458 individuals) of the youth sample. In terms of youth's sectoral engagement, we find that 31 percent of the workers were employed in facility management, 26 percent in hotels, and 24 percent in food services. While enquiring about monthly earnings of wage and salaried workers, we found that 89 percent of youth was willing to disclose their earnings. Out of these young individuals, 43 percent earned between INR 5,000 and INR 20,000, 46 percent earned between INR 20,001 and INR 35,000, and only 12 percent earned above INR 35,000 on a monthly basis. When inquired about workers about their working hours, we found that on average, 62 percent of workers worked 6 days per week. Although 80 percent stated that the designated working hours per day were 8 hours, only 39 percent adhered to this, with 61 percent working more than 8 hours per day, which often extended up to 15 hours per day. The average working hours stood between 10-11 hours per day. Only 41 percent of those working overtime accounted for receiving additional pay. In terms of contract coverage, the overall coverage was low, with 47 percent of workers lacking any contract and only 53 percent having either written or verbal contracts. However, contract coverage varied significantly based on skill levels. Specifically, 65 percent of unskilled workers lacked any form of contract, compared to 46 percent of semi-skilled workers and 34 percent of skilled workers.

Self-employed youth working in tourism and hospitality industry formed 25 percent (2,586 individuals) of the youth sample. Of these 25 percent, 39 percent were working in food services, followed by 28 percent in hotels, 21 percent in tourism and travels. For those in food services, 45 percent were running a business in fast food and quick service restaurants. Within the hotels sector, 42 percent of the youth was running budget hotels. In the tourism and travel sector, 48 percent of the surveyed youth was running business as tour and transport operators. Overall, of the 25 percent youth engaged in self-employed or entrepreneurial ventures, 73 percent were self-employed while only 27 percent were entrepreneurs. Among self-employed individuals and entrepreneurs, 89 percent youth willingly disclosed their monthly earnings. Within this group, overall close to half (i.e. 48 percent) reported earning between INR 5,000 and INR 20,000 monthly, while nearly one-third (i.e. 31 percent) reported earning between INR 20,001 and INR 35,000 monthly.

Youth categorized as Neither in Education, Employment, or Training (i.e. NEET) formed 25 percent (2,506 individuals) of the youth sample. Over 36 percent of youth under the NEET category were awaiting results or applying for further education, and 35 percent of them identified scarcity in local jobs as reasons for continuing in NEET category. When analyzing the reasons behind the NEET status of youth across gender categories, we found no significant differences. The study further inquired whether these youth was willing to work and we found that overall, 61 percent of the NEET youth expressed willingness to work. A gender-wise analysis suggested that 67 percent of male were willing to work, whereas female were 55 percent. Among the 61 percent of NEET youth willing to work, 91 percent had a clear preference for working in either a waged or salaried job or as an entrepreneur. Within this group of 91 percent individuals, 76 percent were seeking a wage-salaried job, while the remaining 24 percent were interested in self-employment or entrepreneurial work. The findings additionally indicated that a significant 87 percent of youth was actively searching for a job, with no notable gender-based differences observed. Within this actively job-seeking

group, 42 percent had been engaged in the job search for the past 6 months preceding the survey, while 38 percent had been actively looking for a year.

Regarding the industry preferences of NEET youth who expressed willingness to work, they were asked to choose among the sectors directly related to tourism and hospitality (electricity/utility, wholesale and retail, financial services, IT and communication (ICT), education, real estate, administrative services, food and beverage). It was observed that tourism and hospitality sector was highly preferred by the NEET youth, with 47 percent expressing a preference to work in this sector, followed by wholesale and retail (9 percent) and electricity and water utility (8 percent) sectors. Within tourism and hospitality, hotels emerged as the predominant choice, with 61 percent selecting this segment, followed by 36 percent for food services, 18 percent for facility management, 19 percent for tourism and travels, and only 6 percent for cruise liners. Youth willing to work in hotels preferred roles like assistant chef and bartender, while those in food services leaned towards positions such as assistant chef, barista executive, and food and beverage service associate. In facility management, billing executive, facility management executive and facility manager were the most preferred roles. In the tourism and travel segment, adventure travel guide and customer service executive (meet and greet) job roles were the top choices, and in cruise liners, assistant chef and chef de partie job roles stood out as the most attractive job roles.

Career aspirations of the youth

We further inquired about youth's career aspirations in 6 months succeeding the survey. Consequently, we report the type of career aspirations across each category of surveyed youth. Results indicate that out of the youth in education surveyed, 49 percent aspired for a salaried job in the 6 months succeeding their current education/course, 18 percent plan for entrepreneurship or self-employment, and only 16 percent aim for higher education in the next six months. Key determinants for their career choices included job security (34 percent), growth prospects (34 percent), and decent pay (30 percent). Similar trends are observed among NEET youth, emphasizing the importance of stability, professional advancement and remuneration. Wage and salaried youth exhibit diverse career aspirations, with 24 percent wanting to continue in their current jobs, 24 percent wanting to venture into entrepreneurship, and 5 percent wanting to prepare for government exams. Their career decisions were influenced by factors such as job security (33 percent), growth prospects (32 percent) and decent pay (30 percent). Of the self-employed youth, 55 percent aimed to continue their businesses, 36 percent desired a waged or salaried job and 5 percent preferred to stay at home in the next six months succeeding the survey. The primary influences of their choices included growth prospects, emphasized by 36 percent of self-employed individuals. Location proximity (31 percent) and opportunities for continuous learning and upskilling (27 percent) also play significant roles in shaping their career decisions.

We further try to understand youth's willingness to join the tourism and hospitality sector. We find that among the youth not currently employed in tourism and hospitality (i.e. students and NEET constituting 49 percent), 53 percent expressed willingness to work in the sector. In contrast, among the 51 percent already employed (waged or salaried youth or self-employed/entrepreneurship youth) in the industry, 59 percent intended to continue working in the same sector. Reasons for choosing or not choosing to join the sector vary, with those willing to join motivated by personal interest (67 percent), alignment with educational qualifications (48 percent), and a desire for a diverse and dynamic environment (32 percent). On the contrary, those unwilling to join the sector cited a preference for a different career path (49 percent), lack of alignment with educational qualifications (44 percent), a preference for more office-based work (23 percent), and concerns about the seasonal nature of jobs in the sector (23 percent) as deterrents.

We further tried to understand youth's willingness to join gig work and deduced that overall, 22 percent of the surveyed youth expressed interest in pursuing gig work, with students displaying the highest interest at 27 percent, followed by wage and salaried workers at 22 percent. Rural youth showed a slightly higher interest at 24 percent, while urban and semi-urban youth exhibit slightly lower interest at 22 percent and 19 percent, respectively. For those willing to join gig work, 53 percent highlighted the appeal of low entry barriers, 47 percent cite a lack of alternative employment opportunities, and 36 percent are motivated by the prospect of earning a higher supplemental income. Among the 55 percent expressing disinterested in gig work, key reasons included a perceived lack of structure in the work (42 percent), concerns about the absence of clear career progression opportunities (41 percent) and apprehensions about variable salary structures (40 percent).

Awareness about career counselling services

Overall, less than half of the surveyed youth (43 percent) were aware of the career counseling services available in their neighborhoods. 47 percent of the students demonstrated awareness compared to only 36 percent of NEET youth. The lack of awareness among NEET youth may contribute to their inactive status, as they might not be seeking

guidance for potential career paths or opportunities. No significant differences were observed across gender and rural or urban categories.

Among the 43 percent of youth aware of career counseling services, 65 percent utilized these services, with no significant differences across different youth categories. Key services utilized by these respondent youth included information on relevant vacancies (57 percent), advice on starting one's own business (48 percent), and guidance in job applications, including resume building and cover letter writing (47 percent). Among the 35 percent aware but not utilizing these services, only 20 percent expressed a desire to do so, citing reasons such as seeking information on relevant vacancies (54 percent), advice on starting their own business (47 percent), and guidance in job applications, including resume building and cover letter writing (46 percent).

Awareness about technological advancements

Over half of the surveyed youth (58 percent) were aware of expected changes in employment or skilling within the sector due to technological advancements. No significant differences were observed across various youth subsectors. Of those anticipating changes, 37 percent believed there would be a change in their skilling, 26 percent believed changes would be in employment, and 37 percent believed there would be changes in both skilling and employment.

Within those anticipating changes in skilling or both skilling and employment due to technological advancement, 67 percent expect a heightened focus on workforce readiness skills like digital literacy and resume writing in the teaching delivery. Additionally, 55 percent anticipate an emphasis on soft skills, 41 percent foresee increased attention to technical skills, and 28 percent expect a focus on entrepreneurial skills. 25 percent of respondents anticipate there will be an increased focus on computer programming and software skills, 19 percent expect practical teaching methods and 17 percent anticipate new study programs in digital technologies.

Among those anticipating changes in employment or both skilling and employment due to technological advancement, 34 percent believed there would be more job opportunities across sectors, 31 percent anticipated the elimination of some job opportunities, and 30 percent expected both the elimination/redefinition of existing jobs and the creation of new jobs at the general level. Regarding their own job prospects, 57 percent foresaw more and better methods of exchange and connectivity with colleagues, 54 percent anticipated more job opportunities to work remotely, and 39 percent expected fewer job opportunities due to displacement by machines/robots.

Awareness about skilling schemes and requirements

We further tried to understand the share of youth who were aware of skilling initiatives in the country. We found that over 50 percent of the youth was familiar with schemes like Recognition of Prior Learning (RPL), Deen Dayal Upadhyaya Grameen Kaushalya Yojana (DDU GKY), Sagarmala and Pradhan Mantri Kaushal Vikas Yojana (PMKVY), while slightly less than half were aware of Craftsmen Training Schemes (CTS), National Apprenticeship Promotion Scheme (NAPS), and Rural Self-Employment Training Institute (RSETI).

We further asked the youth if they were willing to undergo training for skill development in the tourism and hospitality industry. The findings indicated that nearly half of the surveyed youth (44 percent) expressed a willingness to undergo training in the tourism and hospitality sector, with students exhibiting a slightly higher inclination (48 percent). Among these, 44 percent of youth was willing to undergo training in the tourism and hospitality industry, 49 percent preferred short-term courses, 41 percent were interested in entrepreneurship-related courses, and 31 percent leaned towards long-term training programs. Within the group of 44 percent, 55 percent preferred part-time training, and 60 percent favored residential training. However, only 38 percent were willing to pay for the training with a median amount of INR 5,000. Further, in trying to understand the challenges the youth may face in undergoing training in the tourism and hospitality sector, we found that financial constraints were a significant concern for 55 percent of the youth.

Migration preferences

In terms of migration preferences, it was found that only 21 percent of the surveyed youth was willing to migrate from their native area for employment or other reasons. A higher percentage of males (24 percent) expressed willingness to migrate compared to females (17 percent). Among those willing to migrate, 56 percent preferred moving within their native state, 44 percent within India but outside their state and only 10 percent expressed a desire to migrate internationally. Within India, Karnataka (12 percent) is the most favored destination, followed by Uttarakhand (9 percent), Himachal Pradesh (8 percent), Assam (6 percent) and Bihar (6 percent). The primary drivers for youth migration were improved job and business opportunities (24 percent) and strong connections to family and the native community (23 percent).

Employer Survey Findings

Profile

Our primary survey with employers involved interviewing 553 employers, from the five sub-sectors identified – Hotels, comprising of 52 percent of the employers, Food Services (28 percent), Tourism – Tours and Travels (11 percent), Facilities Management (8 percent), and Cruise Liners – Cruise Ships (1 percent). Of the surveyed employers, 41 percent were working in the organized sector, while 59 percent in the unorganized sector. Further, the study encompassed employers from various industries and sizes, with micro-scale enterprises forming the majority at 44 percent, followed by small-scale (23 percent), medium-scale (21 percent), and large-sized enterprises (12 percent).

The study delved into various categories of firms within each sub-sector. Within the Hotels sub-sector, the majority were budget hotels (57 percent), followed by luxury and star hotels (27 percent), homestays (12 percent), and guest houses (5 percent). In the Food Services sub-sector, coverage included independent cafes (38 percent), fast food and quick service restaurants (30 percent), restaurant chains (14 percent), canteens and dhabas (12 percent), and outdoor catering (6 percent). Employers within the Facilities Management sub-sector belonged to various categories of hospitality-related services in malls (17 percent), theaters (12 percent), guesthouses (10 percent), corporate towers (48 percent), and hospitals (5 percent). In the Tourism- Tours and Travels sub-sector, three categories - tour operators and agents (31 percent), tour transport (42 percent), and tour and travel - adventure transport (24 percent)- were covered.

Workforce details

Within the firms surveyed, 36 percent of the workers were entry-level, 15 percent were mid-level workers, and the remaining were top-level workers. In terms of gender decomposition, the total workforce of the employees constituted 69 percent male workers and 31 percent female workers. Upon inquiry with employers on their hiring of migrant workers, 29 percent employers confirmed hiring the same. A firm-type level of analysis suggests that a larger share of unorganized firms (32 percent) hired migrant workers than organized firms (27 percent). A firm size wise analysis suggests that 43 percent of the medium-sized enterprises reported hiring migrant workers, followed by large-sized (35 percent) and small-sized (35 percent) enterprises. A sub-sector wise analysis suggests that 38 percent of the facilities management employers and 34 percent of hotel employers reported hiring migrant workers. A state-level analysis suggested that 40 percent employers hired migrant workers from Bihar, 25 percent from Uttar Pradesh, 19 percent from Maharashtra, 13 percent from Delhi, and 11 percent each from Gujarat and Madhya Pradesh.

Upon enquiring with about the attrition rate of workers in the last fiscal year (2022-23), employers reported an average attrition rate of 21 percent. There were no significant differences in attrition rates between organized (22 percent) and unorganized firms (20 percent). A sub-sector wise and firm size wise analysis suggested that Tourism – Tours and Travel employers and micro-sized enterprise employers reported an average attrition rate of 22 percent – highest across their respective categories. According to employers, the high attrition rate in the sector is primarily attributed to lower wages (cited by 49 percent of employers), anticipation of more lucrative job opportunities (cited by 49 percent of employers) and shifts in personal interests after 1-2 years of employment (cited by 33 percent of employers).

Within the firms surveyed, 36 percent of the workers were entry-level, 15 percent were mid-level workers, while remaining were top-level workers. In terms of the gender decomposition, the total workforce of the employees constituted 69 percent male workers and 31 percent female workers. Upon inquiring with employers about hiring migrant workers in their organizations, 29 percent confirmed that they hired migrant workers. A firm-type level of analysis suggests that a larger share of unorganized firms (32 percent) hired migrant workers than from organized firms (27 percent). A firm size wise analysis suggests that 43 percent of the medium-sized enterprises reported hiring migrant workers, followed by large-sized (35 percent) and small-sized (35 percent) enterprises. A sub-sector wise analysis suggests that 38 percent of the facilities management employers and 34 percent of hotel employers reported hiring migrant workers. A state-level analysis suggested that 40 percent employers hired migrant workers from Bihar, 25 percent from Uttar Pradesh, 19 percent from Maharashtra, 13 percent from Delhi, and 11 percent each from Gujarat and Madhya Pradesh.

Recruitment patterns and challenges

Our inquiry with employers regarding recruitment modes for entry-level workers revealed that 45 percent of the employers recruited workers from tourism and hospitality colleges, 42 percent relied on local community networks, 28 percent utilized employee references/other referrals, 25 percent each recruited from other colleges/universities which had a dedicated Tourism and Hospitality programs, and online portals. No notable variations were observed based on firm size or the organized/unorganized nature of firms.

Employers remarked that the challenges within recruitment are multifaceted in this industry, with 52 percent of employers identifying the limited availability of appropriately trained and technically skilled personnel as a key barrier. About 37 percent of employers cited a lack of suitable educational institutions with relevant courses for campus recruitment as a challenge. Concerns about the absence of required soft skills (mentioned by 31 percent employers), mismatched wage demands with skills (reported by 29 percent employers), and challenges related to accommodation demands from candidates (indicated by 18 percent employers) were also highlighted. For hiring female entry-level workers, the biggest challenge shared by employers was limited job seekers among girls and women as reported by 39 percent of employers, followed by a lack of education and skills and a higher proportion of female candidates declining after completion of the recruitment process, as cited by 38 percent and 37 percent of employers, respectively.

Required educational qualifications

The preferred minimum educational qualification for entry-level workers is a graduation degree, as indicated by 26 percent of employers. This trend was consistent across each sub-sector, except for food services employers, where 37 percent of employers mentioned that they mainly recruit based on workers' ability to read and write. About 23 percent of employers prefer candidates who have completed higher secondary (class XII), while another 23 percent of employers mentioned that they do not require any formal educational degree but only an ability to read and write.

Awareness about Recruit-Train-Deploy

Our enquiry with employers on their awareness of industry-funded trainings for hiring candidates through Recruit Train Deploy (RTD) revealed that only 26 percent of the employers were aware about the method. A sub-sector level analysis suggested that hotels were relatively more aware (31 percent), compared to 29 percent of employers from facilities management and 26 percent in tourism tours and travels sectors. Among the 26 percent of employers aware about RTD, 67 percent mentioned its role in training employees on specific industry skills, 47 percent saw it as a solution to bridge industry skill gaps, 45 percent viewed it as a means to recruit fresh graduates or career changers, and 39 percent believed it could overcome challenges in partnering with training service providers.

Assessing employers interest in adopting RTD, out of the 26 percent aware of RTD, 71 percent expressed interest in adopting RTD within their organizations, 23 percent were unsure, and the rest were not willing to adopt RTD for employing workers. When analyzed by the firms type, 77 percent of unorganized firm employers were interested, while 64 percent of organized firm employers expressed an inclination to adopt RTD in the future. Those employers who expressed hesitation or uncertainty about adopting RTD as a recruitment strategy cited reasons including skepticism about the approach (56 percent), a lack of resources for training collaboration (22 percent), difficulty in partnering with training service providers (11 percent), and uncertainty about the quality of trainers (11 percent).

Job roles for entry level workers

The enquiry with employers on top job roles for which they recruited entry-level workers revealed that notable entry-level positions, as mentioned by employers, include assistant chef (43 percent), commis chef (31 percent), and duty manager (29 percent) in the Hotels sub-sector, kitchen helper (45 percent), demi chef de partie (35 percent), and food and beverage service associate (35 percent) in the Food Services sub-sector, and roles such as facility staff manager (48 percent), multi-purpose associate (45 percent), and billing executive (45 percent) in the Facility Management sub-sector. In the Tourism, Tours and Travels sector, sought-after roles include assistant instructor - rope activities (58 percent), adventure travel guide (53 percent), and customer service executive (meet and greet) (52 percent). In the Cruise Liners – Cruise Ships sector, prominent entry-level positions include chef de partie (80 percent), assistant chef (60 percent), and demi chef de partie (60 percent). Across organized and unorganized sectors, there is consistency in the top entry-level job roles, with organized employers showing a preference for executive positions.

Employers inquiries regarding hard-to-fill job roles revealed that the aforementioned job roles are also challenging to recruit for when seeking entry-level workers. For instance, employers in the Food Services, Facilities Management, and Tourism – Travels and Tours sub-sectors shared that the top five demanded job roles coincided with the top hard-to-fill job roles. Employers cited reasons such as a lack of technical and soft skills in prospective workers as challenges they face during recruitment.

Wages and wage premium

To understand wage dynamics, we inquired with employers about the average monthly wage offered to entry-level workers in their organizations. The survey results revealed that the median monthly wage for entry-level workers stood at INR 13,000. Within the organized sector, the median monthly wage was slightly higher at INR 15,000, whereas in the unorganized sector, it was at INR 12,000. Sub-sector level analysis revealed that employers in the Hotels, Facilities Management, and Tourism-Tour and Travel sub-sectors offered a median monthly wage of INR

15,000. In the Cruise Liners – Cruise Ships sector, the median monthly wage was INR 14,000, and in the Food Services sub-sector, it was INR 10,000. Inquiring about wage offerings in different firm categories within sub-sectors, we found that in the Food Services sub-sector, all categories, except for restaurant chains and outdoor catering, provided a monthly median wage of INR 10,000 to entry-level workers. Restaurant chains and outdoor catering offered a slightly higher monthly median wage at INR 15,000 each. In the hotels sub-sector, luxury and star hotels offered the highest median monthly wage of INR 15,000, followed by budget hotels at INR 13,000. In the Facilities Management sub-sector, the malls category leads with the highest offering at INR 20,000. For the Tourism-Tour and Travel sub-sector, firms in the tour and travel – adventure transport category provided the highest monthly median wages (INR 15,000) to their workers.

Regarding wage premiums for entry-level workers, 83 percent of employers responded affirmatively (more within organized firms with 88 percent employers than 80 percent employers from unorganized firms). Of those who offer wage premiums, they were further inquired about the reasons for providing the premiums. We find that 67 percent of the employers offer if the workers have technical skills, 49 percent consider hands-on training experiences, and 40 percent consider those who have completed relevant short-term training courses. In terms of firm size, the majority of large-sized firms' employers (79 percent), as well as 65 percent of both medium-sized and small-sized firms' employers, reported providing wage premiums based on technical skills. Interestingly, when it comes to providing wage premiums for workers with hands-on experience, large-sized enterprises showed more inclination, with 63 percent of employers offering such premiums.

Within sub-sectors, Facilities Management (88 percent) and Hotels (86 percent) are the leading sub-sectors in providing wage premiums. Notably, Facilities Management emphasized short-term training courses, while Hotels prioritized technical experience to offer wage premiums. In addition, regarding the amount of wage premiums, employers shared that they would prefer to pay premiums within a range of 1-10 percent. Across firm sizes, among the employers expressing a willingness to offer wage premiums, 47 percent of micro-sized enterprises indicated that they offer 1-5 percent more than standard wages. For medium-sized and small-sized enterprises, approximately 44 percent of employers in each category provide a premium ranging from 6-10 percent more than normal wages.

Skills and training requirements

Examining the need for skills training, 51 percent of the overall surveyed employers affirmed it as a necessity for the skill development of their employees. Organized firms' employers (54 percent) expressed a slightly higher requirement for the skill development of their employees compared to unorganized firms (49 percent). Written and verbal communication was cited by 60 percent of employers as one of the top five relevant skills for employees, followed by problem-solving skills such as grievance redressal, customer interaction (49 percent), and literacy and numeracy skills (47 percent).

While identifying relevant skills is crucial, it is equally important to assess areas where workers exhibit the least proficiency. After investigating the top five skills considered crucial in the workplace and identifying areas where workers often lack proficiency, we observed a consistent trend. Written and verbal communication skills emerged as the most common areas of least proficiency among workers across three out of five sub-sectors, aligning with the overarching finding that employers often perceive these skills as the most deficient among their employees. Evaluation, judgment, and decision-making is also a lacking skill, accounted for by 52 percent of employers in the Facilities Management sub-sector and 40 percent of employers in the cruise liners – cruise ships sector.

Regarding training facilities for employees, we inquired about organizations providing training and the types of facilities offered. Overall, 34 percent of employers provide training facilities. Of these 34 percent, 60 percent had in-house training and others relied on sponsored training (37 percent) or provided internship opportunities (33 percent). A larger share of organized firms (54 percent) offered had training facilities than unorganized firms (21 percent). Sub-sector level analysis showed that a larger share of employers from Cruise Liners-Cruise Ships, Hotels, and Facilities Management had training facilities, reported by 100 percent, 52 percent, and 40 percent respectively.

Regarding output efficiency at work, the employers were asked at the time of recruitment about the comparison between formally trained and untrained employees. Overall, 61 percent of employers remarked that there is a difference between the two, followed by 24 percent believing that a formally trained person is slightly better by less than 10 percent. In terms of requirements and availability of facilities for providing skills training to employees, there is an observed decreasing trend as the size of a firm decreases. Specifically, 51 percent of the overall surveyed employers agreed on the necessity of skill development for their employees. Among organized firms, over 50 percent show a higher availability of training facilities, while only one-fifth of the unorganized firms have similar facilities.

Organized firms' employers (54 percent) express a higher demand for skill development compared to unorganized firms' employers (49 percent). Across sub-sectors, the highest training need is reported by 62 percent of employers in the Facilities Management sub-sector, followed by 53 percent of employers in each of the Tourism- Tour and Travel and Cruise Liners sub-sectors.

Less than half of the employers expressed the need for augmenting training, citing reasons such as cost constraints, high attrition among workers and time limits due to the fast-paced nature of work. Inquiring about past training initiatives, among the 34 percent of employers with training facilities, 21 percent had not provided any training in the past year. The primary reasons cited for not providing training include cost constraints (39 percent) and high employee attrition (34 percent). Only 43 percent of employers expressed interest in providing training to their workers in the coming 12 months. There were no significant differences across organized and unorganized sectors in willingness to provide training. However, as the size of a firm decreases, there is a decrease in the willingness to provide training to employees. Reasons shared by employers for not inclined to provide future training include cost constraints or lack of resources, time constraints due to high-paced work, and high attrition of employees, as reported by 45 percent, 43 percent, and 42 percent of employers, respectively.

Technology and India's future of tourism and hospitality sector

Regarding current adoption of technology, all employers unanimously confirmed employing technology in some capacity within their routine activities. However, the current level of technology adoption is relatively low, with 69 percent of employers indicating a low extent (0-25 percent tasks within jobs are automated). This consensus holds across sub-sectors, with a significant majority of employers in the food services and hotel sub-sectors (ranging from 58 percent to 80 percent in each sub-sector) reporting limited technology utilization. Large-sized enterprise employers demonstrate relatively more advanced technology adoption, as 35 percent employers remarked medium extent of technology adoption (i.e., 25-50 percent of business tasks automated). In contrast, micro-sized and medium-sized enterprises employers showed a low extent of technology use in current times, as indicated by 73 percent and 70 percent of employers within each enterprise type, respectively.

In terms of future expected technology adoption, 52 percent of employers perceived a medium extent, expecting 25-50 percent of tasks within jobs to be automated in the next three years. About 40 percent of employers expressed a perception of low extent of automation or technology usage in the next three years. The same analysis, at the enterprise-size level revealed that among the employers in large-sized enterprises, 45 percent of employers perceived a medium extent, 29 percent perceived a low extent, and 15 percent expected a high extent (50-75 percent automation) in the next three years. For small-sized enterprises, 49 percent employers expect a medium extent, and 46 percent expect a low extent of automation. The sub-sectors that stood out in terms of expecting to adopt technology in the next three years are Food Services (60 percent of employers) and Tourism – Tours and Travels (55 percent of employers), compared to other sub-sectors. About 12 percent of employers in Facilities Management expressed a high degree of automation expectation (50-75 percent of tasks within jobs). In the Cruise Liners – Cruise Ships sub-sector, the majority (80 percent of employers) perceived a low degree of automation expectation in the next three years.

The assessment with employers on whether there was an increase in technology adoption in their organizations especially since COVID-19 revealed that overall, 93 percent of surveyed employers confirmed this scenario. Breaking down the data between organized and unorganized firms, 94 percent of organized firms and 92 percent of unorganized firms reported an increase in technology utilization after the COVID-19 pandemic. Additionally, the firm-size level analysis suggests that 97 percent of medium-sized enterprises, and 95 percent of large sized enterprises reported an increase in technology adoption since the COVID-19 pandemic. When asked about the reasons for introducing technology in their organizations, 56 percent of organized firms cited quality enhancement in service provision as the main reason, while for unorganized firms, only 23 percent identified this as a primary reason for adopting technology. No significant differences across sub-sectors were observed.

Regarding how employers intend to use technology in the next year, overall, 96 percent employers expressed a willingness to increase their organization's respective technology usage within 12 months. Unorganized firms' employers (97 percent) displayed a slightly higher inclination compared to organized firms' employers (95 percent). At the sub-sectoral level, more than 90 percent of employers expressed a willingness to increase the use of technology in the next 12 months. The primary reasons for adopting technology in the next year varied across sub-sectors. For instance, employers of Facilities Management (67 percent) and Cruise Liners - Cruise ships (100 percent) stressed on cost reduction, while Food Services and Tourism – Tours and Travels employers emphasized focusing on enhancing service delivery through technology adoption. Among the employers who do not plan to adopt technology

in the next 12 months, 57 percent cited lack of financial capacity as the primary reason. This sentiment was consistent across sub-sectors, with employers in Hotels, Food Services, Tours and Travel, and Facilities Management expressing financial constraints and a perceived lack of necessity as the main reasons for resisting technology adoption.

In terms of awareness of specific types of technologies, all employers (100 percent) were aware of the usage of digital reservations, with complete awareness across both organized and unorganized firms. For digital marketing and social media, 80 percent of the overall employers sample expressed awareness, with higher awareness among organized firms (91 percent) compared to unorganized firms (73 percent). The awareness and utilization of all these technologies are notably lower among micro-enterprises employers compared to large, medium, and small scaled enterprises employers. For instance, regarding virtual reality and artificial intelligence, only 25 percent of employers in micro-scale enterprises are aware, compared to 31 percent of small-scale enterprises employers, 43 percent of medium-scale enterprises (43 percent) and 62 percent of large-scale enterprises employers.

The study further inquired with employers on their perception vis-à-vis technology to bring about both job displacement and creation in the next three years, with a focus on the emergence of new job roles. Specifically, larger and medium-sized enterprises expressed a stronger belief in the creation of new job roles as a significant outcome of technological advancements, with 23 percent of large-sized employers and 31 percent of medium-sized employers emphasizing this perspective. Additionally, employers reported significant awareness of technology's impact on job losses among both less-skilled (51 percent) and medium-skilled (58 percent) workers. Additionally, 52 percent of employers in both categories experienced actual job losses due to technological changes.

Towards forthcoming job roles due to advancement of technology, overall employers anticipate that key labor-intensive roles, such as assistant chefs and barista executives, will continue to be in demand, albeit with a slight possibility of displacement. Additionally, there is an expected increase in demand for positions related to digital marketing and revenue management. The specific job roles expected to be highly demanded in the future vary across sub-sectors. For instance, banquet managers (45 percent) and assistant chefs (44 percent) are highlighted by employers in the hotels sub-sector while assistant chefs (47 percent) and barista executives (41 percent) are highlighted by employers in the food services sub-sectors.

Future Manpower Requirements in Tourism and Hospitality Sector

To assess labor demand in the tourism and hospitality sector from 2024 to 2028, a sectoral employment elasticity approach, measuring the percentage change in employment with a one percentage point change in economic growth (GVA) was employed. Utilizing employment and GVA data from 2011-12 to 2022-23, sourced from the NSSO, Census of India, PLFS (2017-2022), and RBI's KLEMS database, years 2020 and 2021 were excluded due to the pandemic's impact. Using PLFS 2021-22 data, we estimated that the sector employed 10.4 million individuals in 2022, with a GVA of INR 12,171 million. Extrapolating GVA data until 2021, we projected a 5.9 percent average growth rate for GVA in tourism and hospitality from 2022 to 2028. With an estimated employment elasticity of 0.97, the tourism and hospitality sector is projected to require a workforce of 11.8 million individuals (aged 15 years and above) in 2024, at a CAGR of 16.5 percent to reach 14.8 million in 2028. The primary contributor to the total workforce demand will be accommodation and food services sub-sector, engaging around 93 percent of the workforce, i.e., 11 million individuals (aged 15 years and above) in 2024 and is further expected to increase to 13.8 million in 2028. Administrative and support services subsector closely follows, with labor demand of 0.6 million in 2024, demonstrating a percentage increase of around 33.3 percent to 0.8 million in 2028. The total incremental demand between 2024-2028 is projected to be 3 million, of which 93 percent is expected to come from accommodation and food services sub-sector alone.

The analysis of workforce requirements across skill categories reveals that 36 percent of surveyed youth identify themselves as skilled workers, 36 percent as semi-skilled, and 30 percent as unskilled. This breakdown indicates that out of the total 3 million additional workforce needed by 2028, approximately 1.1 million will be skilled, 1.1 million semi-skilled, and 0.8 million unskilled. Additionally, a state-wise analysis shows that Maharashtra, West Bengal, and Tamil Nadu have the highest share of incremental demand, while states like Uttar Pradesh, Karnataka, and Andhra Pradesh fall into the medium category. Lastly, states such as Punjab, Assam, and Telangana exhibit a lower share of incremental demand. Overall, these findings shed light on the distribution of manpower requirements across different skill levels and geographic regions.

Potential Trainable Pool in the Tourism and Hospitality Sector

In our analysis to assess the availability of manpower that is willing to join tourism and hospitality sector and can be trained, we employed a multi-step approach. Utilizing data from the 2022-23 periodic labor force survey and our own youth survey, alongside information from government sources, we determined the count of trainable youth interested in the sector. Our estimates revealed that out of India's 400 million individuals aged 15-34 years, approximately 20 million were unemployed and available for work across sectors. Out of these 20 million individuals, 5.8 million expressed readiness for employment within tourism and hospitality.

Further delving into our findings, we discovered that only 1 percent of these 5.8 million youth had received formal training in the tourism and hospitality sector, leaving a significant training gap. This gap amounts to 5.7 million young individuals lacking formal training yet possessing the potential to contribute to various segments within the industry, from hospitality and facility management to tour operations and allied services. If adequately trained, this pool of 5.7 million individuals has the potential to fulfill the additional workforce demand of 3 million by 2028.

A state-wise analysis suggests that Uttar Pradesh (16 percent), Maharashtra (10 percent), Bihar (8 percent) and West Bengal (8 percent) account for the highest share of potential trainable pool, followed by Andhra Pradesh (7 percent), Tamil Nadu (6 percent), Madhya Pradesh (6 percent), Rajasthan (6 percent), Karnataka (5 percent), and Gujarat (5 percent).

Conclusion and Policy Recommendations

The tourism and hospitality sector is growing at a rapid pace complemented by increased contributions from foreign exchange earnings and an increase in manpower requirements within the industry. However, there remains a large pool of youth who is willing to work within the tourism and hospitality industry but remains untrained. In addition, the current training landscape is plagued with numerous challenges. For instance, there is a shortage of professionally trained teaching instructors, the curriculum does not cater fully to the evolving skilling requirements in light of technological advancements, small scale employers do not have adequate in-house training provisions for their workers, and workers lack the essential soft and technical skills. Moreover, industry norms of long working hours and low wages contribute to high attrition among the workers, impacting not only workforce stability and job satisfaction but also industry's ability to meet changing consumer demands. Given the industry's bright future in creating employment opportunities for the youth, especially in light of evolving skilling landscape, an increased focus on upskilling and reskilling initiatives is crucial to ensure the workforce remains adaptable and meets industry needs.

In response to the above, we recommend that the government's focus/ prioritized response may align with the following recommendations:

- 1) Scale up the provision of skilling through industry-led trainings initiatives:** In order to address the growing manpower requirements in the sector along with a large volume of youth who can be potentially trained, the industry may actively take continuous initiatives in providing formal trainings, upskilling/reskilling programs of workers, with THSC's support. Further, THSC should utilize insights from demand studies to identify emerging or declining job roles and evolving skill requirements. State governments must be informed of these findings, empowering industry associations at state and sub-sector levels to improve worker training programs.
- 2) Address the needs of tourism and hospitality employment in India's tourism-heavy states:** Different state governments in their tourism policies emphasize different state-specific initiatives, which require building on key job roles, and skills for youth. This necessitates active collaboration and support from THSC, the Ministry of Tourism, and the Ministry of Skill Development and Entrepreneurship. Further, regarding rural homestays, state governments, such as Maharashtra, can enhance policies to support the growth of homestay businesses, providing training and resources for homestays hosts and promoting quality standards for optimum employment potential for tourism sector.
- 3) Increased focus on skilling of migrant workforce:** In view of ongoing workforce mobilization towards ageing states and employment-heavy states such as Karnataka and Tamil Nadu, it is recommended to prioritize comprehensive training and upskilling programs for migrant workers. These initiatives may focus on enhancing cultural sensitivity (such as respecting people from different states and races) promoting personality development and include modules for learning at least one regional language based on candidate preferences, which would aid in easing the integration of workers into the employment workforce of the states they migrate to. THSC can play a vital role by organizing awareness sessions for youth and implementing training modules

for trainers/teachers that would aim to cultivate an understanding of diverse cultures, races, and customs prevalent in different regions, fostering open dialogue, and promoting empathy, tolerance, and appreciation for differences.

- 4) **Investment in cross training and upskilling courses for youth:** THSC could collaborate with the Ministry of Skill Development and Entrepreneurship and the Ministry of Education to promote short-term e-learning certificate courses in premier educational institutions, lasting 3-6 months. These courses can focus on essential skills like communication, problem-solving, language proficiency, and data analysis. These courses may incorporate mandatory internships and offer apprenticeship opportunities post-completion. In promoting these e-learning programs, THSC may encourage service providers to offer curricula in multiple languages, including local languages, and English for enhanced accessibility.
- 5) **Emphasis on trainer/teacher training and professional development:** THSC may invest in quarterly training sessions for teachers and trainers to keep them updated on industry trends and curriculum delivery methods. Additionally, for smaller private educational institutions or training service providers, THSC may facilitate regular industry outreach to ensure their staff receives frequent professional development training.
- 6) **Increased focus on gig workers skilling:** Workers in gig economy, such as taxi drivers, Uber/Ola auto drivers, cleaners, and cooks, may receive skill improvement support through THSC and industry initiatives. Prioritizing specialized training for workers in various arenas, including tourist touchpoints and street food vendors can enhance their contributions to the tourism experience and promote inclusive growth in the industry. Collaborative efforts involving THSC, educational institutions, training institutions, industry players, the NSDC, and MSDE can aid in customizing training programs to meet the specific needs of these workers.
- 7) **Promoting trainings in small-sized firms and informal sector firms through industry collaborations and THSC support:** THSC may promote training for workers in small-sized firms and the informal sector, whether through in-house programs or outsourced training. To support smaller players facing cost constraints, collaborations between THSC and industry stakeholders can facilitate access to freely available online courses or affordable solutions from training providers. Encouraging participation through certificate benefits and recognition on THSC's social media platforms can serve as incentives for these firms to expand their training facilities for workers.
- 8) **Issuing joint certification of THSC and FSSAI:** Due to limited integration of Food Safety and Standards Authority of India (FSSAI) rules and regulations into the existing training curricula, it is suggested that THSC and FSSAI can collaboratively introduce joint certification programs tailored for informal workers like street food vendors and food delivery associates. This joint initiative would ensure these workers adhere to hygiene and food safety standards, elevating consumer confidence and enhancing the overall service quality within the industry.
- 9) **Utilizing industry-institutions linkages for ensuring quality placements of students:** In addition to THSC's active role in academia-industry linkages through its involvement in different aspects such as advisory boards, curricula and through career support, it is recommended that THSC directly engages with private and government educational institutes and industry partners through webinars, seminars, and workshops. Facilitating a dialogue on evolving skilling needs, emerging job roles, and industry changes is crucial, positioning THSC as a mediator to inform educational institutions and industries about necessary adjustments, ultimately improving the overall quality of placements.
- 10) **Awareness for youth on skilling and training initiatives and apprenticeships:** Given THSC has been promoting awareness for National Apprenticeship Promotion Scheme (NAPS), it is further suggested that industry stakeholders are encouraged to educate youth about its benefits and to promote apprenticeships as an important skilling model. For THSC, innovative digital measures, including interactive brochures and features like 'news tracker' linked across websites and social media platforms, to enhance awareness is recommended. Interactive workshops tailored for small-sized firms can further expand for them the required awareness of apprenticeships and internships, fostering knowledge-sharing and collaboration across various industry segments.

- 11) **Building positive sentiment for the tourism and hospitality industry:** THSC can conduct periodic awareness sessions by collaborating with key stakeholders like NSDC, MSDE, Ministry of Tourism, and various employers through initiatives such as webinars and seminars. Additionally, THSC can guide the industry in standardizing and improving workers' working hours and wage rates, offering real-time suggestions for sector-specific enhancements. This collaborative approach aims to create a mutually beneficial environment for both employers and workers, reducing workforce attrition.
- 12) **Career guidance and counselling services through THSC's facilitation:** THSC may partner with educational institutions to train teachers who can guide students on potential career paths within the tourism and hospitality industry. The expansion of career counseling services can further be strengthened by collaborating with the National Career Services under the Ministry of Labour and Employment, enabling broader outreach and scalability for comprehensive career guidance. THSC may also prioritize inclusive targeting in knowledge sessions and training programs, ensuring the active participation of diverse worker categories, including women, self-employed individuals, informal workers, gig workers, and entrepreneurs.
- 13) **Measure effectiveness of training programs and creation of a public dashboard:** It is suggested that THSC develops a public dashboard or information portal, leveraging its continuous engagement in industry dialogues, research initiatives, and the development of the tourism and hospitality sector. This dashboard may be regularly monitored and dynamically updated to serve as a valuable source of public information. Additionally, consistent efforts to update the portal with information on emerging trends, technologies, and safety innovations, particularly in newer streams of tourism such as adventure sports, are recommended.
- 14) **For cruise tourism's best potential global growth:** Aligned with India's cruise tourism national policy, THSC can play a crucial role in creating a skilled workforce adhering to international cruise tourism standards. This involves evaluating the market demand for cruise tourism workers and providing tailored training for Indian youth that caters to both domestic and global markets, in addition to offering sector-specific courses to promote the development of workers in this specialized segment.

The detailed report is structured as follows:

Chapter 1 provides insights into the study's rationale, scope and methodology.

Chapter 2 describes the tourism and hospitality's economic, employment, and skilling context. The section also focuses on government initiatives and the future of tourism and hospitality sector.

Chapter 3 highlights the survey findings drawn from youth's perspectives on evolving skilling requirements.

Chapter 4 provides industry's perspectives gathered from interviews with employers and qualitative interviews with different stakeholders.

Chapter 5 provides the estimates of future manpower requirement within tourism and hospitality industry.

Chapter 6 provides the estimates for potential training pool in the tourism and hospitality sector.

Chapter 7 concludes the study findings and provides the policy recommendations.

1. Introduction

1.1. Skill Gap Study's Rationale

The growing tourism and hospitality sector, in tandem with technological progress and the emergence of trends such as adventure tourism, wellness, and medical tourism, as well as cruise tourism, is influencing the labor market dynamics. Furthermore, the ongoing integration of technology and the sustained development of these emerging trends are anticipated to persist into the near future. It is, therefore, important to study these shifts, given the dynamic nature of the industry. With the industry demonstrating these changes, it is likely to prompt shift in skill requirements and manpower needs within the sector. However, the informal nature of the tourism and hospitality industry presents a significant challenge in building a skilled workforce. A glaring example is the fact that only 1 percent of the workforce in the sector has received formal training²⁰. This lack of formal training may lead to a workforce with limited skills and proficiency, potentially impacting service quality and the overall competitiveness of the industry. Gaining a fresh perspective on the effects of these changes and therefore conducting an updated industry analysis that provides understanding of human resources and skill requirements beyond that is crucial.

Recognizing the evolving skilling requirements, the Tourism and Hospitality Sector Skill Council (THSC) has commissioned a skill gap study to make available credible and fresh data about the actual skill gap in this industry; top job roles within the sub-sectors of tourism and hospitality; expected incremental manpower requirement in tourism and hospitality sector, ascertain the industry's willingness to pay higher salaries to the formally skilled manpower in relation to the untrained manpower, and understand the skill gap in the industry in light of the evolving sector. PricewaterhouseCoopers Services LLP (PwC) has therefore been engaged by THSC to undertake this study, covering 20 states and 6 Union Territories (UTs) across India.

1.2. Tourism and Hospitality Sector's Background

India, with its population of 1.4 billion and a 7.5 percent share in the global GDP (US\$ 101.3 trillion), emerged as the world's fifth largest-growing nation in 2023²¹. The International Monetary Fund anticipates India's GDP to escalate, projecting a rise from over US\$ 3.4 trillion in 2022 to reach US\$ 5 trillion by 2028²². Within India's rapidly expanding service sector, which is growing at a remarkable 10.3 percent per year, the tourism and hospitality industry is the second most significant contributor²³. In 2019, the tourism and hospitality sector made a substantial contribution of US\$ 191 billion, equivalent to 6.7 percent of India's total economy valued at US\$ 2,840 billion²⁴. The COVID-19 pandemic led to a severe blow to India's tourism and hospitality industry in 2020, causing a 36 percent decline in GDP contribution from US\$ 191 billion in 2019 to US\$ 122 billion²⁵. Despite this setback, the industry rebounded remarkably, with a 45 percent growth in 2021 and a substantial 21 percent growth in 2022, contributing a total of US\$ 215 billion²⁶. The sector's direct contribution to India's GDP is on a trajectory of impressive escalation, with projections indicating a rise from US\$ 215 billion in 2022 (7.5 percent of India's GDP) to a substantial US\$ 512 billion by 2029, showcasing a resilient and consistent growth path²⁷.

India has witnessed growth in the tourism sector, accompanied by a rise in foreign exchange earnings (FEE). From an average of around US\$ 17,000 million between 2011 and 2015, FEE reached a peak of US\$ 30,000 million in 2019²⁸. However, the onset of the pandemic in 2020 led to a sharp decline in FEE earnings to reach US\$ 6,958

²⁰ National Statistical Office. (2022). Periodic Labour Force Survey (July 2021-June 22). Ministry of Statistics and Programme Implementation, Government of India. Retrieved from: https://mospi.gov.in/sites/default/files/publication_reports/AnnualReportPLFS2021-22F1.pdf / Author's calculations using data from Periodic Labour Force Survey 2021-22.

²¹ The World Bank. GDP (current US\$) - India. Retrieved from <https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=IN>

²² Ministry of Finance, Government of India. (2023). Economic Survey 2022-23. Government of India, Department of Economic Affairs, Economic Division, New Delhi. Retrieved from: <https://www.indiabudget.gov.in/economicsurvey/doc/echapter.pdf>; Statista (2023). India: Share of global gross domestic product (GDP) adjusted for Purchasing Power Parity (PPP) from 2018 to 2028. Retrieved from: <https://www.statista.com/statistics/271328/indias-share-of-global-gross-domestic-product-gdp/>

²³ In India's 2022-23 Budget, it was reported that Trade, hotels, transport, communication, and broadcasting services contributed 17 percent to the country's services sector. This was the second-largest contribution after the 21 percent from Financial, real estate, and professional services, which also includes the information technology sub-sector. Retrieved from: <https://www.indiabudget.gov.in/budget2022-23/economicsurvey/doc/eschapter/echap09.pdf>

²⁴ The World Bank. GDP (current US\$) - India. Retrieved from <https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=IN>; India Brand Equity Foundation Report 2023. Tourism and Hospitality Industry in India 2023. Retrieved from https://www.ibef.org/download/1707292245_Tourism-and-Hospitality-December-2023.pdf

²⁵ India Brand Equity Foundation Report 2023. Tourism and Hospitality Industry in India 2023. Retrieved from https://www.ibef.org/download/1707292245_Tourism-and-Hospitality-December-2023.pdf

²⁶ India Brand Equity Foundation Report 2023. Tourism and Hospitality Industry in India 2023. Retrieved from https://www.ibef.org/download/1707292245_Tourism-and-Hospitality-December-2023.pdf

²⁷ India Brand Equity Foundation Report 2023. Tourism and Hospitality Industry in India 2023. Retrieved from https://www.ibef.org/download/1707292245_Tourism-and-Hospitality-December-2023.pdf

²⁸ Ministry of Tourism. (2023). Tourism Statistics at a Glance. Retrieved from: https://tourism.gov.in/sites/default/files/2023-07/India%20Tourism%20Statistics%20at%20a%20glance%202023%20-%20English%20version_0.pdf

million, marking a 78 percent decrease. Encouragingly, there was a substantial recovery in 2022, with FEE increasing by 143 percent compared to the pandemic-hit year of 2020²⁹.

With tourism and hospitality industry's profound impact on GDP, it is important to note its consequential role in employment generation. The tourism and hospitality sector employed 39 million workers in 2019-20 and is further expected to employ 53 million people by 2029³⁰.

1.3. Scope of the Study

The main objective of this skill gap study is to explore the labour market and skilling landscape and undertake a manpower requirement estimation and skill gap assessment in India's tourism and hospitality sector. This would lay the groundwork for developing an assessment and action plan to address workforce requirements for relevant and emerging job roles and address potential employment opportunities in the future. The study attempts to gather and analyze evidence to inform or respond to the following broad questions:

- i. What are the present and projected trends for the tourism and hospitality industry in India, particularly concerning its various subsectors, occupations, functions, and patterns of hiring? How is current employment distributed in tourism and hospitality's sub-sectors within India?
- ii. What are the primary job roles within each sub-sector, and which roles are considered in high demand, based on the surveys conducted?
- iii. What is the expected incremental manpower requirement in the tourism and hospitality sector? What is the volume of manpower that can be potentially trained to work in the tourism and hospitality sector?
- iv. How willing is the tourism and hospitality industry to pay higher salaries to formally skilled manpower compared to their current practice of employing and subsequently training raw manpower?
- v. What are the skilling requirements of the workforce in response to technological and other changes, and how do existing sources of skilling and training through employers align with these needs? Furthermore, what is the youth's perception of these changes in the industry?

1.4. Research Design

To undertake the skill gap study for the tourism and hospitality sectors in India, we adopted a mixed method research design using qualitative and quantitative research tools to collect relevant information from a wide range of stakeholders. Quantitative research was carried out with employers and youth to focus on the sector's outlook, skilling and training requirements, and their understanding of the impact of technological advancements in the industry across 20 states and 6 Union Territories (UTs) of India (refer to the attached annexure A for the chosen states and districts). Complementing these quantitative surveys, qualitative interviews were also conducted with a diverse array of stakeholders, including government officials, industry associations, educational institutions and training service providers. Additionally, we engaged in discussions with senior representatives of Tourism and Hospitality Skill Council's Board and Sub-Committee (refer to the attached annexure B). Moreover, in order to understand the human capital needs within the industry, we projected the workforce requirements and the incremental manpower demand, and also estimated the volume of potentially trainable youth.

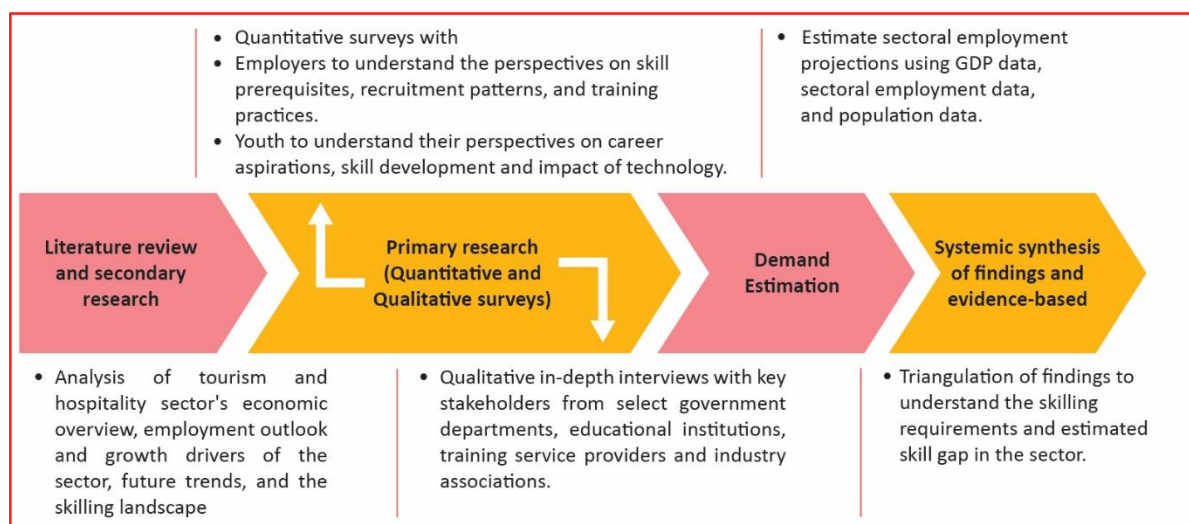
To achieve the outlined scope of the study, we relied on the following approach:

²⁹Ministry of Tourism. (2023). Tourism Statistics at a Glance. Retrieved from: https://tourism.gov.in/sites/default/files/2023-07/India%20Tourism%20Statistics%20at%20a%20glance%202023%20-%20English%20version_0.pdf

³⁰ India Brand Equity Foundation Report 2023. Tourism and Hospitality Industry in India 2023. Retrieved from https://www.ibef.org/download/1707292245_Tourism-and-Hospitality-December-2023.pdf.

FIGURE 1: OVERALL APPROACH OF THE STUDY

- **Literature review and secondary data analysis:** A comprehensive analysis of the economic and labor



market dynamics within the tourism and hospitality sector was crucial for a nuanced understanding of the industry. Our secondary research was dedicated to comprehending overall economic trends, sector-specific indicators (such as GDP contribution, growth patterns, COVID-19 impact, employment scenario, and the skilling ecosystem), and the future trajectory of tourism and hospitality, including evolving consumer patterns and technological advancements. To conduct this research, our team thoroughly examined peer-reviewed publications and other secondary sources such as the Periodic Labour Force Survey (PLFS) 2017-2022, the Ministry of Statistics and Program Implementation, Census 2011, Reserve Bank of India, the World Travel and Tourism Council, India Brand Equity Foundation, Ministry of Tourism, the World Bank, International Labour Organization, United Nations, World Economic Forum, amongst others.

- **Primary research:** After completing our secondary research, we conducted thorough primary research, engaging in both qualitative and quantitative surveys with various stakeholders. This approach aimed to grasp stakeholders' perspectives on the evolving skill requirements within the tourism and hospitality industry. The primary research was conducted in 121 districts across 20 states and 6 UTs in India. The selection criteria for shortlisting 20 states and 6 UTs was based on: a) the number of annual tourist footfall from domestic visits, utilizing data from India Tourism Statistics (2019), and b) the number of individuals employed in the accommodation sector for each state, utilizing data from the PLFS 2018-19. These determinants were chosen as they represent crucial aspects of the tourism and hospitality sector.

For the selection of 20 states and 6 UTs, we validated the selection variables by calculating the Pearson's Correlation Coefficient between the number of domestic tourist visits and the workforce engaged in the accommodation sector in each state. The strong positive correlation ($P = +87$ percent) justified the choice of these variables as key determinants of the tourism landscape. Subsequently, we selected 20 states and 6 Union territories based on their rankings in terms of these variables. The states were further ranked based on two parameters: tourism landscape and geographical coverage. The final ranking was calculated by averaging these two ranks, resulting in a list from the most touristy to the least touristy states. Uttar Pradesh, Tamil Nadu, and Madhya Pradesh emerged as the top three states in this ranking. The detailed selection criteria of 20 states and 6 UTs is represented in the Annexure A. After choosing appropriate geographical areas for our surveys, we selected employers and youth participants for the quantitative surveys. The following details provide insight into the criteria and process used for this selection.

After selection of the 20 states and 6 UTs, we conducted quantitative surveys with employers and youth from these geographies.

Quantitative Surveys

- i) **Employers' survey to understand workforce and skill requirements:** We developed a quantitative survey that was administered to 553 employers across the selected THSC specified subsectors. The sub-sectors were identified as: a) hotels (289); b) facility management (42); c) food services (155); d) tourism – tour and travel (62), and e) cruise liners (5)³¹.

In the process of data collection, PwC utilized a dual approach involving a pre-identified list provided by THSC and proactive outreach by the organization through which the sampling frame of the employers was developed. The pool of 553 employers comprised not only the above-mentioned employers, but senior representatives from nine prominent chain hotels and travel agencies, all of whom are members of the THSC's board and sub-committee. To ensure adequate representativeness in selection of employers across pre-identified 121 districts in 20 states and 6 UTs, we covered roughly 5 employers per district to have a total of 553 employers.

We understand that the tourism and hospitality sector predominantly features informal sector employers³², therefore, we made a deliberate effort to encompass both the organized and unorganized sectors within this survey, aiming to capture perspectives from diverse employers. The organized sector comprising 41 percent of the sample included establishments like luxury hotels and restaurant chains, while the unorganized sector forming 59 percent of the sample encompassed entities such as guesthouses, dhabas and tour operators among others (details are attached in Annexures D). This inclusive approach ensured a comprehensive understanding of the challenges and opportunities present in both segments of the tourism and hospitality industry.

We also ensured the inclusion of employers of various sizes and scale within the industry based on the last year's turnover of the organization. This included large employers (with a turnover not exceeding 250 crore), constituting 12 percent of the sample; medium-sized employers (with a turnover between 50 crore and 250 crore rupees), forming 21 percent of the sample; small employers (with a turnover not exceeding 50 crore rupees), making up 23 percent of the sample; and micro-enterprises (with a turnover not exceeding 5 crore rupees), accounting for 44 percent of the sample.

The employer survey gathered comprehensive information on workforce needs within organizations, recruitment strategies for entry-level positions, perspectives on evolving skill requirements, training dynamics within their establishments, and the influence of technological advancements in the tourism and hospitality sector.

- ii) **Youth's survey to understand their career aspirations and skilling requirements:** We further developed a quantitative survey that was administered to a total of 10,158 youth across identified 121 districts in 20 states and 6 UTs. The youth in the tourism and hospitality industry were covered in four categories: a) youth who are currently studying or in education³³ (2708); b) youth who are currently waged or salaried employed (2458); c) youth who are currently self-employed or entrepreneurs (2486), and d) youth who are neither in education, training or in employment (2506).

To achieve the desired sample size, we surveyed 85 youth respondents from each district to achieve a sample size of 10,158. Within 10,158 youth, we ensured balanced representation across the above four categories. The youth survey also aimed to maintain a gender balance, with males accounting for 56 percent of the sample and females accounting for the remaining 44 percent.

The youth survey focused on how the aspirations of youth was changing, what type of job roles they seek, what type of skills they consider necessary, what kind of skill training they are aware of and are willing to undergo in the tourism and hospitality sector, their awareness about technological changes, and their migration preferences.

³¹ The respective number of employers surveyed within each sub-sector are mentioned in parentheses.

³² International Monetary Fund. Session II: Traditional Estimation Practices: Determining the Level and Growth of the Informal Economy

³³ The youth pursuing education was chosen from sectors closely associated with tourism and hospitality. These included Electricity and Water Utility, Wholesale and Retail, Financial Services, IT and Communication (ICT), Education, Real Estate, Administrative Services, and Food and Beverage

Qualitative Surveys

To complement our quantitative findings, we conducted qualitative in-depth interviews concurrently with the quantitative surveys. These interviews involved key stakeholders identified within the tourism and hospitality sector. We attempted reaching out to 453 stakeholders through email, phone, or both. Of these, 72 stakeholders from 17 states and 2 UTs (refer to the attached list in Annexure B) expressed interest in participating for in-depth interviews. The interested stakeholders included 29 educational institutions associated with THSC, 26 training service providers associated with THSC, 10 industry associations, and 6 relevant ministries and government departments (list attached in annexure B).

The discussion with the key stakeholders revolved around - 1) key changes and challenges within the tourism and hospitality sector in terms of labour demand and skilling gaps; 2) assess the industry's perception about employability of students' graduating from various educational institutions; 3) understanding about industry's willingness to participate in skill training initiatives; 4) stakeholders' understanding of existing schemes, policies and programmatic interventions and their impact(s); 5) impact of emerging trends and other factors influencing workforce requirements and how government is responding (or preparing to respond) to the same; 6) gauge preference about migrant workforce; and 7) initiatives on upskilling and reskilling to enable a future-ready workforce.

- **Estimation approach to evaluate the workforce requirement and potential trainable pool in tourism and hospitality:** To gauge future labor demand in the tourism and hospitality sector, we employed the sectoral employment elasticity approach, measuring the percentage change in employment associated with a one percent change in economic growth. Data from sources such as the Population Projection Report 2011-2036 by the Census of India, unit-level data from various rounds of the Periodic Labour Force Survey (2017-2022), and the latest RBI KLEMS data (2019) were utilized for elasticity estimation. We also calculated sub-sector employment using census data and PLFS data to forecast workforce demand in tourism and hospitality sector for the years 2024-2028 for those aged 15 years and above. We also used PLFS data to estimate the volume of youth that can be potentially trained to work in tourism and hospitality sector.
- **Systematic synthesis of findings and evidence-based suggestions:** The understanding obtained from primary sources was used to substantiate, correlate, and validate the inferences derived out of secondary research to establish the evidence for generating recommendations towards policy direction in the industry.

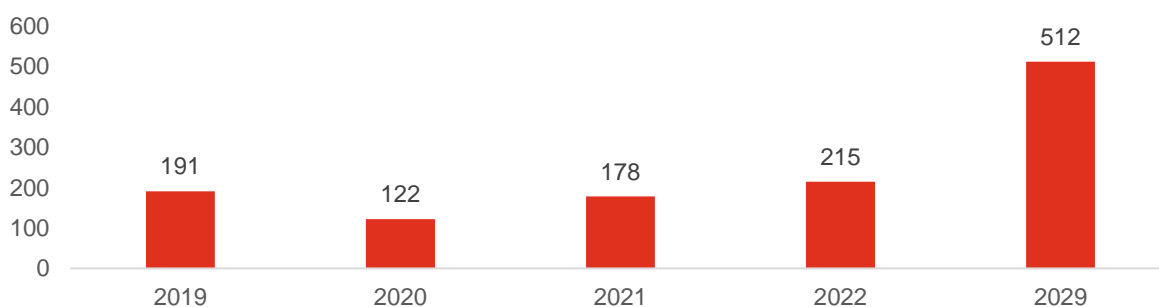
2. Tourism and Hospitality Sector Overview

2.1. Economic Overview

In 2023, India, with a population of 1.4 billion people and a 7.5 percent share of the global Gross Domestic Product (GDP) (US\$ 101.3 Trillion), stood as the world's most populous country and the fifth-fastest-growing nation globally³⁴. The International Monetary Fund anticipates India's GDP to escalate, projecting a rise from over US\$ 3.4 trillion in 2022 to reach US\$5 trillion by 2028³⁵. This surge positions India to become the world's third largest (in nominal terms) economy, surpassing both Japan and Germany by 2028³⁶. In terms of sectoral growth, increasing capital expenditure is driving the manufacturing sector growth at 4.7 percent Y-o-Y, but the services sector, growing at 8 percent Y-o-Y, has been the biggest source of India's growth³⁷. The service sector alone contributes 66 percent to India's GDP and creates roughly 28 percent of all jobs³⁸.

Within the services sector, the tourism and hospitality industry ranks as the second-most substantial contributor, following the financial services, real estate, and professional services sector³⁹. In 2019, the tourism and hospitality sector contributed US\$ 191 billion (equivalent to 6.7 percent) to India's economy of US\$ 2840 billion⁴⁰. However, the beginning of the COVID-19 pandemic in 2020 brought about a severe downturn, resulting in a 36 percent decline in GDP contribution (from US\$191 billion in 2019 to US\$122 billion in 2020). Despite the setback, the industry bounced back remarkably. In 2021, the industry witnessed a YoY growth in GDP of about 45 percent, followed by a 21 percent YoY growth in 2022, contributing to a total of US\$ 215 billion in 2022⁴¹. The direct contribution of the sector to India's GDP has mirrored this trajectory. The Indian tourism and hospitality industry further anticipates an impressive escalation, rising from US\$ 215 billion in 2022 to a substantial US\$ 512 billion by 2029, demonstrating a robust and consistent growth trajectory⁴².

FIGURE 2: CONTRIBUTION OF TOURISM AND HOSPITALITY INDUSTRY TO INDIA'S GDP, BY VALUE (US\$ BILLION)



Source: India Brand Equity Foundation Report 2023

³⁴ Ministry of Finance, Government of India. (2023). Economic Survey 2022-23. Government of India, Department of Economic Affairs, Economic Division, New Delhi. Retrieved from: <https://www.indiabudget.gov.in/economicsurvey/doc/echapter.pdf>; The World Bank. (2023). The World Bank in India. Retrieved from <https://www.worldbank.org/en/country/india/overview>; Statista (2023). India: Share of global gross domestic product (GDP) adjusted for Purchasing Power Parity (PPP) from 2018 to 2028. Retrieved from: <https://www.statista.com/statistics/271328/indias-share-of-global-gross-domestic-product-gdp/>

³⁵ Ministry of Finance, Government of India. (2023). Economic Survey 2022-23. Government of India, Department of Economic Affairs, Economic Division, New Delhi. Retrieved from: <https://www.indiabudget.gov.in/economicsurvey/doc/echapter.pdf>; The World Bank. (2023). The World Bank in India. Retrieved from <https://www.worldbank.org/en/country/india/overview>; Statista (2023). India: Share of global gross domestic product (GDP) adjusted for Purchasing Power Parity (PPP) from 2018 to 2028. Retrieved from: <https://www.statista.com/statistics/271328/indias-share-of-global-gross-domestic-product-gdp/>

³⁶ International Monetary Fund. (2024). GDP, Current Prices. Retrieved from: <https://www.imf.org/external/datamapper/NGDPD@WEO/OEMDC/ADVEC/WEOORLD/IND>

³⁷ Department of Economic Affairs, Government of India. (2023). Half Yearly Economic Review 2023-24. Retrieved from: https://dea.gov.in/sites/default/files/Half-Yearly%20Economic%20Review%20FY24_November%202023_0.pdf

³⁸ IBEF. (2023). Services sector in India. Retrieved from <https://www.ibef.org/industry/services>

³⁹ In India's 2022-23 Budget, it was reported that Trade, hotels, transport, communication, and broadcasting services contributed 17 percent to the country's services sector. This was the second-largest contribution after the 21 percent from Financial, real estate, and professional services, which also includes the information technology sub-sector. Retrieved from: <https://www.indiabudget.gov.in/budget2022-23/economicsurvey/doc/eschapter/echap09.pdf>

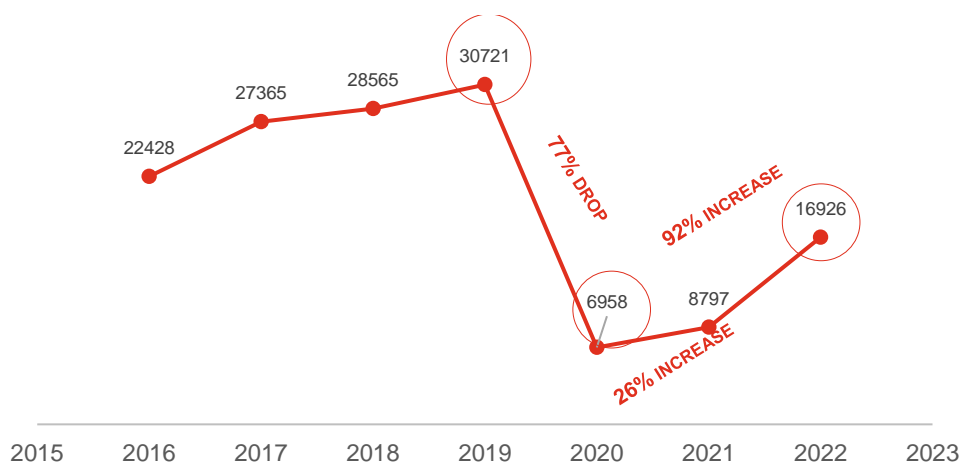
⁴⁰ India Brand Equity Foundation Report 2023. Tourism and Hospitality Industry in India 2023. Retrieved from https://www.ibef.org/download/1707292245_Tourism-and-Hospitality-December-2023.pdf; World Bank. (2022). GDP (current US\$) – India. Retrieved from <https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=IN>

⁴¹ India Brand Equity Foundation Report 2023. Tourism and Hospitality Industry in India 2023. Retrieved from https://www.ibef.org/download/1707292245_Tourism-and-Hospitality-December-2023.pdf

⁴² India Brand Equity Foundation Report 2023. Tourism and Hospitality Industry in India 2023. Retrieved from https://www.ibef.org/download/1707292245_Tourism-and-Hospitality-December-2023.pdf

The sectoral growth in the tourism sector has been supplemented by a growth in Foreign Exchange Earnings (FEE) in India. The foreign exchange earnings from the sector averaged around US\$ 17,000 million between 2011 and 2015, and reaching up to US\$ 30,000 million in 2019⁴³, right before the pandemic. In 2020, the FEE, plummeted to US\$ 6958 million, which was a decline of 78 percent from the previous year. However, the FEE

FIGURE 3: FOREIGN EXCHANGE EARNINGS (FEE) FROM TOURISM IN INDIA (US\$ IN MILLIONS) (2016-2022)



showed an increment of 143 percent in 2022 as compared to the pandemic year of 2020⁴⁴. The growth in the tourism and hospitality sector is driven by its five essential sub-sectors: hotels, tourism and travel, food services, facility management, and cruise liners.

Growth across Tourism and Hospitality Industry's Sub-Sectors

Travel and Tourism

The travel and tourism sub-sector significantly contributed to the nation's GDP in 2021. As per the World Travel and Tourism Council's (WTTC) Economic Impact Report of 2022, India's travel and tourism sub-sector's contribution to GDP (5.8 percent) in 2021 was the sixth highest in the world after the United States of America, China, Germany, Japan, and Italy⁴⁵. In 2021, India secured the 54th position as per the Travel and Tourism Development Index by the World Economic Forum, which evaluates 117 countries based on factors crucial for fostering sustainable and resilient growth in travel and tourism economies. India is still the top scorer in Southern Asia even after facing a downfall from rank 46 in 2019⁴⁶.

To understand the health and competitiveness of India's tourism sub-sector, we looked into how foreign tourist arrivals (FTAs) have changed over time. In 2019, before the COVID-19 pandemic hit, India hosted 10.9 million foreign tourists. In 2020, the impact of COVID-19 was evident, resulting in only 2.7 million Foreign Tourist Arrivals (FTAs). The numbers further declined to 1.52 million in 2021. However, there was a noteworthy rebound in 2023, with FTAs reaching 6.1 million. The projections suggest a continuous growth in international tourist arrivals, expected to rise from 30.5 million by 2028, showcasing an upward trajectory⁴⁷. In 2022, the leading contributors to FTAs were the United States (28 percent), Bangladesh (16 percent), the United Kingdom (11 percent), Canada (5 percent), Nepal (3 percent), Afghanistan (2 percent), Australia (2 percent), Germany (2 percent), Portugal (2 percent), and France (2 percent). Combining together, these countries consists of 74 percent of the total FTAs⁴⁸.

The number of domestic tourist visits are projected to increase significantly, from 1.7 billion in 2022 to 15 billion in 2047, indicating a notable surge in domestic travel across the nation⁴⁹. Looking at state-wise tourist arrivals in 2022, Gujarat led with the largest share of domestic tourists at 21 percent, followed by Maharashtra (18 percent), West Bengal (12 percent), Delhi (10 percent), and Uttar Pradesh (8 percent). On the other hand, domestic tourists favored

⁴³ Ministry of Tourism, Government of India. (2023). Tourism Statistics at a Glance. Retrieved from: https://tourism.gov.in/sites/default/files/2023-07/India%20Tourism%20Statistics%20at%20a%20glance%202023%20-%20English%20version_0.pdf

⁴⁴ Ministry of Tourism, Government of India. (2023). Tourism Statistics at a Glance. Retrieved from: https://tourism.gov.in/sites/default/files/2023-07/India%20Tourism%20Statistics%20at%20a%20glance%202023%20-%20English%20version_0.pdf

⁴⁵ World Travel and Tourism Council. (2022). Travel and Tourism Economic Impact 2021. Global Economic Impact and Trends 2021. Retrieved from: <https://wtcc.org/Portals/0/Documents/Reports/2021/Global%20Economic%20Impact%20and%20Trends%202021.pdf>

⁴⁶ World Economic Forum. (2023). Travel and Tourism Development Index 2021 Rebuilding for a Sustainable and Resilient Future. Retrieved from: https://www3.weforum.org/docs/WEF_Travel_Tourism_Development_2021.pdf

⁴⁷ India Brand equity Foundation. Tourism and Hospitality Industry 2023. Retrieved from: <https://www.ibef.org/states/indian-tourism-and-hospitality-industry-analysis-presentation>

⁴⁸ Ministry of Tourism, Government of India. (2023). Tourism Statistics at a Glance. Retrieved from: https://tourism.gov.in/sites/default/files/2023-07/India%20Tourism%20Statistics%20at%20a%20glance%202023%20-%20English%20version_0.pdf

⁴⁹ Ministry of Tourism, Government of India. (2023). Tourism Statistics at a Glance. Retrieved from: https://tourism.gov.in/sites/default/files/2023-07/India%20Tourism%20Statistics%20at%20a%20glance%202023%20-%20English%20version_0.pdf

states like Uttar Pradesh (18 percent), Tamil Nadu (13 percent), Andhra Pradesh (11 percent), Karnataka (11 percent), and Gujarat (8 percent) as their preferred destinations in the same year. Attracting both domestic and international travelers alike Uttar Pradesh, Tamil Nadu, Gujarat, Maharashtra, and Rajasthan emerged as key tourism hotspots in India for 2022.⁵⁰

FIGURE 5: TOP 10 STATES WITH HIGHEST SHARE (IN PERCENTAGE) OF DOMESTIC TOURIST VISITS IN 2022

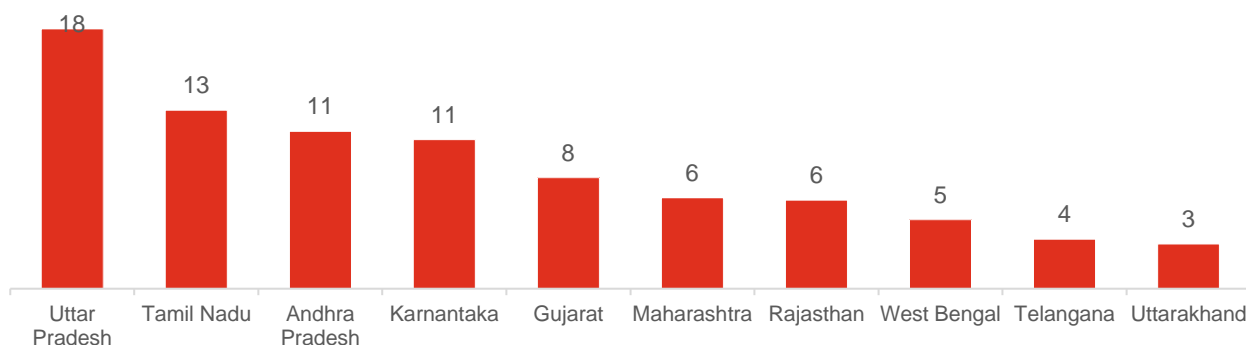
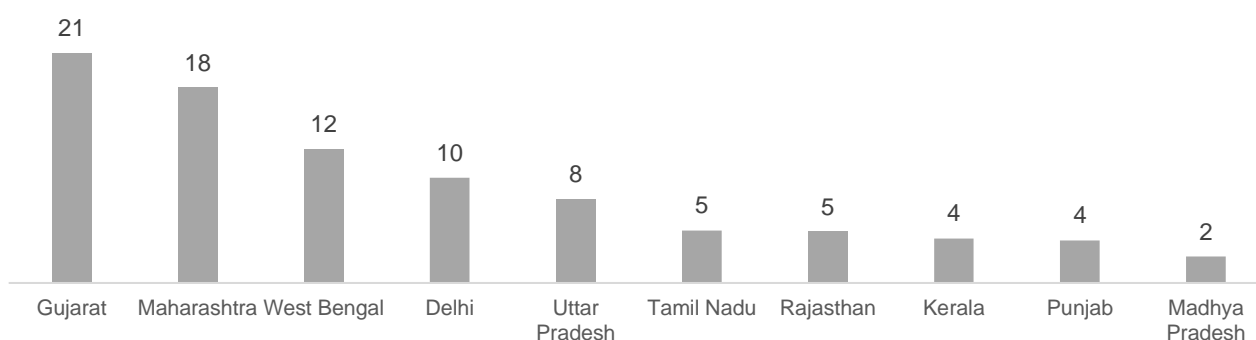


FIGURE 4: TOP 10 STATES WITH HIGHEST SHARE (IN PERCENTAGE) OF INTERNATIONAL TOURIST VISITS IN 2022



Source: Tourism Statistics India, 2023
As per the mentioned source, the latest data was available until 2022

In terms of purpose of visits, medical visits were the key reason (21 percent), followed by visits for business or professional meetings (12 percent), leisure (6 percent), and miscellaneous reasons. India's tourism landscape has shown notable achievements. The country recorded 6 million foreign tourist visits and 1.7 billion domestic tourist visits, contributing US\$ 17 billion towards the foreign exchange earnings. According to the Tourism Statistics Report 2023, India secured the 14th position globally in tourism receipts (i.e. expenditures made by visitors while traveling in a country), resulting in 2 percent share in international tourism receipts. These figures emphasize India's growing prominence and attractiveness in the global tourism arena.

TABLE 1: TOURISM SECTOR INDICATORS FOR INDIA

Indicators	Value
Foreign Tourist Arrivals in India (in numbers)	6 million
Domestic Tourist Visits to all States/UTs (in numbers)	1.7 billion
Estimated Foreign Exchange Earnings from Tourism 2022 (in US\$)	US\$ 17 billion
Share (in percent) of India in International Tourism Receipts	2 percent
India's rank in World Tourism Receipts (India's rank in world tourism receipts refers to its standing in terms of the total revenue generated from international tourism. World tourism receipts represent the total amount of money spent by international tourists in a particular country)	14 th

Source: Tourism Statistics 2023, India

⁵⁰ Ministry of Tourism. (2023). Tourism Statistics at a Glance. Retrieved from https://tourism.gov.in/sites/default/files/2023-07/India%20Tourism%20Statistics%20at%20a%20glance%202023%20-%20English%20version_0.pdf.

Hotels

Hotel industry is another important sub sector under Tourism and Hospitality sector. Due to the adverse effects of the COVID-19 pandemic, India's hotel industry experienced a significant setback, contracting by 47 percent in the April-June 2020 period. In the mid-2020, hotel occupancy declined by 77 compared to 2019. Despite these challenges, the Indian hospitality sector showed resilience, fueled in part by an increase in the number of hotel projects. In 2023, the sub sector showed an improved occupancy rate of 59-61 percent, up by 15-17 percentage points from 2022.⁵¹ Additionally, average rates fully recovered, increasing by 37-39 percent. This resulted in an 89-91 percent growth in Revenue per Available Room (RevPAR) during 2023⁵².

In response to the demand recovery, hotel companies accelerated their growth plans, experiencing a 33 percent rise in the opening of new hotel chains. The industry's expansion efforts also focused on leisure destinations and Tier 3 and Tier 4 cities, acknowledging their untapped potential. Additionally, with over 200 G20 meetings held across 55 destinations in India during its G20 presidency until November 2023, the hotel sector stood to benefit significantly from the incremental demand in these cities.

Food Services

The food services sub-sector is estimated at approximately US\$ 77.5 billion in 2024, with forecasts indicating a substantial increase to about US\$ 125.1 billion by 2029. This growth trajectory suggests a notable Compound Annual Growth Rate (CAGR) of around 10 percent expected during the forecast period spanning from 2024 to 2029⁵³. Between 2017 and 2022, the quick service restaurant sector saw a slight 0.2 percent increase. This growth was chiefly influenced by a rising young population. Notably, cloud kitchen outlets demonstrated the fastest expansion, and are expected to sustain a 6.1 percent CAGR. Cafes and bars dominated the market, holding 48 percent share in 2022, while the surge in online meal delivery fueled the growth of cloud kitchens. The pandemic accelerated the popularity of online meal services, with platforms like Swiggy, Zomato and Uber Eats significantly contributing to the industry's growth.

Facility Management

The estimated size of India's facility management (FM) market is US\$ 148.6 Billion in 2024. It is further projected to grow and reach US\$ 212.1 Billion by 2029. This growth is anticipated to proceed at a CAGR of approximately 7.4 percent during the forecast period spanning from 2024 to 2029⁵⁴. The present facility management market in India is dispersed. ISS Facility Management BVG India Limited, G4S India, Sodexo Facilities Management Services India Private Limited, and Mortice Group PLC (Tenon FM) are some of the prominent businesses in the Indian facility management sector. Soft services within facility management encompass various categories, including cleaning, recycling, security, pest control, handyman services, grounds maintenance, and waste management. The demand for soft FM services is anticipated to experience a continuous growth, influenced by regional factors like the development of new branch offices and the outsourcing of soft FM. With the rising demand, the FM businesses prioritize personalized services offering added value, such as reliable and efficient risk management in compliance with local labor laws and health, safety, and environment (HSE) regulations⁵⁵.

Cruise Liners

A niche sector within tourism and hospitality is cruise tourism, representing approximately 1 percent of the global travel industry in 2021, has demonstrated consistent growth, particularly in contemporary and premium cruises⁵⁶. India, recognizing the economic impact and potential for job creation, has intensified its focus on the cruise sector. Through strategic initiatives such as the construction of new terminals, regulatory enhancements, marketing engagements, and relaxation of cabotage rules, India has witnessed a rapid 35 percent plus growth in its cruise market over the last three years in 2021⁵⁷. Globally, the cruise industry has witnessed a steady 6 percent CAGR growth, with new and premium cruises dominating the current market. The Indian cruise market, while modest, is

⁵¹Modor intelligence. (n.d.). Hospitality Industry in India Size and Share Analysis - Growth Trends and Forecasts (2024 - 2029). Retrieved from <https://www.mordorintelligence.com/industry-reports/hospitality-industry-in-india>

⁵² Modor intelligence. (n.d.). Hospitality Industry in India Size and Share Analysis - Growth Trends and Forecasts (2024 - 2029). Retrieved from <https://www.mordorintelligence.com/industry-reports/hospitality-industry-in-india>

⁵³ Modor intelligence. (n.d.). India foodservice market size and share analysis - Growth trends and forecasts up to 2029. Retrieved from <https://www.mordorintelligence.com/industry-reports/india-foodservice-market>

⁵⁴ Modor intelligence. (n.d.). Facility Management Industry in India Size and Share Analysis - Growth Trends and Forecasts (2024 - 2029). Retrieved from <https://www.mordorintelligence.com/industry-reports/india-facility-management-market>.

⁵⁵ Modor intelligence. (n.d.). Facility Management Industry in India Size and Share Analysis - Growth Trends and Forecasts (2024 - 2029). Retrieved from <https://www.mordorintelligence.com/industry-reports/india-facility-management-market>.

⁵⁶ Ministry of Ports, Shipping and Waterways, Government of India. (n.d.). Maritime Amrit Kaal Vision 2047 (MAKV 2047). Retrieved from: https://shipmin.gov.in/sites/default/files/Maritime%20Amrit%20Kaal%20Vision%202047%20%28MAKV%202047%29_compressed_0.pdf.

⁵⁷ Ministry of Ports, Shipping and Waterways, Government of India. (n.d.). Maritime Amrit Kaal Vision 2047 (MAKV 2047). Retrieved from: https://shipmin.gov.in/sites/default/files/Maritime%20Amrit%20Kaal%20Vision%202047%20%28MAKV%202047%29_compressed_0.pdf.

driven by increasing disposable incomes and government support such as favorable policies and expansion of e-visa facilities to seaports. Moreover, with infrastructure improvements, relaxed immigration policies, and an array of travel routes that appeal to domestic tourists, the demand for cruises in India is anticipated to increase. Initiatives to broaden cruise facilities beyond the current six major ports and discover new locations show a strategic effort to capitalize on the considerable growth potential of the cruise industry in India.

With tourism and hospitality industry's profound impact on GDP, it is important to note its consequential role in employment generation. The tourism and hospitality sector employed 39 million workers in 2019-20, which is further expected to employ 53 million people by 2029⁵⁸. Forecasts suggesting an increase in employment in the tourism and hospitality sector, along with its significant contribution to India's GDP, highlight the importance of enhanced investments and strategic government actions in driving employment growth, as elaborated in the subsequent section.

During the economic slowdown induced by the COVID-19 pandemic, Air India made the decision to withdraw job offers for approximately 180 trainee cabin crew members. In a similar vein, Indigo Airlines implemented workforce reductions by cutting 10 percent of its staff. The aviation industry and its associated sectors bore a substantial brunt, with 30 lakh jobs affected, resulting in a significant economic impact amounting to US\$ 11,610 billion in revenues. Furthermore, the commercial, hotel, transportation, and telecommunications sectors experienced a noteworthy downturn. These instances highlight the far-reaching consequences across diverse sectors as they grappled with the economic repercussions of the global health crisis.

Source: Travel and Tourism Economic Impact Report 2022 by World Travel and Tourism Council

2.2. Growth Drivers of Tourism and Hospitality Industry

Increased Investments

The growth of the tourism and hospitality sector is influenced by various key factors that drive its expansion and success. India's tourism industry has undergone substantial growth owing to a remarkable surge in Foreign Direct Investment (FDI) over the last two decades. The attractiveness of the tourism and hospitality sectors lies in the government's allowance for up to 100 percent FDI, which has led to significant investments. Between 2014 and 2022, India attracted FDI inflows exceeding US\$ 9 billion in the hotel and tourism sub-sectors. This notably surpassed the FDI received from 2000 to 2014, which amounted to over US\$ 7 billion⁵⁹. Revenue from the hotel and hospitality sector is expected to reach US\$ 7.6 billion in 2023, growing at a compound annual growth rate of 8.3 percent from 2023 to 2027⁶⁰.

Investments in the tourism and hospitality sector are a reciprocated effect of the increased need for infrastructural development which is a crucial aspect of the tourism industry, encompassing accommodation facilities like hotels and resorts. To promote tourism, the Government of India initiated programs such as the Swadesh Darshan Scheme, concentrating on developing thematic tourist circuits. The Ministry of Tourism had undertaken 76 projects with a budget of 4,734 crore released until 2022 to boost the tourism infrastructure⁶¹. More than half of the Ministry of Tourism's budget was also allocated to subsidizing the development of megaprojects, circuits, and infrastructure projects related to rural tourism. This helped the Indian startup ecosystem, since there are more than 1,300 Department for Promotion of Industry and Internal Trade recognized startups in the tourist industry.⁶² Tourism infrastructure development is complemented by state governments, which play a significant role in building infrastructure. India boasts over 3,650 Archaeological Survey of India sites, including 40 UNESCO-Designated World Heritage Sites. Beyond enhancing tourists' experiences, the logistics and tourism infrastructure facilities also contribute to sectoral growth.

Government Policies and Initiatives

The Ministry of Tourism and State Tourism Boards actively promote tourism across India through various strategies. The 'Incredible India Campaign', launched in 2002, aimed to promote the country's diverse culture, focusing on both popular and lesser-known destinations. Additionally, the Ministry of Tourism launched the 'Dekho Apna Desh' campaign in January 2020, promoted the campaign through social media, websites, and tourism offices, and

⁵⁸India Brand Equity Foundation Report 2023. Tourism and Hospitality Industry in India 2023. Retrieved from https://www.ibef.org/download/1707292245_Tourism-and-Hospitality-December-2023.pdf

⁵⁹ Invest India. (2023). FDI and Tourism: A Sustainable Alliance. Retrieved from <https://www.investindia.gov.in/team-india-blogs/fdi-and-tourism-sustainable-alliance>.

⁶⁰ <https://www.hindustantimes.com/opinion/unlocking-india-s-tourism-potential-101695807493515.html>

⁶¹ Ministry of Tourism. (2023). Development of Tourist Destinations in the Country. Retrieved from <https://pib.gov.in/PressReleaseDetail.aspx?PRID=1986384>.

⁶² <https://www.hindustantimes.com/opinion/unlocking-india-s-tourism-potential-101695807493515.html>

organized webinars and quizzes motivating people to explore various facets of India. The Ministry also conducted webinars under the theme of 'Dekho Apna Desh' which started from April 14, 2020. Further, the government plans to develop significant destinations at 78 lighthouses along India's coastline.

The government has also recently launched the 'Vibrant Village Programme' for the financial year 2023-26. This centrally sponsored scheme will provide funds for the development of infrastructure and creation of livelihood opportunities in 2967 villages in 46 blocks of 19 districts, including those in Arunachal Pradesh, Sikkim, Uttarakhand, and Himachal Pradesh, and the UT of Ladakh. It will encourage them to stay there, reversing the outmigration from these villages and enhancing border security.

In the recent times, the government has formulated diverse strategies to enhance different facets of tourism in India. These strategies cover a variety of areas, each with its own goals:

- **National Strategy on Sustainable Tourism (April 2022):** This strategy focuses on making India's tourism industry more sustainable, promoting resource-efficient, resilient, inclusive, and carbon-neutral⁶³.
- **National Strategy on Eco Tourism (April 2022):** This strategy aims to make India a top destination for eco-tourism by utilizing its natural resources effectively⁶⁴.
- **National Strategy and Roadmap for Medical and Wellness Tourism:** This strategy aims to strengthen the infrastructure for medical and wellness tourism, creating a distinctive brand and maintaining high quality standards⁶⁵.
- **National Strategy for Adventure Tourism (April 2022):** This strategy focuses on developing adventure destinations, with an emphasis on safety, skill development, capacity building, and effective marketing to promote adventure tourism⁶⁶.
- **National Strategy and Roadmap for Rural Tourism (Dec 2021):** This strategy prioritizes rural tourism at the national level, aiming to address issues such as poverty alleviation, women's empowerment, and improving the economic well-being of rural communities⁶⁷.

To promote inbound tourism, it is important to have an easy and accommodating visa system. The Ministry of Tourism collaborated with the Ministry of Home Affairs and the Ministry of External Affairs to simplify the process obtaining of visa permits. As of December 2023, India offered e-visas to nationals from 165 countries across five categories: e-Tourist visa, e-Business visa, e-Medical visa, e-Medical Attendant Visa, and e-Conference Visa. Togo is the latest addition to this list. The e-visa allows entry through 29 airports and 5 seaports, making travel smoother for eligible visitors⁶⁸. Cruise tourists with e-visas are exempt from biometric checking. Under e-Medical Visa and e-Medical Attendant Visa, triple entry is permitted, with extensions of up to 6 months granted on a case-by-case basis by the concerned authorities. The validity of the Medical Attendant Visa aligns with the principal e-visa holder's visa period.

The Ministry of Tourism introduced the Incredible India Tourist Facilitator (IITF) Certification Programme, providing online training and accreditation nationwide to create a skilled workforce and more job opportunities, even in remote areas. Additionally, the Ministry launched a digital platform (e-Marketplace) on August 12, 2022, to directly create job opportunities⁶⁹.

⁶³ Ministry of Tourism. (2021). National Strategy for Sustainable Tourism. Retrieved from https://tourism.gov.in/sites/default/files/2022-05/National%20Strategy%20for%20Sustainable%20tourism_0.pdf

⁶⁴ Ministry of Tourism. (2022). National Strategy for Eco Tourism. Retrieved from <https://tourism.gov.in/sites/default/files/2022-09/National%20Strategy%20for%20Ecotourism%202022.pdf>

⁶⁵ Ministry of Tourism. (2022). National Strategy and Roadmap for Medical and Wellness Tourism. Retrieved from <https://tourism.gov.in/sites/default/files/2022-05/National%20Strategy%20and%20Roadmap%20for%20Medical%20and%20Wellness%20Tourism.pdf>

⁶⁶ Ministry of Tourism. (2022). National Strategy for Adventure Tourism. Retrieved from <https://tourism.gov.in/sites/default/files/2022-09/National%20Strategy%20for%20Adventure%20Tourism%202022.pdf>

⁶⁷ Ministry of Tourism. (2021). National Strategy and Roadmap for Development of Rural Tourism in India - An initiative towards Atmanirbhar Bharat <https://tourism.gov.in/whats-new/national-strategy-and-roadmap-development-rural-tourism-india-initiative-toward>

⁶⁸ Ministry of Tourism, Government of India. (2023). Annual Report 2022-23. Retrieved from: https://tourism.gov.in/sites/default/files/2023-02/MOT%20Annual%20Report_2022-23_English.pdf.

⁶⁹ Incredible India. (n.d.). Incredible India Tourist Facilitator (IITF) Certification Programme. Retrieved from: <https://iitf.gov.in/>.

2.3. Future of Tourism and Hospitality

Emerging Tourism Trends

Along with government initiatives, the Indian government plans to invest \$56 billion in tourism by 2030, with a special emphasis on emerging tourism types such as cruise tourism, eco-tourism, and adventure tourism⁷⁰. We will now explore each of these aspects briefly to understand the contributions to the evolving landscape of the tourism industry.

Adventure Tourism

Adventure tourism is a specialized segment of the tourism industry that receives special attention from the Ministry of Tourism. India possesses a unique advantage with its diverse landscapes, including 70 percent of the Himalayas, a coastline stretching over 7,000 kilometers, and ranking 10th globally in forest cover. Notably, India is among the few countries worldwide that boast both hot and cold deserts⁷¹. To foster the growth of adventure tourism, a national strategy has been devised to cultivate an ecosystem that promotes synergy between the central and state governments. The objective is to enhance India's standing in the Adventure Tourism Development Index (ATDI), a global ranking prepared by the Adventure Travel Trade Association (ATTA).⁷² With this objective, the Ministry initiated efforts to impart diverse adventure tourism skills through institutions like the Indian Institute of Travel and Tourism, the National Institute for Water Sports, and the National Institute of Skiing and Mountaineering. Furthermore, numerous training establishments operated by the central ministries and state governments are actively engaged in this endeavor. The Ministry of Tourism will rank states according to skill training and capacity building for local communities, while state governments will identify the specific capacity requirements of these communities, aiming to harness the potential of adventure tourism for job creation and entrepreneurship opportunities. As adventure tourism continues to flourish, there will be a substantial demand for skilled professionals like rafting guides, paragliding guides, tour operators etc.

Eco Tourism

Eco-tourism is part of sustainable and nature tourism. India ranks sixth globally in UNESCO Natural Heritage sites, highlighting its rich natural heritage and importance in eco-tourism⁷³. The eco circuit, part of the Swadesh Darshan Scheme, promotes eco-tourism nationwide and, the Amrit Dharohar scheme focuses on wetland preservation, creating more eco-tourism opportunities and local income generation⁷⁴. Given the increasing importance of eco-tourism, education and skill training of workers within the industry are crucial for enhancing eco-tourism experiences. This includes training programs for guides and naturalists, covering various tasks such as interpretation and entrepreneurship in the hospitality industry. Under National Strategy of Ecotourism, these specialized training modules cover a range of tasks, such as tourist guides, natural science interpreters, patrol partners for protection work, and skill development for aspiring entrepreneurs in the small-scale homestead-based hospitality industry⁷⁵.

Wellness and Medical Tourism

India's reputation in medical tourism is globally recognized, with India ranking 10th on the Medical Tourism Index (MTI) for 2020-21 among 46 countries worldwide⁷⁶. It has also secured 12th place among the top 20 wellness tourism markets and ranked 5th in the wellness tourism markets in the Asia-Pacific region. The Ministry of Health and Family Welfare has taken proactive measures, including relaxing medical visa policies and implementing the 'Heal in India' initiative, to further promote wellness and medical tourism in the country.

Medical and wellness tourism attracted 21 percent of total foreign tourist arrivals, which roughly accounts for 0.32 million in 2020-21 majority of which was from South Asia (68 percent), followed by West Asia (61 percent) and Africa (40 percent)⁷⁷. India's world-class healthcare facilities offered at relatively lower costs, make it an attractive destination for medical tourists. However, the COVID-19 pandemic led to a decline in medical tourist numbers, with a negative

⁷⁰ Invest India (n.d.). Tourism and Hospitality sector. Retrieved from: <https://www.investindia.gov.in/sector/tourism-hospitality>.

⁷¹ Invest India (n.d.). Tourism and Hospitality sector. Retrieved from: <https://www.investindia.gov.in/sector/tourism-hospitality>.

⁷² Ministry of Tourism. (2022). National Strategy for Adventure Tourism. Retrieved from <https://tourism.gov.in/sites/default/files/2022-09/National%20Strategy%20for%20Adventure%20Tourism%202022.pdf>

⁷³ Ministry of Tourism. (2022). National Strategy for Ecotourism. Retrieved from <https://tourism.gov.in/sites/default/files/2022-09/National%20Strategy%20for%20Ecotourism%202022.pdf>.

⁷⁴ Ministry of Tourism. (2022). Eco Theme in 'Swadesh Darshan'. Retrieved from <https://pib.gov.in/Pressreleaseshare.aspx?PRID=1797238>.

⁷⁵ Ministry of Tourism. (2022). National Strategy for Ecotourism. Retrieved from <https://tourism.gov.in/sites/default/files/2022-09/National%20Strategy%20for%20Ecotourism%202022.pdf>.

⁷⁶ Ministry of Health and Family Welfare. (2023). Update of Improving Medical Tourism in the country. Retrieved from <https://pib.gov.in/PressReleasePage.aspx?PRID=1909087>

⁷⁷ Ministry of Tourism. (2022). India-Tourism Statistics. Retrieved from <https://tourism.gov.in/sites/default/files/2022-09/India%20Tourism%20Statistics%202022%20%28English%29.pdf>.

growth rate of 79.4 percent in 2019-20⁷⁸. In 2019, the total number of international patients reached 0.7 million, contributing to an estimated market size ranging from US\$ 5 billion to 6 billion⁷⁹. Despite this setback, the medical tourism sector is expected to rebound and grow at an impressive CAGR of 21 percent from 2019-20 to 2026-27⁸⁰.

Cruise Tourism

India holds an extensive network of 12 major and 200 minor ports, along with several attractions spread across 7500 kilometers of coastline and vast river systems. While the global cruise tourism market is valued at approximately US\$ 8 billion, India currently holds an estimated share of 1 percent (~ US\$ 100 million)⁸¹.

Post-pandemic, India's tourism sector is experiencing a rebound, with cruise tourism alone recording year-on-year growth rate of 35 percent⁸². To leverage this momentum further, port-led development initiatives are creating a comprehensive ecosystem that smoothly integrates transport and tourism. The government has actively undertaken several reformative measures, including the implementation of a Cruise shipping Policy and the introduction of various schemes offering Central Financial Assistance for the development of tourism infrastructure, such as ports and ferries across the country.⁸³ To ensure the success of coastal and river cruise tourism, destination-based skilling becomes crucial. This proactive approach ensures that identified cruise tourism destinations are well-equipped to cater to the future demand for specific skills, especially in areas such as cruise ship building and recycling. Collaboration with the shipping ports and waterways ministry, particularly in states with high cruise tourism potential, will support essential aspects like training, job postings, and recruitment in this field.

Technological Changes

Apart from the emergence of newer forms of tourism within the industry, technology is fundamentally altering the way people travel, fuelling innovation, fostering growth and driving globalization within the travel industry. Destination marketers may now engage with stakeholders and customers more widely than in the past, thanks to digital disruptors like social media, mobile devices and readily available information. The industry has expanded quickly with the use of technological innovations such as mobile payments, social media, high-speed internet access, and search and geolocation capabilities. Within the private sector, large digital platforms have surfaced to address various needs, such as travel, accommodation, tour packages, meal ordering and delivery.

Big Data and Artificial Intelligence

Innovation and modernization of the travel sector are being fostered through the application of artificial intelligence (AI) and big data analysis. By analysing data, organizations can now predict client preferences and emerging trends, resulting in more personalized care, reduced costs, and improved operational efficiency⁸⁴.

Contactless Payments

The most practical way to conduct purchases is now through contactless payments. Not only can contactless payments improve the consumer experience, but it also provides a secure method of payment. To protect the safety of both their staff and clients, numerous travel and hospitality firms have transitioned to contactless payment methods. Many hotels are using QR codes, which are easily scanned through mobile devices without requiring direct interaction with hotel staff. From menus to in-stay services, upsells to cross-sells, everything could be done online, including check-ins and check-outs.

Virtual Reality

The aviation sector has fully embraced augmented and virtual reality technologies. Numerous businesses are testing virtual reality as a component of their in-flight entertainment programs. These immersive experiences are going to help draw in more business in the sector, as it provides an engaging 3D e-learning environment with realistic visual and auditory experiences. It is also utilized for cabin crew training, which further promotes effective customer service⁸⁵.

⁷⁸ IBEF. (2022). India's Tourism sector on the rise. Retrieved from <https://www.ibef.org/blogs/india-s-tourism-sector-on-the-rise>.

⁷⁹ Ministry of Tourism. (2022). National Strategy and Roadmap for Medical and tourism. Retrieved from <https://tourism.gov.in/sites/default/files/2022-05/National%20Strategy%20and%20Roadmap%20for%20Medical%20and%20Wellness%20Tourism.pdf>.

⁸⁰ IBEF. (2023). India Tourism and Hospitality Industry Analysis. Retrieved from <https://www.ibef.org/industry/indian-tourism-and-hospitality-industry-analysis-presentation>.

⁸¹ Ministry of Tourism. (2023). Draft National Strategy for Cruise tourism. Retrieved from <https://static.pib.gov.in/WriteReadData/specificdocs/documents/2023/jun/doc2023627218001.pdf>.

⁸² Ministry of Ports. (2022). Cruise Tourism in India. Retrieved from <https://pib.gov.in/PressReleaseSelfFramePage.aspx?PRID=1825354>.

⁸³ Ministry of tourism. (n.d.). Cruise Shipping. Retrieved from <https://tourism.gov.in/cruise-tourism-0>.

⁸⁴ Ministry of Tourism, Government of India. (2022). Report on National Digital Tourism Mission. Retrieved from: https://tourism.gov.in/sites/default/files/2022-09/National%20Digital%20Tourism%20Mission_2022.pdf.

⁸⁵ Interglobe. (2024). Technology Trends in Travel and Tourism Industry. Retrieved from: <https://www.interglobe.com/technology-trends-in-travel-and-tourism-industry>.

Virtual technology adoption in India's tourism and hospitality sector is growing, but it is still relatively small. Virtual safaris, museum and gallery tours, and exhibitions are among the virtual experiences that the Ministry of Tourism has begun to offer through its webinar series, 'Dekho Apna Desh'. Collaborating with foreign colleges, especially those that specialize in history and architecture, could be the next step for virtual tourism. India may also use the live virtual religious tourism channel. For instance, a significant Buddhist pilgrimage destination in Bihar called Bodh Gaya draws a sizable influx of visitors each year. Consideration could be given to live streaming of these important pilgrimage sites' daily routines.⁸⁶

Biometric Technology

Biometric technology has the potential to improve the efficiency of interactions and the purchasing process. Because it enables visitors to access their rooms by thumb or face scanning, it can be quite helpful in hotels. Instead of needing a signature and room number, guests who wish to charge products to their rooms would only need to provide a thumb scan. If consumers could enter a restaurant in a hotel and leave with the bill automatically transferred to their room through facial recognition, that would be an even more seamless experience for them⁸⁷.

Robotics and Automation

In the travel sector, robotics and speech technology are already causing waves. Voice-activated gadgets in hotel rooms help customers check the weather, recommend restaurants and check traffic. AI robots are already helping customers check in at some hotels, negating the need for human interaction. The use of various robots, including self-driving luggage carts, cleaning robots, and robots that can respond to passenger inquiries about boarding gates and flight schedules, has also been tested in airports. Regardless of personnel availability, chatbots are always ready to respond to customers' questions, 24/7. It has become more and more important to comply with contemporary customer service requirements. With the tourism industry undergoing several changes, the emphasis on skill development becomes crucial to adapting to these evolving dynamics.

2.4. Skilling in Tourism Sector

In view of technological advancements, emerging various types of tourism, and shifts in consumer behavior, are leading to a change in the employment scenario in the tourism and hospitality industry. With this transformation, the industry remains a crucial driver of India's economic growth and employment landscape. Between 2017 and 2022, the expected growth in demand for workers in the tourism, hospitality and travel sector was around 5 percent. This meant that about 49 lakh individuals needed training in the industry during this time. India can improve its reputation as a global tourism and hospitality hub by training a skilled workforce that can keep up with technology and changing consumer preferences⁸⁸. Therefore, by developing a proficient workforce capable of adapting to technological advancements and aligning with evolving consumer preferences, India is positioned to strengthen its global standing as a hub for tourism and hospitality.

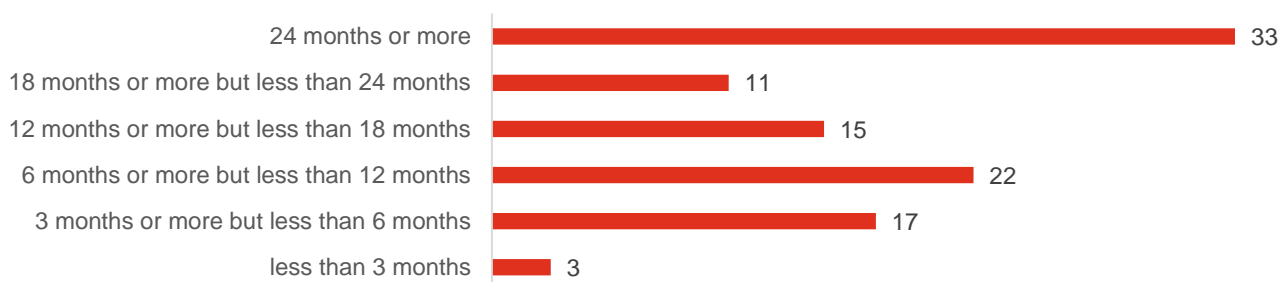
Looking into the current training scenario in the tourism and hospitality sector provides valuable insights into the immediate need for training in the industry. According to the data from Periodic Labour Force Surveys 2022-23, only 1 percent of the workforce had undergone any form of training within this sector. About 83 percent of those trained were enrolled in full-time programs. 12 percent of those trained had received on-the-job training, while only 5 percent, took part in part-time training. Of the 1 percent trained in the sector, individuals come from various educational backgrounds. 42 percent of the trained individuals held a bachelor's degree or its equivalent, 28 percent had completed higher secondary education level, and 15 percent had completed diploma or certificate courses. On the other hand, individuals with secondary education level made up 3 percent. These figures emphasize the importance of prioritizing skill development initiatives to adequately prepare the tourism and hospitality workers for the upcoming changes in the sector.

⁸⁶ Startup India, Government of India. (2024). Travel and Tourism Sector in India. Retrieved from <https://www.startupindia.gov.in/content/sih/en/blogist/blogs/TourismSector.html>.

⁸⁷ Interglobe. (2024). Technology Trends in Travel and Tourism Industry. Retrieved from: <https://www.interglobe.com/technology-trends-in-travel-and-tourism-industry>.

⁸⁸ Ministry of Skill Development and Entrepreneurship, Government of India. (2023). Annual Report 2022-23. Retrieved from: <https://www.msde.gov.in/en/reports-documents/annual-reports>.

FIGURE 6: DURATION OF TRAINING RECEIVED BY YOUTH (%) IN THE TOURISM AND HOSPITALITY SECTOR



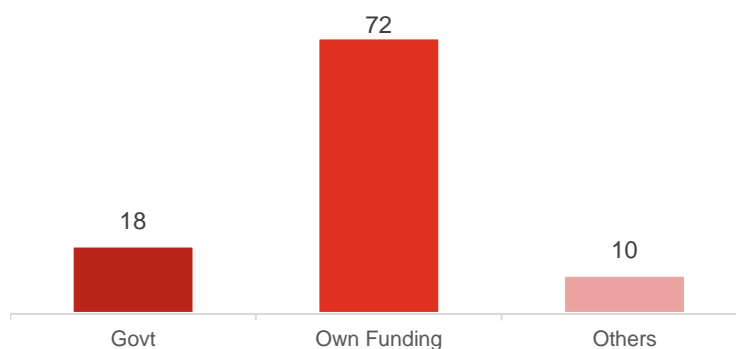
Source: Periodic Labour Force Survey, Unit Level data, 2022-23

Out of the trained workforce, the technical education levels within the tourism and hospitality workforce exhibit diverse patterns. 56 percent of these individuals lack formal technical education, indicating a potential gap in the workforce's formal technical training. Delving deeper into the duration of training in the tourism and hospitality sector, we found that 33 percent of the trained individuals have undergone training lasting 24 months or more, and 22 percent of individuals have engaged in training for a duration of 6 months or more but less than 12 months. The category of 3 months or more but less than 6 months includes 17 percent of individuals. Moreover, 15 percent of individuals have undergone training for 12 months or more but less than 18 months.

The source for training is analyzed in order to understand the funding source for the trainings. The main source of funding for the training received by youth was through their own funding (72 percent), followed by the government (18 percent) and others (10 percent).

The state-wise distribution of the workforce receiving training in the tourism and hospitality sector offers insights into the regional dynamics of skill development. Maharashtra, West Bengal, Rajasthan, Kerala and Bihar are the top states, with more than 50 percent of individuals receiving the training in tourism and hospitality sector⁸⁹.

FIGURE 7: SOURCE OF FUNDING OF TRAINING RECEIVED BY YOUTH (%) IN TOURISM AND HOSPITALITY SECTOR



Source: Periodic Labour Force Survey, Unit Level data, 2022-23

⁸⁹ National Statistical Office. (2021). Periodic Labour Force Survey (July 2022-June 23). Ministry of Statistics and Programme Implementation, Government of India. Retrieved from: https://www.mospi.gov.in/sites/default/files/publication_reports/AR_PLFS_2022_23N.pdf?download=1.

3. Voice of Youth

To address the evolving landscape of the tourism and hospitality sector and the dynamic skill requirements within the industry, we undertook an aspiration survey with youth. Our primary goal was to gain insights into the perspectives of youth concerning skill development, their career aspirations, their comprehension of training needs, and their understanding of technological advancements within the tourism and hospitality industry. Covering 121 districts across 20 states and 6 Union Territories of India, we interviewed 10,158 youth (aged between 15-34 years). The state wise coverage of sample is presented in Annexure A.

The survey included four distinct groups of youth. The first category comprised of students actively pursuing education in tourism, hospitality, or related fields, referred to as 'students in education.' The second and third group included young individuals with 0-3 years of work experience in the industry, categorized as either wage-employed (termed as 'waged or salaried youth') or self-employed and entrepreneurs (termed as 'self-employed youth'). Lastly, the fourth category consisted of youth not currently engaged in education, employment or training, referred to as 'NEET.' This segmentation allowed for a comprehensive exploration of the perspectives and experiences within the youth population in the context of the tourism and hospitality sector. To ensure a balanced and representative sample, the survey methodically covered youth participants from all four specified categories (as shown below).

TABLE 2: CATEGORY WISE YOUTH COVERAGE (IN %)

Educational/economic status	In percentage (%)
Student in education/ training	27
Waged/salaried employed	24
Self-employed or entrepreneurs	25
Neither in education, nor in training or employed (NEET)	25
Total	100

N = 10,158

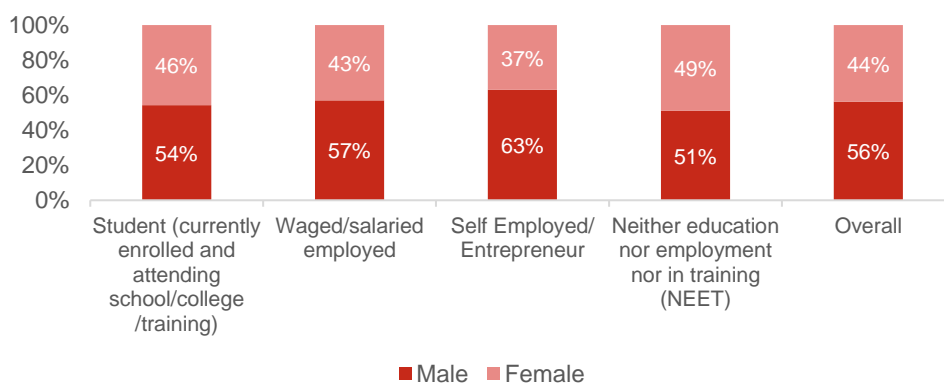
Question: What is your current economic or educational status?

The following sub-section(s) dissect the profile and key findings across the four categories of youth, providing a detailed breakdown of the results to capture the distinct responses within each category.

3.1. Profiling of the Surveyed Youth

Overall, the surveyed youth exhibited a diverse geographical distribution, with 55 percent hailing from urban areas, 30 percent from rural regions and the remaining 15 percent from semi-urban locales. To gain insights into the financial background of the surveyed youth, we inquired about their monthly household income. Among the 10,158 respondents, 84 percent provided information on their household earnings. Within this group, 43 percent reported belonging to families with a monthly household income ranging from INR 5000 to INR 20000, while 34 percent fell within the INR 20000 to INR 35000 bracket. The remaining 23 percent disclosed a monthly household income of INR 35001 and above. Respondents covered in the study were predominantly young, with an average age of 25 years, and 57 percent were within the age

FIGURE 8: DISTRIBUTION OF YOUTH ACROSS THEIR EDUCATION OR EMPLOYMENT STATUS



N = 10,158

Question: What is your current economic or educational status?

covered in the study were predominantly young, with an average age of 25 years, and 57 percent were within the age

bracket of 15 years to 25 years. A gender wise analysis shows that 56 percent of the youth was males and 44 percent were females. The survey also maintained gender balance within each of the four distinct categories of surveyed youth. This deliberate effort aimed to ensure a balanced representation of both male and female participants across various categories.

Students in Education/Training

Educational Background

We outlined the educational and career-related profile of the 25 percent (i.e. 2,708 individuals) of surveyed students who were actively engaged in education or training during the survey. We asked the students about the area of their education and found that the surveyed students were studying in sectors closely associated with tourism and hospitality. These included

Electricity and Water Utility, Wholesale and Retail, Financial Services, IT and Communication (ICT), Real Estate, Administrative Services, and Food and Beverage. We found that 35 percent of the students were pursuing their training in courses related to the tourism and hospitality, 6 percent in electricity and water utility, 6 percent in financial services and 5 percent in ICT. Those pursuing education in the

FIGURE 9: SHARE (IN PERCENTAGE) OF YOUTH PURSUING EDUCATION ACROSS VARIOUS SUB-SECTORS OF TOURISM AND HOSPITALITY



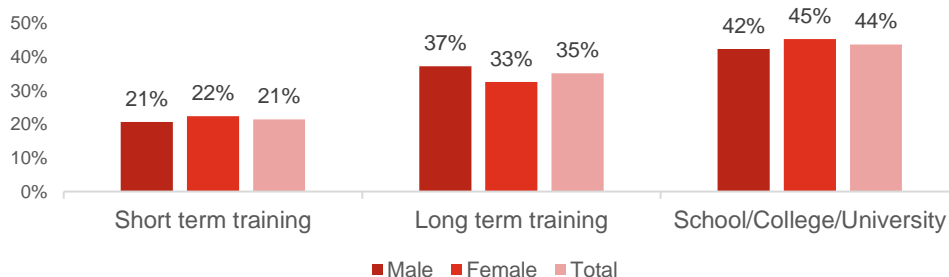
N = 942

Question: In which subsector within tourism and hospitality you are currently attaining education?

tourism and hospitality sector were further inquired about the sub-sectors they were attaining education in. Within this group of 35 percent students, approximately 45 percent were studying a course related to the hotel sub-sector. Remaining of the respondents are distributed across sub-sectors such as food services, facility management, tourism and travel and cruise liners. The findings do not vary across gender.

Further, to understand whether the student is enrolled in education or vocational and skill training, we inquired about their engagement into either of the three segments: college and university enrollment, long-term training (duration exceeding 1 year), and short-term training (up to 1 year). The overall

FIGURE 10: SHARE (IN PERCENTAGE) OF YOUTH IN EDUCATION PURSUING TYPE OF EDUCATION/SKILL TRAINING, GENDER WISE



N = 2,708

Question: Where are you currently enrolled - in education or vocational training/ skill training?

distribution revealed that 44 percent of the students were enrolled in college and university, 35 percent in long-term training and 21 percent in short-term training. A gender-wise analysis indicated that a slightly higher proportion of male students (37 percent) were involved in long-term training compared to females (33 percent). Conversely, more females (45 percent) were enrolled in college and university compared to males (42 percent). 21 percent of the males and females each were engaged in short-term training.

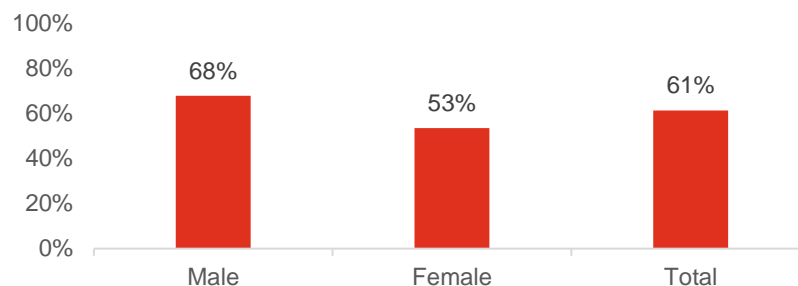
To gain a more granular understanding of short-term training, we inquired about the specific sub-sectors in which the students were pursuing their short-term training. The findings indicate that more than one-third (36 percent) of those in short-term training were undertaking a certificate course in hotels, 34 percent in facility management, 13 percent in food services and 17 percent in tourism and travels. In our inquiry into the specific types of short-term training or

certifications pursued by students, we discovered that within the cohort focusing on short-term courses in hotels, the top three courses were: assistant chef (32 percent), banquet operations (8 percent), and duty manager (7 percent). For those engaged in facility management-related short-term courses, 31 percent were pursuing courses related to multi-purpose associate roles, 30 percent for billing executive positions, and 13 percent for the facility manager type of job role. In the food services category, the most frequently pursued courses included barista executive (25 percent), assistant chef (17 percent), and counter sales executive (15 percent).

Work preferences

To understand aspirations of students enrolled in education or training, we inquired about their willingness to pursue work after completing their current level of education. The findings revealed that 61 percent of youth expressed a readiness to enter the workforce after completing their current education and training. When segmented by training types, 69 percent of those in long-term training expressed their willingness to work, compared to 55 percent in short-term training and 56 percent in college and university. Across gender, a larger proportion of males (68 percent) are willing to pursue work compared to females (53 percent).

FIGURE 11: SHARE OF YOUTH (IN PERCENTAGE) WHO PLAN TO WORK AFTER COMPLETING THEIR CURRENT LEVEL OF TRAINING/EDUCATION, GENDER WISE

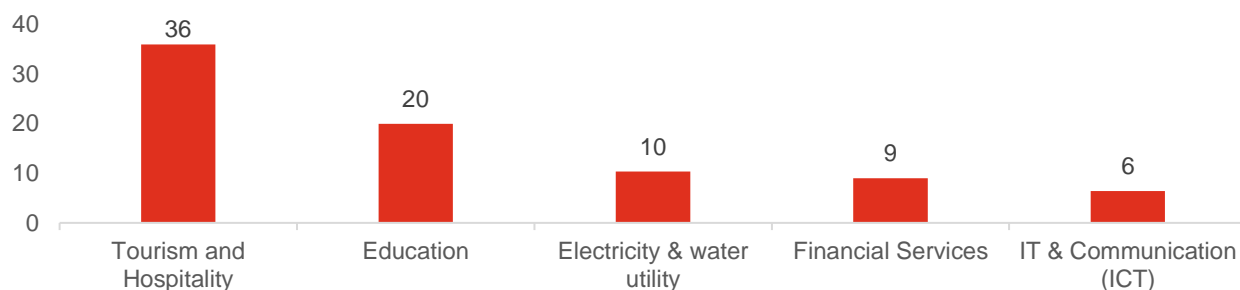


N = 2,708

Question: Do you plan to work after completing your current level of education?

Further, when we asked the students about the nature of jobs they would like to pursue, we found that 77 percent of students showed an inclination towards waged or salaried jobs, while 23 percent expressed an interest in self-employment. Among those willing to enter the workforce, 51 percent had already commenced their job search or started working on their business ideas. We further inquired about the type of job search method being used by the students interested in waged or salaried jobs. We found that education institutions play a significant role, with 58 percent utilizing this avenue, followed by job fairs (44 percent), and direct application to employers (37 percent). For those expressing an interest in self-employment, 63 percent had initiated the process to arrange for their business funds, 55 percent had arranged infrastructure, and 20 percent had begun paperwork such as licenses and goods and services tax (GST) filing.

FIGURE 12: SHARE OF YOUTH (IN PERCENTAGE) WILLING TO WORK ACROSS VARIOUS SECTORS AFTER COMPLETING THEIR EDUCATION

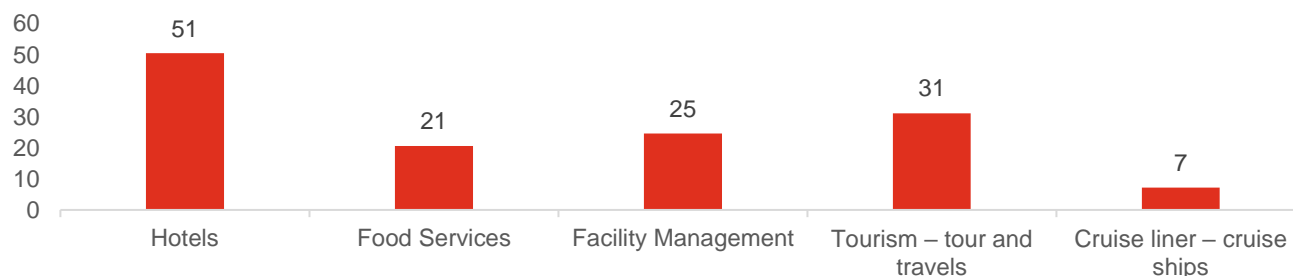


N = 1,656

Question: Ideally, in which one industry would you like to work or initiate a business after completing your current level of education? This was a multiple-choice question and hence responses may not add up to 100%.

To understand the career preferences of the 61 percent of students willing to work, we inquired about the sectors such students were willing to work in. We found that 36 percent aspire to work in tourism and hospitality, 20 percent in education and 10 percent in the electricity and water utility sectors. Among the students aspiring to join the tourism and hospitality industry, working in the hotels is most appealing with 51 percent expressing a desire to work in this sector. This is followed by tourism and travels at 31 percent and facility management at 25 percent.

FIGURE 13: SHARE (IN PERCENTAGE) OF YOUTH WILLING TO WORK ACROSS VARIOUS SUB-SECTORS OF TOURISM AND HOSPITALITY



N = 591

Question: Which sub-sector would you like to be employed in or a run a business within the Tourism and Hospitality Industry?

This was a multiple-choice question and hence responses may not add up to 100%.

We also inquired about the job roles that students find most appealing within each sub-sector. The students find roles of an Assistant Chef (45 percent) and Duty Manager (13 percent) as most appealing within the hotels. In the tourism and travels sector, the roles of Adventure Travel Guide (36 percent) and Customer Service Executive (Meet and Greet) (17 percent) were particularly attractive. Meanwhile, in facility management, positions such as Billing Executive (27 percent), Facility Management Executive (16 percent), and Facility Manager (14 percent) stood out as the most appealing roles.

Employed (Waged/Salaried) Youth

Basic Profile

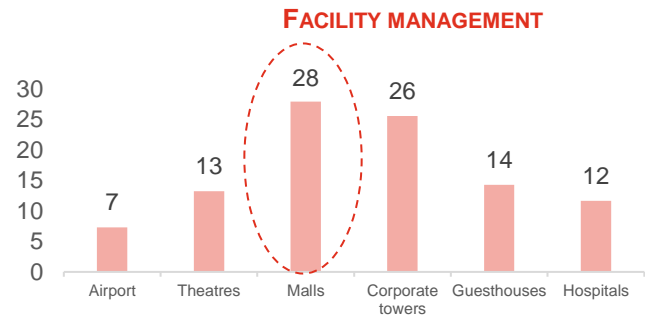
This section provides a brief overview of the work profile of the surveyed youth currently engaged in a waged or salaried job within the tourism and hospitality sector, constituting 24 percent of the total surveyed youth. Within this group, the survey specifically focused on employed youth with 0-3 years of experience in the sector. Additionally, the employed youth worked in one of the following sub-sectors: (i) Hotels; (ii) Food Services; (iii) Facility Management; (iv) Tourism – Tours and Travels; (v) Cruise liners - Cruise Ships. Approximately one-third of the working youth (31 percent) were employed in facility management, followed by hotels (26 percent) and food services (24 percent). For those in facility management, 28 percent were working in malls, and 26 percent in corporate towers. Within the hotels sector, 46 percent of the youth was employed in budget hotels and 43 percent in the food services sector, including fast food and quick-service restaurants.

FIGURE 14: SHARE (IN PERCENTAGE) OF WAGED AND/OR SALARIED YOUTH EMPLOYED ACROSS VARIOUS SUB-SECTORS OF TOURISM AND HOSPITALITY



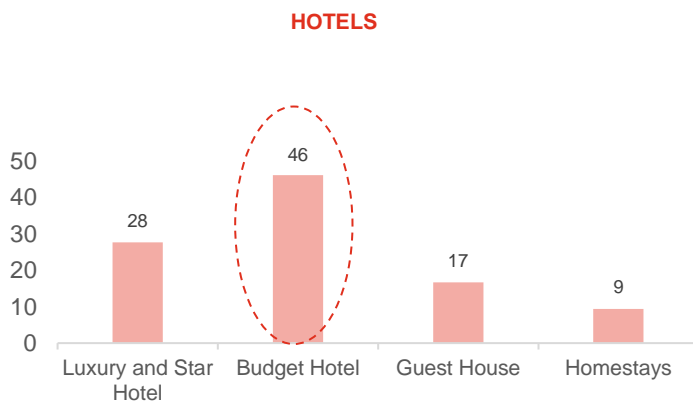
N = 2,458

Question: Which sub-sector are you employed in the Tourism and Hospitality Industry?



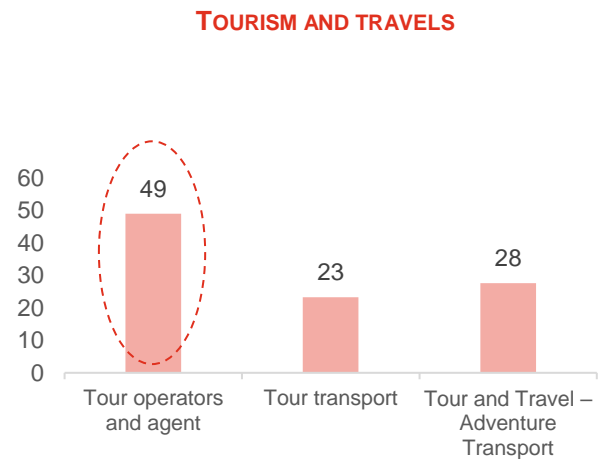
N = 753

Question: What is the category of the firm (you are employed with) within the sub-sector of Facilities Management?



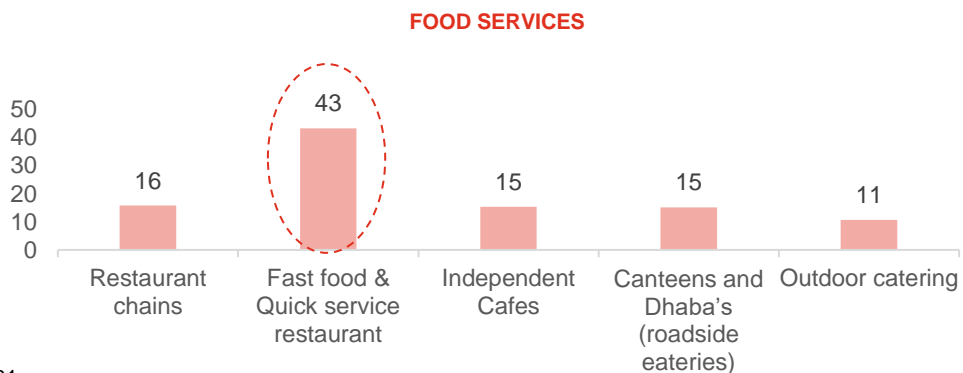
N = 644

Question: What is the category of the firm (you are employed with) within the sub-sector of hotels?



N = 457

Question: What is the category of the firm (you are employed with) within the sub-sector of Tourism and Travels?



N = 581

Question: What is the category of the firm (you are employed with) within the sub-sector of Food Services?

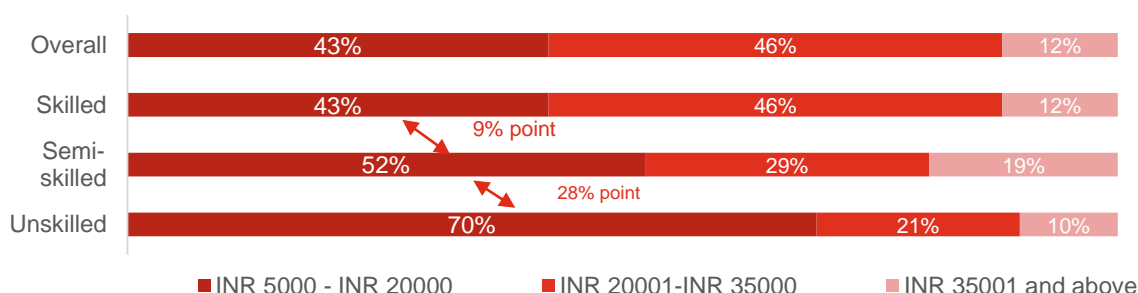
We also inquired the wage and salaried youth about their perception of their own skill level to categorize them into skilled/unskilled/semi-skilled categories⁹⁰. We find that majority of wage and salaried youth (72 percent) categorized themselves as either semi-skilled or skilled workers, while remaining (27 percent) consider themselves as unskilled.

Wages Earned

In our examination of the monthly earnings of wage and salaried workers, we found that among the 89 percent of youth willing to disclose their earnings, 43 percent earned between INR 5000 and INR 20000, 46 percent earned between INR 20001 and INR 35000, and only 12 percent earned above INR 35000 monthly. Monthly salaries demonstrate an ascending pattern corresponding to the perceived skill levels of the workers. Breaking down the findings further, a majority of unskilled workers (70 percent) earned between INR 5000 and INR 20000, while this share decreases to 52 percent for semi-skilled and 43 percent for skilled workers. Similarly, the share of workers earning between INR 20001 and INR 35000 increased with an increase in skill level (46 percent for skilled workers, 29 percent for semi-skilled and 21 percent for unskilled workers).

Furthermore, the wage gap between semi-skilled and unskilled workers is more pronounced than the wage difference between semi-skilled and skilled workers. Specifically, there is a 28-percentage point difference in proportion of semi-skilled and unskilled workers earning between INR 5000 and INR 20000. This is in contrast to 9-percentage point difference observed between skilled and semi-skilled workers.

FIGURE 15: SHARE OF WAGE AND SALARIED WORKERS EARNING WITHIN CERTAIN MONTHLY WAGE BRACKET, AS PER THEIR SKILL LEVEL



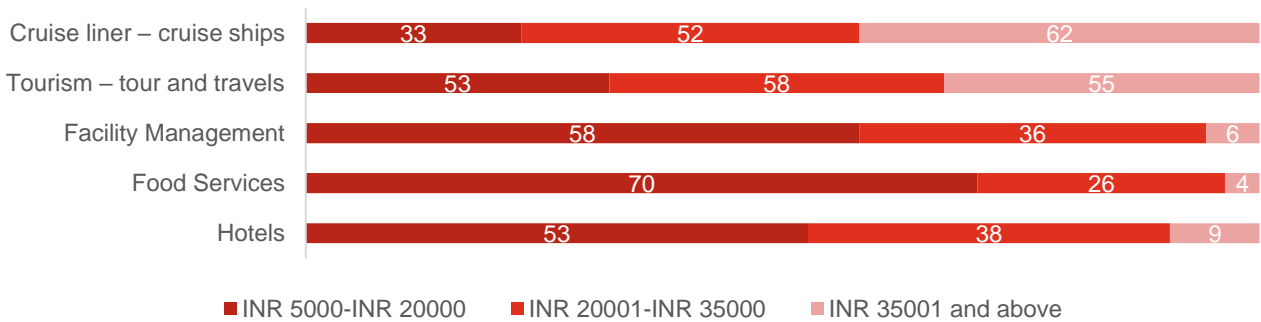
N = 2260

Question: How much do you earn per month from your current job?

We further segregated the findings as per the workers working in the sub-sector. We found that the income distribution varies across sub-sectors. Like 70 percent of workers in food services earned less than INR 20,000 per month and within cruise liners and tourism, over half of the workers (62 percent) earned above INR 35,000 per month. In hotels, tourism and travels and facility management, more than half of the workers (53 percent, 53 percent, and 58 percent, respectively) earned less than INR 20,000. However, within the tourism and travel sub-sector, 58 percent of workers earned between INR 20,000 and INR 35,000, compared to 38 percent in hotels and 36 percent in facility management, showcasing that relatively more organized segments, such as cruise liners, tend to pay higher wages compared to the relatively more unorganized sector, such as food services. There were however no major differences across sub-categories within these sub-sectors, and across gender.

⁹⁰ Unskilled work is defined as work that requires little or no independent judgement /previous experience although familiar with occupational environment; Semi-skilled work is defined as work that has a well-defined nature of work wherein the major requirement is not for judgement or skill but for proper discharge of duties; skilled work is defined as work that requires exercising considerable independent judgement and of discharge of duties with responsibilities.

FIGURE 16: SHARE OF WAGE AND SALARIED WORKERS EARNING WITHIN CERTAIN MONTHLY WAGE BRACKET, AS PER THE SUB-SECTOR

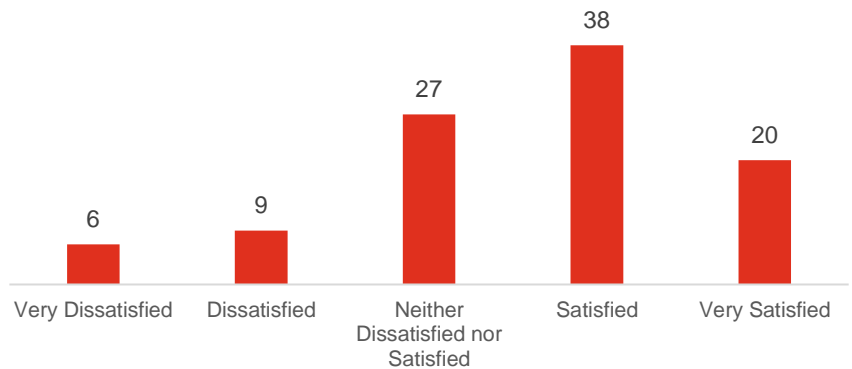


N = 2260

Question: How much do you earn per month from your current job?

We further tried to understand the overall job satisfaction among workers. We asked about their work contentment. The findings indicate that 58 percent of the workers express satisfaction or high satisfaction with their work, while 15 percent report dissatisfaction or significant dissatisfaction with their work. Within the subset of individuals expressing dissatisfaction with their work, low wages emerge as a primary factor contributing to their discontent. Interestingly, among workers who express satisfaction with their work, 61 percent attribute their contentment to wages. This underscores the pivotal role that wages play in influencing job satisfaction within the surveyed workers in the tourism and hospitality sector.

FIGURE 17: SHARE (IN PERCENTAGE) OF WAGED AND/OR SALARIED EXPRESSING THEIR SATISFACTION (OR DISSATISFACTION) WITH THEIR JOB



N = 2458

Question: How satisfied are you with the quality and nature of your work?

Working Hours and Overtime Pay

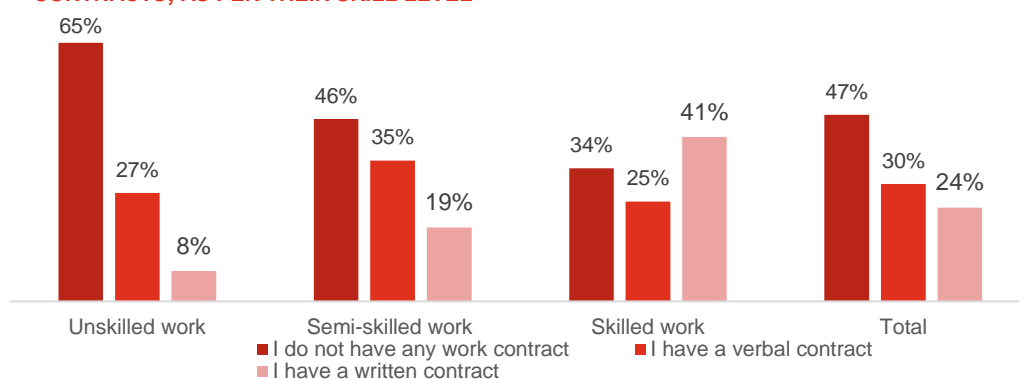
In our inquiry about the number of days worked in a week, we found that 62 percent of workers work 6 days per week on an average. Regarding working hours, we asked workers about their designated working hours per day on average. Notably, 80 percent of workers indicated that 8 hours is the designated working hours per day. However, only 39 percent adhere to these hours, while the remaining 61 percent work more than 8 hours per day, often extending up to 15 hours. The average working hours fall between 10-11 hours per day. In terms of compensation for overtime work, we found that among workers exceeding their designated hours, only 41 percent receive overtime pay. A sub-sector level analysis reveals that only 44 percent of hotels provide overtime wages, compared to 50 percent of cruise liner employers. This shows that workers in the tourism and hospitality sector often deal with difficult working hours, and only a few receive overtime pay.

Contract Coverage

To understand the working conditions within the tourism and hospitality sector, we investigated the coverage of work contracts among workers. The overall coverage of contract prevalence is relatively low, with only 53 percent having either written or verbal contracts. The remaining 47 percent do not have any sort of contract. Contract coverage varies significantly based on workers' skill levels. Specifically, 65 percent of unskilled workers lack any form of contract, compared to 46 percent of semi-skilled workers and 34 percent of skilled workers. The coverage of written contracts also varies with skill level of the workers, with 41 percent of skilled workers possessing a written contract, compared

to only 19 percent of semi-skilled workers and 8 percent of unskilled workers. This reveals that unskilled workers often lack formal contracts, semi-skilled workers rely on either no contract or verbal agreements, while skilled workers predominantly operate under written contracts.

FIGURE 18: SHARE (IN PERCENTAGE) OF WAGED AND/OR SALARIED YOUTH COVERED BY CONTRACTS, AS PER THEIR SKILL LEVEL



A sub-sector wise analysis reveals distinct patterns in contract

N = 2458

Question: In this job, do you have a written or a verbal contract?

prevalence. In the food services sector, over half of the workers (52 percent) operate without any written contracts, followed by hotels (46 percent) and facility management (46 percent). In contrast, tourism and travels, as well as cruise liners, exhibit the highest coverage of written contracts (29 percent and 26 percent, respectively) among these sub-sectors. A further categorical analysis shows that only 50 percent of the workers working in specific segments of the food services sector, such as independent cafes, canteens, Dhabas, and outdoor catering, are covered with written contracts.

FIGURE 19: SHARE (IN PERCENTAGE) OF WAGED AND/OR SALARIED YOUTH COVERED BY CONTRACTS, AS PER THEIR SUB SECTORS



N = 2458

Question: In this job, do you have a written or a verbal contract?

Self-Employed Youth

Basic Profile

This section provides a brief overview of the work profile of the surveyed youth currently engaged in self-employed or entrepreneurial work within the tourism and hospitality sector, constituting 25 percent of the respondents (2,486 individuals). It is important to note that the survey specifically focused on youth with 0-3 years of experience in the surveyed youth working in self-employed or entrepreneurial ventures. sector to gather the information about entry-level workers. Additionally, similar to waged or salaried persons, approximately one-third of the surveyed self-employed youth (39 percent) were employed food services, followed by hotels (28 percent) and tourism and travels (21 percent). For those in food services, 45 percent were working in fast food and quick service restaurants. Within

the hotels sector, 42 percent of the youth was employed in budget hotels. In the tourism and travel sector, tour transport employed 48 percent of the surveyed youth in self-employed positions.

FIGURE 20: SHARE (IN PERCENTAGE) OF SELF-EMPLOYED YOUTH EMPLOYED ACROSS VARIOUS SUB-SECTORS OF TOURISM AND HOSPITALITY

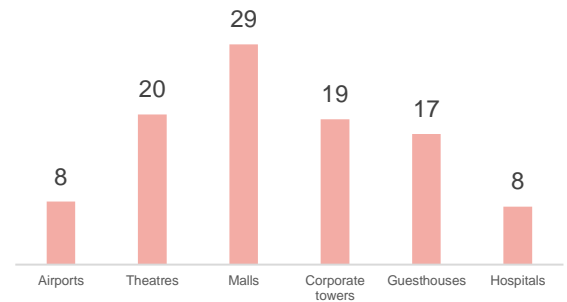
TOURISM AND HOSPITALITY



N = 2,486

Question: Which sub-sector are you employed in the Tourism and Hospitality Industry?

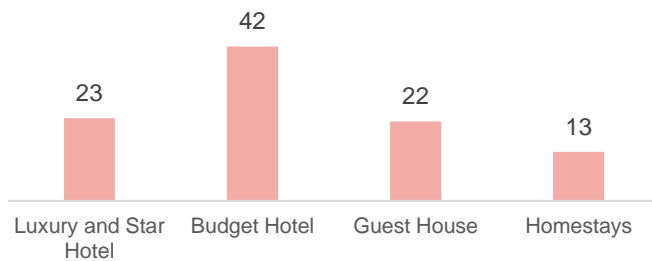
FACILITY MANAGEMENT



N = 755

Question: What is the category of the firm (you are employed with) within the sub-sector of Facilities Management?

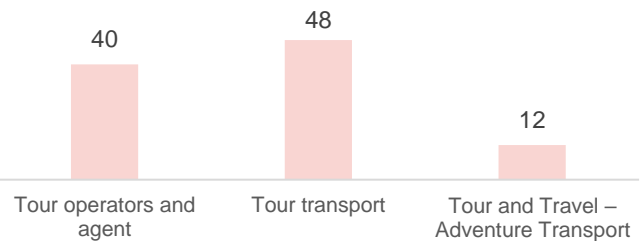
HOTELS



N = 647

Question: What is the category of the firm (you are employed with) within the sub-sector of Hotels?

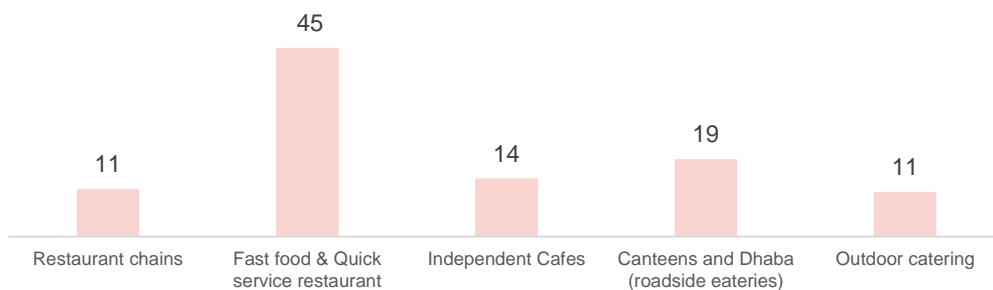
TOURISM AND TRAVELS



N = 459

Question: What is the category of the firm (you are employed with) within the sub-sector of Tourism and Travels?

FOOD SERVICES



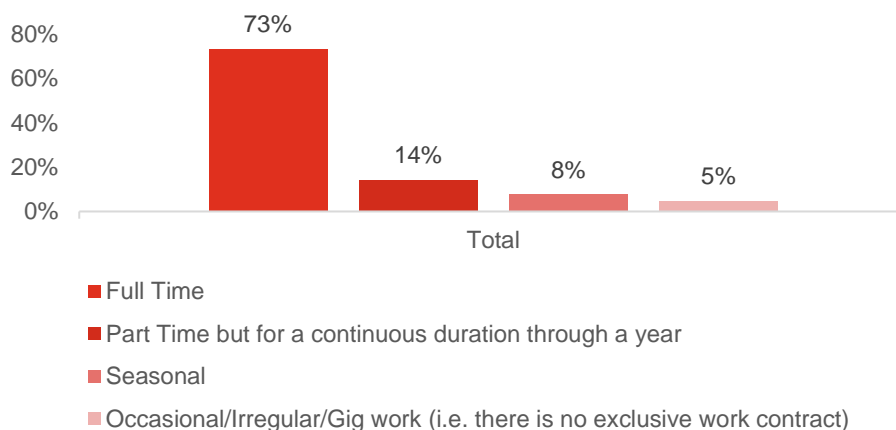
N = 583

Question: What is the category of the firm (you are employed with) within the sub-sector of Food Services?

Nature of Work

We also find that overall, of the 25 percent youth working in self-employed and entrepreneurial ventures, 73 percent were self-employed while only 27 percent were entrepreneurs. We also asked about the nature of work of those involved in self-employment or entrepreneurial ventures. We found that 73 percent of such youth actively participated in full-time self-employment or entrepreneurship, with no significant gender-based variations observed in their pursuit of these endeavors.

FIGURE 21: SHARE (IN PERCENTAGE) OF SELF-EMPLOYED YOUTH PURSUING VARIOUS TYPES OF SELF-EMPLOYED WORK



N = 2486
Question: What is the nature of your work?

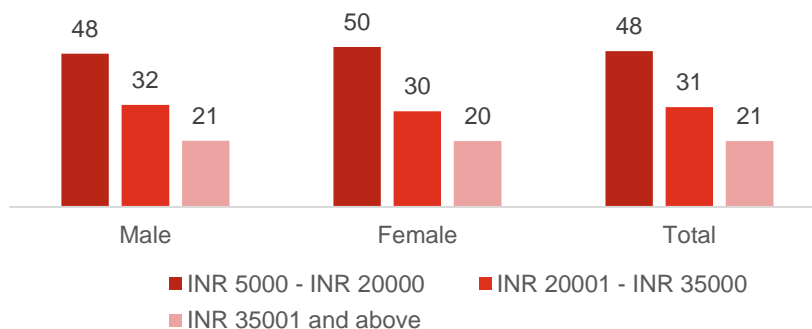
Work Experience and Working Hours

On enquiring about youth's average years of work experience within the sector, we find that on average, workers within this group had 2 years of experience, and their workweek typically spanned 6 days, with an average daily commitment of 9 hours.

Wages Earned

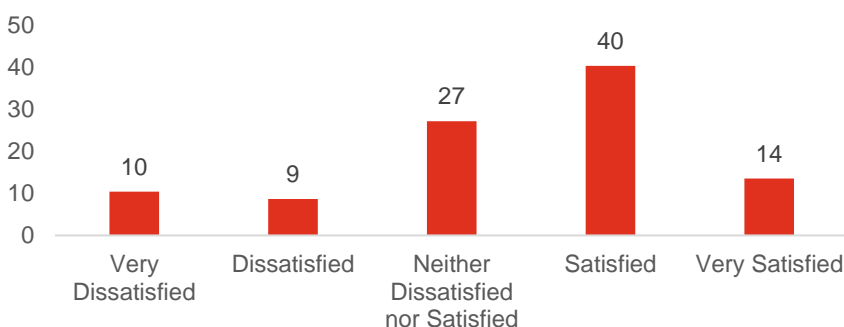
Among self-employed individuals and entrepreneurs, 89 percent youth was willingly disclosed their earnings. Within this group, overall close to half (i.e. 48 percent) reported earning between INR 5000 - 2000, while nearly one-third (i.e. 31 percent) reported earning between INR 20001-35000. There were no gender-based differences in this

FIGURE 22: SHARE OF SELF-EMPLOYED WORKERS EARNING WITHIN CERTAIN MONTHLY WAGE BRACKET, AS PER THE SUB-SECTOR



N = 2231
Question: How much do you earn per month?

FIGURE 23: SHARE (IN PERCENTAGE) OF SELF-EMPLOYED EXPRESSING THEIR SATISFACTION (OR DISSATISFACTION) WITH THEIR JOB



N = 2486
Question: How satisfied are you with the quality and nature of your work?

aspect. To understand the overall job satisfaction among workers, we inquired about their contentment with their work. The findings indicate that 54 percent of the workers expressed satisfaction or high satisfaction with their work, while 19 percent reported dissatisfaction or significant dissatisfaction with their work. Within the subset of individuals expressing dissatisfaction with their work, low earnings (as mentioned by 52 percent of youth expressing their dissatisfaction) emerged as a primary factor contributing to their

discontent. Interestingly, among workers who expressed satisfaction with their work, 46 percent (as expressed by youth expressing their satisfaction) attributed their contentment to earnings. This underscores the pivotal role that earnings play in influencing job satisfaction within the surveyed workers in the tourism and hospitality sector.

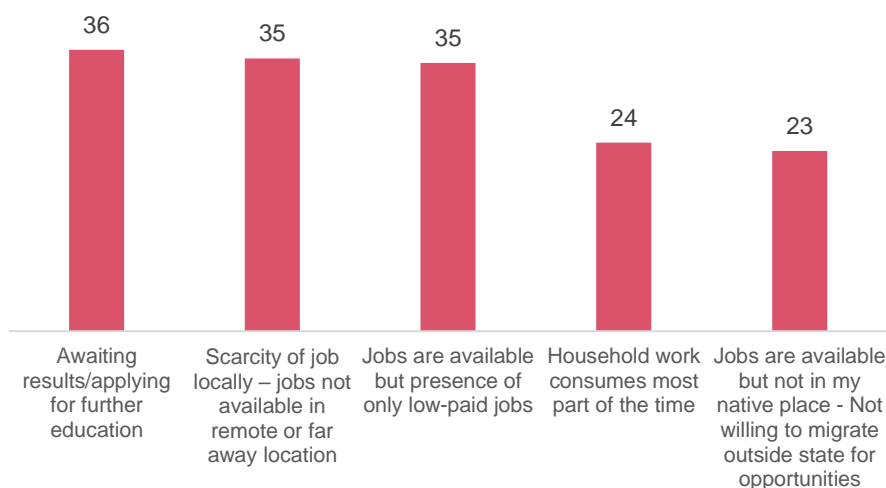
Youth Neither in Education, Employment, or Training (NEET)

Basic Profile

This section provides a brief overview of the work profile of the surveyed youth neither in education, employment or training, constituting 25 percent of the respondents (2,506 individuals). We asked this group of individuals about reasons for being in NEET, their past work experience and their willingness to work.

To assess NEET youth's reasons for being in this category, we found that the primary factor, cited by 36 percent of NEET individuals is awaiting results or applying for further education. Additionally, 35 percent of NEET youth identified the scarcity of locally available jobs and the prevalence of low-paid jobs as the key reasons for their NEET status. There were no significant gender level differences. In our investigation into the duration of NEET status among youth, we discovered that approximately one-third of individuals remained in the NEET category for a period ranging from 6 months to 1 year, while 22 percent had been in this category for 1 to 2 years.

FIGURE 24: SHARE (IN PERCENTAGE) OF NEET YOUTH CITING REASONS TO BE IN NEET



N = 2506

Question: What is the reason for your status of being neither in education nor employed nor training? The responses may not add up to 100% as this was a multiple-choice question.

Prior Work Experience

In our inquiry into the work history of NEET youth, we discovered that only over one-tenth (13 percent) of NEET youth had prior work experience, among which, 47 percent had 2 years of prior work experience.

Willingness to Work and Job Search

During the survey, we found that 61 percent of the NEET youth was willing to work. A gender wise analysis suggests that a larger share of NEET males (67 percent) was willing to work compared to females (55 percent). Among those willing to work, we further inquired about their preference between wage-salaried jobs and self-employment and entrepreneurship. Among the 61 percent of NEET youth willing to work, 91 percent had a clear preference. Within this group of 91 percent, 76 percent were seeking a wage-salaried job, while the remaining 24 percent were interested in self-employment or entrepreneurial work. A gender wise analysis suggests that 79 percent women and 74 percent men were inclined towards wage and salaried jobs.

Among those NEET youth seeking a waged/salaried job, we inquired about their active job search efforts. Our findings indicate that 87 percent of NEET youth seeking a waged/salaried job were actively searching for it. Within this actively job-seeking group, 42 percent had been engaged in the job search for the past 6 months preceding the survey, while 38 percent had been actively looking for a year. A gender-wise analysis reveals 44 percent of males had been actively seeking employment compared to 31 percent of females in the same category. 59 percent of the NEET youth looking for waged and salaried jobs were using local community networks to find job opportunities, while 50 percent were using traditional methods like newspapers and pamphlets, and 42 percent were using online platforms such as Naukri.com.

TABLE 3: SHARE (IN PERCENTAGE) OF NEET YOUTH, ACTIVELY LOOKING FOR A JOB SINCE THE GIVEN TIME PERIOD, GENDER WISE

Duration	Male (in %)	Female (in %)	Total (in %)
Greater than one year	44	31	38
In last year	15	17	16
In last 6 months	37	47	42
In last month	3	4	4
In last week	1	1	1
Total	100	100	100

N = 926

Question: Since how long have you been actively looking for a job?

Lastly, to understand the industry preferences of NEET youth who expressed willingness to work, we inquired about the sectors they were willing to work in. The choice of sectors presented to them were directly related to tourism and hospitality (Electricity/Utility, Wholesale and Retail, Financial Services, IT and Communication (ICT), Education, Real Estate, Administrative services, Food and Beverage). Notably, 47 percent of the NEET youth willing to work, expressed a preference to work within tourism and hospitality sector; wholesale and retail; and electricity. Among those opting for careers in tourism and hospitality, 61 percent selected hotels as their preferred sub-sector, followed by 36 percent choosing food services, 19 percent opting for tourism and travels, 18 percent selecting facility management, and 6 percent choosing cruise liners.

Among the NEET youth willing to work in hotels, the most attractive job roles included Assistant Chef, Barista Executive, and Food and Beverage Service Associate. For those interested in facility management, Billing Executive, Facility Management Executive, and Facility Manager were the most preferred positions. In the tourism and travel segment, Adventure Travel Guide and Customer Service Executive (Meet and Greet) were the top choices. On cruise liners, Assistant Chef and Chef De Partie were the most attractive job roles.

Now that we have established a foundational understanding of the basic profiles of the four categories of youth, the next sub-section delves into youth's career aspirations including a willingness to work in tourism and hospitality sector, awareness of counseling services, awareness of skilling requirements, knowledge about technological advancements, and migration preferences.

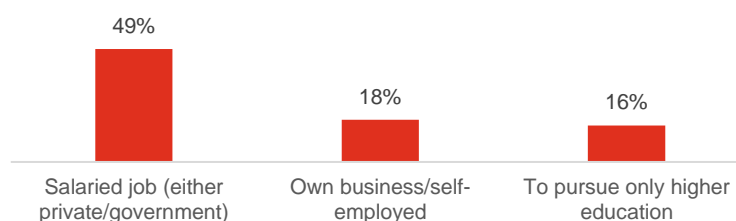
3.2. Career Aspirations of the Youth

Career Aspirations in Next 6 Months

To gain insights into the future career paths of the surveyed youth, we inquired about their career aspirations for the 6 months succeeding the survey. We break down the findings as per the youth category. We found that 49 percent of the students aspired for a salaried job, 18 percent for entrepreneurship or self-employment, and 16 percent

wanted to pursue higher education. On enquiring about the key factors determining the choice of career aspiration, we found that job security (reported by 34 percent of students), growth prospects (34 percent), and decent pay (30 percent) emerged as the primary determinants. Similar findings are reported for NEET youth.

FIGURE 25: SHARE (IN PERCENTAGE) OF STUDENTS CITING THEIR TOP 3 CAREER ASPIRATIONS IN 6 MONTHS SUCCEEDING THE SURVEY



N = 2708

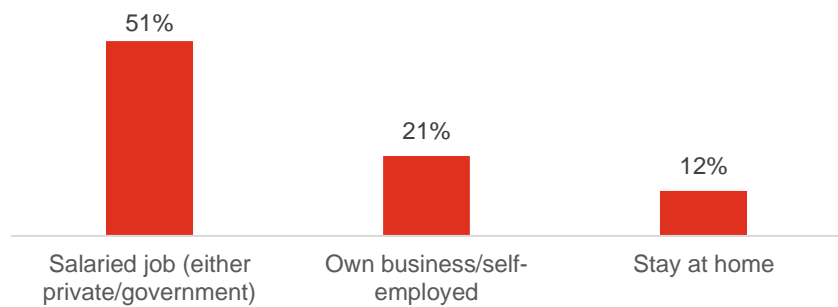
Note: Only top 3 choices for career aspirations are shown

Question: What are your career aspirations in next 6 months?

In contrast to the students and NEET youth, wage and salaried youth exhibited diverse career paths, with 64 percent willing to continue in their current jobs, 24 percent aspired to venture into entrepreneurship, and 5 percent wanted to prepare for government exams. Their choices were influenced by factors such as job security (33 percent), growth prospects (32 percent), and decent pay (30 percent).

Among the self-employed youth, 55 percent expressed a desire to continue their own businesses, 36 percent wanted to secure a job, and 5 percent preferred staying at home in the next six months. The primary factors influencing these choices included growth prospects (36 percent), location

FIGURE 26: SHARE (IN PERCENTAGE) OF NEET YOUTH CITING THEIR TOP 3 CAREER ASPIRATIONS IN NEXT 6 MONTHS SUCCEEDING THE SURVEY

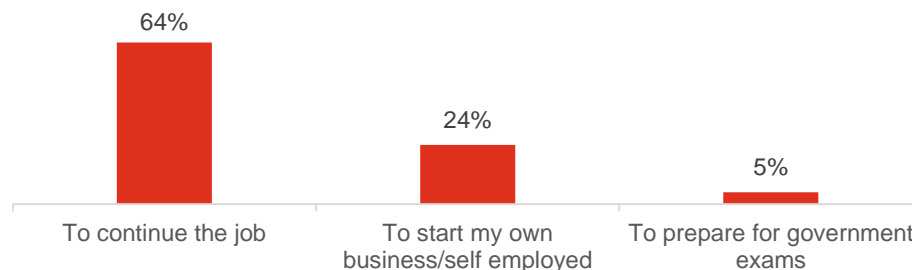


N = 2506

Note: Only top 3 choices for career aspirations are shown

Question: What are your career aspirations in next 6 months?

FIGURE 27: SHARE (IN PERCENTAGE) OF WAGE AND SALARIED YOUTH CITING THEIR TOP 3 CAREER ASPIRATIONS IN THE NEXT 6 MONTHS SUCCEEDING THE SURVEY



N = 2458

Note: Only top 3 choices for career aspirations are shown

Question: What are your career aspirations in next 6 months?

proximity (31 percent), and opportunities for continuous learning and upskilling (27 percent).

Willingness to Join Tourism and Hospitality Sector

Upon further inquiry regarding willingness of youth to work in tourism and hospitality sector in particular, we found that within the group of 49 percent of youth not

currently engaged in jobs (i.e., students or NEET youth) in tourism and hospitality, 53 percent expressed a willingness to work in the sector. Conversely, among the 51 percent of youth already employed (i.e., wage and salaried or self-employed youth) in the industry, 59 percent express their intention to continue working in the same sector.

When exploring the reasons for choosing or not choosing to join the tourism and hospitality sector, those willing to join are primarily motivated by personal interest (67 percent), alignment with educational qualifications (48 percent), and a desire for a diverse and dynamic environment (32 percent). On the other hand, individuals not willing to join cited a preference for a different career path (49 percent), a lack of alignment with educational qualifications (44 percent), a preference for more office-based work (23 percent), and concerns about the seasonal nature of jobs within the sector (noted by certain individuals at 23 percent) as deterrents.

In line with youth's aspiration to pursue self-employment or entrepreneurship, our qualitative interactions with educational institutions suggest that professors from Ambedkar University, New Delhi, believe that the future of the tourism industry envisions a shift towards fostering self-employment. In response, there are strategic plans within Ambedkar University to establish an incubation center and also world skills center aimed at nurturing and cultivating a new generation of entrepreneurs. A notable example is the Atal Incubation Centre within the university, where students have already taken the initiative to start their own travel agencies. Additionally, some universities extend financial support to entrepreneurial ventures, for example, some universities have introduced a pilot project to help students establish their own entrepreneurial venture in food services where students can explore, ideate, and run a food services business.

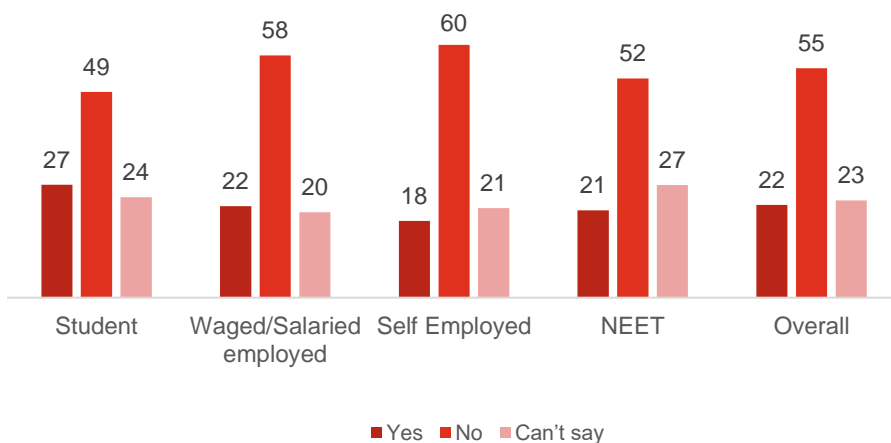
We further found that recognizing the demand for entrepreneurship in the industry, some universities have taken initiatives such as establishment of an Entrepreneurship Club. This club facilitates industry engagement through guest lectures, promotes hands-on experiences by establishing a catering facility and organizes various activities to bridge

the gap between academia and the industry within the food and beverage service sector. Principal from the Institute of Hotel Management (IHM) Ahmedabad stated that entrepreneurial pursuits are actively promoted in their institute through dedicated courses. The institute had established an entrepreneurship club five years ago, resulting in students starting their own canteen within the institute. This initiative expanded into several stalls, where students were responsible for food production and marketing.

Willingness to Join Gig Work

We further tried to understand the youth's willingness to participate in the gig economy. The results indicate that an overall 22 percent of the youth express interest in pursuing gig work, with students displaying the highest interest at 27 percent, followed by wage and salaried workers at 22 percent. A regional breakdown reveals that 24 percent of the rural youth was interested in pursuing gig work, compared to 22 percent urban youth and 19 percent youth from semi-urban regions.

FIGURE 28: SHARE OF YOUTH INTERESTED IN PURSUING OPPORTUNITIES AS A GIG WORKER



N = 10,158

Question: Are you interested in pursuing opportunities as a Gig Worker (Uber / Ola / Zomato / Swiggy – short term contract-based job)?

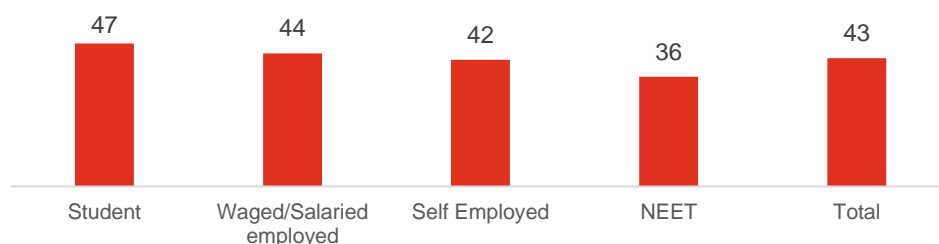
We also delved into the reasons motivating youth to opt for gig work. The findings suggest that of the 22 percent youth willing to join gig work, 53 percent highlighted the appeal of low entry barriers in terms of required skills and educational qualifications, 47 percent cited a lack of alternative employment opportunities as a contributing factor, and 36 percent were motivated by the prospect of earning a higher supplemental income in the gig economy.

Furthermore, our investigation tried to understand the factors that deter youth from considering gig work within the tourism and hospitality sector. Among the 55 percent expressing disinterest in gig work, key reasons cited for not choosing gig work included a perceived lack of structure in the nature of the work (42 percent), concerns about the absence of clear career progression opportunities (41 percent), and apprehensions about variable salary structures (40 percent). Our analysis found that there are no significant differences in reasons to not pursue gig work across urban and rural areas, gender, and various youth categories.

3.3. Awareness About Career Counselling Services

After gaining insights into youth's career aspirations, understanding their awareness of career counseling services is crucial to assess their ability to seek guidance to fulfill their career aspirations. We therefore inquired the youth about their awareness of career

FIGURE 29: SHARE (IN PERCENTAGE) OF YOUTH AWARE ABOUT CAREER COUNSELLING SERVICES



N = 10,158

Question: Are you aware about career counselling services in your native area?

counselling services in their neighborhood and found that overall, less than half of the youth (43 percent) were aware of available career counseling services. A youth category wise analysis suggests that only 36 percent of the NEET

youth exhibited awareness, compared to 47 percent of students. No significant differences were observed across gender and rural and urban categories.

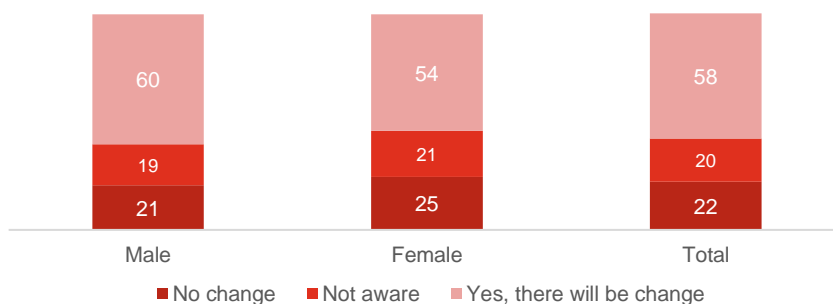
We further inquired the youth who are aware of career counselling services and whether they utilized the services or not. Among the 43 percent of youth who were aware of career counseling services, 65 percent utilized these services, with no significant differences across different categories of youth. Among the 65 percent of youth utilizing career counseling services, when asked about the types of services provided by the service providers, they identified information on relevant vacancies (57 percent), advice on starting one's own business (48 percent), and guidance in job applications, including resume building and cover letter writing (47 percent) as the key services offered by their nearby career counseling services.

Among the 35 percent of youth who were aware of counseling services, only 20 percent expressed a desire to do so. Their primary reasons for wanting to utilize these services included seeking information on relevant vacancies (54 percent), advice on starting their own business (47 percent), and guidance in job applications, including resume building and cover letter writing (46 percent).

3.4. Awareness About Technological Advancements

As mentioned in Chapter 2, the tourism and hospitality sector is undergoing significant changes, emphasizing the importance of assessing youth awareness regarding technological advancements in the industry. We inquired whether the youth anticipate any changes in employment or skilling attributed to technological advancements in the sector. The findings revealed that more than half of the surveyed youth (58 percent) was aware of anticipated technological changes in employment or skilling within the tourism and hospitality sector.

FIGURE 30: SHARE OF YOUTH (IN PERCENTAGE) ANTICIPATE CHANGE EITHER IN SKILLING OR EMPLOYMENT DUE TO TECHNOLOGICAL ADVANCEMENT



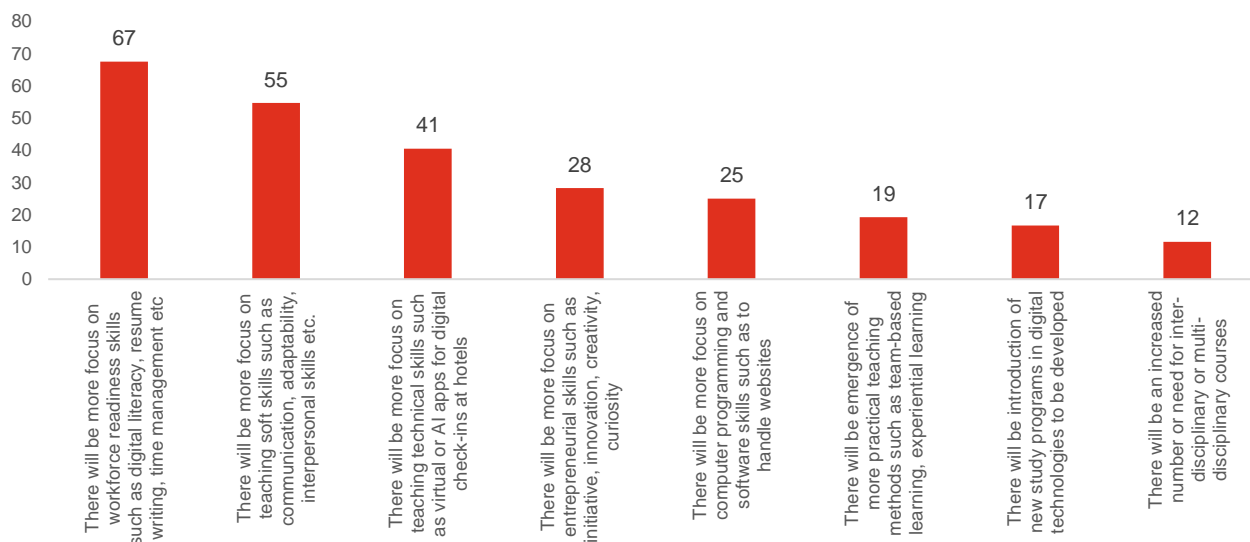
N = 10,158

Question: In general, do you anticipate any change in employment and/or skilling due to technological advancements?

There were gender differences, with fewer females (54 percent females compared to 60 percent males) who anticipated a change in skilling or employment due to technological advancements. However, no significant differences were observed across various youth categories.

Among the 58 percent youth anticipating changes, 37 percent believed there will be a change in skilling requirements, 26 percent perceived a change in employment prospects, and 37 percent believed there will be changes in both skilling and employment. Of those who anticipated changes in skilling or both in skilling and employment, we inquired about the specific changes they expect in skilling development and teaching due to technological advancement. 67 percent of such group of respondents expected a heightened focus on workforce readiness skills such as digital literacy and resume writing, while 55 percent anticipated an emphasis on soft skills in teaching curriculum. Furthermore, 41 percent foresaw increased attention to technical skills and 28 percent expected a focus on entrepreneurial skills. Computer programming and software skills were anticipated by 25 percent of the respondents. Additionally, practical teaching methods (19 percent) and new study programs in digital technologies (17 percent) were expected to emerge.

FIGURE 31: SHARE OF YOUTH (IN PERCENTAGE) ANTICIPATE ANY CHANGE IN SKILLING DEVELOPMENT AND TEACHING IN RESPONSE TO TECHNOLOGICAL ADVANCEMENTS



N = 4,306

Question: According to you, in general what kind of changes in approach to skill development and teaching will happen in response technological advancements?

The responses may not add up to 100% as this was a multiple-choice question.

Similarly, we asked those who anticipate changes in employment or both in skilling and employment, and the specific changes they expect in general employment and their own employment prospects due to technological advancement. We found that within 57 percent of the group anticipating changes in employment or both in skilling and employment, 34 percent of youth believed there will be an emergence of more job opportunities across sectors, 31 percent believed there will be an elimination of some job opportunities across sectors, and 30 percent believed there would be elimination or redefinition of existing jobs, but also the creation of new jobs. We further inquired the youth about how they perceived their own skilling or employment prospects to change in response to technological advancements. We found that 57 percent of the group anticipating changes in employment or both in skilling and employment stated that they will have more and better methods of exchange and connectivity with colleagues, 54 percent anticipated more job opportunities to work remotely, such as working with customers virtually, and 39 percent anticipated fewer job opportunities, as most of the jobs will be displaced by machines and robots.

Complementing our quantitative findings, qualitative interactions with educational institutions provided useful insights regarding how the institutes are aware of preparing young students towards emerging trends in the tourism and hospitality industry. Manipal University's Principal highlighted the university's proactive approach to the evolving hospitality and tourism industry. In response to technological advancements, the university has introduced hands-on courses, combining structured classroom learning with practical experiences, for instance, practical skills are honed through the operation of a commercial restaurant, providing valuable insights into menu planning, digital marketing, team building and event management.

Further, Christ University's Principal mentioned that the program at their university places a strong emphasis on experiential learning, actively engaging students in restaurant operations and entrepreneurial cafes. The university acknowledges the distinctive entrepreneurial role that chefs will assume in the ever-evolving hospitality landscape and therefore prioritizes the development of both technological skills, including data analysis and software proficiency and essential social skills, such as adaptability.

GD Goenka University too incorporates training in presentation skills, operates a communication lab, and engages in video blogging in both French and English within its curriculum. It conducts various public speaking exercises and provides learner-based assignments for different levels, including slow learners, intermediate learners, and active learners. In an interaction with the principal of IHM Pusa, we learned that the institute emphasizes cultivating a mindset of product design and problem-solving among students. This encouragement leads them to devise solutions, such as

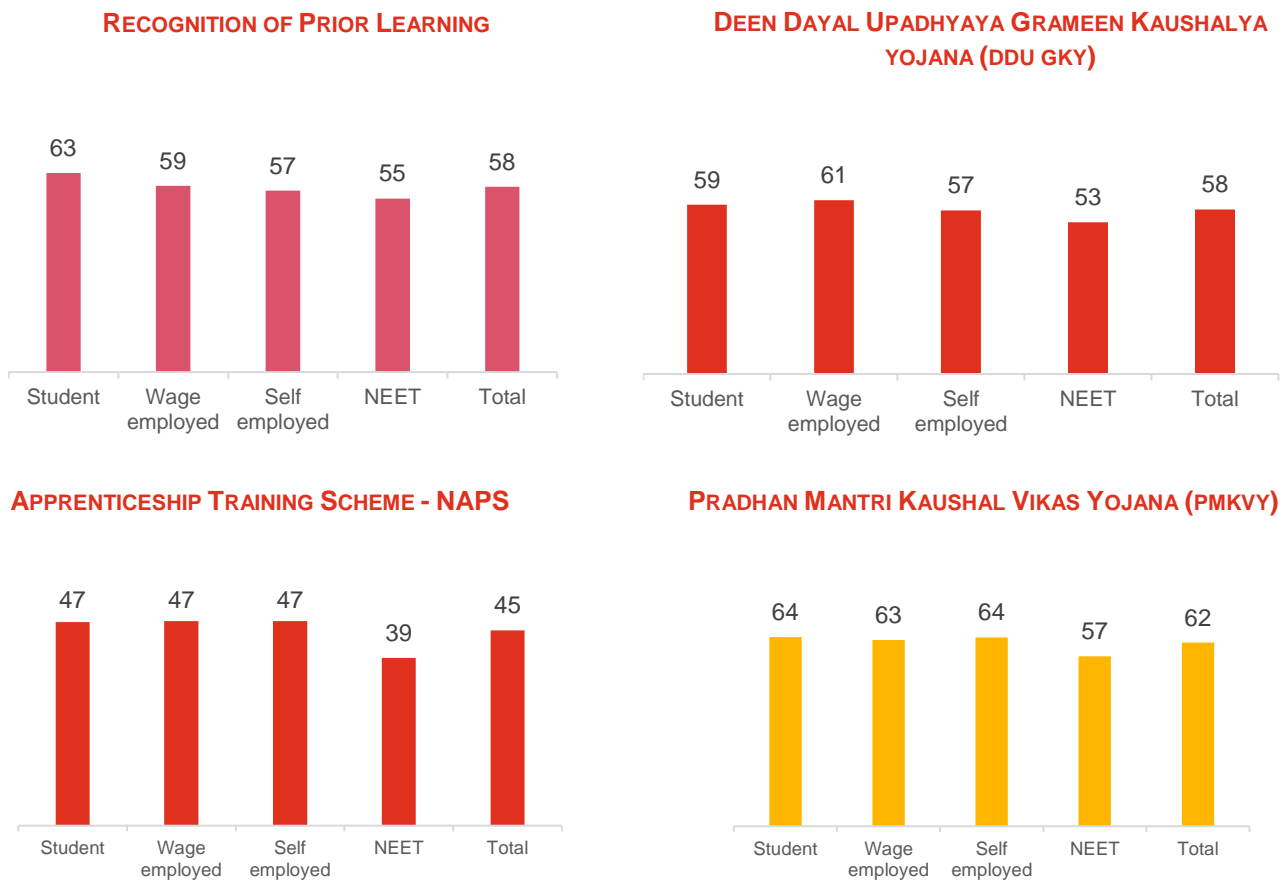
extending the shelf life of refrigerated items. Some educational institutions have also set up research and development labs to support students in applying their theoretical knowledge to learning and innovative thinking skills. According to the Assistant Director of Skill Development at Starex University, their Bachelor of Skills course prioritizes advanced skills. It adopts a modern approach through app-based induction, which includes a diverse range of practical recipes, featuring a curated selection of 100 dishes.

3.5. Awareness About Skilling Requirements

In view of changing skilling requirements, we further assessed youth’s awareness regarding skilling schemes in India: Recognition of Prior Learning (RPL), Deen Dayal Upadhyaya Grameen Kaushalya Yojana (DDU-GKY /Sagarmala, Pradhan Mantri Kaushal Vikas Yojana (PMKVY), Craftsmen Training Schemes, National Apprenticeship Promotion Scheme (NAPS), Rural Self-Employment Training Institute (RSETI), and Kaushal Vardhan Kendra (KVK) 2.0.

We found that while over 50 percent of the youth was aware about schemes such as RPL, DDU-GKY, PMKVY, slightly less than half of the youth was aware about CTS (45 percent), NAPS (45 percent), RSETI (50 percent). Youth-wise findings highlight varying awareness levels. For instance, a larger share of students (i.e., 63 percent) in education were aware about RPL scheme, followed by wage-employed individuals (59 percent), self-employed (57 percent) and NEET individuals (55 percent). This pattern is consistent across schemes like DDU-GKY and PMKVY. The overall awareness of the CTS scheme stands at 47 percent, with NEET’s awareness lower at 42 percent. Similar patterns are observed for other schemes, including the NAPS, RSETI and KVK 2.0.

FIGURE 32: SHARE (IN PERCENTAGE) OF YOUTH BEING AWARE OF MAJOR SKILL DEVELOPMENT SCHEMES IN INDIA



N = 10,158

Question: Are you aware about the mentioned schemes/councils/policies?

Understanding about Relevant Skills for Employment

We further inquired about the skills which the youth considers most important to attain a job or work, to understand the awareness of youth regarding crucial skills valued by employers. 56 percent of the youth identified written and verbal communication as the most essential skill for employment, followed by complex problem-solving skills (such as client handling, grievance redressal), cited by 50 percent, critical thinking at 48 percent, adaptive learning at 47 percent, and literacy/numeracy skills at 47 percent. There were no significant differences across different youth categories and gender groups.

We further assessed whether the youth deemed it necessary to undergo training

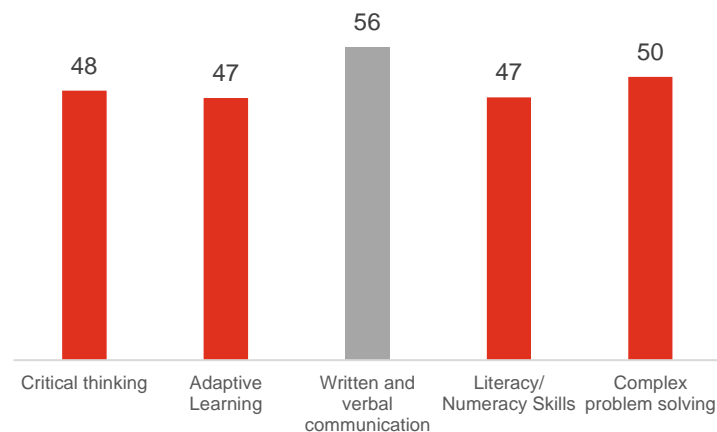
in these skills. Among those who identified written and verbal communication as crucial for employment (56 percent), 75 percent expressed a willingness to receive training in the skill. Likewise, for those recognizing complex problem-solving as vital (50 percent), 74 percent showed readiness for training in this skill. Interestingly, critical thinking emerged as the most sought-after skill for training among the youth. We additionally observe that educational institutions acknowledge the significance of the skills identified by youth.

Willingness for Skill Development Training in Tourism and Hospitality Industry

While understanding the youth's perspective on the crucial skills for their training is important, it is equally essential to assess their interest in acquiring skill development within the tourism and hospitality sector. Therefore, we asked the youth about their willingness to undergo training within tourism and hospitality industry. Our findings indicate that slightly less than half of the surveyed youth (44 percent) expressed a willingness to receive training in the tourism and hospitality sector. An analysis across youth shows that 48 percent students exhibited inclination for skill development in tourism and hospitality sector, compared to 44 percent wage employed, or 41 percent self employed or each NEET youth.

Moreover, among the 44 percent of youth who expressed their willingness for skill development training within the tourism and hospitality sector, we inquired about the preferred type of skill development course, whether they preferred part-time or full-time training, and whether residential or non-residential programs were more appealing. The results reveal that among the 44 percent of youth willing for skill development training within the tourism and hospitality sector, 49 percent favored short-term courses (i.e., less than 6 months), 41 percent expressed interest in entrepreneurship and self-employment-related courses, while 31 percent leaned towards long-term training programs (6 months to 1 year duration).

FIGURE 33: SHARE (IN PERCENTAGE) OF YOUTH CITING TOP 5 RELEVANT SKILLS FOR A JOB



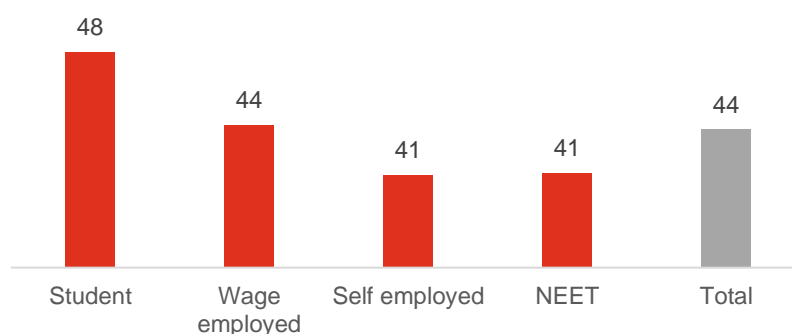
N = 10,158

Note: Only top 5 choices are shown

Question: According to you, which 5 skills are most relevant for a job/work?

The responses may not add upto 100% as this was a multiple-choice question.

FIGURE 34: SHARE OF YOUTH (IN PERCENTAGE) INTERESTED IN SKILL DEVELOPMENT TRAINING IN TOURISM AND HOSPITALITY SECTOR



N = 10,158

Note: Only top 5 choices are shown

Question: Are you interested in a skill development training in the sector of tourism and hospitality?

FIGURE 35: SHARE (IN PERCENTAGE) OF YOUTH CITING FOR PART-TIME OR FULL-TIME TRAINING



N = 4423

Question: Would you be interested in a part-time or full-time skill training?

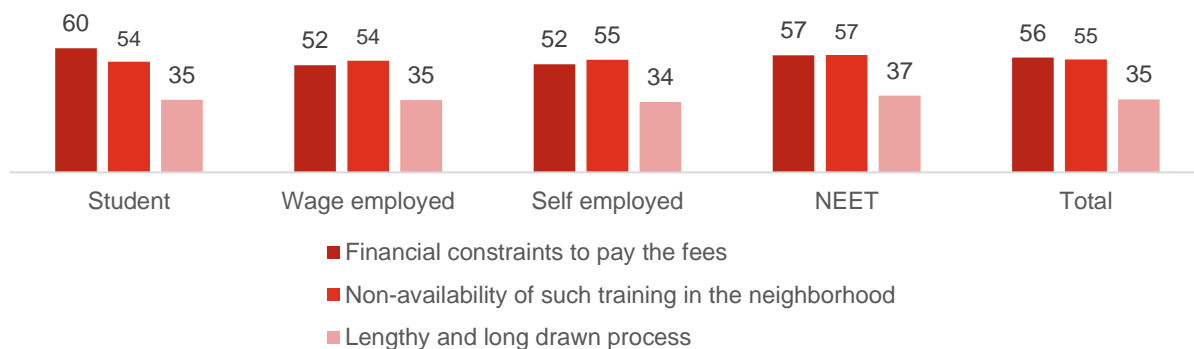
part-time training (60 percent, 55 percent, and 57 percent respectively).

We also inquired about the preference for residential versus non-residential training and found that 86 percent of the youth (who are willing to be trained in skill development for tourism and hospitality sector) expressed a clear preference. Within this group of 86 percent, 60 percent favored residential training, while 40 percent preferred non-residential training. There were no significant differences observed across gender or youth categories.

Furthermore, to understand the willingness of youth to financially contribute to training programs in the tourism and hospitality sector, we asked whether they are prepared to pay for such training and, if so, the minimum amount they would be willing to invest. The findings indicate that only 38 percent (of the 44 percent of youth eager for skill development training within the tourism and hospitality sector) were willing to pay for the training. Among different sub-categories, NEET individuals showed the least inclination to pay (31 percent), while students, wage-employed individuals (40 percent each) and self-employed individuals (38 percent) expressed varying levels of willingness. Students mentioned that they were willing to pay INR 8000, while those working in jobs or were self-employed that they were willing to pay INR 5000 for the training programmes.

Lastly, we also questioned the youth regarding potential challenges in their readiness to undergo training programs within the tourism and hospitality sector. Financial constraints emerge as the primary concern, as reported by 55 percent (of the 44 percent of expressing willingness to undergo training in the tourism and hospitality industry) youth. A closer examination across categories reveals that 60 percent of the identify the potential for financial constraints. Additionally, we identified a perception among the youth that the training process is lengthy, with 35 percent expressing this concern. This issue is particularly prominent among self-employed and NEET individuals, with 37 percent highlighting this challenge.

FIGURE 36: SHARE OF YOUTH (IN PERCENTAGE) CITING THEIR CHALLENGES THAT MAY STOP THEM FROM UNDERGOING TRAINING PROGRAMME IN TOURISM AND HOSPITALITY SECTOR



N = 4423

Note: Only top 3 responses are shown

Question: What are the major challenges/constraints that would stop you from undergoing training programme?

Regarding the nature of training, the findings indicate that a slightly larger proportion of youth (55 percent) preferred part-time training, compared to the 45 percent who favor full-time training. An analysis based on youth categories revealed that students exhibited a near-indifference between full-time (49 percent) and part-time (51 percent) training, given their flexibility due to ongoing studies. However, individuals in self-employment, wage employment, and those categorized as NEET showed a distinct preference for

3.6. Migration Preferences

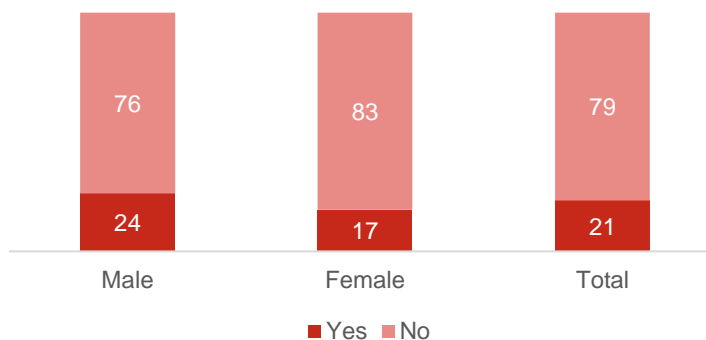
We also tried to understand whether the surveyed youth was willing to migrate out of their native place in search of employment. We found that only 21 percent of the youth was willing to migrate. A relatively larger share of males (24 percent) was willing to migrate than females (17 percent).

Of the 21 percent willing to migrate, 56 percent were willing to migrate outside their native district but within the same state that they reside in, 44 percent wanted to migrate outside the state they reside in but within India, and only 10 percent wanted to migrate out of India.

For those 56 percent who were willing to migrate outside their native district but within the same state, migration preferences revealed distinct geographical trends, with certain states and districts standing out as top choices. We also tried to understand the top 5 states from where the youth is willing to migrate from. We find that 53 percent youth from Bihar is willing to migrate out of their native place, 43 percent from Uttarakhand, 40 percent from Himachal Pradesh, 40 percent from Assam, and 39 percent from Karnataka.

Of those 21 percent of youth willing to migrate, the pursuit of improved job and business opportunities (24 percent), strong connection to their family and native community (23 percent), and the desire for economic advancement motivates individuals to seek regions aligning with their career goals.

FIGURE 37: SHARE (IN PERCENTAGE) OF YOUTH WILLING TO MIGRATE OUTSIDE OF NATIVE PLACE, BY GENDER



N = 10,158

Question: Are you willing to migrate out of their native place for work?

4. Industry's Perspective

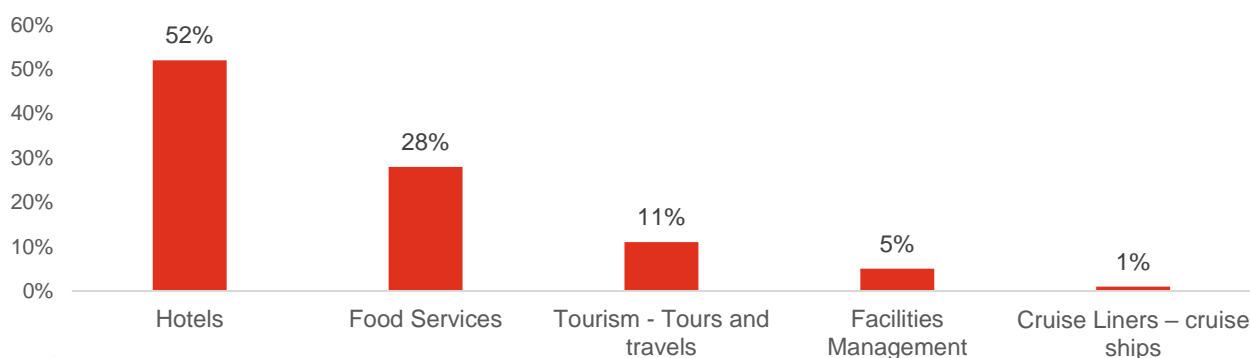
To gain insights into the workforce engaged in the tourism and hospitality industry, we conducted a primary survey with employers to capture their perspectives. Our focus was on understanding employers viewpoints regarding recruitment practices, required educational qualifications, desired skill sets, training methods within their organizations, job roles for entry-level workers, wages and wage premiums, and the perceived influence of technology on employment and skill development in the industry. This chapter presents the key findings and perspectives that emerged from surveying 553 employers across five sub-sectors of the tourism and hospitality industry, namely – Hotels, Food Services, Facilities Management, Tourism - Tour and Travel and Cruise-Liners. The quantitative questionnaire utilized for the employers' surveys is placed in Annexure E, and the list of stakeholders interviewed for qualitative discussions is provided in Annexure B.

4.1. Profiling of the Surveyed Employers

Basic Profile of Respondents

The study encompassed interviews with 553 employers across five sub-sectors of tourism and hospitality industry in 20 states and 6 Union Territories of India. The state wise coverage of sample is presented in the Annexure A. Out of the five sub-sectors, Hotels represented the majority, constituting 52 percent of the total sample. Other sub-sectors included Food Services (28 percent), Tourism – Tours and Travels (11 percent), Facilities Management (5 percent), and Cruise Liners (1 percent).

FIGURE 38: SHARE (IN PERCENTAGE) OF EMPLOYERS SURVEYED FROM VARIOUS SUB-SECTORS



N = 553

Question: What is the type of sub-sector the employer/the firm operates in?

Employers surveyed consisted of 41 percent from the organized firms and the remaining (59 percent) from the unorganized firms. Within the Hotels sub-sector, the distribution of employers surveyed was equal, i.e., 50 percent of employers each across the organized and unorganized firms respectively. In the Cruise Liners- Cruise Ships sub-sector, except for one employer, all the surveyed employers belonged to organized firms. In the other three sub-sectors, i.e., Food Services, Facilities Management, and Tourism- Tour and Travels, the share of surveyed employers belonging to unorganized establishments outnumbered the employers from organized establishments. Specifically in the Food Services sub-sector, 72 percent were unorganized firms' employers and 28 percent were organized firms' employers. In the Facilities Management sub-sector, 57 percent were unorganized firms' employers and 43 percent were organized firms' employers and, in the Tourism – Tours and Travel sub-sector, 69 percent were unorganized firms' employers and 31 percent were organized firms' employers.

TABLE 4: SHARE (IN PERCENTAGE) AND NUMBER OF EMPLOYERS ACROSS SUB-SECTORS CATEGORIZED ACROSS THE TYPE OF EMPLOYER'S FIRM

Sub-Sectors	Type of organization to which employers belonged			
	Organized		Unorganized	
	Number of employers	Share (percentage)	Number of employers	Share (percentage)
Hotels (N=289)	144	50	145	50
Food Services (N=155)	43	28	112	72
Facilities Management (N=42)	18	43	24	57
Tourism – Tour and travel (N=62)	19	31	43	69
Cruise Liners – cruise ships (N=5)	4	80	1	20

The study delved into various categories of firms within each sub-sector. In the hotels sub-sector, majority were from budget hotels (57 percent), followed by luxury and star hotels (27 percent), homestays (12 percent) and guest houses (5 percent). In the Food Services sub-sector, coverage included independent cafes (38 percent), fast foods and quick service restaurants (30 percent), restaurant chains (14 percent), canteens and dhabas (12 percent), and outdoor catering (6 percent). The employers within Facilities Management sub-sector consisted of various categories of hospitality-related services in malls (17 percent), theatres (12 percent), guesthouses (10 percent), corporate towers (48 percent), and hospitals (5 percent). In the Tourism – Tours and Travels sub-sectors, the survey covered three categories: Tour operators and agents (31 percent), Tour transport (42 percent) and Tour and Travel – Adventure Transport (24 percent).

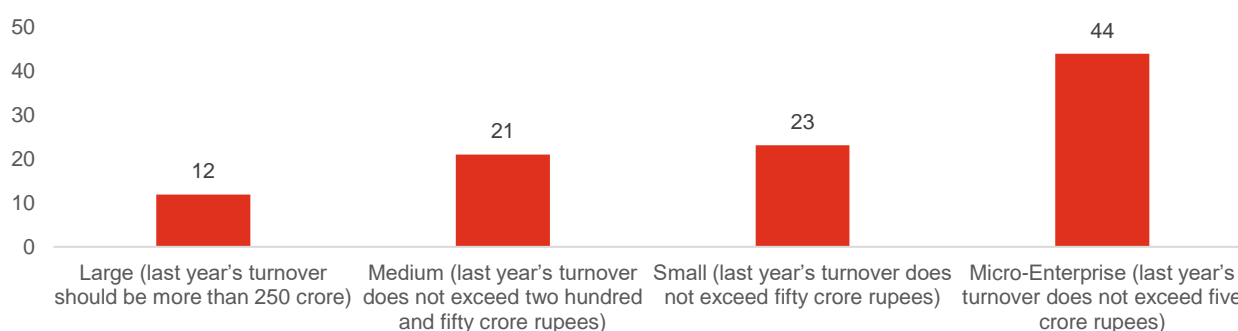
TABLE 5: CATEGORIES OF FIRMS (IN NUMBERS AND PERCENTAGE) COVERED UNDER VARIOUS SUB-SECTORS OF TOURISM AND HOSPITALITY

Category of firm within sub-sector	Organized and Unorganized				Total	
	Organized		Unorganized		Number of employers	Share (in %)
	Number of employers	Share (in %)	Number of employers	Share (in %)		
Hotels						
Luxury and Star Hotel	75	52	2	1	77	27
Budget Hotel	65	45	99	68	164	57
Guest House	2	1	12	8	14	5
Homestays	2	1	32	22	34	12
Food Services						
Restaurant chains	20	47	2	2	22	14
Fast food and Quick service restaurant	14	33	32	29	46	30
Independent Cafes	6	14	53	47	59	38
Canteens and Dhabas (roadside eateries)	3	7	16	14	19	12
Outdoor catering	0	0	9	8	9	6
Facilities Management						
Hospitality related services at theatres	1	6	4	17	5	12
Hospitality related services at malls	0	0	7	29	7	17
Hospitality related services at corporate towers	11	61	9	38	20	48
Hospitality related services at guesthouses	2	11	2	8	4	10
Hospitality related services at hospitals	1	6	1	4	2	5
Tourism - Tours and Travels						
Tour operators and agent	8	42	11	26	19	31
Tour transport	8	42	18	42	26	42
Tour and Travel – Adventure Transport	3	16	12	28	15	24

Furthermore, 40 percent employers interviewed were owners and founders of their organizations and the remaining (60 percent) employers were HR heads in the surveyed organizations. Geographically, out of the surveyed employers, 30 percent were from the regions of Gujarat, Madhya Pradesh, Maharashtra, Rajasthan, and Uttar Pradesh. The

study involved employers across diverse industries and sizes. Micro-scale enterprises formed the majority at 44 percent, followed by small-scale (23 percent), medium-scale (21 percent), and large-sized enterprises (12 percent).

FIGURE 39: SHARE (IN PERCENTAGE) OF EMPLOYERS SURVEYED ON THE BASIS OF THEIR FIRM-SIZE



N = 553

Question: How would you describe the size or scale of the organization you work for or are affiliated with?

Workforce Details

To understand the workforce details of the surveyed employers, we inquired with the employers on the share of entry-level workers, manager and mid-level workers, female workers, migrant workers, permanent workers, and contractual workers, as well as the future expected growth of workers in the next 12 months.

Across the firms surveyed, on an average, 36 percent were entry level workers. Mid-level workers formed 15 percent of the workforce, while the remaining were top-level workers. In terms of gender decomposition, the total workforce of the employers constituted 69 percent male workers and 31 percent female workers. Further, within the firms surveyed, on an average, 63 percent were permanent workers, while the rest were contractual, as reported by the employers interviewed. To understand the requirement for workers in the next 12 months, we asked the employers the estimated number of new workers to be recruited in the next 12 months. Our findings indicated that, on average, employers of all firm sizes expected a 25 percent increase in the number of workers within the next 12 months. Notably, micro-enterprise employers anticipated a slightly higher growth rate, projecting a 29 percent increase in average hiring over the same time frame.

Migrants' Share in the Workforce

A significant focus in our primary survey with employers was to know the number of migrant workers they hire in their respective organizations, and from which states, districts, etc. Out of the 553 employers overall sample, 159 employers or 29 percent employers confirmed of hiring migrant workers. When evaluating the employer affiliations based on firm sizes, it is observed that among the 228 surveyed employers from organized firms, 32 percent reported hiring migrant workers, surpassing the 27 percent reported by the employers surveyed from unorganized firms. While from the enterprise sizes perspective, 43 percent employers from medium-sized enterprises reported hiring migrant workers followed by 35 percent employers from each of large-sized and small-sized enterprises. The analysis of trends of hiring migrant workers sub-sectors indicates that the Facilities Management and Hotels sectors are the primary hirers of migrant workers. Specifically, 38 percent of employers in the Facilities Management sub-sector and 34 percent in the Hotels sub-sector reported to hiring migrant workers. The least hiring of migrant workers was noted by employers from the food services sector, with only 18 percent of the employers reported hiring migrant workers from this sub-sector.

We further inquired with the employers on the state-wise trends vis-à-vis hiring of migrant workers. The top five states from which most hiring was noted include Bihar, Uttar Pradesh, Maharashtra, Delhi, Gujarat and Madhya Pradesh with 40 percent, 25 percent, 19 percent, 13 percent, 13 percent, 11 percent, respectively as reported by the surveyed employers. The sub-sector level analysis on the top states and UTs for hiring revealed that majority of employers surveyed, recruit from Bihar, followed by Uttar Pradesh, Delhi and Maharashtra.

TABLE 6: TOP 5 STATES/UTS WITH THE HIGHEST NUMBER OF MIGRANT WORKERS RECRUITED AS CITED BY SHARE (IN PERCENTAGE) OF EMPLOYERS

Sub-sector	States/UTs with the highest number of migrant workers recruited
Hotels	Bihar, Uttar Pradesh, Delhi, Gujarat, Maharashtra
Food Services	Bihar, Madhya Pradesh, Himachal Pradesh, Andhra Pradesh, Gujarat
Facilities Management	Bihar, Uttar Pradesh, Delhi, Maharashtra, Gujarat
Tourism – Tour and travel	Bihar, Uttar Pradesh, Assam, Andhra Pradesh, Andaman and Nicobar Islands
Cruise Liners – Cruise Ships	Delhi and Maharashtra
Overall (All sub-sectors)	Bihar, Uttar Pradesh, Maharashtra, Delhi, Gujarat, and Madhya Pradesh

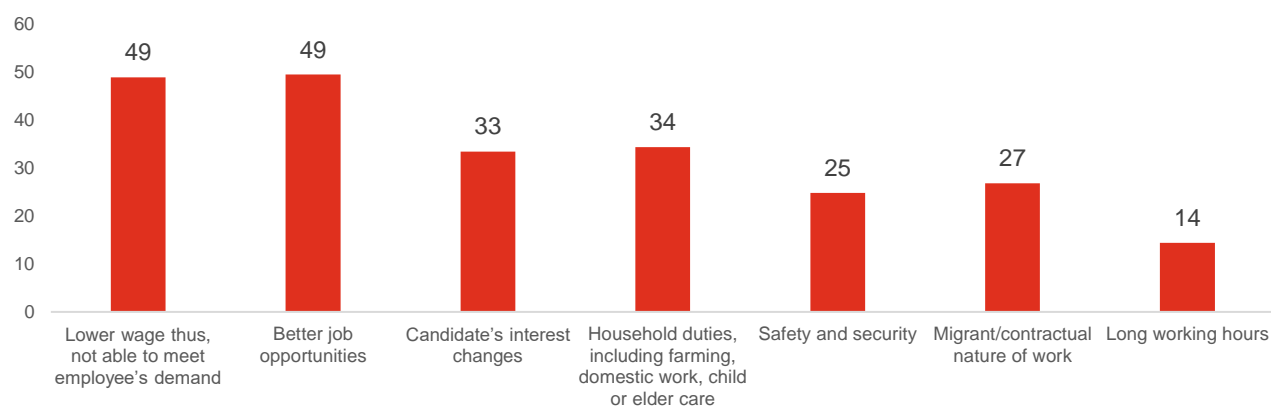
N=553 for total; N=289 for hotels, N=155 for Food Services; N=42 for Facilities Management and N=62 for Tours and Travels; N=5 for cruise liners; Note: Only top 5 choices are shown

Question: From which state or union territory majority of workers come from in your company?

Attrition Rate

We inquired with the employers on the average attrition rate and labour turnover rate in their organization in the last year FY22-23. The average attrition rate as reported was 21 percent. The attrition rate in the organized sector of the tourism and hospitality industry was slightly higher at 22 percent, compared to 20 percent in the unorganized sector. As per the employers, a high attrition rate in the tourism and hospitality sector may be primarily attributed to factors such as lower wages (cited by 49 percent employers), shifts in personal interests after 1-2 years of employment (cited by 33 percent employers), and the anticipation of more lucrative job opportunities, as cited by 49 percent employers. There was no substantial difference in reasons cited by organized and unorganized employees.

FIGURE 40: SHARE (IN PERCENTAGE) OF EMPLOYERS CITING VARIOUS REASONS FOR ATTRITION AMONG WORKERS

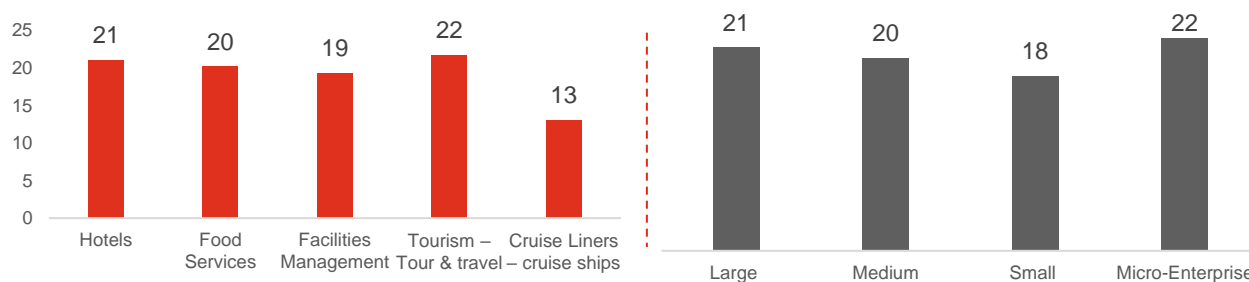


N = 553

Question: What are the key reasons for attrition in your organization?

Analyzing attrition rate across sub-sectors and firm sizes revealed that tourism and travel companies and micro enterprises have the highest attrition rate, reported by 22 percent of employers each. Specifically, out of the five sub-sectors, employers in tourism – tour and travel, food services and facilities management accounted for higher attrition rate compared to others, at 22 percent, 20 percent and 19 percent respectively. Across firm sizes, micro-sized enterprises exhibited the highest attrition rate (22 percent), followed by large-sized enterprises (21 percent), and as apparent, the rate of attrition across firm sizes or organization types through the employers surveyed do not vary largely.

FIGURE 41: AVERAGE ATTRITION RATE (IN PERCENTAGE) IN LAST YEAR FY 2022-23, CATEGORY WISE AND FIRM-SIZE WISE



N = 553

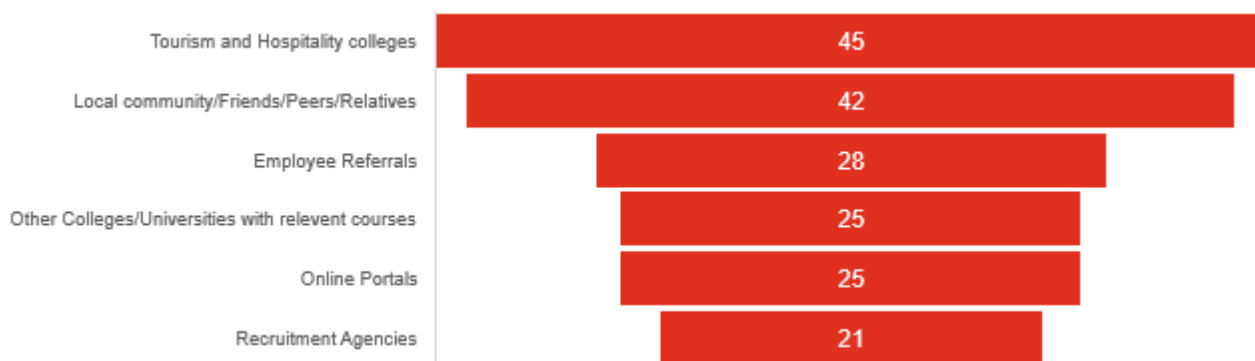
Question: What has been the average attrition rate/labour turnover rate in your organization in last year FY 2022-23?

4.2. Recruitment Patterns and Challenges

The employer survey attempted to understand the most common modes of recruitment for entry-level workers. This medium of recruitments ranged from Tourism and Hospitality colleges (Institute of Hotel Management (IHM), India School of Hospitality (ISH)) to Industrial Training Institutes (ITI) /Polytechnics which have or those which do not have dedicated Tourism and Hospitality course, vocational and short-term training Institute/NGOs, Employee Referrals, etc.

The findings revealed that recruiting from the Tourism and Hospitality colleges was the most frequently used recruitment method, as reported by nearly half (i.e. 45 percent) of employers. Mode of local community, friends, peers etc. emerged as another significant recruitment channel, with 42 percent of employers utilizing this method, suggesting a strong reliance on local talent pools. Additionally, 28 percent and 25 percent of the employers highlighted that utilizing employee referrals and recruiting students from other colleges and universities, especially those with dedicated Tourism and Hospitality programs, constituted the other preferred methods of recruitment. Online portals also played a crucial role as a typical mode of recruitment adopted by the employers, as 25 percent of employers shared using online platforms to source candidates, followed by recruitment agencies mode of recruitment as preferred by 21 percent of the surveyed employees.

FIGURE 42: SHARE (IN PERCENTAGE) OF EMPLOYERS USING VARIOUS RECRUITMENT MODES TO RECRUIT ENTRY-LEVEL WORKERS



N = 553

Note: This was a multiple-choice question, responses may add up to more than 100 percent. Only top 5 choices are shown.

Question: What are the most common modes of recruitment for entry level workers?

The same analysis, when run across the sub-sectors revealed that in three sub-sectors (i.e., hotels, facilities management and cruise liners – cruise ships sub-sector), recruitment predominantly happened through Tourism and Hospitality colleges. This mode was followed by the local community channels (highest recruitment mode within food services sub-sector as cited by 43 percent employers of that sub-sector and within tourism – tours and travels sub-sector, as cited by 58 percent employers of that sub-sector). No significant differences were observed between the size of the firm or organized and unorganized type of firms.

TABLE 7: SHARE (IN PERCENTAGE) OF EMPLOYERS PREFERRED MODE OF RECRUITMENT, SUB-SECTOR LEVEL ANALYSIS

Mode of recruitment	Hotels	Food Services	Facilities Management	Tourism – Tour and travel	Cruise Liners – cruise ships
Tourism and Hospitality colleges (IHM - Institute of Hotel Management, ISH- India School of Hospitality etc.)	53	32	45	32	100
Other Colleges/Universities which have dedicated Tourism and Hospitality course	30	17	38	13	20
Other Colleges/Universities which do not have Tourism and Hospitality course	17	12	17	11	0
ITI/Polytechnics which have dedicated Tourism and Hospitality course	18	7	24	3	60
ITI/Polytechnics which do not have dedicated Tourism and Hospitality course	20	7	26	8	20
Vocational/short term training Institute/NGOs	18	11	17	6	0
Employee Referrals	29	26	24	27	20
Newspaper/Advertisements/ Pamphlets	15	12	14	16	20
Recruitment Agencies	21	14	24	32	20
Online Portals	24	20	40	31	20
Local community/Friends/Peers/ Relatives	38	43	36	58	20

N=553 for total; N=289 for Hotels; N=155 for Food Services; N=42 for Facilities Management; N=62 for Tourism - Tours and Travels; N=5 for Cruise Liners - Cruise Ships.

Note: this was a multiple-choice question, responses may add up to more than 100 percent.

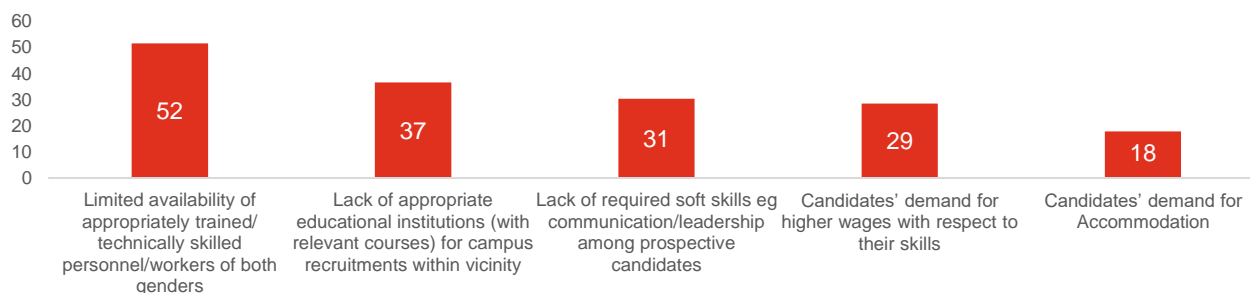
Question: What are the most common modes of recruitment for entry level workers? (assessed across sub-sectors)

Recruitment Challenges

Recruitment hurdles in tourism and hospitality included a scarcity of technical and soft skills in candidates, deficiencies in relevant education, and a limited pool of female job seekers. In the case of women, challenges related to early marriage and a higher rate of offer declines are reported.

One of the important elements of our employer survey was to inquire about key challenges the employers faced while recruiting entry-level workers or fresher candidates for jobs. We found that 52 percent of employers felt limited availability of appropriately trained and technically skilled personnel/workers of both genders as a key barrier, underscoring the importance of candidates possessing essential technical competencies. About 37 percent of employers felt that the lack of appropriate educational institutions (with relevant courses) for campus recruitment within the vicinity was an integral challenge to hiring suitable candidates for jobs. Further, 31 and 29 percent of employers cited a lack of required soft skills and concerns that higher wages would not sync with their skills as key challenges, highlighting the need for alignment between skills and work expectations. Around 18 percent of employers mentioned that demands for accommodation by candidates were another challenge they faced while recruiting them. The challenges shared by the employers therefore showcase the multifaceted nature of recruitment challenges that employers face, encompassing both technical and soft skill gaps, salary inconsistencies, educational prerequisites, work experience demands, workforce stability and logistical considerations.

FIGURE 43: SHARE (IN PERCENTAGE) OF EMPLOYERS FACING RECRUITMENT CHALLENGES IN HIRING ENTRY-LEVEL WORKERS



N=553

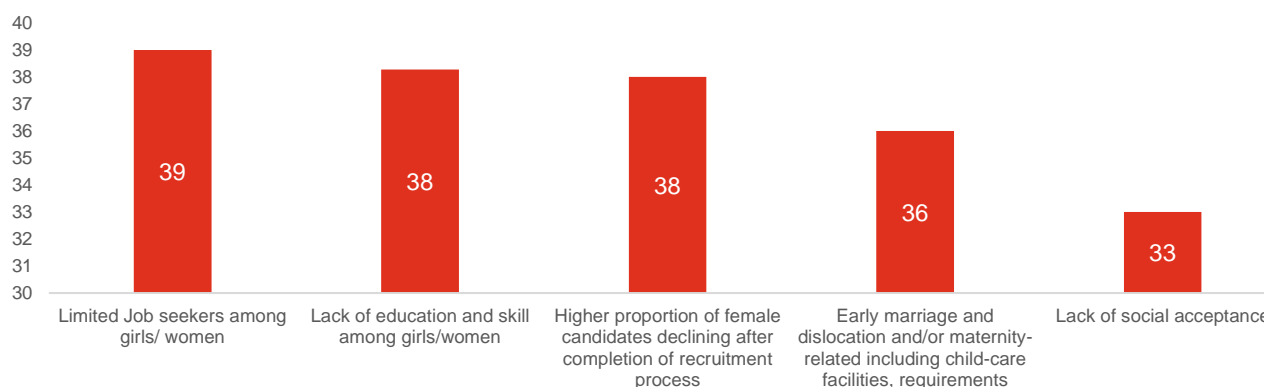
Note: only top 5 choices shown; this was a multiple-choice question, responses may add up to more than 100 percent.

Question: What are the key challenges faced while recruiting for entry level candidates for jobs in your organization?

The qualitative interview with an Executive Committee Member of the Association of Tourism Trade Organizations India supports the quantitative findings. The executive committee member indicated that hotels, especially those mandated to include full-fledged restaurants, encounter difficulties in hiring skilled kitchen staff. He has also mentioned that acquiring talent for restaurant positions is particularly challenging as individuals perceive the industry being sensitive to becoming risk averse due to the COVID-19 pandemic. Poor working conditions further deter prospective employees. Despite comprehensive education in hotel management institutes covering various aspects such as food production, front office and logistics, there is a mismatch between industry requirements and available talent. While hotels are recruiting directly from these institutes, the overall shortage of skilled labor persists. The industry's demand for skilled professionals is high, but educational institutions are struggling to meet these requirements, contributing to a persistent labor shortage.

Upon examining the challenges faced in hiring entry- level workers, there were seemingly no major differences seen across the sub-sectors as shared by employers surveyed. However, as we questioned on whether challenges were any different in the organization while recruiting women candidates at entry level positions, we found that overall 29 percent of the employers shared that there were challenges faced differently while recruiting women candidates for entry-level positions. Further, relatively larger share of unorganized firms' employers (31 percent) compared to organized firms' employers (28 percent) believed that recruitment challenges are somewhat different for women candidates than males for entry-level positions. We further inquired the different forms of recruitment challenges faced by employers. Of the employers believing the challenges are different for women candidates, 39 percent employers attributed these differences to the limited availability of female job seekers; 38 percent employers accounted for lack of education and skills among girls and women, and 38 percent employers mentioned that female candidates frequently decline offers after completing the recruitment process.

FIGURE 44: SHARE (IN PERCENTAGE) OF EMPLOYERS FACING RECRUITMENT CHALLENGES IN HIRING ENTRY-LEVEL FEMALE WORKERS



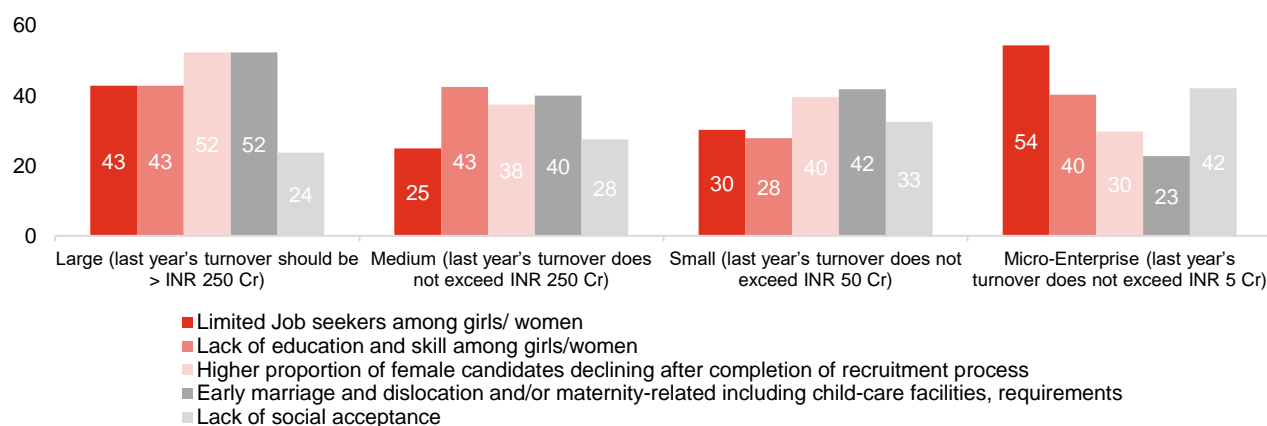
N=162

Note: only top 5 choices shown; this was a multiple-choice question, responses may add up to more than 100 percent.

Question: What are challenges in recruitment for entry-level female workers?

We further analyzed the types of recruitment challenges for female entry-level workers across the scale of organization. Overall, the most significant challenge reported by employers at the aggregate level was the limited availability of job seekers among girls and women, cited by 39 percent of employers. This was followed by concerns about lack of education/skills, mentioned by 38 percent, and a higher proportion of female candidates declining offers after completing the recruitment process, noted by 37 percent of employers. The impediments while recruiting female entry level workers differed for employers belonging to different scale of organizations. While recruiting female candidates, 52 percent employers in large-scale and small-scale enterprises faced challenges as early marriage and higher proportion of female candidates backed out after completion of recruitment process. As cited by 43 percent employers in the medium-scale enterprises, lack of education was the key challenge faced while recruiting new women candidates. Among employers belonging to micro-scale enterprises, 54 percent cited limited availability of female candidates as an issue when recruiting suitable female entry-level workers.

FIGURE 45: SHARE (IN PERCENTAGE) OF EMPLOYERS FACING RECRUITMENT CHALLENGES IN HIRING ENTRY-LEVEL FEMALE WORKERS, AS PER FIRM SIZE



N=21 for large, 40 for Medium, N=43 for Small and N=57 for Micro

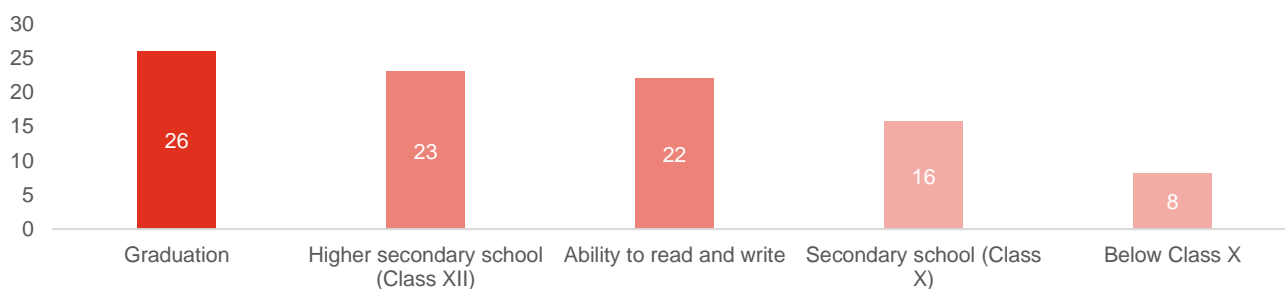
Note: this was a multiple-choice question; only top 5 choices are shown; responses may add up to more than 100 percent.

Question: What are challenges in recruitment for entry-level female workers?

4.3. Required Educational Qualifications

In addition to understanding the recruitment challenges for entry level workers, a special focus was on the minimum educational qualification that employers prefer while recruiting entry-level workers. We found that a candidate with a general graduation degree is most preferred, with 26 percent employers citing for the same. This is followed by requirement of higher secondary (class XIIth) pass out (as per 23 percent of employers). Additionally, 23 percent of the employers do not require any educational degree but only the ability to read and write.

FIGURE 46: SHARE (IN PERCENTAGE) OF EMPLOYERS REPORTING THE MINIMUM EDUCATION QUALIFICATION REQUIRED IN ENTRY-LEVEL WORKERS



N=553

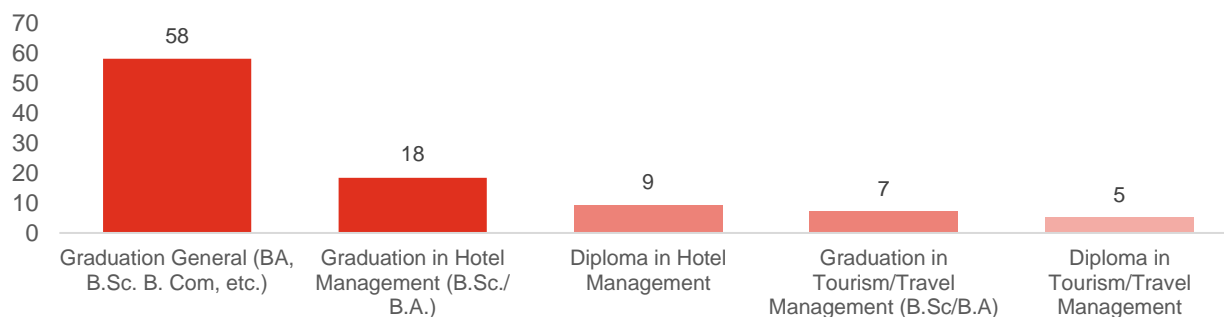
Question: What is the minimum education qualification for the entry-level workers in your organization?

The sub-sector level analysis suggests that graduation degree requirement was the common minimum education qualification to employers in all the sub-sectors except for the food services; 37 percent of the total sampled employer in the sub-sector reported that ability to read as minimum education qualification requirement among the prospective

entry-level workers. One of the reasons for this minimum qualification could be the unorganized nature of the industry requiring low-skilled tasks such as cleaning, dishwashing, laundry, etc.

Additionally with the educational qualification, we inquired with the employers on the minimum educational degree course required for the entry-level workers in their organization. Of those employers seeking graduates, 58 percent shared that they seek general graduation degree in prospective candidates that could be in any field whether in arts, commerce or science fields; 18 percent shared they require graduation specifically in hotel management such as a B.Sc. or a B.A. degree in hotel management; while 9 percent of total employers surveyed shared that they demand diploma degree in hotel management among the candidates willing to join as entry-level workers in their firms.

FIGURE 47: SHARE (IN PERCENTAGE) OF EMPLOYERS ON MINIMUM EDUCATION DEGREE COURSE REQUIRED



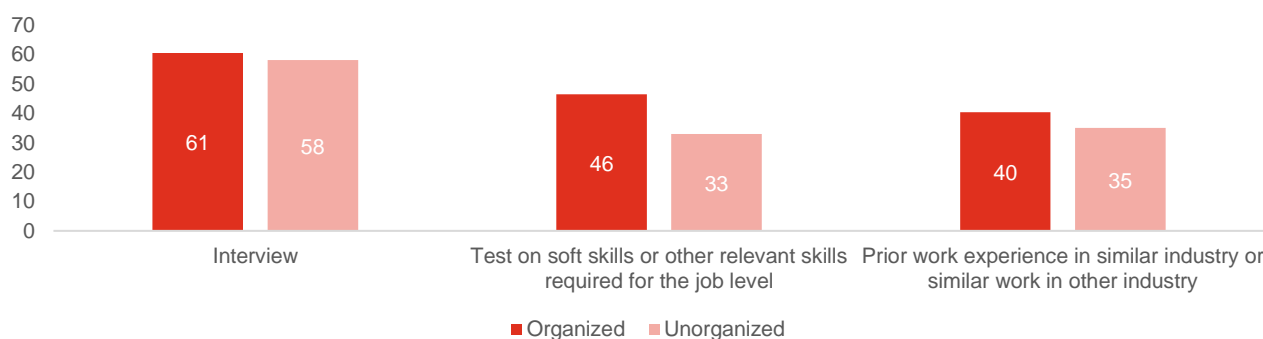
N=143

Question: What is the minimum education qualification for the entry-level workers in your organization?

Competency Assessment of Entry-level Workers

Given the requirements of educational qualification and degree for potential entry-level workers, we also asked the employers on how they determined the competency of workers while selecting them. Findings suggest that interviews medium is the most preferred method as per 57 percent of employers, followed by test on soft skills or other relevant skills required for the job level (39 percent) and prior work experience in similar industry or in other industry (37 percent). When these competencies were analyzed for employers' firm type – organized/unorganized, we found that 61 percent of organized firms' employers and 58 percent unorganized firms preferred interview method for testing competency.

FIGURE 48: SHARE (IN PERCENTAGE) OF EMPLOYERS CATEGORIZED AMONG ORGANIZED AND UNORGANIZED FIRM TYPE, PREFERRED ASSESSMENT FOR THE COMPETENCY OF WORKERS



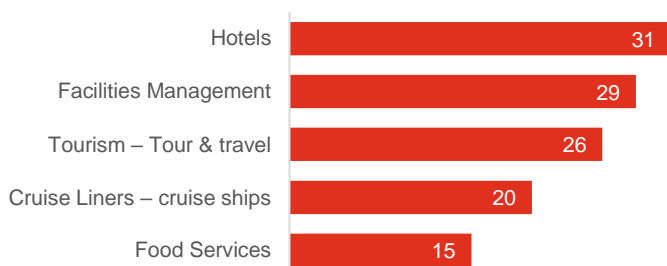
N=553 for total; N=228 for organized, 325 for unorganized

Note: only top 3 choices are shown in the graph; this was a multiple-choice question asked hence responses may not add up to 100 percent.

Question: How do you determine the competency of workers while selecting them?

4.4. Awareness About Recruit-Train-Deploy (RTD)

FIGURE 49: EMPLOYERS (IN PERCENTAGE) ACROSS SUB-SECTORS KNOWING OF RTD



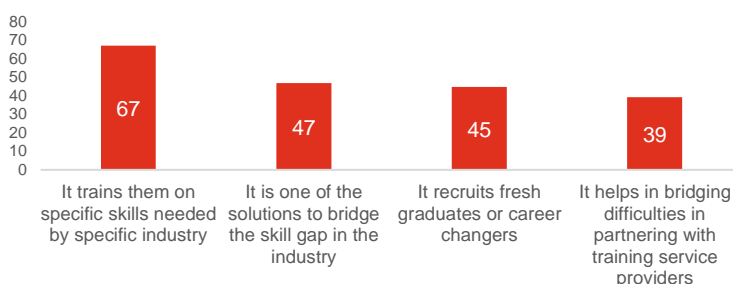
N=553 for total; N=289 for hotels, N=155 for Food Services; N=42 for Facilities Management and N=62 for Tours and Travels; N=5 for cruise liners

Question: Do you know about industry funded trainings for hiring candidates through RTD- Recruit Train Deploy?

Considering the significance of Recruit Train Deploy (RTD) as an opportunity for industry engagement in developing youth skills according to industry/employer requirements, we inquired employers to gauge their awareness of industry-funded training programs for hiring candidates through RTD. Overall, only 26 percent of employers were aware about the RTD. Within the sub-sectors, 31 percent employers in hotels sub-sector were aware about RTD, compared to 29 percent employers in Facilities Management and 26 percent employers within Tourism Tours and Travels.

Among the 26 percent of employers who reported awareness of RTD, we conducted further inquiries to ascertain the extent of their understanding regarding RTD. Of these 26 percent, 67 percent employers shared that RTD helps in training the employees on specific skills needed by specific industry, 47 percent employers cited that RTD is one of the solutions to bridge the skill gap in the industry, 45 percent employers shared that RTD aids in recruiting fresh graduates or career changers, 39 percent employers shared that fresh or career changes, 39 percent employers shared that RTD helps in bridging difficulties in partnering with training service providers.

FIGURE 50: SHARE (IN PERCENTAGE) OF EMPLOYERS CITING AWARENESS OF RTD



N=143

Question: What is your awareness about RTD - Recruit Train Deploy?

To gauge the employers' interest for RTD, we asked them if they would like to adopt RTD method for hiring employees in their organization. Out of the total 26 employers who had expressed awareness for RTD, 71 percent employers were interested in adopting RTD, 23 percent employers were not sure of adopting or not and rest were not willing to adopt RTD for employing workers. The same when assessed across the type of firm to which employers belonged, it is seen that among the unorganized firms' employers, 77 percent employers were interested in adopting RTD in future, while in organized firms' employers share, only 64 percent employers expressed inclination of adopting RTD.

TABLE 8: SHARE (IN PERCENTAGE) OF EMPLOYERS WILLING TO ADOPT THE RTD – RECRUIT TRAIN DEPLOY METHOD FOR HIRING EMPLOYEES IN YOUR ORGANIZATION

Perception regarding adoption of RTD	Organized (in %)	Unorganized (in %)	Total (in %)
Interested to adopt RTD	64	77	71
Not sure	31	15	23
Not willing to adopt RTD	4	8	6

N=143

Question: Will you adopt the RTD – Recruit Train Deploy method for hiring employees in your organization?

Employers who were hesitant or uncertain about adopting RTD as a recruitment strategy cited reasons such as skepticism about the approach (56 percent), lack of resources for training collaboration (22 percent), difficulty in partnering with training service providers (11 percent), and uncertainty about the quality of trainers (11 percent).

4.5. Job Roles for Entry-Level Workers

To gauge the job-role level recruitment of entry level workers, we inquired with the employers about their sector-specific recruitment priorities. We categorized top job roles at sub-sector levels and by form type, yielding valuable insights into current trends and employer preferences.

We asked the employers about the top job roles in which they hired entry-level workers in FY22-23. We found that top entry-level job roles are consistent across both organized and unorganized sectors, but organized employers tend to favor executive positions more than unorganized ones. For example, in the hotels sub-sector, 32 percent of employers from organized firms recruited executive housekeeper, compared to 21 percent among unorganized firms' employers. Similarly, within the facilities management sub-sector, 61 percent of employers in organized firms hired the entry level workers for the job role of a facility management executive, compared to only 21 percent of employers in unorganized firms. In the Hotels sub-sector (289 employers), entry level workers for roles like Assistant Chef (43 percent), Commis Chef (31 percent) and Duty Manager (29 percent) were prominently recruited. In the Food Services sub-sector (155 employers), Kitchen Helper (45 percent), Demi Chef De Partie (35 percent), and Food and Beverage Service (35 percent) were the top entry-level positions. For Facility Management (42 employers), roles such as facility staff manager (48 percent), multi-purpose associate (45 percent) and billing executive (45 percent) were notable. In the Tourism, Tours and Travels sector (62 employers), Assistant Instructor - Rope Activities (58 percent), Adventure Travel Guide (53 percent), and Customer Service Executive (Meet and Greet) (52 percent) were sought-after entry-level roles. In the Cruise Liners – Cruise Ships sector (5 employers), Chef de Partie (80 percent), Assistant Chef (60 percent), and Demi Chef De Partie (60 percent) were the prominent entry-level positions.

TABLE 9: SHARE (IN PERCENTAGE) OF EMPLOYERS CITING TOP 5 JOB ROLES IN WHICH MAJORITY OF ENTRY LEVEL WORKERS WERE RECRUITED IN THE FY 2022-23

Sub-Sector	Job Roles	Overall (in %)	Organized (in %)	Unorganized (in %)
Hotels (n = 289)	Assistant Chef	43	42	43
	Commis Chef	31	38	26
	Duty Manager	29	29	29
	Executive Housekeeper	27	32	21
	Food and Beverage Associate	23	42	43
Food Services (n=155)	Kitchen Helper	45	49	43
	Demi Chef De Partie	35	53	28
	Food and Beverage Service - Associate	35	49	29
	Counter Sales Executive-Tourism and Hospitality	34	51	27
	Assistant Chef	25	21	27
Facility Management (n =42)	Facility Manager - staff	48	67	33
	Multi - Purpose Associate	45	67	29
	Billing Executive	45	56	38
	Facility Management Executive	38	61	21
	Property Manager (FM)	38	56	25
Tourism – Tour and Travel (n =62)	Assistant Instructor -Rope Activities	58	63	56
	Adventure Travel Guide	53	42	58
	Customer Service Executive (Meet and Greet)	52	74	42
	Camp Helper	47	47	47
	Meet and Greet Officer	39	58	30
Cruise Liners – Cruise Ships (n=5)	Chef de Partie	80	75	100
	Assistant Chef	60	50	100
	Demi Chef De Partie	60	50	100
	Duty Manager	40	50	0
	Guest Service Associate (Front Office)	40	50	0

Note: this was a multiple-choice question, responses may not add up to 100 percent.

Note: The sample size for cruise liner employers was small, and hence findings may not be inferential.

Question: What are the top 5 job roles in which you have recruited majority of your entry level workers in the past year, i.e., FY 2022-23?

We also consulted senior representatives of the THSC Board Members regarding vacancies in their respective organizations to gauge the demand for entry-level workers in various job roles. Our findings indicate that employers were actively seeking to recruit workers in a multitude of job roles over the next 12 months. Specifically, within hotels, these roles encompass **Event Management, Finance and Accounting, Food and Beverage and Culinary, Housekeeping and Laundry, Loss Prevention and Security, Procurement, Purchasing, and Quality Assurance, Property Leadership, Revenue Management, Rooms and Guest Services Operations, Sales and Marketing, and Spa.** In the field of tourism and travels, there is a demand for roles such as **Ticketing Executive, Visa Executive, Tour Executive (Inbound and Outbound), Accountant and Marketing Executive.**

These findings highlight how the most sought-after job roles in the present era, as per employers recruitment preferences at the sectoral level, reflect the evolving trends within the job markets. Further, we asked the industry associations as well on how they perceive relevant job roles across sub-sectors to advance or evolve with the changing technological advancements. According to the Consulting Chief Executive Officer, Federation of Associations in Indian Tourism and Hospitality, the impact of automation on job roles varies across skill levels, with skilled roles such as managers and customer-facing positions in industries like food production less likely to be significantly affected. Jobs requiring people-intensive tasks, such as servicing customers in transportation or hotels, will continue to rely on human interaction. In certain areas like market analysis or accounting, where tasks are data-driven, automation may play a role in supplementing work, but direct one-on-one interactions tasks within the industry may not be drastically reduced.

Additionally, we asked the employers about the hard-to-fill occupations in their organization for entry-level workers. Our inquiry revealed that the top five entry-level job roles in which entry level workers are recruited aligned with the most challenging positions in recruitment. This is particularly evident in certain job roles, such as assistant chefs in unorganized firms and hotels and executive-level positions in the organized sector, particularly due to a lack of technical skills. For instance, for employers in the hotel sub-sector, job role of assistant chef was one of the most challenging or hard-to-fill job roles with 38 percent employers citing it as a challenging job role. While the same job role is also highly required job role but not easy to fill, as shared by 43 percent employers within hotels sub-sector. Conversely, among surveyed employers in the Cruise Liners – Cruise Ships sub-sector, job roles like bartender (4 percent), commis chef (3 percent), and barista executive (3 percent) were identified as hard-to-fill positions, not aligning with the top job roles demanded in that sub-sector. For the rest three sub-sectors, i.e., Food Services, Facilities Management and Tourism – Travels and Tours employers, the top five job roles demanded aligned with the top hard-to-fill job roles, with employers sharing reasons such as lack of technical skills, lack of soft skills in the prospective workers, etc.

To ensure our quantitative findings align with the qualitative insights, we interacted with the Founder President and Chairman of Professional Housekeepers Association who mentioned that finding labour for roles such as housekeeping associates, kitchen stewards and cleaning staff poses as a challenge, given the nature of these positions as menial jobs. The difficulty lies in recruiting individuals with the requisite education level and training them stands an additional challenge. The Director of The Indian Federation of Culinary Associations also mentioned that well-trained chefs are most difficult to recruit especially because the assistant chefs in hotels are not skilled enough and makes the recruitment a lot more challenging.

TABLE 10: SHARE (IN PERCENTAGE) OF EMPLOYERS CITING TOP 5 HARD-TO-FILL JOB ROLES

Sub-Sector	Job Roles	Overall (in %)	Organized (in %)	Unorganized (in %)
Hotels (n = 289)	Banquet Manager (Operation) – staff	39	27	39
	Duty Manager	31	22	25
	Chef de Partie	31	22	28
	Assistant Chef	28	19	38
	Commis Chef	25	17	32
Food Services (n=155)	Counter Sales Executive- Tourism and Hospitality	22	51	25
	Food and Beverage Controller	13	30	21

Sub-Sector	Job Roles	Overall (in %)	Organized (in %)	Unorganized (in %)
	Food and Beverage Service - Associate	11	26	30
	Kitchen Helper	11	26	24
	Store Assistant- Tourism and Hospitality	10	23	24
Facility Management (n =42)	Facility Management Executive	12	67	8
	Multi - Purpose Associate	11	61	8
	Catering Manager - staff	4	22	9
	Cafeteria Supervisor	1	6	10
	Pantry Associate	3	17	7
Tourism – Tour and Travel (n =62)	Adventure Travel Guide	10	53	17
	Tour Escort	9	47	16
	Meet and Greet Officer	8	42	15
	Assistant Instructor -Rope Activities	7	37	13
	Camp Helper	4	21	12
Cruise Liners – Cruise Ships (n=5)	Commis Chef	4	100	1
	Bartender	3	75	0
	Barista Executive	3	75	0
	Banquet Manager (Operation)	1	25	1
	Demi Chef De Partie	0	0	1

Note: this was a multiple-choice question, responses may not add up to 100 percent.

Note: The sample size for cruise liner employers was small, and hence findings may not be inferential.

Question: What are the hard-to-fill occupations in your organization for entry-level workers?

Given how the expectations in this industry are constantly dynamic and changing, our qualitative insights revealed that conventional tourism is evolving. The roles of travel agents and tour operators are shifting, with a potential focus on the transportation services. Tourism packaging has transformed, incorporating walk-in and specialized interest tours. The industry is adapting to changing preferences and expectations, as remarked by the President, Tourist Guides Federation of South India during our interactions with him.

4.6. Wages and Wage Premium

In the youth survey findings, we discovered that wages play a significant role in determining employment satisfaction or dissatisfaction. In this section, we therefore delved into an understanding of the remuneration provided by the employers. To assess the wage dynamics, we asked the employers about the monthly employers-level workers in their organization. The employers' survey findings revealed that the

overall median monthly wage for entry-level workers was INR 13,000. At the firm-level analysis, the median monthly wage in the organized sector was INR 15,000, while in the unorganized sector, it was INR 12,000. The sub-sector level analysis revealed that employers in the hotels, facilities management and tourism- tour and travel sub-sectors offered a median monthly wage of INR 15,000 each, while employers in the cruise liners – cruise ships sector offered INR 14,000 and employers in the food services sub-sector offered INR 10,000 only.

FIGURE 51: MEDIAN MONTHLY WAGES (IN INR) OFFERED TO ENTRY LEVEL



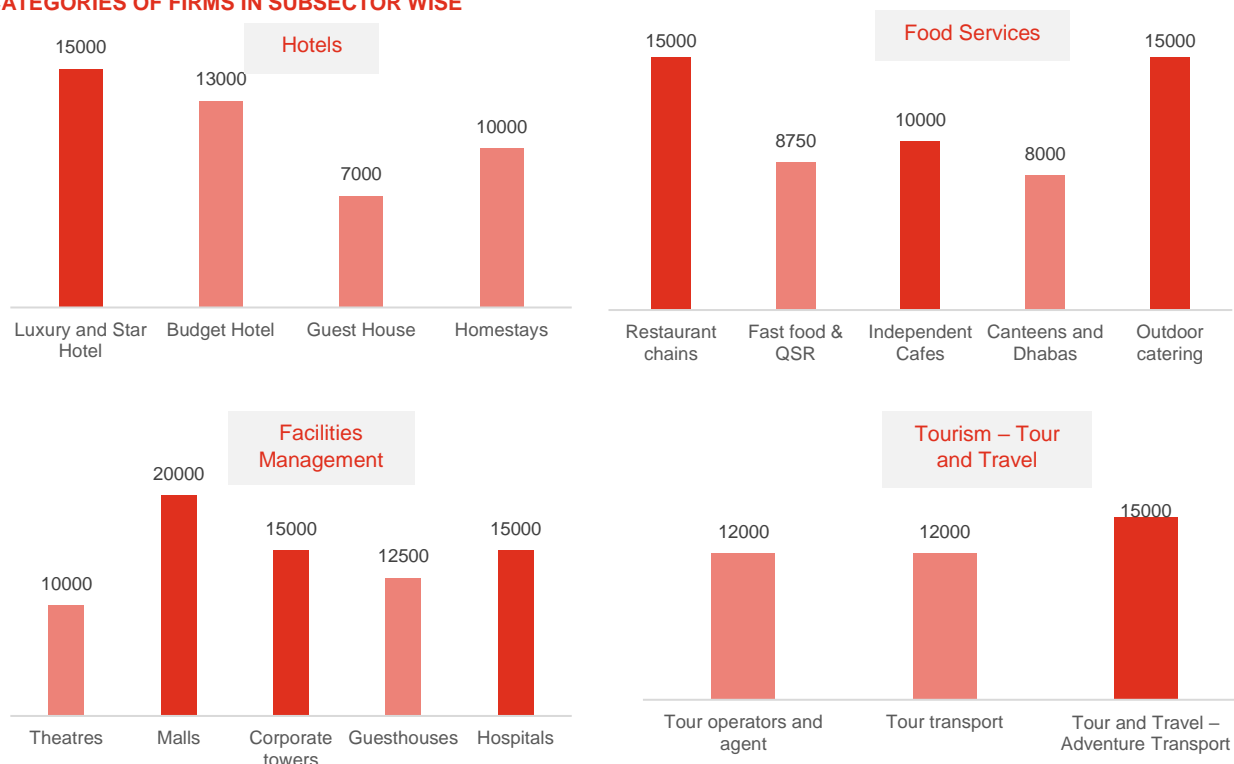
N=553

Question: What is the average monthly wage offered to entry-level workers in your organization?

During our qualitative interactions with different stakeholders, we found a similar perspective being shared by the training service providers. As per the Technical lead of the Hospitality sector, IL&FS Skills Development Corporation Limited, about 80-85 percent of trained candidates get placed or acquire internships and then offer jobs through campus interviews. But the wage level offered varies from city to city, the minimum being INR 15,000 on an average.

We also inquired about wage level offered to workers for different firm categories within the sub-sectors. Notably, in the food Services sub-sector, all categories of firms, except for restaurant chains and outdoor catering, offer a monthly median wage of INR 10,000 or lower to entry-level workers. Restaurant chains and outdoor catering provide a slightly higher monthly median wage at INR 15,000 each. In the hotels sub-sector, luxury and star hotel categories offer a median monthly wage of INR 15,000 to workers, followed by budget hotels with INR 13,000. Within the facilities management sub-sector, the malls category leads with the highest offering at INR 20,000. In the Tourism-Tour and Travel sub-sector, firms in the tour and travel – adventure transport category offer the highest monthly median wages to their workers, as reported by employers.

FIGURE 52: MEDIAN MONTHLY WAGES (IN INR) OFFERED TO ENTRY LEVEL WORKERS ACROSS DIFFERENT CATEGORIES OF FIRMS IN SUBSECTOR WISE



N=289 for Hotels; N=155 for Food Services; N=42 for Facilities Management; N=62 for Tourism - Tours and Travels
 Question: What is the average monthly wage offered to entry-level workers in your organization?

We further tried to understand if the employers provide a wage premium over and above the regular wage to the workers. Regarding the provisioning of wage-premium to entry-level workers and employees, 83 percent employers responded to offer premium wages. To these 83 percent of employers, we further inquired about the reasons for offering such wage premiums. Among the 83 percent of employers surveyed, 67 percent cited technical skills as reasons for offering wage premiums, 49 percent mentioned hands-on training as a factor, while 40 percent pointed to the exposure gained through vocational training programs (short-term training programs).

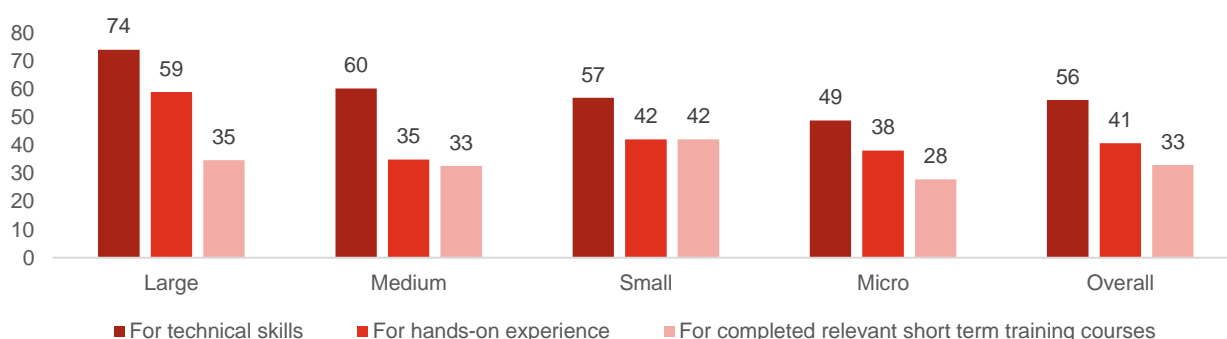
FIGURE 53: REASONS FOR PROVIDING WAGE PREMIUM BY SHARE (IN PERCENTAGE) OF EMPLOYERS



N=461
 Question: Do you currently provide wage-premium to entry-level workers/ employees if they have some qualification relevant to job profile any relevant short term training courses or technical skills?

Additionally, we asked the employers the basis on which premium on wages was offered to workers. The primary reason that emerged for all employers, was for technical skills as expressed by 67 percent employers. Among the large-scale employers, 74 percent employers among medium scale firms, 60 percent, among small-scale firms and 57 percent among micro-sized firms, 49 percent employers accounted for offering wage premiums based on technical skills. Further, 28 percent of employers in small-sized enterprises provide wage premiums for completing relevant short-term training courses. Notably, when it comes to hands-on experience, employers in large-sized enterprises were more inclined, with 59 percent of them offering wage premiums for this criterion.

FIGURE 54: SHARE (IN PERCENTAGE) OF EMPLOYERS PROVIDING WAGE PREMIUMS, ACROSS FIRM SIZES



Overall N=461; N for Large = 62; N for Medium = 108; N for Small = 113; N for Micro = 178; The percentages may add up more than 100% as this was a multiple-choice question.

Question: Do you currently provide wage-premium to entry-level workers/ employees if they have some qualification relevant to job profile any relevant short term training courses or technical skills?

Of those willing employers to give premium wages, 88 percent among organized firms provided wage premium, which is slightly higher than employers in the unorganized firms (80 percent employers). Facilities management (88 percent) and hotels (86 percent) employers led in providing wage premiums across sub-sectors. Regarding reasons for providing premium on wages, employers of Facilities Management emphasized short-term training courses, while employers of hotel sub-sector prioritized technical experience among workers. Moreover, we asked the employers to imagine two people at entry-level job with exact same educational qualifications and work experience with one person having additional skills.

In this situation, the question was posed regarding what employers would offer as an additional wage premium to individuals with extra skills. The findings revealed that mostly employers would like to pay premiums within a range of 1-10 percent. Among those expressing a willingness to offer wage premiums, 47 percent of the employers from the micro-sized enterprises indicated a preference for offering premium of 1-5 percent more than standard wages. In the case of medium-sized and small-sized enterprises, approximately 44 percent of employers in each category reported willingness to provide a premium ranging from 6-10 percent more than normal wages for skilled entry-level workers.

TABLE 11: RANGE OF WAGE PREMIUM PROVIDED BY SHARE (IN PERCENTAGE) OF EMPLOYERS, ACROSS DIFFERENT FIRM SIZES

Range of Wage Premium offered	Large	Medium	Small	Micro	Total
1-5% more than normal wage	26	34	29	47	37
6-10% more than the normal wage	32	44	44	32	38
11-15% more than normal wage	29	15	18	13	17
16-25% more than normal wage	3	5	4	3	4
26% and more than normal wage	10	2	5	4	5

Overall N=461; N for Large = 62; N for Medium = 108; N for Small = 113; N for Micro = 178; The percentages may add up more than 100% as this was a multiple-choice question.

Question: Imagine two people at entry-level job, with exact same educational qualifications and work experience, but one person has additional skills. In such a scenario, what will you provide the average wage premium (in %) to the person with additional skills?

4.7. Skills and Training Requirements

To understand the skilling scenario of workers across firms, we inquired the employers whether they felt there was a need of skill development training for their workers. We find that 51 percent of the employers agreed on the need for skill training for their employees. Among the organized and unorganized firms, we found that employers from the organized sector (54 percent) required skill development for their workers more than those in the unorganized sector (49 percent).

We further asked the employers about the top five skills that they considered as most relevant for employees in their organization. Written and verbal communication emerged as the top skill as cited by 60 percent of employers, followed by complex problem-solving (49 percent of employers), and literacy/numeracy skills (47 percent of employers). A sub-sectors level analysis revealed that among the top five skills deemed most relevant by employers in their respective sub-sectors, three out of five sub-sectors' employers, prioritized written and verbal communication skills as the foremost attribute in their employees. This aligns with the overarching findings of the overall employers too. Further, employers in the hotels and tourism-tours and travels sub-sectors mentioned that critical thinking skills were important, while facility management employers underscored the importance of social and interpersonal skills.

Qualitative insights gathered from industry associations underscore the significance of foreign language skills in various sectors. According to the Executive Committee Member of the Association of Tourism Trade Organizations India, proficiency in languages, particularly in English is crucial. English-speaking guides, for instance, can potentially earn up to INR 6,000 to INR 7,000 per day. Thus, for training service provider companies, investing in foreign language studies not only enhances communication in the tourism and business sectors but also opens doors to market Indian products in countries like Japan. He further highlighted the importance of language training and creating avenues for diverse career paths. As highlighted by the National Training Delivery Head, Frankfinn Aviation Academy, Delhi, along with the core skills, digital and software skills are required due to the changing future of work. He shared that recently, more companies prefer software skills in students who would like to work in the hospitality industry.

Insights from qualitative interviews with different training service providers revealed that entry-level workers in the tourism and hospitality industry require a blend of skills and not just a few core skills alone. While specific technical skills related to the job are essential; personality traits and communication skills are equally important in this sector. Attributes such as effective interaction, adaptability, communication and multi-tasking are considered crucial. This dual emphasis on both soft skills and technical expertise reflects the dynamic nature of skill requirements within the evolving landscape of the tourism and hospitality industry.

FIGURE 55: TOP 5 MOST RELEVANT SKILLS, SUB-SECTOR WISE, AS CITED BY SHARE (IN PERCENTAGE) OF EMPLOYERS

Hotels	Food Services	Facilities Management
<ul style="list-style-type: none"> Written and verbal communication (60%) Complex problem solving (46%) Adaptive Learning (45%) Critical Thinking (44%) Literacy/Numeracy Skills (44%) 	<ul style="list-style-type: none"> Written and verbal communication (61%) Literacy/Numeracy Skills (52%) Complex Problem Solving (50%) Critical Thinking (50%) Adaptive Learning (41%) 	<ul style="list-style-type: none"> Complex Problem Solving (62%) Team Management Skills (60%) Literacy/Numeracy Skills (52%) Written, verbal communication (50%) Social Skills (48%)
Tourism – Tours and travels	Cruise Liners – Cruise Ships	Overall
<ul style="list-style-type: none"> Written and Verbal Communication (60%) Complex problem solving (52%) Adaptive learning (45%) Critical thinking (44%) Team management skills (44%) 	<ul style="list-style-type: none"> Adaptive learning (100%) Critical thinking (80%) Literacy/Numeracy skills (60%) Written and Verbal Communication (60%) Complex problem solving (20%) 	<ul style="list-style-type: none"> Written and verbal communication (60%) Complex problem solving (49%) Literacy/Numeracy Skills (47%) Team Management Skills (46%) Adaptive learning (45%)

Overall N=553

Question: Which five skills are most relevant for employees in your organization?

While identifying the pertinent skills is crucial, it is equally important to assess the areas where workers exhibit the least proficiency. Therefore, we asked the employers to identify the top five skills deemed most relevant to the workplace, as well as those in which workers are least proficient. As per the employers, written and verbal communication skills are most commonly deficient across three (hotels, food services, and tourism – tour and travel) out of five sub-sectors. Furthermore, in the facilities management sub-sector, 52 percent of employers and 40 percent

employers in cruise liner sub-sector mentioned that evaluation, judgment, and decision-making skills are also lacking in workers.

FIGURE 56: TOP 5 SKILLS WORKERS ARE LEAST PROFICIENT IN, SUB-SECTOR WISE, AS CITED BY SHARE (IN PERCENTAGE) OF EMPLOYERS

Hotels	Food Services	Facilities Management
<ul style="list-style-type: none"> • Written and verbal communication (51%) • Complex problem solving (45%) • Job relevant language skills (44%) • Digital/ICT skills (43%) • Team management skills (39%) 	<ul style="list-style-type: none"> • Written and verbal communication (58%) • Complex problem solving (53%) • Job relevant language skills (51%) • Adaptive Learning (44%) • Digital/ICT skills (39%) 	<ul style="list-style-type: none"> • Evaluation, judgment, and decision-making (52%) • Digital/ICT skills (48%) • Complex problem solving (45%) • Adaptive Learning (41%) • Written, verbal communication (41%) • Job relevant language skills (38%)
Tourism – Tour and Travel	Cruise Liners – Cruise Ships	Overall
<ul style="list-style-type: none"> • Written and Verbal Communication (63%) • Complex problem solving (63%) • Job relevant language skills (52%) • Digital/ICT skills (44%) • Team management skills (42%) • Adaptive Learning (42%) 	<ul style="list-style-type: none"> • Complex problem solving (100%) • Job relevant language skills (60%) • Evaluation, judgment, and decision-making (40%) • Digital/ICT skills (40%) • Social/interpersonal skills (40%) • Leadership (40%) 	<ul style="list-style-type: none"> • Written and verbal communication (53%) • Complex problem solving (50%) • Job relevant language skills (46%) • Digital/ICT skills (43%) • Adaptive Learning (38%)

Overall N=553

Question: Mention the top 5 skills most relevant to work in your organization which workers lack the most or are least proficient in?

During our interactions with educational institutions, we found that the Professor at the Institute of Hotel Management (IHM) shared that the culinary skilling landscape is undergoing a transformation and is seen to be no longer confined to traditional hotel management skilling aspects only. There is a growing need for increased focus on human behavioral training over the conventional kitchen skill-based training. The curriculum must be revamped to align with these changes. Additionally, it is imperative to consider a rise in manpower costs dependent on case-by-case basis for various sub-sectors within the industry. Overtime compensation along with wage hikes, is essential to address the looming manpower crunch.

We further found that specific skilling-related challenges exist, especially in certain job roles within the industry. Our discussions with Confederation of Indian Industry (CII) revealed that re-acquiring skilled talent has proven challenging, particularly in culinary roles where the transition from traditional ‘bawarchi’ to modern chefs is significant. The demand for culinary skills has increased, especially in food and beverage sector, yet attracting talent remains a hurdle. Reskilling programs have become vital, involving three tiers of training: institutional training, functional training and continuous upskilling. These programs are tailored to align with company requirements, evolving trends reflecting customer preferences and market-driven demands.

In a scenario where the same skill may be very relevant as well as lacking in proficiency among the workers, skill gaps are apparent to exist. The founder and CEO of Tasanaya Consulting Services highlighted that there is a noticeable shortage of skilled workers, and the same type of skills ranging from technical to soft skills are sought across various sectors, including retail and Banking, Financial Services and Insurance (BFSI). The requirement for employees capable of working across sectors is increasing. The issue of skills gaps was emphasized by the Vice President and the South India Chef Association, as he shared about shortage of entry-level and mid-level workers considering educational institutions like IIM and IHM catering to higher-level education prominently. Further, similar skills are sought across various sectors and unavailability of skilled workers affects all sectors in different ways.

As a response to the skill gaps and training needs of workers, the establishment of skill hubs offering travel and hospitality courses post-school hours is one of the forward-thinking initiatives, as the qualitative interactions revealed that these hubs not only accommodate the schedules of individuals seeking additional training, but also respond to the growing demand for specialized skills in the industry. With a focus on practicality, the courses integrate components such as cloud kitchens to align with evolving trends in the hospitality sector. Simultaneously, language skills among workers are emphasized as integral components by certain organizations whom we interacted with, highlighting its significance towards enhancing communication and service delivery of workers in the travel and hospitality fields.

Existing Training Landscape

Regarding training facilities for the employees, we inquired of the employers whether their organization provides training and further asked them what kind of facilities are being provided. Overall, only 34 percent of employers had training facilities for their employees. Of these 34 percent employers, 60 percent had in-house training facility while others (37 percent) relied on sponsored trainings or provided internship opportunities (33 percent). Further, organized firms had a higher percentage of training facilities compared to unorganized firms, with 54 percent and 21 percent, respectively, as reported by employers in each firm type. The sub-sector level analysis revealed that, hotels and facilities management had relatively more training facilities as accounted by 52 percent and 40 percent employers respectively.

FIGURE 57: SHARE (IN PERCENTAGE) OF EMPLOYERS HAVING TRAINING FACILITY



Overall N=553

Question: Does your organization have any training facility for the employees?

During conversations about the dynamics of industry training programs with interviewed stakeholders, the Executive Director of Skills at the Confederation of Indian Industry highlighted distinctions across size of the firm. Larger entities, with established programs and partnerships, differ in terms of provision of training from smaller players who depend on independent, uncertified training. Further, major industry players boast robust initiatives, while the smaller entities lack linkages, emphasizing the need for adaptability to online platforms across both industry and classroom training.

We also asked the employers about the output efficiency of a formally trained employee at the time of recruitment in comparison with an untrained employee. We noted slight differences across organized and unorganized firms' employers. Overall, 39 percent employers reported no difference in the output of trained and untrained employee. This was followed by 24 percent of the employers believing that a formally trained person was better by untrained by a margin of less than 10 percent.

TABLE 12: OUTPUT EFFICIENCY OF FORMAL TRAINED EMPLOYEE VERSUS UNTRAINED EMPLOYEE, AS CITED BY SHARE (IN PERCENTAGE) OF EMPLOYERS

Output Efficiency relative of trained versus untrained employee	Organized and Unorganized				Total	
	Organized		Unorganized		In Numbers	Percentage
	In Numbers	Percentage	In Numbers	Percentage		
No difference	70	31	145	45	215	39
Formally trained person is better by untrained by Less than 10%	60	26	74	23	134	24
Formally trained person is better by untrained between 10% to 20%	41	18	47	15	88	16
Formally trained person is better by untrained between 20 to 30%	22	10	24	7	46	8

Output Efficiency relative of trained versus untrained employee	Organized and Unorganized				Total	
	Organized		Unorganized		In Numbers	Percentage
	In Numbers	Percentage	In Numbers	Percentage		
Formally trained person is better by untrained between 30 to 40%	19	8	17	5	36	7
Formally trained person is better by untrained by above then 40%	16	7	18	5.5	34	6

Overall N=553; N=228, N=325 for organized, unorganized firms respectively

Question: What is the output efficiency of a formally trained employee at the time of recruitment in comparison with untrained employee?

Current Training Requirements

In terms of current requirements for providing skills training to employees, we inquired with the employers whether their workers required skills training. Out of the 553 overall surveyed employers, 51 percent of employers agreed on the need for providing skill training for their employees. Across the sub-sectors, the highest training need is required by 62 percent employers of Facilities Management sub-sector, followed by 53 percent employers each of Tourism and Cruise Liners sub-sectors.

FIGURE 58: SHARE (IN PERCENTAGE) OF EMPLOYERS ON REQUIREMENT FOR SKILL TRAINING FOR THEIR WORKERS



N=553 for total; N=289 for hotels, N=155 for Food Services; N=42 for Facilities Management and N=62 for Tours and Travels; N=5 for cruise liners

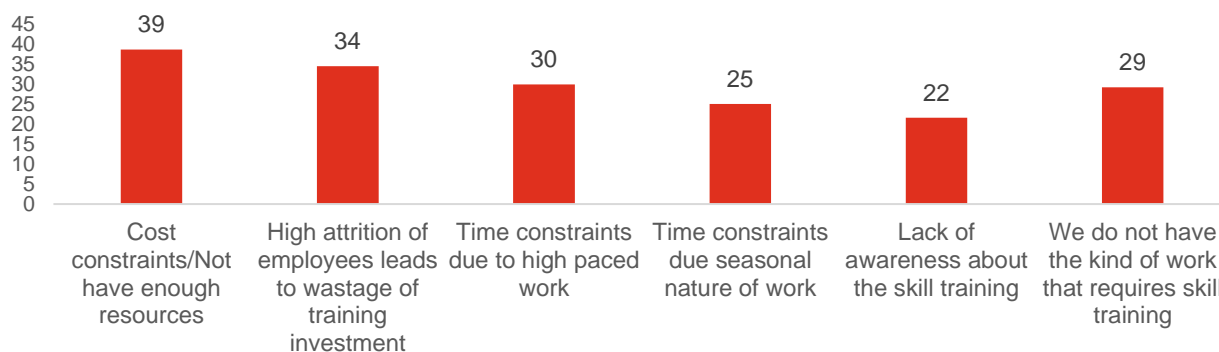
Question: Do you currently require that skills training is needed for your workers?

We correlated these findings with insights gained from our qualitative interactions with the selected educational institutions and government bodies. They shared on importance of the need for continuous training and upskilling of youth and how their academic curriculum attempts including on training in presentation skills, communication lab, and video blogging (French and English) along with various public speaking exercises, but these requirements depends on universities. Certain training activities such as learner-based assignments tailored for different levels (slow learners, intermediate learners, active learners) also differ from institute to institute. These insights matched with the youth surveys' findings as well on this issue.

Less than half of the employers expressed the need for additional training, citing reasons such as cost constraints, high attrition among workers and time constraints due to the fast-paced nature of work.

We further inquired with the employers on trainings that they had provided in the past 12 months. We found that of the 34 percent of employers who had training facility, 21 percent of employers had not provided any kind of trainings in the past year. The primary reasons cited for not providing training included cost constraints (39 percent employers) and high employee attrition (34 percent employers).

FIGURE 59: SHARE (IN PERCENTAGE) OF EMPLOYERS CITING REASONS FOR NOT PROVIDING TRAINING TO WORKERS



N=553 total

Question: Why have you not provided any training in last 12 months?

Regarding the plan for providing training to employees, we asked the employers whether they would be interested in providing the same. Overall, only 43 percent were interested in providing training for their employees in the coming 12 months. There were no significant differences across organized and unorganized sectors in their willingness to provide training. As a firm's size decreases, the willingness to provide training for their employees also decreased. The reasons shared by employers for no inclination to provide future training included cost constraints and not having enough resources, time constraints due to high-pace, high attrition of employees leading to wastage of training investment, as accounted for by 45, percent, 43 percent and 42 percent employers, respectively.

From our youth survey findings and qualitative survey insights, it was gathered that effective training programs for 2-3 years, rather than short-term courses, are deemed essential towards the skilling of youth. Communication skills (including response time and language command), and computer proficiency skills are increasingly crucial, and certain institutions like the Oberoi School of Training and the Taj Training Centre excel in training their personnel on these skills. However, standalone hotels are yet to match their level as they encounter challenges, as shared by the co-founder of Innovative Food Entrepreneurs Alliance. With the alignment of training needs and ongoing technological advancements, the upcoming years will show how each sub-sector is influenced by the demands of its training requirements. For instance, the emergence of data analytics for understanding customer preferences and menu analysis is anticipated for the food service industry, as revealed by our qualitative interviews.

4.8. Technology and Future of India's Tourism and Hospitality Sector

Technological progress causes a dual effect, encompassing both positive and negative facets. It is crucial to acknowledge that advancements in technology may displace certain jobs, but it can also give rise to new employment opportunities⁹¹. Automation has the potential to impact specific tasks, across different sub-sectors.. However, technological changes are unlikely to entirely replace the need for human laborers, especially considering the importance of soft skills in various job roles, at least in the near future.

In our discussion with an Executive Committee Member of the Association of Tourism Trade Organizations India, we found that the integration of AI tools at the workplace is changing the job landscape in the tourism and hospitality industry. Job roles which earlier required human engagement, such as content writing and social media management are now being affected by AI tools like ChatGPT. This shift towards AI-driven operations is creating new roles, especially in digital marketing. According to the Vice President of the National Restaurant Association of India, technological advancements are expected to impact some human tasks involving repetitive and manual work more than leading to specific job losses in the overall industry, for example, technology has already begun to affect roles such as cashiers. At the customer level, there is a noticeable change in user activity, fast-paced adoption of technology, and the increasing influence and use of social media. Technology plays an important role in spreading word-of-mouth, significantly impacting customer acquisition.

Technological changes are reshaping the future of work. In this context, our focus, through employer surveys and qualitative interviews, was on recognizing the necessity to adapt to advancing technologies, the dynamic shifts in job

⁹¹ Pew research center. (2014). AI, Robotics, and the Future of the Jobs. Retrieved from <https://www.pewresearch.org/internet/2014/08/06/future-of-jobs/>

roles, and the effect on skilling requirements in various segments of the tourism and hospitality industry. Our objective was to understand the industry's perspectives on technology and innovation, driven by socio-economic factors such as enhancing product quality, improving service delivery, increasing productivity and minimizing costs.

Current Adoption of Technology

Firstly, we inquired about the integration of technology into organizational operations. Overall, all the surveyed employers unanimously confirmed (i.e., 100 percent) to employing technology in some capacity within their organization's routine activities. Further inquiry into the current extent of technological adoption revealed that 69 percent of employers reported a relatively low (0-25 percent tasks being automated) level of technology adoption in their business activities.

FIGURE 60: SHARE (IN PERCENTAGE) OF EMPLOYERS CITING EXTENT OF TECHNOLOGY ADOPTION CURRENTLY IN THE ORGANIZATION'S BUSINESS ACTIVITY



N=553 total; N=243, 128, 116 and 66 for Micro-enterprise, small enterprise, medium enterprise, and large enterprise respectively
Question: What is the current extent of technological adoption in your organization's business activity?

While all employers were integrating technology into their business operations, most of the employers shared of having automated less than 25 percent of their tasks. Large-sized employers, however, indicated relatively more advanced technology adoption. Similarly, when conducting a sub-sector level analysis, there was a consensus among employers indicating a low level of technology adoption. Majority of employers, ranging from 58 percent in tourism and travel sub sector to 80 percent in cruise-liners sub-sector, reported a similar perception of limited technology utilization.

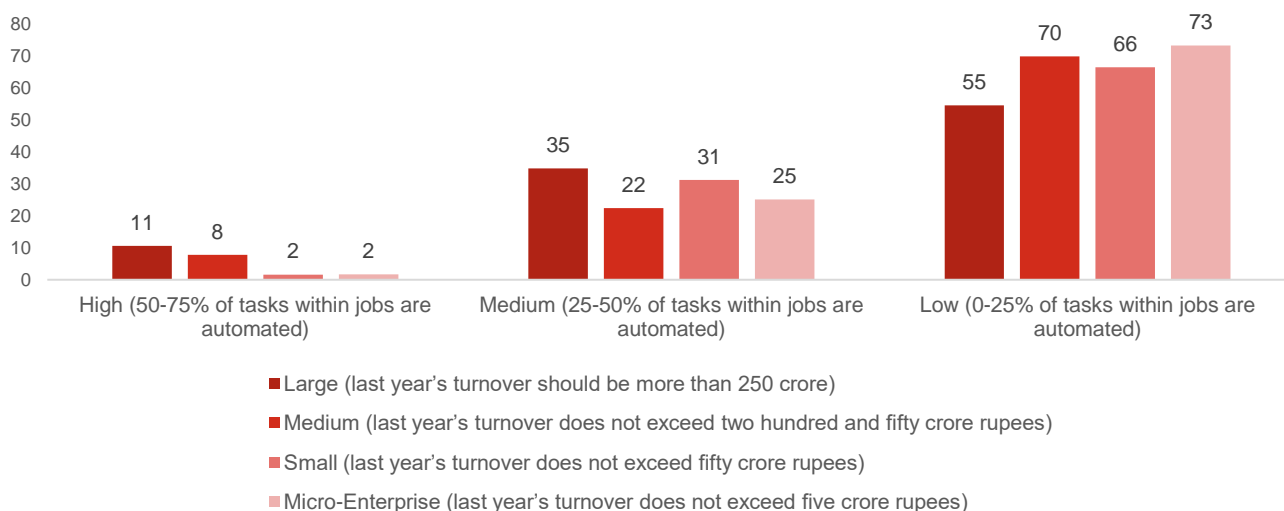
TABLE 13: CURRENT EXTENT OF TECHNOLOGY ADOPTION ACROSS SUB-SECTORS AS EXPRESSED BY SHARE (IN PERCENTAGE) OF EMPLOYERS

Extent of current technology adoption	Hotels	Food Services	Facilities Management	Tourism – Tour and travel	Cruise Liners – cruise ships	Total
Very high (75-100% of tasks within jobs are automated)	0	0	0	2	0	0
High (50-75% of tasks within jobs are automated)	5	3	5	5	0	4
Medium (25-50% of tasks within jobs are automated)	26	26	29	35	20	27
Low (0-25% of tasks within jobs are automated)	70	72	67	58	80	68

N=553 for total; N=289 for hotels, N=155 for Food Services; N=42 for Facilities Management and N=62 for Tours and Travels; N=5 for cruise liners
Question: What is the current extent of technological adoption in your organization's business activity?

With a notable low extent of technology usage in employers business operations, it became essential to examine this trend across various firm sizes. The analysis revealed that the prevalence of low technology use was more pronounced in micro and medium-sized enterprises, reported by 73 percent and 70 percent of employers, respectively. In large-sized enterprises, some level of technology adoption was observed, but it only covered a moderate range of 25-50 percent of business tasks being technologically advanced.

FIGURE 61: EXTENT OF TECHNOLOGY ADOPTION AS EXPRESSED BY SHARE (IN PERCENTAGE) OF EMPLOYERS



N=553 total; N=243, 128, 116 and 66 for Micro-enterprise, small enterprise, medium enterprise, and large enterprise respectively
 Question: What is the extent of automation expected in your organization's business activity say in next 3 years?

Our discussions with industry associations regarding the adoption of technology within the tourism and hospitality industries provided valuable insights. The Founder President and Chairman of the Professional Housekeepers Association stated that top management in the hospitality sector is already looking into using machines for cleaning, especially focusing on robotics. While big establishments like Taj and ITC can afford these changes, these changes are not common everywhere yet. For example, processes like room clearance and laundry are being streamlined through smartphone applications especially in large scale employers, indicating a gradual integration of technology into operational tasks within the industry.

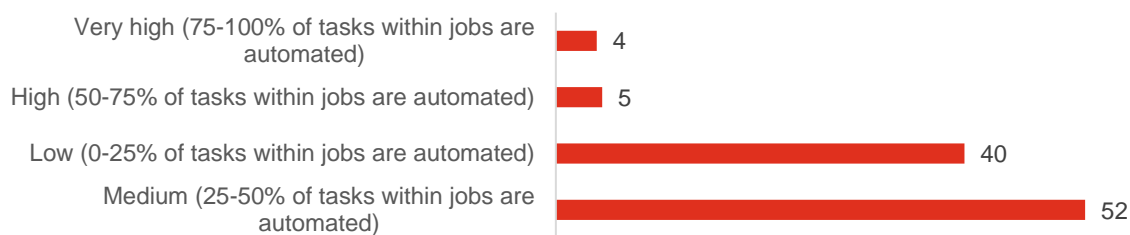
Our interactions with the Confederation of Indian Industry also revealed that the smaller entities, while potentially relying less on technology, will still need to devise effective marketing strategies, including a presence on social media. The evolving landscape necessitates a nuanced approach considering both technological integration and strategic marketing for businesses of varying sizes in the dynamic Indian market. Further, the technological adoption as well as its effects in terms of application across different sectors are not the same. For instance, the Consulting CEO of Federation of Associations in Indian Tourism and Hospitality shared that adoption of self-check-in and digital keys in hospitality is applicable only to specific hotel-types within the tourism and hospitality industry but may not suit, for instance, the budget hotels or premium establishments that prioritize human interactions. While certain job roles, especially in travel, may see some impact, widespread job reduction due to automation is expected to be lower compared to the knowledge industry, where personalization is highly valued.

Future Expected Technology Adoption

Employers were also inquired not only about the current extent of automation but also about their perceptions regarding the anticipated extent of automation in their organization's business activities in next three years. We found that 52 percent employers perceived the extent of technological adoption to be medium (i.e., 25-50 percent of tasks within jobs to get automated) in the next three years. 40 percent employers expressed that they perceive low extent

of automation or technology usage in the next three years. The sub-sectors level analysis revealed that employers expect low extent of automation in the next three years.

FIGURE 62: SHARE (IN PERCENTAGE) OF EMPLOYERS CITING EXPECTED EXTENT OF AUTOMATION IN THE ORGANIZATION’S BUSINESS ACTIVITY FOR NEXT THREE YEARS

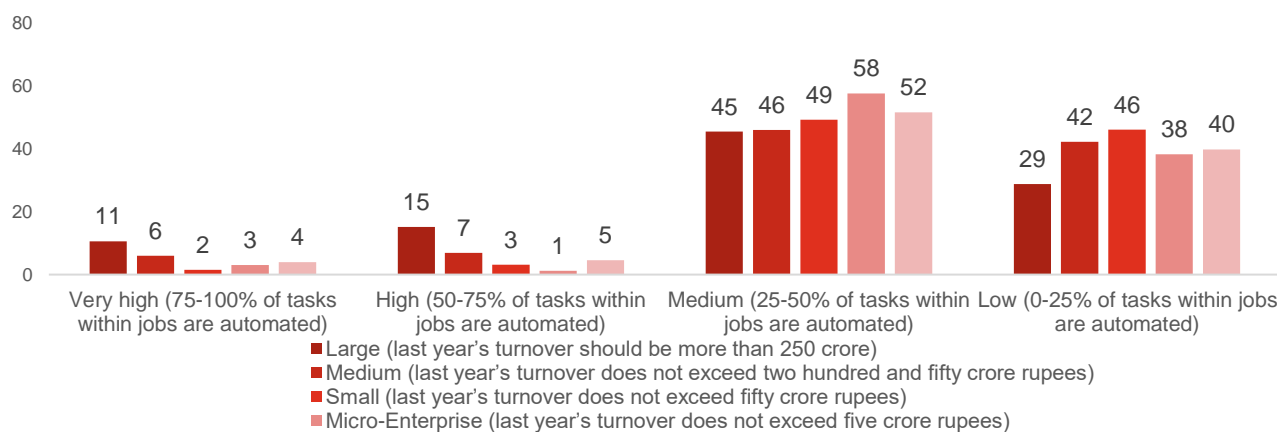


N=553 total

Question: What is the extent of automation expected in your organization's business activity say in next 3 years?

The assessment of how employers perceive the anticipated level of technology adoption and automation, analyzed across the sizes of the firms they belonged to, revealed meaningful insights. It is seen that across the employers in large-sized enterprises, 45 percent employers perceived medium extent (i.e. 25-50 percent of tasks within jobs of their organization can be automated) and 29 percent employers perceived low (i.e. 0-25 percent of tasks within jobs of their organization can be automated) extent of automation. Few employers, specifically 11 percent in large sized enterprises even expected a very high extent i.e., 75-100 percent tasks in jobs within their organizations to get automated in the next three years. Within the small enterprises, 49 percent employers expected medium extent of automation in the next three years, while 46 percent employers expected low automation. This reflects an overall gradual approach for embracing technological advancements within tourism and hospitality industry across firms of various sizes.

FIGURE 63: SHARE (IN PERCENTAGE) OF EMPLOYERS CITING EXPECTED EXTENT OF TECHNOLOGY ADOPTION CURRENTLY IN THE ORGANIZATION’S BUSINESS ACTIVITY

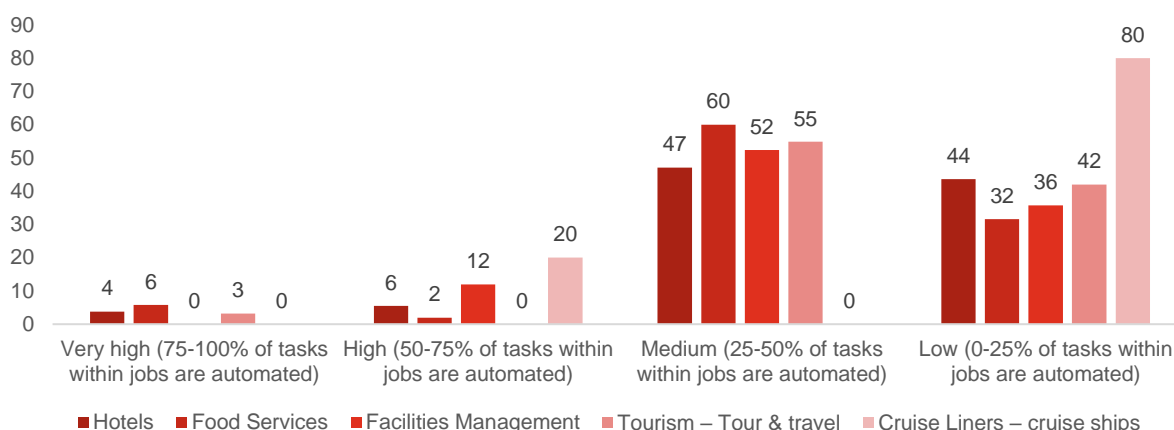


N=553 total; N=243, 128, 116 and 66 for Micro-enterprise, small enterprise, medium enterprise, and large enterprise respectively

Question: What is the extent of automation expected in your organization's business activity say in next 3 years?

The sub-sectoral analysis further revealed valuable insights. Overall, employers anticipated a moderate level of automation (specifically, 25-50 percent of tasks within jobs being automated) over the next three years. At the sub-sectors level, 60 percent employers of food services and 55 percent employers of tourism – tours and travels anticipated a medium extent of automation in their respective organization's business activity in the next 3 years. About 12 percent employers in facilities management expected high degree of automation, i.e., 50-75 percent of tasks within jobs getting automated. In the cruise liners – cruise ships sub-sector, 80 percent of employers perceived a low degree of automation expectation in the next three years.

FIGURE 64: OVERALL EXPECTED EXTENT OF AUTOMATION SUB-SECTOR WISE IN THE ORGANIZATION'S BUSINESS ACTIVITY



N=553 for total; N=289 for hotels, N=155 for Food Services; N=42 for Facilities Management and N=62 for Tours and Travels; N=5 for cruise liners

Question: What is the extent of automation expected in your organization's business activity say in next 3 years?

Mirroring the employers' survey findings, i.e., a medium extent of automation expectation in next three years, our qualitative interactions revealed similar insights. As put forth jointly by the Deputy Director, Director, and Executive Director, Confederation of Indian Industry, the tourism and hospitality sector envisions to reach USD 3 trillion by 2047, aiming for a 15X job multiplier effect, equivalent to around generating 600 million jobs. They further added that Online Travel Agencies (OTAs) are becoming the norm in tourism and travel, and therefore increased focus on experiential personalized services is witnessed. Advances such as AI-driven immersive tourism experiences are emerging, with startups playing a significant role. Even with rise of technological use especially in areas like hotels leveraging customer behavior trends, attracting clientele and optimizing revenue through data analysis, the industry experts do not anticipate complete technology transfer.

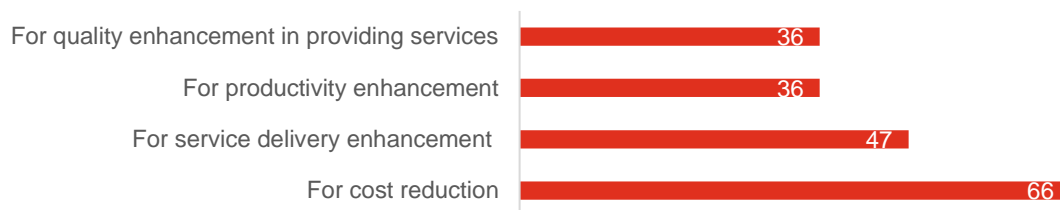
In the wake of the post-COVID-19 pandemic era, there is an increased demand for the digital footprint of industries. Our qualitative interviews revealed that the evolution of travel marketing, propelled by technological advancements is clearly evident. An Executive Committee Member of the Association of Tourism Trade Organizations India shared that digital channels reach 80 percent of travelers. For example, video content is a key tool for effective tourism promotion especially with declining attention span of travelers. Moreover, traditional registers are being replaced by web-based apps, enhancing efficiency in guest tracking. Communication methods have transformed, with a notable shift from emails to WhatsApp messages. The integration of AI tools has proven beneficial for optimizing both marketing strategies and operational processes, resulting in substantial time savings within business operations.

Reasons for Technological Adoption in Current and Future Times

We next inquired the employers about the reasons for introducing technology in their organizations. Overall, 66 percent employers reported cost reduction as a prime reason for technological adoption, followed by service enhancement (47 percent), productivity enhancement (36 percent), and quality enhancement (36 percent). A firm-type level analysis suggested that quality enhancement in service provision emerged as a top reason, cited by 56 percent of employers in organized firms. In contrast, only 23 percent of employers in unorganized firms identified this as a primary reason for utilizing technology. No significant differences were observed across sub-sectors.

We also inquired with the employers about whether there had been an increase in technology adoption in their organization since COVID-19 pandemic. Among the surveyed employers, 93 percent concurred with this scenario. Upon further examination within organized and unorganized firms, we found that 94 percent of employers in organized firms and 92 percent in unorganized firms reported an uptick in technology utilization after the COVID-19 pandemic. Furthermore, assessment at the firm-size level suggested that the highest increase in technology usage since the pandemic was seen for medium-sized enterprises as 97 percent employers expressing support for it, followed by large-sized enterprises with 95 percent of employers accounting for it.

FIGURE 65: SHARE (IN PERCENTAGE) OF EMPLOYERS CITING MAJOR REASONS TO INCREASE THE USE OF TECHNOLOGY BY THE ORGANIZATION IN PRESENT TIMES



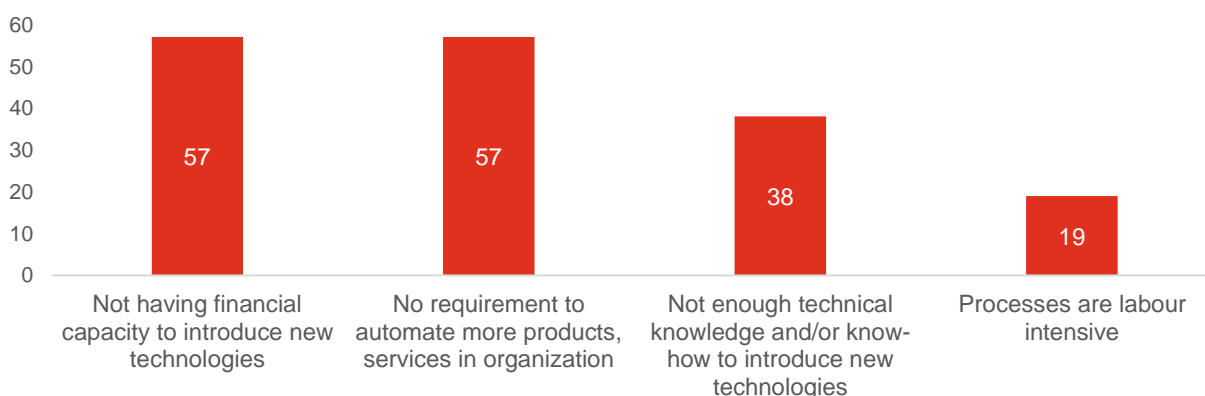
N=553 for total; Note: These are multiple choice questions; responses may not add up to 100 percent.
Question: Why have you introduced the technology in your organization?

Given the importance of changing labour dynamics, work efficiencies and sectoral outputs with the changing technological developments, we inquired from the employers, on whether they intend to increase the use of technology in the next twelve months. We found that 96 percent of employers agreed to increase technology usage. This assessment at the firm level type revealed that unorganized firms’ employers (97 percent) were keener to enhance technology use than organized firms’ employers (95 percent) in the next 12 months. At the sub-sectoral level analysis, more than 90 percent of employers expressed a willingness to increase the use of technology in the next 12 months. This prompted us to ask the reasons for willing to adopt technology and not adopting technology in the next year.

The inquiry with employers on their reasons for introducing technology in the next 1 year revealed that 69 percent of the employers wanted to adopt technologies for cost reduction purposes, followed by 58 percent employers for service delivery enhancements and 48 percent employers for quality enhancements in providing their services. The sub-sectors level analysis revealed varied reasons: employers of Facilities Management and Cruise-Liners sectors cited cost reduction as the primary reason for technology adoption (100 percent and 70 percent, respectively). In contrast, employers in the Food Services and Tourism – Tours and Travels sectors identified service delivery enhancement as the main reason, with 95 percent and 84 percent expressed this rationale, respectively. About 70 percent of employers of Facilities Management and 100 percent employers of Cruise-liners prioritized cost reduction as a reason for wanting to introduce technology, while employers of Food Services (69 percent) and Tourism – Tours and Travels (59 percent) emphasized on service delivery enhancement in their technology adoption motivations.

In our surveyed sample, 57 percent employers did not plan to adopt technology in the next 12 months, due to lack of financial capacity to implement new technologies and a perceived absence of necessity to automate additional products or services within their organizations. Some employers in Hotels (58 percent), Food Services (67 percent), and Facilities Management (50 percent) sub-sectors resisted technology adoption due to financial constraints.

FIGURE 66: TOP REASONS FOR NOT USING TECHNOLOGY IN THE NEXT 12 MONTHS AS EXPRESSED BY SHARE (IN PERCENTAGE) OF EMPLOYERS



N=22 for total; N=12 for hotels, N=6 for Food Services; N=2 for Facilities Management and N=2 for tours and Travels
Note: These are multiple choice questions, responses may not add up to 100 percent.
Question: Why are you not intending to introduce the technology in next 12 months?

Awareness and Usage of Technology in Tourism and Hospitality Sector

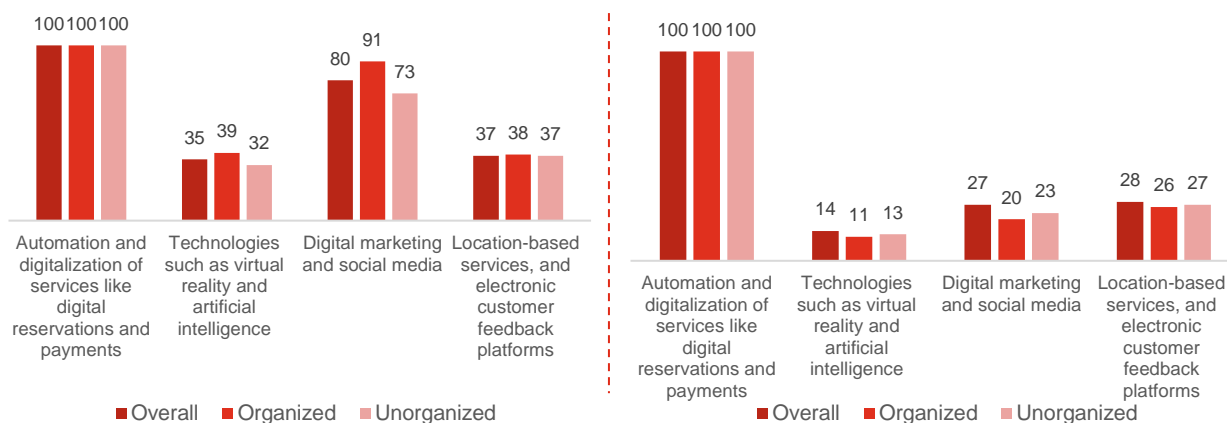
Broad Technological Changes

All employers were aware of ongoing technological changes in the industry, with particularly greater awareness of digital reservations, digital marketing, AR/VR, and the use of location-based services and electronic customer feedback. However, there was a prevalent greater usage of technology only for digital reservations.

We assessed the employers level of awareness of technological changes in the tourism and hospitality industry in particular. We asked the employers if they were aware of technological changes (such as digital marketing, customer chat support, assistance from robots, digital payment modes etc.) in the tourism and hospitality sector. All the employers expressed having an awareness of technological changes within the industry. Next, we specifically inquired with them about the kind of changes that they were aware of taking place within the tourism and hospitality sector. All the employers were aware about the automation and digitalization of services like digital reservations and payments, complementing concierges with chatbots, digital guides, self-check-in kiosks, in-room technology, keyless entry. 80 percent employers were aware about the digital marketing and social media.

In terms of the utilization of these technologies among employers expressing awareness, we inquired with them on the extent of technology usage compared to their awareness of the same. In certain instances, such as usage for digital marketing and social media, while overall 80 percent employers were aware, only 27 percent employers were noted to utilize the same. Likewise, awareness of virtual reality/augmented reality technologies, and location-based services/electronic customer platforms was lower, comprising 35 percent and 37 percent each, respectively. The respective utilizations among employers were even lower as only 14 percent employers and 28 percent employers respectively. There were no significant differences noted across employers from different organization types. For instance, regarding technologies such as virtual reality and artificial intelligence, 39 percent organized firms' employers were aware and only 11 percent of such employers were utilizing the same. Similarly, for unorganized firms' employers, 32 percent employers were aware but only 13 percent of such employers were utilizing them.

FIGURE 67: SHARE (IN PERCENTAGE) OF EMPLOYERS BEING AWARE ABOUT TECHNOLOGIES AND SHARE (IN PERCENTAGE) OF EMPLOYERS USING TECHNOLOGIES IN TOURISM AND HOSPITALITY INDUSTRY



Overall N=553; N for organized = 228; N for unorganized = 325 (for awareness); Overall N=531; N for unorganized = 307; N for organized = 224 (for usage)
 Question: What kind of changes are you aware of that are taking place within tourism and hospitality sector?; Do you use any of these technologies in your organization on a regular basis?

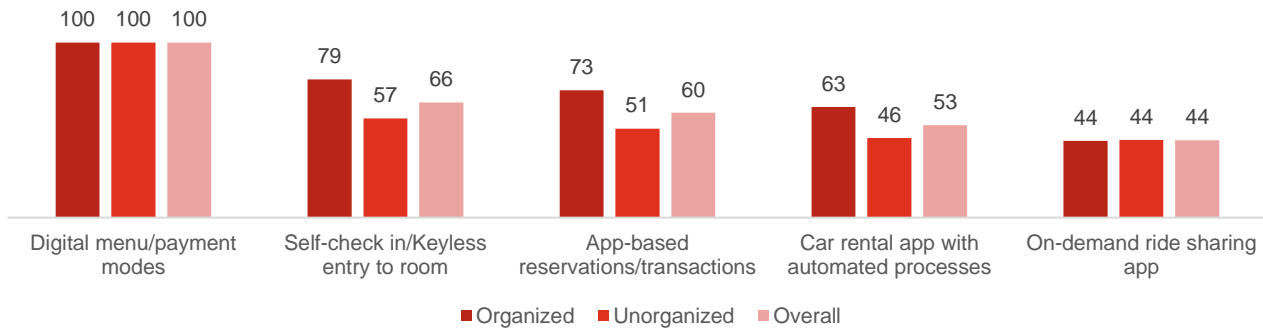
The sub-sector level analysis showed that there were no significant differences observed, except for the fact that employers of hotels and, tourism and travel subsectors tend to use certain technologies more extensively than other subsectors. For instance, 27 percent of employers in the hotels, 20 percent employers in facilities management reported using car rental app, compared to 14 percent employers in tourism – tour and travel sub-sector and 10 percent of food service employers. Digital reservations, on the other hand, are employed almost uniformly across all types of employers.

Specific Technological Changes

Given the different types of specific technologies becoming relevant for any industry over time, including the tourism and hospitality industries, we inquired with the employers on their extent of awareness and usage of specific types of

technologies in their respective sub-sectors and organization types. All employers were familiar with digital menu and payment modes. However, for self-check-ins/keyless entry to rooms, and app-based reservations and transactions, only 79 percent, 73 percent of employers, respectively, reported having knowledge of these technologies. There were certain differences observed among the employers surveyed belonging to different organization types. For instance, regarding app-based reservations/transactions, 60 percent unorganized firms' employers were aware compared to 51 percent organized firms' employers. For car rental app usage with automated processes, only 46 percent organized firms' employers were aware compared to 53 percent unorganized firms' employers.

FIGURE 68: SHARE (IN PERCENTAGE) OF EMPLOYERS BEING AWARE ABOUT SPECIFIC TECHNOLOGIES IN TOURISM AND HOSPITALITY INDUSTRY

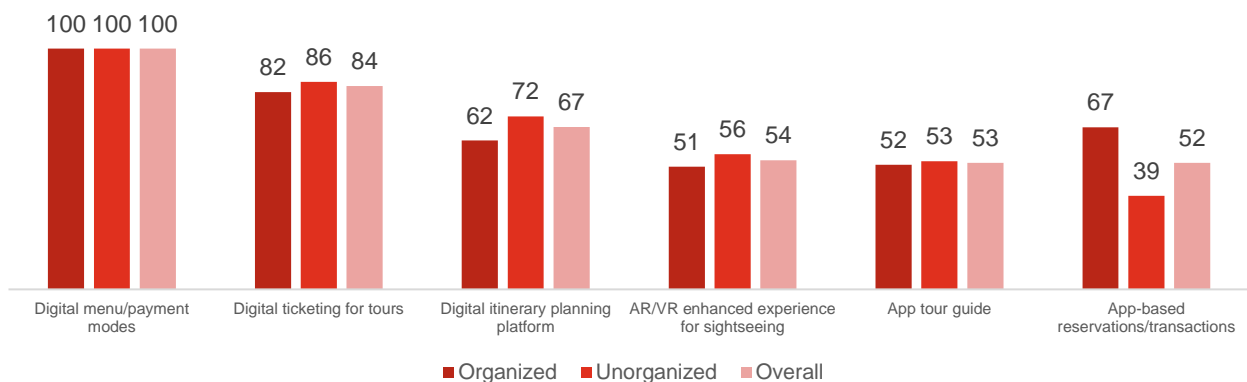


Overall N=553; N for organized = 228; N for unorganized = 325; Only top 5 choices are shown. Responses may add up more than 100% since this was a multiple-choice question.

Question: Are you aware about these specific technologies being used in tourism and hospitality sector?

When examining the adoption of technology across various firm sizes within the surveyed industry, it was seen that awareness and utilization of all these technologies were notably lower among micro-enterprises employers. For example, regarding app-based reservations and transactions, only 49 percent of employers in micro scale firms shared being aware, which was lower than awareness among large-scale enterprise employers (74 percent), small scale enterprise employers (68 percent) and medium-scale enterprise employers (66 percent). Across the different types of organizations, no significant differences were observed from employers surveyed. For instance, regarding digital ticketing for tours, 86 percent organized firms' employers cited of using it compared to 84 percent unorganized firms' employers.

FIGURE 69: SHARE (IN PERCENTAGE) OF EMPLOYERS USING SPECIFIC TECHNOLOGIES IN TOURISM AND HOSPITALITY INDUSTRY



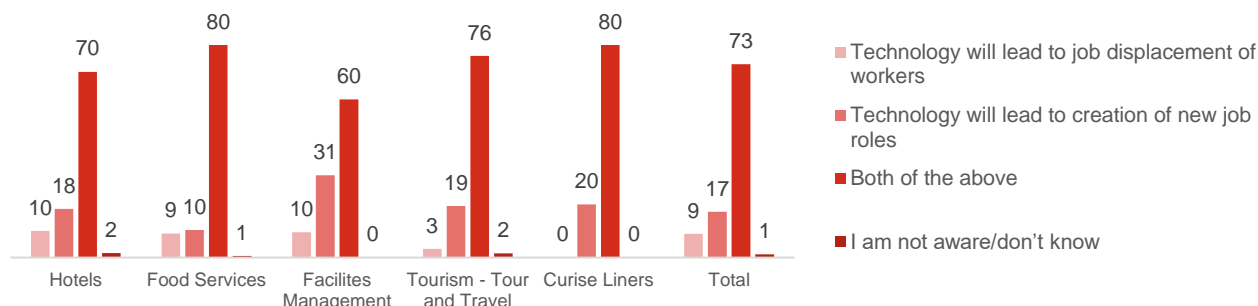
Overall N=553; N for organized = 228; N for unorganized = 325; Only top 5 choices are shown. Responses may add up more than 100% since this was a multiple-choice question.

Question: Are you aware about these specific technologies being used in tourism and hospitality sector?

Employers foresee technology causing both job displacement and creation, with larger and medium-sized employers particularly anticipating the emergence of new roles. Employers had also experienced the impact of technology in the last three years, notably marked by job losses among less- and medium-skilled workers.

We further asked the employers in what ways they think employment in the tourism and hospitality sector will change in the future, say in the next 3 years. About 73 percent of employers believed that technology would lead to both the displacement and creation of job roles. Large-sized enterprise employers (23 percent) and medium-sized enterprise employers (31 percent) in particular, strongly believed that the emergence of new job roles would be a key outcome of technological advancements.

FIGURE 70: SHARE (IN PERCENTAGE) OF EMPLOYERS BELIEVING IN IMPACTS OF TECHNOLOGY IN TOURISM AND HOSPITALITY SECTOR

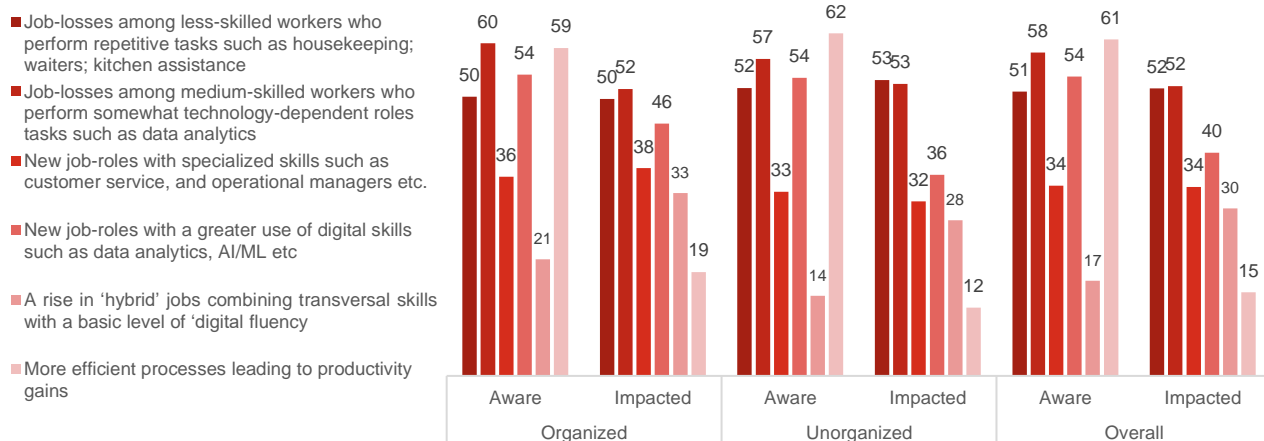


N=553 for total; N=289 for hotels, N=155 for Food Services; N=42 for Facilities Management and N=62 for Tours and Travels; N=5 for cruise liners

Question: In what ways do you think employment in the tourism and hospitality sector will change in future say in next 3 years?

For those employers who remarked that they expect technology will lead to the displacement of workers, we asked their perceptions on the anticipated impact of technology in the future in the next 3 years. We further asked employers if their organization had been impacted by any significant changes in the past 3 years. Regarding awareness of technological impact leading to job losses among less skilled workers, overall, 51 percent of employers were aware while 52 percent of employers were impacted by job losses issue among such workers. For medium-skilled workers, overall, 58 percent of employers shared that they were aware of technology impact leading to job losses while 52 percent employers were impacted by the issue of job losses of such workers due to technology changes. This trend signifies the growing influence of technology in the tourism and hospitality sector, a realization that employers across all surveyed sub-sectors are progressively acknowledging.

FIGURE 71: SHARE (IN PERCENTAGE) OF EMPLOYERS BEING AWARE AND BEING IMPACTED BY TECHNOLOGY IN TOURISM AND HOSPITALITY SECTOR



Overall N=553

Question: According to you, what is the anticipated impact of technology in future in next 3 years? And has your organization been impacted by any of the following in the recent 3 years?

Employers in the sector foresee key labor-intensive roles like assistant chefs and barista executives continuing, albeit with a slight chance of displacement. Meanwhile, there is an expected rise in demand for roles related to digital marketing and revenue management.

We additionally explored the viewpoints of employers on the anticipated high-demand job positions over the next five years, influenced directly or indirectly by technological advancements within their specific sub-sectors. The future job roles anticipated as crucial for employers in the hotels sub-sector were revealed to be banquet manager (operations) staff and assistant chef, expressed by 45 percent and 44 percent of respective employers. In the food services and cruise-liners cruise ships sub-sectors, assistant chef (47 percent and 100 percent respectively) and barista executive (41 percent and 80 percent respectively) are the job roles employers expect to be in high requirement, in each of these two sub-sectors. In the facilities management sub-sector, cafeteria supervisor and facility manager – staff were cited as highly demanded job roles, as expected by 76 percent and 50 percent employers, respectively. For the tourism- tour and travels sub-sector, job roles of meet and greet officer and adventure travel guide were accounted for by 65 percent and 53 percent employers, respectively.

TABLE 14: TOP 5 JOB ROLES TO BE IN DEMAND IN THE NEXT FIVE YEARS, DUE TO ADVANCEMENT IN TECHNOLOGY, SUB-SECTOR

Sub-Sector	Job Roles	Overall (in %)
Hotels (n = 289)	Banquet Manager (Operation) - staff	45
	Assistant Chef	44
	Bartender	40
	Barista Executive	21
	Chef de Partie	29
Food Services (n=155)	Assistant Chef	47
	Barista Executive	41
	Chef de Partie	41
	Counter Sales Executive-Tourism and Hospitality	3
	Demi Chef De Partie	5
Facility Management (n =42)	Cafeteria Supervisor	76
	Facility Manager - staff	50
	Facility Management Executive	48
	Multi - Purpose Associate	45
	Pantry Associate	45
Tourism – Tour and Travel (n =62)	Meet and Greet Officer	65
	Adventure Travel Guide	53
	Assistant Rafting Guide	48
	Camp Helper	44
	Ground Crew Chief	39
Cruise Liners – Cruise Ships (n=5)	Assistant Chef	100
	Banquet Manager (Operation) - staff	80
	Barista Executive	80
	Demi Chef De Partie	20
	Commis Chef	20

N=553 for total; N=289 for hotels, N=155 for Food Services; N=42 for Facilities Management and N=62 for Tours and Travels; N=5 for cruise liners
Question: According to you, what are the top 5 job roles in your organization that will be in demand in the next five years, due to advancement in technology?

According to our qualitative interviews with training service providers, specific job roles within sub-sectors are emerging due to changing customer preferences, the demand for healthy food, and technological advancements. For instance, training institutions mentioned that the job role of multi-cuisine cook is expected to be in high demand in India. The qualitative interviews also noted the importance of aligning academic and training programs with employers demands for newer job roles. Senior representatives of Industry Associations, such as the Director of the Indian Federation of Culinary Associations (IFCA), pointed out the increasing importance of incorporating technology, including AI, across different sub-sectors. For example, the emergence of scientific gastronomy courses in institutes focuses on improving food quality and customer experience. Educational institutions also highlighted the need for adapting teaching methods to enhance technological understanding and equip students with various skills for

emerging job roles. For instance, Manipal University offers students opportunities to manage commercial restaurants, helping them learn essential skills such as menu planning, digital marketing, team building, and event management. Qualitative interviews also emphasized the growing importance of roles in experiential tourism, wellness, and care, such as ayurveda and yoga. Roles involving virtual tours and digital integration are gaining significance and must be included in academic curricula, as per the educational institutions. Further, the Vice President of Industry and Academia Collaboration at the National Skill Development Corporation highlighted that a strategic initiative to align education with evolving technological advancements is in progress. This initiative promotes courses in entrepreneurship, finance, and revenue management to help adapt to changing market dynamics. The introduction of hotel consultancy courses further aims to align curricula with global standards, focusing on developing culinary skills in foreign cuisines and proficiency in foreign languages.

5. Future Manpower Requirement in the Tourism and Hospitality Sector

To understand the overall labor demand in the tourism and hospitality sector for 2024-2028, we adopted a sectoral employment elasticity approach, where employment elasticity measures the percentage change in employment associated with a one percentage point change in economic growth, i.e., gross value added (GVA)⁹². To forecast future labor demand, we utilized the employment and GVA data available between 2011-12 and 2022-23. The main sources of data on sector-specific employment and GVA included the 68th round of the Employment and Unemployment Survey by the National Sample Survey Organization (NSSO), World Development Indicators, United Nations Population Fund's Population Projections, various rounds of unit-level data from the Periodic Labour Force Survey (2017-2022), and the latest data from the Reserve Bank of India's KLEMS database.

To project future demand, it was essential to understand the average growth rate of GVA from 2024 to 2028 and the changes in employment and GVA from 2019 to 2011. We deliberately excluded the years 2020 and 2021, affected by the COVID-19 pandemic, from all calculations to avoid underestimating GVA and employment estimates. Using PLFS 2021-22 data, we estimate that the tourism and hospitality sector employed 10.5 million individuals aged 15 years and above in 2022, generating a GVA of INR 12,171 million⁹³. Based on these calculations, we estimated an employment elasticity of 0.97, i.e., for every one percentage point change in GVA within the tourism and hospitality sector, employment is expected to change by 0.97 percentage points in the same direction. By extrapolating the Ministry of Statistics and Programme Implementation's GVA data until 2021, we projected the future (2022-2028) average growth rate of GVA for the tourism and hospitality industry to be 5.9 percent.

Using the described methodology, our estimates indicate that the tourism and hospitality sector employed 11.1 million persons in 2023 and will further require a total workforce of 11.8 million individuals (aged 15 years and above) in 2024. This figure is anticipated to increase to 14.8 million by 2028, exhibiting a CAGR of 16.5 percent. The primary contributor to the total workforce demand will be the accommodation and food services activities, engaging around 93 percent of the workforce, i.e., 11 million individuals (aged 15 years and above) in 2024 which is further expected to increase to 13.8 million in 2028. Following next is the administrative and support service activities subsector, with a labor demand of 0.6 million in 2024, demonstrating a percentage increase of around 33.3 percent to nearly 0.8 million in 2028.

In terms of incremental demand, we estimate that the total incremental demand between 2024-2028 is projected to be 3 million, of which 93 percent (i.e., 2.8 million) is expected to come from accommodation and food services alone.

The table below provides a forecast for employment and incremental labour demand within the overall tourism and hospitality sector and the identified subsectors between 2024-2028.

TABLE 15: PROJECTED LABOUR DEMAND (AGED 15+ YEARS) IN MILLIONS (2024-2028)

Sector and sub-sectors	2024		2025		2026		2027		2028		Total incremental demand (2024-2028)
	Employment	Employment	Incremental demand	Employment	Incremental demand	Employment	Incremental demand	Employment	Incremental demand		
Tourism and Hospitality	11.8	12.5	0.7	13.2	0.7	14.0	0.8	14.8	0.8	3.0	
Accommodation and Food Services	11.0	11.7	0.6	12.4	0.7	13.1	0.7	13.8	0.8	2.8	

⁹² Tourism and hospitality sector's sub-sectors are defined as (i) accommodation and food services; (ii) administrative and support service activities; (iii) cruise liners, and (iv) arts, entertainment, and recreation.

⁹³ Ministry of Statistics and Programme Implementation. (n.d.). Retrieved from: <https://mospi.gov.in/data>

Sector and sub-sectors	2024		2025		2026		2027		2028		Total incremental demand (2024-2028)
	Employment	Employment	Incremental demand	Employment	Incremental demand	Employment	Incremental demand	Employment	Incremental demand		
Administrative and Support Service Activities	0.60	0.63	0.03	0.67	0.04	0.71	0.04	0.75	0.04	0.15	
Cruise Liners	0.12	0.13	0.01	0.13	0.01	0.14	0.01	0.15	0.01	0.03	
Arts, Entertainment and Recreation	0.06	0.06	0.00	0.07	0.00	0.07	0.00	0.08	0.00	0.02	

Note: The sub-sector employment and incremental demand numbers have been rounded off to two-decimal places and therefore do not add up exactly to the total of 'tourism and hospitality' sector.

Source: Authors' calculation using data World Development Indicators, United Nations Population Fund's Population Projections, and various rounds of unit-level data from the Periodic Labour Force Survey (2017-2022).

The following definition of the sector and sub-sectors has been used:

- **Accommodation and food services** (NIC code 5510 within code I) included hotels and motels, inns, resorts providing short term lodging facilities; includes accommodation in house boats; provision of short-term lodging facilities to members of a particular organization such as govt. guest houses; provision of short stay accommodation n.e.c. (e.g., holiday homes, private guest houses etc.); operation of canteens or (e.g. for factories, offices, hospitals or schools) on a concession basis (NIC code 5610); Restaurants without bars (NIC code 5621); cafeterias, fast-food restaurants and other food preparation in market stalls (NIC code 5629), and ice cream mobile vendors, mobile food carts (NIC code 5630).
- **Administrative and support service activities** (NIC code N) included travel agency activities (NIC code 7911); tour operator activities (NIC code 7912); and other reservation service and related activities (NIC code 7990)
- **Cruise Liners** (NIC code H) included sea and coastal ferry service; sea and coastal water cruise, water taxis and other sightseeing boats; sea and coastal long distance water transport; other sea and coastal water transport n.e.c (NIC code 5011); sea and coastal freight water transport; storage of freight; harbour operation and other auxiliary activities such as docking, pilotage; lighterage, vessel salvage; cargo handling; sea and coastal freight water transport; (NIC code 5012); inland passenger water transport; river ferry service; river cruise, water taxi, boat services; Long distance river water transport; Other inland water transport n.e.c. (NIC code 5021)
- **Arts, entertainment and recreation** (NIC code R) included activities of amusement parks and theme parks (NIC code 9321) and other amusement and recreation activities n.e.c. (NIC code 9329)

To understand the need for workers across different skill categories, we categorize the additional workforce requirement based on self-reported skill-level data from surveyed youth. According to the survey findings, 36 percent of wage and salaried youth classify themselves as skilled workers, 36 percent as semi-skilled and 30 percent as unskilled workers⁹⁴. This indicates that out of 3 million additional workforce needed until 2028, approximately 1.1 million will be skilled, another 1.1 million will be semi-skilled, and the remaining 0.8 million will be unskilled.

Further, we conducted a state-wise analysis to understand how the incremental manpower demand of 3 million (from 2024-2028) is divided across the country. The incremental manpower demand across geography has been divided into 4 categories, i.e., High (9-11 percent share), Medium (4-8 percent share), Low (1-3 percent share), and lowest (<1 percent share). The key highlights of the incremental manpower demand across the states in the country are as follows:

- **High share of incremental demand:** Maharashtra (11 percent), West Bengal (11 percent) and Tamil Nadu (10 percent) account for the highest share of incremental human resource demand.
- **Medium share of incremental demand:** Uttar Pradesh (8 percent), Karnataka (7 percent), Andhra Pradesh (7 percent), Bihar (5 percent), Gujarat (4 percent), Odisha (4 percent), Rajasthan (4 percent), Kerala (4 percent), and Madhya Pradesh (4 percent) fall under this category together constituting 49 percent of the total incremental manpower requirement.

⁹⁴ Unskilled work is defined as work that requires little or no independent judgement /previous experience although familiar with occupational environment; Semi-skilled work is defined as work that has a well-defined nature of work wherein the major requirement is not for judgement or skill but for proper discharge of duties; skilled work is defined as work that requires exercising considerable independent judgement and of discharge of duties with responsibilities.

- **Low share of incremental demand:** Punjab (3 percent), Assam (3 percent), Telangana (3 percent), Jharkhand (2 percent), Haryana (2 percent), Chhattisgarh (1 percent), Delhi (1 percent), Uttarakhand (1 percent), Jammu and Kashmir (1 percent), and Himachal Pradesh (1 percent) fall under this category together constituting 17 percent of the total incremental manpower requirement.

The table below presents the incremental manpower demand by geography for the 2024-2028 period:

TABLE 16: INCREMENTAL MANPOWER DEMAND DIVIDED ACROSS STATES (2024-2028)

Name of the State	Incremental manpower demand		State category
	(in absolute numbers)	(in percentage)	
Maharashtra	339,653	11%	High
West Bengal	321,125	11%	High
Tamil Nadu	305,885	10%	High
Uttar Pradesh	254,074	8%	Medium
Karnataka	203,875	7%	Medium
Andhra Pradesh	195,477	7%	Medium
Bihar	163,064	5%	Medium
Gujarat	132,835	4%	Medium
Odisha	132,694	4%	Medium
Rajasthan	130,866	4%	Medium
Kerala	123,512	4%	Medium
Madhya Pradesh	121,049	4%	Medium
Punjab	90,833	3%	Low
Assam	82,303	3%	Low
Telangana	76,448	3%	Low
Jharkhand	56,559	2%	Low
Haryana	44,822	1%	Low
Chhattisgarh	41,113	1%	Low
Delhi	38,597	1%	Low
Uttarakhand	35,579	1%	Low
Jammu and Kashmir	22,139	1%	Low
Himachal Pradesh	21,798	1%	Low
Meghalaya	14,632	0%	Lowest
Goa	14,023	0%	Lowest
Andaman and Nicobar Island	6,012	0%	Lowest
Tripura	5,202	0%	Lowest
Daman and Diu	5,187	0%	Lowest
Puducherry	4,372	0%	Lowest
Sikkim	3,838	0%	Lowest
Chandigarh	3,692	0%	Lowest

Name of the State	Incremental manpower demand		State category
	(in absolute numbers)	(in percentage)	
Manipur	3,594	0%	Lowest
Mizoram	1,810	0%	Lowest
Ladakh	1,644	0%	Lowest
Arunachal Pradesh	869	0%	Lowest
Nagaland	644	0%	Lowest
Lakshadweep	180	0%	Lowest
Total	3,000,000	100%	-

Note: The percentages have been rounded to 0 decimal places. When percentages are shown as 0, it means the share was approximately 0, for example around 0.1 or 0.2 percentage.

Source: Authors calculation using World Development Indicators, United Nations Population Fund's Population Projections, various rounds of unit-level data from the Periodic Labour Force Survey (2017-2022).

6. Potential Trainable Pool in the Tourism and Hospitality Sector

To understand the pool of trainable young (aged between 15-34 years) manpower and the consequent training gap in the tourism and hospitality sector, we analyzed periodic labour force data from 2022-23, utilized data from our youth survey, and gathered information from multiple government sources. This enabled us to ascertain the count of young individuals (aged 15-34 years) who are either trained or are interested in receiving training within the tourism and hospitality sector.

To estimate the potential pool of young individuals available to be trained and identify the resultant training gap, we first estimated the number of unemployed young individuals who were unemployed but were available for work across all the sectors. Subsequently, we narrowed our focus to assess the availability of such youth, specifically within the tourism and hospitality sector. Next, using PLFS 2022-23 data, we determined the proportion of young individuals who had undergone formal training in tourism and hospitality sector, thus providing an estimate of those available for employment but lacking formal training. This analysis enabled us to identify the trainable pool of youth within the tourism and hospitality sector.

Using the described methodology, we estimated that in 2022, India held a pool of 400 million individuals who were aged between 15-34 years⁹⁵. Among such individuals, 180 million were part of the labor force, comprising both the unemployed but available to work and the employed⁹⁶. Out of this labor force, 160 million were employed and were working across various sectors⁹⁷. This indicates that around 20 million individuals aged 15-34 years were unemployed but were available to work across various sectors.

Given the absence of direct data regarding young individuals who were unemployed yet seeking employment specifically within the tourism and hospitality sector, we turned to insights from our youth survey. One of the key focus of the survey was on the share of individuals classified as NEET (Not in Education, Employment, or Training) who expressed a willingness to work in tourism and hospitality sector. Section 3.1 of the report revealed that 61 percent of surveyed NEET individuals were open to employment across any sector, with 47 percent expressing a preference for the tourism and hospitality sector. This translates to 29 percent of NEET youth being available for employment within the tourism and hospitality sector. Consequently, out of the 20 million individuals aged 15-34 years who expressed readiness for employment across various sectors, approximately 5.8 million were available for employment specifically within the tourism and hospitality sector.

Continuing our analysis, we estimated the proportion of young individuals who had received formal training in the tourism and hospitality sector using PLFS 2022-23 data. The findings reveal that only 1 percentage of individuals aged 15-34 years have undergone formal training specifically within this sector. This implies that out of the 5.8 million individuals, only 50,000 young individuals have received formal training in the sector, leaving behind a pool of 5.7 million youth aged between 15-34 years who still possess the potential to undergo formal training over the next 5 years. This pool of individuals includes the youth who can be trained for hospitality, facility management, tour and travels, cruise liners, food services, and other allied services such as aviation, drivers, home delivery, retail, sales and management etc.

This group of 5.7 million young people, who could potentially be targeted for training over the next five years, can assist in fulfilling the workforce needs of 3 million by 2028.

TABLE 17: ESTIMATION OF TRAINABLE MANPOWER POOL OVER THE NEXT 5 YEARS

Particulars	Numbers (in millions)/%
Persons aged between 15-34 years	400

⁹⁵ National Statistical Office. (2021). Periodic Labour Force Survey (July 2022-June 23). Ministry of Statistics and Programme Implementation, Government of India.

Retrieved from: https://www.mospi.gov.in/sites/default/files/publication_reports/AR_PLFS_2022_23N.pdf?download=1.

⁹⁶ Based on the data extracted from the PLFS 2022-23, it is observed that the Labor Force Participation Rate (LFPR) for individuals aged 15-29 years stands at 45 percent. This rate is presumed to remain consistent across the broader age bracket of 15-34 years.

⁹⁷ Based on the data extracted from the PLFS 2022-23, it is observed that the Worker Population Ratio (WPR) for individuals aged 15-29 years stands at 40 percent. This rate is presumed to remain consistent across the broader age bracket of 15-34 years.

Particulars	Numbers (in millions)/%
Persons aged between 15-34 years who are in labour force (unemployed but available to work and the employed)	180
Persons aged between 15-34 years who are employed across various sectors	160
Persons aged between 15-34 years who are unemployed but available to work across various sectors	20
Share (in percentage) of NEET youth aged between 15-34 years willing to work in tourism and hospitality sector	29%
Persons aged between 15-34 years who are unemployed but available to work in tourism and hospitality sector	5.8
Share (in percentage) of youth aged between 15-34 years who has undergone any form of formal training within tourism and hospitality sector in 2022	1%
Number of persons aged between 15-34 years who can potentially be trained to work in tourism and hospitality sector until 2028	5.7 million

Source: Authors calculation using unit-level data from the Periodic Labour Force Survey (2022), Youth Survey with 10,158 respondents, Census 2011

Further, we conducted a state-wise analysis to understand which states have the maximum potential to train the youth who are interested in being trained in tourism and hospitality industry. The potential trainable pool across geography has been divided into 4 categories, i.e., High (8-16 percent share), Medium (5-7 percent share), Low (1-4 percent share), and lowest (<1 percent share). The key highlights of the potential trainable pool across the states in the country are as follows:

- **High share of potential trainable pool:** Uttar Pradesh (16 percent), Maharashtra (10 percent), Bihar (8 percent) and West Bengal (8 percent) account for the highest share of potential trainable pool.
- **Medium share of potential trainable pool:** Andhra Pradesh (7 percent), Tamil Nadu (6 percent), Madhya Pradesh (6 percent), Rajasthan (6 percent), Karnataka (5 percent), and Gujarat (5 percent) fall under this category together constituting 35 percent of the total potential trainable pool.
- **Low share of potential trainable pool:** Odisha (3 percent), Assam (3 percent), Jharkhand (3 percent), Kerala (3 percent), Punjab (2 percent), Haryana (2 percent), Chhattisgarh (2 percent), Delhi (2 percent), Jammu and Kashmir (1 percent), Uttarakhand (1 percent), and Himachal Pradesh (1 percent) fall under this category together constituting 22 percent of the total potential trainable pool.

The table below presents the distribution of potential trainable pool by geography:

TABLE 18: POTENTIAL TRAINABLE POOL IN TOURISM AND HOSPITALITY ACROSS STATES

Name of the State	Youth aged 15-34 years who can be potentially trained		State category
	(in absolute numbers)	(in percentage)	
Uttar Pradesh	907,269	16%	High
Maharashtra	547,921	10%	High
Bihar	446,367	8%	High
West Bengal	438,987	8%	High
Andhra Pradesh	415,029	7%	Medium
Tamil Nadu	350,581	6%	Medium
Madhya Pradesh	337,950	6%	Medium
Rajasthan	315,724	6%	Medium
Karnataka	299,840	5%	Medium
Gujarat	295,413	5%	Medium
Odisha	195,728	3%	Low
Assam	150,577	3%	Low
Jharkhand	149,558	3%	Low
Kerala	144,605	3%	Low
Punjab	135,879	2%	Low

Name of the State	Youth aged 15-34 years who can be potentially trained		State category
	(in absolute numbers)	(in percentage)	
Haryana	124,196	2%	Low
Chhattisgarh	118,351	2%	Low
Delhi NCR	88,615	2%	Low
Jammu and Kashmir	59,658	1%	Low
Uttarakhand	47,569	1%	Low
Himachal Pradesh	33,165	1%	Low
Tripura	18,222	0%	Lowest
Manipur	14,272	0%	Lowest
Meghalaya	13,664	0%	Lowest
Nagaland	10,088	0%	Lowest
Goa	7,115	0%	Lowest
Arunachal Pradesh	6,884	0%	Lowest
Puducherry	6,322	0%	Lowest
Chandigarh	5,659	0%	Lowest
Mizoram	5,562	0%	Lowest
Sikkim	3,371	0%	Lowest
Andaman and Nicobar Islands	2,088	0%	Lowest
Dadra and Nagar Haveli	1,918	0%	Lowest
Daman and Diu	1,536	0%	Lowest
Lakshadweep	318	0%	Lowest
Total	5,700,000	100%	-

Note: The percentages have been rounded to 0 decimal places. When percentages are shown as 0, it means the share was approximately 0, for example around 0.1 or 0.2 percentage.

Source: Authors calculation using unit-level data from the Periodic Labour Force Survey (2022), Youth Survey with 10,158 respondents, and Census 2011 data

Examining the broader training requirements of individuals in the tourism and hospitality sector, the Indian government has implemented several measures to educate people of all age groups (as shown in the below table). For instance, by 2022, approximately 0.3 million individuals had undergone training through various short-term training programs, and 62,086 apprentices had been registered until 2023-24 in the tourism and hospitality sector⁹⁸. Additionally, 72,637 students and 9755 students were enrolled in bachelor's, masters' and diploma courses in tourism and hospitality offered by the All-India Survey on Higher Education (AISHE) and the All-India Council for Technical Education (AICTE) approved institutions⁹⁹. Furthermore, 11,604 seats were allocated for the Industrial Training Institutes students pursuing various trades related to tourism and hospitality until 2023¹⁰⁰. Overall, nearly 5 lakh individuals are being trained in the tourism and hospitality ecosystem. However, despite the government's efforts, there remains a scope of training 5.7 million youth aged between 15-34 years who are available to work within tourism and hospitality sector, as shown in table 19.

TABLE 19: NUMBER OF INDIVIDUALS TRAINED IN TOURISM AND HOSPITALITY SECTOR ACROSS VARIOUS GOVERNMENT INITIATIVES

Particulars	Number of individuals enrolled/trained
Number of people trained in short-term training courses in tourism and hospitality sector in 2021-22	322,056
Apprentices enrolled in tourism and hospitality sector until 2023-24	62,086

98 National Apprenticeship Scheme Dashboard. Retrieved from: <https://dashboard.apprenticeshipindia.org/>.

99 All India Survey on Higher Education. (2021). AISHE 2020-21: Final Report. Ministry of Education, Government of India. Retrieved from: <https://aishe.gov.in/aishe/viewDocument.action?documentId=353>; All India Council for Technical Education. (2024). AICTE Dashboard 2023-24. Ministry of Education, Government of India. Available at: <https://app.powerbi.com/view?r=eyJrjoiZmJkZmMwNDYtNzJyY00N2FILThjMjAtZGFhZGZlODYyOTczliwidCl6ImVkJYjFjNjA2LWJlMzYtNDZlZi04ODRlLTJlMGMxNjY2OGU4NiJ9>

100 National Council for Vocational Training. (n.d.). Dashboard - Trainees Certified. Retrieved from: <https://www.ncvtmis.gov.in/Pages/Dashboard/DashboardTraineesCertified.aspx>

Particulars	Number of individuals enrolled/trained
Total enrolled students in various educational institutions approved by All India Survey on Higher Education (AISHE) in 2021-22	72,637
Total enrolled students in various educational institutions approved by All India Council for Technical Education (AICTE) in 2023-24	9,755
Number of seats available in trades related to tourism and hospitality across various ITI in India in 2023	11,604
Total number of individuals trained in tourism and hospitality sector across various government initiatives until 2023-24	478,138

Note: We have used the latest year's data as per the availability

Source: National Apprenticeship Scheme Dashboard; All India Survey on Higher Education Final Report (2021); All India Council for Technical Education Dashboard 2023-24; National Council for Vocational Training Dashboard

7. Conclusion and Policy Recommendations

The tourism and hospitality sector stands as the major contributor to India's GDP and employment. The sector has experienced a consistent growth, fueled by factors such as increased international travel, expanding consumer demand, and a rebound from pandemic-related disruptions. As a result, the tourism and hospitality industry emerged as the second most substantial contributor to India's services sector, trailing only behind the IT-BPM sector. Further, emerging trends such as adventure tourism, wellness, medical tourism, and cruise tourism, coupled with technological advancements are transforming the industry's employment and skilling landscape resulting in an increased requirement of skilled workers. However, currently, only one percent of the workforce in this sector has undergone any form of formal training, highlighting a training and skills gap. In this report, we explored the current and changing skill needs based on insights from both youth and industry experts. We explored their opinions on training needs and how they foresee technology impacting the industry. Additionally, we estimated the future workforce needs within the industry.

The study followed a four-step analysis process, starting with a review of existing literature on economic trends, sector-specific indicators (such as GDP contribution, growth patterns, COVID-19 impact, and employment), and the skilling ecosystem. Secondary research focused on understanding the changing nature of the tourism and hospitality industry. Primary research involved engaging with employers to understand their perspectives on skill requirements and drawing the aspirations of young individuals entering or already in the workforce. An in-depth qualitative consultations with various stakeholders, including high-level ministries, educational institutions, training service providers, and industry associations were also conducted. Finally, data from periodic labor force surveys, Census 2011, World Development Indicators, United Nations Fund for Population Projections data were analyzed to forecast manpower needs within the industry. The synthesis of these findings resulted in this comprehensive skill gap report.

The survey findings indicated that the youth, whether currently involved in or open to engaging with the tourism and hospitality sector, showcased a strong inclination toward pursuing either salaried positions or self-employment or entrepreneurial businesses within the industry. Personal interests, alignment with educational qualifications, and a desire for a diverse and dynamic work environment emerged as key reasons encouraging individuals towards the tourism and hospitality industry. However, among those already employed in the sector, wages significantly impacted job satisfaction or dissatisfaction, resulting in a decision to continue or discontinue the job. Consequently, low wages, according to employers, stood out as a primary reason for the high attrition rate across organizations in the industry. In addressing the challenges of a high attrition rate and wage-related job satisfaction concerns among workers, employers expressed a willingness to offer wage premiums to their workers. Wage premium provision emerged as a dependent factor on workers' technical skills or prior hands-on training experience.

The findings of employer surveys highlighted a core challenge: despite common recruitment practices adopted by tourism and hospitality colleges, which emphasize practical teaching methods and soft skills, employers had expressed concerns regarding the lack of essential skills, particularly soft skills, among entry-level workers. Even with pre-placement activities such as mock interviews, regular tests and preparation efforts by the educational institutions, employers observed a lack of essential skills such as written and verbal communication, literacy, numeracy, and job-relevant language skills in these workers. Employers found a lack of problem-solving skills, especially in customer-facing roles, despite training from educational institutions. Youth also understood the importance of soft skills such as communication and were willing to be trained for such skills. However, only a few large employers conduct training in these essential soft skills.

Additionally, according to the employers and the youth, tourism and hospitality sector is facing several challenges. These include issues like non-alignment with international job role standards, concerns about underpayment in the hotel industry, and difficulties in aligning the skilling requirements between industry and academia. Only large chain employers offer on-the-job training to their workers, while smaller businesses lack both training and certification processes. Moreover, educational institutions face challenges in keeping up with the evolving skilling needs of the tourism and hospitality sector, leading to a shortage of training opportunities.

In view of technological advancements, employers have automated fewer than 25 percent of tasks in their organizations. However, they anticipate an increase in automation in the future, expecting 25-50 percent of tasks to be automated within the next three years. This means that existing skilling requirements are likely to change. As a result, roles such as assistant chef, bartender, commis chef, kitchen helper, and facility managers are expected to remain, while new roles such as digital marketer, social media manager, market analysis, intelligence, accounting, menu analyst, walk-in/special tour operators, revenue management, and data analysis are expected to emerge. At the same time, roles like back-end food production, check-in, ticketing, in-room billing and ordering, content writing, social media management, and cleaning may become obsolete. The youth also recognized that technology in the industry may both create and eliminate jobs, highlighting the growing importance of workforce readiness skills. Further, youth indicated a growing emphasis on soft skills, including communication and leadership, alongside digital skills and computer programming. In response, there is a heightened emphasis by educational institutions on fostering entrepreneurship, finance and revenue management, along with the imperative of basic data analysis through statistics. This may be seen as essential for enhancing workforce productivity and facilitating career advancement, especially in light of technological advancements and evolving industry demands.

Secondary research suggests that the tourism and hospitality sector is projected to experience a significant growth, accompanied by an increase in foreign exchange earnings and a rising demand for manpower. However, despite this potential, only one percent of the workforce in the tourism and hospitality industry is currently trained, but there remains a substantial scope for training within the sector. States such as Uttar Pradesh, Madhya Pradesh, Maharashtra and Bihar are expected to show increased workforce requirements in the coming years. Interestingly, these states also boast the largest share of trainable youth in the tourism and hospitality sector.

Given the identified issues, challenges, and context of this report, below are six broad thematic areas where we recommend that the Tourism and Hospitality Skill Council (THSC) strengthen its training and skilling ecosystem. These recommendations are based on consultations, in-depth insights, interviews with key stakeholders such as employers, government authorities, training service providers, industry associations, workers and youth individuals. The recommendations are also grounded in an assessment of the technology and future of work in the tourism and hospitality industry in India.

TABLE 20: KEY ISSUES AND RECOMMENDATIONS FOR INDIA'S TOURISM AND HOSPITALITY INDUSTRY

Challenges	Evidences	Recommendations
Theme 1: Worker's Skilling and Training Needs		
1.1 Youth and workers' evolving skilling and cross training, including upskilling, reskilling needs		
<p>As the tourism and hospitality industry grows, future manpower requirement is expected to rise, but the share of formally trained youth within the industry remains low. This presents a significant challenge of skilling the youth within the growing sector.</p>	<ul style="list-style-type: none"> The Indian tourism and hospitality industry contributed US\$150 billion in 2022 and is further expected to contribute US\$ 1 trillion by 2047. According to the findings using Period Labour Force Surveys (PLFS) data, the tourism and hospitality industry is expected to employ 14.8 million workers by 2028, with an incremental labour demand of 3 million workers between 2024-2028. Further, out of the total 3 million additional workforce needed until 2028, approximately 1.1 million will be skilled, another 1.1 million will be semi-skilled, and the remaining 0.8 million will be unskilled. According to the findings using PLFS data while 5.8 million youth aged between 15-34 years are unemployed but available for work in the tourism and hospitality sector, only 1 percent of youth aged 15-34 years have undergone formal training within the sector, highlighting that 5.7 million youth can be potentially trained within the sector. 	<ul style="list-style-type: none"> Industry must recognize the potential of skilling the youth and initiate in providing as well as scaling up the formal trainings to skill the interested youth. While these trainings must be led by the Tourism and Hospitality Skill Council (THSC)'s trainers, industry experts should be kept in regular loop to ensure the delivery of the curriculum is in line with industry requirements. THSC may take insights from the existing demand studies to understand which job roles and consequent skilling requirements are becoming redundant. Consequently, state governments should be briefed on these findings and industry associations within each state (and sub-sector) should take charge of enhancing training programs for workers. In order to provide training for the 3 million youth interested in entering the tourism and hospitality sector, there is a need for expanded training infrastructure, government financial support and the implementation of THSC courses across ITI. Failure to do so will only widen the training gap.
<p>The largest states in India not only face the challenge of creating most employment opportunities in tourism and hospitality sector but also have the highest share of people who could potentially be trained to work in these sectors.</p>	<ul style="list-style-type: none"> Findings from PLFS survey indicate that overall, among the 3 million additional workforce required until 2028, Maharashtra, West Bengal, and Tamil Nadu account for the highest shares of incremental human resource demand, with 11 percent each. Furthermore, among the estimated 5.7 million pool of youth who can be trained for the tourism and hospitality sector, Uttar Pradesh holds the largest share at 16 percent, followed by Maharashtra at 10 percent, Bihar and West Bengal each at 8 percent, and Rajasthan at 6 percent. 	<ul style="list-style-type: none"> State governments should take proactive steps to implement their state-specific requirements outlined in their Tourism Policies, focusing on expanding training and employment opportunities for youth. This requires active collaboration and support of THSC, Ministry of Tourism and Ministry of Skill Development and Entrepreneurship. Few states examples are mentioned below specifying on what they could tangibly do, in next 3-5 years towards training skilled workforce: The Maharashtra state government, under its 'Aai

Challenges	Evidences	Recommendations
	<ul style="list-style-type: none"> Each state's tourism policies possess unique potential for adequately skilling and training youth, whether through the provision of financial incentives, fiscal support, or addressing state-specific needs that arise as a result of the state's developmental path. For instance, the Maharashtra Government in 2023 launched 'Aai (mother tongue) Tourism Policy', which aims to empower women through its five-point program ranging from women entrepreneurship to women safety and travelers' discounts incentives¹⁰¹. <p>According to the Uttar Pradesh Government's Tourism Policy 2022, there is a promotion of tour packages for pilgrimage tours. Additionally, specific tourist spots like Lucknow, Ayodhya, and Prayagraj have been declared as village tourism hubs. The policy emphasizes fostering local entrepreneurship within low-income groups to create additional income opportunities¹⁰².</p> <p>The Rajasthan Government's 2020 tourism policy lays emphasis on promoting rural tourism, enhancing the unique forms handicrafts of village experiential tourism covering arts, culture, folk dance, music, etc.¹⁰³</p> <ul style="list-style-type: none"> The Central Government's National Strategy for Rural Homestays policy 2022 emphasizes on enhancing youth's self-employment, entrepreneurship and facilitate enterprise development¹⁰⁴. 	<p>Tourism Policy' emphasizing women entrepreneurship and advancement, may prioritize advocating for training programs and industry initiatives aimed at women-centric job roles such as culinary entrepreneurs and community engagement coordinators. Additionally, given the development of Agro Tourism and Adventure Tourism sub-sectors in Maharashtra, there is a demand for training youth in roles such as Farm Tour Guides and Wildlife Safari Guides.</p> <ul style="list-style-type: none"> The Uttar Pradesh state government can set up specialized training institutes in prominent tourist destinations such as Agra (home to the Taj Mahal) and Varanasi to provide training in hospitality management and tour guiding. Moreover, recognizing the significant potential for Religious Tourism in Ayodhya, training programs focusing on the history of the Ram Mandir and other religious sites should also be offered. This would require either developing newer job roles such as cultural interpreter, and/or reskilling and upskilling the workers in areas such as communication, and knowledge of the religious history of the region. The Rajasthan state government has an opportunity to expand its offerings in hospitality skills, particularly in folk dance, music, traditional cuisines, and luxury hospitality management for heritage hotels, focusing on heritage tourism. This involves creating new job roles like cultural tour guides and Rajasthani cuisine chefs, and developing skills such as language proficiency, networking, team

¹⁰¹ The Indian Express. (2023). Maharashtra cabinet nod to 'Aai' tourism policy; women entrepreneurs, tourists to get special benefits. Retrieved from: <https://indianexpress.com/article/cities/mumbai/maharashtra-cabinet-nod-to-aai-tourism-policy-women-entrepreneurs-tourists-special-benefits-8637485/> ; Maharashtra Tourism. <https://maharashtratourism.gov.in/aai-login/>

¹⁰² Uttar Pradesh Government. (2023). Uttar Pradesh Tourism Policy 2022. Retrieved from: https://uptourism.gov.in/site/writerreaddata/siteContent/202304121228277212Tourism-Policy-2022_Website.pdf

¹⁰³ Rajasthan Government. (2020). Rajasthan Tourism Policy. Retrieved from: <https://www.tourism.rajasthan.gov.in/content/dam/rajasthan-tourism/english/homepage/topslider/Rajasthan%20Tourism%20Policy%202020.pdf>

¹⁰⁴ Ministry of Tourism. 2022. National Strategy for Rural Homestays. Retrieved from: <https://tourism.gov.in/sites/default/files/2022-09/National%20Strategy%20for%20Promotion%20of%20Rural%20Homestays%202022.pdf>

Challenges	Evidences	Recommendations
		<p>management, and leadership among the youth. Collaboration between THSC, industry-led training initiatives, and state government support is essential for its success.</p> <ul style="list-style-type: none"> Regarding rural homestays, while the central government policy is appreciable, the real push for entrepreneurship and enterprise development through home stays can be promoted by state governments. The specific training and upskilling needs can be addressed with support from the THSC and NSDC. THSC, leveraging its existing qualification pack and guide for Home stay hosts can provide tailored advice and training to meet the requirements of the sector¹⁰⁵. States like Maharashtra, with the highest projected workforce requirements for training in the coming years, can enhance their current homestay policies¹⁰⁶. Instead of solely listing homestay tour operators on their tourism websites, Maharashtra can develop comprehensive policies that support the growth of homestay businesses. This could include providing training and resources for aspiring homestay hosts, promoting quality standards for homestay accommodations, and facilitating networking opportunities within the industry. By actively supporting and promoting homestays, Maharashtra can tap into the potential of this sector to create employment opportunities and enhance the tourism experience in the state.
<p>India's most tourism-intensive and employment-heavy states, notably Southern states like Karnataka and Tamil Nadu, are experiencing an aging population, underlining the need for workforce mobilization from other regions of the country.</p>	<ul style="list-style-type: none"> As per the youth survey findings, 21 percent of the youth was willing to migrate out of their native place for work opportunities. Of these, 56 percent are willing to migrate out of their native state. Of these 56 percent, 19 percent demonstrate a preference for relocating to states like Karnataka, which are facing 	<ul style="list-style-type: none"> Given the possibility of workforce mobilization across Southern states, it is recommended to place greater emphasis on holistic training and upskilling of the workforce to enable them to work in any part of the country. The training may prioritize areas like cultural sensitivity (such as

¹⁰⁵ Tourism and Hospitality Skill Council. (n.d.). Home Stay Host. Retrieved from: https://thsc.in/admin/uploads/curriculum/Home%20Stay%20Host_THC%20Q0504.pdf

¹⁰⁶ Maharashtra Tourism. (2024). Login. Retrieved from: <https://maharashtratourism.gov.in/aai-login/#>

Challenges	Evidences	Recommendations
	<p>demographic aging. Given that Tamil Nadu and Karnataka will account for 10 percent and 7 percent, respectively, of the 3 million incremental demand anticipated until 2028. Consequently, these states will experience a rise in both migrant inflow and their native workforce.</p> <ul style="list-style-type: none"> • According to the employer survey findings, employers who recruit migrant workers predominantly source labor from Bihar, Uttar Pradesh, Maharashtra and Delhi, meaning that employers from Karnataka and Tamil Nadu may source labour from the mentioned states. This finding is corroborated with secondary research which shows that low urbanization in the central, eastern, and north-eastern regions of India encourages workers to migrate towards the southern and western regions where greater employment opportunities are available¹⁰⁷. • Migrants however often face racial discrimination. For instance, North-eastern migrants are often considered as being East-Asian or Chinese due to their 'yellowish skin tone'¹⁰⁸. 	<p>respecting people from different states and races), and personality development. The trainings should include a module focusing on learning the basics of at-least 1 regional language as per the preferences of the candidates. This will ease their integration into the workforce of the state to which they migrate for employment.</p> <ul style="list-style-type: none"> • THSC may organize awareness sessions for youth and introduce modules for trainer/teachers that cultivate an understanding of diverse cultures, races, and customs prevalent in different regions of the country to encourage open dialogue and experiential learning activities that promote empathy, tolerance, and appreciation for differences.
<p>Despite the availability of courses catering to crucial technical, digital, and soft skills, employers express concerns about the apparent gap in these essential skill competencies among workers.</p>	<ul style="list-style-type: none"> • Training service providers and educational institutions highlighted a rising preference among employers for students with soft skills and digital skills (including software and computer skills) in addition to job-specific technical skills for employability in the hospitality industry. • The employers survey revealed that job-relevant soft skills such as verbal and written communication (53 percent employers), complex problem-solving skills involving customer interactions (50 percent), job-relevant language skills (46 percent), digital/ICT skills (43 percent) are lacking in workers. 	<ul style="list-style-type: none"> • THSC may collaborate with the Ministry of Skill Development and Entrepreneurship and Ministry of Education to encourage premier institutions to offer a short term (3-6 months) fresh skilling and/or upskilling/re-skilling course. This course could be an e-learning type of certificate course around the essential skills such as communication, complex problem solving, relevant language skills, and data analysis. These courses may have a component for mandatory internships during the course and provide opportunities for apprenticeships post-completion. • Regarding these e-learning short term trainings, THSC can

¹⁰⁷ International Labour Organization. (2020). India: Road map for developing a policy framework for the inclusion of internal migrant workers in India. Retrieved from https://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/---sro-new_delhi/documents/publication/wcms_763352.pdf

¹⁰⁸ Dolly Kikon and Bengt G. Karlsson (2020) Light Skin and Soft Skills: Training Indigenous Migrants for the Hospitality Sector in India, Ethnos, 85:2, 258-275, DOI: 10.1080/00141844.2018.1543717

Challenges	Evidences	Recommendations
		<p>encourage the service providers to provide curricula in multiple languages, including mother tongue and local languages and English so that students can learn the courses with ease.</p>
<p>Educational institutions recognize the emergence of new job roles; however, they often fail to adequately address the evolving skilling needs in their curriculum delivery.</p>	<ul style="list-style-type: none"> The interactions with industry associations and educational institutions reveal that job roles such as chef entrepreneurs, airline hospitality, facility management planners, customer handling, tech-friendly tour guides; specialized revenue management; event management, industrial catering; adventure tourism, religious tourism, experiential tourism will emerge in future. As per the interactions with industry associations, culinary skills, tour costing, foreign language skills, revenue management skills, that educational institutions should place more emphasis on, as workers are least proficient in these skills. 	<ul style="list-style-type: none"> The existing qualification packs offered by the THSC should aim at providing training in emerging skills such as cultural sensitivity, foreign language, problem-solving, tour costing alongside technical competencies like data analysis, hospitality management systems, sustainable practices, hygiene and cleanliness related skills. THSC may increase their focus on new qualification packs which cater to the emerging job roles particularly for chef entrepreneurs, facility management planner, experiential tourism, and religious tourism.
1.2 Trainer/Teacher Training and Professional Development		
<p>The tourism and hospitality industry faces a critical shortage of professionally trained instructors.</p>	<ul style="list-style-type: none"> In our qualitative interactions with different stakeholders, one common concern was about the lack of adequate and professional trainers in educational institutions. Having well-qualified instructors who does not only have expertise, but also excel as effective educators is deemed critical for nurturing the youth and professionals in the hospitality industry¹⁰⁹. 	<ul style="list-style-type: none"> THSC can invest in regular training, i.e. once in every quarter for their teachers and trainers to keep them abreast of industry trends related to curriculum delivery. For the smaller private educational institutions or training service providers, THSC should ensure that these institutions are frequently reached out by the industry for their regular professional development training.
1.3 Increased focus on gig workers' skilling		
<p>Although youth may opt for gig work, especially in the food services sub-sector of tourism and hospitality, there is a lack of training programs tailored for such workers.</p>	<ul style="list-style-type: none"> As per the youth survey, 22 percent of the youth expressed interest in pursuing gig work, with the maximum interest observed among students, followed by wage and salaried workers. Qualitative interviews showed that training for gig workers, especially those engaged in food services like Zomato and Swiggy, is crucial. 	<ul style="list-style-type: none"> Specific type of workers within gig economy such as taxi drivers, Uber and Ola auto drivers, cleaners, and cooks should receive training support (from government through initiatives like Prime Minister Vishwakarma) for their skill improvement. Prioritizing specialized training for workers in various segments,

¹⁰⁹ Hospitality Insights. (n.d.). Quality education and training solutions in hospitality education. Retrieved from <https://hospitalityinsights.ehl.edu/quality-education-training-solutions-hospitality-education>

Challenges	Evidences	Recommendations
		<p>including tourist touchpoints and street food vendors, will not only enrich their contributions to the tourism experience but also foster inclusive growth within the industry. Collaborative efforts of THSC, educational and training institutions, industry and the National Skill Development Corporation (NSDC) and Ministry of Skill Development and Entrepreneurship (MSME) may help in customizing the training program.</p>
<p>Theme 2: Training Facilities and Curricula: Issues and Challenges</p>		
<p>Disparity in provision of training programs exist for informal firms and small sized firms. While larger companies often provide comprehensive training and certification processes, smaller players frequently lack such resources and opportunities for their workforce.</p>	<ul style="list-style-type: none"> • Overall, of the 553 employers surveyed, only 34 percent employers had training facilities for their workers. Only 21 percent of the unorganized sector employers compared to 54 percent organized sector employers had some sort of training facility in their organizations. • Of those 34 percent employers who had training facilities, 60 percent employers had an in-house training facility for their workers. A firm size-wise analysis suggested that of those group of employers having training facilities, 91 percent large-sized employers, 49 percent small-sized employers, 33 percent micro-sized employers, and 67 percent medium-sized employers provided inhouse trainings for their workers. • Further, of the 34 percent of employers who have training facility, 21 percent of employers had not provided any kind of trainings in the past year. The primary reason cited was cost constraints (39 percent employers). • Overall, only 43 percent employers reported to be interested in providing skill development training to their employees in the coming 12 months. Only 29 percent small sized employers expressed the willingness compared to 67 percent large sized employers. 	<ul style="list-style-type: none"> • THSC must encourage small sized firms and informal sector employers to provide either in-house training or outsourced training to their workers. • Support for small players, constrained by costs, can be facilitated through collaborations between THSC and industry stakeholders. This collaboration can involve disseminating information about freely available online training courses or assisting them in collaborating with training providers who offer affordable solutions. Moreover, incentivizing participation by offering certificate benefits and recognizing firms through features on THSC's social media platforms can serve as rewards for expanding their training facilities for their workers.

Challenges	Evidences	Recommendations
<p>Limited integration of Food Safety and Standards Authority of India (FSSAI) rules and regulations into the existing training curricula.</p>	<ul style="list-style-type: none"> The qualitative interactions revealed that the informal units such as street food vendors and food delivery units face challenges in understanding the food safety standards (including hygiene) and FSSAI standards. 	<ul style="list-style-type: none"> Joint certification initiatives can be established by THSC and the FSSAI, specifically targeting informal workers such as street food vendors and food delivery associates. This certification program would ensure that these workers meet the required standards of hygiene and food safety, enhancing consumer confidence and promoting the overall quality of services within the industry.
<p>Theme 3: Quality Placements through Industry – Institute Linkages</p>		
<p>Despite the ongoing efforts of educational institutions to equip students for employment, industries continue to experience skill shortages among the workers they recruit from these institutions.</p>	<ul style="list-style-type: none"> Qualitative insights suggested that although educational institutions implementing various best practices such as introducing separate modules on employability skills, inviting guest lectures, and conducting numerous mock interviews, pre-placement talks, and sessions, employers still face challenges related to skill adequacy and shortages when hiring students from these institutions. 	<ul style="list-style-type: none"> To ensure quality placements, and strengthen academia-industry linkages, THSC already plays an active role in advisory boards, offers its own courses, curriculum, and career support. Additionally, it is suggested that THSC may directly engage with private and government educational institutes and industry partners through webinars, seminars, and workshops to communicate industry needs and advocate for necessary changes in delivery of education curricula. Facilitating dialogue on evolving skilling needs, emerging job roles, and industry changes is crucial, and THSC, as a mediator, can inform educational institutions and industries about necessary adjustments to enhance the overall quality of placements.
<p>Theme 4: Awareness Generation Programs for Youth including Workers, Employers, and Industry</p>		
<p>A. For Skilling and Training Initiatives and Apprenticeships</p>		
<p>There is a relative lack of awareness among youth, including workers, and employers regarding skilling and training initiatives, as well as opportunities for apprenticeships and internships.</p>	<ul style="list-style-type: none"> The surveyed youth exhibited limited awareness of government skilling initiatives, such as the National Apprenticeship Promotion Scheme (NAPS), with just 45 percent youth citing an awareness about the apprenticeship training scheme. The enquiry with employers on their awareness of training strategies such as Recruit-Train-Deploy (RTD) suggested that only 26 percent employers were aware of the strategy. The degree of awareness varied among surveyed employers belonging to different size of firms as follows - large-sized employers (47 	<ul style="list-style-type: none"> While THSC has been actively promoting the NAPS and emphasizing the importance of apprenticeships, it can further enhance awareness beyond its official gazette notification. The apprenticeship scheme should be positioned as a robust skilling model, with industry stakeholders stepping forward to educate youth about its benefits. THSC could adopt innovative digital measures for awareness, such as use of interactive digital brochures, features such as 'news tracker', vacancy circulars etc.

Challenges	Evidences	Recommendations
	<p>percent), medium-sized employers (44 percent), small-sized employers (28 percent) and micro-sized employers (10 percent).</p> <ul style="list-style-type: none"> As per the India Skills report 2024, promoting Vocational Education and Apprenticeship Programmes is inclined to create a steady pipeline of skilled manpower¹¹⁰. 	<p>These may be featured not only on their own websites and social media platforms but also linked with the Ministry websites, managed periodically, and updated regularly by the THSC marketing team.</p> <ul style="list-style-type: none"> THSC can effectively utilize social media platforms to disseminate information about its Recruit-Train-Deploy (RTD) strategy for industries, the significance of Short-Term Training (STT), the Recognition of Prior Learning (RPL) scheme, and other government initiatives. Additionally, occasional posts featuring success stories of these strategies and schemes, as well as information on emerging sub-sectors such as homestays, can help raise awareness and engagement among stakeholder. In addition to digital outreach efforts, expanding awareness of apprenticeships and internships, particularly among small-sized firms, can be achieved through interactive sessions such as workshops tailored for these firms. These sessions can involve discussions on success stories and facilitate networking or interlinking between different firms with the support of THSC. By facilitating knowledge-sharing and collaboration among various types of firms, including small-sized ones, the industry as a whole can benefit from learning from each other's experiences.
B. For Industry Awareness		
<p>Poor working conditions and low wage levels are resulting in high attrition rate and further contribute to a lack of motivation and sustained interest in the sector for workers.</p>	<ul style="list-style-type: none"> The average attrition rate across the 553 surveyed employers was found to be 21 percent. Reasons cited for this high turnover include lower wages, better job opportunities elsewhere, and pressures related to household duties. These findings underscore the existence of poor working conditions within the industry, as reported by the surveyed employers. At the sub-sectoral level, 	<ul style="list-style-type: none"> To foster positive sentiment within the industry, THSC can address information asymmetries by conducting periodic industry awareness sessions and collaborating with key stakeholders such as the NSDC MSDE, Ministry of Tourism, and employers from various firms. Platforms like webinars, seminars, and sessions can facilitate

¹¹⁰ Wheebox (2024). India Skills Report 2024. Retrieved from: https://wheebox.com/assets/pdf/ISR_Report_2024.pdf.

Challenges	Evidences	Recommendations
	<p>tourism-tour and travel companies and micro enterprises had relatively highest attrition rate as accounted by 22 percent employers each, respectively.</p> <ul style="list-style-type: none"> The youth survey revealed that low wages were a significant source of dissatisfaction among waged and/or salaried youth, cited by 34 percent of respondents. Additionally, regarding working hours, while 71 percent of waged and salaried youth reported having a designated 8-hour workday, only 38 percent adhered strictly to these designated hours. According to a latest global report of Hospitality Industry Outlook 2023¹¹¹, the hospitality industry is seen to have an unfavorable reputation rooted in frequently stressful working conditions, regular overtime demands and comparatively modest salaries. When coupled with the complexities of rapidly evolving job expectations and insufficient entry-level training, it becomes evident that the industry needs assistance.¹¹² 	<p>effective communication and problem-solving.</p> <ul style="list-style-type: none"> Industry should be encouraged to consider standardizing and enhancing workers' working hours and wage rates to prevent workforce attrition, in which THSC may support via active backing and real-time suggestions to industries for implementing their sub-sectors specific improvements, fostering a mutually beneficial environment for both employers and workers.
C. Career Counseling Services for Youth		
<p>Limited awareness and utilization of career counseling services among youth.</p>	<ul style="list-style-type: none"> As per the youth survey, only 43 percent of the youth was aware about the career counselling services in their neighboring areas. Out of those youth who are aware, 65 percent of them is currently utilizing the career counselling services. 	<ul style="list-style-type: none"> THSC should collaborate with educational institutions to train their teachers who would further counsel the students regarding possible career opportunities in tourism and hospitality industry. Building on THSC's recent launch of their career guidance brochure for aspirants, the expansion of career counseling services could be enhanced through collaboration with the National Career Services under the Ministry of Labour and Employment. This partnership could facilitate increased outreach and scalability, providing comprehensive career guidance and support to a wider audience.

¹¹¹ Hospitality Insights. (n.d.). Quality education and training solutions in hospitality education. Retrieved from <https://hospitalityinsights.ehl.edu/quality-education-training-solutions-hospitality-education>

¹¹² Hospitality Insights. (n.d.). Hospitality industry report 2023. Retrieved from <https://hospitalityinsights.ehl.edu/hospitality-industry-report-2023>

Challenges	Evidences	Recommendations
		<ul style="list-style-type: none"> THSC should promote inclusive targeting for career planning and progression in its knowledge sessions and training programs to ensure the continuous participation of all forms of workers, including women, self-employed individuals, informal workers, gig workers, and entrepreneurs. This approach will facilitate equitable access to opportunities and support the diverse needs of individuals across various segments of the workforce.
Theme 5: Research, Monitoring and Evaluation		
<p>Missing public information on industry knowledge, updates on a real-time basis on THSC's website.</p> <p>Measuring the effectiveness of training programs for newer sub-sector segments such as homestays or emerging tourism streams.</p>	<ul style="list-style-type: none"> THSC's website currently does not have an interactive interface for public information such as latest industry trends, workers and employer's login page or such facilities. The qualitative interactions revealed that youth and workers working across emerging forms of tourism such as adventure tourism, religious tourism, experiential tourism etc. struggle in communicating with their clients owing a low awareness of these new avenues. 	<ul style="list-style-type: none"> A public dashboard or an information portal is recommended to be developed by THSC, given THSC is engaged in constant industry dialogues, research initiatives and development of tourism and hospitality industry. This dashboard may be periodically monitored and dynamically updated for public information purposes at large. Consistent efforts to update the portal about emerging trends, technologies, and safety innovations in newer streams of tourism such as adventure sports is suggested.
Theme 6: India's Cruise Tourism Development		
<p>The Indian cruise tourism sector heavily relies on the international market for domestic sector's overall growth. Additionally, there is a lack of skilling and educational opportunities for India's cruise tourism workforce.</p>	<ul style="list-style-type: none"> India's cruise tourism represents about 1 percent of the global cruise industry, and has experienced consistent growth in the recent years, presenting a promising opportunity for the country¹¹³. Youth survey findings suggest that of the 35 percent students pursuing education within tourism and hospitality industry, only 1 percent study courses related to cruise tourism. Further, of the wage and salaried youth, only 1 percent are working in cruise liners. India's Draft National Strategy for Cruise Tourism 2023 emphasizes on 	<ul style="list-style-type: none"> In line with India's cruise tourism national policy aimed at creating a skilled workforce aligned with international cruise tourism standards, THSC can play a pivotal role. This involves assessing the market demand for cruise tourism workers, facilitating training for the Indian youth tailored to both domestic and global markets, and offering sector-specific courses to enhance the development of workers in this segment.

¹¹³Ministry of Ports, Shipping and Waterways, Government of India. (n.d.). Maritime Amrit Kaal Vision 2047 (MAKV 2047). Retrieved from https://shipmin.gov.in/sites/default/files/Maritime%20Amrit%20Kaal%20Vision%202047%20%28MAKV%202047%29_compressed_0.pdf

Challenges	Evidences	Recommendations
	skilling for cruise tourism value chain, as well as destination-based skilling programs for upgradation and development of tourism skills, which is often seen as missing along any of the tourism value chains. ¹¹⁴	

¹¹⁴ Government of India. (2023, June). Skill Development for Employability and Youth Transformation Scheme. Press Information Bureau. <https://static.pib.gov.in/WriteReadData/specificdocs/documents/2023/jun/doc2023627218001.pdf>

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9. Annexures

Annexure A: Sampling Methodology

Selection of States and Districts

For the quantitative surveys, it was required to select 20 states and 6 UTs with maximum tourist footfall. We, however, believed that tourist footfall alone is not sufficient to determine the top 20 states and 6 UTs for our study as this variable alone did not represent the entirety of the tourism landscape. Therefore, we utilized the data on number of persons engaged in accommodation sector within each state from the Periodic Labour Force Survey (PLFS) 2018-19¹¹⁵, along with number of domestic tourists visits from India Tourism Statistics 2019¹¹⁶ to select top 20 states and 6 Union Territories for our study.

Step 1: Validating the choice of variables.

We picked the (i) number of domestic tourists visits in 2018-19 from the India Tourism Statistics 2019 and estimated the (ii) number of workforces engaged in accommodation sector in each state from PLFS 2018-19. While we understood that the two variables represent main aspects of the tourism industry, it was important to validate whether these two variables are strong determinants of tourism landscape. We therefore calculated Pearson's Correlation Coefficient to understand the strength and direction of association between these variables.

Using the formula for Pearson's Correlation Coefficient (P), we found that the chosen two variables were strongly positively correlated (P = +87 percent). The strong correlation determined that both these variables together validated that if a state has a large number of tourist visits, then it was also likely to have a large number of workforces engaged in accommodation sector, and vice versa. If the P had been lower than 40 percent, we would have dropped either of these variables.

Step 2: Selection of 20 states

Next, in order to choose 20 states depicting the tourism landscape, we sort (in descending order) the two chosen variables across all 29 states and 7 UTs. We then chose the 20 states and 6 UTs topping the list for further ranking of the states.

Step 3: Ranking the chosen states

Once we had the list of 20 states, the last step was to rank them in order of 1 – 20, 1 being the relatively more 'touristy' state, while 20 being relatively less 'touristy' state.

To rank the states, we ordered the states based on following two parameters:

1. Tourism landscape i.e., number of tourist visits and number of workforces engaged in accommodation sector - this is termed as 'Rank Type 1' and was calculated to determine 'magnitude' of a tourist place.
2. Geographical coverage i.e., size of the state in terms of number of districts in each state - termed as 'Rank Type 2' and was calculated to understand the spread of a tourist place.

It was important to consider size of the state because some states had a relatively higher number of tourist visits per district, but were concentrated in only few districts. For example, some states such as Himachal Pradesh will have more tourists concentrated in 2-3 districts (such as Shimla, Kullu, Spiti etc.), as compared to Madhya Pradesh where tourists are spread across more districts (Ujjain, Bhopal, Jabalpur, Gwalior, Indore, Niwari etc.). Therefore, it was important to consider both, the magnitude and spread of a tourist place.

For calculate each type of rank, we sorted the respective variables in a descending order. We then calculated the average rank for each state (using rank 1 and rank 2), which is used to calculate the final rank.

Step 4: Selection of districts

In order to select the districts, we will divide the 20 states in 3 strata –

¹¹⁵ We have deliberately chosen the year 2018-19 instead of 2022 to avoid the over or underestimation of employment after COVID-19 years during and post COVID (i.e. 2020,2021,2022) are therefore not taken into consideration for the purpose of sampling.

¹¹⁶ We have deliberately chosen the year 2019 instead of latest year (i.e. 2022) to avoid the over or underestimation of tourist footfall after COVID-19 years during and post COVID (i.e. 2020,2021,2022) are therefore not taken into consideration for the purpose of sampling.

- a) 4 district per state if rank was between 1 to 6.
- b) 3 district per state if rank was between 7 to 14.
- c) 2 districts per state if rank was between 15 to 20.

This type of selection ensured we cover a greater number of districts from relatively larger states, which had more tourism visits and workforce engaged in accommodation sector, and relatively lesser number of districts from states which had lesser tourism visits and workforce engaged in accommodation sector. We utilized state tourism databases/reports to select the districts which had highest tourism concentration (i.e., maximum number of tourist visits). The final list of selected states and districts is given below in the table.

TABLE 21: LIST OF STATES AND DISTRICTS COVERED FOR QUANTITATIVE SURVEYS WITH EMPLOYERS AND YOUTH

S.No.	State	Number of Districts	District Name
1.	Uttar Pradesh	8	Varanasi
			Mathura
			Prayagraj
			Ayodhya
			Jhansi
			Agra
			Lucknow
			Pilibhit
2.	Tamil Nadu	8	Chennai
			Dindigul
			Madurai
			Kanyakumari
			Thanjavur
			The Nilgiris
			Ramanathapuram
			Kanchipuram
3.	Madhya Pradesh	10	Balaghat
			Bhopal
			Chhatarpur
			Gwalior
			Indore
			Jabalpur
			Mandla
			Panna
			Ujjain
			Umria
4.	Maharashtra	10	Mumbai
			Ahmednagar
			Pune
			Aurangabad
			Kolhapur
			Nagpur
			Nasik
			Thane
			Satara
			Raighad
5.	Karnataka	8	Bangalore
			Mysore
			Mangalore
			Udupi
			Bijapur
			Chikamagalur
			Kodagu
			Uttara Kannada
	Gujarat	8	Ahmedabad

S.No.	State	Number of Districts	District Name
6.			Devbhumi Dwarka
			Surat
			Gir Somnath
			Bhavnagar
			Kutch
			Narmada
7.	Andhra Pradesh	5	Gandhinagar
			Chittoor
			Visakhapatnam
			Konaseema
			Tirupati
8.	Rajasthan	6	Alluri Sitharama Raju
			Ajmer
			Sawai Madhopur
			Jaisalmer
			Jaipur
			Jodhpur
9.	Bihar	3	Udaipur
			Gaya
			Patna
10.	West Bengal	6	Nalanda
			Kolkata
			Purba Medinipur
			North 24 Parganas
			South 24 Parganas
			Darjeeling
11.	Jharkhand	2	Kalimpong
			Deoghar
			Ranchi
12.	Odisha	5	Puri
			Khordha
			Cuttack
			Ganjam
			Jagatsinghpur
13.	Uttarakhand	5	Haridwar
			Dehradun
			Tehri
			Chamoli
			Nainital
14.	Jammu and Kashmir (UT)	3	Jammu
			Reasi
			Srinagar
15.	Kerala	7	Ernakulam
			Thiruvananthapuram
			Idukki
			Thrissur
			Kozhikode
			Alappuzha
16.	Himachal Pradesh	5	Malappuram
			Shimla
			Kullu
			Kangra
			Chamba
17.	Goa	2	Solan
			North Goa
			South Goa

S.No.	State	Number of Districts	District Name
18.	Assam	4	Kamrup
			Jorhat
			Cachar
			Nagaon
19.	Sikkim	4	Gangtok
			Mangan
			Pakyong
			Namchi
20.	Meghalaya	4	East Khasi Hills
			West Garo Hills
			Ri Bhoi
			West Jaintia Hills
21.	Telangana	3	Hyderabad
			Warangal
			Nalgonda
22.	Union territory of India	5	Andaman
			Pondicherry
			Daman and Diu
			Ladakh
			Delhi NCR
Total		121	

Annexure B: List of Stakeholders Interviewed for In-Depth Discussions

TABLE 22: LIST OF GOVERNMENT DEPARTMENTS/NON-PRIVATE ORGANIZATIONS INTERVIEWED

S.No.	State	Organization/ Ministry
1.	Delhi	Responsible Tourism Society of India
2.	Delhi	Ministry of Tourism
3.	Delhi	National Skill Development Corporation
4.	Tamil Nadu	Tamil Nadu Tourism Development Corporation
5.	Pondicherry	Labour Department, Pondicherry
6.	Andhra Pradesh	Labour Department, Vijaywada
7.	Meghalaya	Livelihoods Department, Meghalaya

TABLE 23: LIST OF INDUSTRY ASSOCIATIONS INTERVIEWED

S. No.	State	Association
1.	Assam	Federation of Indian Chambers of Commerce and Industry
2.	Delhi	National Restaurant Association Of India
3.	Delhi	Federation of Associations in Indian Tourism and Hospitality
4.	Delhi	Confederation of Indian Industry
5.	Gujarat	Hoteliers Club
6.	Karnataka	Professional Housekeepers Association
7.	Kerala	Association of Tourism Trade Organisations India
8.	Meghalaya	Federation of Indian Chambers of Commerce and Industry
9.	Tamil Nadu	South Indian Chef Association
10.	Tamil Nadu	Indian Federation of Culinary Association (IFCA)

TABLE 24: LIST OF EDUCATIONAL INSTITUTIONS INTERVIEWED

S. No.	State	Institution
1.	Delhi	Ambedkar University

S. No.	State	Institution
2.	Delhi	Banarsidas Chandiwala Institute of Hotel Management and Catering Technology
3.	Delhi	Institute of Hotel Management, Pusa
4.	Delhi	Starex University
5.	Delhi	The Hotel School
6.	Gujarat	C.P. Patel and FH Shah Commerce College, Anand
7.	Gujarat	Institute of Hotel Management, Ahmedabad
8.	Gujarat	N S Patel Art College
9.	Haryana	GD Goenka University
10.	Jharkhand	Institute of Hotel Management, Ranchi
11.	Karnataka	CHRIST (Deemed to be University)
12.	Karnataka	Army Institute of Hotel Management and Catering Technology
13.	Meghalaya	IHM, Shillong
14.	Meghalaya	Lady Keane College
15.	Meghalaya	NEHU University
16.	Tamil Nadu	Madras Christian College
17.	Uttar Pradesh	Impact Institute of Hotel Management, Agra
18.	Uttar Pradesh	Mangalayatan University
19.	Uttar Pradesh	RIG Institute of Hospitality and Management
20.	Uttarakhand	Sawami Rama Himalayan University
21.	West Bengal	Gobardanga Hindu College
22.	West Bengal	Mugberia Gangadhar Mahavidhyalaya
23.	West Bengal	Nabagram Hiralal Paul College
24.	West Bengal	Serampore College
25.	Karnataka	Army Institute of Hotel Management and Catering Technology
26.	Karnataka	Central University of Karnataka
27.	Odisha	Community College Bhawanipatna
28.	Odisha	Fakir Mohan Autonomous College, Balasore
29.	Odisha	Niligiri College

TABLE 25: LIST OF TRAINING SERVICE PROVIDERS INTERVIEWED

S. No.	State	Institution
1.	Andhra Pradesh	Skill Development Institute, Visakhapatnam – Anakapalle
2.	Andhra Pradesh	Andhra Pradesh Industrial and Technical Consultancy Organisation Limited
3.	Andhra Pradesh	Prince of Peace Educational Society
4.	Delhi	Jagan Nath Gupta Memorial Educational Society
5.	Delhi	Empower Pragati Vocational and Staffing Pvt Ltd.
6.	Delhi	IL&FS Skills Development Corporation Limited
7.	Goa	Aviation Skill Development Centre
8.	Gujarat	Frankfinn Aviation Services Private Limited - Ahmedabad Maninagar
9.	Himachal Pradesh	JITM Skills Pvt Ltd
10.	Jammu and Kashmir	Arc Hospitality Institute
11.	Madhya Pradesh	Indianeers Media Private Limited
12.	Maharashtra	Sols Assessment And Remedial Centre (Sols ARC)
13.	Maharashtra	Blue Whale Academy (A Division of E-Plus Technologies (I) Pvt. Ltd.)
14.	Meghalaya	Dasan K S
15.	Tamil Nadu	Jeyram Education Trust
16.	Tamil Nadu	Oscar Charitable Trust
17.	Tamil Nadu	Fathima educational and charitable trust
18.	Tamil Nadu	Jaya institute of hotel management and catering services
19.	Tamil Nadu	Lathas School of Baking and Cake art
20.	Uttar Pradesh	Centre for Advanced Research Development
21.	Uttar Pradesh	Salesman Corporation Private Limited (OPC)
22.	Uttarakhand	Youth Educational Society Dehradun
23.	Uttarakhand	Dev Rishi Education Society

S. No.	State	Institution
24.	West Bengal	Future Vision Training Centre
25.	Karnataka	Sugar Craft Private Limited
26.	Karnataka	Forest Technical and Administrative Training Institute

TABLE 26: LIST OF INTERVIEWED SENIOR REPRESENTATIVES OF THSC BOARD AND SUB-COMMITTEE

S. No.	Stakeholder Name	Designation	Name of the Organization
1.	Ms. Gurleen Bhalla	Area Director of Human Resources	Marriott Hotels India
2.	Mr. Zaheer Ellias Najeeb	Executive Director	Airtravel Enterprises Group of Companies
3.	Mr. Rajesh Kumar	Senior Vice President Human Resources	The Lemon Tree Hotel Company
4.	Mr. Julian Ayers	Chief Resort Officer	Mahindra Holidays and Resorts
5.	Mr. Nihar Mehta	General Manager Human Resources	Sarovar Hotels Pvt. Ltd.
6.	Mr. Sougata Roy Choudhury	Executive Director	Confederation of Indian Industry
7.	Mr. Vijay Kumar	Manager Human Resources	Radisson Hotels
8.	Dr. Kerwin Savio Nigli	Head of Department of Hotel Management	CHRIST University
9.	Dr. Chef. K Thirugnanasambantham	Principal	Welcomgroup Graduate School of Hotel Administration
10.	Mr. Pronab Sarkar	President	Indian Association of Tour Operator (IATO)
11.	Mr. Satish Kumar	Senior Director Talent and Culture	Accor India and South Asia
12.	Mr. Samir Kuckreja	Founder and CEO	Tasanaya Hospitality Private Limited
13.	Mr. Rishikesh Patankar	Vice President, Industry and Academia Collaborations	National Skill Development Corporation
14.	Mr. Gyan Bhushan	Senior Economic Advisor	Ministry of Tourism

Annexure C: Quantitative and Qualitative Surveys Coverage

TABLE 27: STATE WISE COVERAGE (IN PERCENTAGE) FOR QUANTITATIVE SURVEYS (EMPLOYER AND YOUTH)

S. No.	State	Employer (%)	Youth (%)
1.	Andhra Pradesh	4.1	4.7
2.	Assam	3.3	1.4
3.	Bihar	2.5	2.4
4.	Daman and Diu	0.8	0.9
5.	Delhi NCR	0.8	2.4
6.	Goa	1.7	1.8
7.	Gujarat	6.6	7.6
8.	Himachal Pradesh	4.2	4.5
9.	Jammu and Kashmir	2.4	2.5
10.	Jharkhand	1.5	2.0
11.	Karnataka	6.5	2.5
12.	Kerala	5.8	7.8
13.	Andaman and Nicobar	0.8	0.9
14.	Madhya Pradesh	8.3	8.5
15.	Maharashtra	8.5	11.4
16.	Meghalaya	3.3	2.5
17.	Odisha	4.0	4.9

S. No.	State	Employer (%)	Youth (%)
18.	Puducherry (Pondicherry)	0.8	0.7
19.	Rajasthan	5.0	4.2
20.	Sikkim	3.3	3.4
21.	Tamil Nadu	6.5	4.9
22.	Telangana	2.4	2.5
23.	Uttar Pradesh	6.7	7.2
24.	Uttarakhand	4.3	4.3
25.	West Bengal	4.9	3.8
26.	Ladakh	0.8	0.2

TABLE 28: STATE WISE COVERAGE FOR QUALITATIVE SURVEYS (IN NUMBERS)

S. No.	State	Training Service Providers	Educational Institutions	Industry Associations	Government Departments/ Organizations
1.	Assam	-	-	1	-
2.	Delhi	3	5	3	3
3.	Gujarat	1	4	1	
4.	Karnataka	2	3	1	
5.	Maharashtra	2	1		
6.	Meghalaya	1	3		1
7.	Tamil Nadu	5	1	3	1
8.	Uttar Pradesh	2	3		
9.	Uttarakhand	2	1		
10.	West Bengal	1	4		
11.	Andhra Pradesh	3			1
12.	Madhya Pradesh	1			
13.	Kerala			1	
14.	Odisha		3		
15.	Himachal Pradesh	1			
16.	Jharkhand		1		
17.	Goa	1			
18.	Puducherry				1
19.	Jammu and Kashmir	1			
Total		26	29	10	7

Annexure D: List of Employers Covered

TABLE 29: LIST OF EMPLOYERS COVERED FOR QUANTITATIVE SURVEYS (INCLUDING STATE WISE COVERAGE)

S. No.	State	Name of the Firm	Category	Subsector
1.	Andhra Pradesh	Panjabi Dhaba	Unorganized	Food Services
2.	Andhra Pradesh	Manasa Food Court	Unorganized	Food Services
3.	Andhra Pradesh	Venkataraman Travels	Unorganized	Tourism – Tour and travel
4.	Andhra Pradesh	Rehmula Restaurant	Organized	Food Services

S. No.	State	Name of the Firm	Category	Subsector
5.	Andhra Pradesh	Swapna. Hotel	Unorganized	Hotels
6.	Andhra Pradesh	Ganapati Hotel	Organized	Hotels
7.	Andhra Pradesh	Bheerappa Dabha	Unorganized	Food Services
8.	Andhra Pradesh	Sahasri Service	Unorganized	Food Services
9.	Andhra Pradesh	Best Western Plus Tejvivaan	Organized	Hotels
10.	Andhra Pradesh	Jyothifood Cort	Organized	Food Services
11.	Andhra Pradesh	Fortune Select Grand Ridge -	Organized	Hotels
12.	Andhra Pradesh	Ratna Tours And Travels Pvt.	Unorganized	Tourism – Tour and travel
13.	Andhra Pradesh	Krishnaveni Catering	Unorganized	Food Services
14.	Andhra Pradesh	Sunil Turos And Travels	Unorganized	Hotels
15.	Andhra Pradesh	Jr Tours And Traveling Pvt.Lmt	Unorganized	Tourism – Tour and travel
16.	Andhra Pradesh	Gressmentoruium	Unorganized	Food Services
17.	Andhra Pradesh	BW Tirupati	Organized	Hotels
18.	Andhra Pradesh	Sulochana Egency	Unorganized	Facilities Management
19.	Andhra Pradesh	Renest Hotels By Unique Group	Organized	Hotels
20.	Andhra Pradesh	Kaverifood Court	Organized	Food Services
21.	Andhra Pradesh	BW Ramachandran	Organized	Hotels
22.	Andhra Pradesh	Pai Viceroy	Organized	Hotels
23.	Andhra Pradesh	Four Points By Sheraton Visakhapatnam	Organized	Hotels
24.	Andhra Pradesh	Keys Select Hotel Visakhapatnam	Organized	Hotels
25.	Andhra Pradesh	Sruthi Travels	Unorganized	Tourism – Tour and travel
26.	Andhra Pradesh	The Gateway Hotel - Visakhapatnam	Organized	Hotels
27.	Assam	Special Ours	Unorganized	Food Services
28.	Assam	Tour Transport	Unorganized	Tourism – Tour and travel
29.	Assam	Budget Hotel	Unorganized	Hotels
30.	Assam	Sanju Enterprises	Unorganized	Hotels
31.	Assam	The Gateway Hotel	Organized	Hotels
32.	Assam	Hotel Grand Starline	Organized	Hotels
33.	Assam	Vishwaratna Hotel	Organized	Hotels
34.	Assam	Novotel Guwahati G S Road	Organized	Hotels
35.	Bihar	Ruchi Restaurant	Organized	Hotels
36.	Bihar	Mohan Farm	Unorganized	Food Services
37.	Bihar	Gopal Mistan Hotel	Unorganized	Hotels
38.	Bihar	Gokul Mistan Bhandar	Unorganized	Food Services
39.	Bihar	Mamta Hotel	Unorganized	Hotels
40.	Bihar	Shreeram Hotel	Unorganized	Hotels
41.	Bihar	Food Plaza	Unorganized	Food Services
42.	Bihar	Surya Food Plaza	Unorganized	Food Services

S. No.	State	Name of the Firm	Category	Subsector
43.	Bihar	Royal Food Plaza	Unorganized	Food Services
44.	Bihar	The Meera Hotel	Unorganized	Hotels
45.	Bihar	Mani Hotel	Unorganized	Hotels
46.	Bihar	Patliputra	Unorganized	Hotels
47.	Bihar	Lemon Tree	Organized	Hotels
48.	Daman and Diu	Zaika Caterers	Unorganized	Food Services
49.	Daman and Diu	Tomar Facility Services And Management	Unorganized	Facilities Management
50.	Daman and Diu	Fly Worldwide Tours And Travels	Unorganized	Tourism – Tour and travel
51.	Daman and Diu	Hotel Brighton	Unorganized	Hotels
52.	Daman and Diu	Hotel Sea Rock Villa	Organized	Hotels
53.	Delhi NCR	Swagatam Tours Pvt Ltd	Organized	Tourism – Tour and travel
54.	Delhi NCR	Signum Hotels And Resorts	Organized	Hotels
55.	Delhi NCR	Accor India And South Asia	Organized	Hotels
56.	Delhi NCR	Radisson Hotels	Organized	Hotels
57.	Delhi NCR	Marriott Hotels India	Organized	Hotels
58.	Delhi NCR	Mahindra Holidays And Resorts	Organized	Hotels
59.	Delhi NCR	Sarovar Hotels Pvt. Ltd.	Organized	Hotels
60.	Delhi NCR	The Lemon Tree Hotel Company	Organized	Hotels
61.	Delhi NCR	Epicurian Foods Pvt Ltd	Organized	Food Services
62.	Delhi NCR	Pan India Food Solutions Pvt.Ltd	Organized	Food Services
63.	Delhi NCR	The Lodhi Hotel	Organized	Hotels
64.	Delhi NCR	Burman Hospitality Pvt Ltd	Organized	Food Services
65.	Delhi NCR	Cruise Masters	Organized	Cruise Liners – cruise ships
66.	Goa	Zuri Hotels	Unorganized	Hotels
67.	Goa	Mums Kitchen Ethnic World Cuisines Private Limited	Organized	Food Services
68.	Goa	Le Meredian Goa	Organized	Hotels
69.	Goa	Resort De Coraco	Unorganized	Hotels
70.	Goa	Span Hotel	Unorganized	Hotels
71.	Goa	Azaya Hotel	Unorganized	Hotels
72.	Goa	Buga Beach Hotel Goa	Unorganized	Hotels
73.	Goa	Kenilworth Hotel	Unorganized	Hotels
74.	Goa	Cora Vela Beach Resort	Organized	Hotels
75.	Goa	Panjim Boat Cruise	Organized	Cruise Liners – cruise ships
76.	Gujarat	The Spicy Street	Unorganized	Food Services
77.	Gujarat	Shivsakti Tours	Organized	Tourism – Tour and travel
78.	Gujarat	Chamunda Tours And Travels	Unorganized	Tourism – Tour and travel
79.	Gujarat	Sai Home Stay	Unorganized	Hotels

S. No.	State	Name of the Firm	Category	Subsector
80.	Gujarat	Dosti Home Staye Narmada	Unorganized	Hotels
81.	Gujarat	Aahna Lifestyle Private Limited	Organized	Facilities Management
82.	Gujarat	Unity Green Resort	Unorganized	Hotels
83.	Gujarat	Hotel Manav	Unorganized	Food Services
84.	Gujarat	S. G Travels	Unorganized	Tourism – Tour and travel
85.	Gujarat	Pink Travels	Unorganized	Tourism – Tour and travel
86.	Gujarat	Sardar Patel Unity Hotel	Unorganized	Hotels
87.	Gujarat	Ananya Hotel	Unorganized	Hotels
88.	Gujarat	Vardayni Travels	Unorganized	Tourism – Tour and travel
89.	Gujarat	Hotel Shree Ganesh	Unorganized	Hotels
90.	Gujarat	Hotel Doha	Unorganized	Hotels
91.	Gujarat	Hotel Wood	Organized	Hotels
92.	Gujarat	Hotel Kartik	Unorganized	Food Services
93.	Gujarat	Mayur Restaurant-2	Organized	Food Services
94.	Gujarat	Hotel Bapasaritam	Organized	Hotels
95.	Gujarat	Hotel Sumery	Organized	Hotels
96.	Gujarat	Hotel Somnath	Unorganized	Hotels
97.	Gujarat	Hotel Chamunda	Organized	Food Services
98.	Gujarat	Hotel Triveni Darshan	Organized	Hotels
99.	Gujarat	Toral Hotel	Unorganized	Hotels
100.	Gujarat	Hotel Relish	Unorganized	Hotels
101.	Gujarat	Hotel Shubh	Organized	Hotels
102.	Gujarat	Galex Hotel Unity	Unorganized	Hotels
103.	Gujarat	Radhe Krishna Tourism	Unorganized	Tourism – Tour and travel
104.	Gujarat	Hotel Lord In	Organized	Hotels
105.	Gujarat	Hotel Line	Organized	Hotels
106.	Gujarat	Hotel Dwaravati	Organized	Hotels
107.	Gujarat	Leena Resort	Organized	Hotels
108.	Gujarat	Hotel Kavya	Organized	Hotels
109.	Gujarat	Galaxy Hotel	Unorganized	Hotels
110.	Gujarat	Lords Plaza	Organized	Hotels
111.	Gujarat	The Amore Banquets Hotel	Unorganized	Hotels
112.	Gujarat	Amisha International Hotel	Organized	Hotels
113.	Gujarat	The Grand Bhagwati Hotel	Organized	Hotels
114.	Gujarat	Goverdhan Greens Holidays Pvt Ltd	Organized	Tourism – Tour and travel
115.	Gujarat	Lemon Tree Premier Dwarka	Organized	Hotels
116.	Gujarat	Courtyard By Marriott Hotel	Organized	Hotels
117.	Gujarat	Fern Dwarka	Organized	Hotels

S. No.	State	Name of the Firm	Category	Subsector
118.	Himachal Pradesh	Vafhz Food Hub	Unorganized	Food Services
119.	Himachal Pradesh	Peepo Restaurant	Unorganized	Food Services
120.	Himachal Pradesh	Hotel Narayan	Unorganized	Hotels
121.	Himachal Pradesh	Himalaya Hill Cottage	Unorganized	Hotels
122.	Himachal Pradesh	Snow Trail Resort	Organized	Hotels
123.	Himachal Pradesh	Ishar Sweets And Fast Food	Unorganized	Food Services
124.	Himachal Pradesh	Kamdhenu Restaurant And Guest House	Organized	Food Services
125.	Himachal Pradesh	The Sagun Palace	Organized	Hotels
126.	Himachal Pradesh	Snow View Resort	Unorganized	Hotels
127.	Himachal Pradesh	Hotel City Heart	Organized	Hotels
128.	Himachal Pradesh	Regenta Inn By Riverside	Unorganized	Hotels
129.	Himachal Pradesh	Clarks Inn, Kangra	Organized	Hotels
130.	Himachal Pradesh	Stone Wood Mountain Resort	Organized	Hotels
131.	Himachal Pradesh	Regenta Exotica Dharamshala	Unorganized	Hotels
132.	Himachal Pradesh	Justa Birding, Dharamshala	Unorganized	Hotels
133.	Himachal Pradesh	Justa Hotel	Unorganized	Hotels
134.	Himachal Pradesh	The Victory Resort	Unorganized	Hotels
135.	Himachal Pradesh	The Orchard Green	Organized	Hotels
136.	Himachal Pradesh	Nature Vilas Sarovor Portico	Organized	Hotels
137.	Himachal Pradesh	Indraprastha Resort Dalhousie	Organized	Hotels
138.	Himachal Pradesh	Best Western Dalhousie	Unorganized	Hotels
139.	Himachal Pradesh	JK Clarks Exotica Dalhousie	Organized	Hotels
140.	Himachal Pradesh	Club Mahindra	Organized	Hotels
141.	Himachal Pradesh	Hotel Wildflower Oberai	Organized	Hotels
142.	Himachal Pradesh	Destination	Unorganized	Hotels
143.	Jammu and Kashmir	Grill And Cafe	Unorganized	Food Services
144.	Jammu and Kashmir	Coffee Bravageworker	Unorganized	Food Services
145.	Jammu and Kashmir	Pavilion	Organized	Food Services
146.	Jammu and Kashmir	Aki Travel And Planners	Unorganized	Tourism – Tour and travel
147.	Jammu and Kashmir	Bismillah Hotel	Unorganized	Hotels

S. No.	State	Name of the Firm	Category	Subsector
148.	Jammu and Kashmir	Dar and Sons	Unorganized	Food Services
149.	Jammu and Kashmir	MBA Chai Wala	Organized	Food Services
150.	Jammu and Kashmir	Arif Cafe	Unorganized	Food Services
151.	Jammu and Kashmir	Mohmadi Hotel	Unorganized	Hotels
152.	Jammu and Kashmir	Comrade Inn	Organized	Food Services
153.	Jammu and Kashmir	Grand Mumtaz	Unorganized	Hotels
154.	Jammu and Kashmir	Cafe	Unorganized	Food Services
155.	Jammu and Kashmir	The Valley View	Unorganized	Hotels
156.	Jammu and Kashmir	Comrade Inn Pvt Ltd	Organized	Hotels
157.	Jharkhand	Saraswati Panda Ashram	Unorganized	Hotels
158.	Jharkhand	Rajmahal Dhaba	Unorganized	Food Services
159.	Jharkhand	Shivam Bhojnalaya	Unorganized	Food Services
160.	Jharkhand	Hotel Shree Hari	Organized	Hotels
161.	Jharkhand	Hotel Rajdhani Plaza	Organized	Hotels
162.	Jharkhand	Hotel Lord Shiva	Unorganized	Hotels
163.	Jharkhand	Hotel Lali Residency	Unorganized	Hotels
164.	Jharkhand	Hotel Royal	Unorganized	Hotels
165.	Jharkhand	Park Prime	Organized	Hotels
166.	Jharkhand	Chanakya BNR Hotel	Organized	Hotels
167.	Jharkhand	Hotel Genista Inn	Unorganized	Hotels
168.	Karnataka	Mahadev Tourist	Unorganized	Tourism – Tour and travel
169.	Karnataka	Shri Sayi Sagar Hotel	Organized	Food Services
170.	Karnataka	Hari Prasad Hotel	Unorganized	Food Services
171.	Karnataka	Nandini Hotel	Unorganized	Hotels
172.	Karnataka	Shabari Telecable Network Pvt	Organized	Facilities Management
173.	Karnataka	The Quorum Hotel	Organized	Hotels
174.	Karnataka	Mohamda Egg Rice Hotel	Unorganized	Food Services
175.	Karnataka	Bengaluru Restaurant	Unorganized	Hotels
176.	Karnataka	Udipi Sagar Hotel	Organized	Hotels
177.	Karnataka	Ama Plantation Trails	Organized	Hotels
178.	Karnataka	Apollo Power Systems Pvt Ltd	Organized	Facilities Management
179.	Karnataka	247 Facility Services Pvt Ltd	Organized	Facilities Management
180.	Karnataka	Shankar Electricals	Organized	Facilities Management
181.	Karnataka	Siesta Hospitality Services Limited	Organized	Facilities Management
182.	Kerala	Ai Baik Restaurant	Organized	Tourism – Tour and travel
183.	Kerala	Calicut Homestay	Unorganized	Hotels
184.	Kerala	Nizam Homestay	Unorganized	Hotels

S. No.	State	Name of the Firm	Category	Subsector
185.	Kerala	Holymount Travel And Leisure	Organized	Tourism – Tour and travel
186.	Kerala	PSG Catering Services	Unorganized	Food Services
187.	Kerala	Gokitetravels And Tours	Unorganized	Tourism – Tour and travel
188.	Kerala	Narmada Homestay	Unorganized	Hotels
189.	Kerala	Treat Catering Services	Unorganized	Food Services
190.	Kerala	Velavan Tours And Travels	Organized	Tourism – Tour and travel
191.	Kerala	The Great India Tour Company Pvt. Ltd.	Organized	Tourism – Tour and travel
192.	Kerala	Its Tours And Travels	Organized	Tourism – Tour and travel
193.	Kerala	Serenity Home	Unorganized	Hotels
194.	Kerala	Mom and Pop Thyparambil Heritage	Organized	Hotels
195.	Kerala	Jazeera Homemade Food	Unorganized	Food Services
196.	Kerala	Pipli Foods	Organized	Food Services
197.	Kerala	Shree Gokul Residency Hotel	Organized	Hotels
198.	Kerala	Four Points By Sheraton Kochi Infopark	Organized	Hotels
199.	Kerala	Gokulam Park Inn	Organized	Hotels
200.	Kerala	Jay Homestay	Unorganized	Hotels
201.	Kerala	Baywatch Beach Resort	Organized	Hotels
202.	Kerala	South Guru Tours And Travels	Organized	Tourism – Tour and travel
203.	Kerala	AVM Facility Management Services	Unorganized	Facilities Management
204.	Kerala	Café Cateliya	Organized	Food Services
205.	Kerala	Keys Select Hotel Thiruvananthapuram	Organized	Hotels
206.	Kerala	Mallaparamresidency	Unorganized	Hotels
207.	Kerala	Olive Downtown Hotel	Organized	Hotels
208.	Kerala	V Tour Travels	Unorganized	Tourism – Tour and travel
209.	Kerala	Armana Restaurant Food Service	Organized	Food Services
210.	Kerala	Bad man facility services	Unorganized	Facilities Management
211.	Kerala	Blue Hill Holiday Travel Tours	Organized	Tourism – Tour and travel
212.	Kerala	Amber Dale	Organized	Hotels
213.	Kerala	VLX Realtors Services	Unorganized	Facilities Management
214.	Kerala	Maranat Mana Heritage Homestay	Organized	Hotels
215.	Kerala	Sasthapuri Group Of Hotel	Organized	Hotels
216.	Kerala	Hotel North Seven	Organized	Hotels
217.	Kerala	Woodbine Foliage	Organized	Hotels
218.	Kerala	Hotel Elite International	Organized	Hotels
219.	Kerala	Port Muziris A Tribute Portfolio Hotel Unit Of Qasr Hotels Co	Organized	Hotels
220.	Kerala	Redbell Suites	Unorganized	Hotels
221.	Kerala	Fog Resorts And Spa	Organized	Hotels

S. No.	State	Name of the Firm	Category	Subsector
222.	Kerala	Fion Facility Services	Unorganized	Facilities Management
223.	Kerala	Hotel Lake Palace	Organized	Hotels
224.	Kerala	Spark Facility Management	Unorganized	Facilities Management
225.	Andaman and Nicobar	Junglee Mirchy	Unorganized	Food Services
226.	Andaman and Nicobar	Safari Homestays	Unorganized	Hotels
227.	Andaman and Nicobar	Serene Palace	Unorganized	Hotels
228.	Andaman and Nicobar	Hotel Aries	Unorganized	Hotels
229.	Andaman and Nicobar	Anand Tours And Travels	Unorganized	Tourism – Tour and travel
230.	Madhya Pradesh	Mukesh Dhaba	Unorganized	Food Services
231.	Madhya Pradesh	Sabjiwala dhaba	Unorganized	Food Services
232.	Madhya Pradesh	Home Stay	Unorganized	Hotels
233.	Madhya Pradesh	Jain Hotel	Unorganized	Food Services
234.	Madhya Pradesh	Ansari Hotel	Organized	Hotels
235.	Madhya Pradesh	Mangal Hotel	Unorganized	Food Services
236.	Madhya Pradesh	Apna Sweets	Unorganized	Food Services
237.	Madhya Pradesh	Singh Mess	Unorganized	Food Services
238.	Madhya Pradesh	Sikarwar Travels	Unorganized	Tourism – Tour and travel
239.	Madhya Pradesh	Raj Rasoi	Unorganized	Food Services
240.	Madhya Pradesh	Baldev Sweet And Restaurant Hotel	Organized	Food Services
241.	Madhya Pradesh	Hotel Taj Khajuraho Panna	Organized	Hotels
242.	Madhya Pradesh	Radhey	Unorganized	Tourism – Tour and travel
243.	Madhya Pradesh	Chistiya Tour And Travels	Unorganized	Tourism – Tour and travel
244.	Madhya Pradesh	Food Service Point	Unorganized	Food Services
245.	Madhya Pradesh	Sweets Bakery	Organized	Food Services
246.	Madhya Pradesh	MH Restaurant	Unorganized	Food Services
247.	Madhya Pradesh	Seagal Services	Unorganized	Facilities Management
248.	Madhya Pradesh	Dining Hotel	Unorganized	Hotels
249.	Madhya Pradesh	Bethak Chai Longest Cafe	Unorganized	Food Services
250.	Madhya Pradesh	Hotel Mohan Vilash	Unorganized	Hotels
251.	Madhya Pradesh	Tatkhat Restaurant	Unorganized	Food Services
252.	Madhya Pradesh	Hichcki Cafe	Organized	Food Services

S. No.	State	Name of the Firm	Category	Subsector
253.	Madhya Pradesh	Imperial Hotel	Organized	Hotels
254.	Madhya Pradesh	Ganga Garden	Organized	Hotels
255.	Madhya Pradesh	Kaidi Khana Restaurant	Organized	Food Services
256.	Madhya Pradesh	Maha Ganesh Institute And MP Online	Unorganized	Tourism – Tour and travel
257.	Madhya Pradesh	Aliya Tour And Travels	Organized	Tourism – Tour and travel
258.	Madhya Pradesh	Surbhi Garden	Organized	Hotels
259.	Madhya Pradesh	Hotel City Inn	Unorganized	Hotels
260.	Madhya Pradesh	Dadi Ki Kutiya	Unorganized	Food Services
261.	Madhya Pradesh	Narmada Hotel	Organized	Hotels
262.	Madhya Pradesh	Meghdoot Garden	Unorganized	Hotels
263.	Madhya Pradesh	The For Lake	Unorganized	Hotels
264.	Madhya Pradesh	Spicy Treat Hotel	Unorganized	Hotels
265.	Madhya Pradesh	Umang Garden	Unorganized	Hotels
266.	Madhya Pradesh	Chatore Restaurant	Organized	Food Services
267.	Madhya Pradesh	Shree Devnarayan Restaurant	Unorganized	Food Services
268.	Madhya Pradesh	Shagun Garden	Organized	Hotels
269.	Madhya Pradesh	Asoka Gold	Unorganized	Hotels
270.	Madhya Pradesh	Kasturi Garden	Organized	Hotels
271.	Madhya Pradesh	Shivhare Dhaba	Unorganized	Hotels
272.	Madhya Pradesh	Sweets And Food	Unorganized	Food Services
273.	Madhya Pradesh	Hotel R	Unorganized	Hotels
274.	Madhya Pradesh	The Handi Restaurant	Organized	Food Services
275.	Madhya Pradesh	Vijan Mahal	Unorganized	Food Services
276.	Madhya Pradesh	Gujral Hotels Pvt Ltd	Organized	Hotels
277.	Maharashtra	Shree Ganesh Tour And Travel	Organized	Tourism – Tour and travel
278.	Maharashtra	Bansuri Pure Veg	Unorganized	Food Services
279.	Maharashtra	Yellow Chilly Restaurant	Organized	Food Services
280.	Maharashtra	CLR Facility Services Pvt. Ltd	Organized	Facilities Management
281.	Maharashtra	Hotel Lake View	Organized	Hotels
282.	Maharashtra	Hotel Preeti	Organized	Food Services
283.	Maharashtra	Nikman Tour And Travels	Unorganized	Tourism – Tour and travel
284.	Maharashtra	Savali Management Consultancy	Organized	Facilities Management

S. No.	State	Name of the Firm	Category	Subsector
285.	Maharashtra	Suvarna Group	Unorganized	Facilities Management
286.	Maharashtra	Hotel Maharaja	Organized	Hotels
287.	Maharashtra	Ak Tours And Travel	Unorganized	Tourism – Tour and travel
288.	Maharashtra	Capital Tours And Travels	Unorganized	Tourism – Tour and travel
289.	Maharashtra	Kuber Hotel	Organized	Hotels
290.	Maharashtra	Spree Shivai	Organized	Food Services
291.	Maharashtra	Sai Food	Unorganized	Food Services
292.	Maharashtra	Logicon Facility Management PV	Organized	Facilities Management
293.	Maharashtra	The Ritz Carlton Pune	Organized	Hotels
294.	Maharashtra	Keys Select Hotel Pimpri	Organized	Hotels
295.	Maharashtra	Della Adventure and Resorts Pvt Ltd	Organized	Hotels
296.	Maharashtra	Hotel Radhika Palace	Organized	Hotels
297.	Maharashtra	Keys Select Hotel Nestor	Organized	Hotels
298.	Maharashtra	Hotels S Food Park	Organized	Hotels
299.	Maharashtra	Speciality Restaurants Ltd	Organized	Food Services
300.	Maharashtra	Nikhil Caterers	Organized	Food Services
301.	Maharashtra	Blue Diamond	Organized	Hotels
302.	Maharashtra	Suruchi Tours And Travels	Unorganized	Tourism – Tour and travel
303.	Maharashtra	Facilities Tour And Travels Pvt Ltd	Unorganized	Tourism – Tour and travel
304.	Maharashtra	Food King Kitchen	Unorganized	Food Services
305.	Maharashtra	Bhavyanash Tiffin Services	Unorganized	Food Services
306.	Maharashtra	Ramji Caterers	Unorganized	Food Services
307.	Maharashtra	T3 Tourism Tours And Travel Agency	Unorganized	Tourism – Tour and travel
308.	Maharashtra	Sainath Food Services	Unorganized	Food Services
309.	Maharashtra	Mahesh Lunch Home	Organized	Food Services
310.	Maharashtra	Chetna Caterers	Organized	Food Services
311.	Maharashtra	Elsa Food Services	Unorganized	Food Services
312.	Maharashtra	Samruddhi Caterers And Food Service	Unorganized	Food Services
313.	Maharashtra	The Fern Residency	Unorganized	Hotels
314.	Maharashtra	Hotel Dwarka	Unorganized	Hotels
315.	Maharashtra	Hotel Mirchi	Unorganized	Hotels
316.	Maharashtra	Hotel Royal Heritage	Unorganized	Hotels
317.	Maharashtra	Hotel Aurus	Unorganized	Hotels
318.	Maharashtra	Wayne Food And Beverages	Unorganized	Food Services
319.	Maharashtra	Lite Bite Foods	Organized	Food Services
320.	Maharashtra	Ekveera Tours And Travels	Unorganized	Tourism – Tour and travel
321.	Maharashtra	Airpay Payment Services	Organized	Facilities Management
322.	Maharashtra	Balaji Holiday Home	Unorganized	Hotels

S. No.	State	Name of the Firm	Category	Subsector
323.	Maharashtra	Kailasa Speciality Cuisine Pvt. Ltd.	Organized	Food Services
324.	Maharashtra	MTDC Hotel Aurangabad	Organized	Hotels
325.	Maharashtra	Bipin Facility Management	Unorganized	Facilities Management
326.	Maharashtra	Hotel Ashish	Unorganized	Hotels
327.	Maharashtra	NFS Facility Services	Unorganized	Facilities Management
328.	Maharashtra	Hotel Nagpur Inn	Unorganized	Hotels
329.	Maharashtra	The Gateway Hotel	Organized	Hotels
330.	Maharashtra	Anchaviyo Resort	Organized	Hotels
331.	Maharashtra	Hotel Samaira Residency	Unorganized	Hotels
332.	Maharashtra	Security Services Pvt	Unorganized	Facilities Management
333.	Maharashtra	Hotel Gulmohar Pride	Unorganized	Hotels
334.	Maharashtra	Myo Hospitality	Organized	Facilities Management
335.	Maharashtra	Bawa Group Of Companies	Organized	Facilities Management
336.	Maharashtra	Jungle Resort	Organized	Hotels
337.	Maharashtra	One Stop Facility Management	Organized	Facilities Management
338.	Maharashtra	Reliance Industries Limited	Organized	Facilities Management
339.	Maharashtra	Trident Bandra Kurla Mumbai	Organized	Hotels
340.	Meghalaya	Bies Suchiang	Unorganized	Food Services
341.	Meghalaya	CML Collection	Unorganized	Facilities Management
342.	Meghalaya	Fast Food	Unorganized	Food Services
343.	Meghalaya	Homestay	Unorganized	Hotels
344.	Meghalaya	Home Away From Home Guesthouse	Unorganized	Hotels
345.	Meghalaya	Food Stall	Unorganized	Food Services
346.	Meghalaya	Cool Kicks	Unorganized	Facilities Management
347.	Meghalaya	Lily Homestay	Unorganized	Hotels
348.	Meghalaya	Homestay	Unorganized	Hotels
349.	Meghalaya	Fast Food	Unorganized	Food Services
350.	Meghalaya	Raj Hotel	Unorganized	Food Services
351.	Meghalaya	Gr Orchid Guesthouse	Organized	Hotels
352.	Meghalaya	BH Dabha	Unorganized	Food Services
353.	Meghalaya	Spinnin' Wheelz	Unorganized	Facilities Management
354.	Odisha	M Power Tour and Travels	Unorganized	Tourism – Tour and travel
355.	Odisha	Ananta Gopal Tour and Travels	Unorganized	Tourism – Tour and travel
356.	Odisha	Hara Tiffin Centre	Unorganized	Food Services
357.	Odisha	Flagship Hotel	Unorganized	Hotels
358.	Odisha	Cuttack Cruise	Organized	Cruise Liners – cruise ships
359.	Odisha	Mahadev Indo Services	Unorganized	Facilities Management
360.	Odisha	Ambica Residency	Unorganized	Hotels
361.	Odisha	Jagatsinghpur Cruise	Unorganized	Cruise Liners – cruise ships

S. No.	State	Name of the Firm	Category	Subsector
362.	Odisha	Ganjam Cruise	Organized	Cruise Liners – cruise ships
363.	Odisha	Ambica Residency	Organized	Hotels
364.	Odisha	Royal Treat	Unorganized	Food Services
365.	Odisha	Utkal Facility Services Pvt. Ltd	Unorganized	Facilities Management
366.	Odisha	Shree Jaganath Hotel	Unorganized	Hotels
367.	Odisha	Mahalaxmi Catering Service	Unorganized	Food Services
368.	Odisha	Hotel Sagar	Unorganized	Hotels
369.	Odisha	Hotel Akbari	Unorganized	Hotels
370.	Odisha	Ambika Residency	Unorganized	Hotels
371.	Odisha	Ambica Hotel	Unorganized	Hotels
372.	Odisha	S N Tour and Travels	Unorganized	Tourism – Tour and travel
373.	Odisha	Hotel Ashoka	Unorganized	Hotels
374.	Odisha	Sagar Hotel	Unorganized	Hotels
375.	Odisha	Hotel Dwarika	Organized	Hotels
376.	Odisha	Ganesh Residency	Unorganized	Hotels
377.	Odisha	Sarkar Hotel	Unorganized	Hotels
378.	Odisha	Sagar Hotel	Unorganized	Hotels
379.	Odisha	Flagship Hotel	Unorganized	Hotels
380.	Odisha	Grand Residency	Organized	Hotels
381.	Puducherry (Pondicherry)	Hotel Le Royal Park Pondicherry	Organized	Hotels
382.	Puducherry (Pondicherry)	Manis Photography	Unorganized	Tourism – Tour and travel
383.	Puducherry (Pondicherry)	Tea Buns	Unorganized	Food Services
384.	Puducherry (Pondicherry)	Sri Vinayaga Residency	Unorganized	Hotels
385.	Rajasthan	Pratap Mahal	Organized	Hotels
386.	Rajasthan	Chokhi Dhani - The Palace Hotel	Organized	Food Services
387.	Rajasthan	The Daavat	Organized	Food Services
388.	Rajasthan	The Royal Melange Beacon Ajmer	Organized	Hotels
389.	Rajasthan	Shrinath Case Counter	Unorganized	Food Services
390.	Rajasthan	Mx Travel	Unorganized	Tourism – Tour and travel
391.	Rajasthan	Kanha Restaurant	Unorganized	Food Services
392.	Rajasthan	Chips and Chapati	Organized	Food Services
393.	Rajasthan	Rajaram	Unorganized	Facilities Management
394.	Rajasthan	Shri Dev Cash Counter	Unorganized	Food Services
395.	Rajasthan	Salvi Restaurant	Unorganized	Food Services
396.	Rajasthan	Brahmani Enterprise	Unorganized	Facilities Management
397.	Rajasthan	Radhe Tour	Unorganized	Tourism – Tour and travel
398.	Rajasthan	Markey Momo	Unorganized	Food Services
399.	Rajasthan	The Sawai Madhopur Lodge	Organized	Hotels

S. No.	State	Name of the Firm	Category	Subsector
400.	Rajasthan	Balaji Dhaba	Unorganized	Food Services
401.	Rajasthan	Swaroop Lake View Restaurant	Unorganized	Hotels
402.	Rajasthan	Sai Ram	Unorganized	Facilities Management
403.	Rajasthan	Balaji Restaurant	Unorganized	Food Services
404.	Rajasthan	Park Regis Jaipur	Organized	Hotels
405.	Rajasthan	Hotel Diggi Palace	Organized	Hotels
406.	Rajasthan	Chokhi Dhani - The Ethnic Village Resort	Organized	Food Services
407.	Rajasthan	Neemrana Hotels	Organized	Hotels
408.	Sikkim	Homestay	Unorganized	Hotels
409.	Sikkim	Homestay	Unorganized	Hotels
410.	Sikkim	Homestay	Unorganized	Hotels
411.	Sikkim	Tshering Tours and Travel	Organized	Tourism – Tour and travel
412.	Sikkim	Mamta Homestay	Unorganized	Hotels
413.	Sikkim	Homestays	Unorganized	Hotels
414.	Sikkim	Jn Fast Food	Unorganized	Food Services
415.	Sikkim	Restaurant	Unorganized	Food Services
416.	Sikkim	Food and Beverages	Unorganized	Food Services
417.	Sikkim	Cafe Refule	Unorganized	Food Services
418.	Sikkim	Apricot Homestay	Unorganized	Hotels
419.	Sikkim	Rai Hotel	Organized	Hotels
420.	Sikkim	Dogra Inn Hotel	Organized	Hotels
421.	Sikkim	Hosanna Restaurant	Unorganized	Food Services
422.	Sikkim	Mount View Hotel	Organized	Hotels
423.	Sikkim	Little Sikkim	Unorganized	Hotels
424.	Sikkim	Divine Grace	Unorganized	Hotels
425.	Sikkim	Hotel Highlander	Unorganized	Hotels
426.	Sikkim	Sibin Cart Pvt Limited	Organized	Facilities Management
427.	Tamil Nadu	Benix Electronics	Organized	Facilities Management
428.	Tamil Nadu	JK Hostel	Unorganized	Hotels
429.	Tamil Nadu	Hotel Priya	Organized	Food Services
430.	Tamil Nadu	Ramya Cafe	Unorganized	Food Services
431.	Tamil Nadu	Mario Hotel	Organized	Hotels
432.	Tamil Nadu	Gayathri Mes	Unorganized	Food Services
433.	Tamil Nadu	Murugan Dhaba	Unorganized	Hotels
434.	Tamil Nadu	Ayyappaan. Cottage	Organized	Hotels
435.	Tamil Nadu	Moral Park	Unorganized	Tourism – Tour and travel
436.	Tamil Nadu	Ganapathi Stall	Unorganized	Hotels
437.	Tamil Nadu	Lakshmi Illam	Unorganized	Food Services
438.	Tamil Nadu	Saran Cafe	Unorganized	Food Services

S. No.	State	Name of the Firm	Category	Subsector
439.	Tamil Nadu	Balaji Bhavan	Unorganized	Hotels
440.	Tamil Nadu	Kanga Restaurant	Unorganized	Food Services
441.	Tamil Nadu	Tourism	Unorganized	Tourism – Tour and travel
442.	Tamil Nadu	Nivi Travels	Unorganized	Tourism – Tour and travel
443.	Tamil Nadu	Muhammad Hall	Unorganized	Food Services
444.	Tamil Nadu	Diana World Travel Pvt. Ltd.	Organized	Tourism – Tour and travel
445.	Tamil Nadu	Kay Em Spectra Luxury Hotel And Resort Pvt Ltd	Organized	Hotels
446.	Tamil Nadu	Sterling Fern Hill	Organized	Hotels
447.	Tamil Nadu	Sterling Holiday Resorts Limited.	Organized	Hotels
448.	Tamil Nadu	Shalom Hostel	Unorganized	Hotels
449.	Tamil Nadu	Crowne Plaza	Organized	Hotels
450.	Tamil Nadu	Ayur Yatra. In	Organized	Tourism – Tour and travel
451.	Tamil Nadu	Karaikudi Hotel	Unorganized	Hotels
452.	Tamil Nadu	Aachis Hotel	Organized	Hotels
453.	Tamil Nadu	East Hotel	Unorganized	Hotels
454.	Telangana	Andavar Diffen Centre	Unorganized	Food Services
455.	Telangana	SKM travels	Unorganized	Tourism – Tour and travel
456.	Telangana	Sha Hotel	Unorganized	Hotels
457.	Telangana	Sas Hotel	Unorganized	Hotels
458.	Telangana	Vedha Travels	Unorganized	Tourism – Tour and travel
459.	Telangana	Senthooran Hospitality	Unorganized	Facilities Management
460.	Telangana	Dg Travels	Organized	Tourism – Tour and travel
461.	Telangana	Red Fox Hotel	Organized	Hotels
462.	Telangana	Saravanas Hotel	Organized	Hotels
463.	Telangana	Ms Hotel	Unorganized	Food Services
464.	Telangana	Kapston	Organized	Facilities Management
465.	Telangana	Suchirindia Hotels and Resorts Pvt. Ltd.	Organized	Hotels
466.	Telangana	VVRS India Pvt. Ltd.	Organized	Facilities Management
467.	Telangana	BW Ashoka	Organized	Hotels
468.	Uttar Pradesh	De Paris	Organized	Food Services
469.	Uttar Pradesh	Kalim Jan Seva	Unorganized	Facilities Management
470.	Uttar Pradesh	VNS Live Studio	Organized	Food Services
471.	Uttar Pradesh	Hotel Kanha Shyam	Unorganized	Hotels
472.	Uttar Pradesh	Audra Hotel	Unorganized	Hotels
473.	Uttar Pradesh	A P Palace	Organized	Hotels
474.	Uttar Pradesh	Panchsheel Hotel	Unorganized	Hotels
475.	Uttar Pradesh	Hotel Moon Agra	Unorganized	Hotels

S. No.	State	Name of the Firm	Category	Subsector
476.	Uttar Pradesh	Chanda Hotel	Unorganized	Food Services
477.	Uttar Pradesh	Country Inn Hotel and Resort	Organized	Hotels
478.	Uttar Pradesh	Shivalaya Hotel	Unorganized	Hotels
479.	Uttar Pradesh	Rishabh Hotel	Unorganized	Hotels
480.	Uttar Pradesh	New Atithi	Unorganized	Hotels
481.	Uttar Pradesh	Bundelkhand Hotel	Unorganized	Hotels
482.	Uttar Pradesh	Hotel Prayag	Unorganized	Hotels
483.	Uttar Pradesh	Amar Yatri Niwas	Organized	Hotels
484.	Uttar Pradesh	Grand	Organized	Hotels
485.	Uttar Pradesh	Howard Plaza - The Fern	Organized	Hotels
486.	Uttar Pradesh	Hotel Radhika Palace	Unorganized	Hotels
487.	Uttar Pradesh	Brijwasi Royal	Organized	Hotels
488.	Uttar Pradesh	Shree Ram Hotel	Unorganized	Hotels
489.	Uttar Pradesh	Hotel Ayodhya	Organized	Hotels
490.	Uttar Pradesh	Lauries	Organized	Food Services
491.	Uttar Pradesh	Basera Vrindavan	Organized	Food Services
492.	Uttar Pradesh	Diamond	Organized	Hotels
493.	Uttar Pradesh	The Ramayana Hotel	Unorganized	Hotels
494.	Uttar Pradesh	Malik	Unorganized	Food Services
495.	Uttar Pradesh	Hotel Madin A Unit Of Lav Laxmi Land Developers Pvt Ltd	Organized	Hotels
496.	Uttar Pradesh	K G N	Unorganized	Hotels
497.	Uttar Pradesh	Vikrang	Unorganized	Tourism – Tour and travel
498.	Uttar Pradesh	Modern	Unorganized	Facilities Management
499.	Uttar Pradesh	Lucky	Unorganized	Hotels
500.	Uttar Pradesh	Galaxy	Organized	Hotels
501.	Uttar Pradesh	Crescent Villa	Organized	Hotels
502.	Uttar Pradesh	Hotel Sundaram Prayagraj	Unorganized	Hotels
503.	Uttar Pradesh	Grand Continental	Organized	Hotels
504.	Uttar Pradesh	Brijwasi Lands Inn	Organized	Hotels
505.	Uttar Pradesh	BW Sagar Sona	Unorganized	Hotels
506.	Uttar Pradesh	Kapoor's	Unorganized	Hotels
507.	Uttar Pradesh	Ginger Hotel	Organized	Hotels
508.	Uttarakhand	Cafe Chica	Unorganized	Food Services
509.	Uttarakhand	Country Inn- Sattal	Organized	Hotels
510.	Uttarakhand	Panwar Restaurant	Unorganized	Tourism – Tour and travel
511.	Uttarakhand	Purohit Restaurant	Unorganized	Food Services
512.	Uttarakhand	Cafe Tree	Unorganized	Food Services
513.	Uttarakhand	Club Mahindra Dancing Waters	Organized	Hotels
514.	Uttarakhand	Tomar House	Unorganized	Tourism – Tour and travel

S. No.	State	Name of the Firm	Category	Subsector
515.	Uttarakhand	Murali Wala	Unorganized	Food Services
516.	Uttarakhand	The Food Factory	Unorganized	Food Services
517.	Uttarakhand	The Shubham Food Plaza	Unorganized	Food Services
518.	Uttarakhand	River Vally	Unorganized	Food Services
519.	Uttarakhand	Tanduri Cafe	Unorganized	Food Services
520.	Uttarakhand	Alka The Lake Side	Organized	Hotels
521.	Uttarakhand	Sweety City	Unorganized	Hotels
522.	Uttarakhand	Himanshu Food Cafe	Unorganized	Food Services
523.	Uttarakhand	Madho Logging House	Unorganized	Hotels
524.	Uttarakhand	Krishna Heritage	Unorganized	Hotels
525.	Uttarakhand	Shree Ram Food Plaza	Unorganized	Food Services
526.	Uttarakhand	Agrwal Hotel	Unorganized	Hotels
527.	Uttarakhand	Aman Chinese And Fast Food	Unorganized	Food Services
528.	Uttarakhand	Goldendeeep	Unorganized	Hotels
529.	Uttarakhand	Hotel Ashirwad	Unorganized	Hotels
530.	Uttarakhand	Hotel Surya	Unorganized	Hotels
531.	Uttarakhand	Shree Garun Ganga	Unorganized	Hotels
532.	West Bengal	Mini Chains Fast Food	Organized	Food Services
533.	West Bengal	Susmita Travel	Unorganized	Tourism – Tour and travel
534.	West Bengal	Rai Fast Food Corner	Unorganized	Food Services
535.	West Bengal	Classic Family Restaurant	Unorganized	Food Services
536.	West Bengal	Gurung Food Plaza	Unorganized	Food Services
537.	West Bengal	Farebi Kitchen	Unorganized	Food Services
538.	West Bengal	Annapurna Bhater Hotel	Unorganized	Food Services
539.	West Bengal	Lively Inn	Unorganized	Food Services
540.	West Bengal	Arshalan Biryani	Unorganized	Food Services
541.	West Bengal	Dolma Resturent	Unorganized	Food Services
542.	West Bengal	A-Z Fast Food.	Organized	Food Services
543.	West Bengal	Innate Voice Tours and Travels	Unorganized	Food Services
544.	West Bengal	Purnima Travels	Organized	Tourism – Tour and travel
545.	West Bengal	Suvidha Tour and Travels	Organized	Tourism – Tour and travel
546.	West Bengal	Sunakhari Homestay	Unorganized	Hotels
547.	West Bengal	Excel Tours	Organized	Tourism – Tour and travel
548.	West Bengal	Medhasree Aarbed Seba Kendra	Unorganized	Food Services
549.	West Bengal	Pramanik Sar Shop	Unorganized	Facilities Management
550.	West Bengal	Mondal Hardwards	Unorganized	Tourism – Tour and travel
551.	West Bengal	Nayek Fishari	Unorganized	Food Services
552.	West Bengal	Raju Food Centre	Unorganized	Food Services

S. No.	State	Name of the Firm	Category	Subsector
553.	Ladakh	Delve	Unorganized	Food Services

Annexure E: Survey Tools

In-depth Interviews

Ministry of Tourism

Tourism and Hospitality Skill Council (THSC) has engaged Price Waterhouse Coopers Pvt. Ltd. to conduct a nation-wide skill gap study for the Tourism and Hospitality sector. This study, as a part of the engagement, seeks to collect up-to-date and reliable data concerning the skill needs of the workforce and the skill offerings by employers within the tourism and hospitality sector. It also aims to address gaps specific to the tourism and hospitality industry, gain insights into industry-specific details, operational procedures, and hiring practices, and explore future aspirations and outlook. Furthermore, the study will assess the industry's willingness to participate in skills training programs, examine migration patterns, and gauge preferences for skill training. To achieve this goal, we plan to conduct in-depth interviews with government departments. This will enable us to gain valuable insights and a holistic understanding of the industry's perspective in the tourism and hospitality sector.

Please remain assured that the responses captured under this study, will not be represented individually, and all the responses will remain confidential.

Purpose of the interview:

- To understand the
 - Skill development needs within tourism and hospitality.
 - Technical and vocational education infrastructure
 - Government policies and regulations for skilling and training of workforce
- To identify
 - Skill gaps within the sector's workforce
 - In-demand job roles and their future outlook
 - The influence of technological advancements on job roles within the sector
 - Necessary adaptations in the skill development ecosystem to align with industry's needs.

Time: 30 minutes

General guidance for conducting the interview:

The purpose of the interview needs to be shared with the interviewee through email communication.

Note: The information provided by the respondent shall only be used for Skill Gap Study and shall be kept highly confidential.

Question	Answer
Name of respondents	
Contact details of the respondent	
Email ID of the respondent	
Designation of the respondent	
Name of the Interviewer	

Question Number

1.	<p>INTRODUCTION</p> <p>What is your department's key roles and responsibilities for the development of tourism and hospitality sector? How has the tourism and hospitality situation changed since COVID-19? What role do economic social environment and institutional arrangements play a role in shaping the tourism policy directions? Which channels does your department follows to promote the tourism (state tourism, in case of state departments and national tourism in case of Ministry of tourism) in your state/country? What impact educational institutions set up and labour market have on the skills development in tourism and hospitality?</p> <p>(Probe to understand the tourism and hospitality domain in India and their respective state, primary objectives regarding skill development, what steps has been followed so far)</p>
2.	<p>POLICY FRAMEWORK</p> <p>What were the tourism and hospitality reforms undertaken in last 5 years on national level and if any, on state level? What are the national government policies and regulations related to skill development and workforce training for tourism and hospitality sector? Are there any government initiatives to support skill developments in tourism and hospitality sector? How do you make sure that graduates/pas outs are employed in the sector and on the other side, industry have manpower they require? What activities you perform to effectively coordinate among the job seekers and employers in this sector? What changes in policy reforms is the government or the department anticipating in the next 5 years?</p> <p>(Probe to understand the tourism and hospitality reforms, educational reforms and labour market reforms affecting the tourism and hospitality sector, impact they have created, challenges faced in implementation, National Tourism Policy)</p>
3.	<p>BUDGET ALLOCATION</p> <p>How much funding is allocated by the Government of India and state governments for promoting tourism at national and state level? How much funding is allocated for upskilling and reskilling the workforce in the tourism and hospitality sector? Have there been any recent budgetary reforms in this context, and what are the allocation channels for these funds? Can you provide insights into the government's future plans and strategies concerning the upskilling of workers? Are there any future budgetary plans to improve the tourism and hospitality sector for skilling and matching the aspirants to employers?</p> <p>(Explore the budgetary aspects related to skill development within the tourism and hospitality sector. Inquire about government-sponsored training and skilling campaigns, as well as any workshops aimed at skill enhancement, how the budget is allocated to various stakeholders, including educational institutes, training service providers, businesses/companies, tourism developers in this sector)</p>
4.	<p>MIGRATION DYNAMICS</p> <p>Could you provide insights into the internal migration patterns within the country? Which specific cities or regions serve as major sources of migrant workers for this industry, and which cities or locations are the primary destinations where they find employment? Which are the contributing countries on all these factors and how many more years are these dynamics expected to continue (either in upswing or as-is)?</p> <p>(Probe to understand the origins and destinations of migrants, the motivations driving migration, the age and gender breakdown of migrants, and the occupational patterns within the internal migrant population)</p>

5.	<p>EMERGING TRENDS</p> <p>What are some of the emerging trends (for next 5 years) in the tourism and hospitality sector? Which aspects of technological advancement (such as digital transformation, evolving guest preferences, online bookings, virtual tours, AI support etc.) will impact the tourism and hospitality sector? How is the department embracing digital transformation to enhance the competitiveness of the state in attracting tourists and visitors?</p> <p>How does technological advancements affect technical and vocational education domain within tourism and hospitality? How ready are the educational institutions, VTIs and training service providers to adapt their curriculums according to the changing demands of industry due to technological adoption in tourism and hospitality? What technology-related skill development and training opportunities are being promoted to equip individuals with digital skills (technology) required in this evolving sector? Which industries/sectors are early adopters of 4IR, emerging technologies, etc.? What is their impact on the skill requirements from labour force/youth?</p> <p>(Probe to understand the policies and interventions present in the country to support the school pass outs or dropouts to be job ready, willingness for institutions to adapt, internships/ apprenticeships/ work-based skilling, changes in curriculum for better industry engagement, the emerging and redundant job roles in next 5 years due to the changes mentioned in tourism and hospitality sector, how to ensure job security)</p>
6.	<p>SKILLING REQUIREMENTS</p> <p>In your opinion, are the skilling requirements (including skill mismatch) of workers witnessing a change? What is the probable reason for the change and how is it affecting the supply and demand of skills across workers and employers? How does the technological advancement impact labour market dynamics in terms of requirement of skilled workforce? Does the changing labour market dynamics disproportionately affect workers in the informal sector and/or gig workers? Are there any particular areas or job roles within the tourism and hospitality industry where skill shortages are pronounced? How have these skill gaps impacted the labour market i.e., job losses, difficult to attain employment, need to upskill?</p> <p>(Probe about the readiness of workforce with futuristic skills, skill gap in the workforce, upskilling and reskilling requirements, adoption/ transitional challenges among the MSMEs, specific sectors, etc. skill shortage and in which specific subsector, any specific geographical location, unavailability of skilled labour, informal labour, challenges faced by government and if they can provide any examples or specific areas)</p>
7.	<p>In your assessment, what is the current state of Industrial Training Institutes (ITIs) and Vocational Training Institutes (VTIs) in the country, particularly those that offer courses related to tourism and hospitality? Are these institutions receiving sufficient funding to maintain the quality of their curriculum and faculty? How can these establishments enhance the quality of their educational programs and teaching staff to bolster student employability? Furthermore, how are these institutes being prepared to adapt to a future marked by technological advances, shifting work dynamics, and evolving skill requirements?</p>
8.	<p>Are there any policies to ensure skilling of vulnerable groups including migrant workers, women, and youth in the tourism and hospitality industry? What sort of initiatives are undertaken by the Government to ensure adequate skilling opportunities are provided to the vulnerable groups? How regularly are these policies upgraded?</p>
9.	<p>COLLABORATIONS</p> <p>How does the government collaborate with industry associations, businesses, and educational institutes to bridge the skill gaps in the tourism and hospitality sector? Do they engage in any opportunity which provides incentives for private businesses to upskill/reskill their students/employees? Do they provide any funds or financial incentives to educational institutions (including vocational education providers) to conduct any trainings for any technical or futuristic skills such as soft skills, digital skills etc.? What sort of initiatives are currently in place to address the skill mismatch, improve student employability and reduce youth unemployment?</p> <p>(Probe to gather information on government partnerships with educational institutions and businesses in the tourism and hospitality sector; the nature and extent of collaboration and any budgetary support involved)</p>

10.	<p>ALIGNMENT WITH INDUSTRY NEEDS</p> <p>How does your department ensure that the content and structure of the content and structure of courses in educational institutions and certification programs in training service providers align with current and future needs of tourism and hospitality sector? Could you explain in detail the mechanism or processes your department engage in actively to collect and integrate the feedback and insights from the industry partners, industry association and other government departments (such as labour department etc.) to continually refine and enhance the courses/programs?</p>
11.	<p>FUTURE PLANS</p> <p>How does the government plan to support the educational institutions, VTIs and training providers to equip them with adequate resources (additional personnel, infrastructure or digital training tools etc.) needed for them to transition or modify their curriculum according to industry demands (requirement of higher order skills)? What are the upskilling and reskilling plan to cater the rising demand of skilled workforce, as well as workforce to be equipped with new skills due to technological advancement? How does the government foresee protecting workers who may be potentially affected by technological disruption? What safeguard measures are being planned/ proposed? If not proposed until now, is there a plan to introduce specific safeguard measures in the near future?</p> <p>(Probe to understand if there is any new/revised plan of action for higher educational institutions/TVETs/skill development institutes to promote new required skills due to technological advancements, to change pedagogical methods to support for technological advancements; understand what form of assistance is available for workers who are vulnerable to job losses due to automation to gain the advantage of taking on new/ alternate employment opportunities; how will the job be secured for those who are undergoing upskilling or reskilling to upgrade their skills?</p>

Ministry of Labour and Employment

Tourism and Hospitality Skill Council (THSC) has engaged PricewaterhouseCoopers Services LLP to conduct a nation-wide skill gap study for the Tourism and Hospitality sector. This study, as a part of the engagement, seeks to collect up-to-date and reliable data concerning the skill needs of the workforce and the skill offerings by employers within the tourism sector. It also aims to address gaps specific to the tourism industry, gain insights into industry-specific details, operational procedures, and hiring practices, and explore future aspirations and outlook. Furthermore, the study will assess the industry's willingness to participate in skills training programs, examine migration patterns, and gauge preferences for skill training. To achieve this goal, we plan to conduct in-depth interviews with government departments. This will enable us to gain valuable insights and a holistic understanding of the industry's perspective in the tourism and hospitality sector.

Please remain assured that the responses captured under this study, will not be represented individually, and all the responses will remain confidential.

Purpose of the interview:

- To understand the
 - Skill development needs within tourism and hospitality.
 - Government policies and regulations for skilling and training of workforce
- To identify
 - Skill gaps within the sector's workforce
 - In-demand job roles and their future outlook
 - The influence of technological advancements on job roles within the sector
 - Necessary adaptations in the skill development ecosystem to align with industry's needs.

Time: 30 minutes

General guidance for conducting the interview:

The purpose of the interview needs to be shared with the interviewee through email communication.

Note: The information provided by the respondent shall only be used for Skill Gap Study and shall be kept highly confidential.

Question	Answer
Name of respondents	
Contact details of the respondent	
Email ID of the respondent	
Designation of the respondent	
Name of the Interviewer	

LABOUR DEPARTMENT

Question Number	Question
1.	<p>INTRODUCTION</p> <p>What is the labour market situation in our country? How has the labour market situation changed since COVID-19? What are your department's key roles and responsibilities for development of the overall labour market and for tourism and hospitality sector, in particular? What role do labour market institutions (i.e. public and private; academic and research; job-portals and employment exchanges) play in shaping the labour market policy directions?</p> <p>(Probe to understand the employment opportunities in the tourism and hospitality sector, availability of skilled workforce, youth unemployment, general labour demand and supply scenario, formal and informal labour market, participation of women in the tourism and hospitality sector, share of migrant workers, participation of gig workers in the labour market etc.)</p>
2.	<p>POLICY FRAMEWORK</p> <p>What were the labour market reforms undertaken in last 5 years on national level and if any, on state level? What are the national government policies and regulations related to skill development and workforce training and for tourism and hospitality sector, in particular? Are there any government initiatives to support employment related developments in sub-sectors of tourism and hospitality sector? What are the key policies to support the unemployed workforce, informal and job seekers in the tourism and hospitality sector? What changes in policy reforms is the government or the department anticipating in the next 5 years?</p> <p>(Probe to understand the labour reforms, impact they have created, challenges faced in implementation, ALMPs, cooperation with education and training providers, etc.)</p>
3.	<p>BUDGET ALLOCATION</p> <p>How much funding is allocated by the Government of India and state governments for upskilling and reskilling the workforce? Have there been any recent budgetary reforms in this context, and what are the allocation channels for these funds? Can you provide insights into the government's future plans and strategies concerning the upskilling of workers? Are there any future budgetary plans to improve the status of ITI and VTI operating within the country, especially those encompassing tourism and hospitality related courses?</p>

	<p>(Explore the budgetary aspects related to skill development within the tourism and hospitality sector. Inquire about government-sponsored training and skilling campaigns, as well as any workshops aimed at skill enhancement, how the budget is allocated to various stakeholders, including educational institutes, training service providers, and businesses in this sector)</p>
4.	<p>MIGRATION DYNAMICS</p> <p>Could you provide insights into the internal migration patterns within the country, particularly as they relate to the tourism and hospitality sector? Which specific cities or regions serve as major sources of migrant workers for this industry, and which cities or locations are the primary destinations where they find employment? Which are the contributing countries on all these factors and how many more years are these dynamics expected to continue (either in upswing or as-is)?</p> <p>(Probe to understand the origins and destinations of migrants, the motivations driving migration, the age and gender breakdown of migrants, and the occupational patterns within the internal migrant population)</p>
5.	<p>EMERGING TRENDS</p> <p>How does technological advancements affect labour market in your country and within tourism and hospitality? How ready are the tourism and hospitality industries for technological adoption? Which industries/sectors are early adopters of 4IR, emerging technologies, etc.? What is their impact on the labour force/ employment profile of youth?</p> <p>(Probe to understand the policies and interventions present in the country to support the school pass outs or dropouts to be job ready, industry-engagement, internships/ apprenticeships/ work-based skilling, changes in curriculum for better industry engagement, the emerging and redundant job roles in next 5 years due to the changes mentioned in tourism and hospitality sector, how to ensure job security)</p>
6.	<p>SKILLING REQUIREMENTS</p> <p>In your opinion, are the skilling requirements (including skill mismatch) of workers witnessing a change? What is the probable reason for the change and how is it affecting the supply and demand of skills across workers and employers? How does the technological advancement impact labour market dynamics in terms of requirement of skilled workforce? Does the changing labour market dynamics disproportionately affect workers in the informal sector and/or gig workers? Are there any particular areas or job roles within the tourism and hospitality industry where skill shortages are pronounced? How have these skill gaps impacted the labour market i.e., job losses, difficult to attain employment, need to upskill?</p> <p>(Probe about the readiness of workforce with futuristic skills, skill gap in the workforce, upskilling and reskilling requirements, adoption/ transitional challenges among the MSMEs, specific sectors, etc. skill shortage and in which specific subsector, any specific geographical location, unavailability of skilled labour, informal labour, challenges faced by government and if they can provide any examples or specific areas)</p>
7.	<p>In your assessment, what is the current state of Industrial Training Institutes (ITIs) and Vocational Training Institutes (VTIs) in the country, particularly those that offer courses related to tourism and hospitality? Are these institutions receiving sufficient funding to maintain the quality of their curriculum and faculty? How can these establishments enhance the quality of their educational programs and teaching staff to bolster student employability? Furthermore, how are these institutes being prepared to adapt to a future marked by technological advances, shifting work dynamics, and evolving skill requirements?</p>

8.	Are there any policies to ensure skilling of vulnerable groups including migrant workers, women, and youth especially in the tourism and hospitality industry? What sort of initiatives are undertaken by the Government to ensure adequate skilling opportunities are provided to the vulnerable groups? How regularly are these policies upgraded?
9.	<p>COLLABORATIONS</p> <p>How does the government collaborate with industry associations, businesses and educational institutes to bridge the skill gaps in the tourism and hospitality sector? Do they engage in any opportunity which provides incentives for private businesses to upskill/reskill their students/employees? Do they provide any funds or financial incentives to educational institutions (including vocational education providers) to conduct any trainings for any technical or futuristic skills such as soft skills, digital skills etc.? What sort of initiatives are currently in place to address the skill mismatch, improve student employability and reduce youth unemployment?</p> <p>(Probe to gather information on government partnerships with educational institutions and businesses in the tourism and hospitality sector; the nature and extent of collaboration and any budgetary support involved)</p>
10.	<p>FUTURE PLANS</p> <p>How does the government plan to support the workers to transition to jobs requiring higher order skills? What are the upskilling and reskilling plan to cater the rising demand of skilled workforce, as well as workforce equipped with new skills required due to technological advancement? How does the government foresee protecting workers who may be potentially affected by technological disruption? What safeguard measures are being planned/ proposed? If not proposed until now, is there a plan to introduce specific safeguard measures in the near future?</p> <p>(Probe to understand if there is any new/revised plan of action for higher educational institutions/TVETs/skill development institutes to promote new required skills due to technological advancements, to change pedagogical methods to support for technological advancements; understand what form of assistance is available for workers who are vulnerable to job losses due to automation to gain the advantage of taking on new/ alternate employment opportunities; how will the job be secured for those who are undergoing upskilling or reskilling to upgrade their skills)</p>

Ministry of Skill Development and Technical Education

Note: Every state has a slightly different name for the department in their state Government. We will interview the department which focuses on skill development, technical education, vocational education, and training.

Tourism and Hospitality Skill Council (THSC) has engaged Price Waterhouse Coopers Pvt. Ltd. to conduct a nation-wide skill gap study for the Tourism and Hospitality sector. This study, as a part of the engagement, seeks to collect up-to-date and reliable data concerning the skill needs of the workforce and the skill offerings by employers within the tourism and hospitality sector. It also aims to address gaps specific to the tourism and hospitality industry, gain insights into industry-specific details, operational procedures, and hiring practices, and explore future aspirations and outlook. Furthermore, the study will assess the industry's willingness to participate in skills training programs, examine migration patterns, and gauge preferences for skill training. To achieve this goal, we plan to conduct in-depth interviews with government departments. This will enable us to gain valuable insights and a holistic understanding of the industry's perspective in the tourism and hospitality sector.

Please remain assured that the responses captured under this study, will not be represented individually, and all the responses will remain confidential.

Purpose of the interview:

- To understand the
 - Skill development needs within tourism and hospitality.

- Technical and vocational education infrastructure
 - Government policies and regulations for skilling and training of workforce
- To identify
 - Skill gaps within the sector's workforce
 - In-demand job roles and their future outlook
 - The influence of technological advancements on job roles within the sector
 - Necessary adaptations in the skill development ecosystem to align with industry's needs.

Time: 30 minutes

General guidance for conducting the interview:

The purpose of the interview needs to be shared with the interviewee through email communication.

Note: The information provided by the respondent shall only be used for Skill Gap Study and shall be kept highly confidential.

Question	Answer
Name of respondents	
Contact details of the respondent	
Email ID of the respondent	
Designation of the respondent	
Name of the Interviewer	

Question Number	Question
1.	<p>INTRODUCTION</p> <p>What is the vocational and technical education situation in our country? How has the educational institutions evolved to meet the changing the need of our economy? What is your department's key roles and responsibilities for development of the technical and vocational education and for tourism and hospitality sector, in particular? What role do vocational and technical education system (i.e., public, and private universities, colleges, ITIs, polytechnics, training service providers and other institutions who grants diploma/certifications) play in shaping the skills of labour workforce?</p> <p>(Probe to understand the educational institutions (technical and vocational education) in the tourism and hospitality sector, primary objectives regarding skill development, public and private channels of technical and vocational training esp. in tourism and hospitality sector etc.)</p>
2.	<p>POLICY FRAMEWORK</p> <p>What were the technical and vocational education reforms undertaken in last 5 years on national level and if any, on state level? What are the national government policies and regulations related to skill development and workforce training and for tourism and hospitality sector, in particular? Are there any government initiatives to support skill developments in sub-sectors of tourism and hospitality sector? What are the key policies to support the graduates/pass outs from these educational institutions? What changes in policy reforms is the government or the department anticipating in the next 5 years?</p>

	(Probe to understand the educational reforms, impact they have created, challenges faced in implementation, National Policy on vocational education and training, cooperation with industry partners and other relevant labour market stakeholders)
3.	<p>BUDGET ALLOCATION</p> <p>How much funding is allocated by the Government of India and state governments for upskilling and reskilling the workforce? Have there been any recent budgetary reforms in this context, and what are the allocation channels for these funds? Can you provide insights into the government's future plans and strategies concerning the upskilling of workers? Are there any future budgetary plans to improve the status of ITI and VTI operating within the country, especially those encompassing tourism and hospitality related courses?</p> <p>(Explore the budgetary aspects related to skill development within the tourism and hospitality sector. Inquire about government-sponsored training and skilling campaigns, as well as any workshops aimed at skill enhancement, how the budget is allocated to various stakeholders, including educational institutes, training service providers, and businesses in this sector)</p>
4.	<p>MIGRATION DYNAMICS</p> <p>Could you provide insights into the internal migration patterns within the country, particularly as they relate to the tourism and hospitality sector? Which specific cities or regions serve as major sources of migrant workers for this industry, and which cities or locations are the primary destinations where they find employment? Which are the contributing countries on all these factors and how many more years are these dynamics expected to continue (either in upswing or as-is)?</p> <p>(Probe to understand the origins and destinations of migrants, the motivations driving migration, the age and gender breakdown of migrants, and the occupational patterns within the internal migrant population)</p>
5.	<p>EMERGING TRENDS</p> <p>What are some of the emerging trends (for next 5 years) in the tourism and hospitality sector? How does technological advancements affect technical and vocational education domain within tourism and hospitality? Which aspects of technological advancement (such as digital transformation, evolving guest preferences, online bookings, virtual tours, AI support etc.) will impact the tourism and hospitality sector? How ready are the educational institutions, VTIs and training service providers to adapt their curriculums according to the changing demands of industry due to technological adoption esp. in tourism and hospitality? Which industries/sectors are early adopters of 4IR, emerging technologies, etc.? What is their impact on the skill requirements from labour force/youth?</p> <p>(Probe to understand the policies and interventions present in the country to support the school pass outs or dropouts to be job ready, willingness for institutions to adapt, internships/ apprenticeships/ work-based skilling, changes in curriculum for better industry engagement, the emerging and redundant job roles in next 5 years due to the changes mentioned in tourism and hospitality sector, how to ensure job security)</p>
6.	<p>SKILLING REQUIREMENTS</p> <p>In your opinion, are the skilling requirements (including skill mismatch) of workers witnessing a change? What is the probable reason for the change and how is it affecting the supply and demand of skills across workers and employers? How does the technological advancement impact labour market dynamics in terms of requirement of skilled workforce? Does the changing labour market dynamics disproportionately affect workers in the informal sector and/or gig workers? Are there any particular areas or job roles within the tourism and hospitality industry where skill shortages are pronounced? How have these skill gaps impacted the labour market i.e., job losses, difficult to attain employment, need to upskill?</p>

	(Probe about the readiness of workforce with futuristic skills, skill gap in the workforce, upskilling and reskilling requirements, adoption/ transitional challenges among the MSMEs, specific sectors, etc. skill shortage and in which specific subsector, any specific geographical location, unavailability of skilled labour, informal labour, challenges faced by government and if they can provide any examples or specific areas)
7.	In your assessment, what is the current state of Industrial Training Institutes (ITIs) and Vocational Training Institutes (VTIs) in the country, particularly those that offer courses related to tourism and hospitality? Are these institutions receiving sufficient funding to maintain the quality of their curriculum and faculty? How can these establishments enhance the quality of their educational programs and teaching staff to bolster student employability? Furthermore, how are these institutes being prepared to adapt to a future marked by technological advances, shifting work dynamics, and evolving skill requirements?
8.	Are there any policies to ensure skilling of vulnerable groups including migrant workers, women, and youth especially in the tourism and hospitality industry? What sort of initiatives are undertaken by the Government to ensure adequate skilling opportunities are provided to the vulnerable groups? How regularly are these policies upgraded?
9.	COLLABORATIONS How does the government collaborate with industry associations, businesses, and educational institutes to bridge the skill gaps in the tourism and hospitality sector? Do they engage in any opportunity which provides incentives for private businesses to upskill/reskill their students/employees? Do they provide any funds or financial incentives to educational institutions (including vocational education providers) to conduct any trainings for any technical or futuristic skills such as soft skills, digital skills etc.? What sort of initiatives are currently in place to address the skill mismatch, improve student employability and reduce youth unemployment? (Probe to gather information on government partnerships with educational institutions and businesses in the tourism and hospitality sector; the nature and extent of collaboration and any budgetary support involved)
10.	ALIGNMENT WITH INDUSTRY NEEDS How does your department ensure that the content and structure of the content and structure of courses in educational institutions and certification programs in training service providers align with current and future needs of tourism and hospitality sector? Could you explain in detail the mechanism or processes your department engage in actively to collect and integrate the feedback and insights from the industry partners, industry association and other government departments (such as labour department etc.) to continually refine and enhance the courses/programs?
11.	FUTURE PLANS How does the government plan to support the educational institutions, VTIs and training providers to equip them with adequate resources (additional personnel, infrastructure or digital training tools etc.) needed for them to transition or modify their curriculum according to industry demands (requirement of higher order skills)? What are the upskilling and reskilling plan to cater the rising demand of skilled workforce, as well as workforce to be equipped with new skills due to technological advancement? How does the government foresee protecting workers who may be potentially affected by technological disruption? What safeguard measures are being planned/ proposed? If not proposed until now, is there a plan to introduce specific safeguard measures in the near future? (Probe to understand if there is any new/revised plan of action for higher educational institutions/TVETs/skill development institutes to promote new required skills due to technological

advancements, to change pedagogical methods to support for technological advancements; understand what form of assistance is available for workers who are vulnerable to job losses due to automation to gain the advantage of taking on new/ alternate employment opportunities; how will the job be secured for those who are undergoing upskilling or reskilling to upgrade their skills)
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Industry Associations

Tourism and Hospitality Skill Council (THSC) has engaged PricewaterhouseCoopers Services LLP to conduct a nation-wide skill gap study for the Tourism and Hospitality sector. This study, as a part of the engagement, seeks to collect up-to-date and reliable data concerning the skill needs of the workforce and the skill offerings by employers within the tourism sector. It also aims to address gaps specific to the tourism industry, gain insights into industry-specific details, operational procedures, and hiring practices, and explore future aspirations and outlook. Furthermore, the study will assess the industry's willingness to participate in skills training programs, examine migration patterns, and gauge preferences for skill training. To achieve this goal, we plan to conduct comprehensive interviews with industry associations within the tourism and hospitality sub-sector. This will enable us to gain valuable insights and a holistic understanding of the industry's perspective in the tourism and hospitality sector.

General guidance for conducting the interview:

- The purpose of the interview needs to be shared with the interviewee through email communication.

Note: The information provided by the respondent shall only be used for Skill Gap Study and shall be kept highly confidential

Key Respondent: The respondents should be senior level officials/member from the industry association.

Time: 25-30 minutes per interview (depending on the time availability of the respondent)

Team: 1 interviewer

A. General information on the respondent and association

Question Number	Question	Answers
1.	Name of the respondent	
2.	Contact number of the respondent	
3.	Email ID of the respondent	
4.	Name of industry association	
5.	Name of the sub-sector industry association works in (Hotels, Food services, facility management, etc.)	
6.	Name of the state industry association works in	
7.	Name of the district industry association works in	
8.	Full address of the industry association	
9.	Number of member industries/firms	

Question Number	Question
10.	<p>INTRODUCTION</p> <p>Could you please provide a concise overview of your industry association's role in the tourism and hospitality sector, including the subsectors (say, hotel, travel agents, food services – restaurants etc.) it encompasses and the major industries it represents. Also, provide a summary of the association's key activities?</p>
11.	<p>SECTORAL OVERVIEW</p> <p>What is the short-term (5 years) and long-term (10 years) outlook of the tourism and hospitality sector and the sub-sector (that is focused by the industry association) in terms of industry growth and labour demand? What changes has the COVID-19 pandemic brought to the tourism and hospitality sector, in terms of growth, labour market including employment and skilling requirements?</p> <p>(Probe to understand how the future of the tourism and hospitality and how the subsector would change in terms of sectoral growth; job roles that will be in most demand and that will be redefined/ created within the sector due to technology etc. emergence of gig economy; the possibility of job losses (including for informal and gig workers) owing to technology)</p>
12.	<p>TECHNOLOGICAL IMPACT</p> <p>What are the new/ advanced technologies that are going to (or are already) impact(ing) the industries operating in the tourism and hospitality sector (relevant to your association's/ institution's focus)? How ready are the member entities/ industries in your association to introduce these new/ advanced technologies? How would you rate adoption of technology in your sub-sectors (relevant to your association's/ institution's focus)? What major technological advancements (in the wake of digitalization, automation, etc.) have been adopted by the industries in the sub-sector (relevant to your association's/ institution's focus)?</p>
13.	<p>SKILLING REQUIREMENTS</p> <p>When recruiting workers, which specific skills are considered as most important and relevant for workers? Have these skilling requirements witnessed a change in the last 5 years? Do your member industries experience any challenge in finding skilled workers?</p> <p>Are there any particular areas or job roles within the subsector (relevant to your association's/ institution's focus) where skill shortages are more pronounced? Which job roles are most hard to fill in especially at the entry level? How have these skill gaps impacted the performance, competitiveness, and growth of businesses within the subsector (relevant to your association's/ institution's focus)?</p> <p>(Probe to understand the skill shortage and skill gaps i.e., are there unavailability of labour i.e. skilled or unskilled both are unavailable, or are there unavailability of skilled labour i.e. there is availability of unskilled labour but not skilled or are there unavailability of skilled labour with specific skills such as soft skills, digital literacy etc.)</p>
14.	<p>Do the industries recognize the changing nature of work and the need for futuristic skills set? How ready are your member industries to introduce such changes? To what extent do they realize the need to prepare their existing workforce for future of work (mostly among large</p>

	<p>employers, MSME etc.?) What changes in labour markets (i.e. employment and skilling) do your member industries anticipate in the wake of technological advancement?</p> <p>(Probe to understand the specific skills and qualifications sought by employers, such as whether they prefer candidates from government or private institutes, ITIs, colleges/universities, or specific certification courses. Additionally, if possible, can they provide this information job role-wise? Have there been any noticeable trends or shifts in the skills and competencies demanded within the subsector relevant to your industry association?)</p>
15.	<p>INDUSTRY INITIATIVES</p> <p>Is the industry cognizant of the importance of enhancing the skills of their current workforce? What strategies do they have in place for upskilling or re-skilling existing employees? If they are currently conducting training programs, what specific skills are covered in these training initiatives? Additionally, are these training programs typically conducted in-house? What kind of changes and challenges do the member industries anticipate in re-skilling/ upskilling their employees and what are the steps taken (if any) by them to mitigate the skilling challenges?</p> <p>(Probe to understand the industry's outlook for skills importance, and the steps taken so far by industry)</p>
16.	<p>Given the anticipated greater needs for skill development for workers, do your member industries or any representative of your institution participated/ participating in curriculum designing at educational institutions? Do the educational/ skilling institutions offer training in market relevant trades (that are of high demand); or enable trainees/ students with relevant industrial exposure through internship and/ or apprenticeship?</p> <p>(Probe to understand the readiness (and proactiveness) of industries in engaging with higher education/ training/ skilling institutions in terms of curriculum design for futuristic courses (short-term and long-term) for both private and government.</p>
17.	<p>What are your member industries' views on from the labour force being prepared by higher education institutes, TVET institutions and short-term skill development courses? Please answer the following for each type of institute:</p> <ol style="list-style-type: none"> 1. How job-ready/ employable (in terms of skills and knowledge) is the labour force coming from the institution? 2. Do they need extensive training for their skill upgradation? What kind of training do they require the most? <p>What kind of skills do they usually have, and what are the key employability skills they lack the most?</p>
18.	<p>PARTNERSHIPS AND COLLABORATIONS</p> <p>Does your relevant subsector engage in collaborative efforts with educational institutions, training service providers, or government bodies to address skill gaps among workers? Are there initiatives aimed at providing industry-focused training, such as programs that encompass recruitment, training, and deployment? Additionally, do they offer on-the-job training, internships, or pre-placement opportunities to students from educational institutes?</p> <p>(Probe to understand any partnerships with educational institutes or govt bodies where the hotel industry specifies their skill requirements, and they create industry focused courses or certifications such as RTD)</p>

Educational Institutions

Tourism and Hospitality Skill Council (THSC) has engaged PricewaterhouseCoopers Services LLP to conduct a nation-wide skill gap study for the Tourism and Hospitality sector. This study, as a part of the engagement, seeks to collect up-to-date and reliable data concerning the skill needs of the workforce and the skill offerings by employers within the tourism sector. It also aims to address gaps specific to the tourism industry, gain insights into industry-specific details, operational procedures, and hiring practices, and explore future aspirations and outlook. Furthermore, the study will assess the industry's willingness to participate in skills training programs, examine migration patterns, and gauge preferences for skill training. To achieve this goal, we are conducting in-depth interviews with educational institutions across India. This will enable us to gain valuable insights and a holistic understanding of the educational institution's perspective in the tourism and hospitality sector.

Purpose of the interview:

- To understand the courses offered and industry relevant curriculum.
- To understand the employability of students' graduating from the institutes
- To identify the job roles in demand at present and in future
- To understand the readiness of educational institutions in view of technological change

Time: 30 minutes

General guidance for conducting the interview:

The purpose of the interview needs to be shared with the interviewee through email communication.

Note: The information provided by the respondent shall only be used for Skill Gap Study and shall be kept highly confidential.

This document details the tool for conducting interview with principal or any senior faculty member in the survey catchment area. The respondents should be senior level officials from these educational institutes. The different types of institutes to be covered include:

- Polytechnic Colleges
- ITIs
- Hotel Management Colleges
- Colleges providing vocational courses.
- Colleges providing bachelors/ post-graduate programmes in tourism and hospitality sector.

This questionnaire is designed to gather information about the infrastructure of educational institutes available, the trades offered, profile of students etc. Key Respondent: Officials from the institutes listed above.

Questions	Answers
1. Name of Respondent	
2. Name of the Institute/College	
3. State and District of the Educational Institution	
4. Designation of the respondent	
5. Number of years of experience as Principal/Teacher faculty	
6. Name of courses offered in the Institute	
7. No. of Faculty/Teaching Staff in the institute	

S.No	Questions
8.	<p>COURSES</p> <p>What are the key courses and programs offered by your educational institute related to tourism and hospitality? Among the courses mentioned, how many are diploma/certification courses, graduate, and master's courses?</p> <p>(Probe to understand any type of changes in curriculum or any addition or elimination of courses, reasons of any changes in curriculum or any modifications in courses in last 5 years)</p>
9.	<p>INDUSTRY RELEVANCE</p> <p>How does your institute ensure that the curriculum is up to date and relevant to the changing needs of the tourism and hospitality industry? How do you integrate industry's suggestions and feedback to into the course development and ensure that the courses align closely to industry standards and requirements? How frequently you update the curriculum? Is there any provision of guest lectures by industry partners conducted?</p> <p>(Probe to understand any interactions or meetings conducted between the staff of educational institutions and industry partners, frequency of their meetings, any teaching staff which has past industry experience)</p>
10.	<p>DIGITAL INFRASTRUCTURE</p> <p>How does your educational institution approach digital readiness, including budget allocation for digital initiatives, the type of digital infrastructure in place, staff preparedness for using digital technologies, the extent to which the technology is teacher-friendly, integration of digital tools, data security and privacy measures, student access to digital resources, methods for assessing the impact of digital initiatives, and future plans for enhancing digital readiness?</p>
11.	<p>SOFT SKILLS AND ADAPTIVE LEARNING</p> <p>How much focus does your institute place on nurturing soft skills like communication, customer service, and problem-solving, which are pivotal in the tourism and hospitality sector? Does your institute have mechanisms in place to adjust its programs in response to evolving trends, technological advancements, and changing consumer preferences within the tourism and hospitality industry?</p> <p>(Probe to understand how they have modified the curriculum for delivery of the soft skills, or conduct separate sessions for all students across courses, do they hire separate personnel to impart such teachings)</p>
12.	<p>TEACHER TRAINING</p> <p>How often do you train your teaching staff? Do you face any challenges in training your staff on a regular basis? What type of teaching delivery methods are used such as classroom teaching, interactive sessions, smart boards etc.? Has there been any change in teaching methods over the past 5 years?</p> <p>(Probe to understand the shortage of teachers, any changes in teaching methods in last 5 years, and any course specific, refresher trainings or futuristic skills trainings provided to teachers, discuss in detail about teacher's proficiency in future relevant skills such as digital skills, life skills, entrepreneurship skills etc.)</p>

13.	<p>SKILLING OF STUDENTS</p> <p>How do you assess and measure the readiness and skills of students upon completion of their courses, and how do you use this information to enhance the delivery of your educational programs? Could you provide details on the specific assessment methods, feedback mechanisms from students and employers, and any instances where this feedback has led to improvements in your teaching delivery and curriculum? Additionally, do you have systems in place to track the post-graduation success of your students and how is the data utilized for ongoing improvement in teaching methods?</p>
14.	<p>INDUSTRY PARTNERSHIPS</p> <p>Can you describe any collaborations or partnerships with hotels, travel agencies, food services unit, hospitality industry, cruise liners or any industry associations in tourism and hospitality sector that has enhanced the educational institutions delivery of curriculum? Do you partner with employers for internships, on the job trainings or for Recruit Train Deploy?</p> <p>RTD is an opportunity where industry can engage in developing the skills of youth as per the industry/employer's requirements.</p> <p>(Probe to understand the current partnerships and if they are interested to increase their industry exposure and would like to partner with industry partners, ask their willingness to engage or collaborate for Recruit Train Deploy opportunities, internships etc.)</p>
15.	<p>PLACEMENT SCENARIO</p> <p>How does your institute support students in finding employment in tourism and hospitality sector? Does your institute provide preplacement support such as mock interviews, resume building or group discussions? What type (i.e., subsector say hotel, travel agents, food services, hospitality etc.) of companies visit the campus for hiring students from tourism and hospitality courses? What is the job placement rate for your students? What has been the trend of placement from past 5 years? Do companies prefer students from any specific educational qualification or any specific skills/certifications/experience?</p> <p>(Probe to understand the overall placement scenario, challenges faced by institute to place students, reasons of low placements (if, any), number of companies visit the campus, way to approach the companies, MOUs signed with any companies)</p>
16.	<p>EMERGING TRENDS</p> <p>Can you share the insights into how your institute is preparing students for emerging trends in the tourism and hospitality sector due to technology advancements etc.? What are the emerging job roles in tourism and hospitality sector? Which job will be redundant or will require redefine? What are the futuristic skills preferred by industry? How it will impact the work dynamics such as hybrid work, flexible hours etc.?</p>
17.	<p>CHALLENGES AND OPPORTUNITIES</p> <p>What specific challenges and opportunities does your institution encounter when it comes to skilling students and teachers, and what strategies is your institution currently implementing to tackle these issues? Additionally, looking ahead, what changes in skilling requirements do you anticipate in the coming 5 years, and how do you plan to address these changes to ensure that both students and teachers remain well-prepared?</p>

Training Service Providers

Tourism and Hospitality Skill Council (THSC) has engaged PricewaterhouseCoopers Services LLP to conduct a nation-wide skill gap study for the Tourism and Hospitality sector. This study, as a part of the engagement, seeks to collect up-to-date and reliable data concerning the skill needs of the workforce and the skill offerings by employers

within the tourism sector. It also aims to address gaps specific to the tourism industry, gain insights into industry-specific details, operational procedures, and hiring practices, and explore future aspirations and outlook. Furthermore, the study will assess the industry's willingness to participate in skills training programs, examine migration patterns, and gauge preferences for skill training. To achieve this goal, we are conducting in-depth interviews with training service providers across India. This will enable us to gain valuable insights and a holistic understanding of the educational opportunities available in the tourism and hospitality sector.

Purpose of the interview:

- To understand the courses offered and industry relevant curriculum.
- To understand the employability of students' graduating from these training service providers
- To identify the job roles in demand at present and in future
- To understand the readiness of these training service providers in view of technological change

Time: 30 minutes

General guidance for conducting the interview:

The purpose of the interview needs to be shared with the interviewee through email communication.

Note: The information provided by the respondent shall only be used for Skill Gap Study and shall be kept highly confidential.

This document details the tool for conducting interview with any senior faculty member in the survey catchment area. The respondents should be senior level faculty from these training service providers. This questionnaire is designed to gather information about the infrastructure of training service providers available, the trades offered, profile of students etc.

Key Respondent: Senior faculty from the institutes listed above.

Questions	Answers
1. Name of Respondent	
2. Name of the Institute/College	
3. State and District of the Educational Institution	
4. Designation of the respondent	
5. Number of years of experience as Teacher faculty	
6. Number and Name of courses offered in the Institute	
7. No. of Faculty/Teaching Staff in the institute	

Note: Institute here refers to the training service providers

S.No	Questions
8.	<p>INTRODUCTION and COURSES</p> <p>What is the ownership status of the Training service provider i.e., Govt or Private? Is your training service provider is affiliated to any corporation or scheme such as NSDC (National Skill Development Council), NCVT (National Council of Vocational training) etc.? What are the key courses and programs offered by your institute related to tourism and hospitality? Among the courses mentioned, how many are diploma and certification courses? What is the duration of these courses? Which of the courses have the high enrolment rate in past 3 years? Why are such courses generally preferred by students?</p>

	(Probe to understand any type of changes in curriculum or any addition or elimination of courses, reasons of any changes in curriculum or any modifications in courses in last 5 years, reason of students of course preference)
9.	<p>INDUSTRY RELEVANCE</p> <p>How does your institute ensure that the modules of the program/course is up to date and relevant to the changing needs of the tourism and hospitality industry? How do you integrate industry's suggestions and feedback to into the course development and ensure that the courses align closely to industry standards and requirements? How frequently you update the course? Can you describe if your institute collects feedback from industry professionals to enhance the curriculum and continually improve the curriculum to bridge any skill gaps?</p> <p>(Probe to understand any interactions or meetings conducted between the staff of training service providers and industry partners, frequency of their meetings, any teaching staff which has past industry experience)</p>
10.	<p>DIGITAL INFRASTRUCTURE</p> <p>How does your institution approach digital readiness, including budget allocation for digital initiatives, the type of digital infrastructure in place, staff preparedness for using digital technologies, the extent to which the technology is teacher-friendly, integration of digital tools, data security and privacy measures, student access to digital resources, methods for assessing the impact of digital initiatives, and future plans for enhancing digital readiness?</p>
11.	<p>SOFT SKILLS AND ADAPTIVE LEARNING</p> <p>How much focus does your institute place on nurturing soft skills like communication, customer service, and problem-solving, which are pivotal in the tourism and hospitality sector? Does your institute have mechanisms in place to adjust its programs in response to evolving trends, technological advancements, and changing consumer preferences within the tourism and hospitality industry?</p> <p>(Probe to understand how they have modified the curriculum for delivery of the soft skills, or conduct separate sessions for all students across courses, do they hire separate personnel to impart such teachings)</p>
12.	<p>SKILLING OF STUDENTS</p> <p>How do you assess and measure the readiness and skills of students upon completion of their courses, and how do you use this information to enhance the delivery of your programs? Could you provide details on the specific assessment methods, feedback mechanisms from students, and any instances where this feedback has led to improvements in your teaching delivery and curriculum? Additionally, do you have systems in place to track the success of your students and how is the data utilized for ongoing improvement in teaching methods?</p>
13.	<p>INDUSTRY PARTNERSHIPS</p> <p>Can you describe any collaborations or partnerships with hotels, travel agencies, food services unit, hospitality industry, cruise liners or any industry associations in tourism and hospitality sector that has enhanced the institutions delivery of curriculum? Do you partner with employers for internships, on the job trainings or for Recruit Train Deploy?</p> <p>RTD is an opportunity where industry can engage in developing the skills of youth as per the industry/employer's requirements.</p>

	(Probe to understand the current partnerships and if they are interested to increase their industry exposure and would like to partner with industry partners, ask their willingness to engage or collaborate for Recruit Train Deploy opportunities, internships etc.)
14.	<p>PLACEMENT SCENARIO</p> <p>How does your institute support students in finding employment in tourism and hospitality sector? Does your institute provide preplacement support such as mock interviews, resume building or group discussions? What type (i.e., subsector say hotel, travel agents, food services, hospitality etc.) of companies visit the campus for hiring students from tourism and hospitality courses? What is the job placement rate for your students? What has been the trend of placement from past 5 years? Do companies prefer students from any specific educational qualification or any specific skills/certifications/experience? Which of the courses provided by your institute are most relevant according to industry preference? Which course has the maximum placement offers? What are the reasons of these courses to be preferred by industry partners? What is the average monthly salary of student's (QP wise)? What are the job roles for which the students were generally hired for?</p> <p>(Probe to understand the overall placement scenario, challenges faced by institute to place students, reasons of low placements (if, any), number of companies visit the campus, way to approach the companies, MOUs signed with any companies, track (mapping) the job roles with QPs)</p>
15.	<p>EMERGING TRENDS</p> <p>Can you share the insights into how your institute is preparing students for emerging trends in the tourism and hospitality sector due to technology advancements etc.? What are the emerging job roles in tourism and hospitality sector? Which job will be redundant or will require redefine? What are the futuristic skills preferred by industry? How it will impact the work dynamics such as hybrid work, flexible hours etc.?</p>
16.	<p>CHALLENGES AND OPPORTUNITIES</p> <p>What specific challenges and opportunities does your institution encounter when it comes to skilling students and teachers, and what strategies is your institution currently implementing to tackle these issues? Additionally, looking ahead, what changes in skilling requirements do you anticipate in the coming 5 years, and how do you plan to address these changes to ensure that both students and teachers remain well-prepared? Is there any support you think you need from govt.? What type of support you may need?</p> <p>(Probe to understand the challenges faced by institute such as difficulty in mobilizing students from remote locations, unwillingness of trainers as the institute is in remote location, lack of industry support for placements, general perception of the community that skill training is mostly for male students, presence of traditional industries)</p>

Quantitative Interviews

Employers

The Tourism and Hospitality Skill Council (THSC), in collaboration with PricewaterhouseCoopers Services LLP, is conducting a primary survey aiming to assess the skills needed and available in the tourism and hospitality industry across India. This study involves the participation of approximately 500 employers from the tourism and hospitality sector. We have selected your organization to be a part of the survey, and therefore, you are requested to provide details about workers in your organization, their recruitment methods, their skilling requirements, and provision of training in your organization. Your responses will be kept fully confidential and private, with only the research team being able to access your data. Participation in this survey is entirely voluntary, and you have the liberty to opt-out at

any point. This interview will take 30 minutes of your time. Thank you for considering taking part in this important study.

Please remain assured that the responses captured under this study, will not be represented individually, and all the responses will remain confidential.

Purpose of the interview:

- To understand the
 - Workforce requirements in the tourism and hospitality sector.
 - Skill development needs within tourism and hospitality.
 - Trends in migration within the tourism and hospitality sector.

- To identify
 - Skill gaps within the sector's workforce
 - In-demand job roles and their future outlook
 - The influence of technological advancements on job roles within the sector
 - Necessary adaptations in the skill development ecosystem to align with employer needs.

Time: 30 minutes

General guidance for the interviewer:

1. The purpose of the interview needs to be shared with the interviewee through email communication.

Note: The data provided by the respondent will solely be utilized for the Skill Gap Study and will be maintained with the utmost confidentiality.

Section A: This section consists of enquiries related to demographic details of the respondent.

S. No.	Description	Option	Code	Skip
1.	In which state is the respondent currently located? (Only one code) (To be filled by the enumerator)	Andhra Pradesh	1	
		Assam	2	
		Bihar	3	
		Daman and Diu	4	
		Delhi NCR	5	
		Goa	6	
		Gujarat	7	
		Himachal Pradesh	8	
		Jammu and Kashmir	9	
		Jharkhand	10	
		Karnataka	11	
		Kerala	12	
		Andaman and Nicobar	13	
		Madhya Pradesh	14	
		Maharashtra	15	
		Meghalaya	16	
		Odisha	17	
		Puducherry (Pondicherry)	18	
		Rajasthan	19	
		Sikkim	20	
		Tamil Nadu	21	
		Telangana	22	
		Uttar Pradesh	23	
		Uttarakhand	24	
		West Bengal	25	
		Ladakh	26	

S. No.	Description	Option	Code	Skip
2.	In which district is the respondent currently located? (To be filled by the enumerator) (Only one code)	List mentioned in Annexure		
3.	What is your full name? (Fill in the blanks – only alphabetic inputs allowed)	First Name _____ Last Name _____		
4.	Please provide your contact number. (10-digit number)	Mobile number _____		
5.	Please provide your Email ID:	_____@_____		
6.	What is the name of your firm? <i>(Surveyor can write it himself if he is sure, or else ask to confirm from the respondent)</i>			
7.	What is your designation within this firm? (The primary respondent shall be the human resources head or any senior employee of the firm) (Only one code)	Owner/Founder	1	
		Human Resource (HR) head or Manager	2	
		Another designation, specify _____	3	
8.	How long have you worked in this business/enterprise?	_____ years		
9.	What is the type of sub-sector the employer/the firm operates in? Hotel industry Provides accommodation, meals and other services for tourists and travelers. Food Services industry includes all businesses, institutions and companies which prepare meals outside the home (excluding home chefs etc.) Includes restaurants, cafes etc. Facility management refers to hospitality services at airports, malls, etc.	Hotels	1	Go to 10
		Food Services	2	Go to 11
		Facilities Management	3	Go to 12
		Tourism – Tour and travel	4	Go to 13
		Cruise Liners – cruise ships	5	Go to 14

S. No.	Description	Option	Code	Skip
	<p>Tourism – tour and travel refers to agencies, operators engaged in arrangement of transportation, accommodation, tours etc.</p> <p>Cruise Liners – Cruise ships that carries people on voyages for pleasure.</p> <p>(To be filled by the enumerator and to be confirmed with the respondent)</p> <p>(Only one code)</p>			
10.	<p>What is the category of the firm within the sub-sector of hotel?</p> <p>(Only one code)</p>	<p>Luxury and Star Hotel</p> <p>Budget Hotel</p> <p>Guest House</p> <p>Homestays</p> <p>Other, (specify)</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>99</p>	Go to 14
11.	<p>What is the category of the firm within the sub-sector of Food Services?</p> <p>(Only one code)</p>	<p>Restaurant chains</p> <p>Fast food and Quick service restaurant</p> <p>Independent Cafes</p> <p>Canteens and Dhaba (roadside eateries)</p> <p>Outdoor catering</p> <p>Other, (specify)</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>99</p>	Go to 14
12.	<p>What is the category of the firm within the sub-sector of Facilities Management?</p> <p>(Only one code)</p>	<p>Hospitality related services at airport</p> <p>Hospitality related services at theatres</p> <p>Hospitality related services at malls</p> <p>Hospitality related services at corporate towers</p> <p>Hospitality related services at guesthouses</p> <p>Hospitality related services at hospitals</p> <p>Other, (specify)</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>99</p>	Go to 14
13.	<p>What is the category of the firm within the sub-sector of Tourism – Tour and travel?</p> <p>(Only one code)</p>	<p>Tour operators and agent</p> <p>Tour transport</p> <p>Tour and Travel – Adventure Transport</p> <p>Other, (specify)</p>	<p>1</p> <p>2</p> <p>3</p> <p>99</p>	Go to 14
14.		Large (last year's turnover should be more than 250 crore)	1	Go to 15

S. No.	Description	Option	Code	Skip
	How would you describe the size or scale of the organization you work for or are affiliated with? (Only one code)	Medium (last year's turnover is between 50 crore and 250 crore)	2	
		Small (last year's turnover does not exceed 50 crore rupees)	3	
		Micro-Enterprise (last year's turnover does not exceed 5 crore rupees)	4	
15.	Do you have any branch other than this across India? (Only one code)	Yes	1	Go to 16
		No	2	Go to 17
16.	How many operational branches do you have across India? (Restrict 1 to 100)			

Section B: This section consists of enquiries related to the workforce working within the organization.

S. No.	Description	Option	Code	Skip
17.	Number of employees working currently in your organization. (Across all branches if you have more than one) (Please note that total employees include everyone from top management to entry-level workers. We are focusing this survey only for the workers)	Total _____(in numbers)		
18.	Number of employees working currently in your organization in this branch. (Please note that total employees include everyone from top management to entry-level workers. We are focusing this survey only for the workers)	Total _____(in numbers) Male _____(in numbers) Female _____(in numbers)		
19.	Total number/percentage of employees who are entry-level workers in this branch. Note – Entry level job is typically the one which can be performed without any prior work experience.	Total _____(in numbers) Share _____(in percentage)		

20.	Total number/percentage of managerial positions (or mid-level workers) in this branch. Note: Mid-level job is typically a supervisory/ managerial position)	Total _____(in numbers) Share _____(in percentage)		
21.	Total number/percentage of permanent employees in this branch.	Total _____(in numbers) Share _____(in percentage)		
22.	Do you hire contractual/temporary employees for your business? (Only one code)	Yes	1	Go to 23
		No	0	Go to 24
23.	Total number/percentage of contractual/temporary employees in this branch.	Total _____(in numbers) Share _____(in percentage)		
24.	Do you hire migrant workers for your organization? (Only one code)	Yes	1	Go to 25
		No	0	Go to 28
25.	What is the current number/percentage of migrant employees in your organization in this branch?	Total _____(in numbers) Share _____(in percentage)		Go to 26
26.	From which state or union territory majority of workers come from in your company? (You can choose 5 choices and rank them in order of preference migrant workers are hired in your firm usually) (At most 5 options can be selected)	Andaman and Nicobar Islands	1	
		Andhra Pradesh	2	
		Arunachal Pradesh	3	
		Assam	4	
		Bihar	5	
		Chandigarh	6	
		Chhattisgarh	7	
		Dadra and Nagar Haveli and Daman and Diu	8	
		Delhi	9	
		Goa	10	
		Gujarat	11	
		Haryana	12	
		Himachal Pradesh	13	
		Jammu and Kashmir	14	
		Jharkhand	15	
		Karnataka	16	
Kerala	17			
Ladakh	18			
Lakshadweep	19			

		Madhya Pradesh	20	
		Maharashtra	21	
		Manipur	22	
		Meghalaya	23	
		Mizoram	24	
		Nagaland	25	
		Odisha	26	
		Puducherry (Pondicherry)	27	
		Punjab	28	
		Rajasthan	29	
		Sikkim	30	
		Tamil Nadu	31	
		Telangana	32	
		Tripura	33	
		Uttar Pradesh	34	
		Uttarakhand	35	
		West Bengal	36	
27.	From which top 3 districts majority of migrant workers come from in your company? (Multiple choice question)	Insert the districts within the state selected. List of districts in Appendix		

Section C: This section consists of enquiries related to the recruitments in your organization.

S. No.	Description	Option	Code	Skip
28.	Of all the workers currently working in your firm, how many workers were recruited in FY 2022-23? (in percentage of total workers)	____ (in numbers) ____ (in percentage)		Go to 29
29.	What are the most common modes of recruitment for entry level workers? (Multiple Choice question)	Tourism and Hospitality colleges (IHM - Institute of Hotel Management, ISH- India School of Hospitality etc.)	1	
		Other Colleges/Universities which have dedicated Tourism and Hospitality course	2	
		Other Colleges/Universities which do not have Tourism and Hospitality course	3	
		ITI/Polytechnics which have dedicated Tourism and Hospitality course	4	
		ITI/Polytechnics which do not have dedicated Tourism and Hospitality course	5	
		Vocational/short term training Institute/NGOs	6	
		Employee Referrals	7	
		Newspaper/Advertisements/Pamphlets	8	
		Recruitment Agencies	9	
		Online Portals (Naukri.com/ indeed.com/linkedin.com etc.)	10	
		Local community/Friends/Peers/Relatives	11	
		Other, specify	99	

30.	What is the minimum education qualification for the entry-level workers in your organization? (Only one code)	Ability to read and write	1	Go to Q32
		Below Class X	2	
		Secondary school (Class X)	3	
		Higher secondary school (Class XII)	4	
		Diploma certificate from ITI	5	Go to Q31
		Diploma certificate from Polytechnic	6	
		Graduation	7	
		Post-Graduation	8	
		MPhil/PhD	9	
		Others, specify	99	Go to Q32
31.	What is the minimum degree course required for the entry-level workers in your organization?	Diploma in Management/Arts/Education/Design	1	Show if Q30 = 5 or 6
		Diploma in Medical/Engineering/Law/Science/Technology	2	Show if Q30 = 5 or 6
		Diploma in Tourism/Travel Management	3	Show if Q30 = 5 or 6
		Diploma in Hotel Management	4	Show if Q30 = 5 or 6
		Graduation General (BA, B.Sc. B. Com, etc.)	5	Show if Q30 = 7
		Graduation in Tourism/Travel Management (B.Sc./B.A)	6	Show if Q30 = 7
		Graduation in Hotel Management (B.Sc./ B.A.)	7	Show if Q30 = 7
		Graduate Professional (B.Tech/BE/MBBS, etc.)	8	Show if Q30 = 7
		Post-Graduate General (MA. M.Sc. M. Com, MBA etc.)	9	Show if Q30 = 6
		Post-Graduate in Hotel Management (M.Sc.)	10	Show if Q30 = 8
		Post-Graduate (Masters in Tourism Management)	11	Show if Q30 = 8
		MPhil/PhD in Hotel Management	12	Show if Q30 = 9
		MPhil/PhD in Medical/Engineering/Law/Science	13	Show if Q30 = 9
		MPhil/PhD in Management/Arts/Education/Design	14	Show if Q30 = 9
Others (Specify)	99	Show for all		
32.	How do you determine the competency of workers while selecting them? (Multiple choice questions)	Interview	1	
		Employability assessment test	2	
		Test on soft skills or other relevant skills required for the job level	3	
		Rely on professional degree/diploma or short-term course	4	
		Prior work experience in similar industry or similar work in other industry	5	
		Other, specify	99	

33.	What are the key challenges faced while recruiting for entry level candidates for jobs in your organization? (Multiple choice question)	Limited availability of appropriately trained/ technically skilled personnel/workers of both genders	1	
		Lack of appropriate educational institutions (with relevant courses) for campus recruitments within vicinity	2	
		Lack of required soft skills e.g. communication/leadership among prospective candidates	3	
		Candidates' demand for higher wages with respect to their skills	4	
		Candidates' demand for transportation	5	
		Candidates' demand for Accommodation	6	
		Lack of interest among candidates to migrate or travel long distance	7	
		Competing organizations are paying higher wages/ salaries	8	
		Higher proportion of candidates declining after completion of the recruitment process	9	
		Lack of digital literacy	10	
		Candidate's lack of preference to work on time-based shifts/ night shifts.	11	
		Lack of data literacy	12	
		Attrition/Uncertainty as hiring is generally for contractual employees	13	
Others, specify	99			
34.	Are the challenges any different in the organization while recruiting women candidates at entry level positions?	Yes	1	Go to 34
		No	0	Go to 35
35.	What are challenges in recruitment for entry-level female workers? Note – Entry level job is typically the one which can be performed without any prior work experience. (You can select multiple options)	Limited Job seekers among girls/ women	1	
		Lack of education and skill among girls/women	2	
		Lack of social acceptance	3	
		Higher proportion of female candidates declining after completion of recruitment process	4	
		Early marriage and dislocation and/or maternity-related including child-care facilities, requirements leading to higher attrition.	5	
		Higher loss of working hours due to frequent absence	6	
		Stringent laws and obligations on the employer to ensure Women's Safety etc.	7	
		Females are mostly engaged in gender stereotype role where they take care of the	8	

		family, home, children and other household work.		
		Females are less adaptable to learning new skills.	9	
		Lack of digital literacy	10	
		Lack of data literacy	11	
		Others, specify.	99	

Now we will ask you some questions about specific job roles in your organization

36.	<p>What are the top 5 job roles in which you have recruited majority of your entry level workers in the past year, i.e., FY 2022-23?</p> <p>(Multiple choice question)</p> <p>At most 5 choices can be selected</p>	<p>List is attached in the annexures.</p> <p>Others specify _____</p>		
37.	<p>What are the top 5 job roles in which you have recruited majority of your migrant/contractual workers in the past year, i.e., FY 2022-23?</p> <p>(Multiple choice question)</p> <p>At most 5 choices can be selected</p>	<p>List is attached in the annexures.</p> <p>Others specify _____</p>		Ask if they have migrant and/or contractual workers
38.	<p>What are the hard-to-fill occupations in your organization for entry-level workers?</p> <p>Ask why for hard to fill also. (Multiple choice question)</p>	<p>Show list of QPs attached in annexures.</p> <p>Others, specify</p>		
39.	<p>Why are the mentioned job roles hard-to-fill?</p> <p>(Multiple choice question)</p>	<p>Lack for manpower/employees</p> <p>Lack of technical skills or educational qualification</p> <p>Lack of soft skills i.e. communication, customer service behavior</p> <p>Long working hours</p> <p>Irregular working hours i.e. night shift, weekend shift</p> <p>High attrition rate</p> <p>Intense or physically demanding working conditions</p> <p>Migrant employees i.e., they tend to migrate easily/change location</p> <p>Language and cultural barriers</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p>	

		Limited employer benefits provided such as provident fund, health benefits etc.	10	
		Other, specify	99	
40.	What are the easy-to-fill occupations in your organization for entry-level workers?	Show list of QPs attached in annexures. Others, specify		
Now we will ask you about the estimated workforce in your organization in near future				
41.	What is the estimated number of new workers to be recruited in next 12 months?	_____		
42.	What is the estimated number of new workers to be recruited in next 36 months?	_____		
Now we will ask you some questions about Recruit Train Deploy				
Recruit Train Deploy is an opportunity where industry can engage in developing the skills of youth as per the industry/employer's requirements.				
43.	Do you know about industry funded trainings for hiring candidates through RTD-Recruit Train Deploy? (Only one code)	Yes	1	Go to 44
		No	0	Go to 47
44.	What is your awareness about RTD - Recruit Train Deploy? (Multiple choice answers)	It trains them on specific skills needed by specific industry	1	Go to 45
		It recruits fresh graduates or career changers	2	
		It is one of the solutions to bridge the skill gap in the industry	3	
		It helps in bridging difficulties in partnering with training service providers	4	
		Others, specify	99	
45.	Will you adopt the RTD – Recruit Train Deploy method for hiring employees in your organization? (Only one code)	Yes, I am interested	1	Go to 47
		Not sure, might adopt	2	Go to 47
		No	0	Go to 46
46.	Why you will not adopt RTD – Recruit Train Deploy? (Probe to understand the reason)	Not convinced about the approach	1	Go to 47
		Difficult to partner with training service providers	2	
		We do not have enough resources to conduct training or to partner with training providers	3	
		Not sure about the quality of trainers	4	
		Other, specify	99	

Section D: This section consists of enquiries related to the skills and training requirements in your organization.

S. No.	Description	Option	Code	Skip
Note: Following questions are regarding skills of workers in your organization				
47.		No difference	1	

	<p>What is the output efficiency of a formally trained employee at the time of recruitment in comparison with untrained employee?</p> <p>(Note: Formally trained means those candidates who have undergone training in a structured way or have achieved certain skill sets along with certification)</p> <p>(Only one code)</p>	<p>Formally trained person is better by untrained by Less than 10%</p> <p>Formally trained person is better by untrained between 10% to 20%</p> <p>Formally trained person is better by untrained between 20 to 30%</p> <p>Formally trained person is better by untrained between 30 to 40%</p> <p>Formally trained person is better by untrained by above then 40%</p>	<p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p>	
48.	<p>Which 5 skills are most relevant for employees in your organization?</p> <p>(You can select maximum 5 options)</p> <p>Rank in order of preference: 1 being most preferred, 5 being least preferred.</p>	<p>Critical thinking</p> <p>Adaptive Learning</p> <p>Written and verbal communication</p> <p>Literacy/ Numeracy Skills</p> <p>Complex problem solving</p> <p>Team management skills</p> <p>Social/interpersonal skills</p> <p>Evaluation, judgment, and decision-making</p> <p>Job specific technical skills</p> <p>Digital/ICT skills</p> <p>Creativity</p> <p>Job relevant language skills</p> <p>Teamwork</p> <p>Leadership</p> <p>Data Literacy</p> <p>Others</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p> <p>11</p> <p>12</p> <p>13</p> <p>14</p> <p>15</p> <p>99</p>	
49.	<p>Mention the top 5 skills most relevant to work in your organization which workers lack the most or are least proficient in?</p> <p>(You can select maximum 5 options)</p> <p>Rank in order of preference: 1 being most preferred, 5 being least preferred.</p>	<p>Complex problem solving</p> <p>Job relevant language skills</p> <p>Digital/ICT skills</p> <p>Written and verbal communication</p> <p>Adaptive Learning</p> <p>Evaluation, judgment, and decision-making</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p>	

		Team management skills	7	
		Literacy/ Numeracy Skills	8	
		Job specific technical skills	9	
		Social/interpersonal skills	10	
		Creativity	11	
		Data Literacy	12	
		Leadership	13	
		Teamwork	14	
		Critical thinking	15	
		Employees don't lack in any specific skills or knowledge needed to perform the role	16	
		Others	99	
Now, We will now ask you some questions about your workers' wages				
50.	What is the average monthly wage offered to entry-level workers in your organization?	(in INR)		
51.	Do you currently provide wage-premium to entry-level workers/ employees if they have some qualification relevant to job profile any relevant short term training courses or technical skills? (Multiple choice question, but No cannot be selected with other options)	Yes, if workers possess technical skills	1	Go to 52
		Yes, if workers have hands-on training experience.	2	Go to 52
		Yes, if they have completed relevant short term training courses/vocational courses	3	Go to 52
		Yes, others specify _____	4	Go to 52
		No, we do not provide any wage premium.	0	Go to 53
52.	Imagine two people at entry-level job, with exact same educational qualifications and work experience, but one person has additional skills (as mentioned in previous question) In such a scenario, what will you provide the average wage premium (in %) to the person with additional skills? (Only one code)	1-5% more than normal wage	1	
		6-10% more than the normal wage	2	
		11-15% more than normal wage	3	
		16-25% more than normal wage	4	
		26% and more than normal wage	5	
53.	Do you follow formal progression chart/appraisal method?	Yes, we do	1	Go to 54
		No, we do not but follow oral appraisals	2	Go to 55

		No, we do not follow any appraisals methods	3	Go to 55
54.	s What type of appraisal method do you use in your organization? (Multiple choice)	Yearly/Annual appraisals/evaluation	1	Go to 55
		Semi-annually or end of tourist season	2	
		Upon a completion of task	3	
		Other, specify	99	
55.	What has been the average attrition rate/labour turnover rate in your organization in last year FY 2022-23?	□□□ (in percentage)		
56.	What are the main causes for attrition among workers? (Multiple choice to be chosen)	Lower wage thus, not able to meet employee's demand	1	Go to 57
		Better job opportunities	2	
		Candidate's interest changes	3	
		Household duties, including farming, domestic work, child or elder care	4	
		Safety and security	5	
		Migrant/contractual nature of work	6	
		Long working hours	7	
		Other, specify _____	99	

Section E: This section consists of enquiries related to the skills and development related practices in your organization.

S.No	Description	Option	Code	Skip
Note: Following questions are regarding training of workers.				
57.	Do you currently require that skills training is needed for your workers? (Only one code)	Yes	1	Go to 58
		No	2	
58.	Does your organization have any training facility for the employees? (Only one code)	Yes	1	Go to 59
		No	2	Go to 63
59.	What kind of training facility your organization have for the employees? (Multiple choice question)	In house training	1	Go to 60
		Employer sponsored external training like Coursera	2	
		We provide opportunities for internships or apprenticeships	3	
		Others, specify	99	
60.	Have you provided any training to your employees in the past 12 months?	Yes	1	Go to 61
		No	0	Go to 62
61.	What type of training have you provided to your employees in the past 12 months? (Multiple choice question)	Critical thinking	1	Go to 66
		Adaptive Learning	2	
		Written and verbal communication	3	
		Literacy/ Numeracy Skills	4	

		Complex problem solving	5	
		Team management skills	6	
		Social/interpersonal skills	7	
		Evaluation, judgment, and decision-making	8	
		Job specific technical skills	9	
		Digital/ICT skills	10	
		Creativity	11	
		Job relevant language skills	12	
		Teamwork	13	
		Leadership	14	
		Data Literacy	15	
		Others	99	
62.	Why have you not provided any training in last 12 months?	Cost constraints/Not have enough resources	1	Go to 66
		High attrition of employees leads to wastage of training investment	2	
		Time constraints due to high paced work	3	
		Time constraints due seasonal nature of work	4	
		Lack of awareness about the skill training	5	
		We do not have the kind of work that requires skill training	6	
		Other, specify	99	
63.	Are you interested in providing skill development training?	Yes	1	Go to 64
		No	0	Go to 65
64.	Which mode of training would you like to provide? (Multiple choice questions)	In house training	1	Go to 66
		Employer sponsored external training like Coursera	2	
		We provide opportunities for internships or apprenticeships	3	
		Others, specify	99	
65.	Why would you not be interested in providing any training? (Multiple choice questions)	Cost constraints/Not have enough resources	1	Go to 67
		High attrition of employees leads to wastage of training investment	2	
		Time constraints due to high paced work	3	
		Time constraints due seasonal nature of work	4	

		Lack of awareness about the skill training	5	
		We do not have the kind of work that requires skill training	6	
		Other, specify	99	
66.	Please rate the following elements of training in terms of their importance in your decision-making with respect to the training course. Very Important – 1 Important - 2 Somehow Important - 3 Unimportant – 4 (Rate each option)	Content of the training		Go to 64
		Brand or market standing (reputation) of the Training Service Provider		
		Brand or market reputation of the certifying body		
		Quality of the trainer and/or training delivery methodology		
		Extent of practical exposure/ experience		
		Quality of internship/ apprenticeship (incl. duration, market reputation of the employer, contents covered within the internship, etc.		
67.	Which of the following skill development programs are you aware of? (Only one code allowed – yes or no)	Deen Dayal Upadhyaya Grameen Kaushalya Yojana (DDU GKY)	Yes- 1 No- 2	
		Tourism and Hospitality skill council affiliated courses	Yes- 1 No- 2	
		Capacity Building for Service Providers (CBSP)	Yes- 1 No- 2	
		Rural Self Employment Training Institutes (RSETI)	Yes- 1 No- 2	
		Apprenticeship Training Scheme (ATS)/National Apprenticeship Promotion Scheme (NAPS)	Yes- 1 No- 2	
		Pradhan Mantri Kaushal Vikas Yojana (PMKVY)	Yes- 1 No- 2	
		National Urban Livelihoods Mission (NULM)	Yes- 1 No- 2	
		Craftsman Training Scheme (CTS)	Yes- 1 No- 2	
		Kaushal Vardhan Kendra (KVK)/ 'Saksham' – KVK 2.0	Yes- 1 No- 2	
		Any other department/ state specific scheme	Yes- 1 No- 2	
		Others, specify _____		
68.	Is your organization affiliated to any of these skill development programs?	Deen Dayal Upadhyaya Grameen Kaushalya Yojana (DDU GKY)	Yes- 1 No- 2	Go to 69

(Show only the scheme names in which 'Yes' is selected in Q67)	Tourism and Hospitality skill council affiliated courses	Yes-1 No- 2
	Capacity Building for Service Providers (CBSP)	Yes-1 No- 2
	Rural Self Employment Training Institutes (RSETI)	Yes-1 No- 2
	Apprenticeship Training Scheme (ATS)/National Apprenticeship Promotion Scheme (NAPS)	Yes-1 No- 2
	Pradhan Mantri Kaushal Vikas Yojana (PMKVY)	Yes-1 No- 2
	National Urban Livelihoods Mission (NULM)	Yes-1 No- 2
	Craftsman Training Scheme (CTS)	Yes-1 No- 2
	Kaushal Vardhan Kendra (KVK)/ 'Saksham' – KVK 2.0	Yes-1 No- 2
	Any other department/ state specific scheme	Yes-1 No- 2
Others, specify _____		

Section F: This section consists of enquiries related to the technological adoption in your organization, future of jobs and automation within the tourism and hospitality sector.

S.No.	Question	Options	Code	Skip
69.	Does your organization adopt any form of technology?	Yes	1	Go to Q70
		No	0	Go to 77
70.	What is the current extent of technological adoption in your organization's business activity? (Only one code)	Very high (75-100% of tasks within jobs are automated)	1	
		High (50-75% of tasks within jobs are automated)	2	
		Medium (25-50% of tasks within jobs are automated)	3	
		Low (0-25% of tasks within jobs are automated)	4	
		No technological adoption	0	
71.	What is the extent of automation expected in your organization's	Very high (75-100% of tasks within jobs can be automated)	1	

	business activity say in next 3 years? (Only one code)	High (50-75% of tasks within jobs can be automated)	2	
		Medium (25-50% of tasks within jobs can be automated)	3	
		Low (0-25% of tasks within jobs can be automated)	4	
		No technological adoption	0	
		Don't know	98	
72.	Has there been an increase in technology adoption in your organization/ firm since COVID-19?	Yes	1	Go to Q73
		No	2	Skip to Q74
73.	Why have you introduced the technology in your organization? (Multiple choice)	For cost reduction	1	
		For quality enhancement in providing services services)	2	
		For service delivery enhancement (i.e. Delivery of services to customers)	3	
		For productivity enhancement	4	
		Others, specify	99	
74.	Are you intending to introduce any new technologies to reduce cost/enhance the quality of services/next 12 months? (Only one code)	Yes	1	Go to 75
		No	2	Go to 76
75.	Why are you intending to introduce the technology in next 12 months? (Multiple choice)	For cost reduction	1	Go to 77
		For quality enhancement in providing services services)	2	
		For service delivery enhancement (i.e. Delivery of services to customers)	3	
		For productivity enhancement	4	
		Others, specify	99	
76.		We do not have the financial capacity to introduce new technologies	1	Go to 77

Why are you not intending to introduce the technology in next 12 months? (Multiple choice)	We do not feel the requirement to automate more products/services in our organization	2	
	We do not have enough technical knowledge and/or know-how to introduce new technologies	3	
	Our processes are labour intensive	4	
	Others, specify	99	

Now we will ask you some questions about awareness and usage of technology in tourism and hospitality sector

77.	Are you aware of technological changes (such as digital marketing, customer chat support, assistance from robots, digital payment modes etc.) in the tourism and hospitality sector?	Yes		Continue to Q78
		No		End the survey
78.	What kind of changes are you aware of that are taking place within tourism and hospitality sector?	Automation and digitalization of services like digital reservations and payments, complementing concierges with chatbots, digital guide, self-check-in kiosks, in-room technology, keyless entry	Yes - 1 No -0	
		Technologies such as virtual reality and artificial intelligence have allowed companies to personalize experiences for their customers, for e.g. by reconstructing historical places or events	Yes - 1 No -0	
		Digital marketing and social media have created new marketing channels for businesses to reach their customers and build relationships	Yes - 1 No -0	
		Location-based services, and electronic customer feedback platforms have enabled service providers to offer faster, more personalized services.	Yes - 1 No -0	
		Others, specify.	99	
79.	Do you use any of these technologies in your organization on a regular basis? (Only one code for each option)	Yes, Automation and digitalization of services like digital reservations and payments, complementing concierges with chatbots, digital guide, self-check-in kiosks, in-room technology, keyless entry	1	Show only the options that are selected as 'Yes' in Q78
		Yes, Technologies such as virtual reality and artificial intelligence have allowed companies to personalize experiences for their customers, for e.g. by reconstructing historical places or events	2	

	Yes, Digital marketing and social media have created new marketing channels for businesses to reach their customers and build relationships	3	
	Yes, Location-based services, and electronic customer feedback platforms have enabled service providers to offer faster, more personalized services.	4	
	Yes, Others, specify.	99	

Now we will ask you some questions about more specific questions about awareness and usage of technology in tourism and hospitality sector

80.	Are you aware about these specific technologies being used in tourism and hospitality sector? (Only code for each option)	Digital concierge	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
		Self-check in/Keyless entry to room	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
		Front desk robotic agent	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
		Room service robot	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
		App-based reservations/transactions	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
		Chatbot customer support	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82

	Car rental app with automated processes	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
	On-demand ride sharing app	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
	Digital travel agent with AR/VR functions	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
	AI-powered travel assistant	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
	Personalized suggestions for tour with data analytics	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
	Digital itinerary planning platform	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
	AR/VR enhanced experience for sightseeing	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
	App tour guide	Yes - 1 No -0	IF YES, GO TO Q81

				IF NO, GO TO Q82
		Digital ticketing for tours	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
		Robots to wait the tables	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
		Digital menu/payment modes	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
		AI-powered meal recommendations	Yes - 1 No -0	IF YES, GO TO Q81 IF NO, GO TO Q82
		Others, specify	99	
81.	Which of the following technologies do you currently use in your organization? Show only the options that are selected as 'Yes' in Q72	Digital concierge	1	
		Self-check in/Keyless entry to room	2	
		Front desk robotic agent	3	
		Room service robot	4	
		App-based reservations/transactions	5	
		Chatbot customer support	6	
		Car rental app with automated processes	7	
		On-demand ride sharing app	8	
		Digital travel agent with AR/VR functions	9	
		AI-powered travel assistant	10	
		Personalized suggestions for tour with data analytics	11	
		Digital itinerary planning platform	12	

		AR/VR enhanced experience for sightseeing	13	
		App tour guide	14	
		Digital ticketing for tours	15	
		Robots to wait the tables	16	
		Digital menu/payment modes	17	
		AI-powered meal recommendations	18	
		Others, specify	99	
Now we will ask you questions about impact of technology in tourism and hospitality sector				
82.	In what ways do you think employment in the tourism and hospitality sector will change in future say in next 3 years? (Only one code)	Technology will lead to job displacement of workers	1	GO TO Q83
		Technology will lead to creation of new job roles	2	GO TO Q83
		Both of the above	3	GO TO Q83
		I am not aware/don't know	98	GO TO Q84
83.	According to you, what is the anticipated impact of technology in future in next 3 years? (Multiple options to be chosen)	Job-losses among less-skilled workers who perform repetitive tasks such as housekeeping; waiters; kitchen assistance	1	ASK IF Q82 = 1 OR 3
		Job-losses among medium-skilled workers who perform somewhat technology-dependent roles tasks such as data analytics	2	ASK IF Q82 = 1 OR 3
		New job-roles with specialized skills such as customer service, and operational managers etc.	3	ASK IF Q82 = 2 OR 3
		New job-roles with a greater use of digital skills such as data analytics, AI/ML etc.	4	ASK IF Q82 = 2 OR 3
		A rise in 'hybrid' jobs combining transversal skills with a basic level of 'digital fluency'	5	ASK IF Q82 = 1 OR 2 OR 3
		More efficient processes leading to productivity gains	6	ASK IF Q82 = 1 OR 2 OR 3
		Others, specify	99	
84.	Has your organization been impacted by any of the following in the recent 3 years? (Multiple options to be chosen)	Job-losses among less-skilled workers who perform repetitive tasks such as housekeeping; waiters; kitchen assistance		
		Job-losses among medium-skilled workers who perform somewhat technology-dependent roles tasks such as data analytics		
		New job-roles with specialized skills such as customer service, and operational managers etc.		
		New job-roles with a greater use of digital skills such as data analytics, AI/ML etc.		

		A rise in 'hybrid' jobs combining transversal skills with a basic level of 'digital fluency		
		More efficient processes leading to productivity gains		
		Others, specify	99	
85.	According to you, what are the top 5 job roles in your organization that will be in demand in the next 3 years, due to advancement in technology? Note: top five job roles in terms of the highest of workers.	Job role 1 ----- Job role 2 ----- Job role 3 ----- Job role 4 ----- Job role 5 ----- Show list of QPs as attached in the annexures.		
86.	According to you, what are the top 5 job roles in your organization that will become redundant in the next 3 years, due to advancement in technology? Note: top five job roles in terms of highest number of job losses	Job role 1 ----- Job role 2 ----- Job role 3 ----- Job role 4 ----- Job role 5 ----- Show list of QPs as attached in the annexures.		

Youth

Introduction

The Tourism and Hospitality Skill Council (THSC), in collaboration with PricewaterhouseCoopers Services LLP, is conducting a primary survey aiming to assess the skills needed and available in the tourism and hospitality industry across India. This study involves the participation of 10,000 youth from 120 districts. We have selected you to be a part of the survey, and therefore, you are requested to provide details about your education, work experiences, preferred skills, and career aspirations. Your responses will be kept fully confidential and private, with only the research team being able to access your data. Participation in this survey is entirely voluntary, and you have the liberty to opt out at any point. This interview will take 30 minutes of your time. Thank you for considering taking part in this important study.

Please remain assured that the responses captured under this study, will not be represented individually, and all the responses will remain confidential.

Purpose of the interview:

To gain insight into the educational and employment status of individuals aged 15 to 34 nationwide, with a particular emphasis on the tourism and hospitality sector.

Time: 30 minutes

General guidance for the interviewer (for the enumerator)

Note: The data provided by the respondent will solely be utilized for the Skill Gap Study and will be maintained with the utmost confidentiality

Target Audience (for the enumerator)

To specify the respondent profile in the survey catchment area by following categories-

1. The respondent should be at least a 10th class graduate.

2. In case of waged and/or salaried workers, the survey should only cater to the entry level workers with a work experience between 0-3 years within tourism and hospitality sector.
3. The age of respondents should be within 15 to 34 years.
4. If the respondent is a student in education or NEET, they should not be from academic backgrounds that are not related to jobs in tourism and hospitality sectors. Therefore, exclude respondents from fields like Mineral and Mining, Oil and Gas, Construction, Manufacturing, Transportation and Storage, Health/Medical, Ready-made Garments, Agriculture, or Automobile, as these areas might not align with potential movement into the tourism and hospitality sector.

Section A: This section consists of enquiries related to demographic details of the respondent.

S No.	Description	Option	Code	Skip
1.	In which state is the respondent currently located? (Only one code) (To be filled by the enumerator)	Andhra Pradesh	1	
		Assam	2	
		Bihar	3	
		Daman and Diu	4	
		Delhi NCR	5	
		Goa	6	
		Gujarat	7	
		Himachal Pradesh	8	
		Jammu and Kashmir	9	
		Jharkhand	10	
		Karnataka	11	
		Kerala	12	
		Andaman and Nicobar	13	
		Madhya Pradesh	14	
		Maharashtra	15	
		Meghalaya	16	
		Odisha	17	
		Puducherry (Pondicherry)	18	
		Rajasthan	19	
		Sikkim	20	
		Tamil Nadu	21	
		Telangana	22	
		Uttar Pradesh	23	
		Uttarakhand	24	
		West Bengal	25	
		Ladakh	26	
2.	In which district is the respondent currently located? (To be filled by the enumerator) (Only one code)	List of districts as per state in Annexure		
3.	In which block of the district is the respondent currently located?	Show block name list as per the districts		
4.	What is area type in which respondent lives in? (Only one code)	Rural	1	
		Urban	2	
		Semi Urban	3	
5.	What is name of the village/town where respondent resides?			

Section B: This section consists of enquiries related to the respondent profile.

S.No	Description	Option	Code	Skip
6.	What is your full name? (Only text allowed)			
7.	Please provide your phone number (10-digit phone number)			
8.	Please provide your email ID?	_____@_____		
9.	What is your gender? (Only one code)	Male	1	
		Female	2	
		Others	3	
10.	What is your completed age (in years)? (Restrict it from 15 to 34)	_____ years		
11.	What is the monthly income of your household? (Only one code)	₹5001 - ₹10,000	1	
		₹10,001-₹15,000	2	
		₹15,001-₹20,000	3	
		₹20,001-₹25,000	4	
		₹25,001-₹30,000	5	
		₹30,001-₹35,000	6	
		₹35,001-₹40,000	7	
		₹40,001-₹45,000	8	
		₹45,001-₹50,000	9	
		Greater than ₹50,000	10	
Do not wish to reveal	97			
Do not know	98			
12.	What is your highest completed qualification? (Only one code)	Secondary school (Class X)	1	Go to Q14
		Higher secondary school (Class XII)	2	Go to Q14
		Diploma certificate from ITI	3	Go to Q13
		Diploma certificate from Polytechnic/PMKVY/short term training	4	Go to Q13
		Graduation	5	Go to Q13
		Post-Graduation	6	Go to Q13
		MPhil/PhD	7	Go to Q13
		Others, specify	99	Go to Q13
13.	What is your highest completed course as per your qualification?	Diploma in Management/Arts/Education/Design	1	Show only if Q12 = 3 or 4
		Diploma in Tourism/Travel Management	2	Show only if Q12 = 3 or 4
		Diploma in Hotel Management	3	Show only if Q12 = 3 or 4
		Graduation General (BA, B.Sc. B. Com, etc.)	4	Show only if Q12 = 5
		Graduation in Tourism/Travel Management (B.Sc./B.A)	5	Show only if Q12 = 5

		Graduation in Hotel Management (B.Sc./ B.A.)	6	Show only if Q12 = 5
		Post-Graduate General (MA. M.Sc. M. Com, MBA etc.)	7	Show only if Q12 = 6
		Post-Graduate in Hotel Management (M.Sc.)	8	Show only if Q12 = 6
		Post-Graduate (Masters in Tourism Management)	9	Show only if Q12 = 6
		MPhil/PhD in Hotel Management	10	Show only if Q12 = 7
		MPhil/PhD in Management/Arts/Education/Design	12	Show only if Q12 = 7
		Others (Specify) _____	99	Show for all
14.	What is your current economic or educational status? (Only one code)	Student (currently enrolled and attending school/college /training)	1	Go to C
		Waged/salaried employed.	2	Go to D
		Self Employed/ Entrepreneur	3	Go to E
		Neither education nor employment nor in training (NEET)	4	Go to F

Section C: This section consists of enquiries related only to the students currently pursuing education/training. The questions are related to their current type of education; their aspirations related to work and perceptions about skills required in their desired job.

S No.	Description	Option	Code	Skip
15.	In which sector you are currently attaining education? (Single choice)	Tourism and Hospitality	1	Go to 16
		Electricity and water utility	2	Go to 17
		Wholesale and Retail	3	
		Financial Services	4	
		IT and Communication (ICT)	5	
		Education	6	
		Real Estate	7	
		Administrative services	8	
		Food and Beverage	9	
		Others, specify.	99	
16.	In which subsector within tourism and hospitality you are currently attaining education? Hotel industry Provides accommodation, meals and other services for tourists and travelers.	Hotels (such luxury hotels, guesthouses, homestays etc.)	1	Go to 17
		Food Services (such as restaurants, roadside eateries, canteens etc.)	2	
		Facility Management (hospitality services at airports, malls, corporate etc.)	3	
		Tourism – tour and travel (travel agencies etc.)	4	
		Cruise liner	5	
		Other, specify	99	

	<p>Food Services industry includes all businesses, institutions and companies which prepare meals outside the home (excluding home chefs etc.) Includes restaurants, cafes etc.</p> <p>Facility management refers to hospitality services at airports, malls, etc. but are restricted to services inside the building such as housekeeping, pantry services etc.)</p> <p>Tourism – tour and travel refers to agencies, operators engaged in arrangement of transportation, accommodation, tours etc.</p> <p>Cruise Liners – Cruise ships that carries people on voyages for pleasure.</p> <p>(Single choice question)</p>			
17.	<p>Where are you currently enrolled - in education or vocational training/skill training?</p> <p>(Short term training refers to a training with duration less than a period of 1 year and long-term training refers to training equal to 1 year or more)</p> <p>(Only one code)</p>	<p>Yes, in short term training</p> <p>Yes, in long term training</p> <p>Yes, in college/university</p>	<p>1</p> <p>2</p> <p>3</p>	<p>Go to 18</p> <p>Go to 19</p> <p>Go to 20</p>

18.	Please specify the name of short-term training or certifications you are currently enrolled in	Show the list of QPs from Annexure if 15=1 Show Other, specify if Q15 for all		Go to 21
19.	Please specify the long-term training you are currently enrolled in?	Diploma in Management/Arts/Education/Design	1	Go to 21 (Show options 2,3,99 only if 15=1 else show options 1,99 if 15=2 to 99)
		Diploma in Tourism/Travel Management	2	
		Diploma in Hotel Management	3	
		Other, specify	99	
20.	Which degree course are you currently studying in? (Only one code)	Graduate General (BA, B.Sc. B. Com, etc.)	1	Go to 21 (Show options 2,3,5,6,99 if 15=1 else show options 1,4,99)
		Graduate in Hotel Management (B.Sc./ B.A.)	2	
		Graduate in Tourism/Travel Management (B.Sc./B. A)	3	
		Post-Graduate General (MA. M.Sc. M. Com, MBA etc.)	4	
		Post-Graduate in Hotel Management (M.Sc.)	5	
		Post-Graduate (Masters in Tourism Management)	6	
		Others (Specify)	99	
21.	Do you plan to work after completing your current level of education? ... (Only one code)	Yes	1	Go to 22
		No	2	Go to section G
22.	What type of work you want to pursue? (Only one code) (Note- Choose one option which is most preferred)	Wage salaried job	1	Go to 23
		Self-employment/Entrepreneurship	2	
23.	Have you already started looking/searching for a job? (Ask this question if Q22=1) Have you already started working on the business idea?	Yes	1	Go to 24
		No	2	Go to 25

	(Ask this question if Q22=2) (Only one code)			
24.	How are you searching for a job? (Ask this question if Q22=1)	Through education/training institution in which I am currently enrolled in	1	Show if Q22=1
		Job fairs/Off campus drives	2	Show if Q22=1
	What kind of business processes have you initiated? (Ask this question if Q22=2) (Multiple Responses Possible)	Direct application to employers, Participation in a competition	3	Show if Q2=1
		Newspaper/Advertisements/Pamphlets	4	Show if Q22=1
		Local community/Friends/Peers/Relatives	5	Show if Q22=1
		Online Portals (Naukri.com/ indeed.com/linkedin.com etc.)	6	Show if Q22=1
		Recruitment Agencies	7	Show if Q22=1
		Initiated business funds (from formal or informal sources)	9	Show if Q22=2
		Arranged for location and infrastructure.	10	Show if Q22=2
		Arranged paperwork such as licenses, permits, GST filling	11	Show if Q22=2
Other (Specify) _____	99	Show if Q22=1 and 2		
25.	Ideally, in which one industry would you like to work or initiate a business after completing your current level of education? (Only one code)	Tourism and Hospitality	1	Go to 26
		Electricity and water utility	2	Go to section G
		Wholesale and Retail	3	
		Financial Services	4	
		IT and Communication (ICT)	5	
		Education	6	
		Real Estate	7	
		Administrative services	8	
		Food and Beverage	9	
		Others, specify.	99	
26.	Which sub-sector would you like to be employed in or a run a business within the Tourism and Hospitality Industry? Hotel industry Provides accommodation, meals and other	Hotels	1	Go to 27
		Food Services	2	
		Facility Management	3	
		Tourism – tour and travels	4	
		Cruise liner – cruise ships	5	
		Don't know	98	
		Others	99	

	<p>services for tourists and travelers.</p> <p>Food Services industry includes all businesses, institutions and companies which prepare meals outside the home (excluding home chefs etc.) Includes restaurants, cafes etc.</p> <p>Facility management refers to hospitality services at airports, malls, etc. but are restricted to services inside the building such as housekeeping, pantry services etc.))</p> <p>Tourism – tour and travel refers to agencies, operators engaged in arrangement of transportation, accommodation, tours etc.</p> <p>Cruise Liners – Cruise ships that carries people on voyages for pleasure.</p> <p>(Multiple choice question)</p>			
27.	<p>What is your desired kind of job role?</p> <p>(single choice under each selected category as per Q26)</p>	<p>List of QPs in the annexure according to the subsector selected in Q26 (Show this if 25=1)</p> <p>Others, specify (Show for all)</p>		Go to section G

Go to section G after this.

Section D: This section consists of enquiries related only to the **waged and/or salaried workers (i.e., Q14 = 2). The questions are related to their current type of work; their nature of work; working hours, and their perceptions about their skills.**

S.No	Description	Option	Code	Skip
28.	Which sub-sector are you employed in the	Hotels	1	Go to 29
		Food Services	2	Go to 30
		Facility Management	3	Go to 31

<p>Tourism and Hospitality Industry?</p> <p><i>Hotel industry Provides accommodation, meals and other services for tourists and travelers.</i></p> <p><i>Food Services industry includes all businesses, institutions and companies which prepare meals outside the home (excluding home chefs etc.) Includes restaurants, cafes etc.</i></p> <p>Facility management refers to hospitality services at airports, malls, etc. but are restricted to services inside the building such as housekeeping, pantry services etc.)</p> <p><i>Tourism – tour and travel refers to agencies, operators engaged in arrangement of transportation, accommodation, tours etc.</i></p> <p><i>Cruise Liners – Cruise ships that carries people on voyages for pleasure.</i></p>	Tourism – tour and travels	4	Go to 32
	Cruise liner – cruise ships	5	Go to 33
		99	Go to 33

	(Only one code)			
29.	What is the category of the firm you are currently working for within the sub-sector of hotel? (Only one code)	Luxury and Star Hotel	1	Go to 33
		Budget Hotel	2	
		Guest House	3	
		Homestays	4	
		Other, (specify)	99	
30.	What is the category of the firm within the sub-sector of Food Services? (Only one code)	Restaurant chains	1	Go to 33
		Fast food and Quick service restaurant	2	
		Independent Cafes	3	
		Canteens and Dhaba's (roadside eateries)	4	
		Outdoor catering	5	
		Other, (specify)	99	
31.	What is the category of the firm within the sub-sector of Facilities Management? (Only one code)	Hospitality related services at airport	1	Go to 33
		Hospitality related services at theatres	2	
		Hospitality related services at malls	3	
		Hospitality related services at corporate towers	4	
		Hospitality related services at guesthouses	5	
		Hospitality related services at hospitals	6	
		Other, (specify)	99	
32.	What is the category of the firm within the sub-sector of Tourism – Tour and travel? (Only one code)	Tour operators and agent	1	Go to 33
		Tour transport	2	
		Tour and Travel – Adventure Transport	3	
		Other, (specify)	99	
33.	What is your current job role? Only one code	List of QPs attached in annexure. Other, specify		Go to 34
34.	What is the skill type of work you are involved in? (Only one code)	Unskilled work (Little or no independent judgement /previous experience although familiar with occupational environment)	1	Go to 35
		Semi-skilled work (Defined nature of work wherein the major requirement is not for judgement or skill but for proper discharge of duties)	2	
		Skilled worker (Exercise considerable independent judgement and of discharge his duties with responsibilities)	3	
		Other specify	99	
35.		Full time private job	1	Go to 36
		Full time government job	2	

	What is the nature of your job? Select one code. <i>(Gig Workers are independent contractors, online platform workers, contract firm workers, on-call workers and temporary workers)</i> (Only one code)	Part time but for a continuous duration through the year	3	
		Seasonal work (i.e., working only for selected months throughout the year)	4	
		Occasional/Irregular/Gig work (e.g., Zomato, Swiggy, Uber, Ola etc.)	5	
		Others (Specify) _____	99	
36.	Years of Total Work Experience (Restrict 0 to 3)	_____ (in years)		Go to 37
37.	How many days in a week do you work on average? (Restrict from 1 to 7)	_____ (in days)		Go to 38
38.	How many hours (s) do you work in a day on an average? (Restrict from 1-24)	_____ (in hours)		Go to 39
39.	What are designated working hours per day on an average? (Maximum limit should be 24 hours)	_____ (in hours)		Go to 40 if 38>39, Go to 41 if 38<39, Go to 42 if 38=39
40.	Did you get any pay for overtime?	Yes	1	Go to 42
		No	2	
41.	Do you have a second work/job?	Yes	1	Go to 42
		No	2	
42.	How much do you earn per month from your current job?	₹5001 - ₹10,000	1	Go to 43
		₹10,001-₹15,000	2	
		₹15,001-₹20,000	3	
		₹20,001-₹25,000	4	

	(Only one code)	₹25,001-₹30,000	5	
		₹30,001-₹35,000	6	
		₹35,001-₹40,000	7	
		₹40,001-₹45,000	8	
		₹45,001-₹50,000	9	
		Greater than ₹50,000	10	
		Don't wish to reveal	98	
40.	In this job, do you have a written or a verbal contract? (Only one code)	I do not have any work contract	1	Go to 42
		I have a verbal contract	2	Go to 42
		I have a written contract	3	Go 41
41.	What is the duration of your work contract? (Only one code)	Unlimited duration (permanent)	1	Go to 42
		Limited duration between 12 and 36 months (temporary)	2	
		Limited duration under 12 months (temporary)	3	
42.	How satisfied are you with the quality and nature of your work? Quality comprises of earnings, social security benefits (if they get any, job stability or contractual nature of work, and working conditions) (Only one code)	Very Dissatisfied	1	Go to 43
		Dissatisfied	2	Go to 43
		Neither Dissatisfied nor Satisfied	3	Go to section G
		Satisfied	4	Go to 44
		Very Satisfied	5	Go to 44
43.	What is the reason for dissatisfaction with the job? (Multiple Responses Possible)	Lost interest in the type of work	1	Go to section G
		Job role does not align with my skills/educational qualification	2	
		I am not paid well according to my job role	3	
		It is not close to my place of residence	4	
		I am not willing to migrate outside my native residence for better job opportunities	5	
		I do not have an opportunity to upskill myself. Employer doesn't provide any kind of trainings	6	
		Lack of hybrid/remote work	7	
		Long/Irregular working hours	8	
		Personal reason - household and childcare work or marriage	9	
		They are inadequate social security benefits, Provident fund etc. provided by the employer	10	

		Lack of family support / social acceptance of girls being engaged in economic activity	11	
		Stagnant career growth in terms of salary	12	
		Stagnant career growth in terms of skilling	13	
		Others (specify) _____	99	
44.	What is the reason for satisfaction with the job? (Multiple Responses Possible)	Salary/wages are satisfactory according to my job	1	Go to section G
		Job role aligned to my skills/educational qualification	2	
		It is my desired/ideal job	3	
		It is close to my residence	4	
		Employer provides training to upskill the employees	5	
		The working hours are flexible	6	
		Hybrid/Remote work	7	
		Family support/Social status	8	
		They are adequate social security benefits, Provident fund etc. provided by the employer	9	
		Career growth prospects in terms of salary	10	
		Career growth prospects in terms of skilling	11	
		Others (Please Specify)	99	

Go to section G after this.

Section E: This section consists of enquiries related only to the self-employed/entrepreneur (i.e., Q14 = 3). The questions are related to their current type of work; their nature of work; working hours, and their perceptions about their skills.

S.No	Description	Option	Code	Skip
45.	Are you Self-employed/Own Account worker or entrepreneur? <i>(Self-employed is an individual working as a freelancer for a certain skill which includes 1 person i.e. himself/herself and Entrepreneur is an individual who employs others and runs the business which includes more than 1 person in a firm)</i> (Only one code)	Self-employed/Own Account worker (i.e., a person who is the sole worker in the business and does not have other paid employees/workers)	1	Go to 46
		Entrepreneur (i.e., an individual who runs a firm and pays a salary to other workers within his/her firm)	2	
46.	Which subsector of Tourism and Hospitality does your business belongs to? <i>Hotel industry Provides accommodation, meals and</i>	Hotels (such as front office associate, guest service, assistant chef in a hotel/guesthouse etc.)	1	Go to 47
		Food Services (such as assistant chef, kitchen helper, food server in a restaurant/Dhaba or any eatery but not in a hotel etc.)	2	Go to 48

	<p><i>other services for tourists and travelers.</i></p> <p><i>Food Services industry includes all businesses, institutions and companies which prepare meals outside the home (excluding home chefs etc.) Includes restaurants, cafes etc.</i></p> <p>Facility management refers to hospitality services at airports, malls, etc. but are restricted to services inside the building such as housekeeping, pantry services etc.)</p> <p><i>Tourism – tour and travel refers to agencies, operators engaged in arrangement of transportation, accommodation, tours etc.</i></p> <p><i>Cruise Liners – Cruise ships that carries people on voyages for pleasure. (Only one code)</i></p>	<p>Facility Management (such as catering manager, pantry associate for hospitality services at airport, malls, corporate etc.,)</p> <p>Tourism – tour and travels (such as tour guide, parasailing, rafting guide, tour escort etc.,)</p> <p>Cruise liner – cruise ships (such as front office associate, guest service, chef in cruise ships)</p> <p>Others, specify.</p>	<p>3</p> <p>4</p> <p>5</p> <p>99</p>	<p>Go to 49</p> <p>Go to 50</p> <p>Go to 51</p> <p>Go to 51</p>
47.	<p>Which subsector of Tourism and Hospitality does your business belongs to within the sub-sector of Hotel?</p> <p>(Only one code)</p>	<p>Luxury and Star Hotel</p> <p>Budget Hotel</p> <p>Guest House</p> <p>Homestays</p> <p>Other, (specify)</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>99</p>	Go to 51
48.	<p>Which subsector of Tourism and Hospitality does your business belongs to within the sub-sector of Food Services?</p> <p>(Only one code)</p>	<p>Restaurant chains</p> <p>Fast food and Quick service restaurant</p> <p>Independent Cafes</p> <p>Canteens and Dhaba (roadside eateries)</p> <p>Outdoor catering</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p>	Go to 51

		Other, (specify)	99	
49.	Which subsector of Tourism and Hospitality does your business belongs to within the sub-sector of Facilities Management? (Only one code)	Hospitality related services at airport	1	Go to 51
		Hospitality related services at theatres	2	
		Hospitality related services at malls	3	
		Hospitality related services at corporate towers	4	
		Hospitality related services at guesthouses	5	
		Hospitality related services at hospitals	6	
		Other, (specify)	99	
50.	Which subsector of Tourism and Hospitality does your business belongs to within the sub-sector of Tourism – Tour and travel? (Only one code)	Tour operators and agent	1	Go to 51
		Tour transport	2	
		Tour and Travel – Adventure Transport	3	
		Other, (specify)	99	
51.	What is the nature of your work? (Only one code) <i>Gig-work is generally defined as income-earning activities outside of traditional, long-term employer-employee relationships, including independent contractors, on-call workers, or temporary worker)</i>	Full Time	1	Go to 52
		Part Time but for a continuous duration through a year	2	
		Seasonal	3	
		Occasional/Irregular/Gig work (i.e. there is no exclusive work contract)	4	
		Others (Specify) _____	99	
52.	Years of Total Work Experience	_____ (in years)		Go to 53
53.	How many days in a week do you work on an average? (days)	_____ (in numbers)		Go to 54
54.	How many hours (s) in a day do you work on an average?	_____ (in numbers)		Go to 55
55.	How much do you earn per month?	₹5001 - ₹10,000	1	Go to 56
		₹10,001-₹15,000	2	
		₹15,001-₹20,000	3	

	(Only one code)	₹20,001-₹25,000	4	
		₹25,001-₹30,000	5	
		₹30,001-₹35,000	6	
		₹35,001-₹40,000	7	
		₹40,001-₹45,000	8	
		₹45,001-₹50,000	9	
		Greater than ₹50,000	10	
		Don't wish to reveal	11	
56.	How satisfied are you with your work? (Only one code)	Very Dissatisfied	1	Go to 57
		Dissatisfied	2	Go to 57
		Neither Dissatisfied nor Satisfied	3	Go to section G
		Satisfied	4	Go to 56
		Very Satisfied	5	Go to 56
57.	What is the reason for dissatisfaction with the work? (Multiple Possible) Responses	I do not have adequate skills for running the business	1	Go to section G
		I am not being able to run the business in profits/earnings are low	2	
		It requires long working hours	3	
		It requires irregular working hours i.e. night shifts, weekend shifts etc.	4	
		Personal reason - household and childcare work or marriage	5	
		Lack of family support	6	
		There is no social protection	7	
		Others (specify) _____	99	
58.	What is the reason for satisfaction with the job? (Multiple Possible) Responses	Business is profitable – higher income	1	Go to section G
		Greater independence as self-employed	2	
		It is close to my place of residence	3	
		More flexibility with respect to hours of work	4	
		I am able to utilize my skills and educational qualification in running of my business	5	
		Others (Please Specify.)	99	

Go to section G after this.

Section F: This section consists of enquiries related only to the Not in Education, Employment or Training (NEET) (i.e., Q14 = 4). The questions are related to their current type of work; their nature of work; working hours, and their perceptions about their skills.

S No.	Description	Option	Code	Skip
59.	What is the reason for your status of being neither in education nor employed nor training? (Multiple Responses Possible)	Awaiting results/applying for further education	1	Go to 60
		Scarcity of job locally – jobs not available in remote or far away location	2	
		Jobs are available but presence of only low-paid jobs	3	
		Household work consumes most part of the time	4	

		Jobs are available but not in my native place - Not willing to migrate outside state for opportunities	5	
		Lack of family support in engaging in economic activity	6	
		Do not have adequate skills to get a job	7	
		Jobs are available – but require long/irregular hours, or night shifts	8	
		Preparing for government jobs	9	
		Others (specify) _____	99	
60.	For how long you have been in the NEET Category i.e., you are neither employed nor in training/education? (Only one code)	Less than 6 months	1	Go to 61
		6 months- 1 years	2	
		1- 2 years	3	
		2- 3 years	4	
		3- 4 years	5	
		4-5 years	6	
		More than 5 years	7	
61.	Have you worked ever before? This also includes self-employment/business/job. (Only one code)	Yes	1	Go to 62
		No	2	Go to 64
62.	When was the last time you worked in a paid job/work/business? (Only 1 digit number is allowed for year and 2-digit number is allowed for months)	___ year ___ month		Go to 63
63.	Years of total work experience	_____ (in years)		Go to 64
64.	Are you willing to work? (Only one code)	Yes	1	Go to 65
		No	2	Go to section G
65.	What type of work are you looking for? (Only one code) (Note- Choose one option which is most preferred)	Look for a wage salaried job	1	Go to 66 if 65=1, Go to 69 if 65=2, Go to section G if 65=98,99
		Self-employment/Entrepreneurship	2	
		Do not know/unsure	98	
		Other (Specify) _____	99	
66.	Are you actively searching for a job? (Only one code)	Yes	1	Go to 67
		No	2	Go to 68
67.	How long have you been actively looking for a job? (Only one code)	More than one year	1	Go to 68
		Over the last year	2	
		Over the last 6 months	3	

		Over the last month	4	
		Over the last week	5	
68.	How are you looking for a job? (Multiple Responses Possible)	Job fairs	1	Go to 69
		Direct application for employers, participation in a competition	2	
		Newspaper/Advertisements/Pamphlets	3	
		Local community/Friends/Peers/Relatives	4	
		Online Portals (Naukri.com/ indeed.com/linkedin.com etc.)	5	
		Recruitment Agencies	6	
		Other (Specify)	99	
69.	Ideally, in which industry would you like to work? (Single choice question)	Tourism and Hospitality	1	Go to 70
		Electricity and water utility	2	Go to 71
		Wholesale and Retail	3	
		Financial Services	4	
		IT and Communication (ICT)	5	
		Education	6	
		Real Estate	7	
		Administrative services	8	
		Food and Beverage	9	
		Don't know	98	
		Others, specify.	99	
70.	Which sub-sector would you like to be employed or a run a business in the Tourism and Hospitality Industry? (Multiple choice question)	Hotels (such as front office associate, guest service, assistant chef in a hotel/guesthouse etc.)	1	Go to 71
		Food Services (such as assistant chef in a restaurant/Dhaba, kitchen helper, food server etc.)	2	
		Facility Management (such as catering manager, pantry associate for hospitality services at airport, malls, corporate etc.)	3	
		Tourism – tour and travels (such as tour guide, parasailing, rafting guide, tour escort etc.,)	4	
		Cruise liner – cruise ships (such as front office associate, guest service, chef in cruise ships)	5	
		Don't know	98	
		Others	99	
71.	What kind of job role you would like to attain? (Single choice)	List of QPs in the annexure according to the subsector selected. (Show for 69=1) Other, specify (Show for all)		Go to section G

Go to section G after this.

Section G: Career Aspiration

This section consists of enquiries related to all the respondents. The questions are related to their career aspirations, higher education aspirations, perceptions about gig work and income expectations.

S.No	Description	Option	Code	Skip
72.		Yes	1	Go to 73

	<p>Do you wish to go for further education beyond your current level of education?</p> <p>(Note – For students in education/training – Do you wish to continue their education after their current education they are pursuing)</p> <p>(Only one code)</p>	No	0	Go to 75
73.	<p>What is the highest level of education you want to attain?</p> <p>(Only one code)</p> <p>(Note for programmer –This should comply with question 12 and question 18, this restriction doesn't apply to diploma choices)</p>	<p>Higher secondary school (Class XII)</p> <p>Diploma certificate from ITI</p> <p>Diploma certificate from Polytechnic/PMKVY/short term training</p> <p>Diploma certificate from college/University</p> <p>Graduation</p> <p>Post-Graduation</p> <p>MPhil/PhD</p> <p>Others, specify</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>99</p>	Go to 74
74.	<p>Which subject do you want to study?</p> <p>(Only one code)</p>	<p>Diploma in Management/Arts/Education/Design</p> <p>Diploma in Medical/Engineering/Law/Science/Technology</p> <p>Diploma in Tourism/Travel Management</p> <p>Diploma in Hotel Management</p> <p>Graduation General (BA, B.Sc. B. Com, etc.)</p> <p>Graduation in Tourism/Travel Management (B.Sc./B.A)</p> <p>Graduation in Hotel Management (B.Sc./ B.A.)</p> <p>Graduate Professional (B.Tech/BE/MBBS, etc.)</p> <p>Post-Graduate General (MA. M.Sc. M. Com, MBA etc.)</p> <p>Post-Graduate in Hotel Management (M.Sc.)</p> <p>Post-Graduate (Masters in Tourism Management)</p> <p>MPhil/PhD in Hotel Management</p>	<p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p> <p>11</p> <p>12</p>	<p>Show if 73=2 or 3 or 4</p> <p>Show if 73=2 or 3 or 4</p> <p>Show if 73=2 or 3 or 4</p> <p>Show if 73=2 or 3 or 4</p> <p>Show if 73=5</p> <p>Show if 73=5</p> <p>Show if 73=5</p> <p>Show if 73=5</p> <p>Show if 73=6</p> <p>Show if 73=6</p> <p>Show if 73=6</p> <p>Show if 73=7</p>

		MPhil/PhD in Medical/Engineering/Law/Science	13	Show if 73=7
		MPhil/PhD in Management/Arts/Education/Design	14	Show if 73=7
		Others (Specify) _____	99	Show for all
75.	What is your career/work aspirations in next 6 months? (Only one code) (This question will be asked to all) Note : For students currently enrolled in education, ask they career aspiration in next 6 months of completing their current level of education	I want to do a salaried job (either private/government)	1	Show if 14=1 or 4
		I want to do my own business/self-employed	2	Show if 14=1 or 4
		I am currently wage salaried, and want to continue the job	3	Show if 14=2
		I am currently wage salaried but want to start my own business/self employed	4	Show if 14=2
		I am currently running my business/self-employed but want to attain a job	5	Show if 14=3
		I am currently running my business and want to continue my business	6	Show if 14=3
		Stay at home	7	Show to all
		I want to prepare for government exams	8	Show to all
		I want to pursue only higher education	9	Show to all
		Don't know/unsure	10	Show to all and go to Q78
		Other, specify	99	Show for all
76.	Based on your previously mentioned choice of career aspiration, what are the key factors determining career aspirations? Please mention the top 3 factors (Multiple Responses Possible)	Flexible work contract	1	Go to 77
		Availability of social protection benefits (disability, maternity/paternity benefits etc.)	2	
		Provision of decent pay	3	
		Well-defined and followed working hours (i.e., decent work-life balance)	4	
		Opportunities for continuous learning and upskilling	5	
		Sense of purpose/impact on society	6	
		Diversity and inclusion	7	
		Well-being programs and incentives	8	
		Location i.e. close to residence	9	
		Job security	10	
		Social Prestige/Recognition, Family acceptance	11	
		Growth prospects	12	
		Others, specify	99	
77.	How would you rate the following criteria for you, when applying/ searching for job opportunities? Rank for each answer choice provided. Mark on a rating scale of 1 to 4 were, 1 = Not important 2 = Somewhat important 3 = Important	Flexible work contract	1	Go to 78
		Availability of social protection benefits (disability, maternity/paternity benefits etc.)	2	
		Provision of decent pay	3	
		Well-defined and followed working hours (i.e., decent work-life balance)	4	
		Opportunities for continuous learning and upskilling	5	
		Sense of purpose/impact on society	6	
		Diversity and inclusion	7	
		Well-being programs and incentives	8	
		Location i.e. close to residence	9	
		Job security	10	
		Social Prestige/Recognition, Family acceptance	11	

	4 = Very Important	Growth prospects	12	
		Others, specify	99	
78.	Are you interested in pursuing opportunities as a Gig Worker (Uber / Ola / Zomato / Swiggy – short term contract-based job)? <i>(Gig Workers are independent contractors, online platform workers, contract firm workers, on-call workers and temporary workers)</i> (Only one code)	Yes	1	Go to 79
		No	2	Go to 80
		Can't say	3	Go to 78
79.	What are the reasons that you find the Gig Economy attractive to work in? Multiple Responses Possible	Low Entry Barrier in terms of Skill / Education Qualification	1	Go to 81
		Lack of other employment opportunities	2	
		To earn higher income in the gig economy	3	
		To get flexibility in work hours	4	
		To work independently/self-managed employment	5	
		To challenge me in a new form of work	6	
		Variety of work	7	
		To be paid for my performance as compared to a fixed salary	8	
		For a supplement income in addition to the current income	9	
		Changing attitude towards freelancing	10	
	Others, specify.	99		
80.	What do you find unattractive about gig jobs? (You can select multiple responses)	Lack of career progression	1	Go to 81
		Variable salary	2	
		Lack of structure in the work schedule	3	
		Lack of social status	4	
		Short term contract	5	
		Lack of social security benefits	6	
		Others, specify	99	
Now we will ask you some questions about career counselling services				
81.	Are you aware about career counselling services in your native area?	Yes	1	Go to 82
		No	2	Go to section H
82.	Do you currently utilize (or have recently utilized) career counselling services to meet your career aspirations?	Yes	1	Go to 84
		No	2	Go to 83
83.	Do you want to utilize career counselling services	Yes	1	Go to 85
		No	2	Go to Section H

	to meet your career aspirations in next 1 week?			
84.	What are the services provided by the career counselling services? Multiple Responses Possible	Information on relevant vacancies	1	Go to 85
		Advice on how to start your own business	2	
		Guidance in application for desirable jobs i.e. resume building, cover letter	3	
		Guidance in application for admission in training or educational programmes	4	
		Others (Specify) _____	99	
85.	For what services, do you currently utilize (or want to utilize) the career counselling services? Multiple Responses Possible	Information on relevant vacancies	1	Go to section H
		Advice on how to start your own business	2	
		Guidance in application for desirable jobs i.e. resume building, cover letter	3	
		Guidance in application for admission in training or educational programmes	4	
		Others (Specify) _____	99	

Go to Section H

Section H: Awareness of Technological Advancement and Future of Work. The questions in this section are related to the changes required in skill development and teaching due to technological advancements.

S. No	Description	Option	Code	Skip
86.	In general, do you anticipate any change in employment and/or skilling due to technological advancements? (Only one code)	Yes, in skilling	1	Go to 87
		Yes, in employment	2	Go to 88
		Yes, in both	3	Go to 87 and then 88
		No change	0	Go to section I
		Not aware/Don't know	98	Go to section I
87.	According to you, in general what kind of changes in approach to skill development and teaching will happen in response technological advancements? (You can select multiple options)	There will be more focus on workforce readiness skills such as digital literacy, resume writing, time management etc	1	Go to 87 or 88 depending on 86
		There will be more focus on teaching soft skills such as communication, adaptability, interpersonal skills etc.	2	
		There will be more focus on teaching technical skills such as virtual or AI apps for digital check-ins at hotels or facial recognition	3	
		There will be more focus on entrepreneurial skills such as initiative, innovation, creativity, curiosity, business execution etc.	4	
		There will be more focus on computer programming and software skills such as to handle websites, customer enquiry chat box etc, technology driven experiences for customers	5	
		There will be emergence of more practical teaching methods such as team-based	6	

		learning, experiential learning etc., rather than chalk and talk based curriculum-aligned		
		There will be introduction of new study programs in digital technologies to be developed	7	
		There will be an increased number or need for inter-disciplinary or multi-disciplinary courses	8	
		Others, specify	99	
88.	According to you, in general, what kind of changes can take place in employment ecosystem in response technological advancements? (Only one code)	There will be emergence of more job opportunities across sectors	1	Go to 89
		There will be elimination of some job opportunities across sectors	2	
		There will be both elimination/ redefinition of existing jobs, but also creation of new jobs	3	
		Don't Know	98	
		Other specify	99	
89.	In what ways you see your employment prospects to get affected due to technological advancements? (You can select multiple options)	I will have more and better methods of exchange and connectivity with colleagues	1	Go to section I
		I will have more job opportunities to work remotely such as will have to work with customers virtually	2	
		There will be fewer job opportunities since most of the jobs will be displaced by machines/robots	3	
		I will have opportunities to work in non-standard forms of employment such as platform economy, gig economy etc.	4	
		Others, specify	99	

Go to section I.

Section I: Skill Training Preference – The questions in this section are related to skilling training relevant for work and the changes required in skill development and teaching.

S.No	Description	Option	Code	Skip
90.	Are you aware of the following programme / schemes/councils?			
a.	Recognition Of Prior Learning (RPL) Certification <i>(Recognition of Prior Learning (RPL) is a skill certification component to enable Indian youth to take on industry relevant skill certification. Individuals with prior learning experience or skills can register themselves and get assessed and certified under the RPL component of PMKVY.)</i>	Yes	1	Go to 91
		No	0	

b.	Deen Dayal Upadhyaya Grameen Kaushalya Yojana (DDU GKY) / Sagarmala <i>Market-led, placement linked skill development program for providing wage employment</i>	Yes	1	
		No	0	
c.	Pradhan Mantri Kaushal Vikas Yojana (PMKVY) / National Skill Development Corporation (NSDC) <i>It is a Skill Certification Scheme which enables a large number of Indian youth to take up industry-relevant skill training that will help them in securing a better livelihood.</i>	Yes	1	
		No	0	
d.	Craftsman Training Scheme (CTS) / ITIs	Yes	1	
		No	0	
e.	Apprenticeship Training Scheme (ATS) -NAPS	Yes	1	
		No	0	
f.	Rural Self Employment Training Institutes (RSETI)	Yes	1	
		No	0	
g.	Kaushal Vardhan Kendra (KVK)/ 'Saksham' – KVK 2.0	Yes	1	
		No	0	
91.	According to you, which 5 skills are most relevant for a job/work? (You can select maximum 5 options) Rank in order of preference: 1 being most preferred, 5 being least preferred.	Critical thinking	1	
		Adaptive Learning	2	
		Written and verbal communication	3	
		Literacy/ Numeracy Skills	4	
		Complex problem solving	5	
		Team management skills	6	
		Social/interpersonal skills	7	
		Evaluation, judgment, and decision-making	8	
		Job specific technical skills	9	
		Digital/ICT skills	10	
		Creativity	11	
		Job relevant language skills	12	
Teamwork	13			

		Leadership	14	
		Data Literacy	15	
		Accounting/Financial Management	16	
		Sales/Marketing	17	
		Others	99	
92.	Rank the above-selected skills in order of preference of relevance according to you? (This is to be asked for options chosen above)	Critical thinking	1	Go to 93
		Adaptive Learning	2	
		Written and verbal communication	3	
		Literacy/ Numeracy Skills	4	
		Complex problem solving	5	
		Team management skills	6	
		Social/interpersonal skills	7	
		Evaluation, judgment, and decision-making	8	
		Job specific technical skills	9	
		Digital/ICT skills	10	
		Creativity	11	
		Job relevant language skills	12	
		Teamwork	13	
		Leadership	14	
		Data Literacy	15	
		Others	99	
93.	For which skills you would be interested in for training for among the skills discussed?	Show the skills selected in above question 91	Yes – 1 No - 0	Go to 94
94.	Are you interested in a skill development training in the sector of tourism and hospitality?	Yes	1	Go to 95
		No	0	Go to section J
95.	In which sub-sector of tourism and hospitality you will be interested in pursuing a training? (Multiple choice question)	Hotels	1	Go to 96
		Food Services	2	
		Facility Management	3	
		Tourism – tour and travels	4	
		Cruise liner – cruise ships	5	
		Others, specify	99	

96.	Which of the following Skill Training types are you interested in? (Multiple choice question)	Short term certificate courses (less than 6 Months duration)	1	Go to 97
		Entrepreneurship/Self-employment specific short-term courses	2	
		Long term certificate courses (c)	3	
		Diploma courses (1 Year to 2 Year duration)	4	
		Degree level vocational courses (3 years)	5	
		PG/PG Diploma level vocational courses	6	
97.	Would you be interested in a Part-time or Full-time skill training?	Part-Time	1	Go to 98
		Full-Time	2	
98.	Would you prefer a residential training or a non-residential training?	Residential training	1	Go to 99
		Non-residential training	2	
		No Preference	3	
99.	Are they willing to pay for such skill training mentioned above?	Yes	1	Go to 100
		No	2	Go to 101
100.	What is the minimum would you be willing to pay for such courses mentioned above? (Rs)	___ INR		Go to 101
101.	Please rate the following elements of training in terms of their importance in your decision-making with respect to the training course. Very Important- 1 Important- 2 Somehow Important- 3 Unimportant- 4	Content of the training		Go to 102
		Brand or market standing (reputation) of the Training Service Provider		
		Brand or market reputation of the certifying body		
		Quality of the trainer and/or training delivery methodology		
		Extent of practical exposure/ experience		
		Quality of internship/ apprenticeship (incl. duration, market reputation of the employer, contents covered within the internship, etc.		
102.	What are the major challenges/constraints that would stop you from undergoing training programme? (Multiple Question) Response	Financial constraints to pay the fees	1	Go to section J
		Non-availability of such training in the neighborhood	2	
		Lengthy and long drawn process	3	
		Community does not support it	4	
		Do not have enough support from my immediate family	5	
		I do not have support/ permission from spouse	6	
		Family responsibilities (household chores, taking care of children etc.)	7	
		Absence of quality training service providers/ trainers	8	
		Absence of flexibility in time – say part-time or evening or weekend only courses	9	

	Absence of time for training (either over-worked or other commitments – social, professional etc.)	10	
	Others (Please Specify.....)	99	

Section J: Migration – The questions in this section are related to willingness to migrate outside their native places.

S.No.	Question	Option/format	Code	Skip
103.	Are you willing to migrate?	Yes	1	Go to 104
		No	2	Go to 111
104.	What is your preferred migration choices? (Multiple choice question)	Outside district but within the same state I reside in	1	
		Outside state I reside in but within the country	2	
		Outside India	3	
105.	Which district within the state are you willing to migrate to? <i>(You can select Multiple options for this question; Please choose top 3 relevant options)</i>	District Preference 1: ____ District preference 2: ____ District preference 3: ____		Ask if 104=1
106.	Why did you choose these districts?	Have a family member/friend who is present there	1	Ask if 104=1
		Large number of people from my native place or from neighborhood are there	2	
		For better salary	3	
		For better work culture	4	
		For better standard of life	5	
		It is easier to get job in these districts	6	
		For employment/business opportunities	7	
		Acceptable to family	8	
		Suggested/Recommended by friends/teachers/family members	9	
		Others, specify	99	
107.	Which state do you want to migrate to within India? <i>(Please write down only top 5 state names;</i> <i>(Please enter data in CAPITAL LETTERS only)</i>	State preference 1: _____ State preference 2: _____ State preference 3: _____ State preference 4: _____ State preference 5: _____ Show the state list		Ask if 104=2
108.	Why do you prefer these states in within India? (Multiple response possible)	Have a family member/friend who is present there	1	Ask if 104=2
		Large number of people from my native place or from neighborhood are there	2	
		For better salary	3	

		For better work culture	4	
		For better standard of life	5	
		It is easier to get job in these states	6	
		For employment/business opportunities	7	
		Acceptable to family	8	
		Suggested/Recommended by friends/teachers/family members	9	
		Others, specify	99	
109.	Which country do you want to migrate to? (Multiple choice)	Country preference: _____ Country preference: _____ Country preference: _____		Ask if 104=3
110.	Why is this your country of preference to migrate? (Multiple Response Possible)	Have a family member/friend who is present there	1	Ask if 104=3
		Large number of people from my native place or from neighborhood are there	2	
		For better salary	3	
		For better work culture	4	
		For better standard of life	5	
		It is easier to get job in these districts	6	
		For employment/business opportunities	7	
		Acceptable to family	8	
		Suggested/Recommended by friends/teachers/family members	9	
		Others, specify	99	
111.	Please state the reason(s) for not willing to migrate for employment opportunities.	Want to stay close to my family	1	Go to section K
		Safety issues	2	
		Will not be able to adapt to a newer environment	3	
		Language barrier	4	
		Not aware of opportunities	5	
		Others (please specify_)	99	

Go to Section K, after this section.

Section K: Willingness to work in Tourism and Hospitality- This section briefs about the willingness of respondents to work in the tourism and hospitality and understanding their reasons of willingness or reluctance.

S.No.	Question	Option/format	Code	Skip
112.	Would you want to pursue a career in tourism and hospitality? (Show this if 14=1,4) OR	Yes	1	Go to 113
		No	2	Go to 114

	Will you want to continue to work in Tourism and Hospitality sector? (Show this if 14=2,3)			
113.	Why would you like to work in Tourism and Hospitality? (Multiple choice question)	Personal interest/Passion	1	End the survey
		Align with my skills/educational qualification	2	
		Desire for a diverse and dynamic environment	3	
		Job opportunities availability and stability	4	
		Potential for financial incentives	5	
		Seasonal or flexible work	6	
		Family/friends already work in this sector	7	
		Entrepreneurial ambitions to start a business in this sector	8	
		Career growth prospects	9	
		Other, specify	99	
114.	Why would you not like to work in Tourism and Hospitality? Multiple choice question	Desire for different career path	1	End the survey
		Doesn't align with my skills/educational qualification	2	
		Preference for more office-based or traditional work environment	3	
		Perception of seasonal and temporary job positions	4	
		Unpredictable income and financial stability	5	
		Concerns about irregular or long working hours	6	
		Negative stereotypes or preconceptions about the industry	7	
		Concerns about work-life balance	8	
		Limited opportunities for career growth/advancements	9	
		Others (specify) _____		

Annexure F: List of Qualification Packs Offered by Tourism and Hospitality Skill Council

TABLE 30: SUBSECTOR WISE LIST OF NSQF ALIGNED QUALIFICATION PACKS

Hotel and Cruise Liners	Food Services - Restaurant	Facility Management	Tour and Travel
Assistant Chef	Assistant Chef	Billing Executive	Adventure Travel Guide
Banquet Manager (Operation)	Barista Executive	Cafeteria Supervisor	Assistant Instructor -Rope Activities
Bartender	Chef de Partie	Catering Manager	Assistant Rafting Guide
Barista Executive	Cleaner-Roadside Eatery	Facility Management Executive	Camp Helper

Hotel and Cruise Liners	Food Services - Restaurant	Facility Management	Tour and Travel
Chef de Partie	Commis Chef	Facility Manager	Customer Service Executive (Meet & Greet)
Commis Chef	Counter Sales Executive- Tourism and Hospitality	Multi - Purpose Associate	Ground Crew Chief
Concierge Manager	Demi Chef De Partie	Pantry Associate	Ground Staff (Paratrike, Paramotoring, Paragliding)
Demi Chef De Partie	Eatery Owner		High Altitude Trekking Guide
Duty Manager	Food & Beverage Controller		Himalayan Expedition Logistics and Pathfinder (HAP)
Executive Chef	Food & Beverage Service - Associate		Instructor - Rope Activities
Executive Housekeeper	Food & Beverage Service Assistant		Meeting Conference & Event Planner
Food & Beverage Service - Associate	Food Delivery Associate		Mountain Cuisine Chef
Food & Beverage Service Assistant	Food Server-Roadside Eateries		Mountaineering Instructor
Food & Beverage Service Manager	Kitchen Helper		Nature Guide
Food Outlet Manager	Kitchen Steward		Naturalist (wildlife tourism)
Front Office Manager	Pastry/Bakery Commis		Paragliding Tandem Pilot
Front Office Trainee	Quality Control Manager- Tourism and Hospitality		Parasailing (Equipment) Driver
Guest House Caretaker	Restaurant Captain		Parasailing (Equipment) Supervisor
Guest Service Associate (Front Office)	Restaurant Manager		Parasailing Launcher/Receiver
Guest Service Associate (Housekeeping)	Store Assistant- Tourism and Hospitality		Rafting Guide/Safety Kayaker
Home Stay Host	Street Food Vendor - Standalone		Sardar
Housekeeping Manager			Ski Instructor
Housekeeping Supervisor			Team Leader- Travel
Housekeeping Trainee			Tour Guide
Kitchen Steward			Tour Manager
Kitchen Stewarding Supervisor			Transport Coordinator- Tourism and Hospitality
Laundry Associate		Transport Duty Manager	
Laundry Supervisor		Travel Advisor	
Pastry/Bakery Commis		Walk Tour Facilitator	
Quality Control Manager-Tourism and Hospitality			
Restaurant Captain			
Revenue Manager			
Sous Chef			
Store Assistant- Tourism and Hospitality			

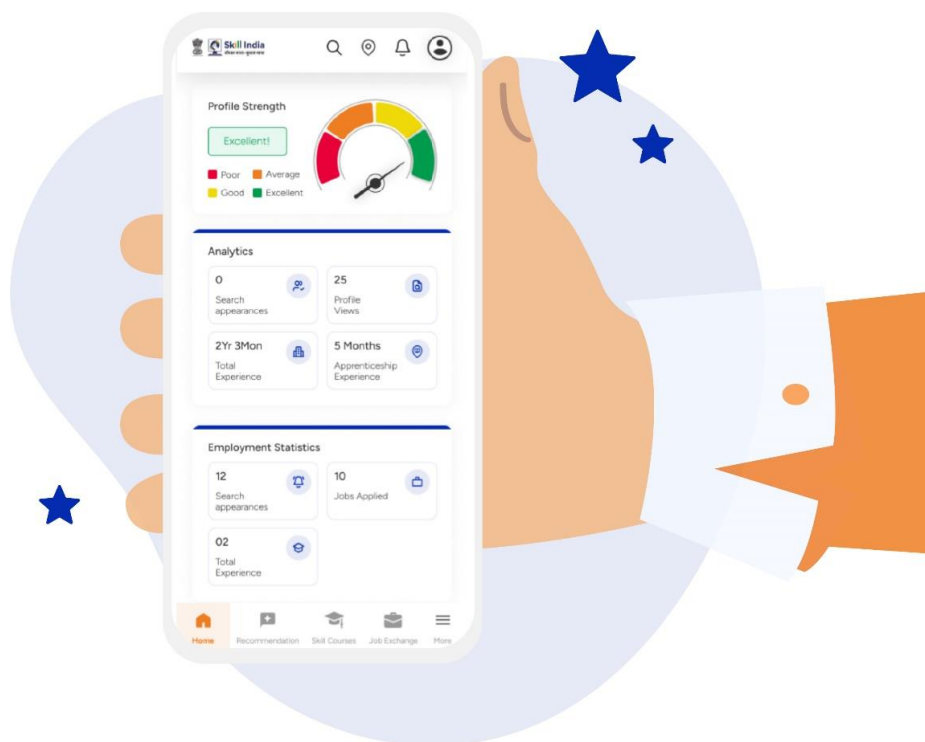
The Skill India Digital (SID) HUB

Skill India Digital (SID) is a purpose-built initiative precisely crafted to empower, strengthen, and develop the skill sets of individuals across India through a cutting-edge online training ecosystem. Seamlessly integrating API-based authentication for skill credentials, secure payment gateways, and an extensive job and entrepreneurial discovery infrastructure, SID stands as a beacon for fostering widespread access to high-quality skill development opportunities.

Conceived under the auspices of the Ministry of Skill Development and Entrepreneurship, Skill India Digital (SID) represents a transformative leap forward in reshaping India's skills, education, employment, and entrepreneurial landscape. It epitomizes the government's commitment to democratizing skill enrichment and fostering entrepreneurial aspirations across the nation.

At its core, SID embodies the aspirations of millions of Indians striving for improved prospects and a prosperous future. By offering a diverse array of industry-relevant skill courses, facilitating access to employment opportunities, and providing robust entrepreneurial support, the platform catalyses individual growth and national progress.

Founded with a forward-looking approach, SID endeavours to revolutionize skill development by leveraging digital technologies and prioritizing Industry 4.0 competencies. This pioneering platform is poised to revolutionize talent acquisition practices, enabling swifter hiring of skilled professionals while fostering a culture of continuous learning and career advancement.



Download the Skill India Digital Hub App!

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