



Kerala Tourism - The Role of the Government and Economic Impacts

January 2018

Abstract

Kerala is the first state in India to declare tourism as an industry. The tourism policy documents of the central and state governments claim that Kerala tourism model is one of the most liberalised tourism models with the private sector leading tourism development. Tourism constitutes 10 per cent of Kerala's GDP, as per official statistics, and reportedly contributes around 23.5 per cent to the total employment in the state. However, the truth is there is no reliable picture of the economic effects of tourism on Kerala.

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Acknowledgement

The Centre for Public Policy Research (CPPR) team is extremely thankful to all those who contributed towards developing the ideas in the report. The authors specifically acknowledge all the stakeholders of the Kerala tourism industry, who actively participated in the discussions, which helped in developing this report into its final form.

Executive Summary

Kerala tourism has won several national and international recognitions, mainly due to the region's picturesque beauty and state's responsible tourism projects. Based on the tourism policy documents of the central and state governments, the Kerala tourism model is acclaimed as one of the most liberalised tourism models with the private sector leading tourism development and the state acting as a facilitator rather than a regulator. Kerala government's tourism expenditure is one among the highest in the country. Tourism constitutes 10 per cent of Kerala's GDP, as per official statistics, and reportedly contributes around 23.5 per cent to the total employment in the state. This study, however, shows that most of the claims made by the government about Kerala tourism are inflated.

Though found to be highly unsuccessful and ineffective, the government has spent a significant amount of money on government-run tourism services. The government plays the role of the lead provider of accommodation facilities and is in complete charge of tourism promotion and marketing. At the same time, the potential of innovative products like home stays and houseboats is not tapped for lack of incentives to the entrepreneurs. This study shows that though the government policies were investor friendly in paper, they were actually harming the investors rather than promoting them. Kerala's international tourism sustains on visitors from a few countries, while domestic tourism is dependent on tourists from within the state, despite the huge spending on tourism promotion by the government. The claims of the economic advantages of tourism are based on unreliable statistics, along with an all-inclusive definition of tourists, which do not come under the realm of the state's tourism policy.

The study shows the need for the government to act as a facilitator by providing the basic infrastructure conducive for tourism and allow the private sector to play the lead role in tourism promotion and development. Tourism promotion and marketing should be the responsibility of the private sector, which will help in implementing innovative marketing methods for attracting international tourists from more countries and domestic tourists from other states. This will help in exploiting the natural potential of Kerala tourism rather than placing artificial constraints on tourism development in the state through government interventions. The study demands a reliable procedure for collating the tourist database in the state that distinguishes tourists based on the type of visa and purpose of visit. The economic impacts of tourism should be analysed using this database for getting a reliable picture in this regard.

1. Introduction

Tourism has emerged as an important sector globally, contributing to around 10 per cent of global GDP, 9.4 per cent of global employment, 7 per cent of global exports and 30 per cent of service exportsⁱ. International tourism receipts earned by destinations worldwide surged from USD 2 billion in 1950 to USD 1260 billion in 2015ⁱⁱ. International tourist arrivals worldwide also increased from 25.3 million in 1950 to 1186 million in 2015. Tourism growth is no longer concentrated in the industrial countries, as emerging markets have also developed into major players in the global tourism industry since the 1980s. Global studies have shown that the tourism sector has performed better in relatively free market conditions, where the role of the governments would be facilitators and supporters with the private sector playing a major role in tourism developmentⁱⁱⁱ.

Europe topped the destination wise market share (51.2 per cent) for both international tourism receipts and international tourist arrivals worldwide, followed by Asia and the Pacific (23.5 per cent) and America (16.2 per cent) in 2015^{iv}. South Asia constituted only 1.5 per cent of worldwide international tourist arrivals and 2.5 per cent of international tourism receipts^v. Among the South Asian countries, India has a market share of only 1.12 per cent of international tourist arrivals and 2 per cent of international tourism receipts in the world, while, in South Asia, it has the highest market share in terms of both^{vi}.

India has a global ranking of 52 out of 140 countries and 11 among the Asia Pacific countries in the travel and tourism competitiveness index released by the World Economic Forum's Travel and Tourism Competitiveness Report 2015. The tourism industry contributes to 7 per cent of GDP and accounts for 5 per cent of employment in India^{vii}.

Kerala was the first Indian state to declare tourism as an industry and launch the Tourism Vision 2025 strategy document^{viii}. Kerala's tourism brand, namely 'Kerala - God's Own Country', was the first to be registered as a brand with the Government of India's registry of trademarks^{ix}. Kerala tourism has won several national and international recognitions, mainly due to the region's picturesque beauty and state's responsible tourism projects^x. The tourism policy documents of the Ministry of Tourism and Culture, Government of India, and the Kerala Government state that the Kerala tourism model is one of the most liberalised tourism models with the private sector leading tourism development and the state acting as a facilitator rather than a regulator^{xi}. The government expenditure on tourism in Kerala is one among the highest in India, greater than the national average, as per the recent statistics by the Planning Commission^{xii}. Kerala's tourism expenditure as

percentage of the total state expenditure is 1.27 per cent, while the national average is only 0.49 per cent.

Tourism constitutes 10 per cent of Kerala's GDP, as per official statistics, and reportedly contributes around 23.5 per cent to the total employment in the state^{xiii}. Despite the huge potential of the sector for contributing to economic growth and employment, global tourism studies show that the benefits from tourism in many places are overestimated^{xiv}. The reason includes the issues associated with the definition of tourists and the measurement of the economic impacts of tourism^{xv}. The economic impacts of the estimates for tourism rest heavily on good estimates of the number and types of visitors, as mentioned in global studies on tourism^{xvi}. Thus, whether the contributions from tourism to the Kerala economy are commensurate with the huge investment made by the state in tourism depends on the quality of the estimates of the number and types of tourists.

Despite the huge investment in tourism and the awards and recognitions that Kerala tourism has received, Kerala is becoming a less-preferred destination for tourists, say government reports and market studies^{xvii}. The state does not even figure among the top 10 tourist destination states for domestic tourist arrivals, as per the statistics released by the union tourism ministry in 2014^{xviii}. Kerala occupies only seventh position among the top 10 tourist destination states in India for foreign tourists. The state recorded a meagre share of 4.1 per cent of total foreign tourist arrivals (FTAs) in India, while India itself had a meagre share of 1.12 per cent of FTAs in the world in 2015^{xix}. There has also been a decline in the annual growth rate of earnings from Kerala tourism since 2004, as per the official tourism statistics published by the Department of Tourism^{xx}.

Given this background, there is a need to study if the claims about Kerala tourism are actual or inflated. This paper critically evaluates Kerala's claim of following a liberalised model of tourism development. It also analyses whether tourism has been an engine of growth and employment in the state.

2. Kerala Tourism - Historical Narratives and Stakeholders

Kerala launched its tourism development programmes with the establishment of the international beach resort in Kovalam in 1976, with central government patronage. In the 1980s, the state government initiated Kerala tourism as a hospitality department. Recognising the huge economic potential of tourism in the state, the government declared tourism as an industry, vide an order dated July 11, 1986. Since then, the state government has extended several incentives, which were available to the investors in other industrial sectors, to the tourism sector, aimed at creating an investment-friendly atmosphere for tourism.

The Tourism Department formed in 1958 renamed as the Department of Tourism in 1981 is the government agency responsible for the promotion, planning and development of tourism in the state. The infrastructure development schemes were implemented through line departments such as Irrigation Department, Public Works Department, Central Public Works Department etc and through Public Sector Units (PSUs) such as Kerala Tourism Development Corporation Ltd (KTDC), Kerala Industrial Technical Consultancy Organization (KITCO), Kerala Tourism Infrastructure Ltd (KTIL), Bekal Resorts Development Corporation Ltd (BRDC) etc.

The Department of Tourism assists the District Tourism Promotion Councils (DTPCs) in all the districts for the execution of these projects. The department asserts that DTPCs are the source of specific district wise local information related to all destinations in a district^{xxi}. Main lending institutions like Kerala Financial Corporation (KFC), Travel Financial Corporation of India (TFCI) and Kerala State Industrial Development Corporation (KSIDC) play an important role in funding tourism projects in the state. The stakeholders from the private sector in tourism include tour operators, hotels, resorts, home stays and houseboat entrepreneurs as well as the associations related to these concerns.

The first tourism policy of Kerala was announced in 1995, which remains the basis for much of the state's progress in terms of infrastructure, tourism development and product performance. The key role played by the private sector in all these areas was identified in addition to defining the role of the state as a facilitator, creating a suitable condition for investments by setting up the basic infrastructure for tourism to grow. The policy focused on public-private partnership (PPP) for tapping the tourism potential of the state and thus making it an ideal instrument for social and economic growth. Based on the tourism policy, the first Kerala Travel Mart was held in the state as PPP in 2000. The Kerala Travel Mart is an annual tradeshow, wherein the state hosts tour operators and media from

around 50 to 60 countries, and buyers and sellers directly interact to close deals and packages^{xxii}.

Our interviews with stakeholders suggest that though the Kerala Travel Mart is said to be a PPP model in tourism, where the government acts as facilitator-catalyst for fostering entrepreneurship, the government sets the norms based on which the private players function. The Secretary of Tourism and Director of Tourism for the Government of Kerala and the Managing Director of KTDC are ex-officio members of the Managing Committee of the Kerala Travel Mart. The affairs of the society management are executed in accordance with the rules and regulations specified in the memorandum of association, set by the government. The other members should be the stakeholders approved by the government. This means that the government has the upper hand in Kerala Travel Mart through setting the norms, though it is declared a PPP buyer-seller meet in tourism trade.

Tourism Vision 2025, the policy document prepared by the Department of Tourism and approved by the State Government in 2002, is aimed at making tourism in the state a private sector activity with the state playing the role of a catalyst and facilitator^{xxiii}. The government asserts that its focus is on the development of basic infrastructure for the promotion of new tourism products for tapping the tourism potential of Kerala. Strategies such as infrastructure development with respect to accommodation and supporting facilities have to come from the private sector, based on the tourism policies of Kerala. Tourism infrastructure projects are proposed to be implemented, hereafter, primarily through private investments. Though certain incentives and subsidies are being offered for tourism projects, the policy, in the long term, is to phase out financial incentives and concessions, and attract investments based on merits, by providing the necessary infrastructure and facilities. Further, even basic infrastructure projects are to be implemented with increasing degree of financial participation by non-government entities. Despite these, our interviews with entrepreneurs show the lack of investor-friendly atmosphere in Kerala's tourism sector, as opposed to the claims in the policy documents. This is discussed in detail in the next section.

The stated tourism policies of the successive governments like the first tourism policy of 1995, the second tourism policy of 2012 and the vision 2025 document aim to promote Kerala as a quality destination, attracting high-spending tourists than going for mass tourism chasing numbers^{xxiv}. The tourism policy documents of the state thus show that the government targets niche tourism, where tourists display characteristics of being environmentally aware, independent, flexible and quality conscious than those forming the bulk of the mass market. This clearly means that tourism is not treated as a public

good, while profit motive is the reason for government investments in the sector. This conscious strategy of taking destination Kerala away from mass tourism to a destination with a boutique image, attracting tourists of a specific taste required developing new tourism products and new destination regions like eco-tourist destinations, backwaters, houseboats, Ayurveda rejuvenation centres, home stays, and Meetings, Incentives, Conferences and Exhibitions (MICE).

Though the objective of the state’s tourism policies is to attract high-spending tourists, different survey-based studies show that majority of the foreign and domestic tourists visiting the state are budget tourists, who do not have much spending power^{xxv}. In particular, these studies have shown that special tourism products like eco-tourist destinations are not able to attract high-income groups, while most of the tourists visiting these destinations belong to lower monthly income classes. The tourists visiting the backwaters, designated as one among Kerala’s special tourism products, are mainly from low-income categories, as against high-income groups aimed in the tourism policies.

The next section critically evaluates the tourism policies of the state with respect to expenditure on tourism, the role of the private sector in tourism development and the economic impacts of tourism on the state.

3. Myths and Realities of Kerala Tourism

3.1. Expenditure on Tourism

Table 1: State and Union Government Funding to Kerala Tourism since 2011-12 (₹ crore)

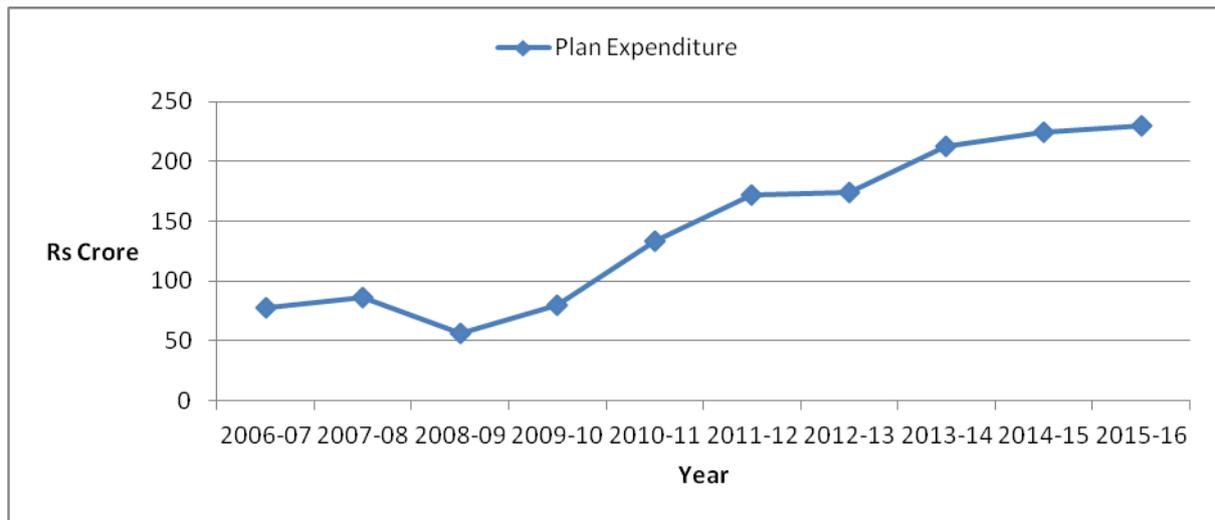
Year	State Funding	Union Funding	Total Funding
2011-12	182.49	23.76	206.25
2012-13	180.53	78.26	258.69
2013-14	214.89	34.67	249.56
2014-15	245.36	0	245.36
2015-16	230.45	99.34	329.79

Source: Department of Tourism, Government of Kerala

Table 1 shows that the major portion out of the total funding for Kerala tourism comes from state funding.

The state government’s total plan expenditure on tourism increased from ₹86.3 crore in 2006-07 to ₹230.45 crore in 2014-15, as shown in Figure 1. The government spending on tourism in Kerala is one among the highest in India.

Figure 1: Tourism Sector Expenditure in Kerala



Source: Government of Kerala (2016)^{xxvi}

The component wise plan expenditure from 2007-08 to 2015-16 shows that out of the total expenditure on tourism, more than half went to infrastructure, ranging from 88 per cent in 2007-08 to 71 per cent in 2015-16. The next major expenditure was on marketing (ranging from 11 per cent to 21 per cent), followed by human resource development and other activities (ranging from 1 per cent to 9 per cent)^{xxvii}. Among the infrastructure component, however, major allocation is for general infrastructure, consisting of created infrastructure for tourism that would be implemented through various line departments with little role for the Department of Tourism, and not for basic tourism infrastructure as such. In 2007-08, out of the total plan amount of ₹75.9 crore allotted to infrastructure, 98 per cent went to general infrastructure that would be implemented by other line departments and only 2 per cent went to basic tourism infrastructure as such. In 2014-15, out of the total plan amount of ₹92.3 crore allotted to infrastructure, 90 per cent went to general infrastructure that would be implemented by other line departments and only 10 per cent went to basic tourism infrastructure as such. According to the tourism policies of the state, the Department of Tourism should focus on the development of basic infrastructure for the promotion of new tourism products for tapping the tourism potential of Kerala, leaving the rest to private investors. However, the trends in plan expenditure

show that this claim is a myth, since majority of the allocations went to general infrastructure projects, which were implemented by the line departments, while the department had no role to play in their implementation.

3.2. Role of Private Sector

According to the stated tourism policies of the government, the government would only be a facilitator and strategies such as infrastructure development, with respect to accommodation and supporting facilities, promotion and marketing have to come from the private sector. This section evaluates whether this claim is real or fictitious.

3.2.1. Tourism Infrastructure Development

KTDC, a Kerala government company headquartered at Thiruvananthapuram, focuses on tourism-related infrastructure like hotel and restaurant services, boating operations, need-based travel assistance, support services etc. At present, the corporation has 71 units, which include nine premium hotels, eight budgeted hotels, 14 tamarind easy hotels, 12 motels, three restaurants, 18 restaurants-cum-beer parlours, one Central Reservation Cell (CRC), three Tourist Reservation Centres (TRC), two travel divisions and one shopping complex. It has been donning the hat of the official host of the ‘God’s Own Country’ for many years.

Table 2 shows the amount invested and the profits and returns on the investment and capital employed from KTDC between 2006-07 and 2015-16.

Table 2: Financial Performance of KTDC

	2006-07	2007-08	2008-09	2010-11	2015-16
Paid up capital(₹ crore)	48.6	59.45	70.7	77.70	99.3
Capital employed (₹ crore)	41	43.12	47	69.06	86.8
Net profit/Loss after tax and before interest (₹ crore)	2.08	1.96	1.41	1.00	0.75
Return on investment (%)	1.2	1.66	1.19	0.92	0.81

Source: Government of Kerala Review of Public Enterprises (various issues) and CAG Report 2011

There has been a huge rise in the paid up capital and capital employed for KTDC from 2006-07 to 2015-16, as is evident from Table 2. The tourism statistics by the Department

of Tourism also show that the total government expenditure on KTDC rose from ₹31 million in 2007-08 to ₹65 million in 2014-15^{xxviii}. Despite this, Table 2 shows that all the profitability indicators, namely net profits and returns on investment, show a declining trend for KTDC and are very low compared to the hospitality industry as a whole. While the net profit ratio was 0.75 for KTDC in 2015-16, the net profit ratio average for the Indian hospitality industry was 30 per cent. While the returns on investment were 0.81 per cent for KTDC in 2015-16, they were 20 per cent for the Indian hospitality industry in the same year^{xxix}. This shows the poor profitability of KTDC, despite the rising investment in the government-owned company and huge government allocations for KTDC. The low profitability was mainly due to the poor occupancy rate of the KTDC hotels compared to other hotels in the state. The average occupancy rate of the KTDC hotels varied from 27 per cent to 42 per cent in the period from 2006-07 to 2010-11, as against the state average of 59.85 per cent to 68.90 per cent in the same period^{xxx}. Reports also show the failure of KTDC in tapping the revenue earning potential of the boating services operating in Thanneermukkam, Kochi and Kumarakom in this period. All these have resulted in the declining profitability of KTDC, despite huge government spending in the company. Thus, the government acts as a provider of tourism infrastructure rather than a facilitator in Kerala through KTDC, which shows poor results despite huge investments.

Globally, studies have shown that the operation of tourism services, which could be profitable, is not always successful in the public sector. The state is hardly a successful hotel operator in most countries like the UK, Spain, Portugal and New Zealand. Many hotel properties in the UK have been privatised with good results^{xxxi}. In India, the case of privatisation of many loss-making hotels owned by the state-run Indian Tourism Development Corporation in the recent years for the improvement of the financial health of these hotels, shows that the state is not a successful hotel operator^{xxxii}.

3.2.2. Promotion and Marketing of Tourism

As per the Government Order, G.O. (P) No. 254/88/GAD dated July 28, 1988, DTPCs were set up in all districts with the objective of promotion of tourism and leisure activities in each district^{xxxiii}. DTPCs are said to be the source of specific district wise local information related to all destinations in a district. They are also supposed to implement various projects funded by the Department of Tourism. The Government of Kerala spends huge amount on DTPCs every year. While the government allotted ₹200 lakh for assisting DTPCs in 2007-08, the amount increased to ₹550 lakh in 2014-15^{xxxiv}. The government is the only player in the marketing of Kerala tourism, which contradicts the tourism policies of the state. Kerala tourism is marketed through the website of the Department of Tourism. The

Government of Kerala claims that the Kerala tourism website attracts the maximum number of visitors among all the state tourism websites in the country^{xxxv}. International festivals and road shows are conducted in most nations, including the UAE, China, Russia, Singapore, the UK, the US, Spain, Germany, Australia, Malaysia, Sri Lanka, Bangladesh, France, Poland, Japan, Canada, Norway and Finland for marketing tourism^{xxxvi}. Moreover, the department conducts road shows in almost all major cities in India. The Grand Kerala Shopping Festival (GKSF), organised by the Department of Tourism in association with finance, industries and commerce ministries as well as the Local Self Governments (LSGs), is aimed at transforming the state into a hub for international shopping experience and thereby launching ‘shopping tourism’ in the state^{xxxvii}.

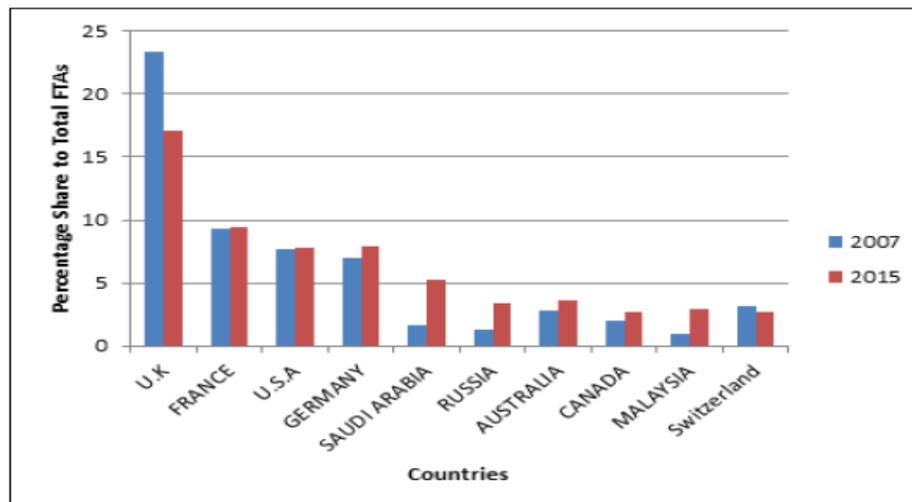
Despite these, the study report of the committee appointed by the Government of Kerala in 2005 noted DTPCs functioning as ineffective in assisting travellers. It also expressed concern over the poor maintenance of tourism properties in the districts. A mechanism headed by the Chief Secretary to monitor and coordinate the activities of various departments involved in implementing tourism projects was set up in 2005 based on the government order, G.O. (MS) No. 05/05/GAD dated January 3, 2005^{xxxviii}.

Our personal interviews with stakeholders revealed that tourists mainly depended on travel websites like Trip Advisor and Lonely Planet along with travel agencies and information centres for information related to tourism. They give the least importance to DTPC websites for local information on tourism destinations in a district. Recent survey-based studies also support our findings^{xxxix}. This shows the ineffectiveness of DTPCs in providing local information to tourists, despite the huge government spending on DTPCs.

The Department of Tourism claims GKSF a big success in marketing Kerala products. According to the Comptroller and Auditor General (CAG) Report of 2013, around ₹143.45 crore was spent for GKSF during 2007-12, out of which 68 per cent was government funding. Around ₹10 crore was released for infrastructure development and upgrade of traditional marketplaces, without any specific guidelines for their implementation in this period^{xl}. One of the main intentions of GKSF had been to give a fillip to the trade and commerce sectors in Kerala, especially in hill produces like spices, traditional products of coir, handlooms and handicraft, and to upgrade infrastructure facilities of traditional marketplaces^{xli}. The CAG report pointed out that due to the absence of any specific guidelines for the utilisation of the allotted ₹10 crore, state-specific industries dealing with products such as spices, cashew, marine and handloom had no active participation in GKSF. This has resulted in incurring a loss of ₹44.58 crore to the exchequer.

Despite the government’s significant claims regarding tourism marketing and the huge government spending on marketing, of around 20 per cent of the total amount spent, nationality wise statistics on FTAs from the Department of Tourism show that the foreign tourism earnings are dependent on some nations specifically. Figure 2 shows that the maximum share of FTAs are from the UK, the US, France, Germany and Saudi Arabia. While the UK share of FTAs ranges from 21.2 per cent to 17.1 per cent, the US share of FTAs ranges from 9.4 per cent to 7.8 per cent in the period 2007-2015. The FTA share of France ranges from 8.8 per cent to 9.3 per cent, Germany ranges from 5.75 per cent to 7.9 per cent and Saudi Arabia ranges from 1.5 per cent to 5.23 per cent in the same period^{xlii}. This means that majority of FTAs in Kerala are consistently from the UK, the US, European nations and Saudi Arabia, despite the widespread marketing activities in almost all countries, including Latin American and South Asian countries like Sri Lanka and Bangladesh, and South East Asian, East Asian and Middle East countries.

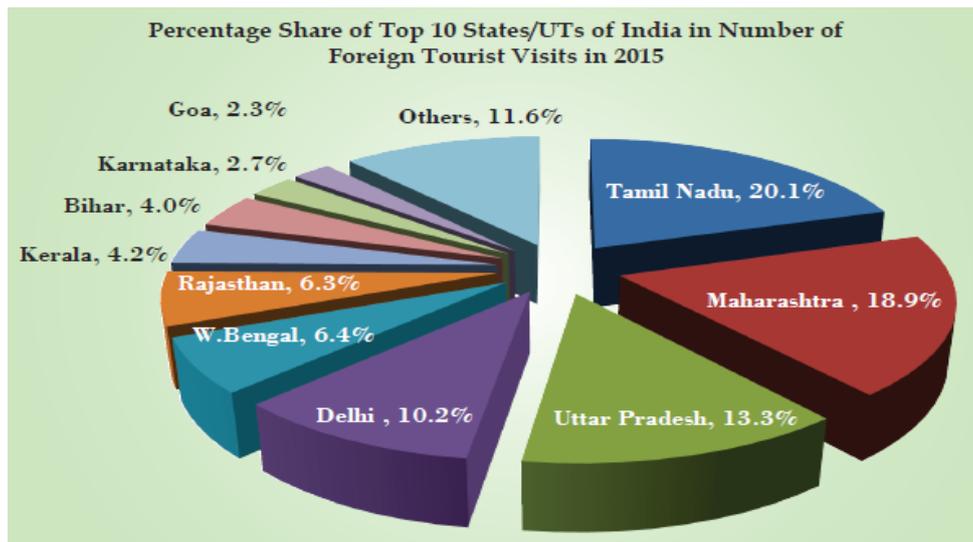
Figure 2: Share of FTAs in Kerala from Top Ten Countries in 2007 and 2015 (%)



Source: Economic Review (2016), Government of Kerala

Figure 3 shows that while Kerala accounted for 4.2 per cent, Tamil Nadu accounted for 20.1 per cent of the total FTAs in the country in 2015. Despite the huge amount spent for the marketing of Kerala tourism by the Kerala government, the state occupies only the seventh position among the top 10 preferred destination states in India. The position has been stable for the past many years. This shows the ineffectiveness of the marketing activities of Kerala tourism, which is mainly done by the state government. While it can be argued that Kerala tourism aims at attracting high-spending tourists and not mass tourism, it is evident that our tourist destinations are not able to attract luxury tourists with high-spending power.

Figure 3: Share of Top 10 Indian States in FTAs in India



Source: Government of India (2015)^{xliii}

Among the domestic tourist arrivals in Kerala, more than half of the total arrivals have been from Kerala itself in the period 2009-15, ranging from 75.05 per cent to 75.8 per cent^{xliv}. Though the Kerala tourism website claims to attract the maximum number of visitors among all the state tourism websites in the country and road shows are being conducted in all major Indian cities, majority of the domestic tourists are from Kerala. This is followed by a small share of tourists from the South Indian states like Tamil Nadu (8.02 per cent), Karnataka (4.61 per cent) and Andhra Pradesh (1.83 per cent). All the other Indian states, except Maharashtra (2.8 per cent), have a negligible share in the domestic tourist arrivals^{xlv} in Kerala. Domestic tourism accounts for up to 70 per cent of tourism in the houseboat industry of Kerala, which is claimed as an innovative product of Kerala tourism in the vision 2025 document. Thus, travellers from within Kerala constitute the main share of users of this acclaimed product.

3.2.3. Role of Private Investors

Tourism is considered one among the key investment zones in Kerala^{xlvi}. The tourism policies of the state government emphasise on an investor-friendly environment in the state, with the government providing many incentives to the investors in the sector. Our interviews with stakeholders prove this claim to be a myth.

In order to open a restaurant, an entrepreneur has to obtain more than 20 approvals from different departments, dangerous and offensive license from municipality/panchayat/corporation, license from the Food Safety and Standards

Authority of India (FSSAI) and No Objection Certificate from different departments like sales tax, labour department, pollution control board etc.

House boats are declared as an innovative product of Kerala tourism for attracting high-spending tourists in Kerala tourism's vision 2025 document. Houseboat owners have to register with the Department of Tourism for getting incentives, which is a time-consuming and cumbersome process that deters entrepreneurs. Houseboats, major hotels and resorts are under the purview of the Water Act, 1974, and have to obtain a 'consent to establish' for setting up business and a 'consent to operate' for discharging trade effluents and sewage. Legal structures pertinent to houseboat tourism in the backwaters consist of regulations regarding environment under the Kerala State Pollution Control Board (KSPCB), security under the Kerala Port Department and labour laws under the Department of Labour. The houseboat owners need to acquire a certificate from KSPCB in order to get the final registration certificate from the Port Office. In the case of wastewater management, the legislation administered by the Pollution Control Board (PCB) is relevant, and PCBs at the central and state levels are responsible for its implementation. The Central Pollution Control Board coordinates the activities of the state boards. Small houseboat owners with one or two boats, who are already under duress to repay their loans from the government, have to endure additional costs for complying with the regulations, thus causing them financial difficulties^{xlvii}.

Home stays are declared as another innovative product of Kerala tourism for attracting high-spending tourists. Kerala has the highest number of home stays in India. For starting operations, home stay owners have to get licenses from the Department of Tourism for classification based on criteria like room number and size, fluency in English by at least one of the family members etc, through an online procedure. However, the travel booking websites show that visitor ratings are higher for many non-classified home stays than those approved as classified by the Department of Tourism. Our interviews with foreign tourists disclose that they select home stays based on visitor ratings in the travel websites, which, in turn, are based on criteria like homely environment, cleanliness, friendly behaviour, value for money, services, location etc. Thus, it can be deduced that the selection of home stays by foreign tourists does not depend on the classification of the home stays by the Department of Tourism.

Once accredited with the Department of Tourism, home stays with two or more rooms are charged a luxury tax of 0.5 per cent. They also pay a commercial tariff for water for electricity. LSGs charge additional taxes on home stays for procuring the ownership certificate. Along with these, classified home stays have to get the FSSAI license.

Consequently, home stays turn into business units, resulting in the loss of a homely environment that the policy intends. Our interviews with stakeholders reveal that due to such constraints, most home stay owners prefer not to be categorised as classified, though they meet the criteria of the Department of Tourism for classification. As per the statistics available with the Kerala Home Stay and Tourism Association, the number of classified home stays in Kochi is just 65, while the number of non-classified home stays runs to more than 300. In countries like Thailand, Vietnam and Cambodia, where tourism has picked up over the past few years, home stays and houseboats have emerged as major attractions for travellers. Tapping the potential of these innovative products will help in attracting more tourists, boosting the revenue from tourism and providing more employment opportunities from tourism.

3.3. Economic Impacts of Tourism

3.3.1. Tourist Arrivals

Tourist arrival is one of the main indicators of the demand for tourism in a particular destination. Table 3 presents the data on the foreign and domestic tourist arrivals in Kerala from 2006 to 2015. It shows that though FTAs are increasing in absolute terms, the annual growth rate declined from 23.7 per cent to 5.86 per cent in the period 2006-15. As pointed out earlier, foreign tourists are mainly from the UK, the US, European countries and Saudi Arabia, according to available official statistics. The domestic tourist arrivals have increased from 62,71,724 in 2006 to 12,46,5571 in absolute terms, while in terms of the annual growth rate, there is only a marginal rise from 5.47 per cent to 6.59 per cent. The official statistics confirm that majority of the domestic tourists are from Kerala itself.

Table 3: Domestic and Foreign Tourist Arrivals in Kerala

Year	Foreign Tourists	Annual Growth Rate (%)	Domestic Tourists	Annual Growth Rate (%)
2006	4,28,534	23.7	62,71,724	5.47
2007	5,15,808	20.37	66,42,941	5.92
2008	5,98,929	16.11	75,91,250	14.28
2009	5,57,258	-6.96	79,13,537	4.25
2010	6,59,265	18.31	85,95,075	8.61

2011	7,32,985	11.18	93,81,455	9.15
2012	793,696	8.28	100,76,854	7.41
2013	858,143	8.12	108,57,811	7.75
2014	9,23,366	7.6	116,95,411	7.71
2015	9,77,479	5.86	124,65,571	6.59

Source: Government of Kerala (2016)^{xlviii}

Though the official figures confirm the above-mentioned trends, it is difficult to quantify the economic effects of tourism, since there are many problems associated with the tourism statistics in India, Kerala, in particular, like definition issues^{xlix}. The definition of foreign tourists by the Department of Tourism is, “A foreign tourist is a person visiting India on a foreign passport staying at least 24 hours in the country, the purpose of whose journey would include either leisure (recreation, holiday, health, study, religion and sport) or business, family mission and meeting and not for activities for which remuneration is obtained.”^l The definition of domestic tourists is, “A person who travels within the country to a place other than his usual place of residence and stays at hotels or accommodations run on commercial basis for a duration of not less than 24 hours or one night and not for more than 12 months at a time for pleasure, pilgrimage, religious and social functions, business conferences and meetings, study and health.”^{li} These definitions are based on the Government of India’s definition of foreign tourists, following the definitions of the UN World Tourism Organisation (WTO) and the World Travel and Tourism Council (WTTC). The definition of foreign tourists thus explicitly includes people travelling for the following reasons - recreation, holiday, healthcare, education, religion, sports event, business meet, family mission and meeting. In the case of domestic tourists, the people visiting their friends and relatives and those who travel for temporary employment are not included in the definition, while students, businesspersons and officials travelling for professional reasons are included in the definition.

The tourism policy documents largely refer to the distinct realm of leisure travelling and do not include students, businesspersons and officials travelling for professional reasons and people visiting their friends and relatives. At the same time, foreign tourist statistics include them as tourists, while domestic tourist statistics include students, businesspersons and officials travelling for professional reasons but not those visiting their friends and relatives, which are inconsistent with the tourism policy documents. This

results in inconsistencies and hyperbolic claims with respect to the quantitative importance of tourism.

The Department of Tourism's continuous survey in 2012-13 shows that out of the 8.58 lakh foreign tourists who came to Kerala in 2012-13, nearly 87 per cent (7.4 lakh) came for leisure and recreation, while 13 per cent came for business purposes and visiting relatives. On the domestic front, only 29 per cent came to the state for leisure. Almost 33 per cent of domestic tourists came for conferences, which is the highest among the states, as per the survey. The rest came for religious, educational and healthcare purposes.

This shows that the numbers presented as foreign and domestic tourists can be inflated values and cannot be consistent with the tourism policy documents. Categories like business and family meetings, and educational, religious and health purposes need not fall completely in the realm of tourism policy. Their visits may have been beneficial to the state, but they are not tourists in the real sense. It would be the policy concern of the government departments other than the tourism department to promote the visits of those who are not tourists in the real sense. Thus, the distinction between tourists and non-tourists is blurred and the numbers depend on the definition of tourists, which seems to be inconsistent with the tourism policy documents.

The Kerala tourism department collects foreign and domestic tourist statistics from accommodation establishments regularly through the Economics and Statistics Department, Government of Kerala. The tourist statistics published based on the data can be inflated, since the Department of Tourism asks for the data on foreign tourists based on the nationality in their passports and those on domestic tourists based on their residing states. The questionnaire does not include a query on the purpose of visit. The covering letter and the sample questionnaire sent by the Department of Tourism to accommodation establishments in 2015 are attached as Appendix 1. Thus, it is clear that foreign and domestic tourists can include those visiting India for purposes like business meetings, family visits, sport events etc along with real international tourists coming for leisure and recreation. On the other hand, Form C, which needs to be submitted by the accommodation establishments to the Foreigner Regional Registration Offices (FRRO) under the Bureau of Immigration, Government of India, contains questions based on classification like the type of visa and the purpose of visit under each type of visa. Table 4 shows the discrepancies in the FTA statistics from FRRO and the Department of Tourism for Ernakulam district. Ernakulam consistently tops in attracting foreign tourists in Kerala, accounting for a share of 39.2 per cent in 2015. The data in Table 4 prove that the FTA statistics collected by the Department of Tourism for Ernakulam district are inflated.

Table 4: Discrepancies in FTA Statistics from Ernakulam District

Year	Department of Tourism Statistics	Statistics based on Form C
2015	383643	205026
2016	407653	278436

Source: Government of Kerala, FRRO

A study by the Kerala State Planning Board (2015ⁱⁱⁱ), employing a unique methodology based on the per capita GDP of Euro countries, also shows that the FTA statistics of Department of Tourism are inflated. This study estimates the tourism demand model of FTAs in Kerala using an econometric model, covering the period from 1995 to 2011, based on the data collected from Kerala Tourism Statistics, India Tourism Statistics and Economic Review of Kerala. Foreign tourist visit to Kerala is estimated using this equation with the per capita GDP of Euro area as explanatory variable, since the majority of FTAs in Kerala are from European countries. It shows that the income elasticity of foreign tourist visit to Kerala in relation to the per capita GDP of Euro countries is 3.3, which means FTAs are sensitive to income fluctuations of the tourists. This means that 1 per cent increase/decline of Euro area's per capita GDP leads to 3.3 per cent increase/decline in FTAs in Kerala. Going by this equation, FTAs should have come down drastically rather than go up in many years, as claimed by the department, due to the fluctuations in per capita GDP in the Euro countries, especially after the global financial crisis of 2008. The board estimates that FTAs in the state will be only 1.86 million by 2020, while the department estimates place the tourism arrival figure at 3 million for 2020 with an annual growth rate of 15 per cent, which is unrealistic.

It can be concluded that the assessment of economic impacts of tourism based on the official domestic and foreign tourist arrival statistics in Kerala is unreliable.

3.3.2. Income/Earnings and Employment Generated by Tourism

Tourism is flaunted as an engine of growth and a major contributor of employment and income to a large part of Kerala's population.

Table 5: Income/Earnings from Tourism in Kerala

Year	Foreign Exchange Earnings (₹ crore)	Annual Growth Rate of FEE (%)	Earnings from Domestic Tourists (₹crore)	Annual Growth Rate of Domestic Tourist Earnings (%)	Total Revenue Generated from Tourism (Direct & Indirect) (₹ crore)	Annual Growth Rate of Total Revenue (%)
2006	1,998.40	28.09	4,891.94	14.26	9,126.00	17.94
2007	2,640.94	32.82	5,978.65	22.21	11,433.00	25.28
2008	3,066.52	16.11	6,832.13	14.28	13,130.00	14.84
2009	2,853.16	-6.96	7122.18	4.25	13,231.00	0.77
2010	3,797.37	33.09	9282.68	30.33	17,348.00	31.12
2011	4,221.99	11.18	10131.97	9.15	19,037.00	9.74
2012	4,571.69	8.28	10,883.00	7.41	20,430.00	7.32
2013	5,560.77	21.63	11,726.44	7.75	22,926.55	12.22
2014	6,398.93	15.07	12,981.91	10.71	24,885.44	12.11
2015	6,949.88	8.61	13,836.78	6.59	26,689.63	7.25

Source: Government of Kerala (2016)^{liii}

Table 5 shows the official statistics on foreign exchange earnings (FEE), earnings from domestic tourists and the total revenue generated from tourism collected by the Department of Tourism. It shows that though these three units increased in absolute terms from 2006 to 2015, their annual growth rates declined significantly in this period.

The internal survey of the tourism department in 2012 revealed that the tourism sector generated 12 lakh employment. Including the ancillary services, the total number is 14 lakh. As per the official figures of the Department of Tourism, the tourism sector contributed 23.5 per cent to the total employment in the state from 2009 to 2012, much higher than the contribution of tourism to employment at the national level.

Table 6: Tourism Sector’s Contribution to Kerala’s Total Employment between 2009 and 2012 (%)

Share in Employment (in per cent)			
Country/ State	Direct Impact	Indirect + Induced Impact	Total Impact
India	4.4	5.8	10.2
Kerala	9.9	13.6	23.5

Source: Government of Kerala (2016): Economic Review, State Planning Board

The credibility and validity of the claim that tourism is an engine of growth and a major contributor to employment in Kerala hinges on the statistics showing the quantitative significance of the tourism sector and, consequently, on the definition of tourism and tourists^{liv}. In the first place, the figures for income and employment are based on the aforementioned, all-inclusive definition of tourists. This implies that almost all travel-related and not exclusively the tourism-related employment and earnings are accounted. FEEs include the earnings obtained from the consumption expenditure of travellers, who arrived for official and family purposes, who do not come under the realm of the tourist policy, along with the real tourists.

In the case of domestic tourists, majority are from within Kerala and most came for personal or professional reasons. This means that the earnings claimed to have been obtained from domestic tourists are mostly those obtained from the spending on goods and services by travellers within Kerala for official or educational purposes. The total revenue generated includes the earnings from both foreign and domestic tourists. Thus, the economic effects of tourism as claimed by the tourism department in terms of the revenue generated, which includes all travel-related earnings and not exclusively tourist spending, are exaggerated.

The employment figures also depend on the all-inclusive definition of tourists and inflated statistics, which include travellers who are not exclusively tourists. Tourists form only a small portion of the customers in many industries in the economy directly supplying to tourists. The hospitality industry contributes to the bulk of direct employment in the sector, as per the continuous surveys of the Department of Tourism and as shown by studies^{lv}. It thus includes almost all employment in the hospitality sector - restaurants, food outlets, bars, clubs etc. Those employed in other tourism services like tour operators, travel industry and guides, houseboat staff, tourism media and government staff will add to the direct employment^{lvi}.

The indirect and induced employment generating segments are fast food and beverage counters/shops, commercial establishments/shops (prominent being jewellery, textiles, souvenirs, daily use products, etc), travel insurance, amusement parks, local transportation, travel and hospitality studies, currency exchange, media and other entertainment products and services^{lvii}. Moreover, public transport vehicles, taxis, auto rickshaws and shops cater mostly to the local population. The extent of usage of many indirect employment-creating sectors by tourists would be minuscule, compared to their usage by the local population. Considering this aspect, the value of estimated employment generated by tourism in these sectors is not reliable.

It can be concluded that the claim that the tourism sector is an engine of growth and employment generation in Kerala is based on questionable and unreliable statistics. A larger than the actual share accruing from tourism to the local economy is projected based on the definition of tourists, which includes all travellers and not exclusively tourists. Tourism earnings, revenue and employment are based on these inflated figures.

3.4. Tourism and Construction Activities

Widespread construction activities were promoted through government intervention in the name of tourism. There has been indirect support from the state government to the real estate lobbies under the shroud of tourism projects. For example, different expert reports have revealed illegal construction and mining activities by the real estate mafia in connivance with politicians and revenue officials in the famous tourist spot of Munnar in Kerala^{lviii}. Government intervention for the sake of tourism promotion has been indirectly protecting the real estate mafia in Munnar, which is one among the main tourist attractions in Kerala. Through extensive government support for many ecotourism projects aimed at transforming the state's tourism industry, the indirect beneficiaries were the real estate lobbies in the state, as shown by many studies^{lix}.

4. Conclusion

The natural beauty, unique geographical features and equitable climate have made Kerala one among the most attractive tourist destinations in India, no thanks to the government interventions. The tourism industry in Kerala flourished, mainly due to the efforts of private investors, both small and large, who invested in the unique attractions of Kerala tourism, including houseboats and home stays. It is true that the tourism policies of the state were aimed at promoting private investors to play the major role, with the government acting as the facilitator. Though the government policies were investor friendly in paper, they were actually harming the investors rather than promoting them.

The government is playing the role of the lead provider of accommodation facilities. It is also in complete charge of tourism promotion and marketing. Though found to be highly unsuccessful and ineffective, the government has spent a significant amount of money on government-run tourism services. Kerala's international tourism sustains on visitors from a few countries while domestic tourism is dependent on tourists from within the state, despite the huge spending on tourism promotion by the government. At the same time, the potential of innovative products like home stays and houseboats is not tapped for lack of incentives to the entrepreneurs. The claims of the economic advantages of tourism are based on unreliable statistics, along with an all-inclusive definition of tourists, which do not come under the realm of the state's tourism policy.

The government needs to act as a facilitator of tourism by providing the basic infrastructure conducive for tourism and allow the private sector to play the lead role in tourism promotion and development. Government spending needs to be directed at developing basic infrastructure for tourism as such and not for general infrastructure, which comes under other departments. Tourism promotion and marketing should be the responsibility of the private sector, which will help in implementing innovative marketing methods for attracting international tourists from more countries and domestic tourists from other states. This will help in exploiting the natural potential of Kerala tourism rather than placing artificial constraints on tourism development in the state through government interventions.

There needs to be a reliable procedure for collating tourist database in the state that distinguishes tourists based on the type of visa and purpose of visit. The revenue and employment impacts of tourism need to be analysed using this database. This will provide a reliable picture of the economic effects of tourism on Kerala. Tourism policies need to be formulated and developed based on reliable statistics instead of inflated values. Periodical third party surveys need to be conducted for understanding the profiles of visitors and their spending patterns.

Appendix 1

P.I. Sheik Pareeth IAS
Director



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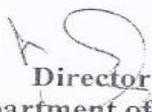
D.O. No R&S (1) 8415/2015/DOT

Dear Owner /Manager,

First of all, let us thank you and congratulate for the support, you extend to Kerala tourism ever. As you are aware, now Kerala Tourism is in the state of transformation of collection of tourist arrival statistics through online mode. We understand that the support from your part is very essential for the success of this project. We have entrusted Statistical investigators from Economics and Statistics Department to collect the tourist arrival statistics and occupancy rate of accommodation units in every month from the accommodation units on behalf of Department of Tourism.

In this regard I kindly request you to provide required information to our Investigators who will approach you with this letter. This will make the work easier to the visiting officials as well as the Department.

Correct statistics guides the path of the Department in planning & Marketing the destinations. So your support is highly important to us.


Director
Department of Tourism

Copy to:

The Deputy Directors, Economics & Statistics Department (All District) to issue the Investigators who are collecting tourist Statistics



14	Lakshadweep												
15	Madhya Pradesh												
16	Maharashtra												
17	Manipur												
18	Meghalaya												
19	Mizoram												
20	Nagaland												
21	Orissa												
22	Pondicherry												
23	Punjab												
24	Rajasthan												
25	Sikkim												
26	Tamil Nadu												
27	Tripura												
28	Uttar Pradesh												
29	West Bengal												
30	Others (mention the place)												
31													
32													
33													
34													
35	Total												

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