

Homestays and Kerala Abkari Policy 2023-24

Policy Brief

Centre for Public Policy Research





Authors

Anu Maria Francis, Senior Associate, Research and Project Management, CPPR

Anagha S, Research Intern, CPPR

Nandana, Research Intern, CPPR

Guided By

Nissy Solomon, Hon. Trustee (Research & Programs), CPPR

Dr D Dhanuraj, Chairman, CPPR

Layout and Design

Anu Maria Francis, Senior Associate, Research and Project Management, CPPR

Proofread by

April Suzanna Varkey, Senior Associate, Communications & Events, CPPR

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Centre for Public Policy Research (CPPR)

First Floor, Mandoli House, New Link Road

Elamkulam, Kochi, Kerala, India-682020

www.cppr.in | E-mail: research@cppr.in

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Table of Contents

1.Context of the Study.....	05
2. Including Toddy in Homestay Offerings: A Case for Consideration.....	07
3. Policy Recommendations	10
4. Conclusion.....	13





1. Context of the Study

Kerala ranks among the top 10 states in India, accounting for 4.02% of foreign tourist arrivals nationwide (Tourism Statistics 2022, Govt. of India). Tourism has been a significant contributor to Kerala's economy for decades, generating revenue of Rs. 35,168.42 crore for the sector in 2022 (Kerala Economic Review, 2023). In 2022, both foreign and domestic tourist arrivals experienced significant growth. The annual growth rate of foreign tourist arrivals in Kerala surged by 471.28%, while India witnessed a growth of 714.26%, with Kerala making a substantial contribution to the country's overall growth. This trend is visually depicted in Graph 1. Similarly, the annual growth rate of domestic tourist arrivals in Kerala skyrocketed from 7.75% in 2013 to an impressive 150.31% in 2022, as illustrated in Graph 2. This surge in tourist numbers indicates a heightened demand for food and accommodation units.

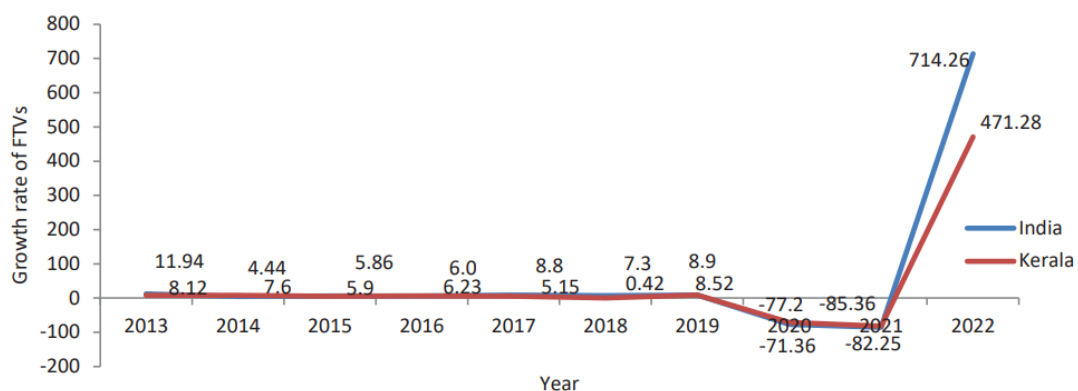
The hospitality sector in Kerala has played a significant role in accommodating the surge in tourism and related developments.

The state boasts a well-established hospitality ecosystem, comprising hotels, resorts, homestays, grihastali, ayurveda centres, and more, offering various types of accommodation and tourist experiences.

According to the Kerala Economic Review, the state has a total of 8,036 tourist accommodation units, providing 108,656 rooms (refer to Table 1). Among these options, homestays stand out for their unique and experiential tourism offerings. They allow tourists to stay in private residences and immerse themselves in the host's culture, cuisine, and way of life. Guests get to experience indigenous products, cuisine, beverages, festivals, and picturesque landscapes of their place of residence. Homestays rank as the third-highest provider of tourist accommodation rooms in the state, with hotels and resorts occupying the first and second positions.

Graph 1: Annual Growth Rate of arrival of foreign tourists in Kerala and India

Figure 5.3.1 Annual growth rates of the visits of foreign tourists in India and Kerala from 2013 to 2022, in per cent



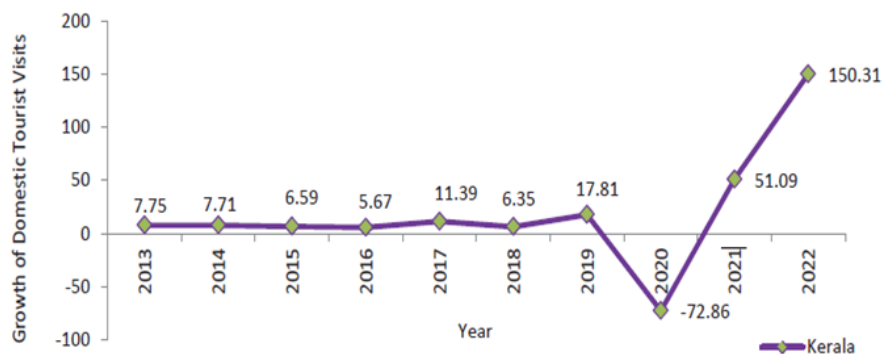
Source: Kerala Economic Review 2023





Graph 2: Annual Growth Rate of arrival of domestic tourists in Kerala and India

Figure 5.3.4 Annual growth rates in the arrival of domestic tourists in Kerala from 2013 to 2022, in per cent



Source: Department of Tourism, Government of Kerala

Source: Kerala Economic Review 2023

Table 1: Number of Accommodation Units in Kerala

District	Ayurvedic centres	No. of Rooms	House boats	No. of Rooms	Hotels/Others	No. of Rooms	Home stays	No. of Rooms	Grihasthali	No. of Rooms	Rest House	No. of Rooms	Guest House	No. of Rooms	Yathri Nivas	No. of Rooms	Resorts	No. of Rooms	Serviced Villa	No. of Rooms	Total Accommodation Units	Total No. of Rooms
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Thiruvananthapuram	39	525	0		679	12131	152	770	0		9	66	18	234	3	34	218	3838	17	192	1135	17790
Kollam	11	139	9	12	218	3516	40	158	0		9	65	5	49	0		19	209	7	25	318	4173
Pathanamthitta	23	207	0		86	1445	27	89	0		12	534	7	111	2	27	0		2	9	159	2422
Alappuzha	11	133	37	0	176	1633	221	448	0		7	62	4	38	0		52	407	11	28	519	2749
Kottayam	10	54	3	4	138	2214	50	181	2	10	9	62	12	173	0		30	696	5	13	259	3407
Idukki	5	60	0		588	7482	513	2080	0		7	21	12	111	1	14	309	5349	122	769	1557	15886
Ernakulam	5	30	0		867	19239	228	1059	2	16	80	1218	9	129	2	20	56	612	28	172	1277	22495
Thrissur	33	451	0		407	8182	18	77	0		16	236	12	339	1	1	35	508	5	17	527	9811
Palakkad	18	332	0		234	3908	4	18	0		19	106	4	28	0		6	67	1	0	286	4459
Malappuram	7	314	0		295	3497	7	16	0		18	299	2	10	0		22	218	0		351	4354
Kozhikode	3	36	0		226	5405	9	44	0		10	73	8	86	0		13	135	2	7	271	5786
Wayanad	9	86	0		238	2936	299	1139	0		17	137	10	52	2	13	175	2324	95	408	845	7095
Kannur	15	226	0		269	5188	61	231	0		15	109	8	52	0		26	260	16	75	410	6141
Kasaragod	9	142	1	7	70	1638	21	83	0		7	60	2	35	0		9	109	3	14	122	2088
TOTAL	198	2735	50	23	4491	78414	1650	6393	4	26	235	3048	113	1447	11	109	970	14732	314	1729	8036	108656

Source: Department of Tourism, Government of Kerala

Source: Kerala Economic Review 2023





Homestays, especially those located in rural areas, are actively endorsed by government organisations through initiatives like the Responsible Tourism Project and Green Tourism initiatives, as they are recognised as top travel destinations. Homestays significantly contribute to the state's tourism revenue, both directly and indirectly, by offering distinct facilities and services compared to traditional hotels and resorts. Hotels with a rating of 3 stars or higher are permitted to serve any type of alcoholic beverage, including wine, beer, and the local Kerala drink called "toddy." However, homestays are not allowed to serve any alcoholic options, even those with a lower alcohol content.

Toddy, an indigenous beverage of Kerala, is extracted from the sap of coconut, palmyra, and choondapana trees, which are abundant in the region.

As part of their experiential tourism initiative, homestays showcase the toddy extraction process to their guests, but they are not legally permitted to offer toddy to their guests. This creates a disparity between the concepts of experiential tourism and homestays.

This study seeks to

1. explore the rationale behind categorising homestays separately and the unique treatment of this form of accommodation within the tourism industry, and
2. examine the potential impacts of relaxing existing regulatory constraints to permit homestays to offer toddy to guests.





2. Including Toddy in Homestay Offerings: A case for consideration

1. **Tourism Narrative** : Some studies suggest that a contributing factor to Kerala's status as a premier tourist destination in India is the promotion of rural products and cuisine. Rural tourism is identified as having significant potential, with tourists expressing a keen interest in experiencing Kerala's rural life and traditional toddy culture, particularly as urbanization progresses. The authors argue that while Toddy has the potential to appeal to both domestic and foreign tourists, it remains under-promoted in the tourism sector (Gupta, P., & D. M., 2018). Even the K P Udayabhanu Commission appointed by the Kerala government in 1987 also recommended modernisation to promote toddy and toddy shops.

Santhosh George Kulangara, Member, Kerala State Planning Commission, explained that

"To ensure the integrity of toddy, all individuals should be permitted to produce it. It is unlikely that any entrepreneur in the tourism sector would serve substandard food or beverages to their guests. It is crucial to recognize that if any foreign tourist shares negative experiences of consuming adulterated toddy, it could tarnish the reputation of the entire country.


Tourists typically seek to experience local beverages rather than solely aiming to become intoxicated. For instance, Ethiopia offers a wine known as Tej, which is served alongside music and dance in culturally significant buildings. Conversely, the serving of liquor in Kerala often occurs in unhygienic conditions. This raises concerns regarding human rights for consumers in Kerala,"

In Sri Lanka, the policies support issuing licenses for soft liquor like toddy locally known as "Raa" in tourist establishments approved by Sri Lanka Tourism Development Authority (SLTDA) thereby encouraging the tourist experience (The Morning, 2022). Kerala, a state that has a major tourism revenue w.r.t to SGDP must have policies to promote the toddy industry at large.

In the Supreme Court case filed by Kerala Toddy Shop Licensee Association in 2017, deliberating whether toddy should be classified as liquor and whether toddy shops selling the beverage should be subject to the nationwide ban on alcohol sales within 500 metres of national and state highways, the Kerala government argued that toddy is a "very mild alcoholic beverage" abundant in vitamins and integral to traditional cuisine. It also referred to the Kerala Excise Manual, which highlights toddy's purported benefits, claiming it enhances blood quality and provides essential vitamins for organs, nerves, and tissues (Rajagopal, 2018). A drink that the state itself identifies as a mild alcoholic beverage that is good for health, the restrictive licensing system acts contradictory to the intention of promoting the product in the larger market.

As part of the Kerala Responsible Tourism Mission, Rural homestays are promoted with the aim of providing additional income to a family using their own houses. Largely, the mission aims to utilize tourism as a means for advancing the development of village and local





communities, alleviating poverty, and prioritizing women's empowerment, with the goal of offering supplementary income, and improved livelihoods to farmers, traditional artisans, and marginalised individuals, while also fostering social and environmental balance. To encourage rural homestays, showcasing the toddy tapping process to guests, particularly foreign tourists, is permitted.

The existing efforts of the Tourism Department to promote homestays can be reinforced by promoting toddy as a heritage drink of Kerala, especially homestays being an integral part of rural tourism. This will also guarantee that guests have access to freshly tapped toddy, ensuring its quality, which may not be the case when serving toddy purchased from toddy shops.

“We would like to serve toddy to the guests on demand by tapping the trees on our premises to ensure fresh, unadulterated toddy. To regulate the sector, the number of trees to be tapped and the quantity of toddy that may be tapped on a daily basis for the purpose may be fixed and marked.”- A homestay owner in Muvattupuzha (Ernakulam District)

Homestay owners who felt that toddy regulations for homestays could be relaxed mentioned that toddy is of low alcoholic content and being able to serve it to guests would generate additional income for them. They also felt current regulations with regard to liquor could also be relaxed for homestays where they could be permitted to serve liquor that is low in alcoholic content, such as beer.

Overall, the relaxation of toddy regulations for homestays would benefit homestays located in areas with coconut trees and based on their ease of access to toddy tappers.

2. Employment Narrative :

According to reports, the number of individuals registered with the Kerala Toddy Workers Welfare Fund Board has decreased significantly from nearly 30,000 in 2014 (comprising 24,794 toddy tappers and another 8,975 working in toddy shops) to below 15,000 (Arun, 2023). Factors contributing to this decline include the profession's negative reputation, the unhygienic conditions of toddy shops, and the less popular and restrictive policies surrounding the sale of toddy and value-added products. Expanding the toddy market to homestays presents an opportunity for tappers to increase the sources of their income through tapping fees and receive tipping fees from tourists. Specifically, the Abkari Policy 2023-24 aims to bring in more youth participation in the sector, both via entrepreneurship and job creation. A relaxation of the laws in homestays to serve soft liquor having less than 10 percent alcohol content, like toddy, beer and wine, can thus help more youth employment in the sector.

3. Economic Narrative:

In Kerala, there are approximately 278,000 coconut trees tapped, alongside 2,100 toddy palms and 23,690 elephant palms (Mathrubhumi, July 2023). Despite its reputation for coconut tree plantations, both the state of coconut farmers and the toddy ecosystem are currently facing challenges. etc could potentially provide additional income for coconut farmers.



Kerala, whose name originates from the coconut ("keram"), boasts 765.44 lakh hectares of coconut farming, as estimated by the Coconut Development Board in 2022. Given that toddy is a valuable byproduct of coconut farming, promoting the product by increasing its market access through homestays, hotels Compounding this issue is the scarcity of coconut trees, exacerbated by various diseases that weaken them, leading to a decline in toddy production. A trace of toddy sources in Kerala reveals that toddy shops often serve toddy from Palakkad. Beyond the challenges in policy implementation, the toddy tappers of the Njarakkal region highlight a critical concern that the positive impact the policy might bring to tappers may not align with the stark reality. The dwindling number of toddy tappers in Kerala, coupled with the replacement of local tappers by migrant workers, underscores the complexity of the issue. For instance, in the Cherai-Vypin area, specifically Njarakkal, a renowned tourist destination with homestays and resorts, there are a mere eight toddy tappers in total.

The limited availability of toddy in the state and the overreliance of toddy on Palakkad district alone, reinforce the case for relaxing regulations for homestays.

Out of 5,130 toddy shops in operation, only approximately 3,560 are currently open due to regulatory constraints (Das, 2020). Rules regarding the placement of toddy shops, which mandate a minimum distance of 400 metres from educational and religious institutions, burial grounds, etc., further affect their distribution.

Allowing homestays to tap toddy from trees on their premises can ensure the availability of fresh toddy for guests, even in areas where toddy shops are unavailable. The homestay can thus gain more income by providing authentic and fresh toddy along with the food served.





3. Policy Recommendations

The legal provisions affecting homestays and toddy are currently not in intersection in any manner. The interplay between homestays and toddy comes only as part of the demonstration of toddy tapping being promoted as a tourist attraction for the homestay guest experience. Hence, the relaxation of the toddy regulations for homestays in Kerala and serving them to homestay guests requires a deeper analysis.

The possible policy options for allowing homestays to serve toddy include:

- A. Delicensing of toddy
- B. Bringing Homestay in the same Licensing System
- C. Legalising homestays to buy liquor from toddy tappers or toddy shops.

A. Delicensing of Toddy

Delicensing of toddy is the ideal course of action for all hospitality establishments, including Homestays, Resorts and Hotels. The rationale for declicensing is many. Primarily, Delicensing allows for greater flexibility and adaptability to changing market conditions. Removing licensing requirements can enable owners to adjust their operations more easily in response to fluctuations in demand for toddy or changes in consumer preferences. This flexibility is essential for the long-term sustainability of homestay businesses.

Licensing requirements often entail financial and bureaucratic burdens that deter individuals from starting businesses. By removing these requirements, more people are likely to engage in the homestay business, particularly in rural areas where coconut cultivation is prevalent, thus fostering economic growth and development. Delicensing would foster innovation by eliminating regulatory barriers that may stifle creativity and experimentation. With fewer constraints, business owners, particularly homestay owners, are free to explore new ideas, business models, and revenue streams, potentially leading to the development of innovative products and experiences that enhance the overall attractiveness of homestay tourism. Additionally, delicensing reduces the administrative burden on both businesses and government agencies. Licensing processes can be time-consuming, complex, and costly. By streamlining regulatory procedures, resources can be allocated more efficiently, benefiting both the homestay industry and regulatory authorities.

When homestays are allowed to serve toddy without licencing, they are allowed to tap the coconut trees on their premises and serve toddy to their guests. As there is no licensing involved, the number of trees to be tapped and the amount of toddy tapped can be decided by them according to the requirements of guests. This provides additional revenue to homestay owners, job opportunities for skilled workers involved in tapping and alternative income from coconut trees by selling excess toddy to others.





Some potential impacts are :

1. Usage of the excess toddy: this may be sold to nearby toddy shops or other homestay owners who do not have coconut trees nearby. The tapped toddy, if not served to guests, can be used for preparing food dishes as well. Delicensing will ensure innovation to bring value added products from the excess toddy.
2. Attracting youth employment : Toddy tapping requires skilled workers. Delicensing will help the sector expand, thereby changing the social stature of toddy tapper job, thus attracting more youth to toddy tapping and toddy industry as entrepreneurs.

Delicensing of toddy is the best option ahead. Delicensing will ensure that all stakeholders in the tourism sector can equally access and serve toddy to their guests. Delicensing can bring down the supply demand mismatch as well as attract more entrepreneurship and innovation in the toddy sector.

B. Bringing Homestay in the same Licensing System

Rules could be implemented to establish a licensing system that mirrors the one used in hotels and resorts. The number of trees needed to be tapped for serving guests can be determined based on the proportion of guests that can be accommodated in the homestay. An additional licensing form can be introduced, which can be submitted together with the homestay categorization application, along with an annual fee, in order to obtain permission. This licensed homestay can have coconut trees on its premises, which are marked by excise officials and subject to the existing Tree Tax Rules.

The licence must be annually renewed. The licence form may contain the subsequent particulars.

- I. Number of marked trees and tree tax receipts.
- II. The geographical position and limits of authorised establishments.
- III. The geographical coordinates and demarcations of the room utilized for the dispensation and storage of toddy.
- IV. The name of the individual who is employed as a Toddy Tapper

The following are the potential challenges in this arrangement;

1. The process of Tree tapping for producing toddy is a daily activity to be carried out irrespective of the demand for toddy required. This regular and consistent routine is crucial for achieving an optimal yield. If the homestay has no guests during a certain period of time or a day, tapping the toddy is a challenge as the toddy cannot be used after 24 hours. As well, the toddy cannot be converted to vinegar or any other value added product under existing rules and regulations. Thus, the homestay owner will be at a financial loss due to two reasons
 - I. payment to toddy tapper
 - II. unsold toddy
2. As the number of trees to be tapped is fixed in the license, the additional income that can be generated from tapping more trees is limited to payment per tree from the toddy shops, if the tree is licensed by a nearby toddy shop.





C. Legalising homestays to buy liquor from toddy tappers or toddy shops.

The homestays have to be allowed to buy toddy from toddy tappers or toddy shops in the locality according to the requirements of the guests. In this system, there is no separate licence to be issued to the homestays. In order to allow toddy shops to sell toddy to homestays, an additional provision has to be inserted in the Abkari Shops Disposal Rules 2002, allowing toddy shops to sell bottled toddy to classified homestays in their locality based on requirements. Similarly, Section 40¹ of Tree Tax Rules has to be amended accordingly to allow homestays to procure freshly tapped toddy from toddy tappers. To avoid contradictions with the existing norms of the minimum quantity of toddy in possession by a person without a license being 1.5 litres, the new provision can have a “non-obstante clause”.²

This system will help the toddy shops, toddy tappers and homestays gain additional income.

Way Forward

Delicensing is the best policy option to revive the toddy sector in Kerala. However, considering the present legal environment and the larger objective of promoting tourism opportunities by promoting toddy among multiple players in the tourism industry, including homestays, the third option would be the way forward.

An incremental approach towards delicensing can be ensured by allowing homestay owners to buy toddy from tappers and serve it to their customers. A gradual change in public opinion towards Toddy and the individuals working in the sector can shift the “overton window” favourable for delicensing the sector altogether.

Hence, without introducing a new licensing regime, the existing toddy shops and toddy tappers must be allowed to sell the toddy to homestay owners. The option will open up a new market for toddy shops and toddy tappers, thereby increasing their income. The homestay owners can serve toddy to their guests and gain more income. The tappers also receive more opportunities, thus supporting their livelihood. The change in policy can, in the long run, attract more skilled workers to toddy tapping as well as encourage overall toddy production in the state.

¹Section 40 prohibits tree foot sales by toddy tappers in any place other than licensed premises and he is bound to immediately transport toddy to licensed toddy shop or to a bakery based on transport permit issued to him.

²This clause is used to clarify the intention of the legislature in cases where two provisions appear contradictory.





4. Conclusion

Homestays, being the third largest provider of tourist accommodation in Kerala and supporting rural livelihoods by generating additional household income, need policy interventions. The interventions must act as catalysts to increase the tourism footprint as well as improve the livelihood of toddy tappers, homestays and coconut farmers. A liberalised approach can introduce new ideas and methods to revive the toddy industry, which is currently suffering from problems related to unsanitary and unhygienic serving conditions. Instead of implementing a stringent licencing procedure, adopting a minimal regulatory approach would be more effective in encouraging the participation of homestays and hotels in utilising the new policy.

Moreover, expanding the scope of toddy service to include homestays and hotels has the potential to enhance the social standing of toddy tappers, who frequently change occupations due to the negative social perception associated with their job. A win- win can thus be achieved by liberalising the abkari policy by legalising homestays to serve toddy on their premises.





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First Floor, 'Mandoli House, New Link Rd, opp. Metro Pillar

821, Kochi, Kerala 682020

Mob : [09745709174](tel:09745709174)

Email : research@cppr.in

www.cppr.in

