

“ATITHI DEVO BHAVA” – AN ANALYSIS OF TREND AND PATTERN OF FOREIGN TOURIST ARRIVAL IN KERALA

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ABSTRACT

Tourism is a thriving sector in Kerala's economy, as it generates income, creates employment, supports infrastructure development, and promotes balanced and sustainable regional growth. Kerala with its enchanting natural beauty, cultural diversity, and Ayurvedic tradition attracts tourists from all over the world. An analysis of secondary data on foreign tourist arrival in Kerala for the period of 2005 to 2015 reveals that there is a continuous increase in foreign exchange earnings in the state during the period under study. However, the seasonality of tourism, destination preference, and source market for tourism show more or less uniform pattern throughout the period. To attract more and more foreign tourists to the state and to reap the diverse economic and social benefits of tourism, in the highly global competitiveness, the tourism sector should adopt more innovative and unique tourism strategies by synchronising the potential with the active involvement of all stakeholders in the tourism industry.

Keywords: Tourism, Foreign Tourist, Foreign Exchange, Tourism Seasonality, Destination Preference, Source Market.

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INTRODUCTION

Tourism has emerged as one of the thriving and competitive industries worldwide. It has become a significant contributor to the economy of both developed and developing countries by supporting the workforce through creating productive and inclusive jobs and income and promoting economic, social, and political development in the region (Mishra et al. 2011; Pleumarom, 2012). The industry also generates various multiplier and secondary impacts associated with the tourism supply chain. Tourism not only contributes positively to the economic development of a country but is also an important medium for International socio-cultural linkages. Today, the revolutionary changes that have been occurring in the fields of science and technology, transportation, and communication have contributed immensely to the development of the tourism industry globally (Raina, A. K., & Agarwal, S. K. 2004). Tourism has become the fashion of modern societies whether it is for recreation, leisure, religious, family, or business purposes. As Tourism has been playing a pivotal role in the socio-economic spectrum, most of the nations are trying their best to strengthen economic life by encouraging tourism in the country.

With the advent of globalisation, the tourism industry has become an integral part of the international trade and exchange system (Padmasree, K., & Anchula, 2011). As compared to the export of manufactured goods, tourism is the most convenient way of earning foreign exchange. With the liberalisation of the economies, many countries made drastic changes in their economic policies to attract foreign investors. Indian economy after the 1990s has attracted a large amount of foreign direct investment which could make a significant impact on economic development in general and the tourism sector in particular by improving infrastructure facilities like international airports, highways, hotels, and modern technologies which are the keystones to tourism development (Selvanathan et al, 2012).

The travel and tourism sector occupies strategic importance in the Indian economy. The tourism potential of India is vast and it attracts a large number of international tourists with its rich cultural heritage and diverse natural landscapes and is home to many. As per the Report of the World Economic Forum's Travel and Tourism Competitiveness (2013), India ranks 11th in the Asia Pacific region and 65th globally out of 140 countries on the Travel and Tourism Competitiveness Index. The contribution of the travel and tourism industry to India's GDP has been increasing steadily over the years and it contributed \$ 201.43 billion to India's GDP in the year 2015 and contributed foreign exchange worth 21.1 billion U.S. dollars during the same period (Statista 2015). There has been a steady increase in foreign exchange earnings from travel and tourism in India from 2002 to 2015 except for a slight reduction in the year 2009 due to the global economic recession.

Kerala boasts a variety of natural tourist attractions, such as beaches, hills, backwaters, national parks, and wildlife sanctuaries. It has earned the reputation of being the most popular tourist destination in India, with its catchy slogan 'God's Own Country'. It is also one of the top tourist spots in South Asia. Kerala offers a rich and diverse experience to visitors, from the ancient healing system of Ayurveda to the unique boat races -the world's largest team sport. The state is also a land of many vibrant and exotic festivals. Some of the state's most famous attractions are the beaches like Kovalam, Varkala, Marari, Cherayi, Kannur, and Bakal. The backwater destinations like Kumarakom, Alappuzha, Kollam, Kochi, and Kozhikode, and the hill stations like Ponmudi, Munnar, Wayanad, and Wagamon added to the tourism market in Kerala. Kerala also has several renowned wildlife reserves, such as the Periyar Wildlife Sanctuary, Eravikulam National Park, Thattekkady Bird Sanctuary, and Parambikulam Wildlife Sanctuary. Department of Tourism plays a major role in the initiation of various projects for the development of basic infrastructure in tourist destinations and improvement of tourism attractions at the destinations and to unleash the potential.

Kerala Tourism Development Corporation and District Tourism Promotion Council conduct and facilitate tourism activities in the state by creating a favourable tourism environment with the help of various stakeholders.

Kerala with its enchanting natural beauty, cultural diversity, and ayurvedic treatments attracts tourists from all over the world. The number of foreign tourists who visited Kerala in 2014 was 9,23,366, which was an increase of 7.71% from the previous year. The top five countries of origin for foreign tourists were the USA, UK, France, Germany, and Russia. The total revenue generated by tourism in Kerala in 2014 was Rs. 24,885.44 crores, of which Rs. 6,398.93 crores came from foreign tourists (Tourism Statistics, 2014). In Kerala, the total revenue (including direct and indirect means) generated from tourism during the year 2015 was 26,689.63 crores (Economic Review 2016), with an increase of 7.25 percent over the previous year. Tourism was an important contributor to the growth of the service sector in Kerala in terms of GDP and employment generation. In light of this, the present study attempts to analyse the status of foreign tourists' arrival in Kerala.

REVIEW OF LITERATURE

The tourism industry is growing fast Worldwide spurred on by rising disposable incomes, advancements in transport and communication, and the emergence of new source markets and related infrastructure growth. All countries, regardless of their economic position can share the growth of the global tourism trade (Choudhry, S. A., & Lew, B. 2013). Seasonality is a fundamental factor that determines the demand for tourism and it created a temporal imbalance in the phenomenon of tourism. Dhakal, B. (2013), analysed the pattern of seasonal variation of tourist arrival in Nepal at different times on a monthly and quarterly basis and found that the seasonal variation is maximum in autumn and minimum in summer. Dixit, S. (2014), also found that there is a significant difference in tourist arrivals in different months, and in India tourists' arrival peaks from October to March and leans from April to September.

Selvanathan et al, (2012) investigated the causal relationship between foreign direct investment (FDI) and the number of foreign tourist arrivals in India and found that FDI has a causal effect on the number of foreign tourist arrivals. The study also suggests that to cater to the increasing demand for tourism in India, appropriate policy to explore tourism resources and plans to develop new tourist venues and facilities may need to be considered and tourism sector needs investment in many forms and FDI is one such source. Bhattacharya, K. (2011), analysed foreign tourist arrival in India based on rules of thumb and concluded that foreign tourist arrival in India displayed a regularity that did not change substantially even in the face of major global or local events. It suggested that rules of thumb can play an important role in forecasting foreign tourist arrival in India. Crouch (1992) viewed the exchange rate as a key determinant of foreign tourist inflows and foreign exchange earnings. Tourists do consider the exchange rate of a country before planning their tourism destinations because an unfavourable exchange rate will cause a hike in the cost of travel and therefore, they prefer a steady and less volatile exchange rate.

Dritsakis (2004) analysed the impact of tourism on GDP growth in Greece and found that there is a mutual interlinkage between tourism and the growth of GDP in the country. The growth and development of tourism has increased the GDP of the country significantly. Similarly, GDP growth has helped to improve the tourism sector by providing the basic infrastructure. Motiram (2007) observed that the tourism industry in India has created more employment opportunities and foreign exchange earnings due to mass tourism with globalisation. It has also brought about many positive changes in the tourism-related industry and helped in regional development. Seetanah (2011) examined the dynamic economic impact of tourism on Island economies and found that tourism development on Island economies may have relatively higher growth effects.

The study also suggests that the collaboration of governments with national tourism industry actors at large to support tourism development strategies is required and the policymakers should implement suitable tourism policies for the sustained growth of the tourism industry and economic enlargement of the country. Massidda and Mattana (2012) analyze the relationship between international tourist arrivals, GDP, and trade in Italy and concluded that tourism and trade variables react very fast to real GDP shocks but a much longer time lapse is required for real GDP to stabilize after a shock in the tourism and trade variables.

Tourist satisfaction is an important factor that determines the arrival and frequency of visit to a particular tourist destination. Gopinath, R. (2004), made study based on the international tourists' satisfaction with regard to the houseboat concept in Kerala found that except for gender, all variables like age, income level, nationality and length of stay were found to have differences with the level of satisfaction among international tourists. Poudel, A., & Phuyal, R. K. (2016), found that there exists a significant relationship between prime motivation, purpose of visit, preferred destination, and overall satisfaction of the trip whereas an insignificant relationship exists between per person expenditure, frequency of travel and satisfaction. Similarly, the hospitality of local people and natural beauty has got high satisfaction in terms of destination attributes but transport services, accessible facilities for people with special needs, cost of transportation services and availability of proper information about local places have got low satisfaction.

OBJECTIVES OF THE STUDY

1. To evaluate the trend of foreign tourists' arrival in Kerala
2. To analyse the pattern of seasonality and destination preference of foreign tourist arrival in Kerala

Data Source and Methodology

The study was based on secondary data collected from the Department of Tourism, Government of Kerala from 2005 to 2015. The study also depended on the tourism data from various issues of Economic Review published by the State Planning Board, Government of Kerala. Simple statistical tools like percentages and graphs were used for the analysis of the data.

Fund Allocation and expenditure on Tourism in the State under various plan periods

Today, Tourism is a highly attractive and lucrative sector for both local and international visitors. It has a lot of untapped potential and can create many employment and business prospects for the young generation. From second plan period onwards the union and state government allocate funds to tourism sector for the creation and upgradation of infrastructure facilities at the destinations. However, the constraints on budgetary resources on the part of the government necessitated the private sector investment in the tourism sector for the development of infrastructure for accommodation and supporting facilities. As a part of this, the government has undertaken strategies to boost tourism, in collaboration with the private sector. Table :1 gives the details of allocation and expenditure on Tourism in the State from the second to eleventh plan periods.

Table 1: Allocation and Expenditure on Tourism in the State Plan over Various Plan Periods (in lakhs)					
Period	Total Plan Outlay	Outlay for Tourism	Percentage Share of Tourism	Actual Expenditure	Percentage of Actual expenditure
I Plan	3003	--	--	--	
II Plan	8701	13	0.15	8	61.5
III Plan	17000	50	0.29	22	44.0
Annual Plan	14254	31	0.22	19	61.3
IV Plan	25840	50	0.19	55	110.0
V Plan	56896	71	0.12	79	111.3
Annual Plan	39296	130	0.33	132.27	101.7
VI Plan	148755	672	0.45	556.8	82.9
VII Plan	221100	850	0.38	833.69	98.1
Annual Plan	144200	650	0.45	816.95	125.7
VIII Plan	687648	5301	0.77	5707.85	107.7
IX Plan	1575500	19266	1.22	17397.81	90.3
X Plan	2522643	2777	0.11	2487.68	89.6
XI Plan	4560547	48873	0.15	61774	126.4

Source: Department of Tourism, Government of Kerala

From Table 1, it is understood that even though our tourism sector has the potential to contribute a lot economically and socially to the prosperity of Kerala, the fund allocation for the tourism sector in the state in various plan periods is very meager. Except in the eighth and ninth plan period the fund allocation to tourism in the state is even below 0.50 percent of the total plan outlay. It is only in the ninth plan period the outlay for tourism exceeded one percentage (1.22 %) of the total plan outlay. However, the actual outlay in most of the plan period exceeds the plan outlay for tourism. The actual outlay exceeded a hundred percent of the plan allocation to tourism during the fourth (110%), fifth (111.3%), eighth (107 %), and eleventh (126.4%) plan periods and also during annual plan periods. This means that the tourism sector, which is a key source of income for the state, needed more fund than expected. It also suggests that the tourism sector also came across some problems or opportunities that needed more funding than planned. Therefore, the state government had to find extra funds to support it either through cooperative sector initiatives or through private participation. Figure 1 gives the trend of plan outlay and actual outlay of the state for tourism under various plan periods.

Figure 1.1 Plan outlay and actual outlay of the state for tourism under various plan periods



Source: Computed

Status of Foreign Tourists Arrival in Kerala: A decadal analysis

Many factors influence the number of tourists visiting a country. People's travel plans depend on the political, economic, and climatic situation of different countries. Government policies also impact the inflow of foreign and domestic tourists to an area. The industry can grow more with cheaper and more attractive tour packages, better branding, and updated marketing methods. The state tourism department has been using different media and strategies to market Kerala as a distinctive and appealing place for foreign visitors. The foreign tourist arrivals in India increased by 4.5 percent from 7.68 million in 2014 to 8.03 million in 2015. India had a 0.68 percent share of global tourist arrivals and was ranked 40th in the world in 2015. (Economic Review 2016). The share of Kerala state in the national pie of foreign tourist arrivals was 12.2 percent in 2015, making it the 7th highest state among the top ten (Economic Review 2015). Table: 2 gives a picture of the trend of foreign tourist visits to India for ten years from 2005 to 2015.

Table: 2 Foreign Tourists Arrival in Kerala (2005 to 2015)				
Year	India (Numbers)	Percentage Change	Kerala (Numbers)	Percentage Change
2005	39,15,324	13.2	3,46,499	0.28
2006	44,47,167	13.6	4,28,534	23.68
2007	50,81,504	14.3	5,15,808	20.37
2008	53,66,966	5.6	5,98,929	16.11
2009	51,08,579	-4	5,57,258	-6.96
2010	57,75,692	11.8	6,59,265	18.31
2011	62,90,319	8.9	7,32,985	11.18
2012	65,77,745	4.57	7,93,696	8.28
2013	69,67,601	5.9	8,58,143	8.12
2014	76,79,099	10.2	9,23,366	7.6
2015	80,27,133	4.53	9,77,479	5.86

Source: Economic Review (2010,2013,2016) Govt. of Kerala

It is observed that the trend of foreign tourist visits to India and Kerala shows a more or less similar pattern even though rate of change in number of foreign tourists visit to Kerala is more than that of India in several years under study except in the year 2005 (-6.96% in Kerala as compared to -4% in India), 2009(0.28% as compared to 13.2% in India) and 2014 (0.28% as compared to 13.2% in India). In the year 2005, both domestic and foreign tourist arrivals in the state showed a passive trend due to the bad effects of the Tsunami that hit the entire world, including Kerala and many southern states in India. If we observe the period under study, the growth in the number of foreign tourists arriving in the state was highest during 2006 (23.68%) and 2007 (20.37%). There was a negative growth rate in foreign tourists’ arrival to both India (-4.0 %) and Kerala (-6.96%) in the year 2009 due to the negative impact of the global economic recession. Foreign tourist arrival in Kerala showed a downward trend from 2008 except in the year 2010 (18.31%). The global economic slowdown, outbreak of infectious diseases like H1N1, and terrorist activities in India and abroad had a negative impact on the tourism industry in general. Also, frequent hartals and related political instability in the state may have negatively impacted foreign tourist arrival in the state. Another reason may be the lack of effective promotion and marketing of Kerala Tourism as well as the poor infrastructure and service quality in the state, for the dip in foreign tourist arrivals.

Share of Major International Source Markets of Kerala Tourism

Tourism influences the foreign exchange earnings of a country. It refers to countries or regions where travellers come from to explore other places. It covers a variety of travel motives, from leisure holidays to business trips, affecting economies through expenditure on lodging, transport, and attractions. An understanding of the source market helps to identify the traits, desires, and reasons of tourists from various places. An understanding of the Tourism Source Market will help to find out and design the current and future markets for tourism places, marketing, and promotion tactics to attract tourists by satisfying their interest. Also, Tourism policies and plans can be adjusted to the trends and changes in the tourism demand and supply.

Table: 3 Share of Major International source Markets of Kerala Tourism 2014 and 2015

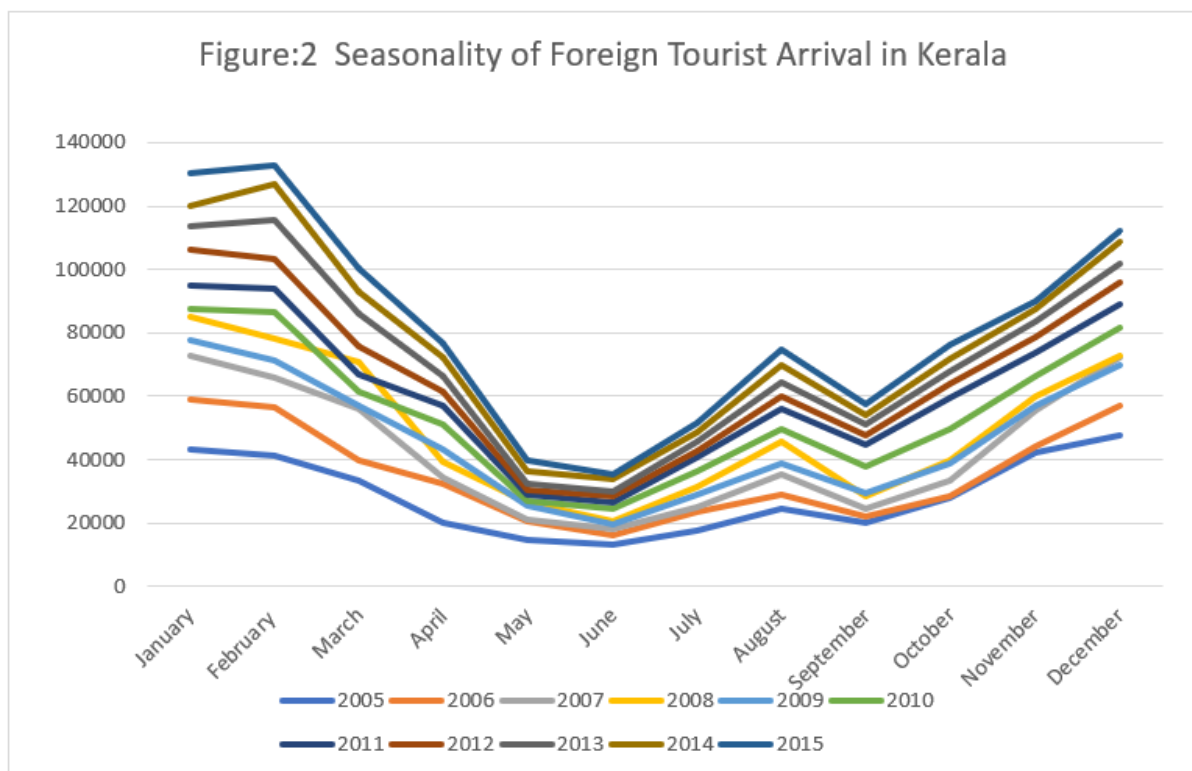
Country / Year	2014	2015
U.K	151497	166792
France	90933	91598
U.S.A	77616	75773
Germany	75698	76791
Saudi Arabia	43346	51149
Russia	35010	32725
Australia	34513	35244
Canada	25796	26216
Malaysia	25611	28047
Switzerland	25224	26115
Italy	24497	21433
Sweden	20340	20810
United Arab Emirate	18246	20507
Oman	17239	18763
Netherland	15470	22275
Others	236881	263241
Total	923366	977479

Source: Department of Tourism, Govt. of Kerala

An observation of the Share of Major International source Markets of Kerala Tourism during the years 2014 and 2015 shows that, out of 15 countries that are the major international source market for tourism in Kerala, the United Kingdom occupies the top place followed by France and the U.S.A. The data over the period under study depicts that the source market has remained largely unchanged and dominated by regions like Europe and the U.S. over the years. Therefore, marketing the State's tourism potential in fresh and untapped regions of the world is crucial to boosting tourist arrivals. New and innovative marketing methods and strategies should be discovered and developed for this.

Seasonality of Foreign Tourists Arrival in Kerala

In the current era of globalization seasonal fluctuations in tourist arrivals pose a major policy challenge for the global tourism industry, as they cause uncertainty in tourism marketing and cause ups and downs over time in tourism-specific activities including tourist arrivals, spending by tourists, visits to particular destinations (Butler, 2001). Seasonality has an impact on tourism demand and supply of tourism products and services. On the supply side, seasonality makes changes in all aspects of tourism like pricing and marketing, nature and quality of employment, cash flow, and investment in business finance and related supply chains (Baum, 1999; Baum & Lundtorp, 2001). On the demand side, seasonality in tourism causes a hike in the prices of tourism products and services, difficulty in getting quality infrastructure, and a reduction in satisfaction due to crowding (Jang, 2004). Figure: 2 shows the pattern of Tourism seasonality of foreign tourists in Kerala from January to December from 2005 to 2015.



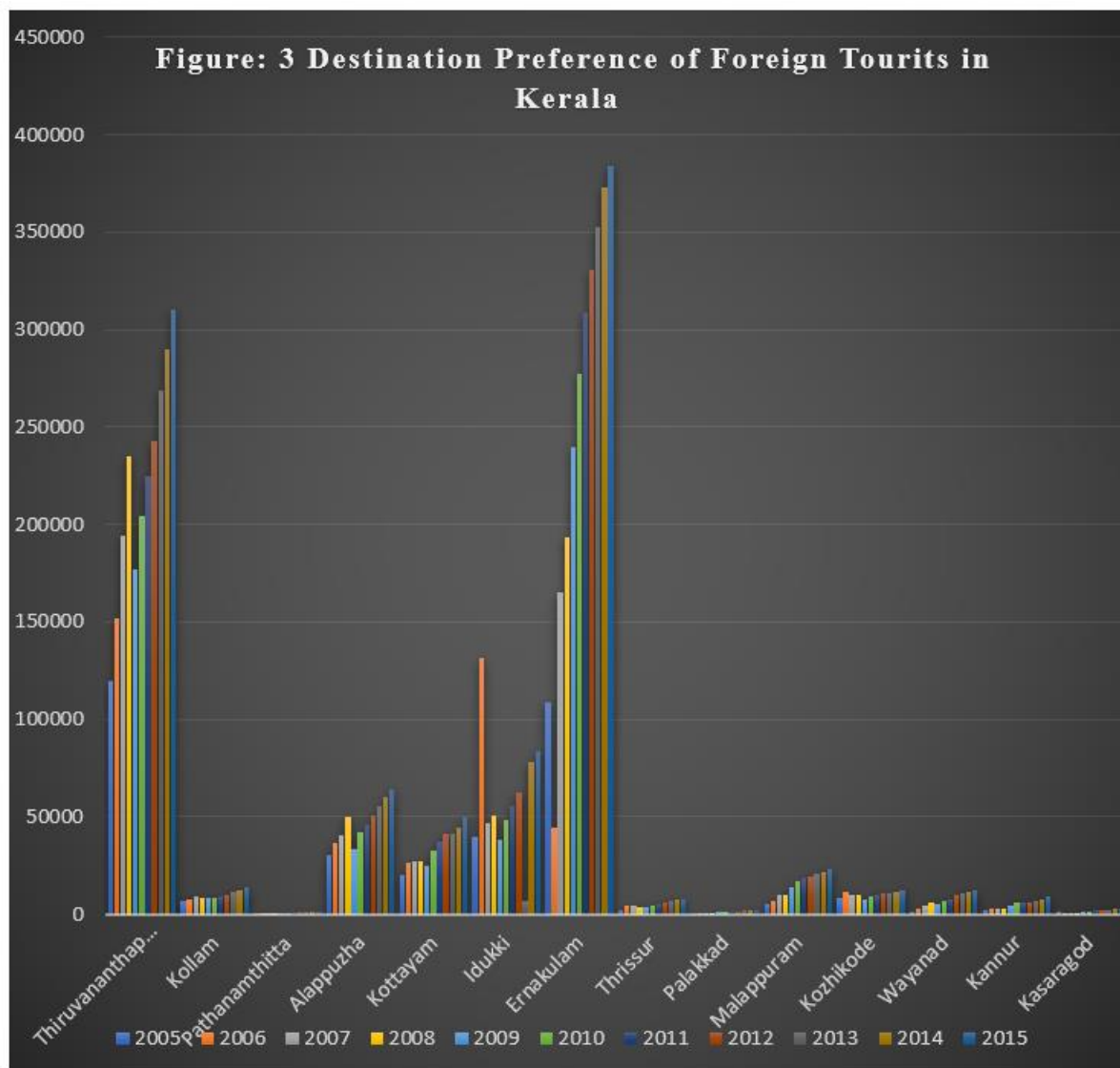
Source: Computed from the Secondary data, Dept. of Tourism Govt. of Kerala

An analysis of tourism seasonality of foreign tourists arrival in Kerala during the period under study shows that the pattern of foreign tourists visiting Kerala in different months has not changed much over these years. The foreign tourists' arrival peaks in January and February and leans in April May and June. The tourism seasonality shows an upward trend from October to December and January to February. Kerala's scenic beauty and comfortable climate are best enjoyed in the winter months of January and February when the weather is pleasant.

The places in Wayanad and Idukki are the main tourist attractions from December to February. Another reason for the increase in tourist visits during these months is that many local festivals and events, such as festivals in pilgrimage centers like temples which showcase the rich tradition and culture with folk arts take place during these months in Kerala. Monsoon tourism and Ayurvedic tourism are the main attractions of tourists from June to August.

Destination Preference of Foreign Tourists in Kerala

The ease, convenience, feasibility, and attractiveness of a destination encourage people to visit and spend time there and it determines the destination preference. Destination preference means the degree to which destinations meet the touristic expectations of their visitors in terms of dimensions like recreational opportunities, food and accommodation, cultural richness, natural beauty, and various other amenities (Pearce, 1979). Destination preference is a prime factor that influences the frequency of visits to a particular place, length of stay, and willingness to pay for tourism products and services. Figure :3 shows the district-wise destination preference of foreign tourists in Kerala.



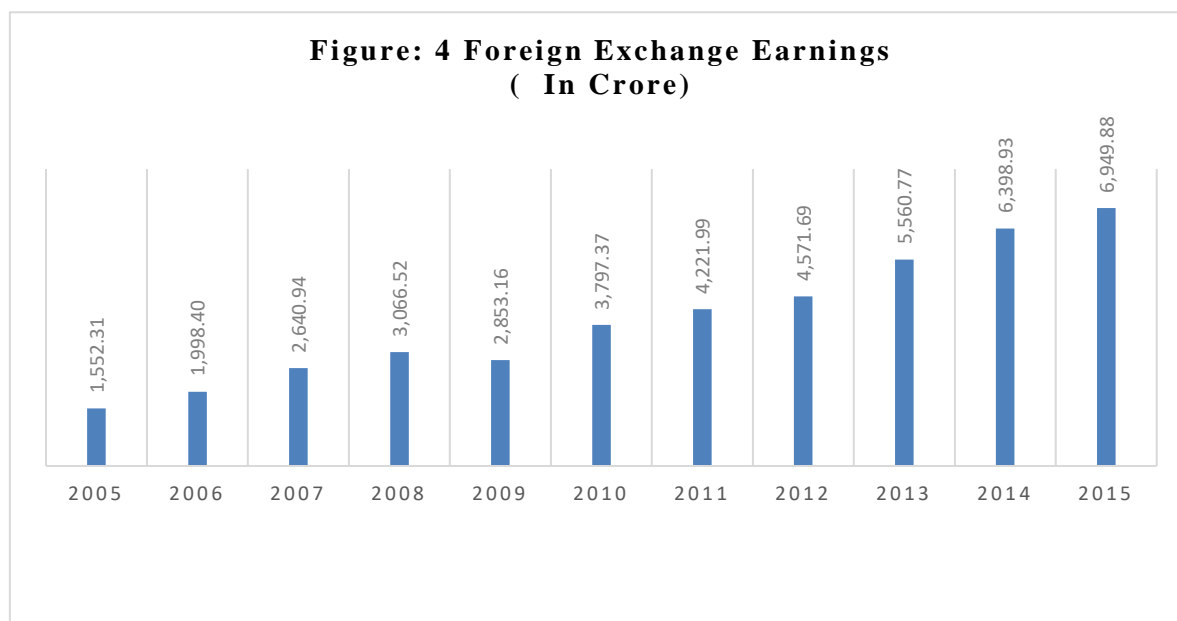
Source: Computed from the Secondary data, Dept. of Tourism Govt. of Kerala

The figure gives a clear idea of the district wise destination preference of foreign tourists in Kerala during the period under study. It shows that there is an increase in the number of foreign tourists to all districts in the state from 2005 to 2015. But the destinations that attracted the most foreign tourists are Ernakulam, Thiruvananthapuram, Idukki, Alappuzha, and Kottayam. During 2015 the highest percentage of foreign tourists visited Ernakulam (39.2%) followed by Thiruvananthapuram (31.7%), Idukki (8.6%), Alappuzha (6.5%) and Kottayam (5.1%) (Economic Review 2016).

The high preference of districts like Thiruvananthapuram is due to the cultural heritage, and diverse attractions of these places. The main attractions of Ernakulam are Mattancherry Palace, Bolgatty Palace, Hill Palace Museum, Vasco House, St Francis Church, Chinese Fishing Nets, and Fort Kochi Beach. Thiruvananthapuram also boasts of places like Padmanabhaswamy Temple, Napier Museum, Shanghumukham and Kovalam Beaches, Poovar Island, etc. The district is also known for Ayurvedic tourism. Another reason for tourist concentration in these districts may be due to the availability of advanced tourism infrastructure like international airports, national highways, and railways that has accessibility and connectivity with neighbouring states. Idukki is known for its scenic beauty and good climatic conditions and is famous for adventure tourism. Backwaters and the unique boat races that are the largest team sport in the world are the main attractions of Alappuzha.

Foreign Exchange Earnings from Tourism in Kerala

Tourism is an important source of foreign exchange earnings for many countries. Countries can enhance the trade balance, generate jobs, attract investment, and boost economic development through thriving its tourism sector. It also creates a multiplier impact on the domestic economy by encouraging investment and driving local firms toward greater efficiency due to increased competition. Kerala earns a lot of foreign currency from tourism. Figure: 4 shows the trend of foreign exchange earnings of Kerala through tourism from 2005 to 2015.



Source: Economic Review (2010 and 2016), Govt. of Kerala.

The foreign exchange earnings from tourism sector in Kerala increased from 1552.31 crores in 2005 to 6949.88 crores by 2015. Foreign exchange earnings registered a compound annual growth rate (CAGR) of 14.6 percent during this period. The total revenue (including direct and indirect means) generated from tourism during the year 2015 was 26,689.63 crores, showing an increase of 7.25 percent over 2014. Except in the year 2009, there was a steady increase in foreign exchange earnings in the country from 2005 to 2015.

CONCLUSION

The tourism industry plays a crucial role in the socio-economic and cultural development of Kerala. Yet, the state has a lot of untapped potential and opportunities that can create many employment and business prospects for the people, especially the young generation. Today the Department of Tourism is undertaking various projects for the development of basic infrastructure at tourist destinations and the improvement of tourism attractions at the destinations. However, the budgetary provision for tourism in the state is very low which necessitates alternate supporting mechanisms for the diversification and innovation of the tourism industry to make it a unique destination for both domestic and foreign tourists. The development of the medium and small-scale sector and responsible involvement of the local community will help a greater in this respect. An analysis of secondary data on foreign tourist arrival in Kerala from 2005 to 2015 reveals that there is a continuous increase in foreign exchange earnings in the county during the period under study and seasonality of tourism, destination preference, and source market for tourism shows more or less uniform pattern throughout the period. To attract more and more foreign tourists to the state and to reap diverse economic and social benefits of tourism, in the highly global competitiveness, the tourism sector should adopt more innovative and unique tourism strategies by synchronising the potential by actively involving all stakeholders in the tourism industry

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