

A STUDY ON THE TOURISM INDUSTRY OF NORTH EAST INDIA WITH REFERENCE TO ITS RECENT GROWTH AND REVENUE GENERATION

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ABSTRACT

This study is an attempt to analyse the recent growth of tourism in north eastern region of India based on secondary sources of time series data. In order to understand the variation of tourist inflow and the resultant revenue generation, a time period of 2005-06 to 2016-17 has been considered for the study. The study basically investigates the state wise trends and annual growth rate of domestic as well as foreign tourist's inflow across the eight north eastern states of India during the time period. The study also examined the growth rate of tourism revenue and its contributions to state GDPs across selected north eastern states of India. The findings of the study reveals that, States like Assam, Sikkim and Arunachal Pradesh have shown better performance in attracting more domestic as well as foreign tourists over the study period. So far as foreign tourist's inflow is concerned, Sikkim and Arunachal Pradesh have attracted maximum tourists of this category. It has found that, contribution of tourism revenue to state GDPs by north eastern states is very negligible. The study clearly reveals that, Sikkim is the topmost performer in tourism in recent years. Thus, enormous potentialities of tourism industry can become a significant sector towards economic growth of north eastern region of India. Policy makers and other stakeholders are expected to get fruitful information from this study to design suitable policies in favour expansion of this industry.

Key words: Domestic Tourist, Foreign Tourist, State GDP, Tourism revenue, Tourist Inflow

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1. INTRODUCTION

There is a popular saying in India that, a guest is equivalent to God. India as a multilingual and multicultural country had has its long history of welcoming and serving guests both from

within and outside the country. Government of India through 'Atithi Devo Bhava' campaign has given crucial importance at providing the inbound tourist a greater sense of being welcomed to the country. In the modern era of globalisation, tourism industry is considered as a rapidly growing industry in India and especially in the North Eastern states of India. Tourism refers to the short term movement of people from one place to other places of interest which gives recreation, entertainment to them. Moreover, this sector provides access to heritage, cultural and socio economic aspects of different regions of India. The North Eastern states of India comprises of eight sisters states like- Assam, Manipur, Meghalaya, Mizoram, Tripura, Arunachal Pradesh, Nagaland and Sikkim. The major tourist attraction of North Eastern states are wild life, natural beauty, waterfalls, green tea gardens, flora and fauna, historical monuments etc. In the North Eastern states, Tourism industry provides employment opportunities in the form of Hotels, Restaurants, Transportation, allied business etc. India is emerging as an attractive tourist destination in the world with a positive impact on generating employment and revenue earning opportunities [9]. Moreover, both state governments of North Eastern regions and central government are earning revenue from domestic as well as foreign tourists. Tourism as a growing industry has contributed 6.23 percent to the national Gross Domestic Product (GDP) and providing 8.78 percent of total employment [6]. India has the record of more than 5 million annual foreign tourist arrival and 562 million domestic tourist visits [1], [2]. A part from revenue earning and employment opportunities, tourism sector also enhancing economic growth by contributing to Gross Domestic Products of North Eastern states. Spreading nationalism, brotherhood, peace and harmony are also results from tourism.

Tourism has been emerged as an important sector in the North Eastern region due to its physical and geographical variety of human resources [5] and there is a need of adoption of sustainable tourism development strategy [3]. Six to seven percent of tourists from Britain and Australia visit north-eastern tourist spots for nostalgic attraction [5]. Tourism has been a major source of revenue generation and economic growth of North Eastern (N.E) region [12]. However, there is a wide variation in the number of tourist inflow into the north eastern states [14] and the potential area for investment in the N.E region is the tourism and hospitality sector [7]. Different types of tourism exists in N. E region which are-adventure tourism, co-tourism, business tourism etc [20]. Given the scope to earn foreign exchange from foreign tourism the four most important states which have experienced 61.8 percent of foreign tourist arrival are Maharashtra, Tamil Nadu, Delhi and Uttar Pradesh [8]. Healthy economic growth and rising level of income is a key point of growth of tourism industry [17]. Tourism has positive impact on Indian economy and it is the second largest foreign exchange earner in India [18], [19]. Besides the conventional types of tourism, agricultural tourism has been emerged as a new type of tourism throughout the whole India [15], [10]. Tourism industry has strong relevance to economic development, cultural growth and national integration. The tourism industry has helped growth in other sectors as diverse as horticulture, handicraft, agriculture and construction [13]. Although North Eastern states are attractable zone of tourism but both the central as well state governments did not pay due attention for socio-economic development of these states [16]. Indian tourism has a vast potential for generating employment and foreign exchange earnings [11]. The growing rate of domestic as well foreign tourist inflow into India and especially in the North eastern states is a good sign of brotherhood, peace, harmony and integration.

Realising the importance of Tourism sector, the present study has been undertaken to analyse the demand side aspects of tourism industry in the context on north east India.

1.1. Significance of the Study

This study reflects an in depth analysis of demand side aspects as well as revenue generation from the tourism industry. It brings out the issues like trends and patterns of domestic and foreign tourist inflow along with the growth rate of tourists visits across north eastern states of India. Moreover this study also reveals the contribution of revenue generated from tourism industry to the state domestic products of north eastern states of India. In this juncture, this research study provides various insights in to the strategies to be taken by both governments as well non-government organizations to attract more number of tourists in the study area. Necessary steps can also be taken by policy makers and planners to make tourism industry as high revenue yielding one to expand economic growth and development of north eastern region.

1.2. Conceptual Framework

Tourism industry in modern globalised era is a rapidly growing industry having huge demand and supply potentials across different states of India. This industry is widely becoming popular from the view of recreation, adventures, temporary movement for joy and happiness. Tourism industry is composed of basically three segments which are demand for tourism, supply of tourism and resultant revenue generation. Demand side aspects of the industry can be examined by the domestic and foreign tourist inflow which indicates the attraction of tourists of both kinds towards the tourist spots of north eastern region of India. On the supply side aspects, issues like transportation, hospitality, fooding and lodging, safe arrival, departure, pleasant and safe visit in tourist spots are considered important. This study is confined to analyse the demand side aspects of the tourism industry across eight north eastern states of India.

2. OBJECTIVES OF THE STUDY

- To analyze the trends and patterns of domestic and foreign tourist inflow into the North Eastern States during the time period 2005-06 to 2016-17.
- To analyze the state wise annual growth rate of tourist inflow both domestic and foreign across the North Eastern states during the same time period.
- To examine the growth rate of revenue earning of selected North Eastern states and its contribution to state GDPs of these states during 2005-06 to 2013-14.

3. METHODOLOGY OF THE STUDY

This study is based on secondary sources of data. Data for the present study has been collected from NEDFi Data Bank. Moreover, to collect the detailed data about tourist inflow and revenue earning from tourism both at the state level as well as district level of all the N.E states, different other secondary sources have been used. The sources are- Ministry of Tourism, Government of India, India Tourism Statistics, Source: Ministry of Statistics and Programme implementation (MOSPI) Government of India Statistical Handbook of N.E states, Statistical Abstract of N.E states, Economic Survey Reports of N.E states, Tourism and Civil Aviation Department of N.E states, Economic Review Report of N.E states etc.

The data has been analyzed with the help of descriptive statistics like tabular and graphic presentations. In order to present the chronological trend of tourist inflow, trend line has been used. Moreover, percentage annual growth rate of tourist inflow and revenue collection has been calculated for a particular north eastern state in a time period t by using the following formula-

$$\text{Growth Rate} = \frac{A}{B} \times 100$$

Where, A= difference between the variables (say tourist inflow, revenue collection etc.) at period t and (t-1) in a state. B= the variable in (t-1) time period in that state.

4. DATA ANALYSIS AND INTERPRETATION

4.1. Trends and Patterns of Domestic Tourist's inflow in the North Eastern Region during 2005-06 to 2016-17

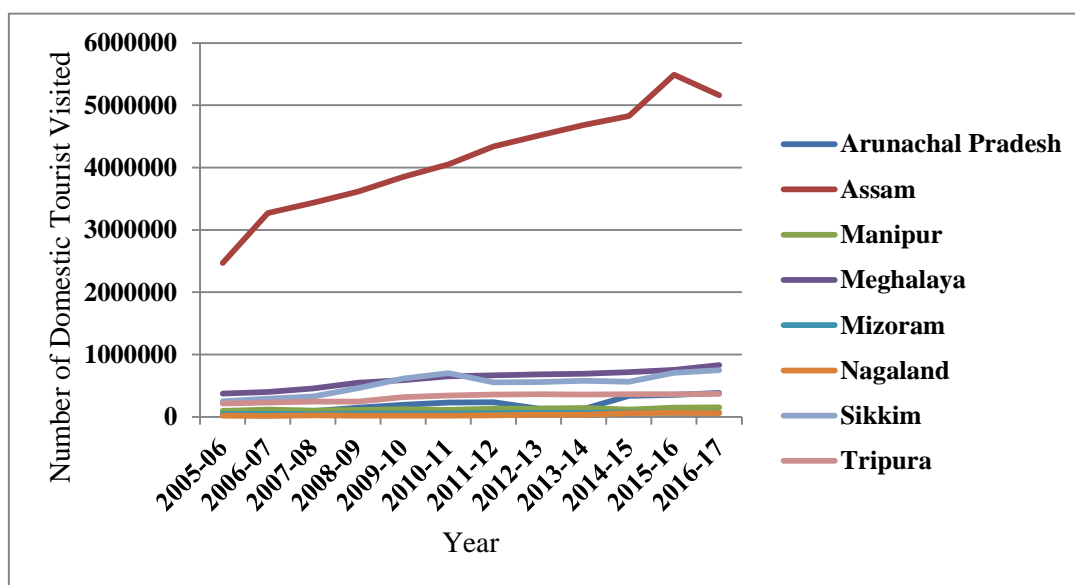


Figure 1. State wise trend of domestic tourist's inflow across N. E States during 2005- 2016

Source: Ministry of Tourism, Government of India, 2005-17; Statistical Handbook of Assam (2013-17); Mizoram (2008-14); Nagaland (2013-16)

As per the trend line shown in figure 1, Assam has the highest annual rate of domestic tourist visits among all N.E states. This is followed by Meghalaya, Sikkim and Arunachal Pradesh. Interestingly, Assam's average domestic tourist turn out for the last two years (i.e. 2015-16 and 2016-17) is around 6.4 times more than the second most tourist attracting state i.e. Meghalaya. Thus, the figure for Assam is unnecessarily high. The prime reason behind this could be the fact that, Assam is the gateway to the North East. In other words, any visitor domestic or foreign visits Assam and other N.E states are bound to pass through Assam during transit and may be automatically recorded under tourist inflow into Assam. However, the graphic in figure 1 suggests that, the average growth rate for all the other N.E states are positive but low as the other states do not show a clearly rising trend in the long run.

4.2. Trends and Patterns of Foreign Tourist's inflow in the North Eastern Region during 2005-06 to 2016-17

So far as figure 2 is concerned about State wise Number of Foreign Tourist Visits in North-Eastern Region of India, 2005 -2016, it is found that, Sikkim has a dominant position since 2007-08 and the growth rate of foreign tourist inflow has been the highest. Till 2013-14, Assam attracted the second highest number of foreign tourist per annum. However, since 2014, Tripura has overtaken Assam in total foreign tourist inflow per annum. Over the last two years Assam has experienced a sharp decline in foreign tourist inflow whereas, Sikkim has seen a very Sharp rise in the same. States like Meghalaya, Arunachal Pradesh, Nagaland, Mizoram and Manipur do not show any signs of growth in foreign tourist inflow.

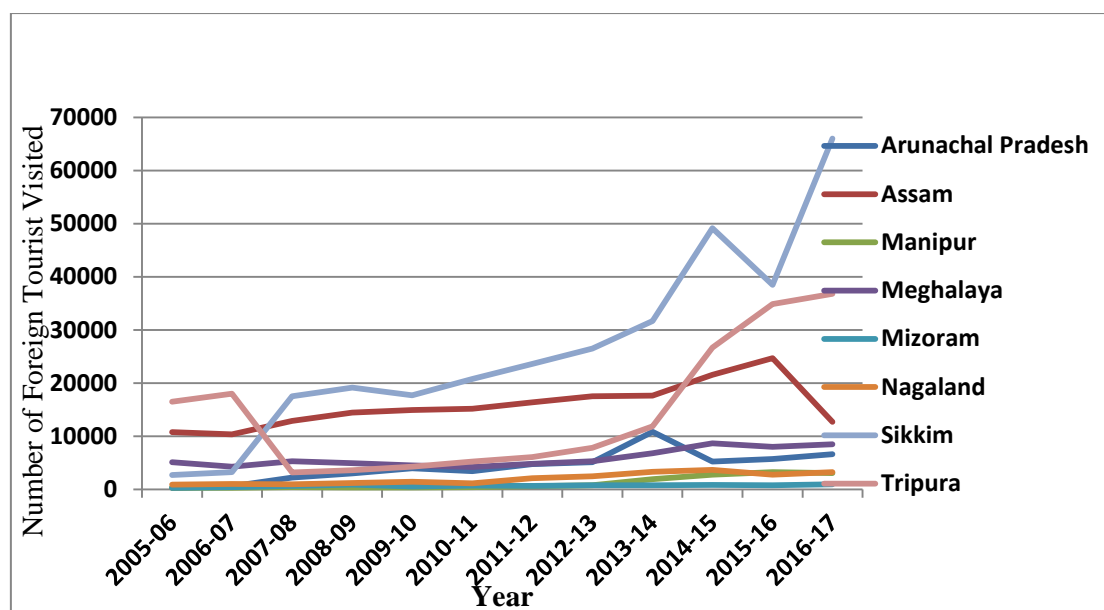


Figure 2. State wise trend of foreign tourist's inflow across N. E States during 2005- 2016

Source: Ministry of Tourism, Government of India, 2005-17; Statistical Handbook of Assam (2013-17); Mizoram (2008-14); Nagaland (2013-16)

4.3 Growth Rate of Domestic tourist's inflow in the N.E Region during 2005-06 to 2016-17

Table 1 State Wise Annual Growth rate of Domestic Tourist's inflow in to N.E States

Year	Arunachal Pradesh	Assa-m	Manipur	Meghalaya	Mizoram	Nagala-nd	Sikki-m	Tripura	N.E. Region	All India
2005-06	-	-	-	-	-	-	-	-	-	-
2006-07	58.5	32.5	24.1	6.8	14.0	-9.3	16.2	6.6	26.7	18.0
2007-08	13.7	5.1	-13.2	14.0	-15.3	39.3	12.5	6.1	6.0	13.9
2008-09	63.9	5.3	10.5	20.2	29.6	-4.3	40.0	0.3	10.3	6.9
2009-10	30.7	6.4	10.8	7.5	1.3	-0.8	33.7	29.4	10.7	18.8
2010-11	16.8	5.2	-8.2	10.4	1.1	0.7	13.7	7.8	6.8	11.8
2011-12	2.4	7.1	17.9	2.3	8.5	20.4	-21.1	5.0	3.4	15.6
2012-13	-43.3	4.0	0.0	1.9	3.3	41.4	1.1	0.6	1.6	20.9
2013-14	-5.1	3.8	4.6	1.6	-1.4	-0.8	3.3	-0.6	3.1	9.6
2014-15	167.8	3.0	-17.9	3.6	7.6	64.2	-2.5	0.5	5.5	11.9
2015-16	4.8	13.8	26.6	4.8	-2.3	10.4	25.4	0.5	12.7	11.7
2016-17	9.6	-6.0	3.1	10.6	1.0	-10.0	6.0	2.1	-2.1	12.7
Avg. GR	29.1	7.3	5.3	7.6	4.3	13.8	11.7	5.3	7.7	13.8

Source: Researcher's own calculation based on secondary data.

Table 1 presents the annual growth rate of the number of domestic tourist visits into N.E states over the same time period 2005- 16. While the All India domestic tourist visits growth rate is found at 13.8percent per annum on an average during the study period, the growth rate for Arunachal Pradesh on an average turns out to be 29.1percent which is the highest among the N.E states. Both Nagaland and Sikkim have shown double digit in domestic tourist visit growth on an average. However, the domestic tourist growth is extra ordinarily high for Arunachal Pradesh. For entire N.E region, the average domestic tourist visits growth was found at 7.7percent which is far lower than the All India average during the same time period.

4.3. Growth Rate of Foreign tourist's inflow in the N.E Region during 2005-06 to 2016-17

Table 2 State wise Annual Growth rate of foreign Tourist's inflow in to N.E States

Year	Arunachal Pradesh	Assam	Manip-ur	Meghalaya	Mizoram	Nagaland	Sikkim	Tripura	N.E. Region	All India
2005-06	-	-	-	-	-	-	-	-	-	-
2006-07	110.03	-3.78	-6.65	-15.92	59.71	13.48	21.22	9.10	3.88	14.73
2007-08	264.42	24.34	34.24	22.86	53.44	-6.59	439.23	-82.35	12.51	16.34
2008-09	36.53	11.84	-10.61	-6.61	34.83	29.17	9.46	12.45	10.46	6.37
2009-10	30.63	3.58	-4.80	-8.07	-43.13	17.70	-7.43	18.70	0.20	1.84
2010-11	-13.94	1.44	15.43	-7.63	42.50	-20.45	17.07	22.75	6.91	24.62
2011-12	40.00	8.20	48.59	14.99	-9.99	83.75	13.71	16.00	15.64	8.86
2012-13	8.04	6.97	29.58	10.62	13.07	19.66	12.23	29.67	12.53	-6.33
2013-14	111.22	0.54	154.74	27.48	7.53	32.74	19.66	51.19	27.93	9.24
2014-15	-52.02	22.11	45.13	27.92	4.50	11.35	55.14	125.16	39.77	13.12
2015-16	9.63	14.78	17.73	-7.35	-4.55	-24.73	-21.75	30.72	0.08	3.36
2016-17	15.65	-48.69	-6.01	5.59	18.05	17.73	71.55	5.43	16.16	5.92
Avg. GR	50.93	3.76	28.85	5.81	16.00	15.80	57.28	21.71	13.28	8.92

Source: Researcher's own calculation based on secondary data

Table 2 shows the average annual growth statistics of foreign tourist's inflow in to the N.E region. As demonstrated in above table, in case of foreign tourist arrival, Sikkim has grown at around 57 percent per annum on an average while Andhra Pradesh has grown at around 51 percent per annum. Interestingly, both Sikkim and Andhra Pradesh have grown much faster than N.E region as a whole (13.3 percent) and also compared to all India growth rate of 8.9 percent annual average growth rate of foreign tourist arrival has been found to be lowest for Assam (3.76) which indicates less attraction of foreign tourist towards Assam.

4.4. Contribution of Tourism Revenue to State GDP during 2005-06 to 2013-14

Tourism revenue data on an annual basis was available for the time period from 2005-06 to 2013-14 for only four states of N.E region which are- Assam, Manipur, Mizoram and Tripura. With the help of this data set, Percentage contribution of tourism revenue to the state GDP of these states on annual basis has been estimated. Moreover, Percentage growth rate in revenue generation per annum from tourism sector has also been estimated. Table 3 and 4 shows the contribution of tourism revenue to state Gross Domestic Products (GDP) and annual growth rate of revenue generation.

Table 3 Percentage Contribution of Tourism Revenue to the State GDP of Selected N.E States

Year	Assam	Manipur	Mizoram	Tripura
2005-06	0.002	0.003	0.024	0.049
2006-07	0.001	0.004	0.027	0.005
2007-08	0.002	0.007	0.026	0.005
2008-09	0.002	0.002	0.029	0.005
2009-10	0.002	0.000	0.029	0.008
2010-11	0.002	0.000	0.030	0.011
2011-12	0.002	0.001	0.032	0.012
2012-13	0.003	0.002	0.033	0.010
2013-14	0.002	0.002	0.043	0.010
Average percentage contribution	0.002	0.002	0.030	0.013

Source: Researcher's Own calculation based on secondary data

As seen from table 3, average percentage contribution of tourism revenue to the state GDPs of four states for the period 2005-14 has been found to be highest for the state Mizoram and lowest for two states Assam and Manipur. Considering the year wise contribution, it is seen that, Assam's tourism revenue has the highest contribution to its GDP in 2012-13 which was lesser before and after the period. Manipur's tourism revenue has the highest contribution in 2007-08, Mizoram's tourism revenue has the highest contribution in 2013-014, and Tripura's tourism revenue has the highest contribution in 2005-06.

4.5. Growth Rate of Tourism Revenue during 2005-06 to 2013-14

Table 4 Percentage Growth Rate of Revenue Generation per annum from Tourism Sector

Year	Assam	Manipur	Mizoram	Tripura
2005-06	-	-	-	-
2006-07	-6.7	25.6	16.6	2.9
2007-08	16.8	85.0	5.8	19.2
2008-09	9.4	-59.8	28.7	13.3
2009-10	26.7	-88.1	11.1	63.4
2010-11	9.1	-8.6	20.0	55.7
2011-12	28.5	205.3	3.7	12.1
2012-13	34.5	257.4	11.7	-7.9
2013-14	-22.9	-7.3	39.3	11.4
Avg. Percentage Growth Rate	11.9	51.2	17.1	21.3

Source: Researcher's own calculation based on secondary data

So far as annual percentage growth rate in revenue generation of four selected states are considered as per findings of table 4, it has been found that, Manipur has the highest average percentage growth rate of tourism revenue (51.2percent) and Assam has the lowest growth rate (11.9percent) during the time period 2005-06 to 2013-14. Regarding year wise tourism revenue growth, it can be seen that, Assam has negative growth rate in the year 2006-07 and 2013-14. It indicates the fall in tourism revenue receipt in Assam in recent year. Although Manipur has more negative growth rates compared to Assam, but due to extreme growth rate in the period 2011-2012, the average percentage growth rate is unexpectedly high. Moreover, both the states Mizoram and Tripura has steady growth rate over the time period mentioned above with no negative growth rate in the former state and a negative growth rate in the latter state.

5. SUMMARY OF MAJOR FINDINGS

1. The study reveals that, Assam has occupied the dominant position in case domestic tourist inflow among rest of the north eastern states during the study period 2005-2017.
2. On an average, states like Nagaland and Manipur has least number of domestic tourist inflow compared to other states of north east India.
3. From the beginning of 2005, Meghalaya has been experiencing a rising trend in domestic tourist inflow.
4. Nagaland and Manipur are least preferred states for domestic tourists.
5. Interestingly, the smallest state Sikkim occupies the dominant position in case foreign tourist inflow compared to rest of the north eastern states.
6. Assam has also experienced a rising trend in case of foreign tourist inflow with a slight downtrend during the time period 2014-16.
7. Nagaland, Manipur and Mizoram are the least preferred states to the foreign tourists.

8. Highest average growth rate of domestic tourist inflow has been observed in Arunachal Pradesh and lowest has been observed in case of Mizoram though with a negative growth rate in two consecutive years 2012-13 to 2013-14.

9. Arunachal Pradesh and Sikkim shows a faster growth rate in foreign tourist inflow though the latter dominates the former state.

10. Percentage contribution of tourism revenue has been found to be highest for Mizoram and lowest for Assam and Manipur among four selected states like- Assam, Manipur, Mizoram and Tripura.

6. LIMITATIONS AND FUTURE SCOPE OF THE STUDY

- This study is confined to north eastern region of India which can be extended to the other regions of India to draw a general idea of tourism industry of India as a whole.
- The study is confined to demand side analysis only which can be extended to include supply side aspects of tourism industry.
- On account of lack of secondary data, tourism scenario from 2018 onwards could not be analyzed. However this can be done in future studies.
- Lack of secondary data on revenue generation from the tourism industry has compelled to include only four selected states like Assam, Manipur, Mizoram and Tripura only.

7. CONCLUSION AND POLICY SUGGESTIONS

From the study, it has been found that, in case of domestic tourist inflow in to N. E region, Assam has an unexpected high number of domestic tourist inflows which is the highest in the northeast followed by Meghalaya, Sikkim and Arunachal Pradesh. However, the growth rate of domestic tourist inflow has been found to highest for the state Arunachal Pradesh. Regarding foreign tourist inflow in to N.E region, it has been found that, Sikkim has a dominant position. However, in case of average annual growth rate of foreign tourist inflow, Sikkim and Arunachal Pradesh have grown much faster. Average percentage contribution of tourism revenue has been found to be highest for state GDP of Mizoram and lowest for Assam and Manipur. However, average percentage growth rate of revenue has been found to be highest for Manipur and lowest for Assam. Thus, it can be concluded that, tourism demand in the North Eastern region has shown a growing trend. Both domestic and foreign tourists are increasingly becoming attracted to the natural scenario of North Eastern States. As a result of this growing tourism growth, North Eastern region as a whole is getting benefitted in terms of various types of employment and earning. Government of North Eastern states are also earning good amount of revenue from tourism sector.

On the basis of findings of the study, it is suggested that, governments, NGOs and general people must take steps to enhance the tourism industry in North Eastern states which will help in a bigger way in the development of the region.

E permit system can be introduced for the greater benefit of domestic as well foreign tourists to enter in to tourism spots of those north eastern states which needs inner line permit for entry.

The Public works Department under state governments and local self government machinery must take necessary and immediate steps to reconstruct the broken and backward roads for more inflow of tourists in to north eastern states of India.

The governments of north eastern states and especially of Nagaland must take steps to ensure peace and harmony to attract more tourists' inflow in to Nagaland.

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