

Analysis of Tourist Arrival in Nepal

Laxmi Kanta Sharma

Associate Professor of Economics,
CEDA, T.U.

- Ambika Ghimire

Central Department of Environment Science, TU, Nepal

Abstract

The present paper is prepared based on review of literature and secondary data with an objective to analyze the trend of tourist arrivals in Nepal in last eighteen years. Attempt has been made to capture different aspects of tourist arrivals in Nepal. Rate of tourist arrival in Nepal has been found increasing since 2016 with decreasing rate of average expenditure per visitor. Nepal has been formally open for international tourists since 1951 and mountain tourism is the pioneer of all. The overall average length of stay of tourists in Nepal is about 11.77 days for last 18 years. Nepal is popular destination for youths and adults. The fraction of tourist arrival from five countries are; India (16.57%), China (13.1%), USA (7.83%), Sri Lanka (5.94%) and United Kingdom (5.41%). The percentage of male tourist visiting Nepal has been found ever larger than female and major purpose of tourists travelling to Nepal is for the Holiday Pleasure.

Key words: Tourism trend, average length of stay, average expenditure per day per tourists.

1. Introduction

Tourism is journey for recreational, relaxation or professional purposes. The World Tourism Organization explains tourist as people travelling to and remaining in places outside their typical surrounding for not more than one consecutive year for recreation, business and different purposes (UNWTO, 1995). Tourism is fundamentally about individuals travelling out far from home to connect with different individuals and diverse spots. It incorporates the collaboration of two masses: visitors and inhabitants (Bimonte&Punzo, 2016).

The tourism industry is one of the world's best enterprises, having long experienced an almost constant and rapid annual increase in terms of revenues and employment (Pirnar&Gunlu, 2012). Progression of tourism industry has turned into a foremost socioeconomic force in both underdeveloped and improved markets. The speedy development of tourism in the globe started only after the Second World War (WTTC, 2016).

Until the mid of twentieth century, Nepal remained a closed country (Gurung, 1982) and isolation was the national policy (NPC, 1956). As per the popular legend, Manjushree has visited Kathmandu valley as a tourist and has made the Valley inhabitable (Bhandari, 2030). Likewise, King Ashok visited Lumbini and erected the Ashok Pillar at Lumbini and later he had visited the Kathmandu valley. Princess Bhrikuti, the daughter of King Amshuvarma, had married

with Srong-sten Gampo, the king of Lhasa in 592 AD. Moreover, the Chinese traveler Huien-Tsang visited Nepal in 643 A.D. He also visited Lumbini (Sharma, 2033). Many travelers from western countries and India also visited Nepal during the historical period. Captain Kirk Patric visited Nepal in 1792 and wrote a book 'An Account of the Kingdom of Nepal' which could introduce Nepal to outside world especially the western countries(Chapagain, 2017).

Likewise, Rana prime-minister Janga Bahadur Rana's visit to United Kingdom helped Nepal to be introduced in outside world. With the end of Rana period in 1950, Nepal was opened up for foreigners' visit after 1950 and thereafter tourism development slowly started in Nepal.

In the beginning, tourism development was started with mountaineering, for example, Maurice Herzog and Louis Lachenal of France climbed the Annapurna I on June 3, 1950; Tenzing Norgay Sherpa of Nepal and Sir Edmund Hillary of New Zealand successfully climbed the world's highest peak Sagarmatha (Mount Everest) on May 29, 1953 and from then on Nepal's tourism gradually became popular in the world (Shrestha&Shrestha, 2012).

Nepal has been authoritatively open for intercontinental tourism since 1951 and mountain tourism is the pioneer of all the tourism in Nepal. Since the first five year plan(1956-1961), Nepal adopted planned approach to development and tourism was incorporated in the plan. The tourism sector has received the government's continuous attention since the formulation of the first five-year development plan (1956-1960), which identified the need for infrastructure development in tourism..From the tenth plan (2002-2007) Nepal government has given high priority for the tourism development (NPC, 2002).

Statistical recording of foreign tourists to Nepal had started in 1962 by the Department of Tourism. It had just been in the late 1960s that a significant and substantial body of literature on tourism began to rise(Pearce and Butler, 1993). However, up to the end of the 1980s, research on tourism remained almost methodically simple and could not patronize strong theoretical base (Dann, Nash, & Pearce, 1988). A number of researches have been carried out about tourism industry in Nepal. Many papers have already been published on analysis of tourism trend (1950-2000) in Nepal. The present paper is prepared with an objective to analyze the trend of tourist arrivals in Nepal for the period of 2000 - 2018. Attempt has been made to capture the trend of tourism in different aspects of tourist arrivals in Nepal.

Travel and tourism have had a fascination throughout the history. The concept of tourism rose in and around the second half of the nineteenth century with per capita income in the developed nations expanding significantly and the expansion of efficient mass airplane terminal (ICIMOD, 1995). Tourism is regarded as the world's leading and greatest rising industry in all over the globe. The creation of current means of transport, liberal strategy of the government approach and require of economic development through latest and alternative sources of foreign exchange, the quick development of populace, the expanding interest and want of the general population to know the diverse culture, convention, life of the general population and better places of the world and so forth; are the main considerations to advance the travel industry.

Tourism has been playing a crucial role in the socio-economic sectors of the majority of the developed as well as developing countries in the world. Consequently, the greater part of the nations is pulled into this industry attempting their best to reinforce economic life by advancing

the travel industry in the nation. "Tourism has been recognized as a key source of foreign exchange earnings, as an industry creating employment opportunities and generating economic growth of the country" (Shrestha, 1978). In this perspective, tourism has been viewed as the world's largest industry with huge turnover and has become most productive industry in the planet.

Presently, everywhere throughout the globe, tourism is a key factor in trade with international dimensions and as a center component of national economics, as a means for acquiring foreign exchange furthermore as an employment provider (Kumar, Loganathan, Patel, & Kumar, 2015) in both formal and informal sectors (Khalil, Kakar, & Malik, 2007). In 2016, Asia and the Pacific region recorded 308 million international tourist landings (ITAs) with an expansion of 9 percent and South Asia noticed 8 percent increase in ITAs, driven by India (+10 percent), the sub region's top destination.

All over the planet, tourism is referred for its seasonal nature and as among a country's most important sources of employment, which increases simultaneously with tourism activities. Nepal is sufficiently lucky to receive overseas tourists as well as Indian and Chinese visitors in alternative seasons, which helps smoothing out seasonal variations and thereby generating more full time jobs.

Shrestha and Shrestha (2012) conducted a study on tourism in Nepal: A historical perspective and present trend of development. Researchers found that sound development has been recorded in Nepal's tourism industry in the past five decades with the number of tourists visiting the country growing from 6,179 in 1962 to 6,02,867 in the year 2010. The quantity of foreign visitors to Nepal has been rising every year since the year, 1962, except in the years 1965, 1981, 1984, 1989, 1993, 2000, 2001, 2002, 2005 and 2008.

Dhakal (2014) conducted a study on analysis of the tourism in Nepal and trend of tourist arrivals using the data of the Nepal tourism statistics 2012 published by the Government of Nepal in 2013 AD. The tourists' influx has shown a sound trend in different periods in Nepal. The average length of stay of tourist is not so long. The tourist flow in Nepal is generally confined during the spring and autumn seasons. The current pattern of tourists' influx in Nepal seems pleasing.

2. Methodology

This paper depends on the review of existing publications, research papers and review papers associated to tourism trend and tourism statistics in Nepal. Further, distinctive web sources and published papers were reviewed for the preparation. Tourist arrival data of last eighteen years (2000-2018) were gathered from the different editions of Nepal Tourism Statistics published by the Government of Nepal, Ministry of Culture, Tourism and Civil Aviation, Singh Durbar, Kathmandu. The information are extracted, compared and are analyzed in order to explore the tourism development trend as per the requirement of the study. All those collected data were refined and analyzed through simple statistical tools like MS-Excel with suitable charts and graphs.

3. Results

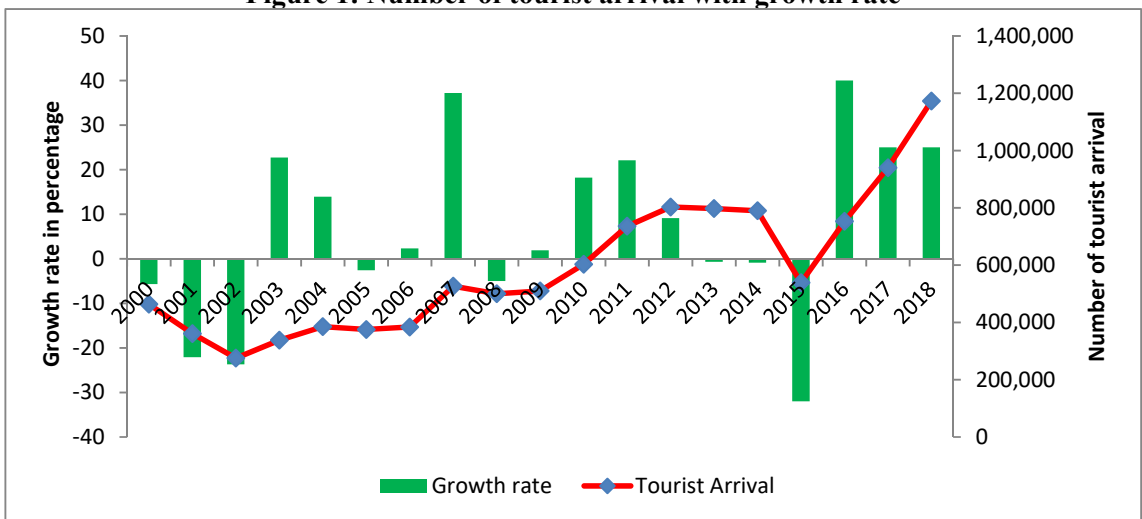
3.1 Trend of Tourist Arrival and Growth Rate

The growth rate of tourist number remained negative and positive alternatively in

different segment of time series from 2000 to 2018. During the period of 2000-2002, in 2005, in 2013-2015, the growth rate remained negative. The major cause of decline in growth remained political and natural calamities, for example the period of 2000-2002 was really volatile due to political conflict in the country through the agenda of People's War. In the year 2015 the safety of travel was jeopardized by devastating Gorkha Earth Quake, it was further deteriorated by economic blocked of India. Looking tourism statistics of the year 2000 to 2018, it is found that the year 2015 was with the lowest growth rate of -32% while in the year 2016, the number of tourists arrival reached to 753002 by a remarkable growth rate of 40 percent over 2015 which was the highest figure of tourist arrival in Nepal. After removal of economic blocked and start of post-earthquake reconstruction again the tourism growth took momentum from 2016 onwards and in 2017 and 2018 the growth is almost constant. In 2019, during the period of past six months January to June, the growth rate remained at 12.6 percent. Regarding the growth rate of Indian and Chinese tourists during January 2019 to June 2019, it remained at 7.36 percent and 19.53 percent respectively(DoT,2019). The overall growth trend of tourist for the period of 2000-2018, has been depicted graphically in following Figure 1.

Figure 1: Number of tourist arrival with growth rate

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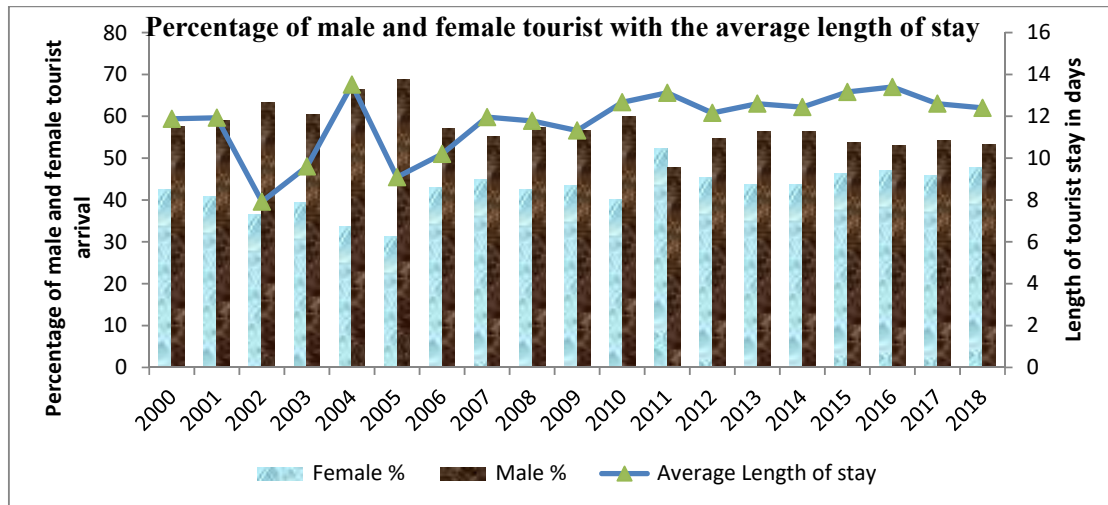
Source: Nepal Tourism Statistics, 2018

3.2 Gender wise Trend of Tourist Arrival

The gender wise trend of tourist arrivals in Nepal demonstrates that the number of male tourists is constantly larger than that of female tourists apart from the year 2011, which indicates male preference for Nepal (Fig 2). However, since 2006 there has been a steady rise in the share of female tourists. The share of female tourists was 44.8 percent in 2007. In the year 2010 the ratio of male and female tourists' arrivals in Nepal were 60.0 and 40.0 respectively of the total entries. In 1993, 61 percent tourists were male and 39 percent were female and in the year 2017, 54.2 percent of male and 45.8 percent of female tourists visited Nepal. After 25 years of tourism development

in 2018, the share of male is 53.3 and that of female share is 47.7 percent. It indicates that there requires an appropriate product to attract the more numbers of female visitors (Nepal tourism statistics, 2018).

Figure 2: Genderwise tourist arrival with average length of stay



Source: Nepal Tourism Statistics, 2018

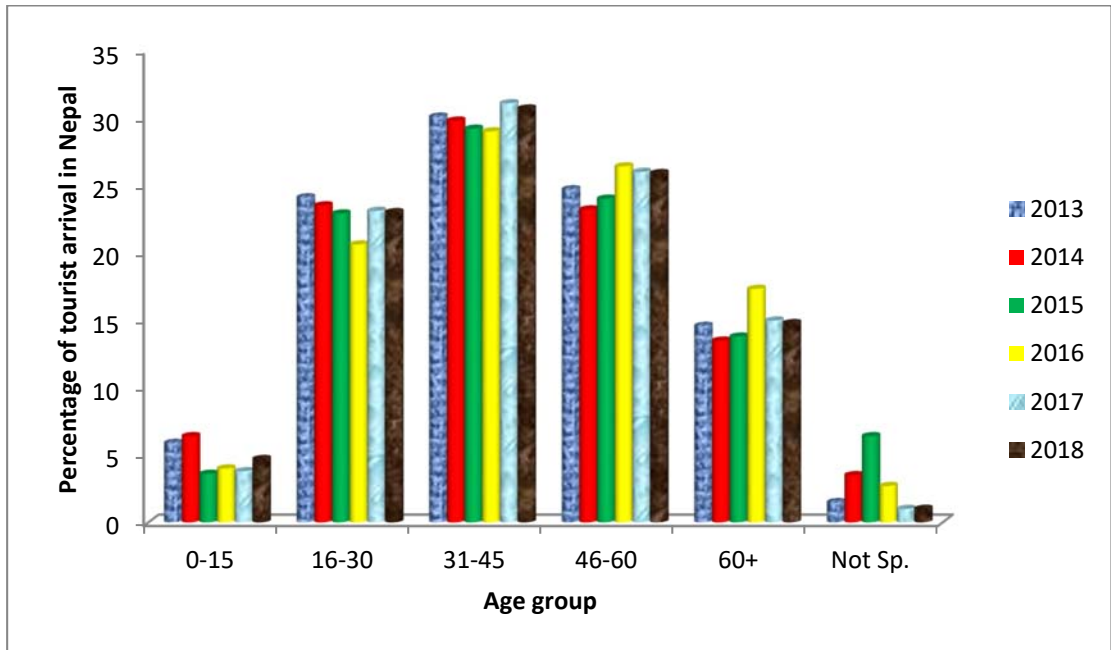
The average length of stay of tourists in a nation has a significant impact in tourism development. Higher length of stay of tourists is additionally advantageous for the economic development of the country in many aspects. The volume of sell and income of tourism increases with the increase of the average length of stay. In 1974, it was 13.20 days, in 1984 it was 11.55, in 2004 it was 13.51, and in 2018 it was 12.40 days. As compared to 2017 the average length of stay of tourists has been decreased by 1.67 percentage from 12.6 to 12.4 days in 2018. In Nepal shortest length of stay of tourists recorded is 7.92 days in 2002 and the longest 13.51 days in the year 2004. The reason behind shortest length of stay in 2002 might be because of people’s war in Nepal. Length of stay has been continuously increasing after 2005. The overall average length of stay of tourists in Nepal is about 11.77 days for last 18 years. The trend shows stagnation around 12 and 13 days in the tourist’s length of stay in the last five years. It seems that usually the tourists who arrive for mountain tourism activities have longer length of stay in Nepal. On one side, there is an urgent need to increase the number of tourists and on the other the average length of stay also should be increased to generate more income and employment from tourism. Nepal government and tourism stakeholders must be proactive towards this issue which demands the enhancement of quality of life of visitors who must have a positive and exciting experience with an intention of revisit Nepal and recommend other to visit Nepal.

3.3 Age wise Tourist Arrival

As indicated by the age wise tourist landing pattern in Nepal, in the early periods the highest share was occupied by the younger age group 16-30 followed by the age group of 31-45,

46-60 & over and 0-15 since 1965 to 1991 except in 1985 (Shrestha & Shrestha, 2012). In 1993, 16-30 years of age group tourists were 31.3 percent, 31-45 years of age group were 32.9 percent, 46-60 years of age group were 20.4 percent and 60+ tourists were 10.2 percent, this ratio has been changed to 23 percent, 30.7 percent, 25.9 percent and 14.8 percent respectively in the year 2018. But since the year 2013 to 2017 the trend showed that the age group of 31-45 has a higher share and age group of 46-60, 16-30, 60+ and 0-15 secured second, third, fourth and fifth position respectively. In the year 2017 among the total tourist arrivals in Nepal 31.1 percent were under the age of 31-45 and 26 percent were over the age of 46-60 years. It shows that Nepal is popular destination for youths and adults and tourism activities in Nepal should be promoted as per the interest of the majority age group of visitors.

Figure 3. Age wise percentage of tourist arrival in Nepal



Source: Nepal tourism statistics, 2018

3.4 Trend of Tourist Arrival by Nationalities.

Out of total tourist arrivals in Nepal, five nations occupy more than 50 percent share. The fraction of tourists from these countries are; India (16.57%), China (13.1%), USA (7.83%), Srilanka (5.94%) and United Kingdom (5.41%) respectively (NTS, 2018). In average, number of tourists arrival from third countries is 477870.10 and from India is 114509.47(Fig 4). According to the data available from 2008 to 2018, average share of Indian tourists is 18.28 percentage whereas Chinese tourist share 10.58% (Fig 5). In 2018, altogether 43,82,233 passengers including 22,01,775 outbound and 21,80,458 inbound passengers have been carried out by 29 international airlines in Nepal (DoT,2019).

Figure 4. Tourist arrival from India and third countries

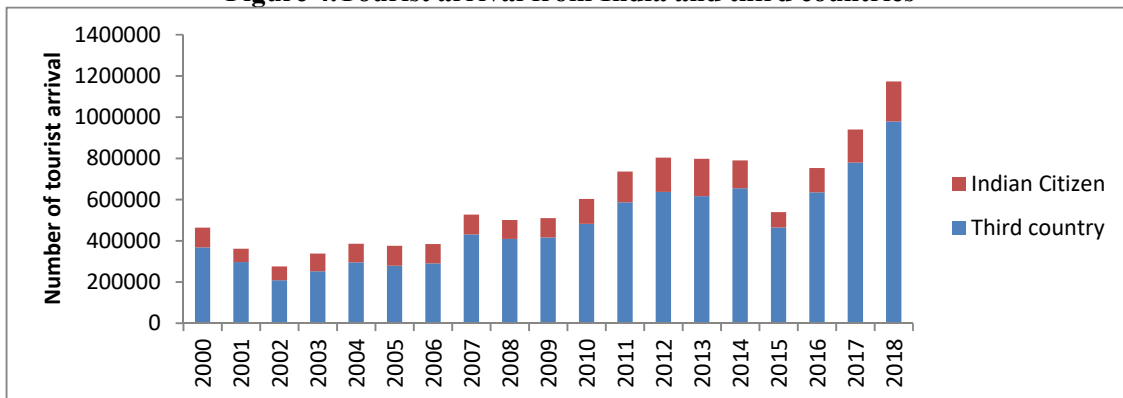
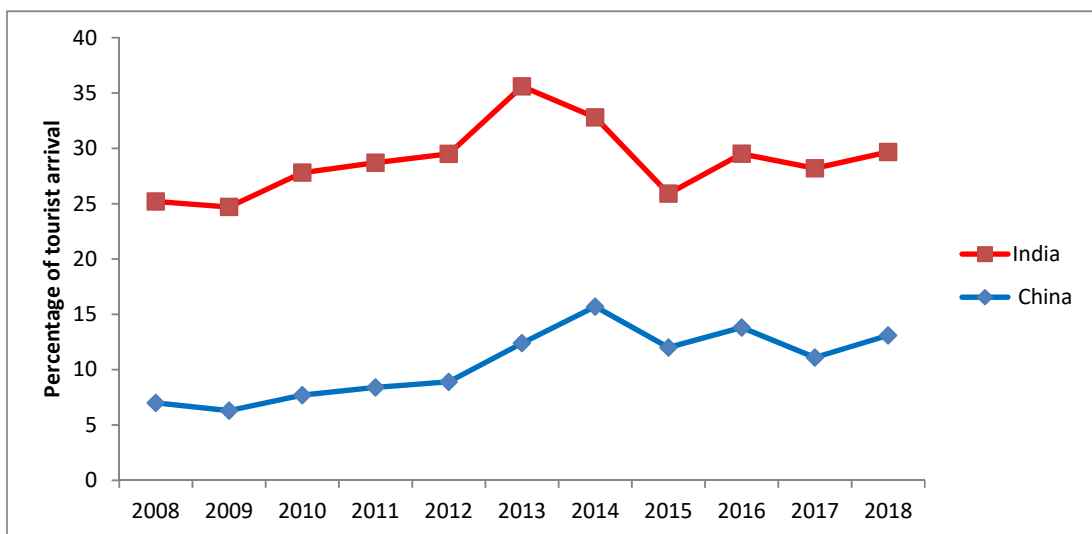


Fig 4. Number of tourist arrival by Nationalities

Figure 5. Percentage of Indian and Chinese tourist arrival



Source: Nepal Tourism Statistics, 2018

3.5 Purpose of Visit and Trend of Tourist Arrival

Purpose of visit - a major indicator is useful for evaluation of characteristics, type and economic and social contributions made by tourists. It helps in planning and management of infrastructure, services and market. It also measures the inflow of high value tourists. Historical data shows that more than 60 percent of the tourists arrive in Nepal with purpose of holiday celebration and pleasure. Every year the majority of the tourists arriving Nepal come for the purpose of holiday and pleasure. Since the very beginning of tourism development in Nepal, above 75 percent tourists arriving Nepal came with the purpose of holiday/pleasure and it remained so until 1989(Shrestha&Shrestha, 2012).Year 2018 recorded highest proportion (60%) tourists have visited Nepal for holiday and pleasure and adventure including trekking & mountaineering

recorded second highest proportion (16%), followed by pilgrimage (14.4%) and other purpose (9.6%).

The number of tourists coming for trekking/mountaineering purpose has been increasing with the share growing from 0.4% in 1965 to 27.9% in 2001. According to the data for 2009, most of the incoming tourists (26.1%) had come for mountain tourism. This proves that mountain tourism is the prominent tourism product of Nepal and the country is the market leader in this sector (Shrestha&Shrestha, 2012).

Table 1: Trend of Tourist Arrival by Purpose

Year	Holiday Pleasure	Trekking & Mountaineering	Business	Pilgrimage	Official	Conv. / Conf.	Others
2000	55.2	25.6	6.4	3.4	4.5	1.2	3.7
2001	51.8	27.9	5.1	3.8	5.2	0	6.2
2002	40	21.5	6.2	4.5	6.5	0	21.4
2003	29	19.4	5.7	6.3	6.5	0	33.1
2004	43.4	18	3.6	11.9	4.4	0	18.7
2005	42.7	16.4	5.9	12.7	4.5	0	17.9
2006	27.7	12.7	4	11.3	3.4	0	13.8
2007	41.4	19.2	4.6	10	4.1	1.5	14.9
2008	29.6	21	4.6	9	8.6	1.4	19.9
2009	27.6	26.1	4.5	10.1	4.8	2	17.1
2010	43.8	11.6	3.5	16.8	4.4	1.6	8.7
2011	57.8	11.7	2.4	8.7	3.3	1.5	5.1
2012	47.3	13.1	3.1	13.7	3.8	1.7	6
2013	54.9	12.2	3.8	5.1	5	2	7.8
2014	50.1	12.3	3.1	12.5	4.1	1.7	6.8
2015	71.63	1.7	3.87	2.78	3.99	1.68	14.35
2016	65	8.83	3.23	11	2.83	1.7	7.41
2017	70.0	8.0	-	15.0	-	-	7
2018	60.0	16.0	-	14.4	-	-	9.6
Average	47.83	15.95	4.32	9.6	4.7	1.0	12.6

Source: Nepal Tourism Statistics, 2018

In the year 2015, holiday pleasure share highest percentage of tourists with 71.63 tourist arrival in last seventeen years. In average tourist arrival for the purpose of holiday pleasure, trekking and mountaineering, pilgrimage, official and business occupy first, second, third, fourth and fifth position respectively (Table 1).

3.6 Seasonal Trend of Tourist Arrivals

Spring season continues in Nepal from March till May. The temperature is about 22^o C with slight rainfalls at night and clear skies in the morning. Tourists can enjoy adventure activities like Paragliding, Bunjee, Rafting, Trekking in spring weather. It is one of the major tourist seasons in Nepal.

Summer continues in Nepal from June till August and temperature is 30^o C. It is the time of monsoon rain in Nepal and a season of farming. Tourists can enjoy paddy plantations during this time of the year. Spectacular views of lush and green hills washed by rainwater are soothing to look at Autumn is the time from September to November with temperature ranging from 10^o C to 25^o C. It is the pleasantest time for celebrating biggest Hindu festival Dashain and Tihar. During this season of paddy harvest, nature ripens in yellow. It is the time after monsoon rain washes the whole surrounding. Tourists can enjoy panoramic mountain views during this time. It is the popular trek season in Nepal where the sky is clear, blue and the weather clear. The chill winter lasts from December to February. It is the dry season with bare hills and mountains. Midwinter offers the clearest view of snow-capped mountains. But the temperature at high altitude is low and least visitors.

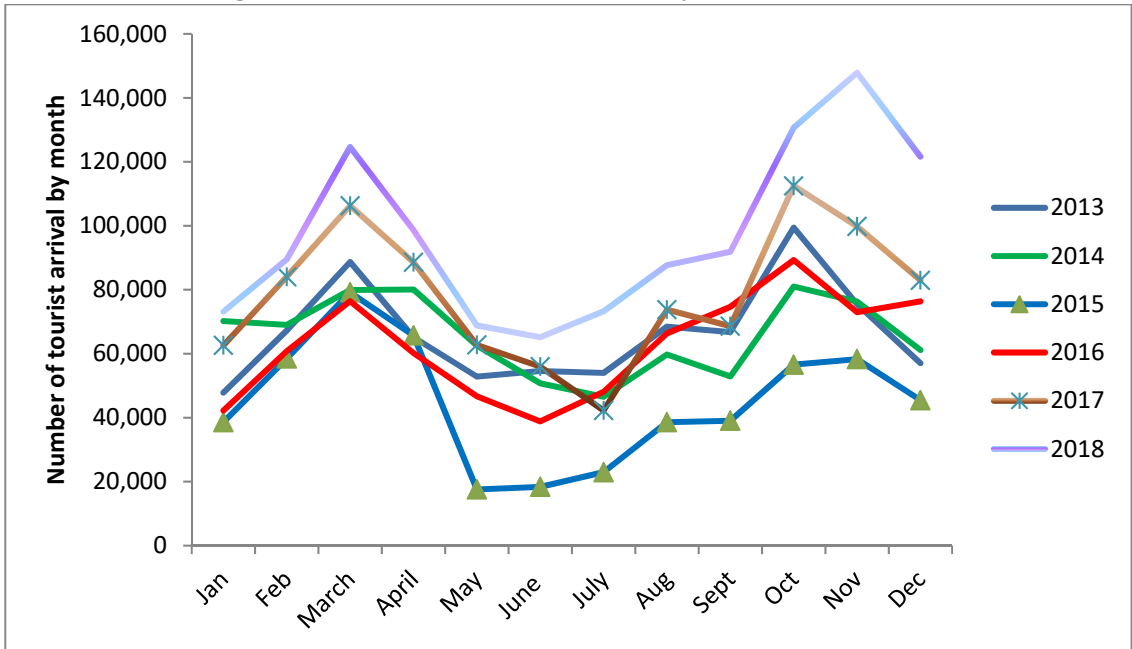
The tourist influx in Nepal is usually limited during the Spring and Autumn seasons. March, April of Spring season and October, November of Autumn season, these four months are crest seasons for tourist entry to Nepal (Table 2). Amongst the total tourists arrival in a year about 11.4 percent tourists visit the country in the month of October followed by March (11.12%), November (10.6%) and April (9.1%) respectively. Likewise, June and July are recorded as with lowest tourist entrance months with share of 5.6 and 5.7 percent respectively (Table 2). In general tourists are more concentrated in four months March, April, October and November. However, in recent years there is sign that tourists specially Indian and Chinese are coming to Nepal gradually in other seasons too.

Table 2: Seasonal Trend of Tourist Arrival

Year	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
2013	47,846	67,264	88,697	65,152	52,834	54,599	54,011	68,478	66,755	99,426	75,485	57,069
2014	70196	69009	79914	80053	62558	50731	46546	59761	52894	80993	76305	61158
2015	38,616	58,523	79,187	65,729	17,569	18,368	22,967	38,606	39,050	56,584	58,304	45,467
2016	42,235	60,821	76,444	60,214	46,683	38,852	48,115	66,341	74,670	89,281	72,990	76,356
2017	62,632	84,061	106,291	88,591	62,773	55,956	42,240	73,778	68,634	112,492	99,804	82,966
2018	73,187	89,507	124,686	98,650	68,825	65,159	73,281	87,679	91,874	130,745	147,859	121,620
Average	55,785	71,531	92,537	76,398	51,874	47,278	47,860	65,774	65,646	94,920	88,458	74,106
Percentage	6.7	8.5	11.12	9.18	6.23	5.6	5.7	7.9	7.8	11.4	10.6	8.9

Source: Nepal Tourism Statistics, 2018

Figure 6. Number of tourists arrival by month, 2013-2018

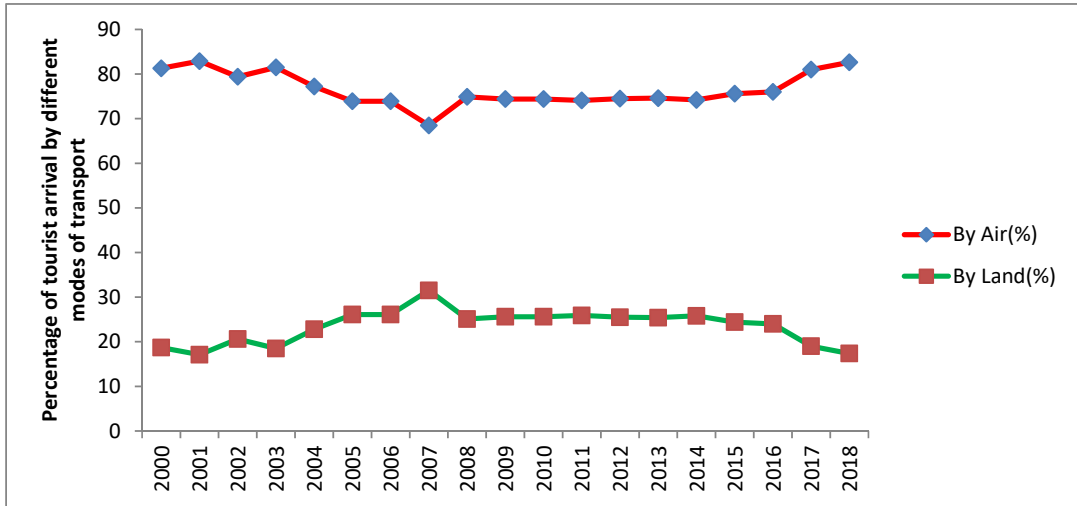


Source: Nepal Tourism Statistics, 2018

3.7 Tourist Arrival by Different Modes of Transportation

The accessible transport benefit, regardless it may be air or land has a pivotal factor to draw in travelers in the nation. Above 80 percent tourists came to Nepal by air transport. In the early years above 80 percent tourists uses air service while visiting Nepal and below 20 percent tourists they came by land transport service. However, the mode of transport of tourists visiting Nepal has changed since 2002 (Shrestha & Shrestha, 2012). Since 2002, except the year 2003, 2017 and 2018 below 80 percent tourists came by air and above 20 percent came via land. This may be due to the growing road and transport facilities in the country. In the year 2017, 81% of the tourist came Nepal using international airline services and 19% with land transport (Fig 7). In 2018, the tourists arrival by air has been increased by 27.44 percent to 9,69,287 and by land it has been increased by 13.44 percent to 2,03,785(NTS,2018).

Figure 7. Percentage of tourist arrival by different modes of transport

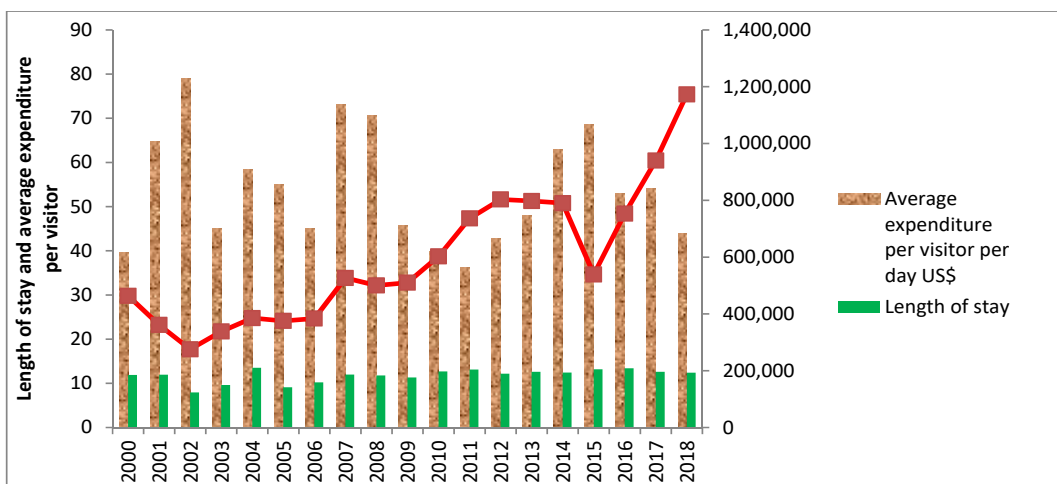


Source: Nepal Tourism Statistics, 2018

3.8 Tourist Arrival, Length of Stay and Average Expenditure

Data from the year, 2000 to 2018 reveals that average expenditure per visitor per day is fluctuating. In the year 2002, average expenditure per visitor per day was US\$ 79.1 and length of stay in that year was of 7.92 days which is shortest period in last eighteen years. From last two years tourist arrival is increasing but at the same time average expenditure is decreasing (Fig 8). This shows formulation and implementation of such program, plans and policies focusing on not only toward increasing the tourist arrival but also to increase length of stay and expenditure rate per visitor per day is essential.

Figure8: Tourist arrival, length of stay and average expenditure per visitor per day

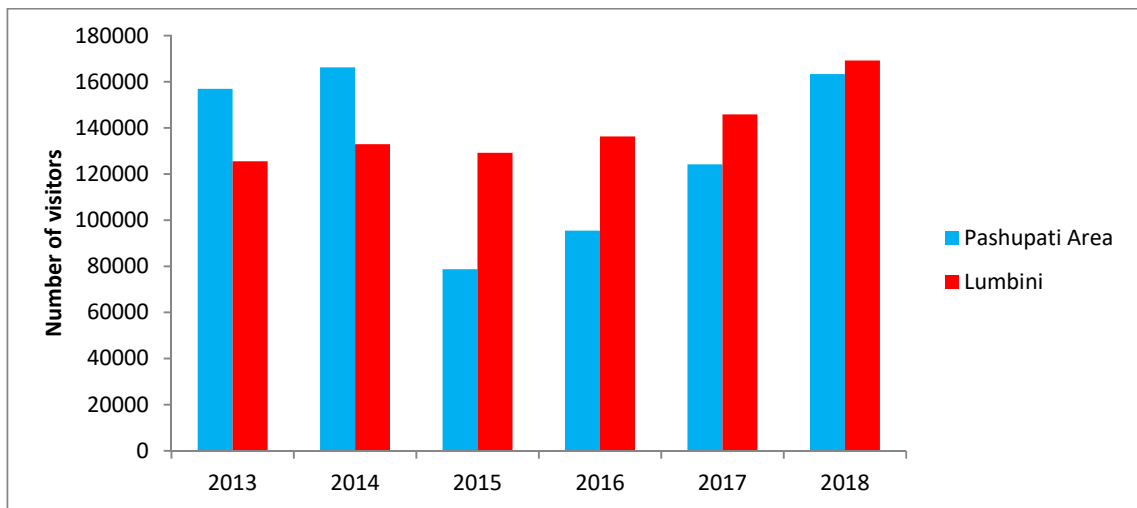


Source: Nepal tourism statistics, 2018

3.9 Visitor Trend in Pashupati Area and Lumbini

Nepal is famous destination for pilgrimage due to its prominent, glorious and pridedful historical and sacred places. Lumbini, being birth place of Lord Buddha and Pashupatinath, a centre of faith for Hinduism is major among many important places. Lumbini is found as most visited pilgrimage by foreigners. Data generated from last six years (2013-2018) shows that, number of visitor in Pashupatinath was highest in the year 2014 which was 1,66,173. Trend of visitor in Pashupatinath tremendously decreased in the year 2015 this might be because of devastating earthquake. Visitors in this temple go on increasing in 2016 and 2017 continuously. While the numbers of visitor in Pashupatinath were decreasing at the same time, number of visitors in Lumbini started increasing. The year 2018 was the highest visitor influx in Lumbini in last six years (Fig.9). In 2018, it was visited by 1,517,134 persons out of them 76.2% were Nepalese while 12.7% Indians and 11.2 % from other countries. It shows that, number of tourists arriving to Pashupatinath temple has gradually increased from 1,56,858 visitors of 2013 to 1,63,311 visitors in 2018(excluding Indian citizen). During last few years the number of tourists from India and China has been constantly increasing over there. November, December are the most preferred month for Lumbini visit (NTS, 2018). Though the numbers of visitors are increased in Lumbini but only 10 percent of the visitors stay for a day. Investment in Public Private Partnership modality is essential to increase the average length of stay in Lumbini.

Figure 9: Numbers of visitors in Pashupati and Lumbini (excluding Indian citizens)



Source: Nepal Tourism Statistics, 2014, 2015, 2016, 2017, 2018.

4. Conclusion and Recommendation

After 1950, the travel industry in a very short period of time has made an exciting progress in Nepal. Tourist arrival in last seventy years has been constantly growing. However significant improvement in tourist arrival has been recorded during 2000-2018 period with a highest number of tourist arrival of 11,73,072 in 2018. But in terms of growth rate, the year 1991 recorded a historically highest growth rate of 91.4 percent. In 2018, July was the month with

highest growth (73.49%) of tourists number and Indian tourists growth stood highest (80.37%) during this month. Among the land routes 1,65,818 tourists enter through Bhairahawa followed by Rasuwagadhi and Kakadbhitta with 26,312 and 6,997 tourists respectively. The gender wise trend of tourist arrival in Nepal shows that the number of male tourists is for all time larger than that of female tourists. The average length of stay of tourists in Nepal started continuously increasing after 2005. Most of the tourists visiting Nepal come for holiday/pleasure purpose in which influx of tourist is peak in the months of March, April of Spring season and October, November of Autumn season. Enhancement of transport and communication facilities in Nepal has promoted the arrival of tourists by land and air. Since last two years tourist arrival has been increasing but at the same time average expenditure per visitor per day is declining from 54 US\$ to 44 US\$ in 2018. Since 2016 the number of tourists from Myanmar has also been increasing and reached to 41,402 in 2018.

The overall trend analysis indicates that the number of tourists arrival in Nepal is in increasing trend and seasonal fluctuation is also getting minimized with influx of Indian and Chinese tourists in off seasons. Tourism planner and policy makers have to focus their attention towards better service delivery with improved access and accommodations with ample opportunities of distinct natural experiences to tourists. The declining average length of stay and per tourist per day expenditure clearly indicates that there are certain lapses on our service delivery modality and recreational activities. In order to develop tourism sector, the quality of life of local tourism stakeholders and visitors should be increased in all dimensions. To recapitulate, there is an urgent need of the formulation of dynamic tourism friendly policy and need of combined effort of the government and the private sector for the sustainable development of tourism sector.

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