

Vol. 5, No. 2, August, 2015

Bi- Annual

ISSN No. 2278-8379

# TOURISM INNOVATIONS

An International Journal of Indian Tourism and Hospitality Congress (ITHC)

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**Tourism Innovations: An International Journal of Indian Tourism and Hospitality Congress (ITHC)**

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ISSN : 2278-8379

VOLUME : 5

NUMBER : 2

**Publication Schedule:**

Twice a year : February-August

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***Published by:*** Bharti Publications in association with Indian Tourism and Hospitality Congress (ITHC)

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**Website: [www.indiantourismcongress.org](http://www.indiantourismcongress.org), [www.bhartipublications.com](http://www.bhartipublications.com)**

# Current Scenario of Kashmir's Tourism Industry-An Analysis of Issues, Opportunities and Challenges

Reyaz A. Qureshi

## ABSTRACT

*Tourism has emerged as one of the fastest growing industries in the world and has become a major and an integral part of economic, social and physical development. The Valley of Kashmir which abounds with rich natural, cultural and architectural assets of tourist interest is one of the most celebrated tourist destinations in India and has distinct prospects and potential of tourism. Kashmir tourism has seen encouraging trends in recent past and has been able to attract more number of tourists to its diverse and varied destinations.*

*Since the tourism industry in the valley of Kashmir occupies the predominant position in view of its commanding growth potential and plays an important role in the socio-economic development, this paper provides an analysis of the issues, opportunities and challenges to the Kashmir tourism industry. An attempt has been made to identify effective measures that would assist policy makers in future growth and development of the industry. The paper also presents some recommendations and suggestions that could be useful for sustainable development of tourism in the valley of Kashmir.*

**Key Words:** *Tourism, Sustainable development, Kashmir valley, Planning.*

## Introduction

Tourism is one of the world's largest industries and there can be no denying that tourism is a major global economic force. It is a principal catalyst of global economy and one of the most important tools for socio-economic development throughout the world. National and International tourism has grown substantially in recent decades, with technological improvements, rising living standards and broader processes of globalization leading to rapid increases in visitor numbers. Tourism has emerged as a key driver of socio-economic progress

through export revenues, the creation of jobs and enterprises, and infrastructure development. As per UNWTO (2015), International tourist arrivals increased by 4.3% in 2014, reaching a total 1133 million after topping the 1 billion mark in 2012. Travel & Tourism generated US\$7.6 trillion (10% of global GDP) and 277 million jobs (1 in 11 jobs) to the global economy in 2014 – 9.8% of total world GDP. Its growth of 3.6% was faster than the wider economy and out-performed growth in the majority of leading sectors in 2014.

Tourism is a complex industry; it provides

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employment opportunities and tax revenues and supports economic diversity. It has very different impacts, both positive and negative, or even mixed ones. However, from a national, regional or local planning point of view, tourism should support the development of the quality of life of residents too (Puczko & Smith, 2001). Tourism comes in many shapes and forms such as social, cultural, economic and environmental (Godfrey & Clarke, 2000). Tourism has been a source of social-economic change in many developing countries. According to the World Tourism Organization (2009), tourism is one of the world's fastest growing industries and is one of the global engines of development. The tourism industry is an important economic activity involving different groups of community. Tourism is a multi sector, and as a means of economic, social and cultural exchange, it has many aspects and types (Mowforth & Munt, 2003). Tourism growth provides significant economic benefits such as creating employment and additional income in both host countries and tourists' home countries (Delibasic et al., 2008). Realizing the contribution of tourism industry all countries throughout the globe are vying to secure the best share of tourism for themselves. States, regions, countries and even continents are looking at this industry to fight with their problems of unemployment, poverty and rural and urban development. Further to this, countries and regions are looking at tourism to improve their image so that they can attract large number of investors.

The valley of Kashmir located between the Karakoram and the Pir Panjal range in the state of Jammu and Kashmir enjoys an extraordinary place in the tourism map of India. The Almighty has been kind enough to this part of the universe by bestowing it with innumerable natural attractions and rich cultural heritage. Due to eruption of the

**Table 1**  
**Tourist arrivals in Kashmir during**  
**1988 – 2013**

Year	Home tourists	Foreign tourists	Total
1988	662097	59938	722035
1989	490212	67762	557977
1990	6095	4627	10722
1991	1400	4887	6287
1992	1175	9149	10324
1993	NA	8026	8026
1994	500	9314	9814
1995	322	8198	8520
1996	375	9592	9967
1997	7027	9111	16131
1998	99636	10247	109883
1999	200162	17130	217292
2000	104337	7575	111912
2001	66732	5859	72591
2002	24672	2684	27356
2003	192300	8959	201259
2004	358095	18634	376729
2005	585702	19680	605382
2006	412879	20009	432888
2007	417264	24576	441840
2008	551041	21588	572629
2009	577348	23904	601252
2010	710504	25984	736488
2011	1282360	32110	1314470
2012	1274674	37166	1311840
2013	1104000	30124	1134124
2014	1140446	27172	1167618

Source: Directorate of tourism, Govt. of J& K, Srinagar.

Political instability in the Kashmir valley the travel advisories of most foreign

countries later advised their citizens to avoid travel to Kashmir. Government of the Jammu and Kashmir has now placed emphasis on the tourism sector in view of its potential as a promising industry in the new millennium and has included the development of the tourism sector among its top priority.

As a result of improvement in political situation and the keen interest by the Government for tourism development Kashmir has been able to maintain a continues flow of tourists to the valley of Kashmir. There has been a remarkable increase in tourist arrivals from 2011 and the figure reached 1311840 in 2012. Due to protests after Afzal Guru Execution and uncertain political situation in valley during 2013 and devastating floods in 2014 respectively, there was a decrease in the tourist arrivals. The tourism sector has started showing remarkable resurgence with the return of peace and normalcy in the Kashmir Valley. The negative travel advisories have been withdrawn by many countries and emphasis is now on getting the industry back on track. The Kashmir government regards tourism as a priority sector from the viewpoint of achieving sustainable economic growth. With this back-ground, the aim of the paper is to investigate the issues, opportunities and challenges of the tourism industry in Kashmir. This analysis will provide policy makers with a clear picture of the industry and hence will help them to make appropriate policy decisions regarding the future growth and development of the industry. The analysis is based partly on a field survey carried out during May-September 2014 - where tourists, tourism stakeholders, concerned government and non government agencies and host population were interviewed using a structured questionnaire. The interviews were conducted at major tourist

destinations namely Dal Lake, Mughal Gardens, Gulmarg, Manasbal, Pahalgam, Sonamarg, Yusmarg and newly opened destinations Doodhpathri, Bungus, Gurez and Aharbal. The other part of the analysis is derived from official government documents.

### Structure of Tourism Industry in Kashmir

For the development of tourism the following government organisations are functioning in the valley:

- Directorate of Tourism, Kashmir.
- 10 Tourism Development Authorities at main tourist destinations.
- Jammu and Kashmir Tourism Development Corporation (JKTDC).
- Sheer-i-Kashmir International Convention Centre (SKICC).
- J&K State Cable Car Corporation (JKSCCC).
- Royal Spring Golf Course (RSGC).

All these organisations are working under the aegis of State Department of Tourism, which in turn is working in synergy with the Ministry of Tourism, Government of India, other State Governments and the private stake holders.

The Directorate of Tourism, Kashmir looks after the tourism activities in Kashmir Valley and Ladakh region and also regulates the tourist inflow and coordinates with the other related departments. The Directorate has the more important assignment of publicity and marketing the tourism resources of the state at national as well as international level. Jammu and Kashmir Tourism Development Corporation (JKTDC) undertakes commercial activities like construction of accommodation facilities, running cafeterias, restaurants and organisation of food festivals. JKTDC has

its own in-house Tour and Travel Division, which looks after reservation, sales and marketing of its properties. JKTDC has a fleet of luxury coaches meant for usage in the package tours offered to the tourists by its tour and travel division. Jammu and Kashmir Cable Car Corporation is responsible for construction of passenger rope ways and chairlifts in the state. The Gulmarg Gondola is run by this Corporation. For the integrated and focused development of identified tourist areas the government of Jammu and Kashmir has created 20 Tourism Development Authorities in the state out of which 10 are in Kashmir valley. These are for Gulmarg, Pahalgam, Sonamarg, Yousmarg, Doodpathri, Veerinag, Kokernag, Aharbal, Wular-Manasbal and Lolab-Bungus-Drungyari.

The major initiatives taken by government for the development of tourism in the state can be summarised as follows:

- Tourism in Jammu and Kashmir has been declared as an industry by the government in 1995 and a special package of incentive has been announced for the development of tourism infrastructure. This package of incentives will be available till 2015.
- Creation of tourism development authorities for integrated development of selected potential tourist destinations.
- Promotion and marketing of various destinations through the print and electronic media to boost tourist arrivals and diversify source markets, as well as for sponsoring participation of state's travel trade delegations in various travel trade fairs, marts and expos within and outside the country.
- Organization of familiarization tours of leading travel agents, tour operators, and travel writers from within the country and abroad to different parts of the state.
- New infrastructural development and up gradation of the existing and damaged infrastructure.
- Strengthening linkages with the rest of the economy by launching the scheme of conversion of residential houses into guest houses and development of rural tourism.
- Opening of new and lesser known tourist areas and development of infrastructure thereof.

### Incentives

Under the J&K Tourism Incentives Rules-2012 an individual, a firm, a public/private limited company would be eligible for incentive provided the project for which the incentive is sought has the prior approval in writing of the Director Tourism Jammu and Kashmir. The incentives available include:

- 30% capital outright investment subsidy on the fixed assets including cost of land for new tourism units. This subsidy is also be available for expansion of the existing units but is restricted on investment made on the extension of the unit only. However, subsidy on both accounts is restricted to an upper ceiling of Rs. 30, 00 lakh and will be available at the time of commissioning of a unit in the specified area.
- New unit investing Rs. 25.00 crore in fixed assets including cost of land in any area of state, will be treated as a 'Prestigious Unit' and a capital outright investment subsidy of Rs. 100.00 lakhs is given to it at the time of commissioning.
- 75% of the actual cost in the case of

non-polluting, noise-free diesel generating sets with a ceiling of Rs.4.00 lakh shall be reimbursed after its successful installation.

- 60% subsidy of the premium up to a ceiling of Rs. 50,000/- only for a period of two years for an entrepreneur to have a new tourism unit insured.
- 40% subsidy of the total cost of the project would be provided to house owners for conversion of their private houses into paying guest houses subject to ceiling of Rs.2.00 lakh in each case.
- 50% of the actual cost of the expenditure on the training of managers and other executives shall be reimbursed subject to the condition that such training courses are conducted by reputed institutions within the country with the prior approval of the government.
- 50% subsidy of the cost of specified adventure/recreation equipment, subject to a maximum of Rs. 7.00 lakh as a onetime measure would be available for establishment of equipment store duly registered with the tourism department.
- 50% subsidy up to a limit of Rs. 1.00 lakh in each case shall be available to registered tourism projects for the purchase of equipment related to the of kitchen, health and hygiene related facilities.
- 50% subsidy for the replacement/purchase of new tourist coaches, with a ceiling of Rs.7.00 lakh, shall be available to Jammu and Kashmir state permit holders plying their coaches on recognised tourist routes for transport of tourists.
- A subsidy of Rs.2.00 lakh shall be available for providing air-

conditioning and for getting toilets/urinals retrofitted in existing tourist coaches in new tourist coaches purchased and operated by permit holders of J&K state plying their coaches on recognised tourist routes.

- 50% subsidy of the cost of office automation/communication networking/computing system and other equipments with a ceiling of Rs.4.00 lakh would be reimbursable to travel agencies registered with tourism departments for up gradation of existing travel agencies in the tourist areas specified in the list as a onetime measure.

### Critical issues in Kashmir Tourism

In light of the important role that the tourism industry plays in the Kashmir economy the government should have drafted a tourism policy for proper tourism development. But till now the Ministry of tourism, Government of Jammu and Kashmir has not formulated any tourism policy. Jammu and Kashmir is the only state in the country which is without a tourism policy. Keeping in view the present scenario of tourist inflow to the valley and the competition with other states, it has become very important for the state government that they should come up with a Tourism Policy that will provide guidelines for the tourism sector. Mill and Morrison (1992) and Hall (1994) suggested that the government could play various roles in planning, coordinating, controlling and implementing national tourism policies. Moreover, in a developing country where resources are scarce, an active role by the government in the development of tourism is essential (Jenkins and Henry, 1982), although deregulation and liberalization are important to ensuring a well-organized and developed private sector.

In a developing country where resources are scarce, it is essential for a government to take an active role in the development of tourism (Jenkins and Henry, 1982). Without active government involvement, it is unlikely that a tourism industry would be able to formulate a series of actions that foster and promote the development of tourism. The need for the policy arises because tourism is a multidimensional industry and involves various players in producing the tourism product, both in public and private sector. In order to direct the development of tourism at a destination there has to be a policy with identified targets and a plan to achieve them. This is more so necessary in order to maximise the benefits, remove or prevent the negative impact of uncontrolled mass tourism and go in for sustainable development. Every developer has a tendency to make decisions on development with reference to its own role. Therefore, in order to avoid conflict among actors and also to ensure the optimum utilisation of resources, the policy has to lay down a coordinated framework of objectives so that the actors work out further details along the lines. Another important task to be accomplished through a sound and effective policy is to balance the demand and supply of the tourism industry. Depending upon the potential of the tourism activity in the area, the priority areas and projects need to be identified for development (supply side) and the marketing strategy (demand side) has also to focus on the relevant tourist group only. The situation of imbalance could be the tourist expectations aroused due to generic publicity of the areas and tourists from all segments like adventure, pilgrimage, sight-seeing, nature lovers visiting the area with their own agenda and returning dissatisfied due to the non availability of facilities. Equally

undesirable scenario would be a situation of excess supply when the infrastructure is created but due to lack of promotional efforts to the right segment, there is under utilisation of capacity.

As the process of creation and utilisation of capacity generates socio-economic and environmental effects, the policy has to aim at balancing the number and activities of the tourists and the capacity of the resource system to support them without degradation of the resources that make the tourism product. These roles will vary according to the situation and needs of the industry

Due to the absence of tourism policy unplanned infrastructural development is going on throughout the valley which results to various ecological problems. In Kashmir valley tourism has developed without planning. Three decades of such development increased tourist arrivals and foreign exchange receipts but led to serious environmental and socio-cultural problems and the degradation of the tourism product.

Tourism has developed in Kashmir without proper planning. Essentially, tourism has grown with government encouragement and private sector participation but without a blueprint on the type of tourism desired, growth rate control, and consent by local communities which are the arenas for guest-host interactions. Lack of planning soon leads to serious environmental and socio-cultural problems. Tourism becomes uncompetitive and is ultimately unsustainable. Hill stations and lakes of Kashmir are examples of tourism development without a plan. Consequently, serious difficulties threaten further development. The hill stations of Gulmarg, Sonamarg and Pahalgam have become congested, the physical

infrastructure has broken down, and local communities are up in arms with the authorities on revenue. The rationale for tourism planning is threefold: developing and managing tourism in an integrated, controlled and sustainable way; generating optimal benefits for the stakeholders; and minimising environmental and socio-cultural problems (Inskeep, 1994). Although many countries prepared tourism plans in the 1960s and 1970s it was not until the 1980s when international recognition was given to the role of tourism in development and the need to include tourism in national planning (Inskeep, 1991; de Kadt, 1979). Planning provides the rationale for utilising relatively large financial resources from a country's treasury. Such resources are required to develop infrastructure such as airports and hotels. As resources are frequently in short supply in Africa, there must be prior planning and policy justification for the development of tourism.

Only planning can guide the type of tourism desired, the respective roles of the government, the private sector and local communities, and the source markets of the tourists (Inskeep, 1994). This is the approach of integrated tourism planning which also recognises local interests in tourism development (Murphy, 1985; Gunn, 1988; Inskeep, 1991; 1994). Without local support and involvement in the planning, development and implementation of tourism projects, medium- and long-term tourism activity would be impossible. True local participation as a partnership with the national and international interests can help sustainable tourism development. It is only governments which have the power to provide the legal and financial framework which tourism requires.

## Opportunities

### *Nature of Kashmir's tourism product.*

Kashmir is internationally renowned for its natural beauty, rich cultural heritage and its hospitable people. The valley has been paradise for tourists since ages and has been a traditional haunt for lovers of beauty and adventurous travelers. Kashmir as a tourist destination offers the maximum opportunities for entertainment, enjoyment, adventure and travel. Historians, Kings, Poets and travelers had praised the natural beauty of Kashmir. Kashmir's greatest historian Kalhan writes about his native land: "It is a country where the sun shines mildly, big and lofty houses, learning, Saffron, icy cool water and grapes rare in Heaven are plentiful here - Kailash is the best place in the three worlds (Tri-lok), Himalayas the best place in Kailash, and Kashmir the best place in Himalayas".

Renowned Sanskrit poet Kalidas writes about the valley: "The place is more beautiful than the heaven and is the benefactor of supreme bliss and happiness. It seems to me that I am taking a bath in the lake of nectar here. Sir Walter Lawrence writes "The valley is an emerald set in pearls; a land of lakes, clear streams, green turf, magnificent trees and mighty mountains where the air is cool, and the water sweet, where men are strong, and women vie with the soil in fruitfulness." He further writes that the valley contains everything which should make life enjoyable. There is sport varied and excellent; there is scenery for the artist and the layman, mountain for the mountaineer, flower for the Botanist, a vast field for the Geologist and magnificent ruins for the archaeologist. Praising the beauty of the valley the Mughal Emperor, Jahangir, said,

"If there is ever a heaven on earth, it's here, it's here, it's here".

Kashmir contains relatively abundant, lush green forests, mountain ranges, enchanting geographical landscape, lakes and pleasant climate which apart from providing a good scenic view are an attractive source of sporting activities and has the Potential to cater almost all tourist tastes.

#### ***Research for Promotion and Marketing:***

The expansion of the tourism industry in Kashmir calls for up to date, appropriate, comprehensive, reliable and timely statistics for policy analysis, market research, budgetary allocation and programme development and management. The department of tourism is only compiling the tourist data of tourists visiting the valley from other states and countries only. Except for Gulmarg and Pahalgam resorts no statistical data is being maintained about the tourist arrivals at various tourist destinations of the valley. No research is done about tourist carrying capacity, environmental impact assessment, the economic impact of tourism, its environmental consequences and the potential for ecotourism development. Tourism industry and its products needs effective marketing decisions so as to match these decisions with the changing needs and result in the balance between demand and supply. In recent years the number of visitor arrivals has increased with various ethnic compositions hence research into the characteristics, behaviour, preferences and expectations of these visitors is crucial, as it will reveal the different needs of different nationalities of tourists. The results of this research will be useful in infrastructure planning, product

development, service provision and marketing. Further-more, the fact that tourism industry of Kashmir is on the revival stage and is competing in the national and global market for its share of tourists means there is a need for more analytical and qualitative studies concerning the perceptions, expectations and satisfaction of tourists, and more extensive surveys into the lifestyle oriented leisure activities of the foreign market. A research in the area of determinants of demand and visitor expenditure pattern is pertinent to the types of campaigns and programmes to undertake. The more we know about visitor spending profiles the greater are the opportunities for increasing the cost effectiveness of initiatives by the department of tourism government of Jammu and Kashmir. Undertaking of greater promotion and marketing campaign will assist in achieving higher tourist arrivals in Kashmir.

#### ***Increased Demand for Nature:***

Nature with its full glory and diversity has always been captivating to man. Realizing the uncompensated catastrophe that modern tourism generates, the patagonists of sustainable development emphasize the need for making resilience to nature. The growing concern among tourists for cleaner environment has fostered a strong desire on them to share the experience at destinations well known for their natural and cultural attraction. No wonder, after many decades of mass tourism concomitant with industrial revolution and deteriorating ecosystem, today the option is nature/eco-tourism, viz tourism basically depending on natural attractions in pollution free environment. Now a day's people are becoming less

interested in traditional vacations and instead want to travel new destinations, including remote and exotic places. The nature based tourism is and will be the fastest growing trend in the world wide tourism industry. The interest in natural areas can be attributed to change in life style, development of better technologies, and trend among people seeking refuge from the high pressure pace of living, finding escape in natural environment. The nature of Kashmir offers varied attractions to the tourists who always make Kashmir a land of great fascination and charm. Due to its rich nature based resources which is the USP of Kashmir, the development of ecotourism has huge potential and importance. The search for an alternative to mass tourism is fostered by the growing concern for environment, global environment movements and fast deteriorating ecosystem that supplement the ecological balance. The several alternative forms to mass tourism in Kashmir can be wildlife tourism, adventure tourism, health tourism, rural tourism, ecotourism, nature tourism, green tourism and farm tourism etc. These forms of nature based tourism offers numerous prospects to potential entrepreneurs, mainly the indigenous people. Its major strength draws from the fact that it truly blends with the Kashmir's rural structure and provides a unique opportunity for rural population to participate in the tourism activities. Kashmir's natural environment combined with its distinctive cultural heritage will give Kashmir an added advantage in its pursuit for ecotourism development.

#### ***Niche Markets:***

Niche market include catering to special events, study missions like ecotourism,

sport and leisure like jet set golfers and tapping the youth travel market in educational and cross country exposure trips (Chiang, 1999). For Kashmir there are growing opportunities for increasing visitor arrivals by tapping the specialised markets such as health tourism, honeymoon tourism and MICE tourism. There is also this opportunity of growing specialised markets especially those where Kashmir has a natural resource base and competitive advantage such as skiing, ice-skating, trekking, mountaineering, hot air ballooning, white water rafting, golfing and angling. The youth travel market especially in the area of education can also be targeted by signing memorandum of understandings with various Indian and foreign universities for student exchange programmes and reservation of seats for outside students in various international professional programmes in various universities of Kashmir.

#### ***Development of Tourism Culture:***

Development of tourism culture at tourism destinations is the pre requisition for the successful tourism. In this regard there is dire need of tourism awareness among the host population. The concerned authorities need to conduct special awareness and training programmes to sensitise the host population and especially the stakeholders. These awareness and training programmes need to be conducted at both the primary tourist destinations as well as in the areas indirectly related to tourism trade. Through such measures the authorities will succeed in incorporating a responsible and tourist friendly mindset among the stakeholders and host population. Besides the host population will be apprised regarding the impacts of tourism and its contribution

in overall socio-economic development and role of tourism in conservation and international understanding.

### Challenges

The major challenges which the tourism industry of Kashmir is facing at present may be summarised as follows:

#### **Lack of proper infrastructure:**

Provision of proper tourist infrastructure at tourist destinations is the pre requisition for the overall tourism development. Although the term infrastructure refers to all resources required for the establishment of an organisation, we normally use it to refer to some components of the economic infrastructure. These are public works and transport, public utilities such as power, telecommunications, water, sanitation and sewage and solid waste collection and disposal (World Bank, 1994). Lack of adequate and efficient utility supplies and under-developed infrastructure in case of transport and accommodation is an obstacle in the tourism development of the valley. The National Highway 1A (Srinagar-Jammu) via Banihal is the only road connecting the valley with rest of the world. This road accounts for more than 80 percent of the total passenger traffic. This road remains mostly blocked due to landslides, rain and snowfall and causes much inconvenience to the visiting tourists. Although a new road namely "Mughal Road" is being constructed as an alternative highway for the valley of Kashmir but its pace of development is very slow. The poor conditions of roads connecting the valley's tourist attractions and the traffic jams causes much inconvenience and displeasure to the visiting tourists. The present research

indicates that tourists are unhappy about the condition of roads and heavy traffic jams enroute to various tourist destinations of the valley. The road connecting Srinagar with various tourists' destinations like Yousmarg, Sonamarg, Manasbal, Gurez, Lolab, Bungus, Doodpathri, Veerinag, Kokernag and Aharbal has seriously deteriorated because of low maintenance standards and consequently results to uncomfortable and prolonged travel.

Government of India in the year November 2002 started the construction work for extension of railway link from Udhampur to Qazigund and the project was supposed to be completed in August 2007 but the slow pace of work and lack of adequate funds from the central government has been coming in its way.

International tourism in the valley of Kashmir has received a serious setback due to absence of international airport. Though the Srinagar airport had been declared as an international airport but presently no international or chartered flights are operating from here. Provision of international flights to and from Srinagar will pave way for attracting the foreign tourists to this part of the world.

Lack of adequate accommodation for varying tastes at various destinations is also one of the major challenges for the tourism industry of Kashmir. There has been increase in the bed capacity at Srinagar and Pahalgam but many other destinations of the valley like Gulmarg, Sonamarg, Manasbal, Yousmarg and Aharbal have short of accommodation. Besides, many other tourist destinations like Daksum, Veerinag, Doodpathri, Lolab, Bungus, Gurez and Dachigam are such where either no accommodation is

available or very little or insufficient accommodation facilities are available.

Lack of basic amenities like water and electric supply, telecommunication facilities and destination specific services like adventure and rescue equipments for adventure activities and knowledgeable guides at wildlife destinations and heritage cites of the valley of Kashmir adversely effects tourist movements.

### **Environmental Impacts:**

Mountain areas, as distinct from other physiographic units, have certain objective conditions or specificities (Jodha 1991). These conditions of inaccessibility, fragility, diversity, 'niche' or comparative advantage, and marginality add a particularly critical dimension to tourism in the mountains and call for particular ways of responding to the objective conditions. (Jodha 1991 and Sharma 1994). Although mass tourism leads to the over utilisation of the extant resources, the problem is worsened by the heavy concentration of tourists in the lakes and hill stations namely Dal lake, Amarnath cave, Gulmarg, Pahalgam and Sonamarg which are most popular with visitors visiting the valley. Dal lake is one of the prime tourist attractions and an important tourism component of Kashmir's tourism industry. As a consequence majority of the establishments that cater to tourists are located in and around the lake. Spontaneous and unplanned tourism infrastructural development as well as increased tourism activities, in and around the lake have taken a toll of the lake's recreational and scenic values. The degradation of the lake ecology, environment and assimilative capacity of the lake are the major tourism led, development induced activities that are

impacting the environmental carrying capacity.

The flow of pilgrims to the holly cave of Amarnath situated at an altitude of 3888mts has been increasing continuously over the period of time which has resulted to ecological imbalances and environmental degradation of this mountain eco-system. During the year 2012 above 6.5 lac pilgrims visited the cave, during peak time over 20,000 pilgrims are at the cave against the recommended 3000 per day, plundering the glaciers. Geologists have time and again raised the fears of environmental degradation, ecological imbalance and adverse impact on the Nehar glacier, situated at a height of 4,200 meters around Baltal near Sonamarg, from the heavy rush of pilgrims. The ecology, the environment and the health of the glacier can be under severe threat if the Baltal route to the holly cave is frequented by thousands of pilgrims (The Tribune July 5,2005). The forest land handed over to Shri Amarnath Shrine Board (SASB) at Baltal near Sonamarg houses the Nahar and Thajiwas glaciers. Environmentalists have often raised concern that apart from the sewage generated by pilgrims, they also throw tons of non-biodegradable items made from polythene and other plastics in the water resources in the mountain area. This has resulted in the deterioration of water quality. Ironically, while central government has taken tough measures restricting the tourist and pilgrimage traffic to save the Gangatic glaciers, it tends to side step the Kashmir glaciers, which are source of water for Indus and Jhelum. Unfortunately the central government overlooked a report prepared by Dr Nitish Sengupta in 1996 asking for regulating Amarnath-bound

pilgrims to preserve the fragile ecology and environment of the region. It is interesting to note that the government applied Dr Nitish Sengupta's report in Gangotri in Uttarakhand, where in May 2008 they issued a notification restricting the number of pilgrims and tourists to 150 a day to Gomukh, the origin of the Holy river Ganges. Gomukh is as holy a shrine for Hindus as Amarnath in the southern mountains of Kashmir. To save this ecologically fragile mountain region from environmental deterioration there is immediate need of regulating Amarnath bound pilgrims.

In case of the Dal lake, hill stations of Gulmarg, Pahalgam, and Sonamarg and Amarnath cave carrying capacities have been exceeded. As a result, these destinations are facing increasing environmental deterioration are losing their visitor appeal. Since the valley of Kashmir depends heavily on tourism for its development, there are intense economic pressures on the people to over exploit their natural resources which have resulted to ecological and environmental degradation. However, when the only way to obtain the meal is to mine the available natural resources, the area is going to lose. If we have to save our precious ecology and environment, the authorities must provide people with alternatives to destruction.

#### ***Political Instability:***

Political instability in the valley of Kashmir has all along inhibited the growth of tourism in the region, the industry, however, suffered a great blow with the outbreak of armed struggle in 1988. The resultant political disturbance stopped the potential tourists from visiting the valley of Kashmir. The tourist traffic during this

period has fallen from heights of sky to the ground touching the zero level as shown in the table-1. The travel advisories of most foreign countries later advised their citizens to avoid travel to Kashmir, in light of the instability in the valley. The political instability has been the prominent obstacle and irritant to the smooth functioning of tourism industry in the valley which has prolonged the growth of tourism industry and it would take a long period for the industry to enjoy a pre 1988 business. Investment in tourism industry in Kashmir is regarded as having the highest risk as compared to investment in other sectors. The high risk is mainly due to cyclical nature of tourism business which is highly correlated to various volatile external and internal factors such as economic performance of source and destination markets, cost of imported goods, variation in exchange rates, dependence on vulnerable transport and communication systems, impact and frequent incidences of natural disasters and above all the political uncertainty in the valley.

#### ***Competitiveness:***

Kashmir tourism is meeting with stiff competition with other north Indian states especially with Himachal Pradesh and Uttarakhand. During the last two decades of political instability the tourists moved towards these states that have over the time developed good infrastructure to cater the increasing demand of the tourists and had also diversified their tourism products. To cope with the competition, Kashmir needs to upgrade its infrastructure and the quality of its tourism product, and conduct an aggressive promotional and marketing campaign both within and outside the country. The

tourism promotion and marketing efforts made by the ministry of tourism government of Jammu and Kashmir in association with the private travel trade for the revival of tourism both at home and overseas has brought fruit full results in the recent past. Also Kashmir's reputation as a tourism destination is passed on by word of mouth by people who have already visited the valley. Kashmir's varied ecology, environment and natural beauty are also subject of many documentary films, books and magazine articles. These provide free publicity to the Kashmir tourism. But all these are no longer sufficient for the valley of Kashmir to maintain a competitive edge. Department of tourism, government of Jammu and Kashmir has tourism offices in Delhi, Mumbai, Chennai, Hyderabad, Kolkata and Ahmadabad. These offices can serve as a best tool for promotion and marketing of Kashmir tourism if their scope of activities is increased and budget allocation for them is enhanced. Domestic tourism has always been more significant than international tourism to the valley of Kashmir. The large number of tourists visiting the valley originates from, Maharashtra, Gujarat, West Bengal, Delhi and Uttar Pradesh. The study shows that major tourist generating market for Kashmir is West Bengal, Maharashtra, Gujarat, Delhi and Uttar Pradesh. The uneven spread of tourists indicates the inadequacy of promotional efforts of the department of tourism to attract large number of visitors from different parts of the country.

The place of origin of Kashmir bound tourists is wide spread as the globe itself. In the beginning Europeans were the major market for Kashmir. With the betterment in means of transportation, Kashmir became more accessible and tourists from different parts of the world started visiting it, including as diverse as countries Australia, Austria, Belgium, Canada, Denmark, France, Hong Kong, Italy, Japan, Singapore, Malaysia, Thailand, the Netherlands, New Zealand, South Africa, Spain, Switzerland, U.K, USA, and Germany. During the last decade there has been increase in the tourist arrivals from Hong Kong, Malaysia, Singapore, UK, USA, and Israel. This market needs to be diversified to insure the stability of tourist flow. The tourist market (Japan, Korea, Australia and New Zealand) and the Middle East have not been exploited.

Another strategy for increasing Kashmir's competitiveness is provincial cooperation within the state of Jammu and Kashmir. Provincial cooperation is intended to encourage the movement of tourists across the three provinces of Jammu and Kashmir and to establish joint packages for multi-destination travelers. At present the tourist traffic to the shrine of Vaishnu Devi is above 11 million and the distance between Katra and Kashmir is just 266km's. Besides this after the operation of direct flights to Ladakh from Delhi the foreign tourist traffic to this province has increased manifold. The provision of intra province tourism by establishing joint packages for multi destination travel can give boost to tourism in Kashmir.

**Table-2**  
**SWOT Analysis of Kashmir Tourism**

Strengths	Opportunities
<ul style="list-style-type: none"> <li>· Innumerable natural resources.</li> <li>· Pleasant weather.</li> <li>· Various kinds of tourism available to be exploited.</li> <li>· Base/terrain for various adventure tourism activities.</li> <li>· Famous for tourism since ages and a known tourist destination.</li> <li>· Experienced people due to past tourism booms.</li> <li>· Rich cultural heritage and religious harmony.</li> <li>· World class handicrafts</li> <li>· Archaeological and historical places.</li> <li>· Hospitable people.</li> </ul>	<ul style="list-style-type: none"> <li>· Increased disposable income of various classes of people.</li> <li>· Potential of Kashmir to cater almost all tourist tastes.</li> <li>· Increased demand for nature.</li> <li>· Development of unexplored and lesser known areas.</li> <li>· Scope to develop adventure, health tourism.</li> <li>· Scope of making the tourist spots more attractive.</li> <li>· Research and development to attract more tourists.</li> <li>· Development of tourism culture.</li> <li>· Promotion and marketing.</li> </ul>
<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>· No tourism policy.</li> <li>· Unplanned infrastructural development.</li> <li>· Tourism stress on few developed destinations only.</li> <li>· Lack of investment.</li> <li>· Lack of hygiene.</li> <li>· Poor connectivity with rest of the country.</li> <li>· Poor promotional and marketing activities.</li> <li>· Lack of coordination between different agencies.</li> <li>· Lack of trained human resource.</li> <li>· Lack of proper research.</li> <li>· Limited availability of tourist information offices in potential tourist generating market.</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>· Absence of proper tourism policy.</li> <li>· Environmental degradation.</li> <li>· Political Instability.</li> <li>· Harassment by the security agencies.</li> <li>· Diversion of tourists to neighbouring states.</li> <li>· Strong competition within the region.</li> <li>· Lack of awareness among the mass people regarding the benefits of tourism.</li> <li>· Shortage of sufficient accommodation, food and beverage services and other amusement services and night tourism.</li> <li>· Negative media coverage.</li> </ul>

**Suggestions and Recommendations:**

The following suggestions and recommendations are made on the basis of the present research and the present scenario of tourism industry in the valley of Kashmir:

**1. Formulation of Tourism Policy:** For the overall sustainable tourism development formulation of proper tourism policy for the state of Jammu and Kashmir is essential. The important elements of the much desired tourism policy are recommended as follows:

- Tourism development should be integrated in to the overall development policy, planning and strategy of the region.
- It should be planned and organised systematically so that it does not result in serious ecological, social and economic problems.
- All ancillary services should be designed to reflect and represent Kashmir's distinctive architecture styles and local material.
- It should be put on operation in an efficient and integrated manner to meet the needs of national and international tourists.
- Emphasis should be placed on employment of local persons and be given maximum opportunity for career development and job satisfaction.
- The local population should be educated so that they could understand the importance of tourism and its role in area's economic development.

**2. Infrastructural development:** Transport is one of the primary components of tourism industry and lack of convenient and comfortable transport make the

tourists visit tiresome and uncomfortable. In view of this, the whole transport system in the valley, both air and surface transport need to be developed properly as per the need of the hour. The authorities should make all efforts to ensure the modernisation of the Srinagar-Jammu highway and should speed up the construction work of Mughal road that will enable the valley to have a round the year tourist traffic. Roads connecting various tourist destinations need to be improved immediately with provision of way side amenities for the visiting tourists. The railway authorities should also speed up the construction work of Udhampur-Banihal railway track and special funds should be making available for this important project to give stimulation to the tourism industry of the valley of Kashmir. The international air transport services should be operated from and to the Srinagar airport with provision of night landing facility for both domestic and international flights.

**3. Construction of Adequate Accommodation:** Construction and development of different classes of accommodation to cater the demand of both high end and budgetary class, especially at the new coming tourist destinations and at the traditional destinations having either no are little accommodation. At the hill stations the new accommodation by way of hutments and tented accommodation should be encouraged and extended in conformity with the local environs. In addition, accommodation units should be encouraged to purchase locally made products that can be efficiently produced domestically such as hotel furniture and food ingredients. In light of the high leakage of tourism earnings, it is recommended that the government identify appropriate support services

pertinent to the tourism industry to minimise the leakage factor. Agro based products for example will reduce imported food content. The authorities should also work in partnership with the private sector to set up appropriate support services which will further increase linkages with the rest of economy.

Besides, in view of emergence of budgetary and youth tourist traffic setting of tourist villages and camping sites at appropriate places with reasonable comforts is required to be considered and provided. For the speedy development of lodging and boarding facilities at newly opened tourism destinations private sector should be encouraged to come forward and the government must lease land to them and arrange fiscal benefits, facilitate imports and provide marketing and training opportunities.

**4. Regulating Tourist Flow:** The mountain regions of Kashmir especially the hill stations of Gulmarg, Sonamarg, Pahalgam and the holly cave of Amarnath receives lakh of tourists every year. Unfortunately, most of these places lack adequate facilities of transport, accommodation, waste disposal and other amenities for the ever growing number of tourists and pilgrims. Also, there is a gross lack of regulatory mechanism for infrastructure creation, management, and for controlling the tourist inflow in such sites. As a result the sensitive ecosystems and cultural values of these areas are facing pressures far beyond their carrying capacities. There is an urgent need to develop and implement guidelines for sustainable pilgrimage in the region encompassing the concept of carrying capacity of the area and adoption of "best practice" norms on the pattern of regulation of tourist traffic to Gomukh in Utrakhand and appropriate land-use planning for infrastructure construction to avoid or

minimize damage to sensitive ecosystems and despoiling of landscapes.

**5. Promotion of Sustainable Tourism:** Sustainable tourism enhances and preserves our natural and cultural heritage and improves Kashmir's quality of life. Tourism development needs to balance economic viability, environmental conservation and social impacts. Sustainable tourism endeavours to minimize environmental and cultural impacts while contributing to economic development. The long-term success of the industry depends on business owners and operators being stewards of the environment and adopting quality practices. Promotion of sustainable tourism through adoption of "best practice" norms of eco-friendly and responsible tourism, creation of appropriate facilities and access to ecological resources, and multi-stakeholder partnerships to enable local communities to gain livelihoods, while leveraging financial, technical, and managerial capacities of investors. All players in tourism like government, non-governmental organizations, tourism industry and the tourists have to do their bit to promote sustainable tourism. Inskeep (1991) discuss the role of various actors in tourism process and suggest the following actions.

- a) The government should:
  - Promote and undertake area and sector specific research into the environmental, cultural and economic effects of tourism,
  - Support the development of tourism economic models to help define appropriate types of economic activities,
  - Develop standards and regulations of environmental and cultural impact

assessment,

- Design and implement the public consultation strategies,
  - Design and implement educational and awareness programmes.
- b) The non-government organisations should do the following:
- Should take part in tourism planning process.
  - Should continue to seek local support for tourism development.
  - Should become more involved in public education.
  - Should undertake local research and data collection and offer information to other agencies.
- c) The tourism industry should undertake the following activities:
- Protect the biosphere,
  - Sustaining the use of resources,
  - Reducing and disposing the waste by recycling and reusing,
  - Adopting energy saving devices,
  - Incorporating environmental values in management operations,
  - Providing complete and credible information to the tourists.
- d) The individual tourist should:
- Learn to respect human and natural heritage,
  - Adopting environmentally responsible tour operator,
  - Refrain from purchasing the products and services which endanger the environment,
  - Follow environmental regulations,
  - Supporting conservation activities.

## 6. Development of Ecotourism:

Operationalization of ecotourism in various modes, such as village tourism, nature tourism, wildlife tourism, trekking/adventure tourism, and cultural tourism in the valley and institutionalization of tourism management at the community level may be useful. For ecotourism promotion the following approach should be adopted:

- 5-Star approach in respect of hospitality industry should be replaced by home stay approach to promote mountain tourism.
- Eco-tourism villages, parks, sanctuaries and other areas should be identified to establish a primary base for ecotourism.
- Village communities, especially youths, and rural women should be involved in Ecotourism.
- Restriction should be placed in terms of visitors per day/ per group to the eco-tourist sites in order to minimise adverse impact and maintain the sustainability of the eco-tourist destination.
- Restrictions on the entry of vehicles should be imposed in sensitive ecological sites.
- Fund raised should be used for basic resources, eco-tourism element conservation, and education and awareness campaigns for visitor/ host community sensitization.
- Incentive structures should be developed by according specific roles to the locals in management of tourism and allied industries. Their capacity building in different segments of the enterprise should be built so that they feel involved and react in a responsible manner.

- Local art, crafts, cuisines, and dishes should be promoted and made an integral part of tourist experience in order to ensure that most benefits go to locals and, at the same time, their cultural integrity/ entity is not lost in the face of acculturation and cultural drift.
- It should be mandatory for expedition to remove and take out the garbage, refuse and particularly the non-degradable materials. Expeditions should be asked to leave a deposit as security with an appropriate authority to ensure that the regulation is met.
- Best practices on commercial trekking should be imposed on a mandatory basis in consultation with institutions having the necessary expertise and Government approval.
- Interactive websites relating to mountain access, trails, availability of facilities should be set up which should also provide the facility of online request, approval for visit to parks, restricted sites and payment of fees, etc.
- Creation of log/ wooden huts should be promoted in busy mountain areas.

**7. Promotion and Use of Local Art & Craft:** Promotion and use of local art & craft cuisines, etc., along with organizing tourism fairs and festivals will boost tourism in the valley and will provide the visiting tourists an opportunity to experience the rich cultural heritage of Kashmir.

**8. Promoting Awareness:** There is a strong need for promoting awareness both among local communities and visitors about various issues pertaining to the specificities and sensitivity of the Kashmir environment. Effective use of media and

imparting training through informal conservation education is required. Various research organizations and NGOs from the region can play important role in this context. Apart from awareness and inculcating interest among school and college students, the programme subsequently needs to attract and motivate other stakeholder groups. In particular, there is a need for designing a special course on "Kashmir Ecology and People" and making it mandatory for those serving the region as administrators, natural resource planners, policy makers, and military & paramilitary forces, etc. The Institutions mandated for Kashmir Research & Development need to be strengthened to design and implement such courses in collaboration with Institutions of higher learning and Administrative Training Centres.

**9. Political Stability:** Kashmir government should give high priority to restoration of political stability in the valley. The Kashmir problem calls for the national and international efforts for the final resolution of the problem. Appropriate measures need to be undertaken for creating sense of security and confidence among the local population. Besides, the government and department of tourism should counter the negative publicity campaign carried out by the outside print and electronic media and made all possible efforts to stop negative publicity regarding Kashmir tourism.

**10. Promotion and Marketing:** Kashmir tourism must consider the effective use of the Information technology for the promotional activity of this industry. For this purpose an effective system of communication and proper media planning is required. Large scale advertising through national and international print and electronic media, tourism literature,

installation of attractive hoardings at airports and railway stations at metropolitan cities is direly needed for the promotion of Kashmir tourism.

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