



Impediments to Development of Tourism Industry in Jammu and Kashmir

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Abstract

The Jammu and Kashmir region of India is richly endowed in resources that could support a major tourism industry yet the industry has not grown significantly. This paper examines the current situation of Jammu and Kashmir's tourism based on analysis of various secondary sources including government records, news articles, corpus of academic papers and discussions with industry players. Tourist arrivals in Jammu and Kashmir have remained low compared to other states in India due to various impediments are undermining the competitiveness and sustainability of Jammu and Kashmir's tourism industry. Tourism crisis which in the current century have generated new uncertainties and tensions in the region is one of the major impediment and is discouraging both tourists and investors. Additional barriers relate to lack of adequate Infrastructural support, lack of training at the "cutting edge", insufficient involvement by the private industry in tourism development, over charging of services, lack of hygiene, lack of website, lack of comprehensive and social media coverage. The paper argues that the trend in tourist arrivals will likely continue downward if urgent and drastic measures are not taken by the Government and other stake holders in the industry to improve the security situation, provide tourism facilities and embark on aggressive image laundry strategy such as destination positioning. And therefore provides a road map for some of the initiatives that government and industry could adopt.

Keywords: Jammu and Kashmir, Impediments, Tourism and Tourism Development.

Introduction

Tourism, the generic concept, is defined as the travel for entertainment, and offering all services relating to this activity (World Tourism Organization, 2007). Urry (1990) described tourism as experience and as a free-time activity that contrasts with the daily routine. The literature describes the concept through various perspectives and understanding. Turner and Ash (1975) suggest that tourism allows individuals to consider things/events from a different outlook such that the daily norms and values of an individual's life are deferred during the travel period. British Tourism Association defines tourism as the activities related to short term travel of an individual from outside their home place, and their activities through the trip (Lumsdon, 1992). Coltman (1989) defined Tourism as "*a short term journey, which starts from one point and finally ends there. And during the journey, several or many places are visited according to the program, and great amounts of foreign currency*

which tourists pay, go to the host country.”

Tourism is one of the largest and fastest growing economic industries in the world. The growth of the Travel & Tourism industry in 2015 (2.8%) outpaced that of the global economy (2.3%). In total, Travel & Tourism generated US \$7.2 trillion (9.8% of global GDP). The WTTC has identified India as one of the world's foremost tourist growth centres in the coming decade. The industry is predicted to grow at an average annual rate of 7.5% to (US\$270 billion) by 2025 (7.2% of GDP). India earned US\$21.07 billion in foreign exchange earnings from tourism receipts in 2015 (WTTC, 2015). The tourism industry in India has come a long way from just 15,000 tourists in 1950 to 1637.62 million in 2016 (Indian statistic report, 2017) Although Jammu and Kashmir is the most beautiful tourist destination in India, much of this traffic is concentrated in other states like Tamil Nadu, Uttar Pradesh, and Andhra Pradesh, Karnataka, Maharashtra, Tripura, Madhya Pradesh West Bengal, Gujarat, Rajasthan. The statistical figures in *Table 3* are an empirical evidence to justify low patronage in terms of total tourists visit to a region. Tourism in Jammu and Kashmir has had difficult times over the years. There appears to be various impediments that may be undermining the competitiveness and sustainability of Jammu and Kashmir's tourism industry and therefore raising the concern of key stakeholders.

This paper is divided into four sections. It begins by describing tourism in Jammu and Kashmir during the last two decades, including statistics on Jammu and Kashmir rank in India, tourism flow and the main trends in the last twenty years. The paper then outlines the impediments to tourism development in Jammu and Kashmir and followed by the existing paradox and closes with the suggestions for policy makers.

Objectives

The present study aims to achieve the following objectives:

- i. trends in Jammu and Kashmir's tourism industry over the two decades .
- ii. impediments that may be undermining the competitiveness and sustainability of Jammu and Kashmir's tourism industry.

Methodology

To accomplish the objective proposed in this work various documents: a combination of government publications; newspapers; online resources; magazines; academic journals and books on Jammu and Kashmir tourism have been examined. The authors have also relied on email communications with industry players. Author compiled tourism statistics from 1997 to 2016 with a goal of finding no of domestic and foreign tourist visits to Jammu and Kashmir for this period. The following databases were searched:

1. Ministry of Tourism, Government of India,
2. Department of Tourism, Jammu and Kashmir,
3. Indian statistics.

Tourism in Jammu and Kashmir Region of India

Jammu and Kashmir is the northern-most state of India covering an area of 222,236 sq. Km comprising 6.93 per cent of the total Indian Territory The state shares

borders with Himachal Pradesh and Punjab, and the neighbouring countries of Pakistan, China and Afghanistan. It is the sixth-largest state of India in terms of area and 19th in terms of population; it has 22 administrative districts. It has four geographical zones of Sub-mountain and semi-mountain plain known as dry belt, The Shivalik ranges, The high mountain zone constituting Kashmir valley, Pir Panchal range & its off-shoots including Doda, Poonch & Rajouri districts, part of Kathua & Udhampur districts and The middle run of the Indus river comprising Leh & Kargil. The State of Jammu and Kashmir comprises of three very distinct special regions i.e. Kashmir, Jammu which also includes areas of Rajouri & Poonch and the region of Ladakh including areas of Kargil, Drass & Zaskar. Jammu is known as the winter capital of the State while as Srinagar is known as the summer capital. The climate of Jammu and Kashmir varies considerably with its topography and comprises of three distinct climatic regions viz. Arctic cold desert areas of Ladakh, temperate Kashmir valley and sub-tropical region of Jammu. The State is well connected with rest of the country by air, rail and road. The Indian Airlines and other private airlines operate regular flights to Srinagar, Jammu & Leh.

Economic overview

Jammu Kashmir's gross state domestic product (GSDP) was US \$17.73 billion in 2015-16. The state's GSDP grew at a CAGR of 10.2 per cent, during 2004-05 to 2015-16. The state achieved an annual growth rate of 13.03 per cent. J&K's per capita NSDP in 2015-16 was USD1, 001.2 as against USD 485.0 in 2004-05. The per capita NSDP of Jammu And Kashmir increased at a CAGR of 6.8 per cent during 2004-05 to 2015-16. The tertiary industry contributed 53.35 per cent to J&K's GSDP in 2015-16, followed by the secondary (25.07 per cent) and primary (21.58 per cent) industry. The tertiary industry witnessed fastest growth among the three industries, during 2004-05 to 2015-16; it witnessed growth at a CAGR of 12.2 per cent. The growth was driven by trade, hotels, real estate, finance, insurance, communications, transport and other services. The secondary industry expanded at a CAGR of 9.1 per cent from 2004-05 to 2015-16, driven by manufacturing, construction, electricity, gas and water supply. The primary industry increased at a CAGR of 7.6 per cent between 2004-05 and 2015-16 (Indian Brand Equity Foundation, Jammu & Kashmir, and 2014-2015)

Tourism Overview

The combination of individual tourist attractions at a particular place makes a tourist destination. Tourist destination is a particular place which attracts the tourists for a temporary or long term stay. It includes city, village, country, region or a specific purpose built resort (Baker & Crompton, 2008). According to Buhalis (2000), "*destinations are places towards which people travel and where they choose to stay for a while in order to experience certain features or characteristics a perceived attraction of some sort*".

Tourist destinations are amalgamations of tourism products, which give assimilated experience to the visitors. A tourist destination is perceived as a single entity, which comprises of several stakeholder groups like tourists, business entities operating in the tourism industry, the public industry, the host population and

representatives of non-governmental organizations (Buhalis, 2000). The main components of tourist product are destination attractions, environment, destination facilities and services, accessibility to the destination, image of the destination and price to the consumer (Middleton and Clarke, 2001).

Jammu and Kashmir is one of the most important and famous tourist destinations of the India because of its strategic location & uniqueness. Tourism is the most important industry in the service sector of the Jammu and Kashmir economy. It is one of the world's fastest growing industry. Tourism plays a crucial role in accelerating the economic development of the State. The economic activities are generated in the primary, secondary and tertiary industry of the valley. Hence tourism generated employment may be classified into three major heads. One is direct employment that sells goods and services directly e.g. hotels, restaurants, shops etc. Second one is indirect employment which generally supplies goods, services to the tourism business and thirdly investment related employment in construction and other capital goods industries. There are number of factors, such as population growth, shorter working days, larger paid holidays, increasing level of awareness among people for travelling and the need for recuperation from tensions of modern life, have created favourable conditions for the growth of tourism. Perched securely among the lofty snow-sprinkled mighty Himalayan mountain chain, the emerald blue skies peeping through the chinks of the clouds, the tall chinar trees swaying to the rhythm of the gusts of winds, all condense into a kindly smile, forming the lovely state of Jammu and Kashmir. Jammu & Kashmir is a global tourist destination and a place of attraction for tourists since centuries. It is among the most important tourist destinations of India .Tourism in the state of Jammu and Kashmir has rebounded in recent years due to number of initiatives by the state and central government.

All the three distinct regions of the state of Jammu and Kashmir i.e. Jammu, Kashmir and Ladakh have immense potential for tourism for both domestic and international tourists. Ladakh, also known as 'Little Tibet', is renowned for its pristine mountains and Buddhist culture; Jammu is famous for its temples & thus attracts pilgrimage tourists and Kashmir region is blessed by natural beauty and is known as "Paradise on Earth", attracting a larger number of domestic tourists & a fair sprinkling of foreign tourists. There are several locations across the three regions of the State which are untapped and can be developed as major tourist destinations, having the entire natural as well as the cultural resources for attracting tourists. Some of the important natural resources are the lush green forests, rocky mountains, valleys, snow skiing tracks, mountain trekking trails, meadows, garden & orchards, locations for adventure sports, wild life, trout fish, flora & fauna, springs, perennial rivers, alpine natural waterfalls, streams etc. The state abounds in large lakes such as Wular, Dal and Manasbal. The biggest brackish water lakes are TsoMoriri and PangongTso in Ladakh region. A large number of smaller lakes in the higher reaches of the mountain ranges act as surprise for adventurous tourists. Jammu and Kashmir's culture is influenced by the South Asian and Central Asian cultures. The state is known for its rich cultural heritage. As for the cultural resources, the state has some of the most

important religious shrines of Hindus, plethora of local festivals, distinct cuisine, craftsmanship skills for intricate and fine woodwork, woollens, carpets, textiles, paper mache, inlay work etc., which gives State a rich cultural identity. Further, Jammu & Kashmir have 5256 historical monuments, 4 National Parks and 9 Sanctuaries, which acts as tourist attractions as well. The state has around 1,568 registered restaurants & hotels in addition to the 84 tourist bungalows & huts, which acts as necessary infrastructure for the tourism industry in the state (Indian statistics, 2015).

Jammu and Kashmir Rank in India

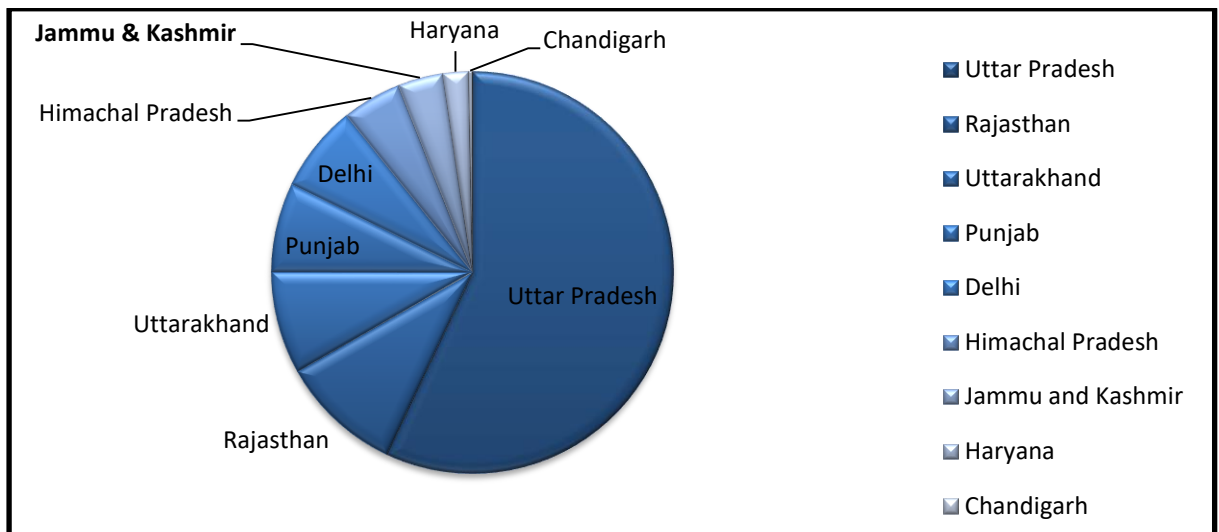
Jammu and Kashmir is the northern most state of India and is an important destination for tourist arrivals, for business and leisure. While the total number of domestic tourist visits in India amounted to 1431.9, million in 2015, those in the northern states amounted to 333.5 million in the same year. In 2013, north Indian states witnessed 353.8 million domestic tourists' visits, which declined to 333.5 million in 2015. The share of Jammu and Kashmir in northern India was low as compare to other eight northern states (3.92 per cent) in 2015 and ranked 7th in northern region (*see Table 1 & Figure 1*). The share of Jammu and Kashmir in India was less than one per cent (0.9 per cent) and ranked 17th in India in terms of number of domestic tourists visiting the state in 2015 (*see Table 2 & Figure 2*). This indicates that low share of tourism arrivals is certainly below potential if measured by the yardstick of its vast tourism resources, or its emerging economic importance.

Table 1: Percentage Share of Northern Indian States in Domestic Tourist Visits in 2015

S.No	Sates/UTs	No of Domestic Tourist Visits	Percentage (%)
1	Uttar Pradesh	204888457	61.4
2	Rajasthan	35187573	10.57
3	Uttarakhand	29496938	8.84
4	Punjab	25796361	7.73
5	Delhi	25258051	7.57
6	Himachal Pradesh	17125045	5.13
7	Jammu and Kashmir	13079530	3.92
8	Haryana	7395496	2.22
9	Chandigarh	1073842	0.32
	Total	333503932	100

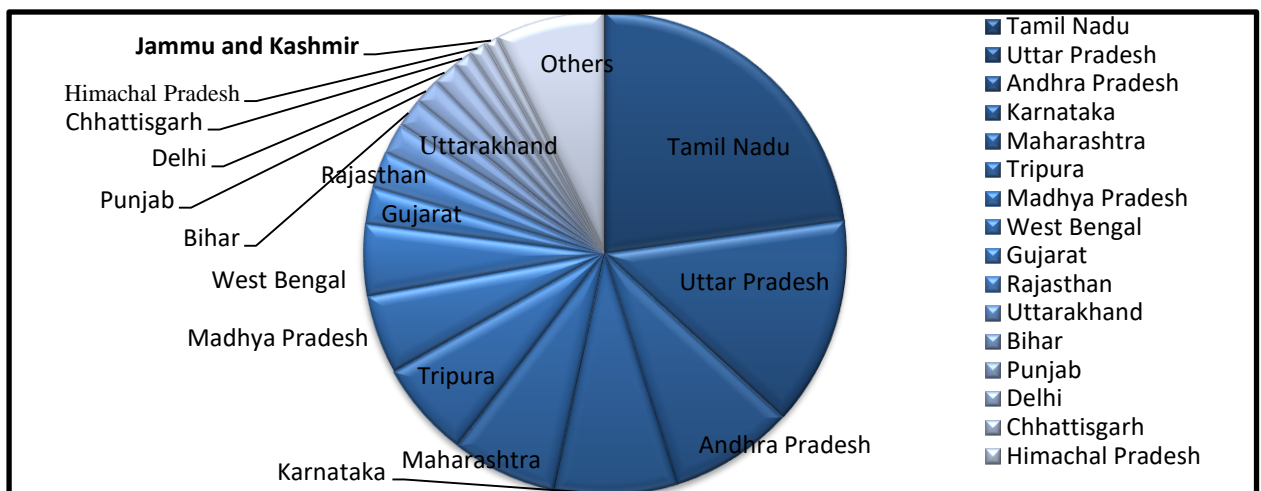
Source: Author's compilation from secondary data collected from Ministry of Tourism, Govt. of India; Department of Tourism, Jammu and Kashmir and Indian Statistics Website

Figure 1: Percentage Share of Northern Indian States in Domestic Tourist Visits in 2015



Source: Author's compilation from secondary data collected from Ministry of Tourism, Govt. of India; Department of Tourism, Jammu and Kashmir and Indian Statistics Website.

Figure 2: Percentage share of states /UTs of India in Domestic Tourist Visits in 2015



Source: Author's compilation from secondary data collected from Ministry of Tourism, Govt. of India; Department of Tourism, Jammu and Kashmir and Indian Statistics Website.

Table 2: Percentage share of states /UTs of India in Domestic Tourist Visits in 2015

Rank	State/UT	Domestic Tourist Visits in 2015	Percentage (%)
1	Tamil Nadu	333459047	23.3
2	Uttar Pradesh	204888457	14.3
3	Andhra Pradesh	121591054	8.5
4	Karnataka	119863942	8.4
5	Maharashtra	103403934	7.2
6	Tripura	94516316	6.6
7	Madhya Pradesh	77975738	5.4
8	West Bengal	70193450	4.9
9	Gujarat	36288463	2.5
10	Rajasthan	35187573	2.5
11	Uttarakhand	29496938	2.1
12	Bihar	28029118	1.96
13	Punjab	25796361	1.80
14	Delhi	25258051	1.76
15	Chhattisgarh	18327841	1.27
16	Himachal Pradesh	171 25045	1.2
17	Jammu and Kashmir	13079530	0.91
	Total of 17 States	1324983920	92.5
	Others	106989874	7.5
	Total	1431973794	100

Source: Author's compilation from secondary data collected from Ministry of Tourism, Govt. of India; Department of Tourism, Jammu and Kashmir and Indian Statistics Website.

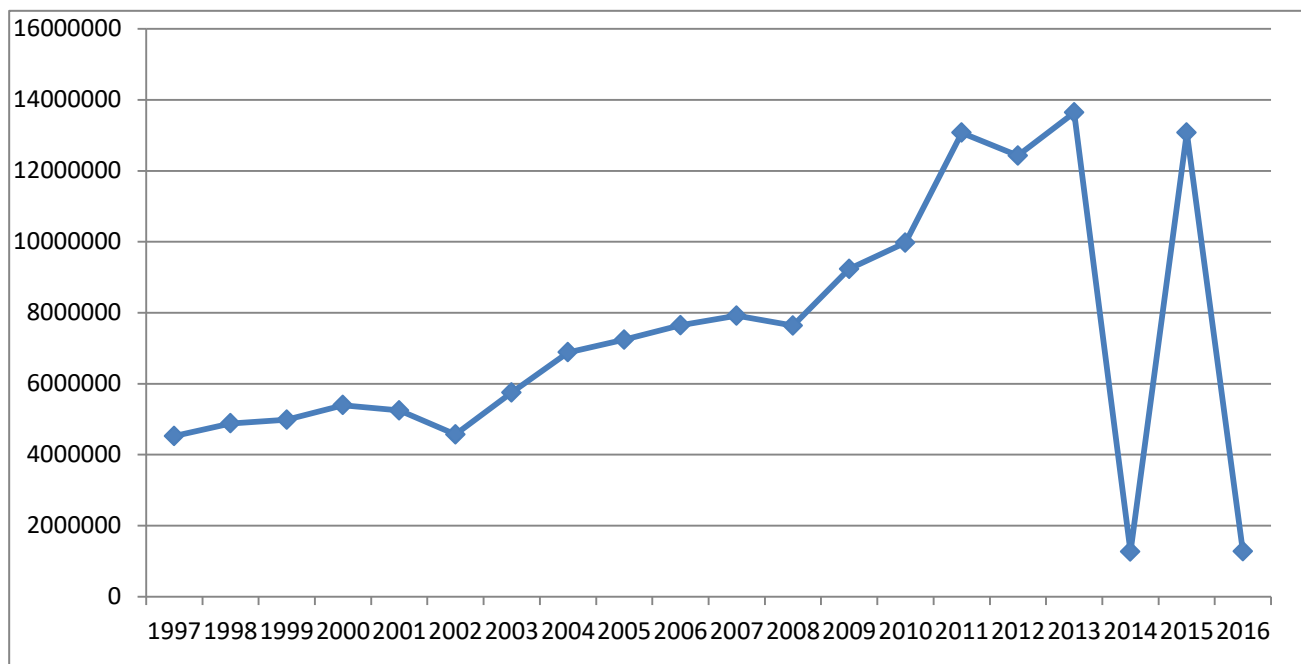
Trends in Tourist Arrivals in Jammu & Kashmir

The three regions of Jammu and Kashmir have a natural comparative advantage for the development of the tourism and are established tourist destinations. Despite, the fact that the development of tourism in Jammu and Kashmir is linked to its glorious tradition and rich culture heritage, the state has failed to create its niche in international and domestic tourism. The statistical data presented in the Table 3 are projected over a twenty -year horizon starting in 1997 to 2016. The data make it possible to deduce that tourism has increased steadily and has been resilient in the face of the macro environment factors which have negatively affected the tourism industry in the state.

Domestic Tourist Visits: In all the tourism based states of India, domestic tourism occupies a predominant place in the total tourist's inflows and this holds good for Jammu and Kashmir also. Domestic tourists contribute the significant proportion of the total number of tourists in the state.. *Table 3 and Figure 3* indicate that the number of domestic tourists in the state has increased significantly over the past two decades from 4523646 in 1997 to 13079530 in 2015. In fact, the domestic tourist visits crossed

the ten million mark in 2011 and showed a significant growth for two consecutive years but the devastating flood that hit Kashmir in September 2014 adversely affected the tourism industry in Jammu & Kashmir with number of domestic tourists reduced to 1262442. Tourism industry in Jammu and Kashmir recovered quickly after the floods and witnessed 13079530 in the year 2015 but again decreased in 2016 due to unrest and witnessed only 12,74,596 tourists.

Figure 3: No. of Domestic Tourist Visits (DTV'S) to Jammu & Kashmir (1997-2016)

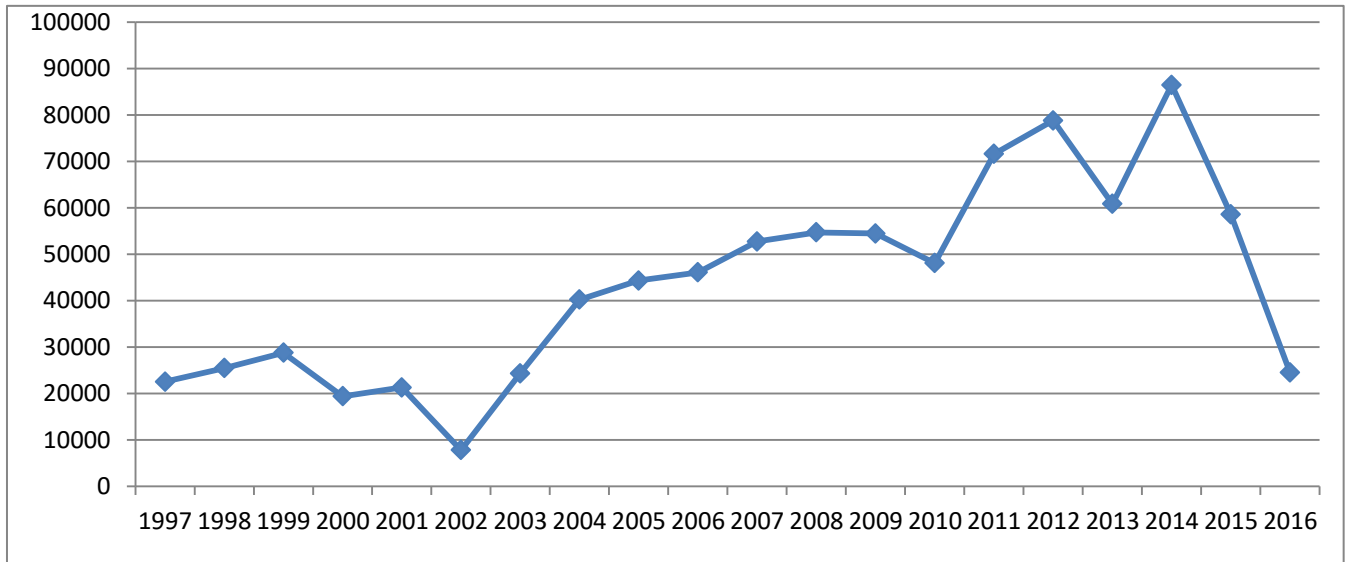


Source: Author's Compilation based on secondary data from Ministry of Tourism, Govt. of India; Department of Tourism, Jammu and Kashmir and Indian Statistics Website and IBEF Report J& K- 2016

Foreign tourist visits: A large number of tourists are visiting Jammu and Kashmir from the various countries across the globe. Table 3 and Figure 4 shows that the number of foreign tourists in Jammu and Kashmir has shown lower growth rate over the past two decades from 22554 in 1997 to 58568 in 2015 and dipped down to 24516 tourists in 2016. However, foreign tourist visits in the state was affected in the year 2002 because of economic recession, and only 7821 foreign tourist visited Jammu and Kashmir. Further, an analysis of the foreign tourist arrival data in 2007 for Jammu and Kashmir shows that visitors from USA comprise the largest proportion of foreign tourists with 2.07 percent share of the total foreign visitors. Tourists from UK, South Africa and Malaysia comprise the next biggest share with 1.80, 1.19, and 1.56 per cent respectively. The data highlights that apart from English speaking countries like UK, USA, Australia and Canada, a fair share of foreign tourists arrive from non-English speaking countries like France, Germany, Italy and Japan. If the state maintains its economic growth momentum and conflict in the state is managed, the

strategic growth of tourism industry in the state of Jammu and Kashmir is inevitable. According to Indian brand equity report (IBEF) 2017, Jammu and Kashmir anticipates 22.7million tourist arrivals in 2020, which can propel the economy of state to a greater extent and thus can compensate for the losses due to political instability.

Figure 4: No. of foreign Tourist Visits (FTV's) to Jammu & Kashmir (1997-2016)



Source: Author's Compilation based on secondary data from Ministry of Tourism, Govt. of India; Department of Tourism, Jammu and Kashmir and Indian Statistics Website and IBEF Report, J& K- 2017.

Table 3: No. of Domestic and Foreign Tourist Visits to Jammu & Kashmir (1997-2016)

Year	No of Domestic Tourist Visits (DTV's) to Jammu And Kashmir	No Of Foreign Tourist Visits (FTV's) to Jammu And Kashmir	Total Tourists Visits to Jammu And Kashmir
1997	4523646	22554	4546200
1998	4878445	25485	4903930
1999	4984773	28798	5013571
2000	5393463	19400	5412863
2001	5246948	21298	5268246
2002	4570583	7821	4578404
2003	5748846	24330	5773176
2004	6881473	40242	6921715
2005	7239481	44345	7283826
2006	7646274	46087	7699028
2007	7915271	52754	7968025
2008	7638977	54697	7693674
2009	9234862	54475	9282961

2010	9973189	48099	10021288
2011	13071531	71593	13143124
2012	12427122	78802	12505924
2013	13642402	60845	13703249
2014	1262442	86477	1348919
2015	13079530	58568	13138098
2016	12,74,596	24516	12,99,112

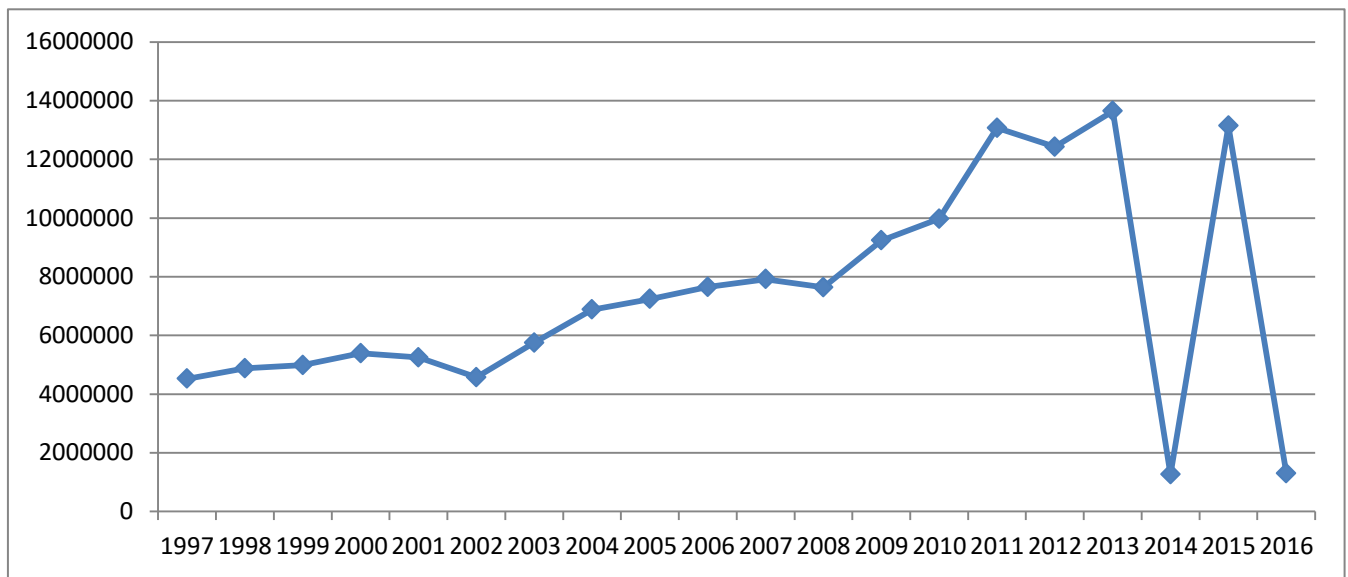
Source: Author's Compilation based on secondary data from Ministry of Tourism, Govt. of India; Department of Tourism, Jammu and Kashmir and Indian Statistics Website and IBEF Report, J& K-

Impediments to Tourism industry in Kashmir

The statistics in *Table 3 and Figure 5* confirm Jammu and Kashmir's incompetence as a destination within the India, which attracted only 1.2 million tourists in 2016 and suggest an incapability to avoid or surmount the impediments to the tourism development. Several impediments retard development of a broad and locally based Jammu and Kashmir's tourism industry. The following can be identified as impediments to India's tourism development. As per the Tenth Planning Commission Report on Tourism, the major impediment to the growth of tourism has been the lack of awareness about the benefits it can bestow upon the host population. "The goal of sustainable tourism requires well coordinated human resource development (HRD) strategies aimed at tourism industry personnel and the host community in general" (Srivastava, 2008). The key point here is that work cultures, operational activities and a professional and ethical approach to sustainability are central to the concept of "Sustainable Tourism." The hospitality professionals involved in the roundtable discussion strongly endorse this point. The Planning Commission Report has summarized the main factors that affect India's tourism competitiveness:

These include tourism crisis, lack of adequate Infrastructural support, lack of training at the "cutting edge", insufficient involvement by the private industry in tourism development, a strategic mismatch between the room supply and demand, over charging of services, lack of hygiene and sanitation, lack of website, lack of comprehensive social media coverage and ignorance of the region by the public and the tourism industry.

Figure 5: Total Tourist Visits to Jammu & Kashmir (1997-2016)



Source: Author's Compilation based on secondary data from Ministry of Tourism, Govt. of India; Department of Tourism, Jammu and Kashmir and Indian Statistics Website and IBEF Report, J& K- 2017

- i. **Tourism Crisis:** Possibly the single biggest impediment to tourism industry growth in Jammu & Kashmir is the tourism crisis. A number of authors have attempted to define a crisis to help improve their understanding of this phenomenon. Pauchant and Mitroff (1992) believe that a crisis is a “disruption that physically affects a system as a whole and threatens its basic assumptions, its subjective sense of self, and its existential core.” According to Hai, (2011) tourism crisis means undesired events that influence the confidence of the tourists about a destination and affects the abilities of organization or countries to operate normally .Further Sonmez et .al (1999)stated that a tourism crisis is an event which can be threat for the normal operations and conduct of tourism related businesses, spoil a tourist destination’s image for safety ,attractiveness ,and comfort by negatively influencing tourists perceptions of that destination and disrupt the business operations of the local tourism industry by reducing tourist arrivals. Furthermore it damages the destination image for safety and attractiveness. Glaesser (2005) saw a crisis as an undesired, extraordinary, often unexpected and timely limited process with ambivalent development possibilities. Long lasting series of crises poses almost a significant threat to the destinations public image and its ability to attract tourists (Beirman, 2003) especially if it is dramatised or distorted through rumours (Ritchie et al., 2002). For destination marketing organisations, crisis represents the most severe challenge to the marketability of a destination. Crisis management is as much about dealing with human perceptions about the crisis as it is about physically resolving the crisis situation. (Heath, 1998). Jammu and Kashmir is facing such crisis from last so many decades because of the Political instability, wars, civil unrest, strikes and conflict. The tourism in Jammu and Kashmir after 1947 was

first hard hit in 1962 Chinese attack and 1965 Indo- Pak war .The tourism industry again got blow in 1971 Indo-Pak war. But the 1989 insurgency was one of the major setbacks to tourism industry in Jammu and Kashmir and there was an abysmal decrease in the tourist flow from 1990-1996. Further the effect of Kargil War in 1999 was prevalent in early 2000's to tourism industry in Jammu and Kashmir when tourism industry again witnessed negative growth. 2008 and 2010 unrest in Jammu and Kashmir also affected the tourism industry to some extent. Most recent is the 2016 unrest when 90 per cent tourists left the Kashmir Valley of the state onset of the turmoil. According to the State Economic Survey (2016). Tourism industry suffered a loss of around 13,291 crore due to the unrest and only 1.2 million tourists visited Jammu & Kashmir in 2016 (See Figure 5).

The impact of natural disasters had also been more profound during the last few years in India and this can be attributed to the changing climate patterns around the world as well as the increased number of tourist spots. In fact, natural disasters impacts tourism industry adversely, it causes tourist destinations to lose their beauty, culture and economy for a temporary or extended period of time. The scale of the damage depends to a large extent on the fury of the natural disaster. Kashmir y has experienced such natural disasters in the past decades 1957 and 1959 floods, 2005 earthquake and recent 2014 floods (5th most deadly disaster worldwide in 2014).Although the impact of earthquake was not so significant, tourism industry in Kashmir has been hard hit by 1957 and 2014 floods (See Figure 5 .)

Thus the Tourism sector has been one of the most vulnerable sectors to crises in Kashmir in past decades. The crisis in the valley has resulted to the negative image of Kashmir in the minds of tourists.

- ii. **Lack of adequate Infrastructural support:** Tourism industry is considered to be a potential industry for growth and contribution to the Jammu and Kashmir GDP, however there is a need of bridging the gaps in tourism infrastructural facilities. Success in a service industry and tourism in particular, depends to a large extent on better access to infrastructure, with a consumer-centric approach. But infrastructure in Jammu and Kashmir is a deterrent there is a need to upgrade travel by all modes air, rail and roads and other infrastructure like food joints, civic amenities, help lines, medical centres etc., so as to meet global standards. The road network is vital to the tourism industry in Jammu and Kashmir as all the tourist destinations in the state are entirely dependent on roads. While tourism infrastructure has come a long way in Jammu and Kashmir, there is an ample room for further expansion throughout the state.
- iii. **Lack of training at the “cutting edge”:** There is a need for a better and more consistent training so as to enhance requisite skill levels in hospitality and tourism industry; the various education and training institutions have not been able to produce enough professionals to meet the industry's expectations.

Currently, there is only one Institutes of Hotel Management and Catering Technology in Kashmir and one food craft institute in Jammu.

- iv. **Insufficient involvement by the private industry in tourism development:** Tourism, today is not the prerogative of a few, i.e. it is no more a class activity but has become a mass phenomenon because of better affluence, more available leisure time and increased feeling to seek pleasure. On the other hand the immediate challenges facing the tourism industry are so formidable that government agencies/public industry alone may not be able to content with them effectively and there upon the role of private in tourism promotion apparently increase significantly. The major reasons for lack of private investment is absence of legislative support, lack of policy integration and coordination, lack of long-term investor friendly policies, heavy taxation and restrictive land policies.
- v. **Lack of Hygiene and Sanitation:** can act as a major impediment to the development of tourism and the tourist's experience of the state As per the Swachh Bharat survey 2017), none of the cities of Jammu and Kashmir has come closer to be called 'cleanest city', The survey has ranked Srinagar at 241 positions in the list of cleanliest cities india, while as winter capital Jammu stood at 251st position (Swachh Bharat survey report, 2017).
- vi. **Over charging of services:** Most of the services are overcharged at the tourist destinations like accommodations, transport etc. The pricing of hotel accommodation is not competitive and Jammu and Kashmir hotel accommodation is overpriced for its quality compared with the rival's. The room rates for even three star rated accommodations in Jammu and Kashmir increases in peak tourist seasons. Further, Kashmir airfare soars in the winter season and affects winter tourism in Kashmir.
- vii. **Poor Marketing Strategy:** The general notion at industry level is that marketing of the nation's endowment with competitive tourism attractions is not adequate to ensure the growth of the industry. It is acknowledged that Jammu and Kashmir has made some efforts in marketing the state, given the adverse macro political and economic environment of the state after crisis. But these efforts need to be more innovative and expanded in order to ensure that the state derives maximum benefits from its natural and manmade endowments. It was noted that the lack of knowledge is reflected in the poor quality of some of the organization's promotional material as well as the limited range of collaterals it produces to promote the state. There is a need for Jammu and Kashmir to try and match world class standards when it comes to the quality and creativity of its marketing.
- viii. **Lack of website:** Information technology plays an important role in the promotion of tourism. Internet could be one of the most effective promotional tools when advertising the destination sites of Jammu and Kashmir. The rapid growth of internet has a great impact on travel services too and has increased speculation about the possibility of the disintermediation of travel agents

(Bennett and Lai, 2005). Tourism organisations and operators in Jammu and Kashmir need to develop their active websites, although such a site already exists, the lack of regular updates and out-of-date content make it very ineffective as a marketing tool. Actors of the tourism industry (governmental bodies, travel agencies, tourism operators, etc.) should maintain the homepage in an attractive manner in order to attract visitors, first to the website and then to the actual destination.

- ix. Lack of Comprehensive Social Media Coverage:** Social media marketing refers to the process of gaining website traffic or attention through social media sites. In today's world a social media has become most important part of communication medium for any organisation and when it comes to tourism industry, the importance of website increases exponentially due to the involvement of the foreign citizens. The Jammu and Kashmir Tourism Development Corporation has a traditional way of going about promoting their state Jammu and Kashmir and lacks robust comprehensive social media coverage that could give all the necessary information and create a professional brand image for Jammu & Kashmir tourism.

The Existing Paradox

Since tourism is a multi-dimensional activity, and basically a service industry, involving different stake holders, it is very much needed to synergize and synchronize the efforts & activities of various agencies of the Central & State government, private sector and voluntary organizations, so as to collaborate the activities towards sustainable growth of tourism in Jammu and Kashmir .Jammu and Kashmir's tourism industry needs to be understood in conjunction with transportation, hospitality, and aviation and infrastructure businesses. Only a well-balanced operation and coordination among these sectors will result in a more competitive industry. Furthermore The state of Jammu and Kashmir is a conflict driven state, with a geo-political disadvantage, which makes the tourism environment very hostile and creating a sense of fear among the visiting tourists and potential tourists as well. The state and central government needs to ensure the creation of safe and secure atmosphere for the visiting and interested tourists The Jammu and Kashmir Indian Tourism Industry can be called the "industry of big paradoxes," on the one hand, it has numerous advantages to its credit, on the other hand the tourism industry is still well-behind other states in India It is also clear that the industry needs better cooperation between the public and private sectors.

Suggestions for improvement

The implementation of a number of key action points will greatly benefit the tourism development in Jammu and Kashmir .Based upon the analysis of secondary data there is an ample scope for improving the performance of tourism in the state of Jammu & Kashmir .With the changing dynamics of the tourism industry across the globe and changing customer tastes & preferences, there is a requirement for the tactical

interventions in this industry. Being a political disturbed state and hill based economy, the state government of Jammu and Kashmir along with the support of government of India, needs to work proactively for the strategic growth and development of this industry in the state. On the basis of impediments identified various suggestions can be derived for this industry and policy makers (government agencies) of Jammu & Kashmir state.

- Based on Mansfield's (1999) recommendation Jammu and Kashmir should cope with crisis as a long-term process by monitoring of past and current trends as a travel destination; cooperation and integration of all operations; representation of all parties involved; access to comprehensive information exchange at the level of security and safety; and proper budgeting. Further Crisis requires radical management action in response to events beyond the internal control of the destination, necessitating urgent adaptation of marketing and operational practices to restore the confidence of employees, associated enterprises and consumers viability of the destination. It demands immediate decisions and counter measures in order to influence the further development again positively for the destination and to limit the negative consequences as much as possible (Manhas, 2012). This suggests that crisis communication is an essential part of managing crises and should be an important consideration for the tourism industry in Jammu and Kashmir therefore, it is necessary that Destination management organisations (DMO's) ensure to create a positive image through proper destination positioning and provide new opportunities to the state in becoming an attractive tourist destination all over the world. Moreover, advance research and understanding is required in the field of tourism crisis to help improve the understanding of such incidents.
- Destination management organizations (DMO's) in Jammu and Kashmir should pay much attention to important satisfaction attributes such as infrastructure and make investment in development of infrastructure, service quality and safety.
 - The state of the Jammu and Kashmir is a hill state and is connected to the rest of the world through three means road, rail and airway. However, till date the railway connectivity is limited to Jammu region and
- The government of Jammu and Kashmir needs to invite and attract the national & international level tourism based organization to Jammu and Kashmir for building tourism business opportunities on public-private partnership (PPP) basis.
- The government of Jammu and Kashmir needs to improve sanitation and hygiene in places of tourist attractions, also owners and managers of hotels, lodges etc need to take care of hygiene for attracting more tourists and thereby boosting the tourism industry's revenue base.
- The state government in collaboration with Destination management organizations (DMO's) & NGO's needs to develop marketing plans for the interested tourists
 - The state government needs to develop for tourists the life insurance cover for any conflict related incident/accident. This will improve the sense of

safety and security among the interested tourists both domestic & international.

- The state government along with state's tourism ministry and Destination management organizations (DMO's) to strategize the promotion policy for the tourism industry of the state as a whole as well as for the various specific tourist destinations of the state such as Gulmarg, Pahalgam etc. This will help in changing the destination image among the interested tourists from "no go area/disturbed state" to "Paradise on Earth."
- The state government also needs to draft plans for reducing negative publicity that the state has earned due to the political disturbances and conflict crisis. The state government needs to engage famous personalities as brand ambassador for the tourism industry of the state valley, just like Mr. Amitabh Bachan is the tourism brand ambassador for the state of Gujarat. The study revealed that Kashmir is having difficulty in reaching tourists with the right promotional instruments. The strategy seems to be extremely dependent on printed materials which are proving to have less impact and reach regarding promotion of the tourism in the 21st century. There is a scope for initiating promotion of the tourism industry of Jammu and Kashmir through various digital platforms and use of information and communications technology (ICT).
- Build competitive digital capability is essential in both marketing Jammu and Kashmir and in the distribution of tourism products. Internet users in India are expected to grow to 730 million by 2020 (NASSCOM) and 66 per cent of the world is expected to be online by 2020. Therefore, developing strong and efficient digital marketing and transactional capabilities is essential to remain competitive. Currently, only the marginal Kashmir based tourism operators have online booking and payment facilities, limiting their ability to service customers both domestically and overseas. Governments should continue to work with industry to ensure more tourism enterprises are able to take advantage of online opportunities. With the advancements in information technology, lowering of the information technology cost and increasing usage of information technology by the people, tourism industry of the state needs to embrace the information technology, especially immediate tourism stakeholders such as tour & travel organizations, tourism department, tourism ministry, various tourism development authorities, hoteliers etc. need to keep their websites updated with the relevant information, easy to navigate and very responsive.
- State government needs to sensitize and aware tourism industry related people, through seminars & workshops, about the changing dynamics of the service industry around the globe, especially tourism industry.

- All the new developmental projects, having an impact on tourism and environment should be carried out in a sustainable way without damaging the fragile ecology of the state.
- For strategic growth and development of the tourism industry in the state of J&K, it is very much required to educate Kashmir citizens about the importance of tourism industry, changing dynamics of tourism industry across the globe, the changing facets of the tourist as a customer as well as the skills required while handling a tourist visiting different tourist destinations across the three regions of Jammu and Kashmir state.

Concluding remarks

Tourism industry of Jammu and Kashmir offers various advantageous scopes for the revenue generation, employment avenues and social development. Tourism industry of Jammu &K Kashmir has potential of becoming major contributor of state's gross domestic product. It also offers backward and forward linkages with the other sectors of the State. The stakeholders of tourism industry of Jammu &Kashmir needs to focus on improving its performance and concentrate on the strategic growth and development of this industry.

The study of Jammu and Kashmir yields insights into how a most beautiful state with a perfect supply of conventional natural and cultural attractions is not becoming a more competitive and sustainable tourist destination due to some of the impediments

. The paper underline the need for a more focused synergistic approach in addressing the impediments in order take advantage of existing potential and emerging opportunities in the international, regional and tourism markets. A greater level of involvement of key stakeholders in understanding the impediments as well as formulating and implementing effective and efficient tourism development strategies is proposed. However the present analysis is by no means exhaustive but opens up the area for reflection (for policy makers) and enquiry.

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