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Ministry of Tourism, Government of India



International Travellers' Prioritisation of Ladakh/ Valley of Kashmir

2017

**INDIAN INSTITUTE OF TOURISM AND
TRAVEL MANAGEMENT**

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International Travellers'
Prioritisation of Ladakh/ Valley of
Kashmir

A report by



Indian Institute of Tourism and Travel Management

Preface

A two-phase study of *International travellers' prioritisation of Ladakh/ valley of Kashmir* was commissioned by Ministry of Tourism, Government of India and carried out by the Indian Institute of Tourism and Travel Management (IITTM). The northernmost state of the country- Jammu and Kashmir, is an important part of the country. The state once had a thriving tourism, owing to its abundant natural pristine beauty. The political turmoil in the state which began in December 1989, damaged tourism in the state to a large extent. While other parts of the country, during these years, ensured that necessary support is available to tourism, the state's image as a leading tourism destination was tarnished owing to the insurgency.

Over the years, efforts have been put in to restore normalcy in the state. There is no denying that tourism is integral to the development of the state of Jammu and Kashmir.

A large number of places in this Himalayan state are rather remote. In places like Gulmarg, Sonmarg, Pahalgam, Aharbal, Bhaderwa, Kargil, Leh, Nubra, Parkchak, Mulbek, etc., tourism is the most significant economic activity. Tourism creates jobs for the locals who work in hotels, houseboats, guest houses, restaurants, dormitories, dak-bungalows, holiday inns and campsites, etc. Taxes from tourism activity are huge revenue generators for the state government. Taxes on hotel bills, clubs, wine shops, and entry tickets to parks and museums, etc., raise additional income to the state.

In addition to employment in the tertiary sector, tourism encourages the development of handicrafts and other cottage industries who are suppliers to the tourism sector. The state of Jammu and Kashmir, especially the Valley of Kashmir has always enjoyed a worldwide fame for the exquisite quality and novelty of its arts and crafts. Buddhist traditions of Ladakh is acclaimed globally.

Tourism in the state has begun to pick up, but its share of the domestic and inbound tourism is far from satisfactory. Initially, the state was focusing on domestic travellers. However, some segments and new segments of international tourists have been visiting the Valley of Kashmir and Ladakh recently. Both the Government of India and, Government of the state of Jammu and Kashmir are interested in understanding the profile of these visitors and product bundling to strategize.

This report presents the results of the study carried out in two phases. The phase I focuses on studying the prioritization and bundling by international travelers. Phase II focuses on tourist feedback on tourism services quarter by quarter.

The study benefitted from the inputs of the former Director, Prof Manjula Chaudhary, who conceived the study and led it during the Phase I. Ms Indrani Pradhan (Project Fellow) and field teams at Srinagar and Leh supported this research. During Phase I, the team at Srinagar was led by Dr Riyaz Qureshi, Assistant Professor with Kashmir University. His team of researchers included- Mukhtar Bin Farooq Ibn Ali, Nadeem Akhtar, Ghulam Sarwar Rasool and Zulfiqar Ali Rather. At Ladakh, the field team included- Puntsog Dolma, Khatija Bano, Stanzin Angmo and Sonam Youron. Mr Nawang Tsering supervised this team. During the second phase of the study, the data was collected throughout the year, and so dedicated surveyors were appointed. Mr Jahangir Malik assisted with the survey in Valley of Kashmir, while Mr Sonam Dorje assisted with the study in Ladakh.

Research Team would also like to thank the Secretary (T) Shri Vinod Jutshi and the previous secretaries of the Ministry of Tourism, Shri. Parvez Diwan and Dr Lalit Pawar who reposed faith in IITTM for this study. The team would also like to thank other officers of the Ministry- Mrs Usha Sharma (Ex- ADG), Mr Suman Billa and Mrs Preeti Srivastava (Jt. Secretaries in the Ministry) and Mrs Meenakshi Sharma (ADG) for their support and timely inputs. Support of Department of Tourism, Government of Jammu and Kashmir, airport authorities at Srinagar and Leh is also appreciated.

Distinguished experts from outside of IITTM provided valuable insight and advised. In particular, we would like to thank Dr R.K. Bhatnagar, *Additional Director General* and his team at *Market Research Division* comprising of Smt. Mini Prasanna Kumar, *Joint Director*, Ms. Neha Srivastava, *Assistant Director* and Sh. Shailesh Kumar, *Deputy Director*. Their critique and questioning came handy to fine tune the report.

We benefitted from numerous discussions with academic experts, practitioners in the field and different stakeholders. We would like to acknowledge the support provided by the non-teaching staff of the Institute who were more than willing to facilitate in all possible manner. Special thanks are due to thousands of respondents from Valley of Kashmir and Ladakh who pleasantly surprised the research team with some very useful ideas during the interactions.

Our aspiration at IITTM is to contribute to the existing body of knowledge, first by the creation of knowledge followed by its dissemination. IITTM's stakeholders include business leaders and policy makers besides the students and trainees. Institute strives to serve as a rendezvous for dialogue on the tourism trends and their implications among academics, businesses and policy makers.

As with all IITTM studies, this is an independent research. All care has been taken to ensure research neutrality. We also invite any discussion or comment on tourism in the state of Jammu and Kashmir based on this report.

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Key findings

As we submit this report, the state of Jammu and Kashmir is trying to resurrect itself from the political unrest that struck the state in early part of July 2016. Life in the state came to a standstill, and so did tourism, which had begun to contribute to economic development of the state. This study on International Travellers' Prioritisation of Ladakh / Valley of Kashmir has become all the more important as efforts would be made to put tourism in the state back on track. The study endeavours to uncover how the international visitors prioritise their visits to Ladakh and Valley of Kashmir. What other destinations do they buy along with their visits to these places?

Key findings of this study carried out in two phases are as following:

- The average stay of tourist (stay in India less than 30 days) in India is 11.9 days. International Passenger Survey of 2012 puts the average stay (all India) at 10.65 days.
- Tourists to Valley of Kashmir (stay in India less than 30 days) stay there on average for 5.5 days and are likely to stay in Ladakh for 2.9 days
- A visitor to Ladakh (stay in India less than 30 days) stays there on average for 9.6 days with less than a days' stay in Kashmir.
- The Valley of Kashmir is attracting tourists from non-conventional markets- Malaysia and Thailand. The UNWTO (2013) report suggests that 4/5 of tourist travel within the region. The Valley of Kashmir and Ladakh can, therefore, seek visitors from neighbouring countries (short haul).
- Tourist to Ladakh is more focused and is less likely to buy another destination along with the visit to Ladakh. They spend around 74.4% of their holiday time in Ladakh.
- Tourists to the valley of Kashmir spend only 50% of their holiday time in India in Kashmir.
- 63.8 % international travellers to the Valley of Kashmir and Ladakh are independent travellers (they do not buy a package).
- The average stay of tourist (barring those staying in India for a very long time) is more in Ladakh than in Valley of Kashmir; this can partly be explained by the need to spend some time (extra) in acclimatisation.
- Visitors do not buy visit to Ladakh, Kashmir and Jammu together. They typically visit/ spend a significant part of their tour at one of these destinations.

- Two factors play a major role in determining purchase of another destination along with Valley of Kashmir and Ladakh- the stay in India and the distance of the destination from the primary destination of the visit.
- As a contrast to this, visitors to Kashmir are more likely to purchase visit to other destinations. 66.7 % of the longer staying tourists are likely to visit Agra. Even 60% of shorter staying tourists are likely to visit Agra.
- For visitors to Ladakh, purchase of other destinations appears to be affected by distance and access. Thus, Agra is the most popular destination to be in the shopping basket followed by Rajasthan, Goa and Kerala in that order.
- Delhi appears to be the most popular 'other' destination for visitors to both Ladakh and Valley of Kashmir followed by Himachal Pradesh.
- Only in the case of visitors staying longer in Ladakh, they tend to buy Nepal. This is not the case with the travellers staying long in Valley of Kashmir.
- Visitors do not buy other neighbouring destinations along with Kashmir or Ladakh. However, Thailand appears to be the most important destination for the visitors to both Valley of Kashmir and Ladakh.
- The average size of the group in Valley of Kashmir is 3.8, and in Ladakh, it is 4.9.
- International travellers to Ladakh and Valley of Kashmir are most satisfied with attractions followed by boarding and lodging, while they are least satisfied with amenities.
- Different tourist segments seek various products at the two destinations.

Research

The study comprised of the survey in two phases- Phase I in February to June 2014. The sample size was 3015 with 1437 sample points in Valley of Kashmir and 1578 sample points in Ladakh. The data was collected only at the airports from international tourists arriving at these destinations. The research team carried out Phase II of this study between April 2015 to April 2016. The team collected an additional sample of 1332. The sample points were spread over the four quarters of the year. Researchers administered a modified questionnaire which elicited responses on items additional to those in phase I. This time, the data was collected from all over the destination.

1. Introduction

The, Ministry of Tourism, Government of India, entrusted Indian Institute of Tourism and Travel Management with the job of studying International Travellers' Prioritisation of Ladakh / Valley of Kashmir. The study was carried out in two phases. The purpose of the survey was to establish if the tourists are visiting the destinations separately or if they buy them together. Further, the study proposed to decipher if the visitors were purchasing other destinations along with these two destinations. The first phase of the survey was carried out over a 5-month duration- February to July 2014. During the second phase, the data was collected between April 2015 and May 2016. The primary purpose of research in this phase was to understand the purchase profile of the visitors and to map their perception of services they received at the two destinations.

The study team comprised of the following:

Director of Study	Prof (Dr) Sandeep Kulshrestha, <i>Director</i> , IITTM
Principal Investigator	Prof (Dr) Nimit Chowdhary, <i>Professor</i> , IITTM Nellore
Investigators	Dr Shailja Sharma, <i>Asst. Professor</i> , IITTM Noida Mr Ravinder Dogra, <i>Asst. Professor</i> , IITTM Gwalior

1.1 Terms of Reference

Vide its communication D.O. No. 8(50)/ 2012-MRD dated December 13, 2012, Ministry of Tourism, Government of India set the following Terms of Reference (ToR) for the study:

- a. To estimate the proposed duration of stay (in number of days) of foreign tourists in India/ South Asia.
- b. To estimate the number of days proposed by foreign tourists to stay in Ladakh/ Valley of Kashmir during the stay of a foreign tourist in India.

- c. To analyse the list of other places (apart from Ladakh and Valley of Kashmir) visited / proposed to be visited by the foreign tourists in India/ South Asia during the same trip.
- d. To finally ascertain the fact whether/ Ladakh/ Valley of Kashmir is priority attraction of foreign tourists in India or not.

1.2 Background of study

The state of Jammu and Kashmir is the northernmost state of the Union of India. It has had a long tradition of visitors from the rest of India and the world. The tourism in the state had witnessed a breakdown during the two decades beginning December 1989. This period was the time of heightened insurgency. During that time, Kashmir had metamorphosed - regarding its politics, discourse, the nature of the militancy, the level of external intervention and perceptions of the potential solutions (Happymon, 2009). Besides the political unrest, the state had also witnessed natural disasters in recent times. There were incessant rains on September 4, 2014. For continuous 30 hours and in three days the rainfall touched 450 mm which was very unusual. Rains take place in the state of Jammu and Kashmir from July to mid-September. On September 3 there was a rainfall deficit of 32 percent but on September 8 it showed an excess of 18 percent i.e. a change of 50 percent in five days. These claimed at least 280 lives and stranded hundreds of thousands of residents. Besides these several disasters of smaller magnitude have been reported in the state. Together, this has created a negative impression of the state as a tourist destination.

However, the tourism in the state has been improving over the last several years. Tourism which had come to a standstill during the peak insurgency has gradually improved. Both domestic and international tourist have been visiting the state. The numbers are, however, far from satisfactory.

The state of Jammu and Kashmir comprises of three distinct regions- Kashmir, Ladakh and Jammu. The state gets pilgrims for Jammu, families and groups for Kashmir and youth for Ladakh. Besides the *Vaishno Devi* shrine, the Jammu region is known for is noted for its scenic landscape, ancient temples and mosques, Hindu and Muslim

shrines, castles, gardens and forts. Jammu's historic monuments feature a unique blend of Islamic and Hindu architecture styles.

Kashmir has long been known as paradise on earth. Kashmir's mountainous landscape has attracted tourists for centuries. It was the summer retreat of the Mughal emperors of India. Kashmir valley is dotted with scenic places like Dal Lake, *Pahalgam*, *Gulmarg*, *Yeusmarg* and *Mughal Gardens*, etc. These have been sought after destinations for the Indian film industry through the 1960s till the onset of the insurgency. Kashmir's natural landscape has made it one of the popular destinations for adventure tourism in South Asia. The shrine of *Amarnath* in Kashmir valley attracts about 4 lakh devotees every year.

In recent years, Ladakh has emerged as a major hub for adventure tourism. This part of Greater Himalaya called "moon on earth" consists of naked peaks and deep gorges. Leh, the capital, is also a growing tourist spot. Ladakh is also popular for its Buddhist traditions and has attracted visitors from many East and South-east Asian countries. Festivals of Ladakh are globally acclaimed.

In recent years, the state has lined up many exciting activities for the tourists in the form of fairs, festivals, sports and adventure and expected impressive growth in arrivals.

In Jammu and Kashmir, Domestic Tourist Visits (DTV) fell about 3 percent to 91.45 lakh last year from 94.38 lakh in 2014, while DTVs to different states and Union Territories recorded a growth of 11.6 percent in 2015. Foreign Tourist Visits (FTVs) to the state of J&K decreased by about 32 percent to 58,568 in 2015 from 86,477 in 2014 while overall FTVs in India increased by 4.4 per cent to 23.33 million in 2015 from 22.33 million in 2014. Thus, the state is receiving only around 0.25% of the foreign tourists visiting India. The top ten states accounted for 88.4% of foreign tourist visits in 2015. These include Tamil Nadu, Maharashtra, Uttar Pradesh, Delhi, Rajasthan, West Bengal, Kerala, Bihar, Karnataka and Haryana. The rest of the states which include Jammu and Kashmir constitute remaining 11.6 percent of the total foreign visits.

Given the unrest in the state, traditional top source international markets for the state have issued negative advisories for travel to the state, particularly the valley of Kashmir. These include mainly European countries, USA, Canada, Australia, and New Zealand. As

many as ten foreign countries have issued negative travel advisory earlier for Kashmir which continues to be in place. Germany was the first to issue an adverse travel advisory following the eruption of armed insurgency in Valley. While Germany lifted it, other nations including the United Kingdom followed the trend and issued a travel advisory to its citizens against visiting Valley of Kashmir.

The UK through its advisory had asked its citizens to avoid travelling to Jammu and Kashmir excluding three cities: Jammu, Srinagar and Ladakh. Famed adventure destinations like Pahalgam, Gulmarg and Sonamarg, fall within the barred areas. Similarly, countries including New Zealand and Australia had strictly advised its citizens, to avoid travelling to Kashmir (Akmali, 2016).

The state has begun to focus first on its domestic visitors to revive tourism. JKTDC Managing Director maintained (PTI, 2015) that, “Domestic travellers are the backbone of the state's tourism and JKTDC aims to focus on strengthening this segment. Our focus will be on family and meetings, incentives, conferencing, exhibitions (MICE) sector as there is enormous potential in both these areas”.

The state tourism also wants to revive its international markets. However, much water has flown down the Jhelum, since the rise of insurgency and the traditional tourist markets have disappeared while the contemporary market is yet to give cognizance to the tourist destinations in the state, especially, the Valley of Kashmir and Ladakh, which are more likely to attract international visitors. This study, therefore, is commissioned to uncover the purchasing behaviour of the foreign tourists who are visiting these two regions of the state.

2. Sample

The study was carried out in two phases. The phase one was restricted to a four-month period between March to June 2014. A smaller sample was collected over the four quarters of the year during the phase II between April 2015 and May 2016.

2.1 Sampling in Phase I

During the first phase of the survey, the data was collected at airports in Srinagar and Leh. The sample was drawn from international visitors visiting Srinagar during March to May 2014 and at Leh during May and June. There were very few visitors arriving in Leh by air during March and April. Respondents were interjected for responses as they reached the destination. In all, data was collected from 3716 respondents. Researchers rejected 107 responses and a sample size of 3627 was available. Of these 573 responses were considered invalid. Of these, a sample from Srinagar was 1437 (47.7%) while the sample from Leh was 1578 (52.3 %).

2.2 Sampling in Phase II

In Phase I, the data was collected from tourists arriving at the airports in Srinagar and Leh. The focus survey was to understand the product bundling by the international visitors. However, during the second phase, it was decided to collect responses at different points at the destinations where the tourists spent their time- such as hotels, attractions, transit points, etc.

Researchers also decided, during the second phase of the survey, to have inputs from visitors regarding their perceptions about attractions, accommodation, amenities and activities. Visitors could have assessed these once they have spent some time at the destination. Further, information about the type of tour package, the size of the tour group, and products sought were to be obtained. The questionnaire was thus modified accordingly. Information requested in the first phase was again asked for in the second phase also.

In the first phase, the responses were gathered only at the airports. Both these airports are defence airports and securing necessary permission for data collection was tough and cumbersome, particularly in the Leh airport.

Further, as the flight landed at these airports, the surveyors would approach the arriving travellers to fill the questionnaires many of whom belonged to the same tour group and therefore were likely to be from the similar demographic/psychographic background. Also, it was probable that the group members would have similar ratings and opinions about their experiences. In the second phase, therefore, the surveyors were instructed not to seek information from more than two respondents from the same tour party.

The research team noted that tourists were coming from land routes besides the air route. Many visitors used buses and private vehicles for getting into Valley of Kashmir. There is a significant number of visitors who bike into Ladakh or are using SUVs to arrive in Ladakh. These were seeking different tourism products and the character of the group also differed. However, earlier when the surveyors collected data only at the airports, it was skewed.

Further, it was also observed that while tourists were returning from a trip, they were less interested in filling in the questionnaires at airports as they were exhausted during departure and were in a different frame of mind. Therefore, in Phase II, it was decided to go on the field and cover various locations like hotels, attractions and transit points.

One of the limitations in collecting data was that not all visitors were conversant/comfortable with English. In the absence of tour interpreter for the group, it was difficult to elicit responses. Often the tour leaders would not permit or dissuade the tourists in their groups to give an answer.

During the second phase of the survey, the intention was to gather information regarding the perception of visitors on services received. It was also to be seen whether the data from the two phases corroborate. One may note that during the Phase I the data was collected across a narrow band of 4 months. In second phase, data was collected throughout the year and is presented as distributed over the four quarters. For the purpose of this study, the researchers defined the quarter on the basis of feedback from industry experts from the two destinations. The data for the phase II is

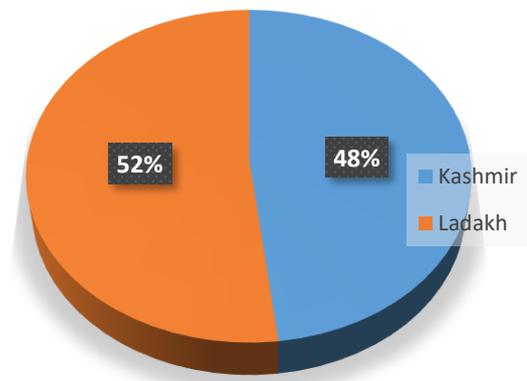
organised into quarters- April through June; July through September; October through December; and January through March. The study had 1332 responses in the second phase.

Table 2.1: Aggregated sample

<i>Location</i>	<i>Phase I</i>	<i>Phase II</i>	<i>Total</i>
Kashmir	1437	652	2089
Ladakh	1578	675	2253
TOTAL	3015	1327	4342

In each of the phases, Ladakh contributed 52 % of the sample.

Figure 2.1: The sample



The gender distribution of the sample is as in Table 2. The sample represents both the genders equally.

Table 2.2: Aggregated sample – gender distribution

<i>Location</i>	<i>Females</i>	<i>Males</i>	<i>Total</i>
Kashmir	(48.0%)	(52.0%)	2089
Ladakh	(49.4%)	(50.6%)	2253
TOTAL	(48.7%)	(51.3%)	4342

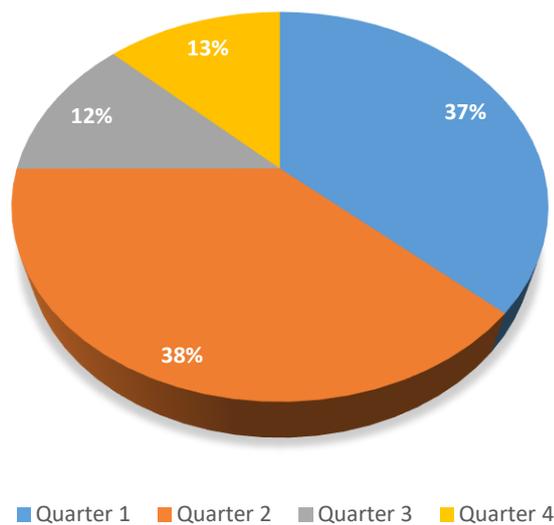
Research team faced several challenges in the collection of data at the two destinations. Srinagar witnessed two floods (September 2014 and March- April 2015), political unrest on account of issues in NIT Kashmir (April 2016) and several bandhs called by local groups and curfews imposed by the local administration. In Leh, the arrival of visitors during winters (December-January) was negligible. Many service providers (hotels and restaurants) kept their establishments closed during the harsher winters. It was tough

for the surveyors to find international travellers and have their consent for responses. The distribution in the sample during different quarters in phase II is as in Table 2.3 below:

<i>Duration of stay</i>	<i>Kashmir</i>	<i>Ladakh</i>	<i>Total</i>
Quarter 1	226	261	487
Quarter 2	224	284	508
Quarter 3	89	73	162
Quarter 4	113	57	170
TOTAL	652	675	1327

The quarterly samples were good enough in size to reflect on the perception of the international visitors about tourism services in the valley of Kashmir and Ladakh.

Figure 2.2: Quarter-wise distribution of the sample



2.3 Visitor package

63.8% of sampled international visitors visit Valley of Kashmir and Ladakh arrive as independent travellers. Percentage of visitors on a packaged tour to Ladakh (38.3 %) is slightly more than those coming in Valley of Kashmir (34.2%) on a packaged tour.

Table 2.4: Percentage of visitors at the destination arriving on packaged tour- according to purpose of visit

Purpose of visit→		<i>Nature</i>	<i>Adventure</i>	<i>Culture</i>	<i>Spiritual</i>	<i>Others</i>
Kashmir	<i>Package</i>	43.6%	23.0%	31.4%	40.0%	41.7%
	<i>Non-package</i>	56.4%	77.0%	68.6%	60.0%	58.3%
Ladakh	<i>Package</i>	39.1%	47.5%	26.5%	33.3%	62.5%
	<i>Non-package</i>	60.9%	52.5%	73.5%	66.7%	37.5%

1. The table may be read as- 43.6% of visitors to Kashmir for the purpose of enjoying nature take a packaged tour.
2. There were a negligible number of respondents within the sample for 'spiritual' and 'others' purposes to the two destinations.

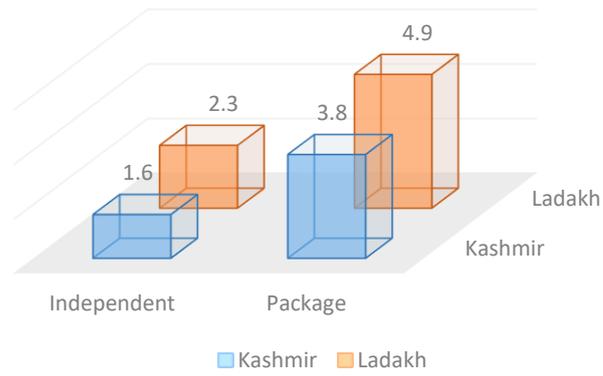
Thus, 43.6 % international travellers coming to Valley of Kashmir for enjoying nature seek packages for their visit; whereas, in Ladakh, it is tourists for adventure and nature who look for packaged tours. However, it must be understood that mainly, international travellers to both Valley of Kashmir and Ladakh, visit as independent travellers.

Table 2.5: Group size of travellers visiting Valley of Kashmir and Ladakh

Place	Average	
Kashmir	<i>Package</i>	3.8
	<i>Independent</i>	1.6
Ladakh	<i>Package</i>	4.9
	<i>Independent</i>	2.3
Total	<i>Package</i>	4.4
	<i>Independent</i>	1.9

The size of the group is relatively larger in Ladakh (Average size = 4.9) as compared to Valley of Kashmir (Average size = 3.8). Even the average size of the independently travelling group is greater in Ladakh (Average size = 2.3) as compared to Valley of Kashmir (Average size = 1.6).

Figure 2.3: Group size of travellers visiting Valley of Kashmir and Ladakh



3. International travellers' prioritisation

This chapter presents the purchase behaviour of foreign tourists visiting Ladakh and Valley of Kashmir.

3.1 Nationality of visitors

The popularity of the destination as visible in the overall sample, phases I and II taken together, is as following. Top ten visiting nationalities at the two destinations are given in the Table 3.1. Malaysians are top visitors to Valley of Kashmir. However, they do not figure in top ten for Ladakh. Ladakh is more popular than Valley of Kashmir with French and Americans. Thus, the two destinations attract different markets- though Americans, Britons and Thais are visiting both the destinations in decent numbers. Malays and Chinese are not among the top ten visitors to Ladakh; similarly, Japanese do not appear to be interested in Valley.

Table 3.1: Top 10 visiting nationalities - Phase I and II taken together

<i>Rank</i>	<i>Valley of Kashmir</i>		<i>Ladakh</i>	
	<i>Nationality</i>	<i>Nos.</i>	<i>Nationality</i>	<i>Nos.</i>
1	Malaysia	283	France	300
2	Thailand	281	USA	221
3	UK	190	Thailand	164
4	USA	169	Japan	164
5	France	94	UK	162
6	China	83	Germany	142
7	Australia	81	Switzerland	102
8	Germany	72	Canada	78
9	Singapore	62	Australia	75
10	South Africa	61	Russia	64

3.2 Purpose of Visit

Researchers now accept that that visitors often visit a destination for different reasons, rather than a single interest (Tisdell & Wilson, 2012)(Ready & Navrud, 2002). For example, while adventure can be one of the primary interest, a visitor would engage in other activities of leisure. Even the Adventure Travel Trade Association (ATTA) defines adventure tourism as a trip that includes at least two of the following three elements: physical activity, natural environment, and cultural immersion (UNWTO, 2014). Thus, adventure may include nature and culture as well.

	Quarter 1 <i>Apr- Jun</i>	Quarter 2 <i>Jul-Sept</i>	Quarter 3 <i>Oct-Dec</i>	Quarter 4 <i>Jan- Mar</i>
Valley of Kashmir				
Top 2 reasons →	1. Nature 2. Culture	1. Nature 2. Culture, adventure	1. Cultural 2. Adventure	1. Adventure 2. Nature
Top 5 visitors →	<i>1. USA</i> <i>2. UK</i> <i>3. Thailand</i> <i>4. Germany</i> <i>5. France, Australia</i>	<i>1. UK</i> <i>2. USA</i> <i>3. France</i> <i>4. Australia</i> <i>5. Germany</i>	<i>1. UK</i> <i>2. USA</i> <i>3. Australia</i> <i>4. France</i> <i>5. Canada</i>	<i>1. Russia</i> <i>2. UK</i> <i>3. USA</i> <i>4. Singapore</i> <i>5. Malaysia</i>
Ladakh				
Top 2 reasons →	1. Culture 2. Adventure	1. Adventure 2. Culture	1. Culture 2. Adventure	1. Adventure 2. Nature
Top 5 visitors →	<i>1. Japan</i> <i>2. Thailand</i> <i>3. UK</i> <i>4. France</i> <i>5. USA, Australia</i>	<i>1. France</i> <i>2. Israel</i> <i>3. Japan</i> <i>4. UK</i> <i>5. Germany</i>	<i>1. Korea</i> <i>2. Belgium</i> <i>3. USA</i> <i>4. Australia</i> <i>5. Italy</i>	<i>1. Thailand</i> <i>2. Canada</i> <i>3. Austria</i> <i>4. Belgium</i> <i>5. Germany</i>

While the Valley of Kashmir was popular among visitors for nature (40.5%) followed by adventure (30.7 %); Ladakh was popular for adventure (34.9%) followed by culture (31.4%). However, this varied with quarters. During the first three months, i.e., during April- June, nature was the top reason for visiting Kashmir Valley (48.7 %), followed by culture (23 %). It is in this quarter when the gardens in Valley of Kashmir are blossoming including the famous tulip show. Nature and culture continue to remain the top attractions in Valley of Kashmir through the second quarter (July to September). Kashmir hosts some festivals during this period- Kheer Bhawani Mela, Baisakhi, Cherry Festival (2nd week of May), Gurez festival (June). Adventure activities also pick up

towards the end of second quarter with Shikara festival and water sports festivals (July/ August). The advent of winters marks a fall in nature based tourism, while culture and adventure attract the visitors. October hosts the famous Saffron festival. As it snows in the valley, destinations like Gulmarg attracts skiers.

On the other hand, visitors were arriving in Ladakh in the first quarter for enjoying the culture (38.3 %). Culture dominates the attractiveness of Ladakh through first three quarters. The first two quarters host some of the well-known festivals in Ladakh – Hemis Festival (June), Zanskar festival (June), Sindhu Darshan (June), Ladakh Festival (September), etc. Adventure remains an attraction in Ladakh throughout the year. The domestic tourists are coming in large numbers, thereby providing the adventure tourism industry in Ladakh necessary muscle and professionalism. Being a centre for Buddhist order, Ladakh attracts a large number of visitors from Japan, Korea and Thailand.

Table 3.3: Distribution of foreign tourist by purpose of visit

	Quarter 1 <i>Apr- Jun</i>	Quarter 2 <i>Jul-Sept</i>	Quarter 3 <i>Oct-Dec</i>	Quarter 4 <i>Jan- Mar</i>
<i>Valley of Kashmir</i>				
Nature	48.7%	46.9%	25.8%	23.0%
Adventure	21.2%	25.4%	28.1%	61.9%
Culture	23.0%	25.4%	38.2%	14.2%
Spiritual	0.8%	1.3%	-	-
Others	6.3%	0.9%	7.9%	0.9%
<i>Ladakh</i>				
Nature	26.8%	24.1%	24.0%	29.1%
Adventure	27.6%	42.2%	31.0%	38.2%
Culture	38.3%	25.2%	39.4%	18.2%
Spiritual	6.5%	6.3%	-	3.6%
Others	0.8%	2.2%	5.6%	11.0%

3.3 Distribution of the duration of the stay of tourists

Some of the foreign visitors sampled at the chosen two destinations- Valley of Kashmir and Ladakh had been staying in India for a long time (for many years). For them, this visit was just a short vacation/ trip. It was, therefore, decided to divide the respondents into four groups. The first group were those who had been staying in India for a very long time (more than 61 days). Then were those, who remained in India for a long time

(31 to 60 days); and those who were in India for a short stay- less than 15 days; and, then those who stayed between 15 to 30 days.

Table 3.4: Distribution of sample based on duration of stay of tourists - aggregated

<i>Duration of stay on this trip</i> ↓	<i>Visitors at Srinagar</i>		<i>Visitors at Leh</i>		<i>Total</i>	
	<i>N</i>	<i>Average duration (in days)</i>	<i>N</i>	<i>Average duration (in days)</i>	<i>N</i>	<i>Average duration (in days)</i>
More than 61 days	111	288.1	155	136.0	266	199.5
31 to 60 days	113	47.6	189	47.1	302	47.3
16 to 30 days	378	23.0	504	22.2	882	22.5
15 days or less	1405	7.7	1261	9.2	2666	8.4

The above table is based on aggregated sample of survey in phase I and II

Thus, a vast number of people visiting the two places are here for a short stay of fewer than 15 days (64.8%). The average duration of stay of a foreign tourist in shorter stay categories (16 to 30 days, and less than 15 days) was 11.9 days. In the International Passenger Survey of 2012, carried out by Indian Statistical Institute (Sen Gupta, 2012) average stay of international tourist was reported as 10.65 days (Table 13, pg. 43). There were few 'long' and 'very long' staying foreign nationals included in the sample. In the first phase of the survey (Oct 2014), this average stay was 10.9 days. However, the sample of the second phase included a more of long and very long staying respondents.

3.4 Distribution of the duration of stay at the destinations

Very long staying foreign tourists (more than 61 days during this trip) visiting Valley of Kashmir tend to remain there for around 17 days (16.6 days) and are likely to spend around 7.4 days in Ladakh. Their stay in Jammu is very insignificant- less than a day. However, tourists visiting Ladakh tend to stay very long in Ladakh (around 38.3 days) but are likely to visit Valley of Kashmir for around three days (3.2 days). They may also spend two days (1.5 days) in Jammu. Thus, very long staying visitors in India while visiting Valley of Kashmir also tend to spend around a week in Ladakh while the vice versa may not be true. See Table 3.5.

Table 3.5: Stay of very long staying (more than 61 days) tourists (in number of days)

		<i>Stay in Kashmir</i>	<i>Stay in Ladakh</i>	<i>Stay in Jammu</i>
Visiting Kashmir	<i>Average</i>	16.6	7.4	0.6
	<i>N</i>	111	111	111
Visiting Ladakh	<i>Average</i>	3.2	38.3	1.5
	<i>N</i>	155	155	155

Table 3.6 suggests that long staying (31 to 60 days) foreign tourists visiting Valley of Kashmir tend to stay there for around 11 days and are likely to spend around three days in Ladakh. Their stay in Jammu is very insignificant- less than half a day. However, tourists visiting Ladakh tend to stay there very long (around 25.4 days) and are likely to visit Valley of Kashmir for around one day (1.2 days). They may also spend half a day (0.5 days) in Jammu.

Table 3.6: Stay of longer staying (31 to 60 days) tourists (in number of days)

		<i>Stay in Kashmir</i>	<i>Stay in Ladakh</i>	<i>Stay in Jammu</i>
Visiting Kashmir	<i>Average</i>	11.0	3.3	0.2
	<i>N</i>	113	113	113
Visiting Ladakh	<i>Average</i>	1.2	25.4	0.5
	<i>N</i>	189	189	189

Tourists on a trip between 16 to 30 days are focused though the pattern remains the same. Those arriving at Valley of Kashmir on average stay for 7.0 days with one and a half day in Ladakh or negligible stay Jammu. Those arriving at Leh on average stay for 14.6 days with a very short stay in Jammu. They may visit Valley of Kashmir for one day.

		<i>Stay in Kashmir</i>	<i>Stay in Ladakh</i>	<i>Stay in Jammu</i>
Visiting Kashmir	<i>Average</i>	7.2	1.6	0.2
	<i>N</i>	378	378	378
Visiting Ladakh	<i>Average</i>	1.1	14.6	0.3
	<i>N</i>	504	504	504

Shorter staying tourists arriving in Valley of Kashmir are less focused as compared to those visiting Ladakh. While those visiting Valley of Kashmir on average stay for five days, they are likely to travel to Ladakh for three days. They do not go to Jammu. Those visiting Ladakh stay on average for 7.6 days with very short stays in Kashmir or Jammu.

		<i>Stay in Kashmir</i>	<i>Stay in Ladakh</i>	<i>Stay in Jammu</i>
Visiting Kashmir	<i>Average</i>	5.0	3.2	0.1
	<i>N</i>	1405	1405	1405
Visiting Ladakh	<i>Average</i>	0.5	7.6	0.1
	<i>N</i>	1261	1261	1261

Thus, it is evident that in the case of shorter staying tourists, the stay of visitors in Ladakh is more than the stay of visitors to Valley of Kashmir. Visit to Ladakh requires at least a days' rest for acclimatisation. Another thing that emerges from above data is that while visitors to Valley of Kashmir may spend some time in Ladakh, the vice versa may not be true. Visitors to Ladakh are more focused as compared to those arriving in Valley of Kashmir.

3.5 Prioritisation of visit to Ladakh/ Valley of Kashmir

Table 3.9: Prioritisation of visit to the state of J&K

<i>Duration of this trip to India</i>	<i>Duration of stay in India</i>		<i>Duration of stay in state of Jammu & Kashmir</i>		<i>Data collected at</i>	<i>Distribution of stay in the state (in no. of days)</i>				
	<i>N</i>	<i>Average stay in India (in days)</i>	<i>Average stay in J&K (in days)</i>	<i>Proportion of stay</i>		<i>N</i>	<i>Total</i>	<i>Stay in Kashmir</i>	<i>Stay in Ladakh</i>	<i>Stay in Jammu</i>
More than 61 days	266	199.5	35.3	17.7 %	Kashmir	111	24.6	16.6	7.4	0.6
					Ladakh	155	43.0	3.2	38.3	1.5
31 to 60 days	302	47.3	22.5	47.6 %	Kashmir	115	14.5	11.0	3.3	0.2
					Ladakh	189	27.1	1.2	25.4	0.5
16 to 30 days	882	22.2	13.1	58.2 %	Kashmir	378	9.0	7.2	1.6	0.2
					Ladakh	504	16.1	1.2	14.6	0.3
15 days or less	2666	8.4	8.3	98.8 %	Kashmir	1405	8.3	5.0	3.2	0.1
					Ladakh	1261	8.2	0.5	7.6	0.1

Based on the earlier discussion, assessment was made of the proportion of time spent in the state of Jammu and Kashmir by the visitors sampled for the study. As the duration of the total trip to India increases, the proportion of time spent in the state of Jammu and Kashmir decreases. In other words, tourists visiting the state during a short visit to India are focused in the sense, that they tend to visit the state purchased and no other visits. Those who are in India for less than 15 days spend around 98.8 % of their time in the state. Travelling to and from the state accounts for the balance time. But as the stay in India increases, the tourist may purchase visit to other destinations as well.

3.6 Visit to other destinations within India

The following table summarises the visits of travellers sampled to other places in India. Many respondents did not indicate their choices against these questions. Further, since the number of respondents indicating their choice of a visit to a particular destination was small for very long and long-staying tourists, the two categories were merged for further analysis. Thus, we have divided the respondents into three categories- trips for more than 30 days (which includes trips between 31 to 60 days and those more than 60 days), trips between 30 to 16 days and trips less than 15 days. Table 3.10 profiles the visit of international tourists to other destinations within India (only phase I).

Table 3.10: Profile of visits to other destinations within India

			<i>Trip > 30 days</i>		<i>Trip: 30 to 16 days</i>		<i>Trip < 15 days</i>	
			<i>Srinagar</i>	<i>Leh</i>	<i>Srinagar</i>	<i>Leh</i>	<i>Srinagar</i>	<i>Leh</i>
Visit to Agra	No	% age	33.3 %	73.1 %	41.2 %	70.6 %	39.9 %	76.0 %
	Yes	% age	66.7 %	26.9 %	58.8 %	29.4%	60.1 %	24.0 %
	Total	Count	108	201	194	326	1131	1049
Visit to Rajasthan	No	% age	45.0 %	77.6 %	70.9 %	89.3 %	72.9 %	86.5 %
	Yes	% age	55.0%	22.4 %	29.1 %	10.7 %	27.1 %	13.5 %
	Total	Count	109	201	196	326	1131	1051
Visit to Goa	No	% age	38.5 %	86.1 %	68.4 %	93.9 %	80.6 %	90.3 %
	Yes	% age	61.5 %	13.9 %	31.6 %	6.1 %	19.4 %	9.5 %
	Total	Count	109	201	196	326	1132	1051
Visit to Kerala	No	% age	64.2 %	86.6 %	84.7 %	95.7 %	89.0 %	92.5 %
	Yes	% age	35.8 %	13.4 %	15.3 %	4.3 %	11.0 %	7.5 %
	Total	Count	109	201	196	326	1132	1051
Visit to other places in India	No	% age	76.1 %	59.0 %	68.9 %	65.3 %	73.7 %	61.0 %
	Yes	% age	23.9 %	41.0 %	31.1 %	34.7 %	26.3 %	39.0 %
	Total	Count	109	200	196	326	1131	1047

Visitors to Ladakh appear to be more focused in that they are not buying other destinations along with their visit to Ladakh. At the most, it is fewer than 30 % of all cases. However, purchase of destination also appears to be affected by distance and access. Thus, Agra is the most popular destination to be in the shopping basket followed by Rajasthan, Goa and Kerala in that order for visitors from all categories of stay (long, medium and short stays). As a contrast to this, visitors to Valley of Kashmir

are more likely to purchase visit to other destinations. In all categories and cases, visitors to Valley of Kashmir are more liable to buy another destination as compared to visitors to Ladakh. However, in the case of Valley of Kashmir also, it is affected by distance and access, thus- Agra is the most popular destination to be in the purchase basket followed by Rajasthan, Goa and Kerala in that order.

The data from phase II suggested that in the case of Valley of Kashmir, Agra is the most preferred destination to travel along with the valley and more so in the event of shorter staying (less than 15 days) and moderate duration staying (15 to 30 days) tourists. However, in the case of longer duration (30 to 60 days) and very long duration staying (more than 60 days), Rajasthan emerged as a popular destination. In the case of Ladakh, the same trend was visible. Overall, it appears that distance including accessibility is the criterion. Even in phase II of study, Agra seems to be the most popular destination in the purchase basket followed by Rajasthan, Goa, and Kerala in that order.

Table 3.11: Check-sheet of international visitors travelling to select cities

	Valley of Kashmir				Ladakh			
	<i>Shorter staying tourist</i>	<i>Moderate duration staying tourist</i>	<i>Long staying tourists</i>	<i>Very long staying tourist</i>	<i>Shorter staying tourist</i>	<i>Moderate duration staying tourist</i>	<i>Long staying tourists</i>	<i>Very long staying tourist</i>
Agra	188	61	10	6	114	52	9	10
Kerala	20	10	2	3	16	3	4	2
Rajasthan	138	49	17	12	89	32	28	13
Goa	26	12	3	6	20	4	4	5

3.7 Other popular destinations

Researchers evaluated selected four destinations- Agra, Rajasthan, Goa and Kerala. Besides these, they also considered other destinations outside the state of Jammu and Kashmir which were popular among the sampled respondents as reflected in their open-ended choices. The same were freelisted and the top destinations among their choices were as following:

Table 3.12: Popular destinations outside the state and besides the chosen four destinations (Phase I and II taken together)

<i>Srinagar</i>			<i>Leh</i>		
<i>Rank</i>	<i>Destination</i>	<i>Nos.</i>	<i>Rank</i>	<i>Destination</i>	<i>Nos.</i>
1	Delhi	488	1	Delhi	473
2	Himachal Pradesh	120	2	Himachal Pradesh	138
3	Varanasi*	85	3	Uttarakhand	51
4	Maharashtra	68	4	Varanasi	46
5	Amritsar*	57	5	Maharashtra	36
6	Chandigarh	54	6	Tamil Nadu	25
7	Uttarakhand	29	7	Karnataka	25
8	Chandigarh	17	8	Amritsar*	21

* Study has retained Amritsar and Varanasi on the list along with states as this appeared specifically in the choices

Delhi seems to be the most important destination for the visitors followed by Himachal Pradesh. Delhi is the gateway to north India and for many visitors, it is the port of disembarkment. Varanasi is also important for visitors to both Valley of Kashmir and Ladakh.

This information is based on open-ended responses. The respondents returned what was in their mind. While on all occasions when they referred to a state, they made particular reference to two cities in particular- Amritsar and Varanasi- since these frequently appeared in responses the same have been included.

3.8 Visit to other destinations outside India

The following table summarises the visits of travellers sampled to other places outside India during this visit. Respondents were offered five choices to choose from – Nepal, Bhutan, Sri Lanka, Bangladesh and others. Many respondents did not indicate their choices against these questions.

Table 3.13: Profile of visits to other destinations outside India in South Asia

			<i>Trip > 30 days</i>		<i>Trip: 30 to 16 days</i>		<i>Trip < 15 days</i>	
			<i>Srinagar</i>	<i>Leh</i>	<i>Srinagar</i>	<i>Leh</i>	<i>Srinagar</i>	<i>Leh</i>
<i>Visit to Nepal</i>	<i>No</i>	<i>% age</i>	74.1	74.7	87.0	84.5	87.2	89.5
	<i>Yes</i>	<i>% age</i>	25.9	25.3	13.0	15.5	12.8	10.5
	<i>Total</i>	<i>Count</i>	224	344	378	504	1405	1261
<i>Visit to Bhutan</i>	<i>No</i>	<i>% age</i>	98.7	96.8	98.4	97.6	94.3	98.4
	<i>Yes</i>	<i>% age</i>	1.3	3.2	1.6	2.4	5.7	1.6
	<i>Total</i>	<i>Count</i>	224	344	378	504	1405	1261
<i>Visit to Sri Lanka</i>	<i>No</i>	<i>% age</i>	92.0	91.9	97.1	97.2	93.2	96.4
	<i>Yes</i>	<i>% age</i>	8.0	8.1	2.9	2.8	6.8	3.6
	<i>Total</i>	<i>Count</i>	224	344	378	504	1405	1261
<i>Visit to Bangladesh</i>	<i>No</i>	<i>% age</i>	97.0	96.2	98.9	99.0	96.5	98.5
	<i>Yes</i>	<i>% age</i>	3.0	3.8	1.1	1.0	3.5	1.5
	<i>Total</i>	<i>Count</i>	224	344	378	504	1405	1261
<i>Visit to other places outside of India</i>	<i>No</i>	<i>% age</i>	93.3	89.2	93.4	92.1	95.2	94.5
	<i>Yes</i>	<i>% age</i>	6.7	10.8	6.6	7.9	4.8	5.5
	<i>Total</i>	<i>Count</i>	224	344	378	504	1405	1261

In general, only a few visitors are buying other destinations along with their current visit. A closer look suggests that short stay visitors to Valley of Kashmir are buying other destinations more often than those visiting Ladakh. Only in the case of visitors staying longer in Ladakh, they tend to buy travel to Nepal and Bhutan more than the travellers to Srinagar. Overall, Nepal appears to be the holiday choice for visitors sampled for this study followed by Sri Lanka, Bangladesh and Bhutan in that order.

3.9 Other popular destinations

Researchers evaluated the other destinations outside India and besides the selected four destinations of South Asia – Nepal, Bhutan, Sri Lanka and Bangladesh. These were considered popular among the sampled respondents as reflected in their open-ended choices. The same were free listed, and the top destinations among their choices were as following:

Table 3.14: Popular destinations outside the India and South Asia

<i>Srinagar</i>			<i>Leh</i>		
<i>Rank</i>	<i>Destination</i>	<i>Nos.</i>	<i>Rank</i>	<i>Destination</i>	<i>Nos.</i>
1	Thailand	18	1	Thailand	34
2	China	9	2	Malaysia	14
3	Singapore	9	2	Myanmar	15
3	UAE	8	3	Vietnam	13
5	Saudi Arabia	6	3	Japan	10

Very few respondents have reported that they had purchased other destinations along with their visit to Valley of Kashmir and Ladakh. Within the small number of respondents who have bought a visit to a destination outside India and South Asia along with Valley of Kashmir and Ladakh, Thailand appears to be the most popular destination. An international visitor would like to visit destinations that are a short haul from India.

3.10 Stay of visitors outside of India on the trip

Visitors spend a significant time outside India during their trip to India. This means that they purchase other destinations along with their visits to India.

Table 3.15: Percentage of time spent in India and outside of India*

<i>Duration of stay</i>	<i>N</i>	<i>Total duration of trip (days)</i>	<i>Proportion of time spent in India (%)</i>	<i>Proportion of time spent out of India (%)</i>
<i>Visitors to Valley of Kashmir</i>				
15 days or less	31	25.8	42.2 %	57.8 %
16 to 30 days	36	55.0	46.5 %	53.5 %
31 to 60 days	18	76.3	65.9 %	34.1 %
More than 60 days	19	265.0	56.8 %	43.2 %
<i>Visitors to Ladakh</i>				
15 days or less	29	24.2	40.9 %	59.1 %
16 to 30 days	31	60.1	63.1 %	36.9 %
31 to 60 days	27	104.7	56.8 %	43.2 %
More than 60 days	21	274.6	43.2 %	56.8 %

* Based on data collected during the second phase of the survey. Respondents were reluctant to share this information. There was a small response to this variable.

4. Tourism services

Tourists visit the two destinations for a variety of reasons. They visit these destinations at different times of the year and the trips are also organised differently. Their expectations from the suppliers of tourism services at these destinations compared to their perception of what they got at these destinations determine their perception of quality. Over a period, this perception generalises for a destination. What customer expects, what they seek, and what they buy, would to a large extent depends on this perception. One of the important agenda for the survey in Phase II was to gather information on the quality of tourism products and services available to visitors at the two destinations.

Visitors were asked to rate their experience across the six chosen dimensions. These dimensions were- *attractions, lodging and boarding, access, safety and security, amenities, and activities* at the destination. These dimensions were chosen based on expert opinions given the backdrop of these two destinations- Valley of Kashmir and Ladakh.

Attractions referred to the built, the natural and the cultural heritage of the destinations. It is the subject of interest at a destination typically for its inherent or exhibited natural or cultural value, historical significance, natural or built beauty, offering leisure, adventure or amusement.

A leisure trip entails people spending real time with family and friends along with exploring the destination. Comfortable hotels and accommodation facilities play a crucial role in popularising any tourist destination. The Ministry of Tourism, Government of India, also noted that hotels are an important component of the tourism product. They contribute to the overall tourism experience through the standards of facilities and services offered by them (Ministry of Tourism, GoI, 2009). The United Nations Conference on International Travel and Tourism held in 1963, acknowledged the importance of accommodation, both traditional (hotel, motel) and supplementary (camps, youth hostels and so on) as incentives to international tourism. Lodging and boarding in this study referred to the quality of hotels and restaurants at the destinations.

One of the major foundations of tourism is the travel or transport component. A destination is in many respects defined by its ability to provide appropriate visitor access into a destination and dispersal throughout the destination (Sustainable Tourism Online, n.d.). The portal further maintains that the dispersal of visitors throughout a region can provide economic and social benefits including improved services to the host community. For this study 'access' referred to the ease of getting to the destination. Transportation should be regular, comfortable, economical and safe. Satisfaction with 'access' also denotes to the availability of options for transportation like airlines, railways, surface (road transport), etc.

Safety and security are vital to providing quality in tourism. More than any other economic activity, the success or failure of a tourism destination depends on being able to provide a safe and secure environment for visitors (WTO, 1996). Safety and security have always been an indispensable condition for travel and tourism. It is an incontestable fact that safety and security issues gained a much greater importance in the last two decades in tourism (Kôvári & Zimányi). Perceived safety and security can be concerns both in the Valley of Kashmir and Ladakh. The unrest in Kashmir valley is of concern to the visitors. Even during the period of this study, there were several occasions when either a bandh¹ was called or a curfew was imposed. Many countries have issued advisories to their citizens not to travel to Kashmir or to observe caution while visiting Kashmir. Thus, there is a perception of threat associated with a visit to Valley of Kashmir. There are health-related concerns associated with travel to high altitude Ladakh. Given the altitude, travellers to Ladakh are confronted with Acute Mountain Sickness (AMS). With proper rest to acclimatise, this can be overcome, but fears and anxiety persist. In this study, safety and security were about general perception to personal safety at the two destinations.

Amenities refer to facilities available to visitors at a destination. Amenities are services that most visitors take for granted until they are not there: visitor information centres, telecommunications, roads, drinking water, toilet blocks, rubbish bins, signages, park benches, etc. A community that provides attractions but no amenities is unlikely to maximise economic benefit from tourists (Assessing the "Product", 2015). Generally speaking, tourism amenities are structures and facilities that are put in place so as to

¹ Bandh means call for closure, normally by protesting groups

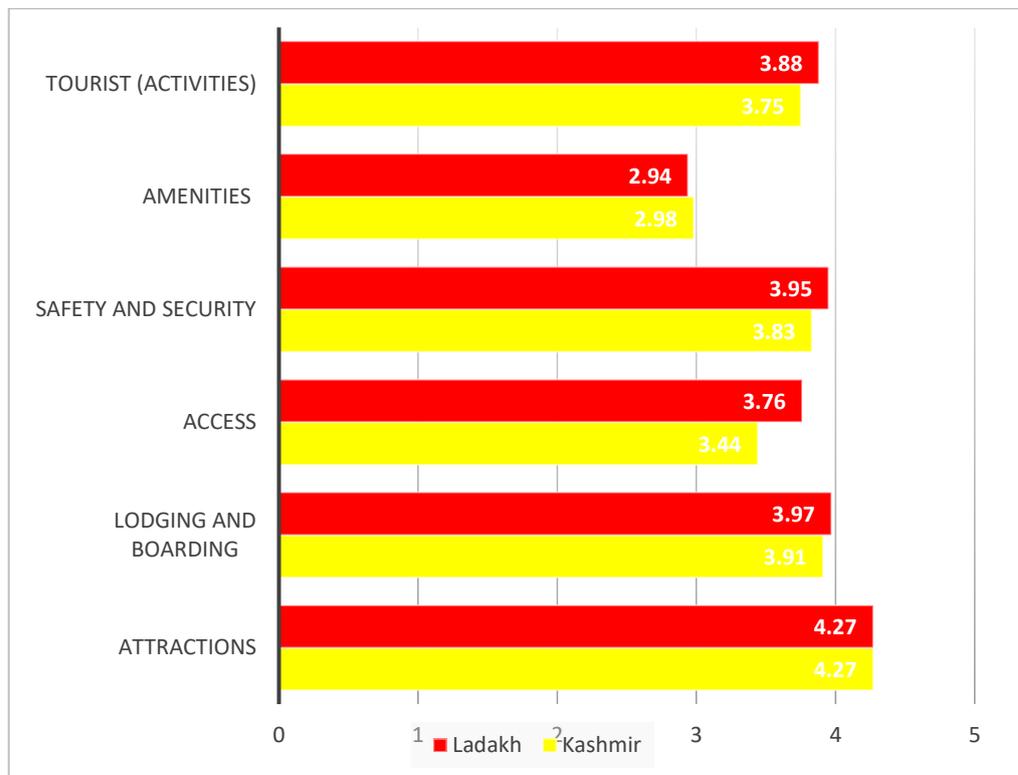
accommodate visitors. They are elements which will bring comfort and convenience to the tourists like resorts, cars, houses and so on. However, for this study amenities referred to availability and access to utilities like the internet, posts, banks/ ATMs, power supply, etc. at the two destinations. It does not include the accommodation component.

Attractions often include activities at the destinations. Activities are attractions for many tourists. However, for this study, researchers have differentiated between attractions and activities. While attractions refer to the built, the natural and the cultural heritage of the destinations; activities referred to tourist related events, fairs and festivals, and outdoor activities at the destination. Both Ladakh and Valley of Kashmir are known for their cultural festivals and outdoor events.

4.1 Comparison of services in Ladakh and Valley of Kashmir

Satisfaction with tourist services follows the same trend in both the destinations.

Figure 4.1: Comparison of services in Valley of Kashmir and Ladakh



The respondents were asked to rate their experience with these six dimensions of their stay on a five-point scale with 5 as 'very good' and 1 as 'very bad'.

Table 4.1: Difference in Tourist Services in Ladakh and Valley of Kashmir

Attractions	Significant
Boarding and lodging	Significant
Access (transport)	Not Significant
Safety and security	Not Significant
Amenities	Significant
(Tourist) Activities	Not Significant

** Based on Independent sample t-Test for different tourist services at Ladakh and Valley of Kashmir. Difference significant at 0.05 (For details, see Table A4.1 in Annexure)*

The perception of the tourists vis-à-vis the above six dimensions was similar at the two destinations. The visitors both in Valley of Kashmir and in Ladakh, rated attractions as the best (4.27) followed by boarding and lodging (3.95), safety and security (3.89), tourist activities (3.81), access (3.61) and amenities (2.96). Interestingly, the ranking of the six dimensions was same for both Ladakh and Valley of Kashmir.

However, an independent sample t-Test for the difference in average scores for the six tourist service dimensions at the two destinations reveals, that there was a significant perceived difference in three out of six dimensions- safety and security, tourist activities, and access. International visitors felt safety and security at Ladakh better as compared to Valley of Kashmir. Same can also be understood from the fact that there were some cases of natural disasters and political unrest in Valley of Kashmir during the study period. Similarly, festivals and events in Ladakh are popular even at an international level. The events are organised in large number and throughout the year. Visitors get a chance to participate in these culturally distinct festivals. Respondents rated activities in Ladakh better than those in the Valley of Kashmir.

4.2 Difference in services in different quarters

Researchers analysed if the perception of international visitors for the six dimensions of the tourism services varied with the four chosen quarters. Table 4.2 suggests that there is a significant difference in the perception of the international visitors for tourism

services who visit in different quarters. There is no significant difference in the perception about attractions at the two destinations across the four quarters.

Table 4.2: Difference in visitor perception of services across the four quarters

Attractions	Significant
Boarding and lodging	Not Significant
Access (transport)	Not Significant
Safety and security	Not Significant
Amenities	Not Significant
(Tourist) Activities	Not Significant

** Based on ANOVA for difference in mean visitor perception of services in four quarters Significant at 0.05 (For details, see Table A4.2 in Annexure)*

As in Table 3.2 the purpose of visiting the two destination changes as the year (time) rolls. Thus, the priority of the visitors changes with the quarter. For example, while nature and culture predominate the purpose of visit in the first and second quarters in Valley of Kashmir, culture and adventure take over in the third quarter while adventure becomes the dominant reason for visit in the fourth quarter and the first quarter of the year when many tourists are seeking snow and related adventure. However, in the case of Ladakh, the visitations are restricted to culture and adventure.

Thus, it is amply clear that the two destinations are differently positioned and are therefore, targeted at different segments of international visitors. Table 3.2 also reveals the nationalities that are coming in various quarters at the two destinations. Understandably, the various segments of visitors, owing to the differences in their background and interest in the chosen destination have a different perception of the quality of services available at the two destinations.

Further, it was observed that the demand for tourism varies across the four quarters, and therefore the suppliers may also try to moderate the supply and the depth and range of services they offer.

Table 4.3: Average of perception for tourism services at the two destinations across four quarters

	Quarter 1 <i>Apr- Jun</i>	Quarter 2 <i>Jul-Sept</i>	Quarter 3 <i>Oct-Dec</i>	Quarter 4 <i>Jan- Mar</i>
Valley of Kashmir				
Top 2 reasons →	1. Nature 2. Culture	1. Nature 2. Culture, adventure	1. Cultural 2. Adventure	1. Adventure 2. Nature
<i>Boarding and Lodging</i>	3.84	3.93	4.05	3.97
<i>Access (Transport)</i>	3.44	3.35	3.33	3.73
<i>Safety and security</i>	3.88	3.75	3.80	3.93
<i>Amenities</i>	3.04	2.99	2.72	3.05
<i>(Tourist) activities</i>	3.90	3.99	3.21	3.39
Ladakh				
Top 2 reasons →	1. Culture 2. Adventure	1. Culture 2. Adventure	1. Culture 2. Adventure	1. Culture 2. Adventure
<i>Boarding and Lodging</i>	4.09	3.81	3.99	4.21
<i>Access (Transport)</i>	3.81	3.65	3.76	4.05
<i>Safety and security</i>	3.97	3.84	4.08	4.21
<i>Amenities</i>	3.11	2.74	2.81	3.26
<i>(Tourist) activities</i>	4.02	3.76	3.90	3.79

1. There was no significant difference in perception of attractions across the four quarters, and so it has not been listed here

The second quarter is the peak season in Ladakh with demand for tourism services being high. This demand puts some pressure on services and therefore the quality is compromised. Same is reflected in the perception of respondents. In the case of Valley of Kashmir, the third quarter (Oct- Dec) is a low season. Boarding and lodging facilities are available in abundance, and so they are rated better. However, during the same period, access, amenities and activities are at a low due to low demand. Further, in the fourth quarter, the tourism in Valley of Kashmir is adventure driven, and this segment of visitors, perceive services as better compared to the visitors in first and second quarters who are primarily seeking cultural elements. There are some festivals in Valley of Kashmir in these quarters and so the higher score of ‘activities’ in these quarters.

4.3 Difference in services for package groups and independent travellers

Do visitors who buy a package and those who travel independently to these two destinations, view the services differently? And is the difference statistically significant? Results are presented in Table 4.4.

Table 4.4: Difference in different tourist services for those with package and those without it at the two destinations- Ladakh and Kashmir Valley

	<i>Valley of Kashmir</i>	<i>Ladakh</i>
Attractions	Significant	Significant
Boarding and lodging	Significant	Significant
Access (transport)	Not Significant	Significant
Safety and security	Significant	Significant
Amenities	Significant	Significant
(Tourist) Activities	Significant	Significant

** Based on independent sample t-Test for different tourist services for those with package and those without it at the two destinations. Significant at 0.05 (For details, see Table A4.4 in Annexure)*

Interestingly in Valley of Kashmir, the two groups- those who have purchased a package to visit and those who arrive as independent travellers do not find a difference in five out of six services- attractions, boarding and lodging, safety and security, amenities and activities. Only in the case of access, there is a significant difference. Suppliers club services at the destination in the package, and so they are readily available to the package buying visitors. Even the independent travellers can book hotel online and attractions remain the same. The amenities and activities at the destination remain the same for the two groups. The real challenge comes from access which is transport to the destination and travel at the destination. While, these are pre-arranged in the case of a package, it is a challenge for the independent travellers. However, in the case of Ladakh, while there is no significant difference in activities, amenities, and safety and security for the visitors who have purchased a package and those who are travelling independently; a significant difference is reported in the case of attractions, boarding lodging and access.

4.4 Perception of important segments

Researchers wanted to establish if the opinion of top ten visiting nationalities was same for the six tourism services.

In case of Valley of Kashmir, the averages of the service ‘perception’ ratings are given in Table 4.5.

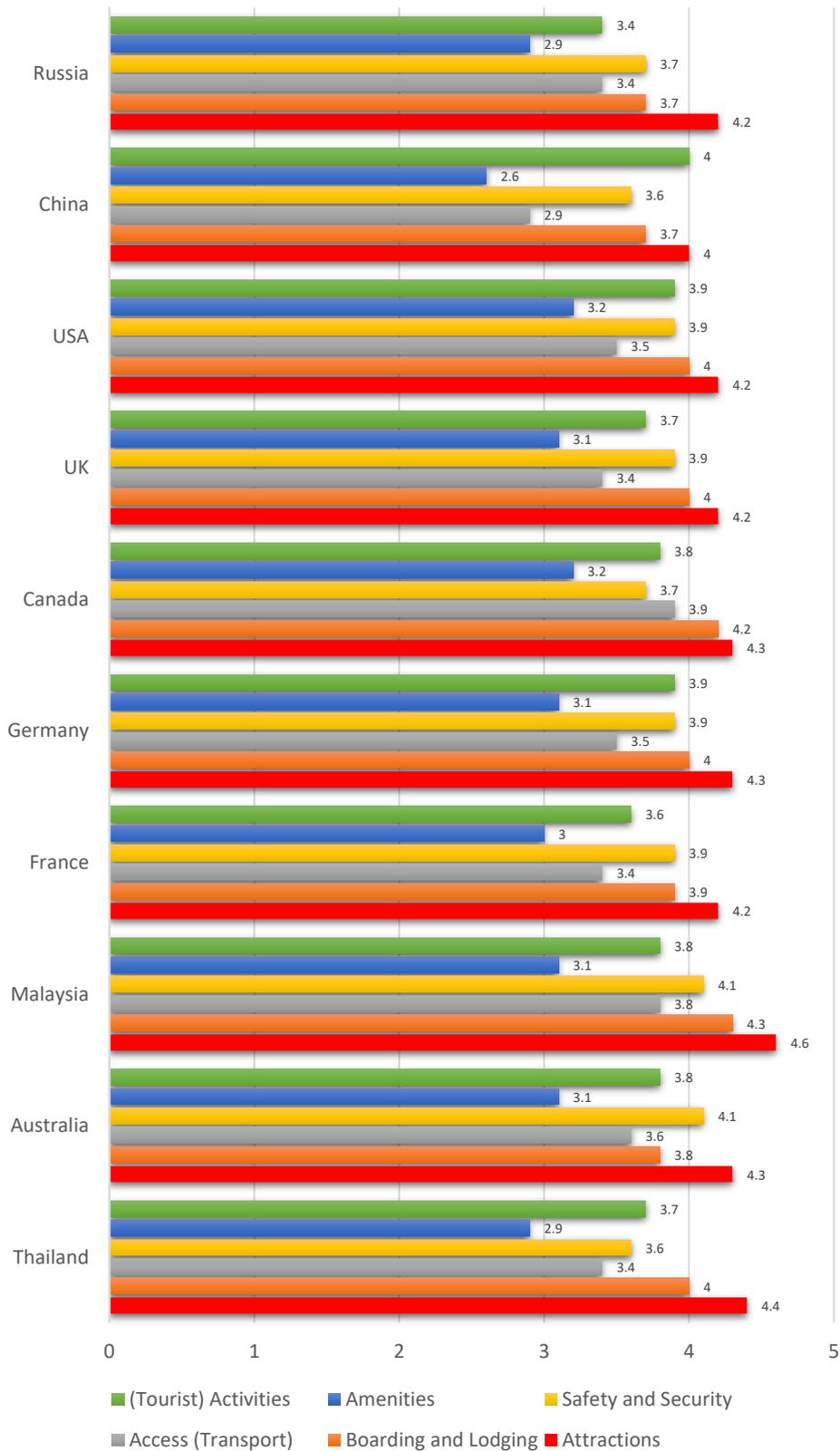
Table 4.5: Average score of ratings on six tourism dimensions for top 10 visiting nationalities at Valley of Kashmir (Phase II of Survey)

	Nationality	Attractions	Boarding and Lodging	Access (Transport)	Safety and Security	Amenities	(Tourist) Activities
1	Thailand	4.4	4.0	3.4	3.6	2.9	3.7
2	Australia	4.3	3.8	3.6	4.1	3.1	3.8
3	Malaysia	4.6	4.3	3.8	4.1	3.1	3.8
4	France	4.2	3.9	3.4	3.9	3.0	3.6
5	Germany	4.3	4.0	3.5	3.9	3.1	3.9
6	Canada	4.3	4.2	3.9	3.7	3.2	3.8
7	UK	4.2	4.0	3.4	3.9	3.1	3.7
8	USA	4.2	4.0	3.5	3.9	3.2	3.9
9	China	4.0	3.7	2.9	3.6	2.6	4.0
10	Russia	4.2	3.7	3.4	3.7	2.9	3.4
	Average	4.3	3.9	3.4	3.8	3.0	3.8

To determine, whether there is a significant difference in the perception of visitors of different nationalities vis-à-vis the six tourism dimensions, ANOVA was applied. The results are presented in Table 4.6.

The difference in perception was significant for two of the dimensions- Boarding and lodging and Access (Transport). Australians (ranked 2nd), Chinese and Russians have rated boarding and lodging relatively low. Chinese are finding access to Valley of Kashmir difficult. Similarly, nationals of Thailand (Rank 1st), France, UK and Russia are also finding access challenging.

Figure 4.2: Six tourism dimensions for top 10 visiting nationalities at Valley of Kashmir (Phase II of Survey)



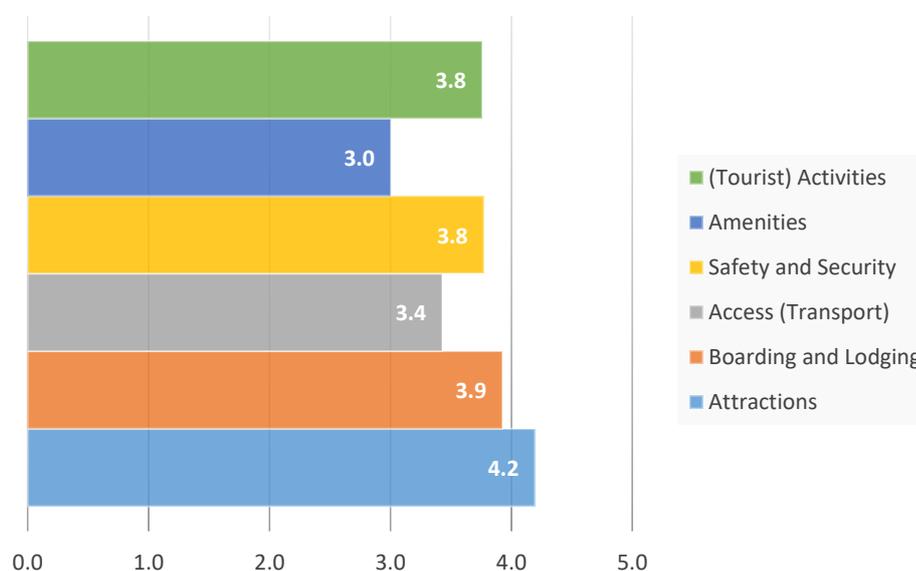
Comparative performance of the six tourism service dimensions in Valley of Kashmir as perceived by the top ten visiting nationalities is as given below:

Table 4.6: Difference in visitor perception of top 10 visiting nationalities to Valley of Kashmir services vis-à-vis the six tourism dimensions

Attractions	Significant
Boarding and lodging	Not Significant
Access (transport)	Not Significant
Safety and security	Significant
Amenities	Significant
(Tourist) Activities	Significant

* Based on ANOVA for difference in average visitor perception of top 10 visiting nationalities to Kashmir services vis-à-vis the six tourism dimensions Significant at 0.05 (For details, see Table A4.6 in Annexure)

Figure 4.3: Comparative ratings of six tourism dimensions for top 10 visiting nationalities at Valley of Kashmir (Phase II of Survey)



The visitors from top ten visiting nationalities have rated the attractions in Valley of Kashmir (4.2 on a 5-point scale) better than any other services. However, amenities (3.0) and access (transport) (3.4) are rated relatively poor.

In case of Ladakh the perception of top ten visiting nationalities vis-à-vis the chosen six tourism service dimensions are as given below:

Table 4.7: Average score of ratings on six tourism dimensions for top 10 visiting nationalities at Ladakh (Phase II of Survey)

	Nationality	Attractions	Boarding and Lodging	Access (Transport)	Safety and Security	Amenities	(Tourist) Activities
1	Thailand	4.2	3.6	3.5	3.7	2.9	3.9
2	Korea	4.2	3.8	3.6	4.0	2.7	3.7
3	Belgium	4.3	3.7	3.8	3.7	2.5	4.1
4	France	3.9	3.7	3.7	3.6	2.7	3.9
5	Germany	3.9	3.9	3.8	4.0	3.0	3.8
6	UK	4.4	4.3	4.0	4.2	3.3	3.7
7	USA	4.6	4.4	4.1	4.2	3.4	4.0
8	Austria	4.6	4.2	4.0	4.4	3.4	4.1
9	Israel	4.0	3.6	3.5	3.6	2.8	3.9
10	Japan	4.2	4.1	3.6	3.9	2.9	4.0
	AVERAGE	4.3	4.1	3.8	4.0	3.1	3.9

To determine, whether there is a significant difference in the perception of visitors of different nationalities vis-à-vis the six tourism dimensions, ANOVA was applied. The results are presented in Table 4.8.

In the case of Ladakh, the difference in rating of services by the different top ten visiting nationalities was significant in the case of five out of six dimensions- attractions, boarding and lodging, access (transport), safety and security and amenities. Thai nationals (ranked 1st) and Israelis' rated boarding and lodging low; Thais' and Israelis' also had challenges with access (transport). French and Israelis also considered safety and security an issue in Ladakh. Belgians, Korean and French also rated amenities relatively lower.

Figure 4.4: Six tourism dimensions for top 10 visiting nationalities at Ladakh (Phase II of Survey)

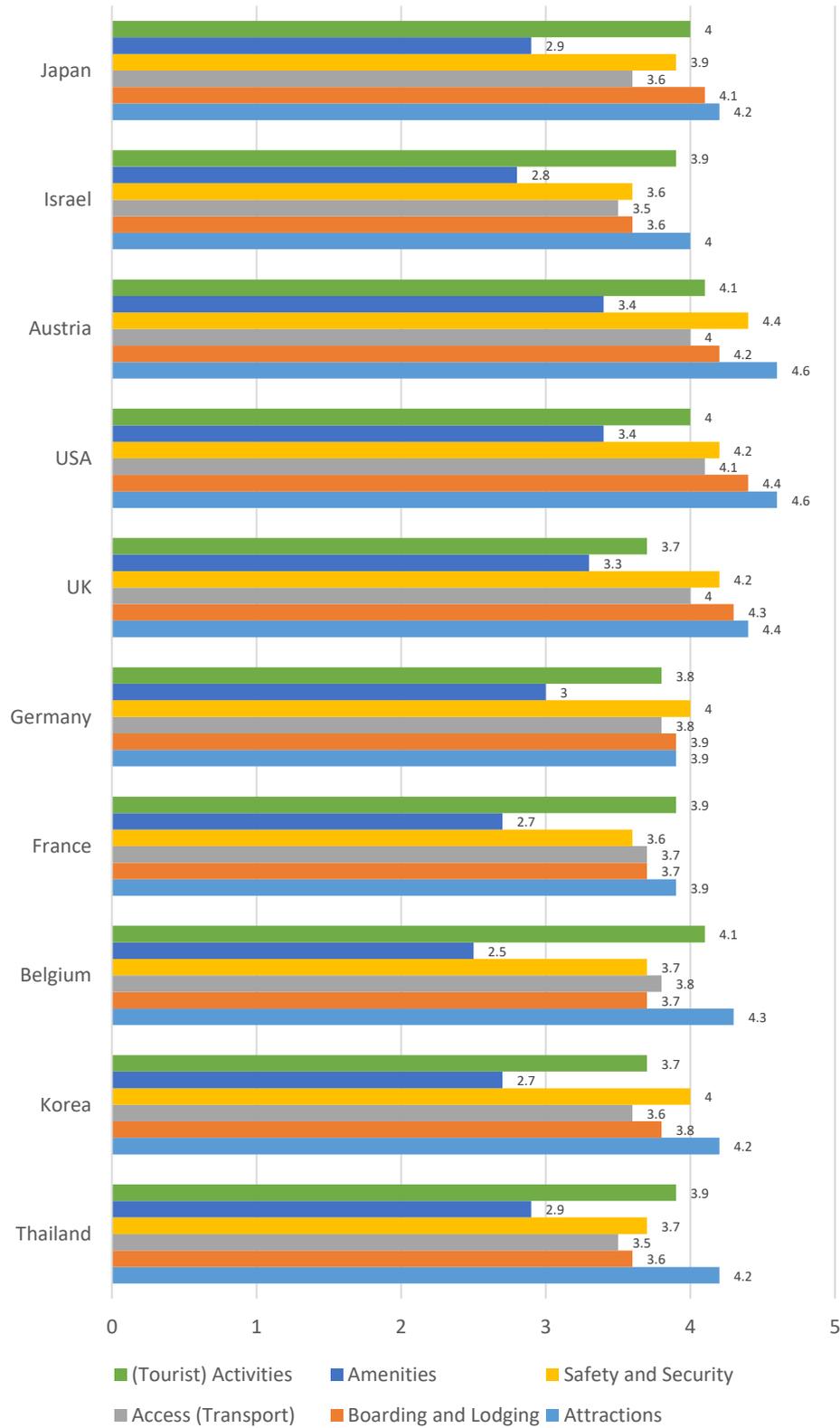


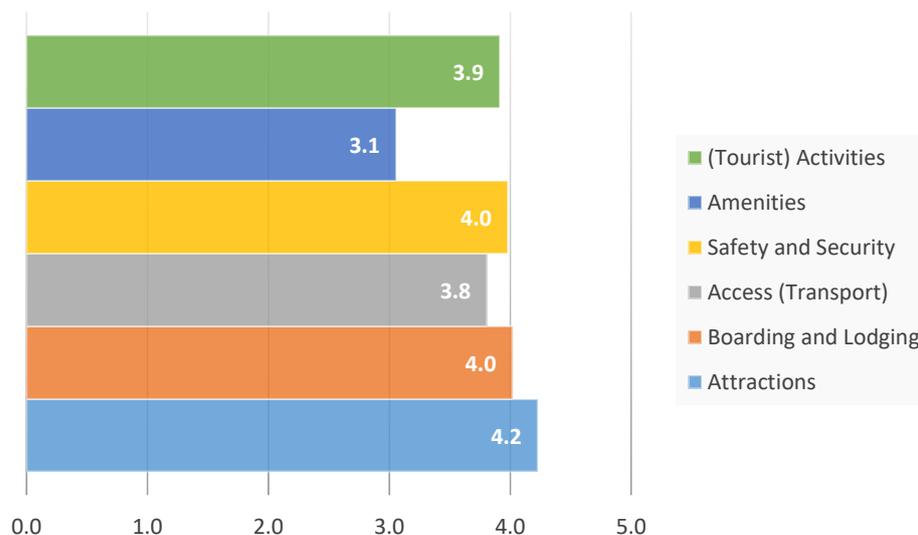
Table 4.8: Difference in visitor perception of top 10 visiting nationalities to Ladakh services vis-à-vis the six tourism dimensions

Attractions	Not Significant
Boarding and lodging	Not Significant
Access (transport)	Not Significant
Safety and security	Not Significant
Amenities	Not Significant
(Tourist) Activities	Significant

**Based on ANOVA for difference in average visitor perception of top 10 visiting nationalities to Ladakh services vis-à-vis the six tourism dimensions. Significant at 0.05(For details, see Table A4.8 in Annexure)*

Comparative performance of the six tourism service dimensions in Ladakh as perceived by the top ten visiting nationalities is as given below:

Figure 4.5: Comparative ratings of six tourism dimensions for top 10 visiting nationalities at Ladakh (Phase II of Survey)



Thus, while attractions and boarding & lodging are rated high, at both the destinations- Valley of Kashmir and Ladakh, access and amenities are rated low by the visitors' from top ten visiting nationalities.

5. Conclusions and suggestions

This section presents the findings and conclusions drawn from the study. A few suggestions are also offered. In the first part (sections 5.1 to 5.3), are conclusions drawn vis-à-vis the terms of reference made by the Ministry of Tourism, Government of India. The second part deals with the conclusions and suggestions made to the additional research issues raised particularly during the second phase of the study.

5.1 Duration of stay of foreign tourists in India/ South Asia

The study suggested that there are international visitors who are staying in India for long durations for a variety of reasons. A part of their stay in India is spent in holidaying and on this occasion, they were in Valley of Kashmir or Ladakh. Their whole stay in India is not spent in leisure. Accordingly, it was decided to understand the holiday purchase for four groups. First are the short-staying visitors, those staying for less than 15 days in India; then are the moderate duration staying visitors who stay between 16 to 30 days; longer staying visitors who stay between 31 to 60 days; and, the very long-staying tourists who are in India for more than 61 days. It is the first two groups who are predominantly visiting the Valley of Kashmir and Ladakh for leisure trips. The study revealed that the average stay of these visitors in India is 11.9 days. An earlier study (Sen Gupta, 2012) around four years back puts this number at 10.65 days. The visitors, in this category, to Valley of Kashmir stay for around 10.94 days in India which is close to the all India average. The visitors, in this category to Ladakh stay for around 12.91 days. Thus, visitors to Ladakh stay around two days longer than the all India average. Further, Table 3.14 suggests, that visitors, especially those visiting for shorter duration and medium duration buy other destinations along with the trip to Valley of Kashmir and Ladakh in India. Their stay in India in these cases is less than 50% of the total duration with the exception of medium duration staying visitors to Ladakh.

5.2 Stay of foreign tourist in Ladakh and Valley of Kashmir

A very long staying visitor in India spends around 16.6 days in Valley of Kashmir, but they are also likely to visit Ladakh for around a week (7.4 days on average). However, the very long staying visitor to Ladakh spends around twice as much time (compared to

Valley of Kashmir) there- 38.3 days and just 3.2 days in Valley of Kashmir. Thus, the visitors to Ladakh are more focused.

In the case of long staying visitors, visitors to Valley of Kashmir spend 11.0 days there and 3.3 days in Ladakh; whereas, those visiting Ladakh spend around 25.4 days in Ladakh and only 1.2 days in the Valley of Kashmir.

For the moderate duration and short duration staying visitors, out of 10.94 days that they spend in India, they stay for around 5.5 days in Valley of Kashmir and 2.9 days in Ladakh. Those international tourists who visit Ladakh- out of 12.91 days that they spend in India, they spend around 9.6 days in Ladakh and less than a day (0.7 days) in Valley of Kashmir.

Thus, Ladakh is a more focused destination as compared to Valley of Kashmir on two counts. One, those visiting Valley of Kashmir are likely to spend some time in Ladakh also, whereas the vice versa may not be true. Those visiting Ladakh are not spending a significant time in Valley of Kashmir. Thus, the spending of the visitor travelling to Valley of Kashmir is partly spent in Ladakh, whereas the visitors to Ladakh tend to spend only there.

Two, the moderate duration and short duration staying visitors to Valley of Kashmir spend only 50% of their holiday time in India in the Valley. They are also spending around 26.5 % time in Ladakh. However, visitors to Ladakh spend 74.4% of their holiday time in India in Ladakh. They spend only 5% of time in Valley of Kashmir. One of the factors contributing to this longer stay in Ladakh is that tourists need to spend an extra day to acclimatise in the high altitudes of Ladakh. Some time is also spent in travelling to these destinations from the ports of disembarkation in India. Most moderate duration and short duration staying visitors to Ladakh and Valley of Kashmir arrive in Delhi.

Many nature loving adventurers travel to Ladakh by road. The two popular approach routes to Ladakh are through Srinagar- Kargil- Leh route and the Manali- Rohtang pass- Leh route. However, they consume more time.

5.3 Other places of interest in India/South Asia

The visitors to Valley of Kashmir spend only 50% of their time (stay) in India, in the Valley. Thus, they are likely to visit other destinations in India. The study considered four popular circuits in India- Agra, Rajasthan, Goa and Kerala. Two factors play an important role- the stay in India and the distance of the destination from the main destination of visit- in this case, the state of Jammu and Kashmir. Longer staying tourists are more likely to visit these destinations as compared to those who stay shorter. They are also more likely to visit Agra followed by Rajasthan, Goa and Kerala in that order. For international visitors to north India, which includes Ladakh and Valley of Kashmir, New Delhi is the main port of disembarkment. Agra is very well connected to New Delhi. So, while 66.7% of long staying tourists visit or intend to visit Agra, even 60% of shorter staying tourists are likely to visit Agra (Table 3.10).

The international visitors to Ladakh are more focused with around 74.4 % time spent in Ladakh. They are less likely to visit other places. But their preference for the chosen four destinations returns the same priority- Agra followed by Rajasthan, Goa and Kerala in that order.

However, besides these 4 destinations, New Delhi remains the most popular place for visitors both to Ladakh and Valley of Kashmir. Given the proximity, to the state of Jammu and Kashmir, Himachal Pradesh is the next most popular destination for the international visitors.

Nepal is the only place in South Asia where the international visitors to Ladakh and Valley of Kashmir are likely to visit during this holiday. Around 25% of the long staying visitors may travel to Nepal. The proportion of international travelers visiting any other destination is less than 10% (see table 3.13). Thailand is the most popular choice of destination outside of South Asia for the international visitors to both Ladakh and Valley of Kashmir. The proportion of such possible visits is quite less. Visitors to Ladakh are more likely to visit Southeast Asia and Japan in Far East, whereas, those visiting Valley of Kashmir are likely to travel to China in Far East, Singapore, UAE and Saudi Arabia.

5.4 Visitors profile

Both Ladakh and Valley of Kashmir are emerging as diversified destinations. Thus, there are distinct segments seeking different products at these two destinations. Top 5 source markets for India are USA, Bangladesh, UK, Sri Lanka and the Russian federation (Ministry of Tourism, Government of India, 2014). However, in case of Valley of Kashmir the top source markets are Malaysia, Thailand, UK, USA and France in that order, while for Ladakh the top markets are France, USA, Thailand, Japan and UK.

Further, table 3.2 suggests that these source markets change with the season (quarter). The purpose of visit also changes with the season. For example, in Valley of Kashmir, during the first quarter, i.e., April through June, visitors are seeking nature and culture. In the next quarter, from July to September, some visitors start seeking adventure activities. In the third quarter, from October to December, culture and adventure become the primary tourist motives; while, in the fourth quarter from January to March, adventure is the top product followed by nature. Thus, with change in seasons, the nature of product sought also changes. While visitors from UK and US are the main markets for the first three quarters, Russians come during the fourth quarter.

It is an altogether different set of visitors' markets in Ladakh. It is largely for culture and adventure in Ladakh with visits for nature figuring only in the fourth quarter. Visitors to Ladakh are mainly from Japan, Thailand, France, Israel, Belgium, etc. These are different from those coming to Valley of Kashmir and those coming to India in general. Even the nature of adventure offered at the two destinations is different. While the Valley of Kashmir is more popular for snow and related sports particularly during the fourth quarter of the study, that is, January through March; Ladakh is more popular for trekking, hiking, camping, biking etc. all through the year.

Thus, it can be concluded that either of the two destinations offer themselves to different segments during different seasons. A more in-depth study of select markets and their purchase baskets and behaviour is proposed. This will help identify the market and their needs. Identifying the markets will help the two destination, Valley of Kashmir and Ladakh, to prioritize their marketing efforts to these markets instead of indiscreetly reaching out to one and all; and thereby reducing the efficacy of their marketing efforts. On the other hand, the destinations should get ready for their priority markets first.

Understanding the behaviour of their priority markets can help these destinations focus better on the services for these markets- products, linguist guides and escorts, cuisine, and sensitization towards tourist purchase behaviour.

This has one more implication. The Government of Jammu and Kashmir, may like to consider marketing the different regions to different segments, instead of marketing the entire state as one product/destination.

5.5 Tourism services

The International travelers to Ladakh and Valley of Kashmir were most satisfied by the attractions at the two destinations followed by lodging and boarding facilities. They were least impressed by the amenities. However, there was no significant difference between these three at the two destinations. Though tourists were relatively less satisfied with tourist activities, safety and security and access (transport); these were considered significantly better at Ladakh as compared to Valley of Kashmir. Except for attractions and tourist activities, there was found to be a significant difference in other four dimensions of tourist services with change in season.

Owing to seasonality, the demand for tourism services vary across different seasons. The suppliers of these services tend to match the demand by varying their supply in terms of depth and range of services. Whereas in different quarters, different segments of tourists arrive at these destinations and given the depth and range of services, their satisfaction with them varies. The needs and expectations of the different segments are different. They seek different levels of services. Thus, targeting the right segment and organizing services according to their expectations is a challenge.

5.6 Purchase profile

One of the findings of this study is that 63.8% of the international visitors arriving in Ladakh and valley of Kashmir are independent travelers. The size of the package group is larger in case of Ladakh. The average size of group in Valley of Kashmir is 3.8, while that in Ladakh is 4.9. In case of Valley of Kashmir, those who traveled independently were significantly less satisfied with access (transport). For all other tourism service dimensions, the difference in satisfaction of those on a package tour and those

travelling independently was insignificant. In case of Ladakh, satisfaction of international visitors travelling independently is significantly higher for attractions, boarding and lodging, and access.

Thus, the destinations should ready themselves for more of independent travelers and must specially ensure improvement in access both to the destination and at the destination.

6. Notes and observations

The study was carried out in two phases. Based on the experience in the first phase, some changes were made for the second stage of the survey. Most importantly, the respondent feedback on perceived tourism services at the two destinations was obtained. During the first phase:

1. The instrument advised by the then Secretary (T) was used. It is attached as Annexure A.
2. Q1a asked about the 'total duration of present trip'. Q1 b asked about 'duration of stay in India'. Q1a was meant to be the duration of the present trip a part of which was Q1b. There are foreigners who are living in India for a long time and were on a short holiday/ trip to Srinagar or Leh. For them therefore Q1b was bigger than Q1a. Some others misconstrued the questions on the similar line.
3. Therefore, a new variable 'Present trip' was calculated. It was the minimum of Q1a and Q1b.
4. For some respondents, for example, the value of *Present Trip* was 10 days. Further, the total of their visits to Kashmir, Leh and Jammu was more than 10 (duration of present trip). This was considered an error. Thus, cases where "Valid = Present trip – Stay in Kashmir – Stay in Leh – Stay in Jammu" was a negative value, were dropped. There were 558 such cases. Effective sample size was 3069. Three respondents did not provide sufficient information for analyses. These were also removed from the data set. Further 51 respondents mentioned the duration of the trip as 0 days (perhaps because they were about to start the trip.) Thus, the effective data set is reduced to 3015.
5. Some of the respondents who were sampled had been staying long in the country. For them it was short holiday / trip to Srinagar or Leh. While others who had come primarily for this trip. It was therefore decided to divide the data set into very long duration stays (more than 61 days), long duration stays (31 to 60 days in India), mid duration stay (16 to 30 days in India) and short duration (less than 15 days' stay).

During the second phase of survey, a modified questionnaire was used (Annexure 2). The scope of study was widened to understand the consumption of tourism during different tourism seasons (the year was divided into four seasons based on expert

opinion). Study intended to evaluate the differences between the consumption at the two chosen destinations, if any.

1. It has been observed that tourists considered trekking as a part of nature visit.
2. Another observation is that under 'others' category for the purpose of visit, visitors have listed trekking as an activity undertaken by them. For the purpose of this research, trekking was considered as an adventure activity and not a part of the nature-based activity.
3. Respondents were asked for a forced single choice as the primary purpose of visit; however, discussion with those interviewed made it evident (also as discussed earlier) that other motivation had a role to play.

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Annexures

Annexure 1: Instrument used in Phase 1 of study

Leh/ Srinagar	No. _____
Questionnaire for Survey on International Travellers' Prioritisation of Ladakh/ Valley of Kashmir.	
<i>Thank you for visiting India. We would be grateful if you could help us serve you better by filling up this questionnaire in your own handwriting. This should take a few seconds</i>	
Name (optional)	_____
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female
Nationality	_____
1 Regarding this trip	
a. Total duration (in number of days) of your present trip	_____
b. Duration of stay in India (in number of days)	_____
c. Out of this, what is the duration of stay	
c1. In Kashmir valley (in number of days)	_____
c2. In Ladakh region (in number of days)	_____
c3. In Jammu province (in number of days)	_____
2 What other places in India did you visit/ plan to visit during you current trip?	
a. Agra	<input type="checkbox"/>
b. Rajasthan	<input type="checkbox"/>
c. Goa	<input type="checkbox"/>
d. Kerala	<input type="checkbox"/>
e. Other, please specify _____	
3. During your present trip, what other countries besides India did you visit/ plan to visit?	
a. Nepal	<input type="checkbox"/>
b. Bhutan	<input type="checkbox"/>
c. Sri Lanka	<input type="checkbox"/>
d. Bangladesh	<input type="checkbox"/>
e. Others, please specify _____	

Annexure 2: Instrument used in phase 2 of study

International Travellers' Prioritisation of Ladakh / Valley of Kashmir (A project of Ministry of Tourism, Government of India)					
Place: <input type="checkbox"/> Kashmir/ <input type="checkbox"/> Ladakh		Instrument No.: _____			
Month: _____		Fortnight: <input type="checkbox"/> I/ <input type="checkbox"/> II			
(To be filled by the surveyor)					
Name: _____					<i>(Optional)</i>
Gender: <input type="checkbox"/> Male/ <input type="checkbox"/> female		Nationality: _____			
For how many days during this trip you have visited or plan to stay in each of the following destinations?					
Out of India _____		India _____			
Kashmir _____		Ladakh _____		Jammu _____	
What countries other than India have you visited or plan to visit during this trip?					
<input type="checkbox"/> Nepal <input type="checkbox"/> Bhutan <input type="checkbox"/> Sri Lanka <input type="checkbox"/> Bangladesh <input type="checkbox"/> Others _____ (Pl. specify)					
Which cities in India (outside J&K) have you visited or plan to visit?					
1. _____ 2. _____ 3. _____					
Have you taken a package tour? <input type="checkbox"/> Yes/ <input type="checkbox"/> No					
How many people are travelling with you? _____					
What is the main purpose of your travel on this trip?					
<input type="checkbox"/> Nature <input type="checkbox"/> Adventure <input type="checkbox"/> Culture <input type="checkbox"/> Spiritual <input type="checkbox"/> Others _____ (Pl. specify)					
Please rate your experience on the following during this trip:					
<i>Tourist attractions</i>	Very bad	Bad	OK	good	Very good
<i>Boarding and lodging</i>	Very bad	Bad	OK	good	Very good
<i>Access and transport</i>	Very bad	Bad	OK	good	Very good
<i>Safety and security</i>	Very bad	Bad	OK	good	Very good
<i>Amenities (ATMs, internet, etc.)</i>	Very bad	Bad	OK	good	Very good
<i>Touristic activities (including boat rides, shopping, etc.)</i>	Very bad	Bad	OK	good	Very good
A survey by Indian Institute of Tourism and Travel Management					

Annexure 3: Select tables detailing statistical analysis

Table A4.1: Independent sample t-Test for different tourist services for the two destinations

	t	df	Sig. (2-tailed)	Mean Difference	Std. Error
Attractions	.061	1314	.951	.0026	.0429
Boarding and lodging	-1.137	1313	.256	-.0526	.0463
Access (transport)	-6.484	1314	.000*	-.3203	.0494
Safety and security	-2.420	1311	.016*	-.1127	.0466
Amenities	.777	1297	.437	.0418	.0537
(Tourist) Activities	-2.909	1296	.004*	-.1323	.0455

** Significant at 0.05*

Table A4.2: ANOVA for difference in Mean visitor perception of services in four quarters

		<i>Sum of Squares</i>	<i>df</i>	<i>Mean Square</i>	<i>F</i>	<i>Sig.</i>
Attractions	<i>Between Groups</i>	1.661	3	.554	.913	.434
	<i>Within Groups</i>	795.254	1312	.606		
	<i>Total</i>	796.915	1315			
Boarding and lodging	<i>Between Groups</i>	6.490	3	2.163	3.084	.026*
	<i>Within Groups</i>	919.568	1311	.701		
	<i>Total</i>	926.058	1314			
Access (transport)	<i>Between Groups</i>	14.579	3	4.860	5.937	.001*
	<i>Within Groups</i>	1073.950	1312	.819		
	<i>Total</i>	1088.529	1315			
Safety and security	<i>Between Groups</i>	7.905	3	2.635	3.711	.011*
	<i>Within Groups</i>	929.521	1309	.710		
	<i>Total</i>	937.426	1312			
Amenities	<i>Between Groups</i>	22.888	3	7.629	8.275	.000*
	<i>Within Groups</i>	1193.950	1295	.922		
	<i>Total</i>	1216.838	1298			
(Tourist) Activities	<i>Between Groups</i>	40.514	3	13.505	20.910	.000
	<i>Within Groups</i>	835.740	1294	.646		
	<i>Total</i>	876.253	1297			

* Significant at 0.05

Table A4.4: Independent sample t-Test for different tourist services for those with package and those without it at the two destinations

	<i>Valley of Kashmir</i>			<i>Ladakh</i>		
	<i>t</i>	<i>df</i>	<i>Sig. (2-tailed)</i>	<i>t</i>	<i>df</i>	<i>Sig. (2-tailed)</i>
Attractions	1.675	649	.094	2.745	639	.006*
Boarding and lodging	1.694	650	.091	2.736	637	.006*
Access (transport)	1.989	650	.047*	2.678	638	.008*
Safety and security	0.603	650	.547	1.164	636	.245
Amenities	-0.050	649	.960	0.090	622	.928
(Tourist) Activities	0.206	650	.837	-1.102	610	.271

* Significant at 0.05

Table A4.5: Mean score of ratings on six tourism dimensions for top 10 visiting nationalities at Valley of Kashmir (Phase II of Survey)

	Nationality	Attractions	Boarding and Lodging	Access (Transport)	Safety and Security	Amenities	(Tourist) Activities
1	Thailand	4.4	4.0	3.4	3.6	2.9	3.7
2	Australia	4.3	3.8	3.6	4.1	3.1	3.8
3	Malaysia	4.6	4.3	3.8	4.1	3.1	3.8
4	France	4.2	3.9	3.4	3.9	3.0	3.6
5	Germany	4.3	4.0	3.5	3.9	3.1	3.9
6	Canada	4.3	4.2	3.9	3.7	3.2	3.8
7	UK	4.2	4.0	3.4	3.9	3.1	3.7
8	USA	4.2	4.0	3.5	3.9	3.2	3.9
9	China	4.0	3.7	2.9	3.6	2.6	4.0
10	Russia	4.2	3.7	3.4	3.7	2.9	3.4
	Mean	4.3	3.9	3.4	3.8	3.0	3.8

Table A4.6: ANOVA for difference in mean visitor perception of services of top 10 visiting nationalities to Valley of Kashmir vis-à-vis the six tourism dimensions

		<i>Sum of Squares</i>	<i>df</i>	<i>Mean Square</i>	<i>F</i>	<i>Sig.</i>
Attractions	<i>Between Groups</i>	6.031	9	.670	1.169	.313
	<i>Within Groups</i>	241.886	422	.573		
	<i>Total</i>	247.917	431			
Boarding and lodging	<i>Between Groups</i>	11.634	9	1.293	2.013	.037*
	<i>Within Groups</i>	271.618	423	.642		
	<i>Total</i>	283.252	432			
Access (transport)	<i>Between Groups</i>	19.140	9	2.127	2.444	.010*
	<i>Within Groups</i>	368.140	423	.870		
	<i>Total</i>	387.279	432			
Safety and security	<i>Between Groups</i>	10.430	9	1.159	1.856	.057
	<i>Within Groups</i>	264.110	423	.624		
	<i>Total</i>	274.540	432			
Amenities	<i>Between Groups</i>	9.196	9	1.022	1.300	.234
	<i>Within Groups</i>	331.617	422	.786		
	<i>Total</i>	340.813	431			
(Tourist) Activities	<i>Between Groups</i>	9.365	9	1.041	1.486	.150
	<i>Within Groups</i>	296.146	423	.700		
	<i>Total</i>	305.510	432			

*Significant at 0.05

Table A4.8: ANOVA for difference in Mean visitor perception of services of top 10 visiting nationalities to Ladakh vis-à-vis the six tourism dimensions

		<i>Sum of Squares</i>	<i>df</i>	<i>Mean Square</i>	<i>F</i>	<i>Sig.</i>
Attractions	<i>Between Groups</i>	20.798	9	2.311	3.691	.000*
	<i>Within Groups</i>	264.181	422	.626		
	<i>Total</i>	284.979	431			
Boarding and lodging	<i>Between Groups</i>	30.951	9	3.439	5.153	.000*
	<i>Within Groups</i>	280.960	421	.667		
	<i>Total</i>	311.912	430			
Access (transport)	<i>Between Groups</i>	18.682	9	2.076	2.972	.002*
	<i>Within Groups</i>	294.097	421	.699		
	<i>Total</i>	312.780	430			
Safety and security	<i>Between Groups</i>	25.383	9	2.820	3.898	.000*
	<i>Within Groups</i>	302.418	418	.723		
	<i>Total</i>	327.801	427			
Amenities	<i>Between Groups</i>	31.710	9	3.523	3.483	.000*
	<i>Within Groups</i>	417.827	413	1.012		
	<i>Total</i>	449.537	422			
(Tourist) Activities	<i>Between Groups</i>	7.172	9	.797	1.292	.239
	<i>Within Groups</i>	248.513	403	.617		
	<i>Total</i>	255.685	412			

*Significant at 0.05

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