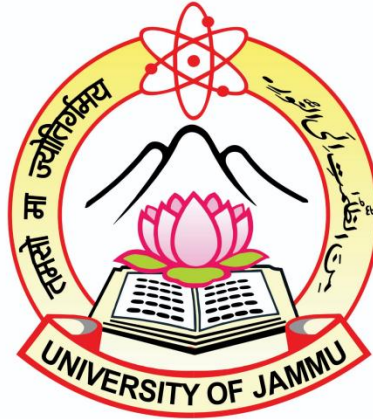


"Impact of Improved Train Connectivity To Katra on Jammu Tourism
Stakeholder's : Analysing the Impact"



MAJOR RESEARCH PROJECT
SEMESTER 1
FOUR-YEAR UNDERGRADUATE PROGRAM
(DESIGN YOUR DEGREE)
SUBMITTED TO
UNIVERSITY OF JAMMU, JAMMU

SUBMITTED BY THE GROUP: **VIRASAT**

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SUBMITTED _____ FEB, 2024

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We acknowledge all the people, mentioned or not mentioned here, who have silently wished and gave fruitful suggestions and helped us in achieving the present goal.

CERTIFICATE

The report titled "**Impact of Improved Train Connectivity to Katra on Jammu Tourism Stakeholders: Analysing the Impact**" has been done by Group Virasat including group members- (Narayan Choudhary, Bhoomi Samnotra, Manjot Singh, Suhani Behl, Radhey Sharma and Mohd.Sajid). This project served as a significant undertaking for Semester I of their academic program. Under the supervision and guidance of (Dr. Anil Gupta, Dr. Shallu Sehgal) of the Design Your Degree, Four Year Undergraduate Programme at the University of Jammu, Jammu and Kashmir. This project report is original and has not been submitted elsewhere for any academic recognition.

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Abstract

This Research Project aims to analyse the impact of improved train connectivity to Katra on tourism stakeholders in Jammu. Different types of tourism businesses including hotels, restaurants, tour operators, and taxi services that cater to pilgrimage tourists as well as leisure and business travellers were surveyed. The objective is to understand how the direct train route to Katra has affected tourist arrivals and spending patterns so far, and what further impact stakeholders anticipate from the upcoming direct Kashmir rail link. Key areas explored will be changes observed in customer volume and demographics, impacts on business revenue and sustainability, adaptations made to business models, collaborations formed, challenges faced, and support needed from tourism authorities. Stakeholder perspectives are gathered on the long-term implications for Jammu tourism in terms of market growth, competition, changes to tourist behaviour, and cultural/environmental impact. Additionally, the Research Project assesses business strategies and confidence in adapting to the changing tourism landscape. This includes gauging interest in expanding tour products to Kashmir, confidence in future business prospects, and opinions on marketing to non-pilgrimage segments. The outlook of stakeholders will reveal whether they expect diversification or potential decline for Jammu tourism amidst improved connectivity to Kashmir. In summary, the Research Project aims to develop a 360-degree view of stakeholder perceptions on the current and future impacts of rail connectivity changes on Jammu's tourism industry. The findings will aid tourism planning and policy making to ensure balanced and sustainable growth. The research results will help guide evidence-based policies and collaborative action by government and industry leaders to leverage tourism growth opportunities for Jammu region.

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Chapter 1

Introduction

1.1 Brief History of Jammu City

Location and Historical Significance: Strategically located within the foothills of the Himalayas, Jammu sits on the banks of the Tawi River, surrounded by mountains to the north and plains to the south. As the largest city and winter capital of the Jammu and Kashmir territory, it has long served as an important political and commercial centre since ancient times. Jammu's 240 sq. km area comprises the second most populous urban area in the region after Srinagar. Its status as a capital city consolidated under 19th-century Dogra rule, when Jammu emerged as a prominent hub. Its location and resources led various conquering forces like the Mughals and Sikhs to also establish control over Jammu through the centuries.[1]

Tourism and Cultural Heritage: The rich history of tourism in Jammu City can be traced back to ancient times when it served as a significant hub for trade, pilgrimage, and cultural exchange. Situated strategically at the crossroads of various trade routes, Jammu City has attracted travellers and traders from different parts of the Indian subcontinent and beyond. The majestic palaces and forts built such as the Mubarak Mandi Palace and Bahu Fort, not only served as administrative centres but also became prominent tourist attractions, showcasing the architectural grandeur and cultural heritage of the region. Moreover, Jammu City's proximity to revered religious sites, including the Vaishno Devi Shrine, has long made it a focal point for pilgrims undertaking spiritual journeys.[2][3]

Transportation Hub and Modern Development: With the advent of modern transportation infrastructure, such as railways and roadways, Jammu City emerged as a crucial transportation hub, connecting various regions of northern India to the Kashmir Valley and beyond. Its status as the second-last railway terminal in North India further enhanced its accessibility and prominence as a tourist gateway. **Diverse Attractions and Sustainable Tourism:** Over the years, Jammu City has continued to evolve as a dynamic tourism destination, offering a diverse array of attractions ranging from historic landmarks like the Raghunath Temple and Amar Mahal to picturesque parks and gardens like Rani Park and Peer Meetha. The blend of cultural heritage, religious significance, and natural beauty makes Jammu City an alluring destination for travellers seeking enriching experiences.[4][5][7]

As tourism in Jammu City continues to flourish, efforts have been made to preserve and promote its cultural and historical treasures while also embracing sustainable tourism practices. The city's tourism sector remains a vital contributor to its economy, fostering socio-economic development and cross-cultural exchanges while preserving its unique identity and heritage for generations to come. **Cultural and Historical Significance of Jammu Tawi Railway Station:** The Jammu Tawi railway station is a key transportation hub in the city of Jammu, located in the northern Indian state of Jammu and Kashmir. It holds cultural and historical

significance for the people of Jammu and Kashmir, having witnessed the passage of countless travellers, including pilgrims visiting the region's sacred sites and tourists exploring its scenic landscape.[7]

1.2 Railway Connectivity in Jammu and Kashmir: A Historic Journey

Historical Development of Railways in the Jammu Region: The rail line in the Jammu area traces its origins back to the North Western Railway from Sialkot District to Jammu municipality. Construction commenced in October 1888, and the 17-mile line became operational on March 13, 1890. However, the partition of India in 1947 disrupted this linkage.**Pre-Partition Rail Plans and Constraints:** In 1902, surveys were conducted under Maharaja Pratap Singh for rail connections via three potential paths. These included Abbottabad to Srinagar, Jammu to Srinagar through Banihal for a Narrow-Gauge rail, and Jammu to Srinagar via Banihal for an electric rail. Despite these plans, construction did not commence due to budget constraints and awaiting consent from the Administration of India. There were potential financial resources from coal reserves found in the Ladda region, which could have been utilized to fund the rail projects. However, after the plans were scrapped, the reason for not utilizing these coal supplies remains unspecified.[8]

Post-Partition Rail Development: After the partition in 1947, efforts to link Jammu with India recommenced. A strategic rail line connecting the Jalandhar branch line to Pathankot was commissioned, with construction starting in November 1949. This 44 km track became operational by April 7, 1952. Subsequently, the rail line extended from Pathankot to Madhapur and later to Kathua in 1966, marking a significant milestone despite being only 6 km inside the state.**Expansion and Completion of Rail Projects:** In 1969, plans were made to extend the rail line from Kathua to Jammu. This challenging project was completed in just three years, with goods service commencing in October 1972 and traveller service in December 1972, inaugurated by Minister T.A. Pai. Notable dignitaries present at the inauguration included Central Minister Dr. Karan Singh, Om Mehta, state ministers, and rail officials, with messages from the President, Prime Minister, and Governor highlighting the event. The Srinagar Express, now Jhelum Express, marked the first train to arrive at Jammu station on December 2, 1972, after a 25-year hiatus.[9]

Continued Rail Development and Challenges: Despite the challenges, work continued to connect the Kashmir Valley via the challenging Himalayan terrain, involving the construction of long tunnels and tall bridges. Phased openings facilitated rail access from Banihal to Baramulla, with specialized vehicles transporting coaches across regions. Prime Minister Modi inaugurated the Udhampur-Katra line in 2014, enabling pilgrims to access the Vaishno Devi shrine. Further extensions aim to connect Kanyakumari to Kashmir by mid-2019, promising further integration and development for Jammu and Kashmir through the power of railways.[10]

1.3 Recent Developments in Jammu and Kashmir Railways

The Udhampur-Srinagar-Baramulla Rail Link Project (USBRL Project) The USBRL Project stands as a monumental endeavour aimed at bolstering connectivity and spurring socio-economic growth in the northernmost alpine region of India, Jammu & Kashmir (J&K). Covering a vast expanse of 272 kilometres, this project endeavours to forge a crucial railway connection linking the picturesque Kashmir Valley with the Jammu Railway Station and the broader Indian rail network. Designated as a National Project, the USBRL Project has harnessed expertise from prestigious institutions such as IIT Delhi, IIT Roorkee, the Geological Survey of India, and DRDO, underscoring its strategic significance in the face of the region's challenging topography and geographical constraints.[10][11]

Key Features and Engineering Marvels: Noteworthy features of the USBRL Project include the construction of the Chenab Bridge, a remarkable engineering marvel poised at a towering height of 331 meters above the riverbed, epitomizing human ingenuity and resilience. This project is poised to revolutionize transportation dynamics in the region, offering an all-weather, convenient, and cost-effective mass transportation system while catalysing socio-economic development, industrial growth, and the seamless movement of goods and resources in and out of J&K.

The Jammu-Katra Railway Line: Concurrently, the Jammu-Katra Railway line emerges as another pivotal railway development initiative, serving as a lifeline connecting the bustling city of Jammu with Katra, a serene town nestled amidst the Trikuta Mountains, home to the revered Vaishno Devi Shrine. The establishment of the Jammu-Katra Railway line has been instrumental in facilitating pilgrimage tourism to the sacred Vaishno Devi Shrine, providing devotees with a hassle-free and efficient mode of transportation. Moreover, it has fuelled economic activity in the region, particularly in Katra, which has burgeoned into a significant transportation hub and gateway to the Vaishno Devi Shrine.

Promotion of Tourism and Economic Growth: Beyond its role in pilgrimage tourism, the Jammu-Katra Railway line has emerged as a beacon for promoting tourism beyond religious realms, offering passengers scenic vistas of majestic mountains and verdant valleys as it traverses through picturesque landscapes.[11]

Conclusion: In summation, the USBRL Project and the Jammu-Katra Railway line represent pioneering strides in augmenting transportation infrastructure in J&K, symbolizing a steadfast commitment to enhancing rail connectivity, fostering economic prosperity, and unlocking the region's immense potential for socio-economic development and tourism promotion

(1.4) Jammu-Katra Railway Line

The inauguration of the Jammu-Katra railway line in 2014 by Prime Minister Narendra Modi marked a significant achievement in connecting pilgrims to the revered Vaishno Devi Shrine in Katra, Jammu and Kashmir. This 54-kilometer track traverses picturesque valleys and challenging terrains, transforming the pilgrimage experience and boosting tourism in the region.[11]

Transformation of Pilgrimage Experience: Prior to the railway line, pilgrims relied on buses or taxis, enduring long road journeys and traffic congestion. The introduction of train services offers a comfortable, convenient, and time-saving alternative, reducing travel time from 7-8 hours to approximately 2 hours. Dedicated pilgrim trains like the "Shri Shakti Express" provide budget-friendly and hassle-free travel options, catering to lakhs of pilgrims annually, especially during peak seasons like Navratras.[11]

Part of Larger Vision for Tourism Development: the Jammu-Katra line is part of a larger vision to connect the Kashmir Valley through the Udhampur-Srinagar-Baramulla Rail Link, further boosting tourism and development in the region. However, the project faced several challenges during construction, including environmental concerns and land acquisition issues, highlighting the complexities of infrastructure development in sensitive areas.

Impact on Jammu City: While the Jammu-Katra railway line has revolutionized pilgrimage and tourism in the region, its impact on Jammu city presents a more nuanced picture. While it has brought economic benefits, it also carries the potential for unintended consequences for businesses within the city.

Shift in Tourism Hub and Competition: One major concern is the potential shift in the tourism hub. With Katra now easily accessible, tourists may bypass Jammu city altogether, opting to spend their entire trip in the vicinity of the Vaishno Devi Shrine. This could lead to a loss of revenue and potentially jeopardize the livelihood of businesses in Jammu, including hotels, restaurants, and other tourism-related establishments.

Furthermore, the line creates competition between businesses in Jammu and Katra. Tourists now have a wider range of options for accommodation, dining, and other services, potentially favoring Katra-based businesses due to their proximity to the shrine. This could result in an uneven distribution of tourist spending, disadvantaging businesses in Jammu city.

While the Jammu-Katra railway line has undoubtedly brought positive changes to pilgrimage and tourism, it also poses challenges for businesses in Jammu city. Effective strategies and collaborative efforts between stakeholders are necessary to mitigate these challenges and ensure sustainable development and prosperity for all parties involved.

Chapter 2

2.1 Formulation of Problem Statement

Introduction of enhanced train connectivity to Katra has significantly altered the tourism landscape of Jammu, presenting both opportunities and challenges for stakeholders in the region. However, there is a need to comprehensively understand the impact of this connectivity on Jammu's tourism sector to inform strategic decision-making and policy formulation.

The problem of comprehensively understanding the impact of enhanced train connectivity to Katra on Jammu's tourism sector was identified through a process of stakeholder engagement and observation. During initial discussions with stakeholders as part of the "Explore Your Surroundings" project, there is considerable emphasis on the introduction of train connectivity to Katra and its potential effects on tourism in the region. However, it became apparent that there is a lack of concrete data or comprehensive analysis regarding the actual impact of this connectivity. So, with a systematic approach mentees decided to work on this problem statement

2.2 Objectives of Research Project

- To gather perceptions and insights from Jammu's tourism stakeholders regarding the impact of improved train connectivity to Katra.
- To uncover challenges faced by enhanced train connectivity for Jammu's tourism stakeholders.
- To delve into stakeholders' strategies and adaptations to navigate the evolving tourism scenario, focusing on qualitative descriptions of adjustments made.
- To assess collaborative efforts among stakeholders to address challenges and capitalize on opportunities, emphasizing qualitative insights.
- To understand the support requirements from authorities such as the Jammu Tourism Development Corporation etc authorities, emphasizing qualitative responses and suggestions.
- To explore stakeholders' perceptions of the long-term effects of improved train connectivity on Jammu's tourism, emphasizing qualitative insights and potential shifts.
- To evaluate stakeholders' qualitative outlook and confidence regarding the future of their businesses and Jammu's tourism, focusing on nuanced perceptions and expectations.

2.3 Scope of Study

This study is dedicated to comprehensively understand the impact of enhanced train connectivity to Katra on the tourism landscape of Jammu. It delves into the perceptions and insights of Jammu's tourism stakeholders, encompassing various dimensions of the evolving tourism sector. Through a qualitative lens, the study explores nuanced changes in tourist arrivals, business dynamics, and overall tourism trends in Jammu. Additionally, it aims to identify the challenges faced and opportunities created by improved train connectivity, shedding light on shifts in customer base, competitive dynamics, and operational requirements. Furthermore, the study explores stakeholders' adaptation strategies, collaboration efforts, and support needs, emphasizing qualitative responses to provide a detailed understanding of the situation. By examining long-term implications and assessing stakeholders' future outlook, the study aims to offer valuable insights into the trajectory of Jammu's tourism sector amidst the backdrop of improved train connectivity.

Chapter 3

3.1 Methodology

- **Formulation of project objectives and problem statements:** Goals and identified key issues related to the impact of improved train connectivity to Katra on Jammu tourism stakeholders.
- **Identification of the survey area:** We narrowed down the survey area to focus specifically on Jammu tourism stakeholders affected by the improved train connectivity to Katra.
- **Determination of sample size:** After through discussions and consultation with mentors a sample size of 50 was selected to capture the diversity of tourism businesses and stakeholders in Jammu.
- **Framing of the questionnaire:** Mentees created a structured questionnaire aligned to the identified objectives and problem statements. We organized it into sections to address different aspects of the impact.
- **Conduction of Pilot study:** Pilot study was conducted to evaluate the effectiveness and clarity in capturing relevant data from respondents.
- **Collection of data:** Mentees gathered responses from diverse Jammu tourism stakeholders, ensuring coverage of different perspectives.
- **Tabulation and analysis of data:** Simple research tools like average method is used to quantify perception based data and identify response trends and patterns.
- **Preparation of the report:** A detailed report was prepared to present key survey findings, insights, and suggestions to address the impact on Jammu tourism stakeholders.

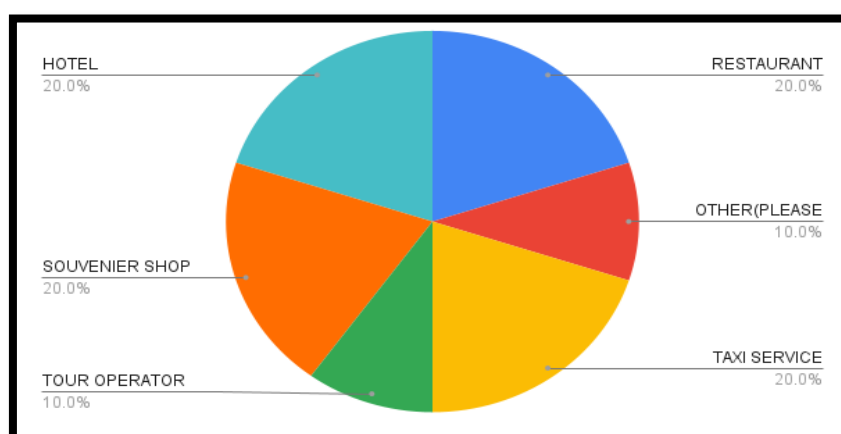
Chapter 4

4) Project Inferences and Discussions

The survey conducted aimed to assess the impact of improved train connectivity to Katra on various tourism stakeholders in Jammu. Responses were gathered from **50** number of stakeholders operating hotels, restaurants, tour operators, souvenir shops, and other tourism-related businesses in the region. The findings provide critical insights into how the improved railway connectivity to Katra has influenced tourist patterns, business operations, challenges faced, and the overall tourism landscape.

4.1 Business Profile

4.1.1) Different Segments of Stakeholder's

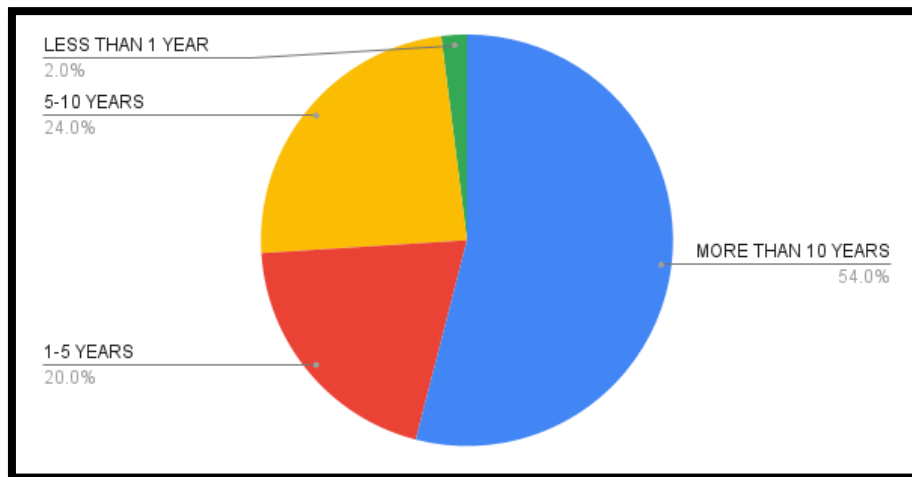


Key Insights of Business Profile

- **Hotels:** 20 per cent of respondents represented hotels, indicating the involvement of accommodation providers in the survey. Hotels play a crucial role in accommodating tourists and are integral to the tourism infrastructure in Jammu.
- **Restaurants:** Similarly, 20 per cent of respondents were from the restaurant sector, highlighting the participation of dining establishments in the survey. Restaurants contribute to the overall tourism experience by providing food and beverage services to visitors.
- **Taxi Services:** Another 20 per cent of respondents were from the taxi service sector, indicating the involvement of transportation providers in the survey. Taxi services are essential for facilitating tourists' mobility within and around Jammu.
- **Souvenir Shops:** 20 per cent of respondents represented souvenir shops, suggesting the participation of retail businesses catering to tourists' shopping needs. Souvenir shops offer visitors the opportunity to purchase memorabilia and local handicrafts, contributing to the tourism economy.

- **Tour Operators:** 10 per cent of respondents were tour operators, showcasing the involvement of businesses specializing in organizing and facilitating tours in the region. Tour operators play a vital role in promoting and showcasing Jammu's attractions to tourists.
- **Others:** The remaining 10 per cent of respondents were categorized as "Others," indicating the participation of businesses not specifically categorized in the survey options. This category may include additional tourism-related businesses such as travel agencies, adventure tour operators, or cultural attractions.

4.1.2) How Many Years in Operation

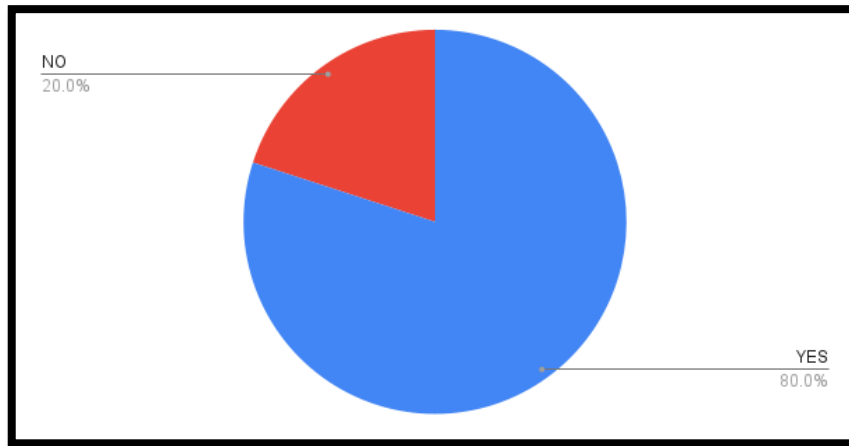


Key Insights of Responses Reported

- **Over 10 Years:** The majority 54 per cent of respondents have been operating in Jammu tourism for over 10 years. This indicates a significant level of experience and longevity in the industry, with these stakeholders likely having a deep understanding of the local tourism landscape and market dynamics.
- **Between 5-10 Years:** 24 per cent of respondents have been operating for a duration ranging between 5-10 years. This group represents a substantial portion of respondents who have accumulated a considerable amount of experience in Jammu tourism over the years.
- **Between 1-5 Years:** The remaining 20 per cent of respondents have been operating for a duration ranging between 1-5 years. While relatively newer to the industry compared to the first two groups, this segment still contributes valuable insights from their experiences and perspectives.
- **Less than 1 Year:** A small percentage 2 per cent of respondents reported operating for less than 1 year, indicating a minimal presence in the Jammu tourism market. Despite respondents may offer fresh perspectives and insights based on their recent entry into the industry.

4.2 Perceived Impact of Train Connectivity

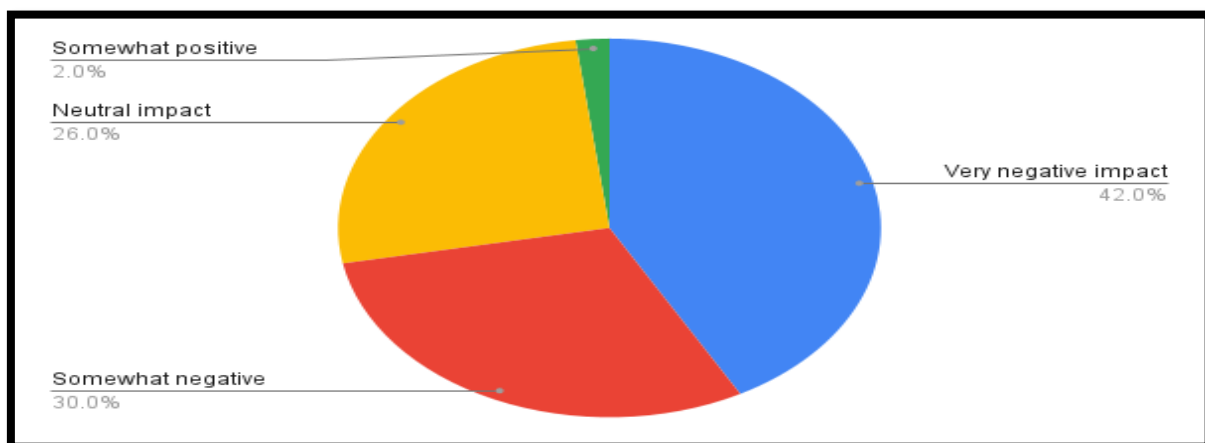
4.2.1) Observed changes in tourist numbers:



Key Insights of Responses Reported

- Observation of Changes: A majority of respondents 80 per cent reported observing changes in tourist numbers visiting Jammu in recent years. This indicates that the introduction of improved train connectivity has had an effect on the tourism landscape in Jammu.
- No Observation of Changes: A minority of respondents 20 per cent reported not observing any changes in tourist numbers. This suggests that, despite the implementation of Katra train connectivity, some stakeholders did not perceived any impact on tourist inflow to Jammu.

4.2.2) Impact of Katra train on Stakeholders

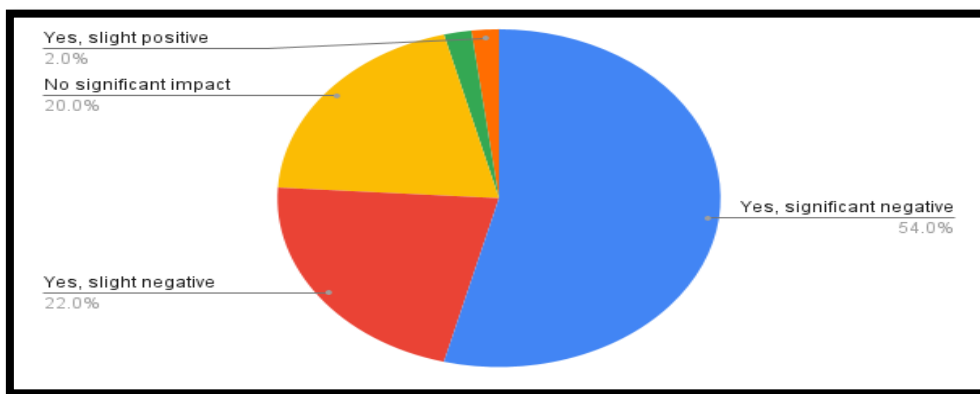


Key Insights of Responses Reported

According to the survey data, the perceived impact of the Katra train connectivity on Jammu stakeholders varies among respondents:

- **Positive Impact:** Only 2 per cent of respondents reported experiencing very positive or somewhat positive impacts on their operations due to the Katra train connectivity. This suggests a limited positive effect on a minority of stakeholders.
- **Neutral or Mixed Effect:** A significant portion 26 per cent of respondents indicated a neutral or mixed effect from the Katra train connectivity. This indicates a lack of substantial positive or negative impact on a considerable portion of stakeholders.
- **Negative Impact:** The majority 72 per cent of respondents reported experiencing negative effects from the Katra train connectivity, primarily due to reduced tourist footfall. Among these, 42 per cent experienced a negative impact, while 30 per cent reported a somewhat negative impact on their operations.

4.2.3) Future Kashmir connectivity impact:

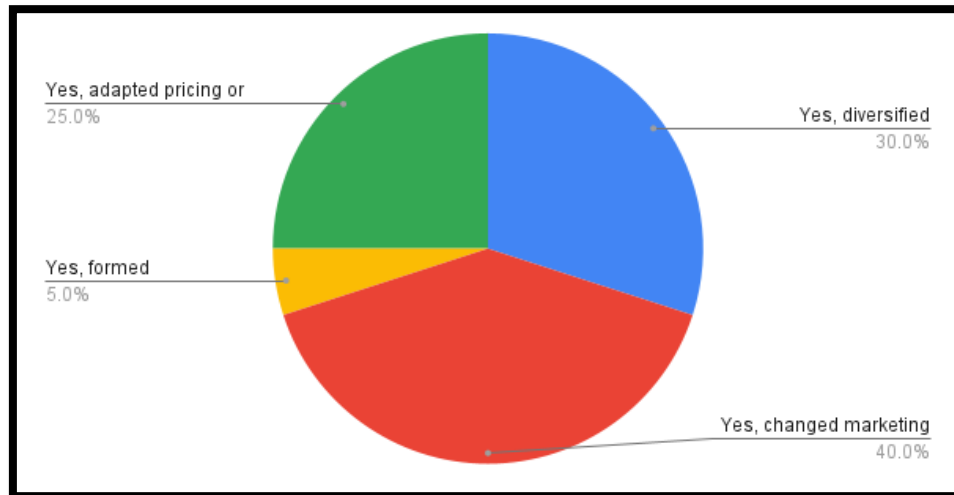


Key Insights of Responses Reported

- **Slight Positive Opportunities:** A small percentage 2 per cent of respondents foresee slight positive opportunities for Jammu once direct trains to Kashmir start operating. These respondents likely anticipate potential benefits or new avenues for tourism development that may arise from the enhanced connectivity.
- **Significant Negative Consequences:** The majority 54 per cent of respondents anticipate significant negative consequences for Jammu if tourist flow gets increasingly diverted due to the direct train connectivity to Kashmir. This indicates concerns among stakeholders regarding potential adverse effects on Jammu's tourism industry, such as reduced visitor numbers or economic impacts.
- **No Significant Impact:** 20 per cent of respondents believe that there will be no significant impact on Jammu once direct trains to Kashmir begin operating. This suggests a neutral stance or uncertainty regarding the potential consequences of the expanded train connectivity on Jammu's tourism sector.
- **Slight Negative Impact:** 22 per cent of respondents anticipate a slight negative impact on Jammu as a result of the diverted tourist flow towards Kashmir. While not as severe as the significant negative consequences foreseen by the majority.

4.3 Business Adaptations

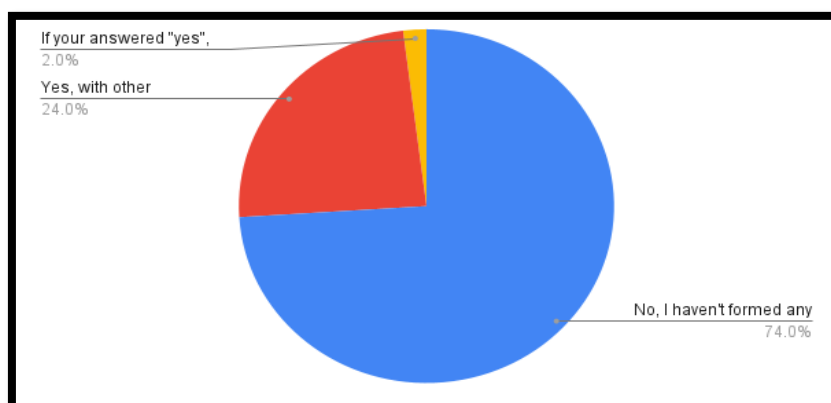
4.3.1) Changes to business model



Key Insights of Responses Reported

- Changes to Marketing Strategies: 40 per cent of respondents have implemented changes to their marketing strategies to align with shifting tourism patterns. This indicates a proactive approach to attract and engage with evolving visitor segments through tailored marketing efforts.
- Diversification of Product/Service Portfolio: 30 per cent of respondents have actively diversified their product/service portfolio beyond pilgrimage offerings. This suggests a strategic expansion of offerings to cater to diverse visitor interests and preferences beyond traditional pilgrimage tourism.
- Creation of Specialized Packages or Partnerships: A small percentage 5 per cent of respondents have created specialized packages or partnerships to target fresh visitor segments. This innovative approach aims to attract new visitor demographics or niche markets by offering unique and tailored experiences.
- Adaptation of Pricing and Packages: 25 per cent of respondents have adapted pricing and packages to remain competitive in light of changing tourism patterns. This flexible approach to pricing and packaging enables stakeholders to adjust accordingly to the scenario of market.

4.3.2) Partnerships formed:

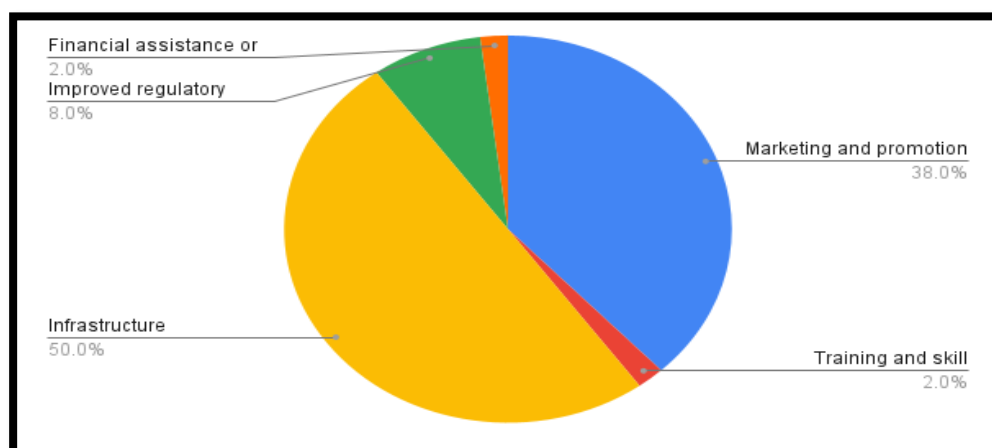


Key Insights of Responses Reported

- **Formed Partnerships with Other Tourism Stakeholders:** 24 per cent of participants have formed partnerships with other tourism stakeholders to enhance competitiveness. This indicates a proactive approach by a significant portion of respondents to leverage synergies and collective strengths in the tourism industry.
- **Collaboration with Jammu Kashmir Tourism Development Corporation (JKTDC):** A small percentage 2 per cent of respondents collaborated with the Jammu Tourism Development Corporation for joint promotion and packages. This suggests a limited but strategic engagement with the local tourism authority to harness institutional support and resources for mutual benefit.
- **Independent Operation:** The majority 74 per cent of respondents operate independently without feeling the need for partnerships. This indicates a prevailing sentiment among a significant portion of stakeholders to rely on autonomous operations and internal capabilities to drive competitiveness and sustainability.

4.4 Support Needed

4.4.1) Support required from authorities:



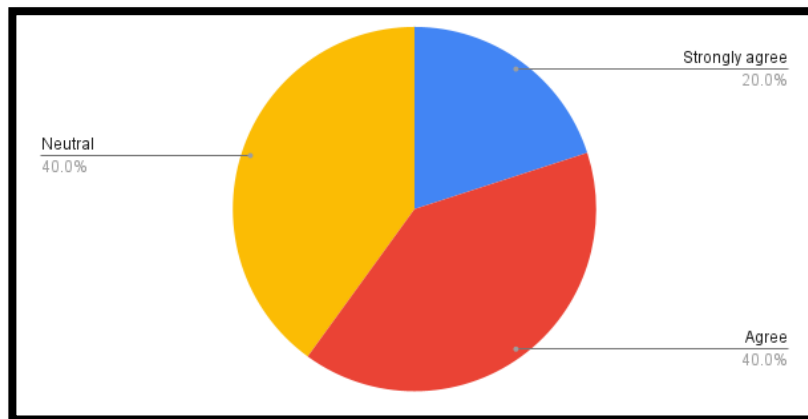
Key Insights of Responses

- **Infrastructure Development:** The majority 50 per cent of respondents prioritize infrastructure development as a key area for enhancing the tourism landscape in Jammu. This underscores the importance of robust infrastructure, including transportation, accommodation, and tourist facilities, to support visitor experiences and facilitate tourism growth.
- **Marketing and Promotion Initiatives:** 38 per cent of respondents emphasize marketing and promotion initiatives as critical for promoting Jammu as a tourist destination and attracting visitors. Effective marketing strategies can enhance destination visibility, highlight unique attractions, and stimulate visitor interest and engagement.
- **Improved Regulatory Environment:** 8 per cent of respondents advocate for an improved regulatory environment to create a conducive business environment for tourism stakeholders. This includes

streamlining regulations, reducing bureaucratic hurdles, and fostering a supportive policy framework to encourage investment and entrepreneurship in the tourism sector.

- **Financial Assistance and Skills Training:** A small percentage 2 per cent of respondents prioritize financial assistance and skills training to support tourism businesses and enhance workforce capabilities. This includes access to funding opportunities, capacity-building programs, and skills development initiatives aimed at improving service quality and professionalism in the tourism industry.
- **Training and Skills Development:** Similarly, 2 per cent of respondents highlight the importance of training and skills development for tourism stakeholders to enhance service standards, customer experiences, and industry professionalism. Training programs can equip individuals with the necessary knowledge, skills, and competencies to meet evolving market demands and deliver exceptional visitor experiences

4.4.2 Increased competition:

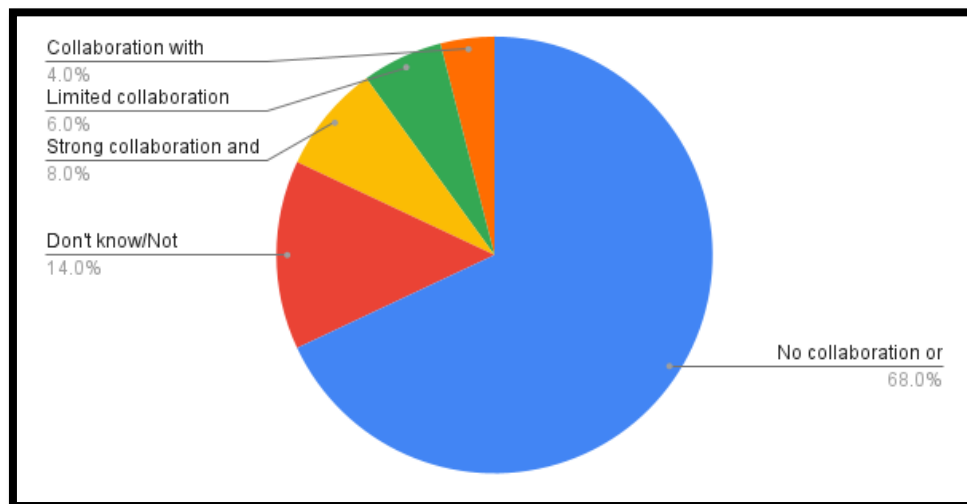


Key Insights of Responses Reported

- **Strongly Agree:** 20 per cent of respondents strongly agree that they have experienced heightened competition for tourists following the implementation of connectivity projects. This indicates a significant portion of stakeholders who hold a strong conviction regarding the increased competitive pressures faced by tourism businesses in Jammu.
- **Agree:** 40 per cent of respondents agree that they have experienced heightened competition for tourists post-connectivity projects. This aligns with a substantial portion of stakeholders acknowledging the presence of intensified competition in the tourism market, albeit without the same level of conviction as those who strongly agree.
- **Neutral:** 40 per cent of respondents express a neutral stance on the matter, indicating that they neither agree nor disagree with the perception of heightened competition post-connectivity projects. This

suggests a segment of stakeholders who may perceive the competitive landscape differently or have not observed significant changes in competition levels.

4.4.3 Collaborative efforts between stakeholders:

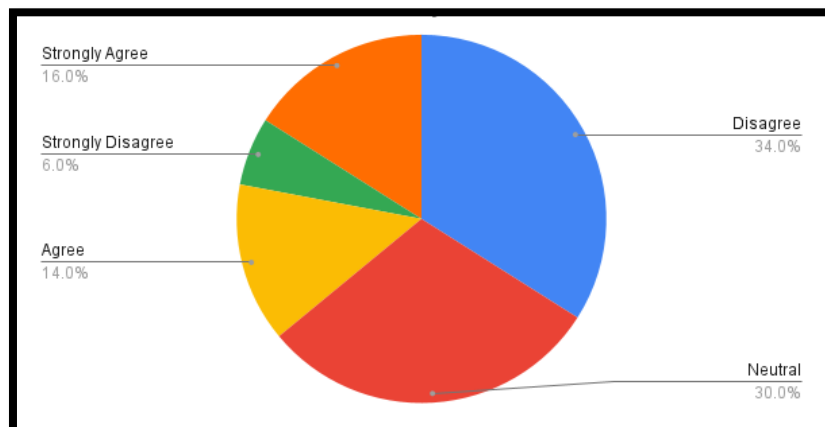


Key Insights of Responses

- **Strong Collaboration:** Only 8 per cent of participants confirm witnessing strong collaboration between tourism stakeholders. This indicates a relatively low level of robust collaboration within the Jammu tourism ecosystem, with a small portion of respondents observing significant collaborative efforts among industry players.
- **Limited Collaboration:** 6 per cent of respondents have seen limited collaboration in this direction. While a minor percentage acknowledges some degree of collaboration, the extent and effectiveness of these collaborative initiatives may be insufficient to drive substantial impact or outcomes.
- **No Collaboration:** A majority 68 per cent of respondents report no collaboration among tourism stakeholders. This highlights a prevalent lack of collaborative engagement within the Jammu tourism ecosystem, with a significant portion of stakeholders operating independently without actively partnering or collaborating with others.
- **Collaboration with Minimal Success:** 4 per cent of respondents have seen collaboration with minimal success. This suggests that while some collaborative efforts may exist, they may face challenges or limitations in achieving desired outcomes or impact, resulting in minimal effectiveness or tangible benefits.
- **Don't Know/Not Applicable:** 14 per cent of respondents indicate a lack of awareness or relevance regarding collaboration among tourism stakeholders. This segment may be less informed about collaborative initiatives or perceive collaboration as not applicable to their business context.

(4.5) Administrative Outlook

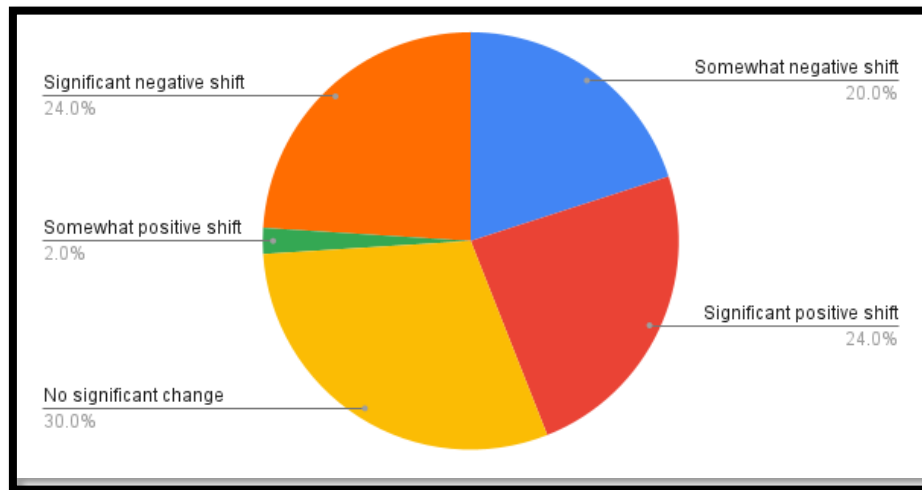
4.5.1 Has Administration Looked Forward to Concerns



Key Insights of Responses

- **Strongly Agree:** 16 per cent of respondents strongly agree that the administration has effectively addressed the issues raised by tourism stakeholders. This indicates a notable proportion of stakeholders who express confidence in the administration's responsiveness and proactive measures in resolving key concerns within the tourism sector.
- **Agree:** 14 per cent of respondents agree that the administration has addressed the issues raised by tourism stakeholders. While a smaller percentage than those who strongly agree, this segment still acknowledges the administration's efforts in addressing pertinent issues within the tourism industry.
- **Neutral Response:** 30 per cent of respondents have a neutral stance on whether the administration has addressed the issues raised by tourism stakeholders. This suggests a significant portion of stakeholders who remain ambivalent or undecided regarding the effectiveness of the administration's actions in addressing industry concerns.
- **Disagree:** 34 per cent of respondents disagree that the administration has adequately addressed the issues raised by tourism stakeholders. This represents a substantial proportion of stakeholders who express skepticism or dissatisfaction with the administration's responsiveness to industry concerns.
- **Strongly Disagree:** 6 per cent of respondents strongly disagree with the notion that the administration has addressed the issues raised by tourism stakeholders. While a smaller percentage, this segment reflects stakeholders who hold a huge negative view of the administration's handling of industry-related concerns.

4.5.2 Influence on local job market:

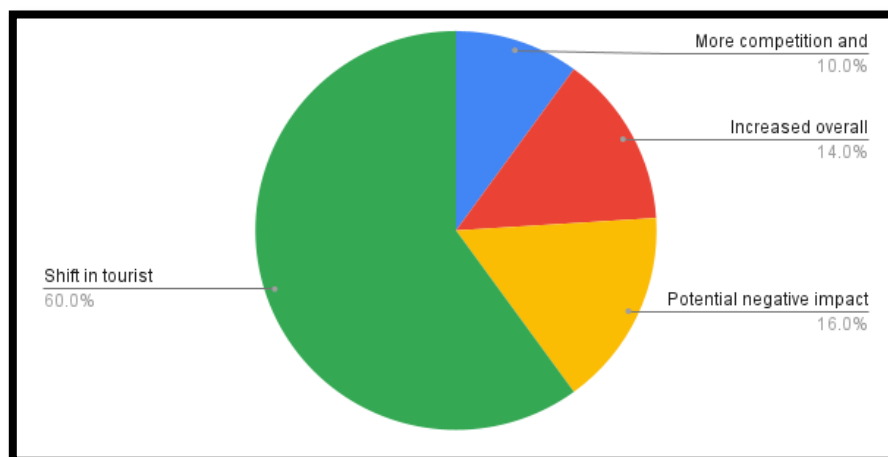


Key Insights of Responses Reported

- **Significant Positive Shift:** 24 per cent of respondents observed a significant positive shift in job opportunities within the Jammu tourism sector. This indicates a notable proportion of stakeholders who perceive an increase in employment opportunities, likely attributed to the influx of tourists and associated demand for tourism-related services and amenities.
- **Somewhat Positive Shift:** 2 per cent of respondents reported a somewhat positive shift in jobs resulting from the changing tourist footprint. While a smaller percentage, this segment still acknowledges a modest increase in job opportunities within the tourism sector, albeit to a lesser extent than those who observed a significant positive shift.
- **Significant Negative Shift:** 24 per cent of respondents witnessed a significant negative shift in job opportunities within the Jammu tourism sector. This suggests a substantial proportion of stakeholders who experienced a decline in employment opportunities, possibly due to factors such as reduced tourist arrivals or shifts in tourism patterns impacting specific sectors or businesses negatively.
- **Somewhat Negative Shift:** 20 per cent of respondents observed a somewhat negative shift in jobs, indicating a moderate decrease in employment opportunities within the tourism sector. This segment reflects stakeholders who perceive a noticeable but not severe decline in job opportunities compared to those experiencing a significant negative shift.
- **No Significant Change:** 30 per cent of respondents reported no significant change in job opportunities within the Jammu tourism sector. This highlights a sizable portion of stakeholders who did not observe substantial fluctuations in employment dynamics despite changes in tourist footprints or tourism-related developments.

(4.6) Overall Tourism Outlook

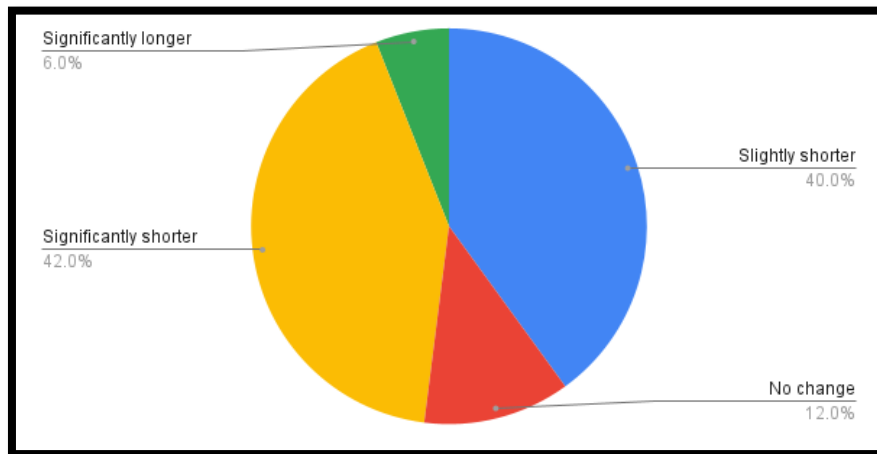
4.6.1 Longterm implications:



Key Insights of Responses Reported

- **Higher Overall Tourism Potential:** 14 per cent of respondents anticipate that improved connectivity will lead to higher overall tourism potential over time. This suggests a segment of stakeholders who believe that enhanced transport infrastructure will attract more tourists and diversify the tourism offerings in Jammu, potentially leading to sustained growth and expansion of the tourism sector.
- **Continued Shift of Tourist Demographic Profiles:** 60 per cent of respondents foresee a continued shift in tourist demographic profiles, with a preference for pilgrimage options. This indicates a predominant expectation among stakeholders that pilgrimage tourism will remain a dominant segment, driving tourist preferences and shaping the tourism landscape in Jammu in the foreseeable future.
- **Steady Growth with Competitive Pressures:** 10 per cent of respondents believe that tourism in Jammu will experience steady growth but with competitive pressures across various sectors. This suggests a cautious outlook among stakeholders, acknowledging the potential for growth but also recognizing the challenges posed by competition and market dynamics in the tourism industry.
- **Potential Negative Impact on Local Culture and Environment:** 16 per cent of respondents express concerns about the potential negative impact of increased tourism on local culture and the environment. This highlights a segment of stakeholders who are wary of the adverse consequences of tourism growth, such as cultural commoditisation, environmental degradation, and loss of authenticity, which may pose challenges to sustainable tourism development in Jammu.

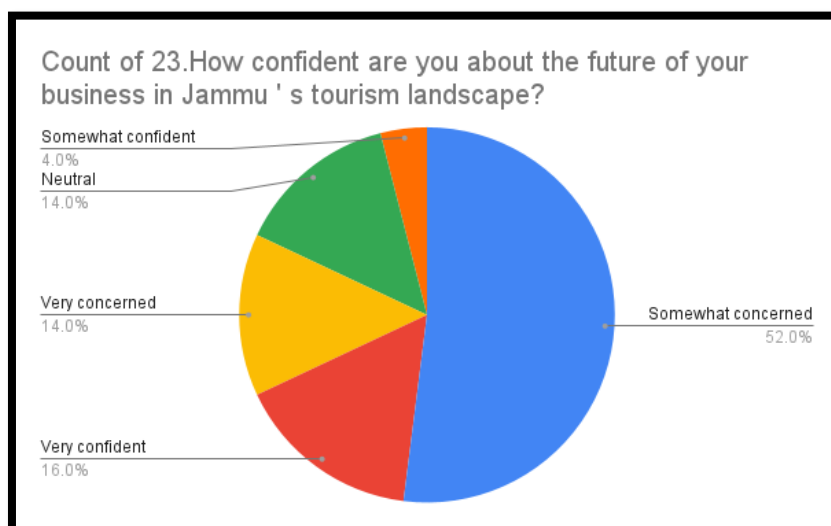
4.6.2 Change in tourist length of stay:



Key Insights of Responses Reported

- **Significantly Longer Stay Durations:** 6 per cent of respondents observed a significant increase in tourist stay durations. This suggests a small but notable segment of stakeholders who have witnessed tourists spending more time in Jammu, potentially exploring additional attractions or engaging in extended leisure activities.
- **Significantly Shorter Stay Durations:** 42 per cent of respondents reported a significant decrease in average stay durations among tourists. This indicates a substantial proportion of stakeholders who have observed a notable reduction in the length of tourists' stays, possibly influenced by factors such as changes in travel patterns, itinerary preferences, or accessibility to other destinations.
- **No Major Change in Stay Durations:** 12 per cent of respondents reported no significant change in tourist stay durations. This suggests a minority of stakeholders who perceive that tourist stay durations have remained relatively stable despite changes in transportation infrastructure and tourism dynamics.
- **Slightly Shorter Stay Durations:** 40 per cent of respondents reported a slight decrease in average stay durations among tourists. This represents a significant portion of stakeholders who have noticed a modest decline in the length of tourists' stays, albeit not as pronounced as those reporting significant reductions.

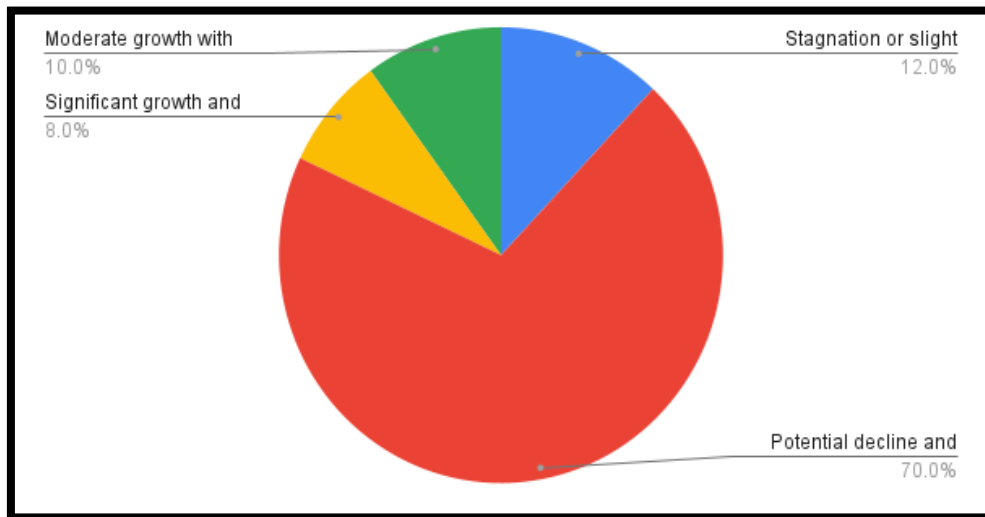
4.6.3 Confidence in future of business:



Key Insights of Responses Reported

- **Very Confident:** A notable 16 per cent of respondents expressed high confidence in the future of their businesses due to the expanding market opportunities facilitated by improved train connectivity. This segment of stakeholders perceives the evolving tourism landscape as conducive to business growth and development.
- **Somewhat Concerned:** The largest segment, comprising 52 per cent of respondents, expressed varying degrees of concern regarding the future of their businesses in the context of changing market dynamics. This suggests a prevalent sense of concern among stakeholders, uncertainties surrounding the impact of improved train connectivity on their operations.
- **Somewhat Confident:** A minor 4 per cent of respondents expressed some level of confidence in the future of their businesses despite underlying concerns. This segment of stakeholders acknowledges challenges but remains cautiously optimistic about their ability to navigate and adapt to changing market conditions.
- **Very Much Concerned:** A significant 14 percent of respondents expressed significant concerns about the future of their businesses in light of evolving market dynamics. This segment of stakeholders perceives considerable risks and challenges associated with the introduction of improved train connectivity, which may impact their business viability and sustainability.
- **Neutral:** Another 14 per cent of respondents adopted a neutral stance regarding their confidence levels, indicating a lack of strong conviction or definitive outlook on the future of their businesses in the context of changing market dynamics.

4.6.4 5-year tourism growth outlook:



Key Insights of Responses Reported

- **Significant Growth and Diversification:** 8 per cent of respondents foresee significant growth and diversification in Jammu's tourism sector. This segment of stakeholders anticipates that improved connectivity, coupled with strategic initiatives and investments, will unlock new opportunities for expansion and diversification, driving sustainable growth in the long term.
- **Stagnation or Some Decline:** A minority 12 per cent of respondents expect stagnation or a slight decline in Jammu's tourism industry. This suggests a cautious outlook among stakeholders, who foresee challenges or constraints that may impede significant growth or result in marginal setbacks in the tourism sector.
- **Potential Drop with Kashmir Rail Connectivity:** The majority, comprising 70 per cent of respondents, express concerns about the potential negative impact on Jammu's tourism industry if direct rail connectivity to Kashmir is successfully established. This segment of stakeholders anticipates that diverted tourist traffic to Kashmir may lead to a decline in tourist arrivals and revenue, posing significant challenges to the sustainability of tourism businesses in Jammu.
- **Moderate Growth with Adaptation:** A minor 10 per cent of respondents anticipate moderate growth in Jammu's tourism industry, contingent upon the ability of stakeholders to adapt and innovate in response to changing market dynamics. This segment acknowledges the challenges posed by external factors but remains optimistic about the prospects for gradual expansion and evolution in the tourism sector.

4.7 Key takeaways from the key findings and analysis

- The survey encompassed various segments of tourism stakeholders in Jammu, including hotels, restaurants, taxi services, souvenir shops, tour operators, and others. This diversity ensures a comprehensive understanding of the impact of improved train connectivity on different facets of the tourism industry.
- The majority of respondents have been operating in the Jammu tourism sector for over 10 years, indicating substantial experience and expertise in navigating the local tourism landscape. This longevity suggests that stakeholders possess in-depth knowledge of market dynamics and consumer behaviour.
- While the majority of respondents observed changes in tourist numbers following the introduction of improved train connectivity, a significant proportion reported negative impacts on their operations due to reduced tourist footfall. This underscores the complex interplay between infrastructure development and its implications for tourism businesses.
- Stakeholders hold varied opinions regarding the potential impact of direct train connectivity to Kashmir. While some foresee slight positive opportunities, the majority express concerns about significant negative consequences, such as diverted tourist flow and adverse economic effects.
- Stakeholders have implemented various strategies to adapt to shifting tourism patterns, including changes to marketing strategies, diversification of product/service portfolios, and forming partnerships. These proactive measures reflect stakeholders' resilience and agility in responding to evolving market dynamics.
- Infrastructure development emerges as a top priority for stakeholders, highlighting the critical role of robust infrastructure in enhancing the tourism landscape. Marketing and promotion initiatives are also deemed essential for attracting visitors and increasing destination visibility.
- A significant proportion of stakeholders acknowledge heightened competition in the tourism market post-connectivity projects. This underscores the need for differentiation and innovation among tourism businesses to maintain competitiveness and attract visitors.
- While some stakeholders report collaboration with other tourism stakeholders or government entities, a majority operate independently. Strengthening collaborative efforts could enhance industry cohesion and drive collective action to address common challenges.

- Views on the administration's effectiveness in addressing industry concerns are mixed, with some expressing confidence while others remain skeptical. Effective governance and policy support are crucial for fostering a conducive business environment and addressing industry needs.
- Stakeholders anticipate continued growth in pilgrimage tourism but express concerns about potential negative impacts on local culture and the environment. Balancing growth with sustainability will be essential for ensuring the long-term viability of Jammu's tourism industry.

Stakeholders report varying trends in tourist stay durations, with some observing significant increases or decreases. Understanding these trends can inform strategic decision-making and resource allocation to optimize visitor experiences.

- While some stakeholders express confidence in the future of their businesses, others harbour concerns about market uncertainties and competitive pressures. Proactive adaptation and strategic planning will be essential for navigating challenges and capitalizing on opportunities in the evolving tourism landscape.
- Stakeholders hold divergent views on the future trajectory of Jammu's tourism industry, with some foreseeing significant growth, while others anticipate stagnation or decline. Addressing concerns related to Kashmir rail connectivity and fostering sustainable growth will be imperative for realizing the sector's full potential.
- Overall, the survey findings highlight the nuanced complexities and opportunities within Jammu's tourism sector, underscoring the importance of strategic planning, collaboration and adaptive resilience in driving sustainable growth and resilience in the face of evolving market dynamics.

Chapter 5

5.1 Summary

The development of railway connectivity in Jammu and Kashmir, particularly focusing on the impacts of enhanced train connectivity between Jammu and Katra on tourism stakeholders in Jammu city. It outlines the historical development of railways in Jammu, starting from pre-partition plans in the early 1900s to major milestones like the completion of the Jammu-Katra line in 2014. The problem statement highlights the need to comprehensively assess the implications of improved Katra connectivity for tourism businesses in Jammu city. Through surveys of 50 diverse tourism stakeholders, the study offers insights into perceived impacts on tourist numbers, business operations, adaptations undertaken, collaboration dynamics, and overall outlook. Key findings indicate that while some stakeholders have witnessed positive impacts, the majority report reduced footfall and negative effects from heightened competition and potential tourist diversion to Kashmir. Proactive measures like infrastructure upgrades, collaborative platforms, sustainable practices, marketing campaigns and policy reforms are recommended to help Jammu capitalize on opportunities. The study underscores the nuanced complexities and need for evidence-based strategies to foster sustainable tourism growth in Jammu. Overall, it provides a detailed account of the multifaceted implications of transportation infrastructure enhancements for tourism stakeholders in the region.

5.2 Conclusion

In conclusion, this study offers valuable insights into the deep challenges and opportunities within Jammu's tourism sector that was being tried to understood through various methodologies involved , highlighting the importance of strategic planning, collaboration, and adaptive resilience to delve deep into identified key issues from negative shift in terms of tourist footfall to understanding grassroot reality of tourism stakeholder's. By implementing the proposed recommendations and addressing the identified limitations through future research efforts, stakeholders can navigate challenges and capitalize on opportunities to foster sustainable growth and resilience in the tourism industry. This study contributes to the ongoing discourse on tourism development in the region and underscores the significance of evidence-based decision-making in shaping the future of Jammu's tourism landscape. The comprehensive survey of 50 tourism stakeholders in Jammu offers invaluable insights into the complex impacts of enhanced train connectivity on the region's tourism landscape. The diversity of respondents, from hotels and restaurants to tour operators and taxi services, ensures perspectives encompassing different facets of Jammu's tourism industry to learn about multifaceted impact of train to Katra on Jammu city Tourism Stakeholder's In terms of upcoming connectivity enhancements, opinions diverge over the implications. While some foresee opportunities for unlocking untapped source markets through enhanced domestic access, predominant concerns exist

regarding tourist diversion and leakage if Kashmir rail link gets success then it may create a case of destination bypass with Jammu city therefore its quite important to look forward this matter and case or may be called as a concern of all Tourism Stakeholder's of Jammu City In conclusion, this study provides valuable insights into the challenges and opportunities within Jammu's tourism sector, underscoring the importance of strategic planning, collaboration, and adaptive resilience. Through various methodologies employed, the study delved deep into identified key issues, offering a nuanced understanding of the multifaceted impacts of enhanced train connectivity to Katra on Jammu's tourism stakeholders. The comprehensive survey of 50 tourism stakeholders in Jammu offers invaluable insights into the complex dynamics at play. From hotels and restaurants to tour operators and taxi services, the diversity of respondents ensures a holistic perspective on the implications of train connectivity for Jammu's tourism landscape. While, opinions diverge over the potential opportunities and concerns arising from enhanced connectivity, there is a prevalent apprehension regarding potential destination bypass if the Kashmir rail link succeeds. This concern echoes similar cases observed globally, where improved transportation infrastructure has led to tourists bypassing intermediary destinations in favour of direct routes to their final destinations. For instance, the development of high-speed rail links in Europe has resulted in some cities experiencing a decline in tourist footfall as visitors opt for faster and more convenient travel options. The perceived negative impact of train connectivity on tourist numbers in Jammu highlights the need for proactive measures to mitigate the challenges posed. Enhancing tourism infrastructure, promoting unique attractions, addressing safety concerns, and implementing effective marketing strategies are essential steps to attract tourists and revitalize Jammu's tourism sector. The, reported influence on the local job market from the changing tourist footprint suggests a mixed impact, influenced by various factors such as seasonality, economic fluctuations, skill mismatches, infrastructure development, and government policies. Targeted efforts to enhance tourism infrastructure, promote skill development, and implement supportive policies can help improve the outlook for local employment opportunities. In, conclusion, this study contributes to the ongoing discourse on tourism development in Jammu and underscores the significance of evidence-based decision-making in shaping the future of the region's tourism landscape. By addressing the identified challenges and capitalizing on opportunities, stakeholders can work towards fostering sustainable growth and resilience in Jammu's tourism industry, ensuring its long-term viability and competitiveness in the global tourism market.

5.3 Recommendations & Suggestions

Drawing from the comprehensive insights obtained from the survey and considering the impact of improved train connectivity to Katra on Jammu's tourism stakeholders, the following recommendations are proposed to address challenges and capitalize on opportunities:

- **Infrastructure Development:** Prioritize investments in upgrading transportation, accommodation, and other tourism-related infrastructure to enhance accessibility and visitor experiences. This includes improving roads, railway facilities, and expanding accommodation options to meet the growing demands

of tourists. Additionally, integrating technology solutions for better connectivity and visitor experience should be explored.

- **Marketing and Promotion:** Allocate resources towards effective marketing campaigns that showcase the unique attractions and experiences offered by Jammu. Collaborate with tourism boards, travel agencies, and digital platforms to amplify the reach of these initiatives and attract a diverse range of tourists. Leveraging social media influencers and implementing targeted digital marketing strategies can also yield significant benefits in reaching potential visitors.
- **Collaborative Efforts:** Foster collaboration among tourism stakeholders through networking events, knowledge-sharing platforms, and joint initiatives. Encourage partnerships between businesses, government entities, and local communities to address common challenges and capitalize on collective strengths. Establishing a centralized platform or association to facilitate collaboration and information exchange can further enhance industry cohesion.
- **Policy Support:** Streamline regulatory processes, provide incentives for tourism development, and ensure transparent governance to instil confidence and trust among industry players. Engage in dialogue with stakeholders to understand their concerns and priorities, and tailor policies accordingly to support sustainable growth. Establishing clear guidelines and standards for sustainable tourism practices can also guide industry players in adopting responsible behaviour.
- **Sustainability Focus:** Prioritize sustainable tourism practices by promoting environmental conservation, cultural preservation, and community engagement. Implement eco-friendly initiatives, support local communities, and encourage responsible visitor behaviour to safeguard Jammu's natural and cultural heritage. Investing in green infrastructure, renewable energy, and waste management systems can further contribute to sustainable development in the region.
- **Adaptive Strategies:** Embrace adaptive strategies to navigate uncertainties and capitalize on emerging opportunities. Diversify product offerings, enhance customer experiences, and remain responsive to changing market dynamics to maintain competitiveness and resilience. Investing in training and capacity building programs for tourism stakeholders can empower them to adapt to evolving trends and customer preferences.
- **Research and Monitoring:** Invest in ongoing research and monitoring of tourism trends, visitor preferences, and industry developments. Collect data, analyse insights, and engage in regular stakeholder consultations to inform evidence-based decision-making and strategic planning. Utilizing advanced analytics and predictive modelling techniques can provide valuable insights for anticipating future trends and challenges in the tourism sector.
- **Marketing Jammu as a Potential Destination:** Allocate a significant portion of resources towards innovative and impactful marketing campaigns aimed at positioning Jammu as a must-visit destination. Utilize a mix of traditional and digital marketing channels to reach a wide audience and create a memorable impression. Emphasize the unique cultural heritage, natural beauty, and diverse attractions of

Jammu through captivating storytelling, visually appealing content, and immersive experiences. Collaborate with influential personalities, travel bloggers, and media outlets to amplify the destination's visibility and generate buzz. Additionally, leverage strategic partnerships with travel agencies, airlines, and hospitality providers to offer exclusive packages and promotions that incentivize visitation. By fostering a compelling and aspirational brand image for Jammu, tourism stakeholders can attract more visitors and establish the destination as a top choice for travellers seeking authentic experiences and unforgettable memories.

5.4 Future Scope

- **Understanding the Ground Reality of Tourism Policies:** Conduct in-depth research to assess the actual implementation and effectiveness of tourism policies at the grassroots level in Jammu. Investigate how policies formulated at the governmental level translate into on-ground actions and outcomes for tourism stakeholders. Explore the challenges, barriers, and facilitators encountered in implementing tourism policies, including regulatory compliance, resource allocation, and stakeholder engagement. Utilize mixed-methods approaches, including interviews, surveys, and case studies, to gather insights from policymakers, industry players, and local communities. By uncovering the ground reality of tourism policies, this research can inform evidence-based policy formulation, identify areas for improvement, and enhance the overall governance and sustainability of the tourism sector in Jammu.
- **Assessing the Impact of Administrative Actions on Tourism Stakeholders:** Conduct a comprehensive study to evaluate the effectiveness of administrative actions in addressing the concerns raised by tourism stakeholders in Jammu. Explore the outcomes of policy interventions, regulatory reforms, and infrastructure development initiatives implemented by the administration to support the tourism industry. Utilize qualitative and quantitative research methods to gather feedback from stakeholders and measure their perceptions of the administration's responsiveness and effectiveness in meeting industry needs.
- **Analysing Infrastructure Development Priorities:** Investigate the specific infrastructure development priorities identified by stakeholders and assess their alignment with broader tourism development goals in Jammu. Explore the perceived benefits, challenges, and opportunities associated with infrastructure projects such as transportation upgrades, accommodation expansion, and tourist facility enhancements. Analyse the potential economic, social, and environmental impacts of infrastructure investments on tourism stakeholders and local communities.
- **Evaluating Marketing and Promotion Strategies:** Evaluate the effectiveness of marketing and promotion initiatives in positioning Jammu as a tourist destination and attracting visitors. Assess the reach, engagement, and conversion rates of marketing campaigns across various channels, including traditional media, digital platforms, and social media channels. Identify

best practices, emerging trends, and innovative approaches in destination marketing that can be leveraged to enhance Jammu's tourism brand and competitiveness.

- Exploring Regulatory Environment Improvements: Explore opportunities for improving the regulatory environment to foster a more supportive business environment for tourism stakeholders in Jammu. Analyse regulatory frameworks licensing procedures, and compliance requirements relevant to tourism businesses. Identify barriers to entrepreneurship, investment, and growth within the tourism sector and propose policy recommendations to address regulatory challenges and promote industry development.
- By addressing these research directions, future studies can provide valuable insights into the dynamics of tourism governance, infrastructure development, marketing strategies, regulatory frameworks, and capacity-building initiatives in Jammu. The findings can inform evidence-based policymaking, strategic planning, and resource allocation efforts aimed at fostering sustainable tourism development and enhancing the competitiveness of Jammu as a tourist destination.

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