

Mapping Himachal Pradesh's Tourism Trajectory: Insights into Temporal Trends and Geographical Patterns

Dr. Tarun Vats

(Assistant Professor of Geography, Gaur Brahman Degree College, Rohtak)

ABSTRACT

The tourism industry in Himachal Pradesh has experienced significant growth and transformation over the past few decades, emerging as a crucial driver of economic development in the state. This paper presents a comprehensive analysis of the growth patterns, trends, and spatial distribution of tourists' arrival in Himachal Pradesh from 1990 to 2022. The study utilizes data obtained from the Office of Department of Tourism and Civil Aviation, Shimla, and other reliable sources to provide insights into the dynamics of domestic and foreign tourism in the region.

The paper first highlights the overall growth of tourists' arrival, showcasing a steady increase over the years, with a notable surge in the early 2000s. Despite challenges such as the COVID-19 pandemic, which led to temporary declines, the tourism industry has shown resilience and adaptability. The analysis reveals varying growth rates and annual growth rates (AGR) for total, domestic, and foreign tourists' arrival, reflecting changing trends and market dynamics. The paper also delves into the spatial distribution of tourists' arrival across districts, identifying key hotspots such as Kullu, Manali, Shimla, and Dharamsala. These insights are crucial for policymakers and stakeholders to focus on targeted promotional strategies and infrastructure development to harness the full potential of tourism in Himachal Pradesh.

Keywords- Himachal Pradesh, Tourism, Growth, Spatial Distribution, Seasonality

INTRODUCTION

Himachal Pradesh's tourism industry has played a pivotal role in the state's economic development, showcasing immense potential across various destinations such as Kullu-Manali, Shimla, Dharamsala, and others. Analyzing the tourism growth from 1990 to 2022 reveals a steady increase in tourist footfall, except during the pandemic years of 2020 and 2021. Despite these challenges, total tourist numbers rose significantly from 1.94 million in 1990 to 15.10 million in 2022, with domestic tourists constituting a significant portion, increasing from 1.9 million to 17.9 million during the same period.

Foreign tourist arrivals, though growing, remain less than domestic numbers, increasing from 0.019 million in 1990 to 0.29 million in 2022, with noticeable fluctuations. The proportion of foreign tourists to total tourists grew initially but declined after 2016, indicating a need to re-evaluate marketing strategies and attractions for international visitors. Infrastructure growth, measured by registered stay units and bed capacity, has shown significant improvements but lags behind tourist influx, especially during peak seasons. Stay units increased from 440 in 1990 to 8030 in 2022, with notable growth post-2016. Bed capacity also rose but with periodic dips, indicating a need for consistent investment in accommodation infrastructure.

Spatially, districts like Kullu, Shimla, and Mandi attract the most tourists, showcasing the importance of targeted promotional strategies and infrastructure development in these areas. Understanding seasonal trends is crucial, with summer being the peak season for domestic tourists and monsoon season preferred by foreign tourists. The analysis shows varying growth rates and annual growth rates (AGR) for total, domestic, and foreign tourists' arrival, reflecting evolving market dynamics. Domestic tourists contribute significantly with steady growth rates, while foreign tourists face fluctuations and negative AGR recently, challenging the state's tourism strategy. The study also emphasizes the necessity for continuous investment in accommodation infrastructure and tourism resources as tourism in the state is concentrated to the few

Aims and Objectives

The objectives of the present research paper are to study and examine:

1. Growth of tourists' arrival both domestic and foreign.
2. Spatial distribution of tourists' arrival in the state.
3. Spatial patterns of tourism seasonality in the state.

Methodology

To analyse the spatio-temporal patterns of growth in tourists' arrival during the study period (1990-2022), AGR and GR (Base Year) have been calculated for different attributes like tourists' arrival, bed capacity and stay units.

Annual Growth Rate and been calculated through following formulas;

Annual Growth Rate (AGR) $\rightarrow [(Current\ Year\ Tourists'\ Arrival - Previous\ Year\ Tourists'\ Arrival) \div (Previous\ Year\ Tourists'\ arrival)] \times 100$

Growth Rate by Considering Base Year $\rightarrow [(Current\ Year\ Tourists'\ Arrival - Base\ Year\ Tourists'\ Arrival) \div (Base\ Year\ Tourists'\ arrival)] \times 100$

The district wise data pertaining to domestic as well as foreign tourists flow for the year 2022 in the state has been collected from department of tourism and civil aviation, Shimla. A dot map has been prepared to show the spatial distribution of tourist arrival by using arc gis 10.8. Spatial patterns of district level seasonality have been calculated by dividing tourists' arrival in three seasons: winter (November-February), summer (March-June) and monsoon (July- October) since 1991-2022.

Table 1 Himachal Pradesh: Growth Rate of Total Tourists' Arrival, 1990-2022							
Year	Total Tourists	Growth Rate (Percent)	AGR (Percent)	Year	Total Tourists	Growth Rate (Percent)	AGR (Percent)
1990	1942563	Base Year		2007	8821397	354	10.9
1991	2383348	23	22.69	2008	9749433	402	10.5
1992	2957425	52	24.09	2009	11437155	489	17.3
1993	2889639	49	-2.29	2010	13265602	583	16.0
1994	3438236	77	18.98	2011	15089406	677	13.7
1995	3099358	60	-9.86	2012	16146332	731	7.0
1996	3528000	82	13.83	2013	15129835	679	-6.3
1997	3892947	100	10.34	2014	16314400	740	7.8
1998	4245572	119	9.06	2015	17531153	802	7.5
1999	4444287	129	4.68	2016	18450520	850	5.2
2000	4681320	141	5.33	2017	19601533	909	6.2
2001	5244800	170	12.04	2018	16450503	747	-16.1
2002	5103300	163	-2.70	2019	17212107	786	4.6
2003	5856677	201	14.76	2020	3213379	65	-81.3
2004	6549413	237	11.83	2021	5637102	190	75.4
2005	7135532	267	8.95	2022	15100277	677	167.9
2006	7953471	309	11.46				
Source: Based on data obtained from Office of Department of Tourism and Civil Aviation, Shimla, 2010, 2016 and 2023 and cited from https://himachaltourism.gov.in/ Note: Tourists' Arrival data from 1990-1996 is exclusive from religious domestic tourists.							

Results and Discussion

Growth of Total Tourists' Arrival: 1990-2022:

Tourists' arrival statistics indicate that there has been a balanced increase in tourists' arrival in the state over the years except the corona pandemic years 2020 and 2021. From the Table 1, it has been found that the total tourist traffic increased from 1.94 million in 1990 to 4.68 million in 2000 and 13.2 million in 2010 and approximately 15.10 million in 2022, which is almost double to the states' population. The tourists' arrival in the region has been increasing steadily. The maximum number of total tourists' arrival (18.4 Million) was recorded in the year 2016 and minimum (1.9 Million) was in the year 1990. The growth rates of total tourists' arrival (on the basis of Base Year 1990) increased from 23 to 677 percent during 1991 to 2022 (Table 1).

As far as AGR is concerned, less consistency has been found in AGRs of total tourists' arrival as compared to the base year growth. During the period 2003 to 2011, the AGRs of total tourists' arrival were stable and satisfactory while after 2012 a declining trend is noticed in the tourists' arrival of the state. A sharp decline has been noticed in the year 2020 and it was because of pandemic lockdown. The negative annual growth rate of total tourists' arrival was experienced in the years 1993, 1995, 2002, 2013, 2018 and 2020 (Table 1).

Growth of Domestic Tourists' Arrival:

Domestic tourists play a significant role in the tourism development of the state. The domestic tourists' traffic increased from only 1.9 million in 1990 to 4.57 million in 2000 and 12.8 million in 2010 and approximately 17.9 million 2016. The maximum number of domestic tourists' arrival 15.07 million was recorded in the year 2022 and minimum 1.9 million was in the year 1990 (Table 2). The growth rate trends of domestic tourists' arrival obtained are same as growth rate of the total tourists' arrival. The growth rate of domestic tourist arrival increased from (Base Year 1990) 23 to 684 percent during 1990–2022.

Table 2 Himachal Pradesh: Growth Rate of Domestic Tourists' Arrival, 1990-2022							
Year	Domestic Tourists	Growth Rate (Percent)	AGR (Percent)	Year	Domestic Tourists	Growth Rate (Percent)	AGR (Percent)
1990	1923044	Base Year	---	2007	8481988	341	10.6
1991	2368031	23	23.14	2008	9372697	387	10.5
1992	2939650	53	24.14	2009	11036572	474	17.8
1993	2877445	50	-2.12	2010	12811986	566	16.1
1994	3386412	76	17.69	2011	14604888	659	14.0
1995	3051455	59	-9.89	2012	15646048	714	7.1
1996	3476640	81	13.93	2013	14715586	665	-5.9
1997	3830420	99	10.18	2014	15924701	728	8.2
1998	4170366	117	8.87	2015	17125045	791	7.5
1999	4352843	126	4.38	2016	17997750	836	5.1
2000	4570129	138	4.99	2017	19130541	895	6.3
2001	5111772	166	11.85	2018	16093935	737	-15.9
2002	4958917	158	-2.99	2019	16829231	775	4.6
2003	5544414	188	11.81	2020	3170714	65	-81.2
2004	6345069	230	14.44	2021	5632270	193	77.6
2005	6927742	260	9.18	2022	15070944	684	167.6
2006	7671902	299	10.74				

Source: Based on data obtained from <https://himachaltourism.gov.in/> 2010, 2016 and 2022.

As far as AGR is concerned, in 2003 to 2011, the AGRs of domestic tourists' arrival were stable and satisfactory while after 2012 a declining trend is noticed in the tourists' arrival of the state. The negative growth rate of domestic tourists' arrival was obtained in the years 1993, 1995, 2002, 2013, 2018 and 2020 (Table 2).

Growth of Foreign Tourists' Arrival

Although, the flow of foreign tourists' is increasing in the state yet the number is much less than the domestic tourists' arrival. The foreign tourists' arrival increased from a meagre 0.019 million in 1990 to 0.11 million in 2000 and 0.45 million in 2010 and approximately 0.45 million in 2016 and 0.29 million in 2022. The maximum number of foreign tourists' arrival (0.45 million) was recorded in the year 2016 and a minimum of 0.019 million was in the year 1990. The growth rate trend of foreign tourists' arrival shows a massive growth as compared to total or domestic tourists' arrival. The growth rate of foreign tourists' arrival increased from (Base Year 1990) -21 to 2232 percent during 1991–2016 and after the year of 2016, a very sharp decline has been noticed till 2022 (Table 3).

A negative growth rate of foreign tourists' arrival was recorded in the years 1991, 1992, 1993 and 2021. It increases with a great pace, especially during 2003 to 2012. In the year 2003, the growth rate reached as high as 1508 percent. It rises up to 2232 percent in the year 2016 (Table 3).

Table 3
Himachal Pradesh: Growth Rate of Foreign Tourists' Arrival, 1990-2022

Year	Foreign Tourists	Growth Rate (Percent)	AGR (Percent)	Year	Foreign Tourists	Growth Rate (Percent)	AGR (Percent)
1990	19419	Base Year	---	2007	339409	1648	20.54
1991	15317	-21	-21.12	2008	376736	1840	11
1992	17775	-8	16.05	2009	400583	1963	6.33
1993	12194	-37	-31.4	2010	453616	2236	13.24
1994	51824	167	325	2011	484518	2395	6.81
1995	47903	147	-7.57	2012	500284	2476	3.25
1996	51360	164	7.22	2013	414249	2033	-17.2
1997	62527	222	21.74	2014	389699	1907	-5.93
1998	75206	287	20.28	2015	406108	1991	4.21
1999	91444	371	21.59	2016	452770	2232	11.49
2000	111191	473	21.59	2017	470992	2325	4.02
2001	133028	585	19.64	2018	356568	1736	-24.29
2002	144383	644	8.54	2019	382876	1872	7.38
2003	312263	1508	16.29	2020	42665	120	-88.86
2004	204344	952	21.7	2021	4832	-75	-88.67
2005	207790	970	1.69	2022	29333	51	507.06
2006	281569	1350	35.51				

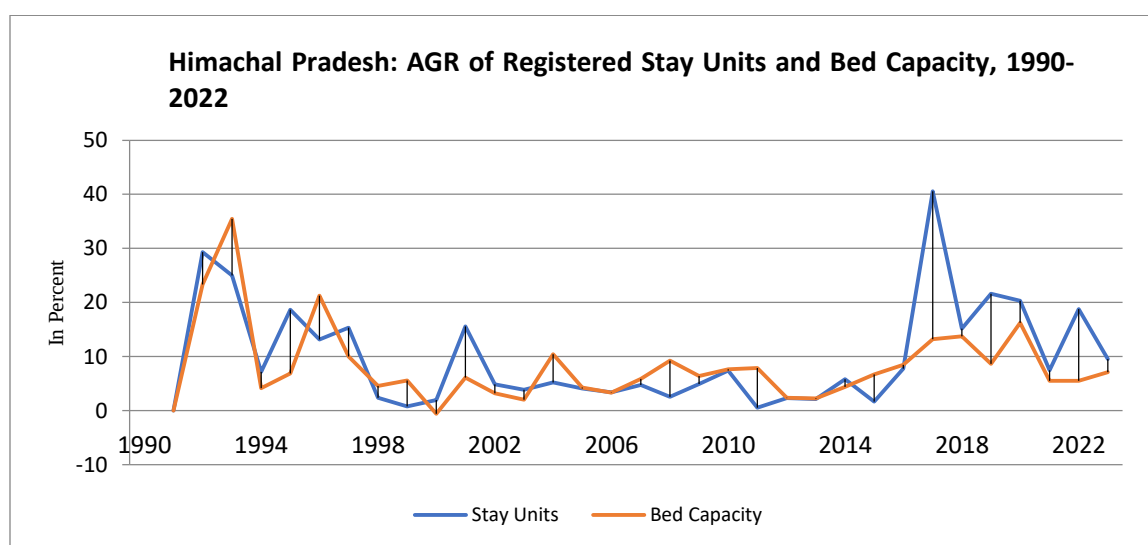
Source: Source: Based on data obtained from <https://himachaltourism.gov.in/>

Very high values are also due to the fact that the tourists' arrivals in the previous years were too less, mostly because of lack of infrastructure facility, communication and connectivity to the high altitude regions. However, during recent years, the number is increasing at a very high rate. The growth trends of domestic tourists' arrival are not as encouraging as international trends; nevertheless, the image of the entire region has been changing sharply. As far as AGR is concerned, the highest AGR was recorded in the year 2006 (35.51 percent). The AGR of foreign tourists' arrival remains very high during 1997 to 2001 while positive ups and downs were found during 2002 to 2010. AGR of foreign tourists' arrival has been declining sharply since 2011 which is a matter of grave concern for the state tourism industry. The negative AGR of foreign tourists' arrival was obtained during the years 1991, 1993, 1995, 2013, 2014, 2018, 2020 and 2021 (Table 3).

Growth of Registered Stay Units and Bed Capacity

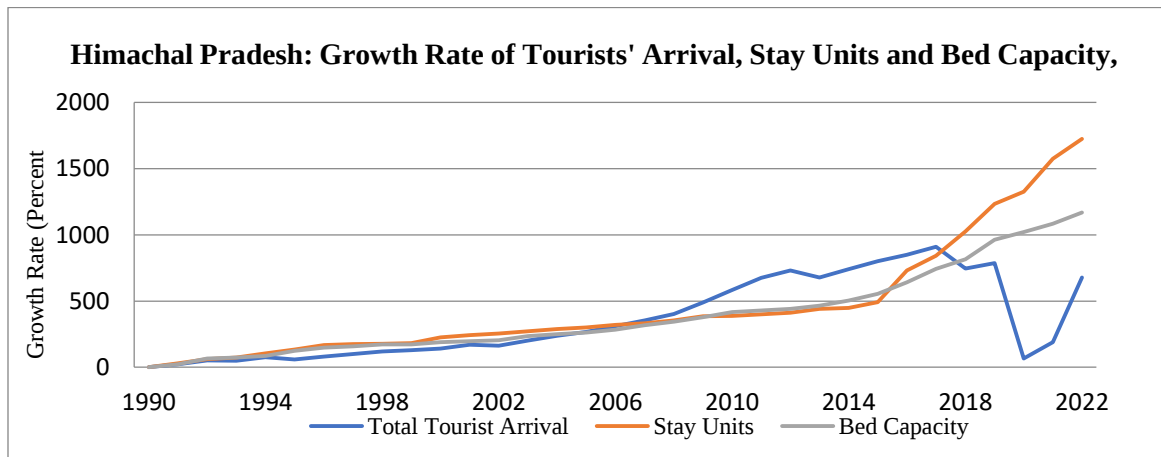
The data on registered stay units and bed capacity are considered in the form of absolute units, annual growth rate in percentage and growth rate with respect to the base year as 1990, during the study period from 1990 to 2022 in Himachal Pradesh. After analyzing the data, it was found that stay units increased from 440 units in 1990 to 8030 units in 2022. It has been recorded that the growth rate (Base Year 1990) of stay units increased from 29 percent in 1991 to 1725 percent in 2022, while the average AGR was 10.12 percent during the study period. The year 1991, 1992, 1994, 1995, 1996, 2000, 2016 to 2019, 2021 and 2022 have recorded more than average annual percentage of growth (10.12 percent) with respect to its previous year, which reflects a huge infrastructural development gap in one decade since 2001 to 2015 in which AGR of stay units remained less than states' average. It was only in 2016 when very high (40.55 percent) AGR was recorded.

Figure 1



In case of Bed Capacity, total number of bed capacity in the state is has increased from 10833 to 137351 units during the period 1990-2022. The growth rate (Base Year 1990) of total bed capacity increased from 23 percent in 1991 to 1168 percent in 2022, while the average AGR remains at 8.47 percent during the study period. Overall, the patterns of total bed capacity in Himachal Pradesh reflect that very less accommodation facility is available compared to the total number of tourists' arrival. Recently, the state's 'Home Stay' scheme helped increase the number of registered stay units but the bed capacity has not improved much (Fig. 1) because, on an average, only two or three rooms are available in these registered home stays. The growth trends presented in Figure 2 depicted that there was a relative balance in between total tourists' arrival, stay units and bed capacity till 2007 but beyond it the number of tourists' arrival increased with a very great pace as compared with growth of stay units and bed capacity till 2018. A declining trend has been noticed during 2020 and 2021 because of the impact of Covid Pandemic. But there has been a continuous uptrend has been found in case of stay units while bed capacity increased with a normal pace.

Figure 2

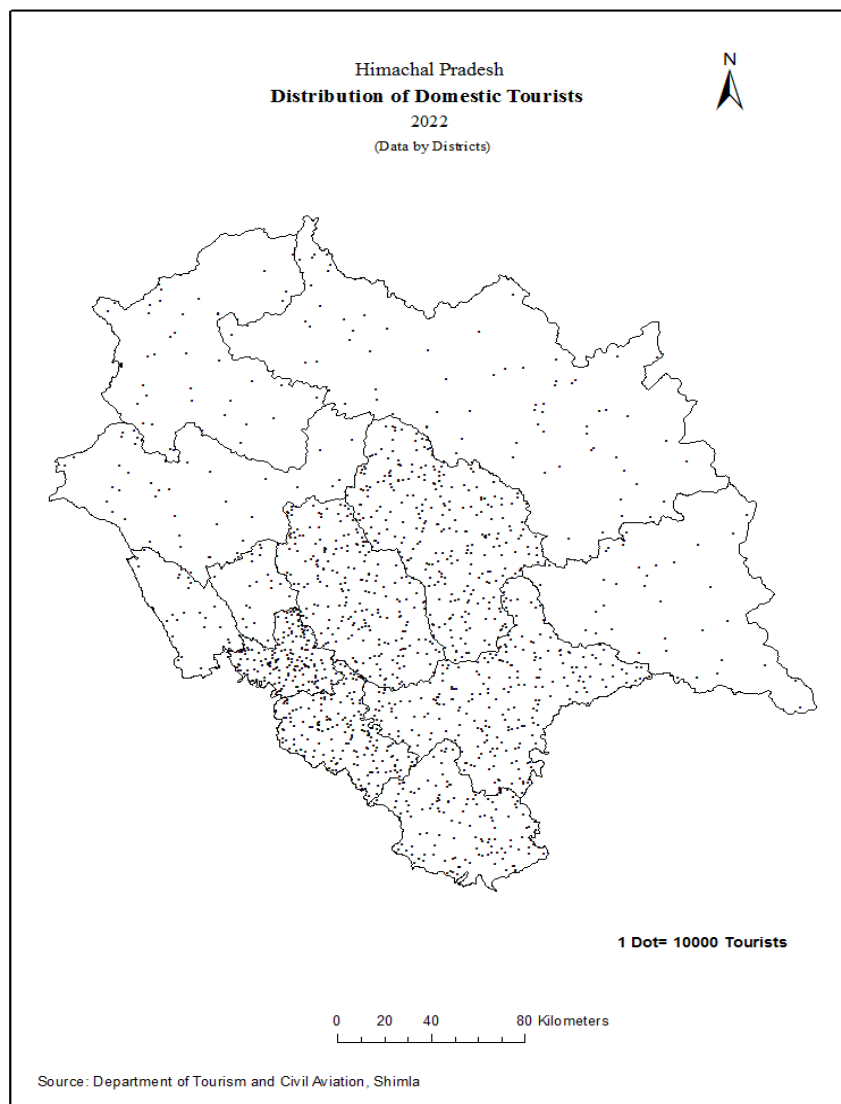


Spatial Distribution of Tourists' Arrival

The distribution of total tourist arrivals in 2022 reveals a notable concentration in specific districts. Kullu district recorded the highest number of tourists at 19.1%, followed by Shimla at 17.1% and Mandi at 15% (Table 6).

Figure 3

Himachal Pradesh: Districtwise Domestic Tourist Arrival, 2022



This pattern was also reflected in domestic tourist arrivals. Out of twelve districts, six districts i.e. the districts of Kullu, Shimla, Mandi Bilaspur, Solan, Bilaspur and Sirmaur contributes more than 85 percent of states' total domestic tourist arrival. After Covid-19 influential years, the district of Kangra slips from third favorable district to 8th position in case of domestic tourist arrivals. Foreign tourist arrivals in the state showed a different trend. Shimla district emerged as the top choice for foreign tourists at 36.5%, followed by Kangra at 22.3%, Kullu and Lahaul Spiti both at 12.6%. These four districts contribute more than 85 percent of total foreign tourist arrivals in the state. On the other hand, the contribution of the other districts like Bilaspur, Hamirpur, Una and Sirmaur remained less than one percent in terms of foreign tourist arrivals of the state.

Figure 4

Himachal Pradesh: Districtwise Foreign Tourist Arrival, 2022

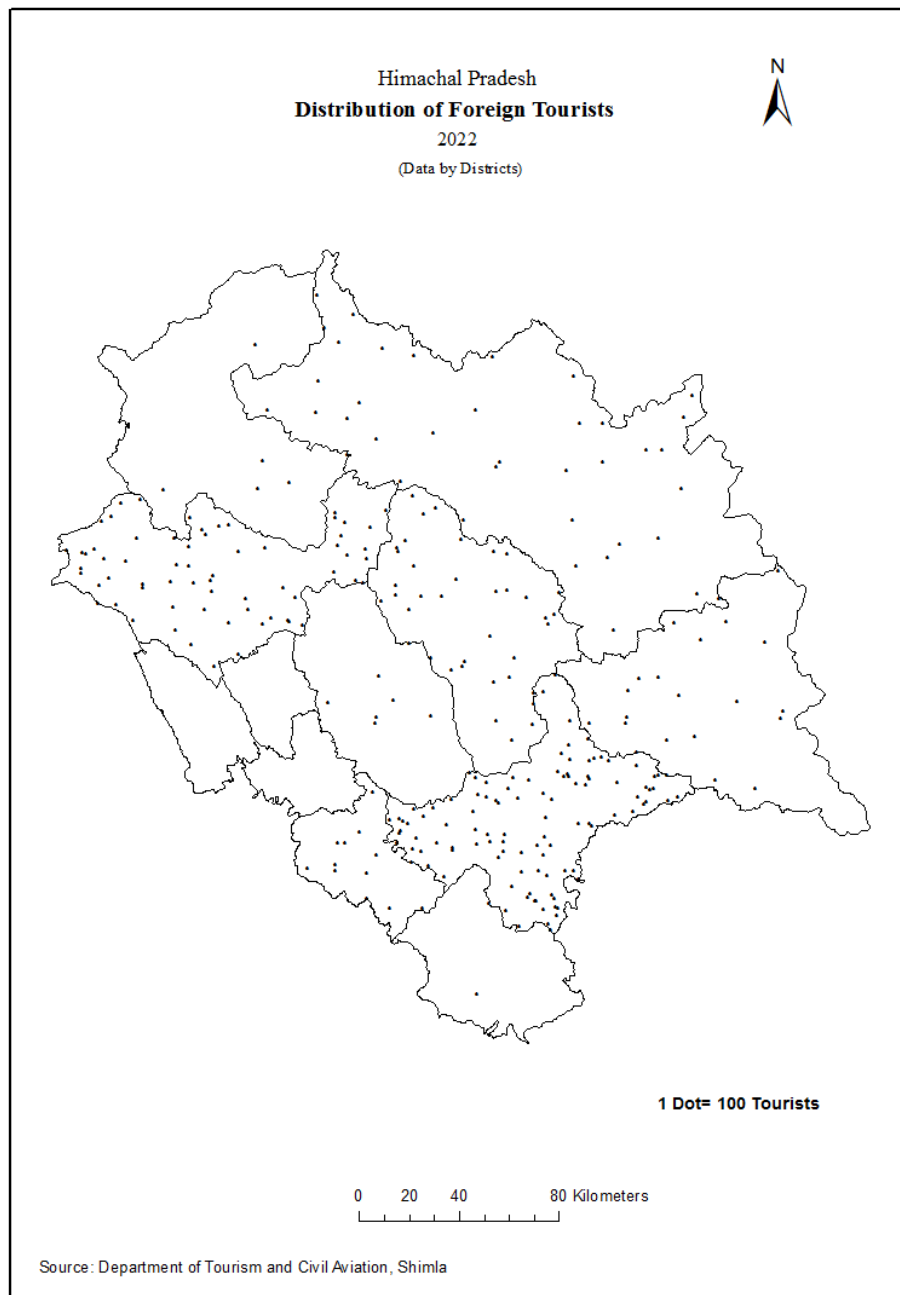


Table 6

Himachal Pradesh: Districts Share in State Total Tourists' Arrival, 2022

	Total Tourists	Share in State (In Percent)	Domestic Tourists	Share in State (In Percent)	Foreign Tourists	Share in State (In Percent)
Bilaspur	1844175	12.2	1844175	12.2	0	0
Chamba	411099	2.7	410584	2.7	515	1.8
Hamirpur	206255	1.4	206255	1.4	0	0
Kangra	410843	2.7	404305	2.7	6538	22.3
Kinnaur	384175	2.5	382211	2.5	1964	6.7
Kullu	2880219	19.1	2876513	19.1	3706	12.6
Lahaul Spiti	745850	4.9	742058	4.9	3792	12.9
Mandi	2271734	15.0	2271014	15.1	720	2.5
Shimla	2575967	17.1	2565269	17.0	10698	36.5
Sirmaur	1383841	9.2	1383705	9.2	136	0.5
Solan	1755813	11.6	1754554	11.6	1259	4.3
Una	230306	1.5	230301	1.5	5	0.0
Total	15100277	100.0	15070944	100.0	29333	100
Source: Computed By researcher based on data obtained from Office of Department of Tourism and Civil Aviation, Shimla, 2010, 2016 and 2022.						

Spatial Patterns of Seasonality

Table 7, the seasonal bifurcation of domestic and foreign tourists' arrival at district level exposed that total number of tourists' arrival remained maximum in summer season, followed by monsoon and winter season. Foreign tourists prefer to visit in the monsoon season while domestic tourists prefer to visit in the summer season which breaks the dominance of summer tourists in the state. The district wise seasonal variations of domestic and foreign tourists' arrival throughout the study period have been shown in Figure 5 and 6 respectively.

In case of domestic tourists' arrival, it has been found that out of 12 districts, 11 districts experienced highest tourists' arrival in summer season followed by monsoon season. It is because firstly, the domestic tourists visit the state to escape from the hot summer season experienced by rest of Himalayan region and secondly, it is the time when summer vacations are being enjoyed by almost all the educational institutes in the neighbouring states. Only district Chamba had experienced highest number of domestic tourists' arrival in monsoon season rather than in summer season. It was found that the Chamba fair which is popularly known as 'Minjar Mela' and 'Manimahesh Yatra' organised in monsoon season attracts a large number of religious domestic tourists from throughout the country.

Seasonal variations in foreign tourist arrivals reflected that out of a total of 12 districts, only four districts Shimla, Kullu, Kangra and Kinnaur on tributes more than 85 percent of total foreign tourists' arrival in the state. All these four districts have experienced more foreign tourists in monsoon season rather than summer or winter. Seven districts practised greater number of foreign tourist arrivals in summer season followed by monsoon. These districts were Sirmaur, Solan, Chamba, Una, Hamirpur, Kangra and Lahaul Spiti.

Table 7

Himachal Pradesh: Seasonal Variations in Tourists' Arrival: 1992-2022

Sr. No.	Domestic Tourists' Arrival				Foreign Tourists' Arrival		
	District	Winter	Summer	Monsoon	Winter	Summer	Monsoon
1	Bilaspur	5571467	9684835	8871836	2890	2754	1989
2	Chamba	4563566	6745467	7280753	7776	18241	15629
3	Hamirpur	2671081	4030939	3616614	267	316	245
4	Kangra	8615738	15219182	14365935	384189	765715	650492
5	Kinnaur	432994	1865709	1414264	8693	61295	103813
6	Kullu	11961218	26899606	20578876	413447	790588	984400
7	Lahaul Spiti	450306	2086582	2043116	9231	97975	540152
8	Mandi	5795231	7077363	6437768	44603	64826	74872
9	Shimla	15989716	24578355	19370228	626193	874741	916000
10	Sirmaur	5369029	6433545	6065705	10606	18598	14672
11	Solan	5318501	6600875	6289831	34452	43850	31479
12	Una	4505113	7174220	7012732	962	1345	1152
	Total	71243960	118396678	103347658	1543309	2740244	3334895

Source: Computed by researcher based on data obtained from Office of Department of Tourism and Civil Aviation, Shimla.

Figure 5

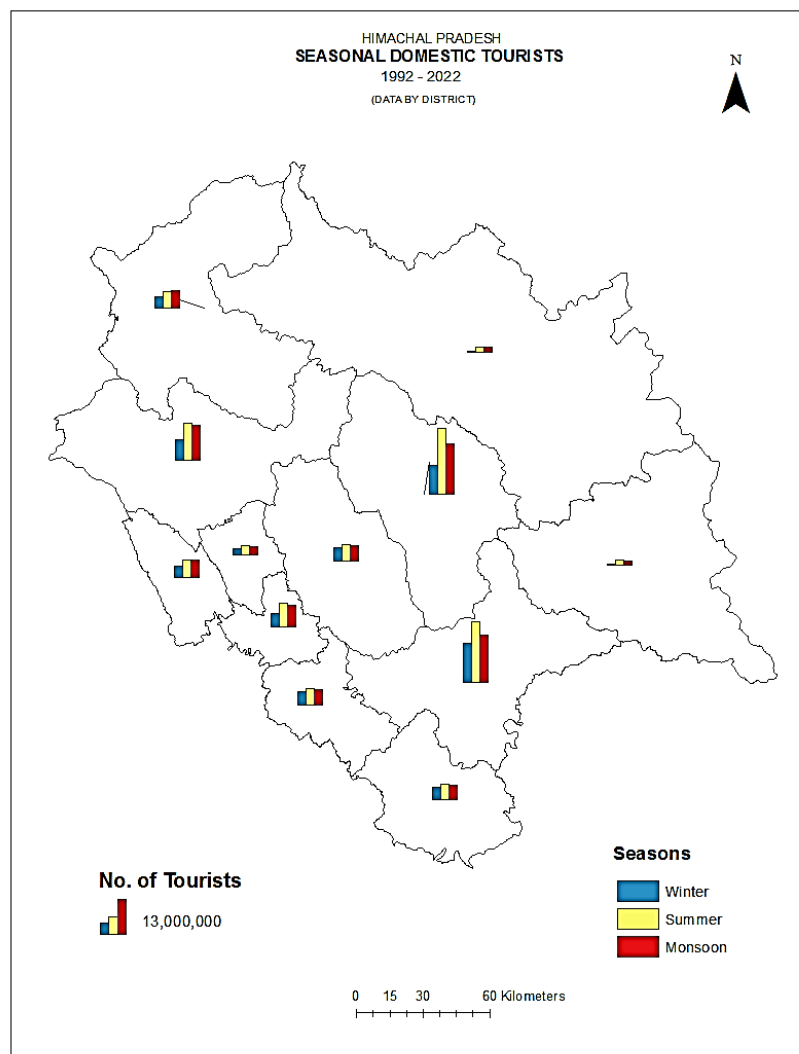
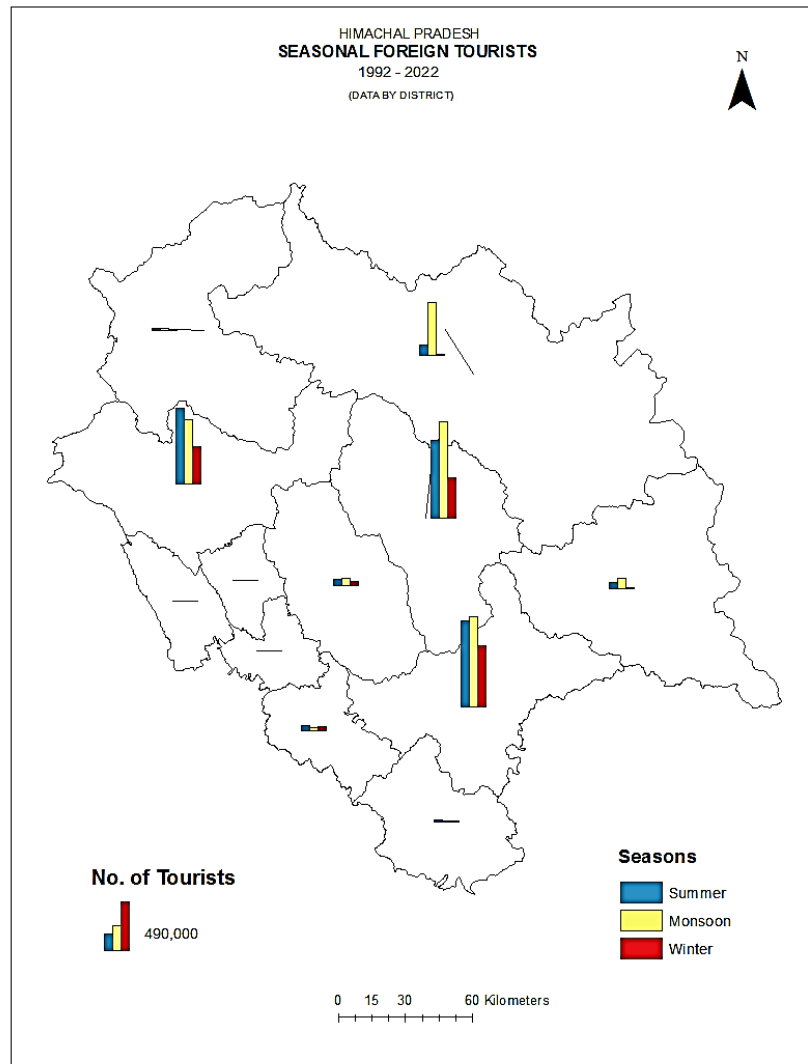


Figure 6



Conclusion

A standout finding is the consistent growth trajectory in tourist arrivals over the years, with a notable surge post-2000, showcasing the resilience of Himachal Pradesh's tourism industry. Despite facing setbacks such as the COVID-19 pandemic, which led to temporary declines, the sector has demonstrated adaptability and recovery potential.

The study sheds light on the distinct trends between domestic and foreign tourist arrivals. While domestic tourism shows steady growth rates and substantial contributions to the sector, foreign tourist arrivals exhibit fluctuations and negative annual growth rates in recent years. This divergence poses challenges for the state's tourism strategy, necessitating a re-evaluation of marketing approaches and attractions to better cater to international visitors. Moreover, the analysis of registered stay units and bed capacity highlights the need for continuous investment in accommodation infrastructure. While there have been significant improvements in registered stay units over the years, bed capacity still lags behind, especially during peak seasons. This underscores the importance of scaling up accommodation options to meet the rising demand from tourists. Spatially, the research identifies key tourism hotspots like Kullu, Shimla, Kangra and Mandi emphasizing the importance of targeted promotional efforts and infrastructure development in these areas. Understanding the spatial distribution of tourist arrivals enables policymakers and stakeholders to allocate resources effectively and enhance visitor experiences. The findings also underscore seasonal variations in tourist preferences, with domestic tourists favouring summer visits and foreign tourists showing a preference for the monsoon season. Understanding these seasonal patterns is crucial for designing targeted marketing

campaigns and developing season-specific tourism packages to attract diverse visitor segments throughout the year.

Overall, the research offers actionable insights for stakeholders, policymakers, and industry players to formulate data-driven strategies that capitalize on Himachal Pradesh's tourism strengths while addressing key challenges to ensure sustainable growth and competitiveness in the global tourism landscape.

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