

EXPLORING THE POTENTIAL OF

DOMESTIC TRAVEL AND TOURISM IN PAKISTAN

First Edition

**A KEY DRIVER OF ECONOMIC DEVELOPMENT
IN PAKISTAN**



Economic Council
Employers' Federation
of Pakistan

EXPLORING THE POTENTIAL OF

DOMESTIC TRAVEL AND TOURISM IN PAKISTAN

**A KEY DRIVER OF ECONOMIC DEVELOPMENT
IN PAKISTAN**



**A BENCHMARK STUDY TO GUIDE DECISION MAKERS,
HOSPITALITY INVESTORS AND DOMESTIC TRAVELERS**

- **2020-21 Travel & Tourism Survey**
- **Province-wise Investment Opportunities**
- **Snapshot of Hospitality Landscape**
- **International Best Prices**
- **Destination Branding Ideas**
- **Adventure Tourism Prospects**
- **Future Projects of Government**



**Economic Council
Employers' Federation
of Pakistan**





CHILAM JOSHI FESTIVAL

Chitral, Khyber Pakhtunkhwa
Photo Credit: Nanga Parbat Adventures



EMPLOYERS' FEDERATION OF PAKISTAN

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Employer's Federation of Pakistan

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LIST OF ACRONYMS

EFP	Employers' Federation of Pakistan
GSTC	Global Sustainable Tourism Council
CPEC	China-Pakistan Economic Corridor
WBG	World Bank Group
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNIDO	United Nations Industrial Development Organization
SDG	Sustainable Development Goals
PIA	Pakistan International Airlines
UNWTO	United Nations World Trade Organization
UNDP	United Nations Development Program
MSME	Micro Small Medium Enterprises
LED	Local Economic Development
RTP	Responsible Tourism Project
CHICOP	Chumbe Coral Park
CACTs	Art, Culture, and Tourism Centers
PTDC	Pakistan Tourism Development Corporation
GHE	Global Himalayan Expedition
PITHM	Pakistan Institute of Tourism & Hotel Management
PHA	Parks and Horticulture Authority
TAAP	Travel Agents Association of Pakistan
PATO	Pakistan Association of Tour Operators
TDCP	Tourism Development Corporation of Punjab
STDC	Sindh Tourism Development Corporation
TCKP	Khyber Pakhtunkhwa Culture and Tourism Authority
IoBM	Institute of Business Management
TTCI	Travel and Tourism Competitiveness Index
DTS	Department of Tourist Services
NTS	National Tourism Strategy
API	Abraham Path Initiative / Application Programming Interface
THR	Trans Himalayan Jeep Rally
GoP	Government of Pakistan
TELCO	Telephone Company
PUM	Programma Uitzending Managers
DMO	Destination Management Organization
4TMP	Fourth Tourism Master Plan
PKR	Pakistani Rupee
WSFP	Winter Sports Federation of Pakistan
MICE	Meetings, Incentives, Conference, and Events



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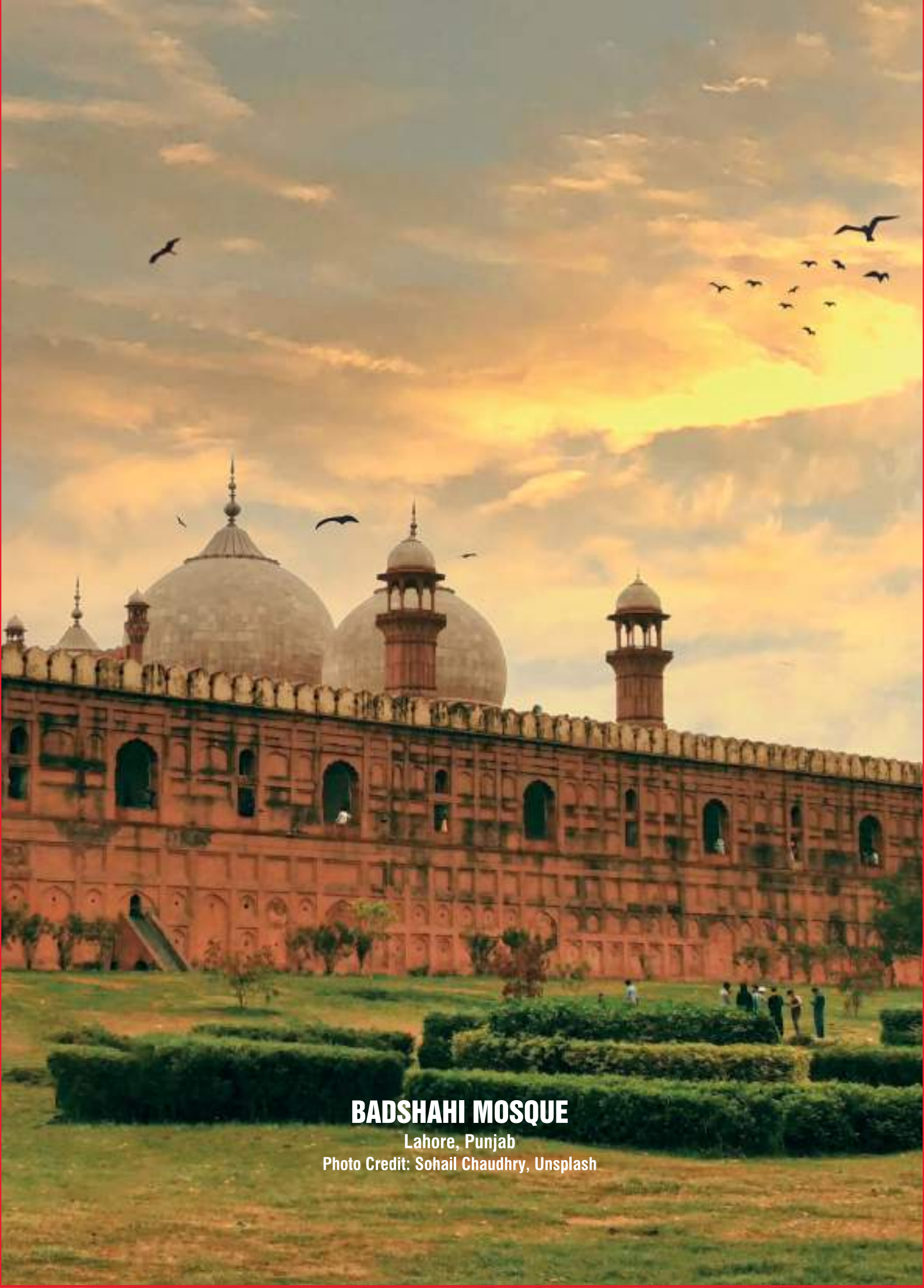
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BADSHAHI MOSQUE

Lahore, Punjab

Photo Credit: Sohail Chaudhry, Unsplash



CORPORATE PARTNERS

We are very grateful to the following esteemed organizations for partnering with us in this important mission to build the tourism and hospitality sector for a prosperous and industrialized Pakistan.



Pakistan is indeed a land of opportunities and when it comes to tourism, the Country has so much to offer to the world. Our country is rich with nature's gifted beauty having high mountains, serene beaches, beautiful valleys, rivers and lush green meadows; from the world's deepest sea port, Pakistan is home to one of the highest mountain ranges in the world.

With the prevalence of COVID-19 pandemic, the tourism industry was amongst the ones that were the most affected owing to the travel bans. Promoting this sector will not only improve the image of Pakistan but also translate into economic returns, helping the country to boost its GDP. With the phenomenal serenity that the country has to offer, I am sure that in times to come more and more local as well as international travellers will have Pakistan as their destination of choice when tourism is considered.

PARCO truly appreciate and support tourism as it provides an opportunity to showcase culture, people, and our immense economic potential. As the publishing partner, I am pleased with the remarkable efforts demonstrated by the Employers' Federation of Pakistan (EFP) in compiling this commendable document. We, at PARCO, through our Values, believe in uplifting Pakistan which motivates us to support organizations like EFP that work for the betterment, upgradation and promotion of the things best offered to the world by our Country.

It is our time to amaze the world.

Shahid Mahmood Khan
Managing Director
PARCO



Pakistan has a great opportunity at hand to make the most of its natural beauty and the rich cultural heritage of the world's oldest civilizations. While the domestic tourism industry has seen growth in recent years, there is more that can be done to improve the existing infrastructure for the provision of better facilities. It can result in foreigners opting to come and visit Pakistan for the sole purpose of tourism, thereby improving the socioeconomic conditions of the country. This initiative serves as a great milestone towards spreading global awareness about the scenic diversity, along with the traditional hospitality and cuisines of Pakistan to build a softer image.

Saadia Naveed
Deputy Managing Director
EBM



I hope this benchmark document on Tourism and Hospitality Industry of Pakistan would surely serve as an investment guide for the investors and stake holders enabling domestic tourism as a key driver of economic growth in Pakistan.

Barrister Mansoor Shah
Senior Vice Chairman
Pakistan Hotels Association



Also serving as: Advisor to the Board of Samsons Group of Companies. A Pakistani FMCG and Tourism Multinational and owners and operators Samsons Inn Hotel Malam Jabba.



This document on Pakistan Tourism will aid in tapping the potential of domestic tourism and hospitality industry in Pakistan, while also bringing in foreign exchange and enhancing economic activity.

Aqeel Karim Dhedhi
Chairman
AKD Group



DHA Quetta has taken an initiative to maintain the remarkable position and standard for the tourist of different places and its positive effects are to support the tourist background of Quetta city. DHA Quetta sends message to the world that Balochistan has best tourist attractions and DHA Quetta is taking all possible steps to promote its tourism.

Lt Col Kamran Saleem
Director Sales, MKT & JV
DHA Quetta





As per UN study tourism is one the largest foreign exchange earners of a country. For every Dollar spent on a hotel there are four Dollars spent on allied facilities and services. Like investment, tourism can evaporate from a country if the needs of tourists are not met. From the Arabian Sea to the peaks of K2 there are unbelievable opportunities which shy because of security and changes in rules as well as the need for bureaucratic approvals. These need to be attended to for tourism to flourish in Pakistan.

Byram D. Avari
Chairman
Avari Hotels Ltd



DULY SUPPORTED BY

We are very grateful to the following esteemed corporations and non-profit institutes for their due review and endorsements of our work!



ACKNOWLEDGEMENT FOR SUPPORT



“We would like to earnestly thank the Gallup Pakistan for assisting us in collecting results for our premiere 2020-21 National Travel and Tourism Survey, as well as in providing pro-bono desktop support in extracting key trends from the results.”



KHUNJERAB PASS

Pak- China Border, Gilgit Baltistan
Photo Credit: Rizwan Saeed, Unsplash



MESSAGE FROM PRESIDENT



It is a little-known fact that when Pakistan got independence in August 1947, we inherited only 4 percent of the industries of the subcontinent. Over time and with great fortitude, we then entered the Golden Era of industrial growth of the 1960s, and this is exactly where we must continue from, and tourism can be our guiding light.

We are fortunate to have destinations that naturally present themselves as entrepreneurial hotspots. The ancient heritage sites, tall mountains, abandoned deserts, historic passes, and the 1000 km long coastal belt carry outstanding economic prospects. Investors have abundant options from restaurants and hotels to recreational, sightseeing, and cultural events that can serve as a sustainable source of revenue for both the local communities and the Government.

COVID-19 may have marred the general purchasing power, but the middle-class continues to expand and allocate ever increasing household budgets toward travel and tourism.

We at the EFP realize these excellent possibilities and are working assiduously to not only address the key challenges of the tourism and hospitality sector but are also continuously advocating for the promulgation of a comprehensive, and unanimously approved National Tourism Policy of Pakistan, In Shah Allah.

Our document shall serve as a benchmark reference for our next edition, which will feature comprehensive investment feasibilities of the locations highlighted, as well as seek to materialize the ideas, concepts, and solutions presented in it.

Long Live Pakistan!

Ismail Suttar

Also serving as:
Chief Executive Officer,
Hub Salt



ACKNOWLEDGEMENTS



“ A global hospitality consultant and a certified Food & Beverage Executive (CBFE) with over 30 years of senior leadership and hotel management experience with Marriott International & Hyatt Hotels. Asim has a proven track record of building best-in-class hospitality organizations which consistently deliver exceptional ROI for stakeholders. ”

“I owe my sincerest gratitude to Mr. Abdullah Ali Khan, for leading this benchmark document, Employers’ Federation of Pakistan, and the Gallup Pakistan for assisting in the successful execution of our 2020 Travel and Tourism Survey.

Also Mr. Aftab Ur Rehman Rana, Mr. Abdul Samad Khan, Ms. Sana Hussain, and Ms. Shafaq Pirani, for their valuable contributions.

My firm conviction is by enabling domestic tourism as a key driver of economic growth in Pakistan, several remote and impoverished communities can be added to the supply chains of hotels that will solve many of the problems connected to poverty and unemployment in Pakistan.

Pakistan is blessed with incredibly diverse landscapes from snow-covered mountains to desserts and incredible natural beaches. Let us protect, sustain, and secure it!

We wish to achieve results that supplement service excellence for both domestic and international travelers and maximize healthy returns for all parties, through original ideas and their practical implementation.

We hope that this document provides motivation and encourages public and private sector stakeholders to prioritize tourism and hospitality.”

Asim H. Ibrahim
Senior Vice President,
Hashoo Hotels



CONTRIBUTION TO TOURISM AND HOSPITALITY



We are very happy that, through the initiative of the Employers' Federation in Pakistan, we will be able to support from an International perspective on this Tourism and Hospitality initiative in Pakistan now and in the future.

We think our international knowledge of the Tourism and Hospitality market will contribute to this initiative of the EFP and will result in a long-term cooperation in support and knowledge sharing for the whole Industry.

World Projects offers in-depth knowledge sharing and hands-on support for Tourism and Hospitality companies and organizations in developing countries and emerging markets. General and in education.

We believe that boosting the Tourism and Hospitality Industry starts with offering the best education, assessing organizations, initiatives and hotels to help improve and strengthen their position in the market.

The initiative shown in this document is one at the base of improving the whole industry.

It shows that the National overview and will to improve, is seen as an important step and will strengthen the position of all involved.
It will benefit directly.

We hope that our long-term commitment to support and will to contribute, will do so accordingly.

Marten Jansen

Chairman
World Projects
Netherlands



www.worldprojects.nl



PREFACE



2.8% GDP

Average annual GDP contribution of Domestic Tourism Sector is US\$9.5 billion (WTTC, 2020)

61.6 Million

Total Employment in Tourism Sector (PBS, 2018)

US\$3.0 Billion

Total Investment in 2018 and expected to grow to 7.4% of GGP by 2028 (WTTC, 2020)

46% Households

Reserve Rs. 8000 Budget per day for Traveling, Lodging, Food and Activities (T&T Survey, 2020)

62% Travelers

Feel that traveling inside Pakistan is worth the money (EFP T&T Survey, 2020)

This benchmark document provides a strategic overview of the current tourism landscape of Pakistan. It shall serve the purpose of a grander effort of enhancing the industry's global competitiveness by identifying, scrutinizing, and accelerating efforts toward the resolution of key issues. The findings will support and validate many aspects of Pakistan's tourism environment, as well as its investment potential and growth challenges.

During the past year, many tourism conferences, summits, and dialogues have taken place across Pakistan, but there has not been any significant progress. Due to this reason, the sector remains deprived of technological innovations, updated databases, and accreditations.

The average per annum GDP contribution of tourism in Pakistan still hovers around less than 3 percent - far below its true potential despite nature's finest gifts and an excellent geographical location of Pakistan in South Asia.

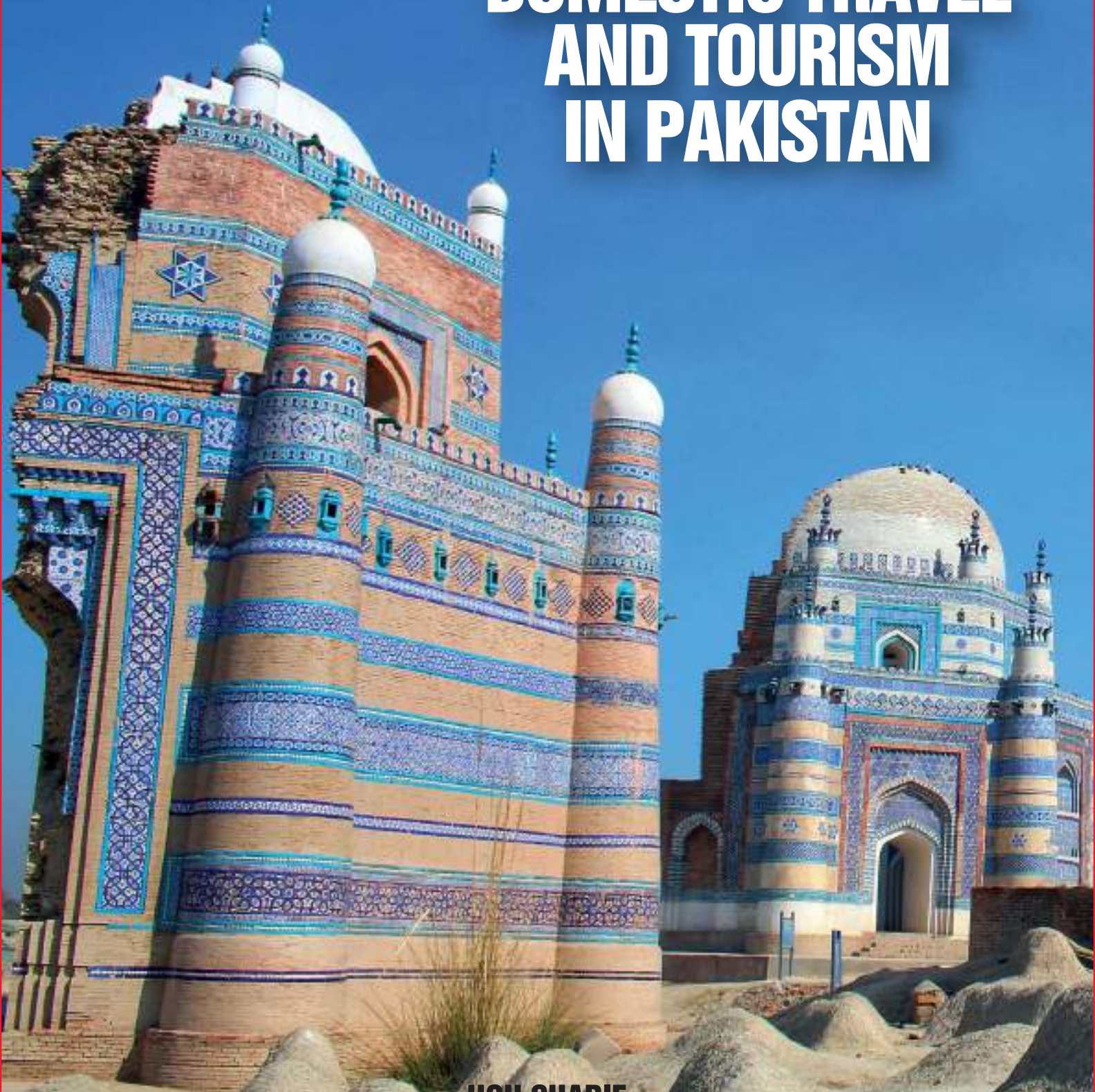
The best international practices, thought-provoking ideas, and locational mapping of hotels, rooms, and new places presented in this comprehensive version will help guide both citizens and investors in accurately capturing the tourism landscape and business potential of our motherland.

We are also grateful to GALLUP Pakistan for extending support in getting our 'Travel & Tourism' T&T Survey across, and to all the dignitaries who earnestly pitched in their valuable contributions.

Abdullah Ali Khan

Coordinator,
Economic Council.
Employers' Federation of Pakistan

EXPLORING THE POTENTIAL OF
**DOMESTIC TRAVEL
AND TOURISM
IN PAKISTAN**



UCH SHARIF

Bhawalpur, Punjab

Photo Credit: Ali Kazim, Unsplash

EXECUTIVE SUMMARY



In the wake of COVID-19 disruptions of global supply chains, Asian Development Bank has forecasted a -0.4 GDP growth for Pakistan in FY21, but the Government smartly timed the rampant lockdown, which guaranteed resumption of tourism in its peak season in Jun-Jul. In a bid to support middle-class households who made up 38 percent of respondents in the EFP-GALLUP Travel and Tourism T&T Survey, the Government announced big relief programs but high inflation largely restricted travelers to mobilize into nearby destinations. It is important to note that in order to boost domestic tourism activities, the ballooning working class should be appeased. Ordinary citizens, often always end up choosing popular locations for vacations like Murree, Nathia Gali, Islamabad, Lahore, Naran.

KHANPUR DAM

Khyber Pakhtunkhwa

Photo Credit: Adeel Shabbir, Unsplash



However, what escapes their radar are those other places that offer even richer cultural, historic, and natural attractions like Deosai Plains up in the north. These destinations present wonderful opportunities for camping and trekking, to take travelers far away from the hustle and bustle of city life.

Events such as the Markhor, Hispar La Trek in the Baltoro region, and Snow and Ice Marathons in Malam Jabba, have for years been creating life-long memories for locals. Whereas, the average domestic tourist, nevertheless, remains largely uninformed of these, otherwise, wonderful breaks of thrill and joy.

The T&T Survey disclosed that most people travel twice a year, which makes it all the more important for Government to ensure they return for another round next season. Most of these domestic tourists prefer to stay at 2-Star hotels that make up 52 percent of all hotels in Pakistan, and expressed that hygiene, warm blanket, and good food are the main factors that influence their stopovers. Regretfully, most 2-Star hotels in Pakistan are overpriced and offer subpar hospitality service as compared to international hotels of similar star-ratings.

There is a need for strong public-private partnerships to plug the bloated demand-supply gap of many years of negligence and to create accessibility for all stakeholders of tourism and tourism-allied industries.

Locations carrying excellent prospects for investment and local income generation, do not have proper roads or rail networks. The private sector should work with the Government to modernize the PTDC website to make it layman-friendly, as well as arrange capacity training programs for hoteling staff on the many customer-satisfaction intricacies.

One good way of developing distinct destinations is to hire world-class Destination Management Organizations (DMOs). These DMOs have an independent board and can play a pivotal role in materializing some of the best international models shared in this document, which will in turn allow for greater integration of local communities into supply chains of hotels and restaurants. The DMOs generally function to monitor and upgrade the outlook of these select places to boost visits and overnight stays. This will, in due course, add greatly to the existing employment level of each region.

Ideas like eco-lodges, city-to-city tourism research hubs, tourist centers, and bamboo tourism have been successfully adopted by many other developing countries, like China and Viet Nam, where the domestic tourism industry is contributing well to the national treasury.

The incumbent Government has prioritized lined up several big gun tourism initiatives in the pipeline like the Gandhara Heritage Trail and Trans-Himalayan Jeep Rally, to enhance the traveling experience. For any adventure lover, such trail-blazing experiences that offer a chance to drift and climb thousands of feet into the skies through metaled roads is a dream come true. It is without a shadow of a doubt that these spectacular and premium projects will also attract attention of international enthusiasts, provided the right policies are adopted.

In essence, Pakistan needs to be rebranded to the locals. The steady construction of new intra-city transportation networks, tunnels, and other infrastructure under CPEC, need to be translated into mobilization of investors and the middle-income domestic households. If domestic tourism picks up, so will industrialization.



SWAT-ISLAMABAD MOTORWAY

Photo Credit: Jalal Ajmal, Unsplash



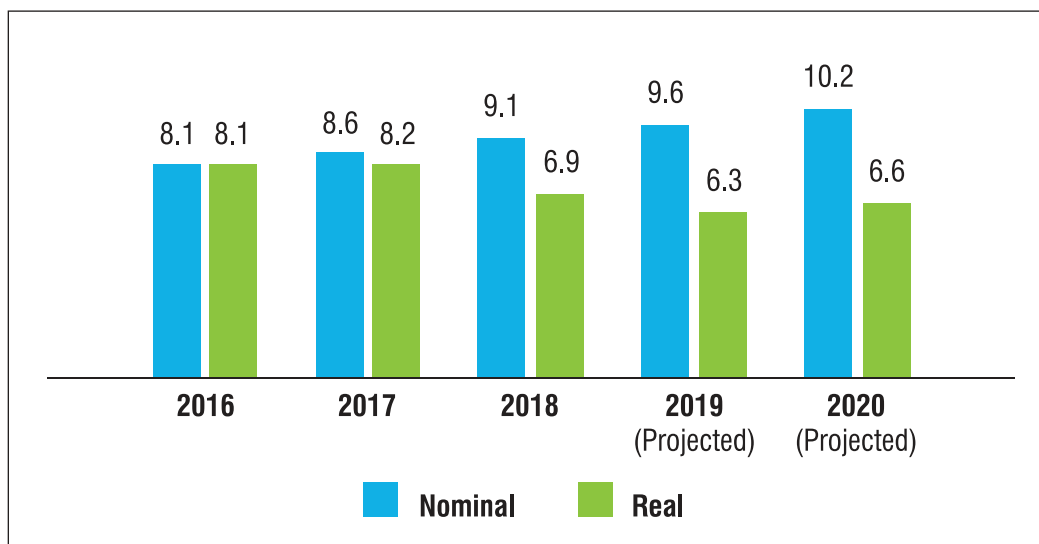
ECONOMIC OUTLOOK

Globally, 71.3 percent of the expenditure on traveling emanates from domestic sources (WTTC, 2020). The WTTC report also states that until the COVID-19, GDP growth of travel and tourism stood at 40 percent versus global GDP growth – a record ninth consecutive time in a decade. Domestic tourism is considered the dynamic engine of employment generation in countries like Thailand and Turkey, and hence can prove itself as a key source of revenue generation needed to upgrade existing basic infrastructure, such as roads, bridges, and railway networks. For the case of Pakistan, tourism contributes only a marginal 2.8 percent toward GDP or US\$9.2 billion per annum and 99 percent comes from domestic leisure tourism.

The bar chart above is prepared using 2018 WTTC data on the travel and tourism

industry of Pakistan. It shows that when the forecasted nominal revenue is projected in real terms, the effect of a ‘depreciated PKR’ becomes prominent: in 2018, the average weighted annual exchange rate of USD to PKR was 137 and in FY2019-20, 155 as recorded by SBP. Regardless, as compared to the 6.6 percent South Asian T&T GDP Growth (WTTC, 2020), in 2018, Pakistan maintained 5.2 percent.

However, in 2020 when the Novel Corona Virus was clipping off the fiscal powers of governments the world over amid mushrooming national health expenditure and critically low tax collections¹, the Pakistani economy managed to remain afloat due to the well-timed lockdowns² and generous social security programs like the Rs. 1.2 trillion Relief Package backed by business-friendly schemes.



Graph 1: T&D GDP Contribution in US\$ bn, WTTC

¹ With global GDP contracting by 5.2 percent, according to World Bank, and foreign direct investments from advanced countries disappearing, corporations faced record liquidity shortage that severely impacted labor market.

² The World Economic Forum has marked 25th November to Commemorate Success of Pakistan in containing COVID-19.

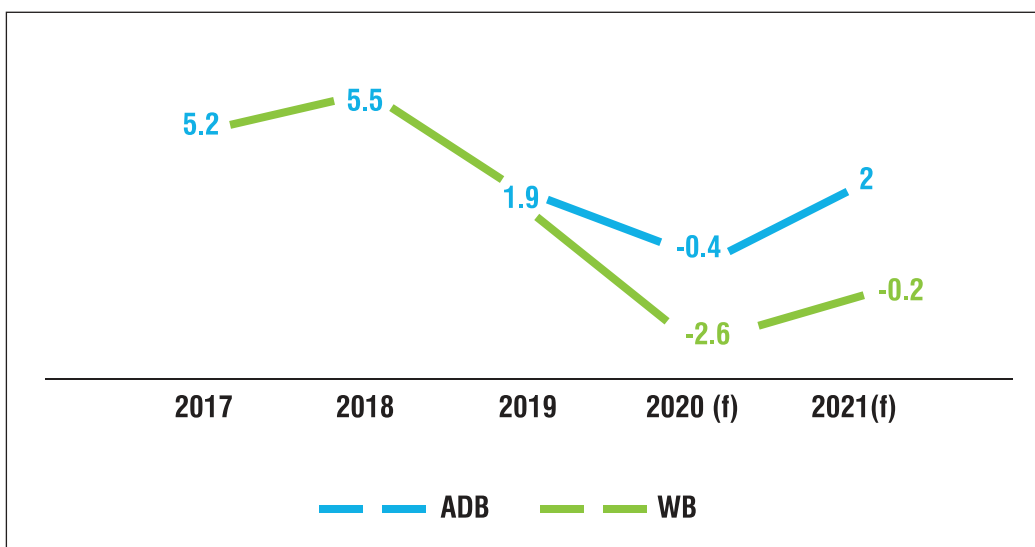


In the graph below, irrespective of the disarray in figures of ADB and WBG, both leading global institutions have projected a smooth recovery trajectory for Pakistan in the second half of FY 2020-21, which indeed happened as businesses resumed and Pakistan recorded record high remittances in its history of US\$ 29.4 billion (Business Recorder, 2021). This comes at a time when the Government has prioritized resolving the longstanding energy crisis³, which is key to a swift recovery.

It is this energy crisis and the costly payments on imported fuel that have soared our public debt to nearly Rs. 44.8 trillion (SBP, 2020). In 2018 the unemployment rate in Pakistan was

recorded at 5.8 percent (PBS, 2018) and with an average wage of Rs. 20,500 if the fourth wave of Delta COVID-19 Virus continues to pound hard then it might result in job losses of at least 12 million Pakistanis and compel the Government to inject US\$ 1.2 billion every month in the form of grants to keep households secured.

Although the economy has shown signs of recovery on the backbone of higher exports, higher remittances, and greater LSM momentum (SBP, Q3 2021), this fourth wave and rising political ties with Afghanistan and India, could damage this positive thrust and deter investor confidence.



Graph 2: Projected GDP Growth, ADB and WB

³ In June 2020 the circular debt recorded at Rs. 2 trillion. This was largely a result of excess payments to IPPs in dollar terms (Business Recorder, 2020).



TOMB OF SHAH RUKN-E-ALAM

Multan, Punjab

Photo Credit: Unsplash



SATRANGI LAKE

Naltar Valley, Gilgit Baltistan

Photo Credit: Mariyam Sadiq





ECOSYSTEM ANALYSIS OF GLOBAL HOSPITALITY INDUSTRY

There are many countries in the world, such as Maldives, Bahamas, Macau, and the UAE, where tourism is the single-most important driver of jobs creation and economic development. However, in recent times, there has not been any event that has caused so much catastrophe in all parts of the world, especially the hospitality industry, in one time as much as COVID-19 has.

When this virus hit the world, the countries mentioned in the previous paragraph were one of the first to initiate travel bans. Their governments sealed off borders, which immediately resulted in the decline of tourism-related activities. The tourism and hospitality industry of the UAE, for example, is usually perceived as stable and growing but the novel virus proved to be a huge bump on their road to success. The global trading ports of the Gulf, located in different cities, for example, Zayed Port, Mina Rashid Port, Jabel Ali Port, Fujairah Port, and Khalifa Port, add critical foreign exchange to the Government's reserves. In 2020, the Dubai Mall, where global showbiz stars and the affluent usually shop, recorded a dip of two-third in its annual revenue that usually hovers around US\$ 600,000 (Alarabiya News, 2021).

Maldives and Macau, where shocks of financial stress had eroded the only source of income generation [through tourism], came up with innovative solutions to keep the hotel occupancy rate from sliding hard. The World Bank Group launched a US\$ 12.8 million COVID-19 Emergency Income Support Program in Maldives (WBG, 2020) that enabled the frictionally unemployed

18,500 workers to earn a monthly stipend of US\$323, in a country where tourism is considered 'luxury'. Basic sanitation measures were widely adopted by hotel chains, short-term rentals, and resorts, and other firms operating near [or in] the usual water villas, underwater adventure parks, artificial beaches, casinos, ancient heritage sites, etc. One interesting strategy adopted by a Seaside Finolhu Hotel Chain was to open a Hotel Bubble Beach, where guests were accommodated in private bubbles that came with one chef and one butler.

The Government of Maldives made the Polymerase chain reaction (PCR) test compulsory for all travelers early on, and today that island is a 100 percent virus-free zone, where people are often spotted roaming freely without masks. The Government went as far as allowing citizens of the Gulf, who had tested negative to the PCR test, to visit the Maldives without the worry of having to pay for the lavish offerings of the Ayada Island (The National, 2020). Several travel enthusiasts shared their experiences on Instagram, which helped instill confidence in international audiences.

Numerous countries mustered the courage to coin new and creative propositions to safeguard the interests of tourists. For example, in Acqualina Resort, Florida, USA, keyless entries to rooms and contact-less check-ins became commonplace (Acqualina Resort, 2020). All guests were provided the option to pre-book housekeeping and even Work-From-Hotel packages that kept the hoteling business going. Customers were offered poolside workstations and

discounted access to private tutors. For US citizens, staycations emerged as a budget-friendly alternative to taking work outside of homes.

In developing places like Pakistan that harbor one of the world's most scenic landscapes, the post-lockdown pandemic period has proven beneficial to entrepreneurial setups and small businesses. SastaTicket, GoGhoom, Roomy, and TripKar are great examples of startups that managed to flourish considerably well in the post-lockdown period – digitally booking tickets, and helping people identify the cheapest and safest lodgings in their desired locations. Local restaurants were swift in adopting precautions like banning indoor seating, sanitizing the place, decreasing indoor ventilation, and installing thermal scanners to detect temperatures.

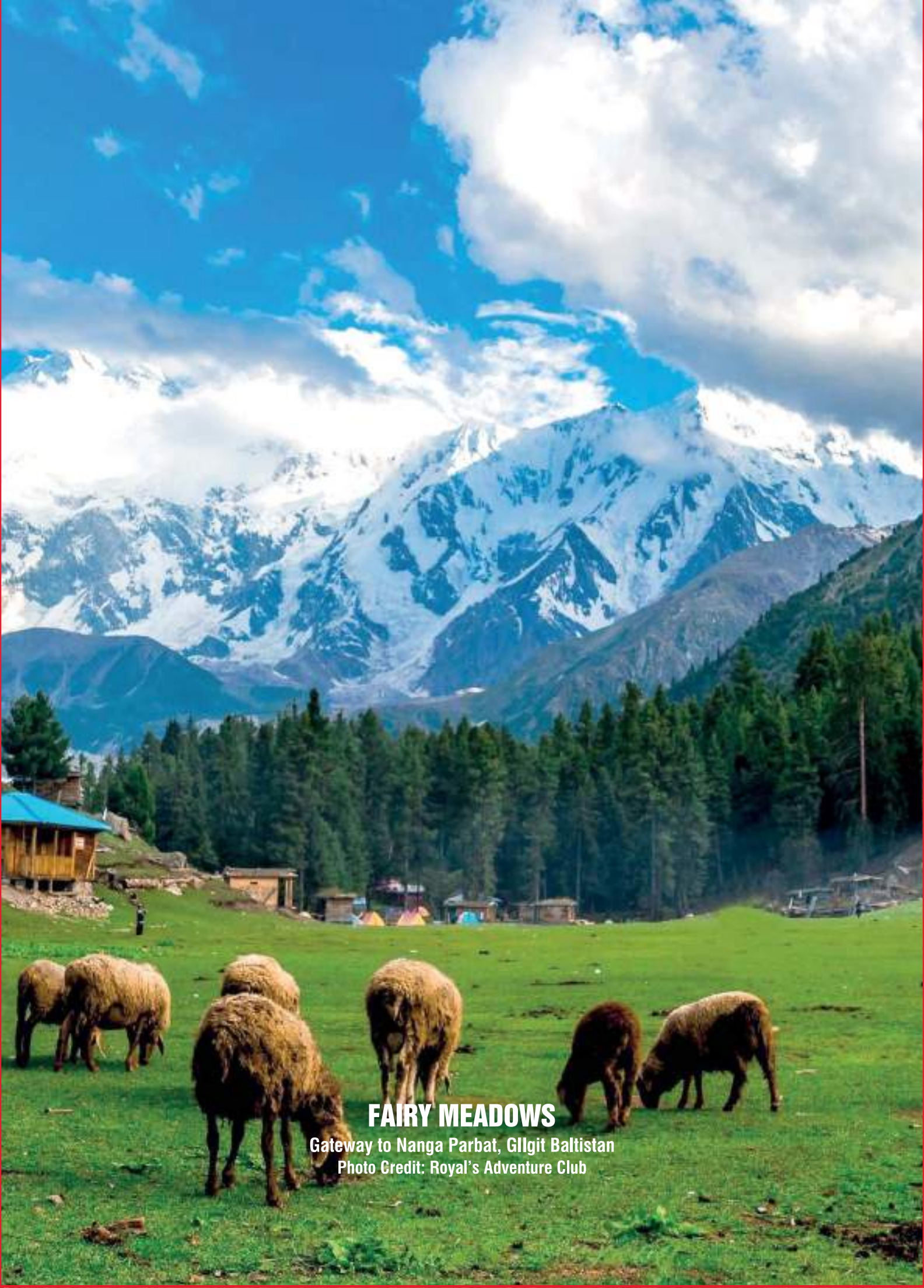
With time and consistent trials, various hospitality industries today have come up with interesting features, such as digital assistants, Quick Response (QR) codes, in-room fitness, and work vacations. Digital assistants like Alexa and Siri have risen to prominence during the COVID times as ideal tools in limiting physical interaction between customers and staff. If you want room service, or have any queries, talking to your designated digital assistant is not only a fast way of getting your issues addressed but it has also made things easier for the hotel staff. Many restaurants in Pakistan and around the world, have started to use QR codes through which accessing menus, placing orders, and even paying bills is a click away.

Another exciting feature the hospitality industry introduced relates to in-room fitness. In times like these, no one is willing to risk their lives by going to gyms, where making contact is fast by bumping into other persons and using infected bathrobes, towels, and gym equipment. This is reason why in-room fitness idea lifted off nicely.



HILTON

In-room Wattbike, Hilton McClean
Photo Credit: Stephanie Kanowitz



FAIRY MEADOWS

Gateway to Nanga Parbat, Gilgit Baltistan
Photo Credit: Royal's Adventure Club



T&T SURVEY FINDINGS

PURPOSE

2020 Travel & Tourism T&T Survey primarily aimed to capture consumer preference domestic tourists who lead 99 percent of the tourism activities in Pakistan. Other areas of immediate focus were the observance of hospitality standards, identification of profitable tourist destinations, and the challenges faced by local stakeholders.

It is, by and large, understood that generally, what truly drives seasonality is the rise in purchasing power of the middle-class. The higher the dispersity in new or less popular regions, the better the chances of remote communities getting integrated into the supply chains of hospitality businesses. A good lesson can be drawn from China, back in 2004, which had similar GDP per capita to that of Pakistan of today: US\$1500 (World Bank, 2020). Today, China has a GDP per capita of US\$11,200 (World Bank, 2020) - a large part of which is a direct result of the heavy investment by the Chinese Government in developing air- and rail transports.

Studies, such as, ‘Economic Impact and Challenges in Travel, Tourism and Hospitality Industry’ (Sidharth Shankar Raju, 2019) reinforce the common belief that expansion of the middle-class and the incidence of tourism activities are indeed interlinked. With rising purchasing power parity, people are encouraged to allocate greater proportions of their household budget to explore new spots and in the consumption-fueled economy of Pakistan, this is a case proven time and again.

The findings of the 2020 Travel and Tourism T&T Survey will aid decision-makers to better understand the mindset of the general public and the later sections will attempt to create a path leading to a cogent national policy framework.

METHODOLOGY

The T&T Survey was bilingual (English and Urdu) and was widely circulated across Pakistan to achieve the maximum number of respondents required to generate authentic results.

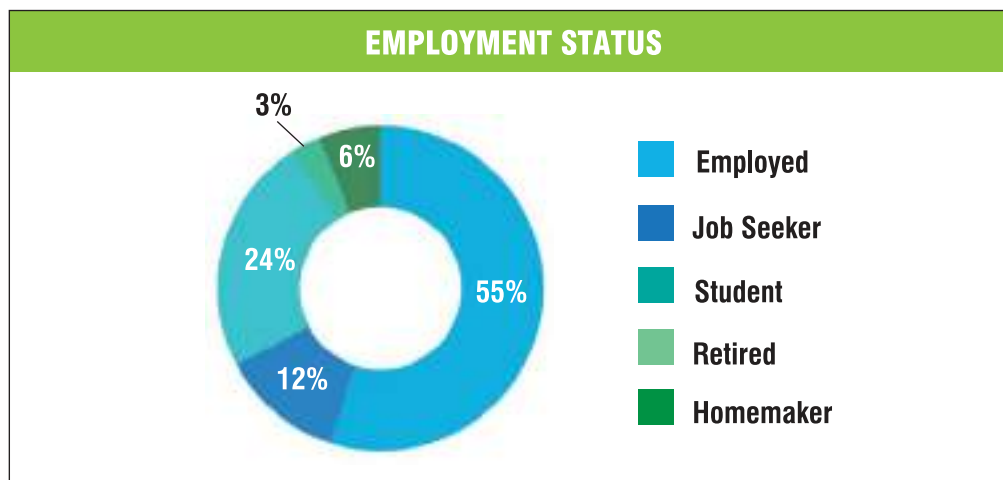


Figure 1: Employment Status of Respondents

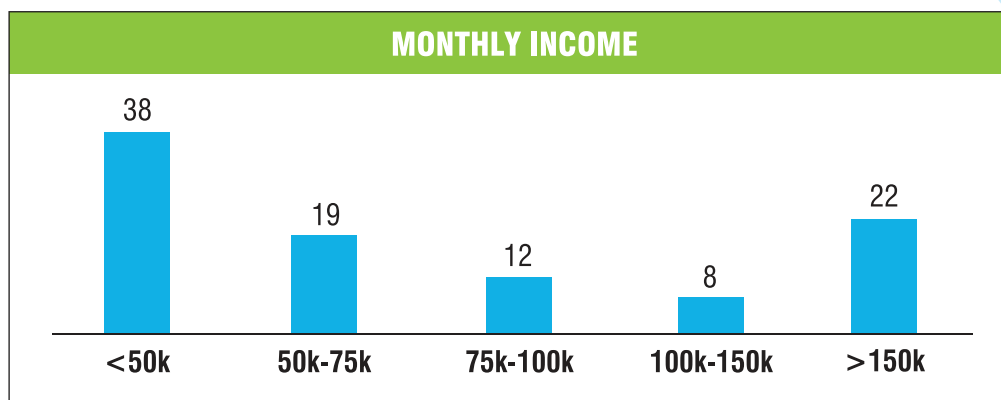


Figure 2: Monthly Income of Respondents, PKR 000'

The sample size covered was N=856 with 40 percent of respondents being native Urdu speaking. The T&T Survey was conducted both online and in-person with participants mainly comprising university students, housewives, and customers of travel operators.

Majority of the respondents belonged to middle-class families having monthly incomes less than Rs. 100,000. The respondents largely consisted of employed persons, followed by students who like to travel in groups, and solo travelers.

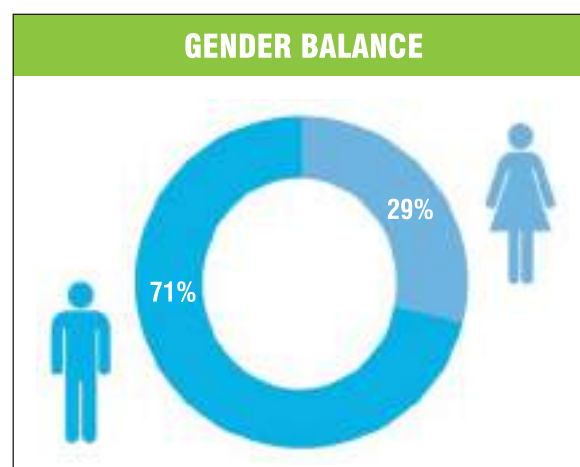
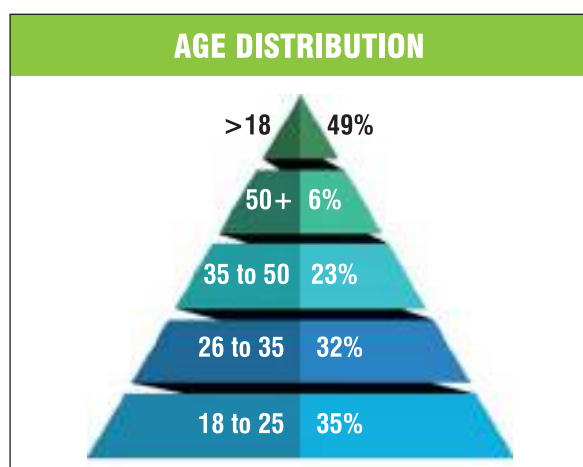


Figure 3: Demographics of Respondents

From the T&T Survey, we extracted the following information and trends among domestic travelers:

1. Demographics
2. Breakdown of budgeting for lodging, food, and entertainment using transport and non-transport costs
3. Identified popular and unpopular destinations
4. Earmarked locations for investment purposes
5. Hotels by star-rating and rental rates
6. Frequency of traveling, common size of groups, and general source for consultancy on itineraries
7. Most common modes of transport
8. Level of satisfaction with safety and standards of hospitality

Beyond the T&T Survey, the document highlights some of the best international practices of tourism and hospitality from around the world, as well as prospective areas where investment can be directed. The subsequent chapters also feature policy recommendations, challenges, eco-tourism, and an entire chapter dedicated to adventure enthusiasts.

TRAVEL PATTERNS

Majority of travelers are from Sindh and prefer to travel with family and friends at least twice a year. Total of seven places were identified, such that they accounted for 27 percent of all annual visits and these mostly featured the capital cities.

Only few respondents mentioned areas that were found to be unpopular, for example, Arang Kel in Azad Kashmir, Gorakh Hills in interior Sindh and Khaplu in Skardu district.

Whereas Balochistan and western areas of Waziristan remain most unpopular.

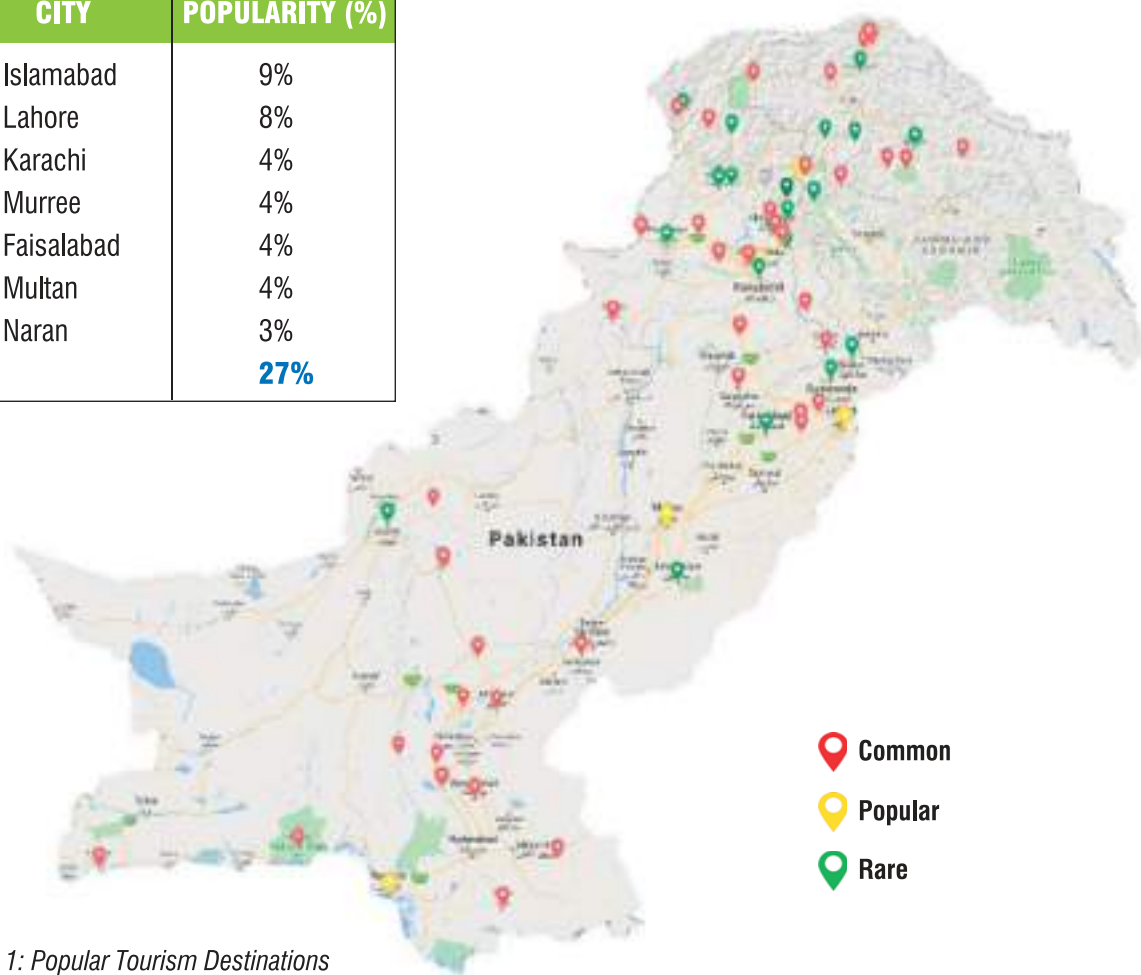
KUMRAT VALLEY

Upper Dir District, Khyber Pakhtunkhwa
Photo Credit: Ali Muhammad, Unsplash





CITY	POPULARITY (%)
Islamabad	9%
Lahore	8%
Karachi	4%
Murree	4%
Faisalabad	4%
Multan	4%
Naran	3%
	27%



Map 1: Popular Tourism Destinations



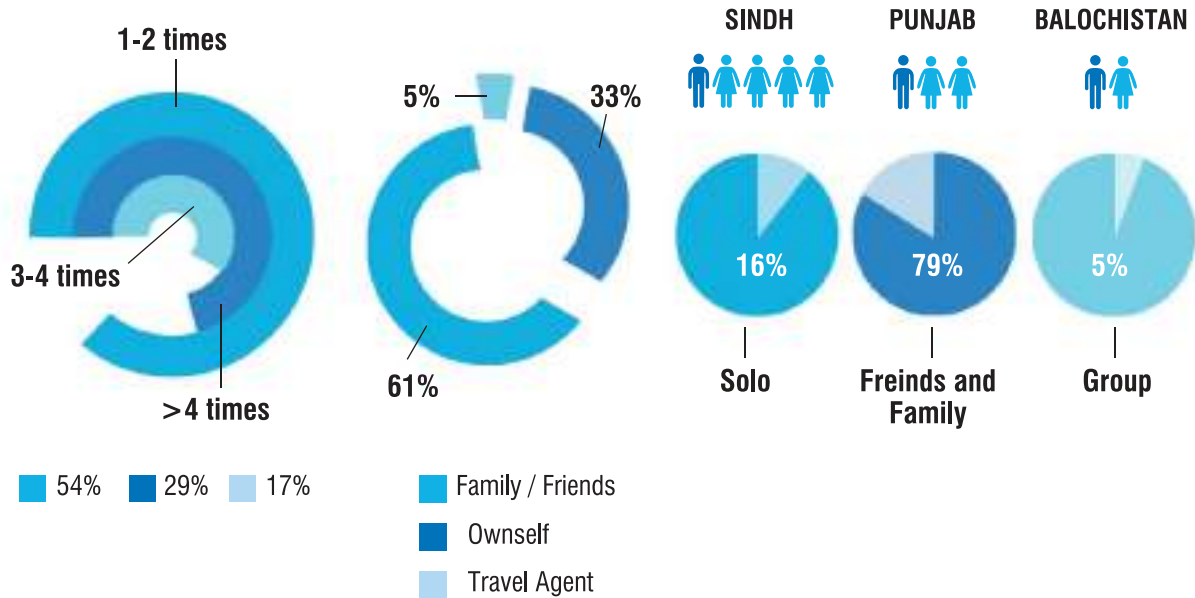
KARAKORAM

Gilgit Baltistan

Photo Credit: Feng Wei



ANNUAL DOMESTIC TRAVELING FREQUENCY IN PAKISTAN



CHEAPEST OPTION FOR TRAVELING?

According to results of the T&T Survey, it was generally noticed that people prefer to travel 1-2 times a year and mostly with family or friends.

38 percent of respondents were identified as full-time workers who were aged between 18 and 35. Most had a household income of Rs. 50,000 that can best afford a train or car.

It is also observed that generally, people preferred to travel during summers on a 5 to 7 days' break, with an average daily budget of Rs. 4,683 for managing lodging, food, and recreational activities.

Our calculations show that traveling via train is the cheapest option, and the middle class usually takes this option. Private cars are the second-best choice.

NON-TRANSPORT COST (per day)	MIDDLE
Lodging (4 persons in a 3-star hotel)	7,880
Food	869
Recreational	1,844
Total (per person)	4,683

AIRPLANE (per day)	30,000
TRAIN / BUS (per person)	13,500
CAR (4000 km/ 4 persons)	12,000 (for 5-7 days)

Figure 4: Budget breakups in Rupees, T&T Survey

On the contrary, for any average middle-class traveler wanting to enjoy to the fullest, it is less costly to make a 5–7-day itinerary that can easily be executed within the Rs. 30,000 to Rs. 50,000 range, using train or car.

MIDDLE-CLASS	3 DAYS	5 DAYS	7 DAYS
Airplane	44,049	53,415	62,781
Train/Bus	27,549	36,915	46,281
Car	26,049	35,415	44,781

Figure 5: Combined Budget Options in Rupees, T&T Survey

SHANGRILA

Skardu, Gilgit Baltistan
Photo Credit: Waqas Akhtar, Unsplash

Train/bus: Average price of last 5 years was calculated using estimates from Pakistan Railways. The price for middle and upper middle is set as economy and business classes, respectively.

Airplane: Average return ticket price for each profile was calculated using the average ticket price of last 5 years. The data was drawn from Pakistan International Airlines (PIA).

Private Car: The average distance for return journey per traveler was estimated at 4000 Km. The average mileage per 100 Km was set at 30 ltr without A/C and 50 ltr with air conditioner. The average price of gasoline was calculated using data of last 5 years from Pakistan State Oil.



HOW DIFFERENT TRANSPORT MODES CONSUME CARBON FOOTPRINT

Traveling for leisure should not only be enjoyable but also less of a burden on the economy and climate. The sleeper trains of China, and the bullet trains in Japan offer cheap transport along with an excellent view from the windows, which adds to the experience.

In Pakistan, although the railway system is not well developed and local coaches like Daewoo Express are still evolving, domestic flights remain the most popular option for long hauls. It should be noted that flying domestically burns the most fuel as compared to internationally - 254 grams per kilometer as per Figure 7. Pakistan has

one of the lowest per capita incomes in the world, and only under 3.2 million tax filers as per the FBR's Active Taxpayers' List (ATL) 2021. Hence, this mindset needs to be changed.

What is instead a more desirable option is to commute via trains, coaches, and cars (in groups) as this way, there is lesser 'per km' fuel consumption.

Long-haul flights, smaller cars, intercity coaches, and intra city trams not only cut down the opportunity cost of traveling but also play a bigger role in absorbing the toxic carbon dioxide.

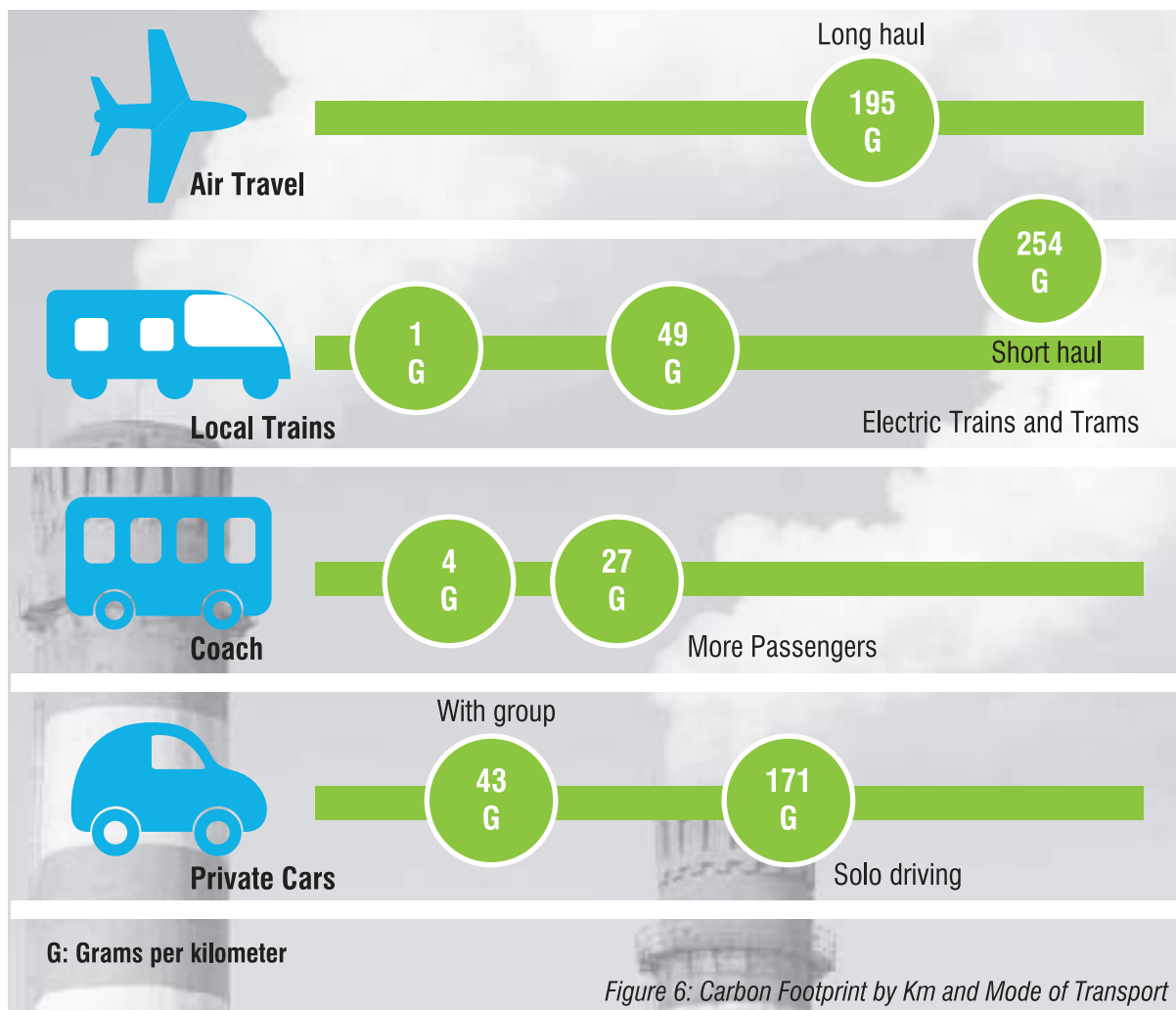
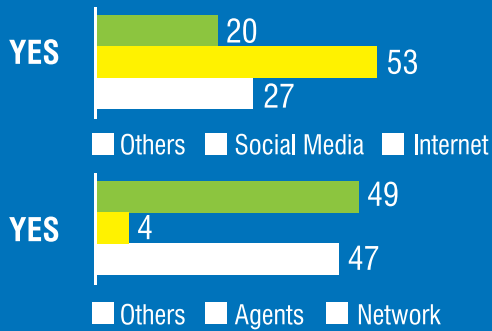


Figure 6: Carbon Footprint by Km and Mode of Transport

SEASONAL TRAVELING PATTERNS

■ Yes
■ No



Never used any tour guide to plan itinerary

Feel unsafe to travel within Pakistan

Highly unlikely to find desired information

Not confident at all on reliability of information

TRAVEL PLANNING PROCESS



■ Summers ■ Winters

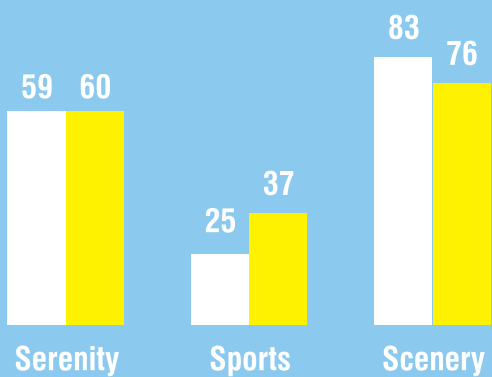


Figure 7: Seasonal Traveling Patterns



HOTEL DESCRIPTIVES

Based on the hotels mapped in the 2020 T&T Survey, the following estimates were extracted to drive decision-making:

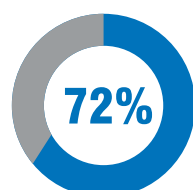
	NATIONAL DISTRIBUTION (%)	AVERAGE No.OF ROOMS	AVERAGE RATES (PKR)	
			NORMAL	PEAK
2 Stars	52	Less than 80	4,000	7,500
3 Stars	42	Less than 150	12,500	18,500
5 Stars	23	Less than 200	25,000	50,000+

Table 1: Distribution of Hotel Rooms in Pakistan

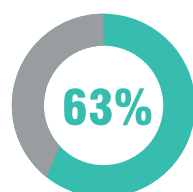
TOURISM	HOSPITALITY
<p>One of the oldest organized travel activities</p> <p>Seeks food, shelter, and companionship of the welcoming hosts (hospitality) in a place (hotel) to rest our weary souls</p> <p>Engages with customers for pleasure</p> <p>Destination is the focal point of the tourism industry, while hospitality is the delivery of services that takes the edge off the journey and retains traveler</p> <p>The tourism industry caters specifically to those coming to town and features local guides/tours, gift shops, hotels and resorts, visitor’s center and other services specifically for visiting tourists</p>	<p>One of the oldest organized industries</p> <p>It is the first business to cater to the needs of the customers and is created out of tourism demand. It was a business because guests would pay</p> <p>Delivery of services to fulfill the needs of a traveler</p> <p>The hospitality industry is a much broader term that includes all venues and destinations. Its services are related to – hotels, amusement parks, restaurants, pubs, and cafes</p> <p>The hospitality sector is a direct beneficiary of tourism include airlines, cruise ships, trains, taxi. Whereas, accommodation includes hotels, resorts, amusement parks, restaurants, shopping, and regional arts and crafts. This is in addition to goods bought by tourists like souvenirs</p>

Table 2: Comparative Study of Tourism and Hospitality

WHAT TRAVELERS FAVORED

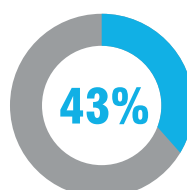


Good customer engagement promotes positive word of mouth and guarantees long-term prosperity of businesses

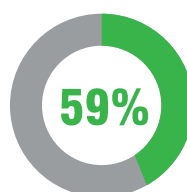


Fulfilling physiological needs, such as water, blackout drapes, warm blankets, etc. is first step in providing great hospitality service

WHAT TRAVELERS OPPOSED



Poor cleanliness and hygiene, such as dirty toilets and bed sheets affects a next time visit



Over-crowded hotels are bad for business as they restrict the choice for overnight stays that help create income for locals



BHONG MASJID

Rahim Yar Khan, Punjab
Photo Credit: Ayesha C, Unsplash



WHERE MOST HOTELS ARE LOCATED: T&T SURVEY

The T&T Survey identified eight 5-Star hotels across the country: Islamabad, Lahore, Bhurban (Murree), Malam Jabba and Muzaffarabad. The province distribution chart shows that the cluster of hotels is mostly concentrated in KPK, Northern Punjab and other adjacent areas where tourists mostly prefer to travel.

Islamabad and Lahore have the highest number of hotels and rooms, respectively.

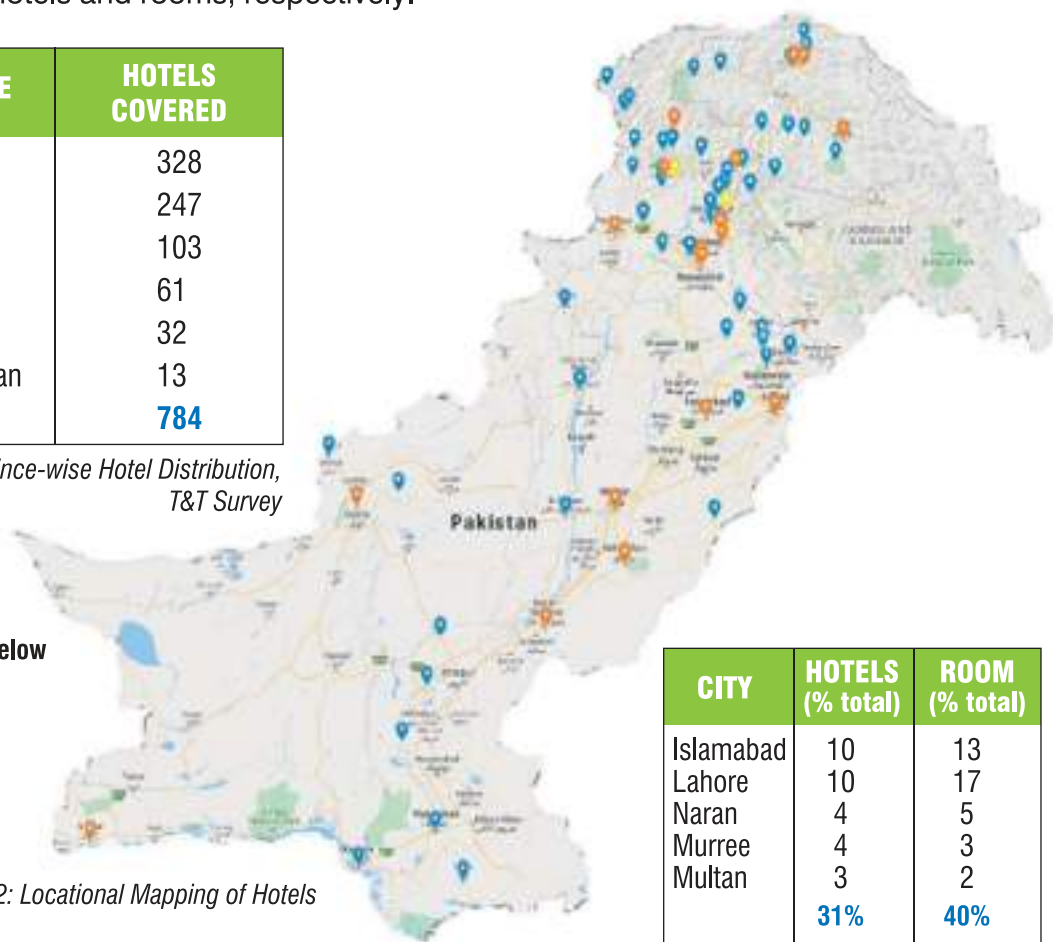
These two cities, as well as Naran, Murree and Multan, together represent 31% of total hotels covered, respectively. Rest is scattered in Lower Punjab, Karachi, Gawadar, Quetta, and surrounding areas.

It was also found that vast majority of travelers like to stay for one night but there are also those who like to stay for 5-7 days to enjoy the destination.

PROVINCE	HOTELS COVERED
Punjab	328
KPK	247
GB	103
Sindh	61
AJK	32
Balochistan	13
	784

Table 3: Province-wise Hotel Distribution, T&T Survey

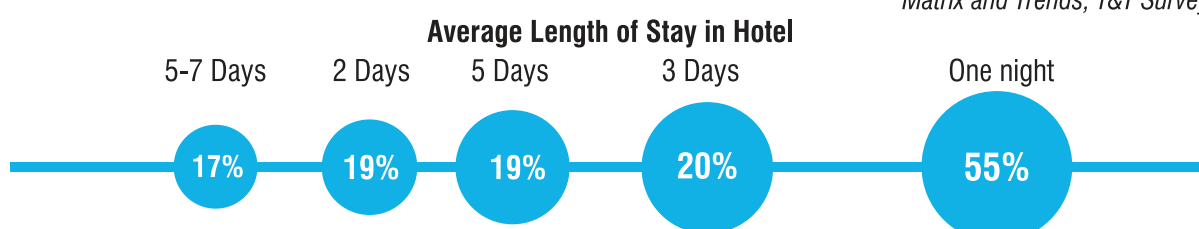
- 3 Star or below
- 4 Star
- 5 Star



Map 2: Locational Mapping of Hotels

CITY	HOTELS (% total)	ROOM (% total)
Islamabad	10	13
Lahore	10	17
Naran	4	5
Murree	4	3
Multan	3	2
	31%	40%

Table 4: Hotel Rating Descriptive Matrix and Trends, T&T Survey





HOW HOSPITALITY IN PAKISTANI HOTELS SHOULD BE

BY POPULARITY	2-STARS	3-STARS	5-STARS
THEME	Small, cozy, cheap, and decorative with 25% rooms having AC/heating. Only luggage pickup	Stylish, hearty and budget-friendly with 60-80% rooms have AC/heating including lounge. Valet, mail service and luggage pickup	Superior design fulfilling all features of 3 and 4 stars. 100% all rooms have AC/heating including the lobby. Valet, cafes, mail service, and luggage pickup
LITERACY (%)	20-25	30-35	80-90. Most have degrees
USUAL LOCATION	At proximity to towns and attractions at walking distance	Near airports, expressways, business hubs, etc.	Located in smartly strategized areas. Pearl Continental in Malam Jabba and BeJaan in Chitral are the only 5 Star built on mountain tops.
SPECIAL FEATURES	None or very limited	Swimming pool, restaurant, swimming pool, etc.	In-room safe, restaurants, secondary dining, gym, swimming pool, business center, spas, etc.
BATHROOM AVAILABILITY	Floor mats	Floor mats	Floor mats and walking wardrobes
BASIC AMENITIES	24-hour room service along with cabinets, clean linen, cable TV, shower, soap, blankets, pillows but no laundry, ironing, or mini-fridge	24-hour room service with laundry and ironing options along with mini fridge, cable TV, Wifi, wardrobe, clean linen, bathtub, soap, toiletries, blankets, etc.	All of 3 Stars plus 24-hour room service and fully functional kitchen with in-room ironing, shoe polishing service, slippers, hair dryer, 5-amp earthed electrical socket, tea or coffee making machine, mini refrigerator, etc.
BREAKFAST	Buffet usually	Bed and breakfast and option of buffet, gyms, parking	Bed and breakfast option of buffet, cafe, fitness center, parking space, tennis court, outdoor pool, etc.
ENTERTAINMENT	None as such	At least one restaurant. 4 Star hotels have meetings rooms and banquet halls	Banquets, meetings rooms, personalized space
GENERAL TREND	Backpackers and families with monthly household income of less than Rs.75,000. Best for short hauls	Top choice of domestic tourists belonging to the middle-class range including student groups	Serve business executives and wedding couples with monthly incomes of more than Rs. 100,000. Used for conferences and seminars
T&T SURVEY	52% are rated 1 and 2-star in Pakistan	38 percent are rated 3-Stars in Pakistan	21% hotels in Pakistan are represented by 4 and 5 Stars

Table 5: Categorization of Hotel-wise Star Rating. Source: TripAdvisor



HANNA LAKE

Urak Valley, Balochistan

Photo Credit: Mohammad Irfan Baloch, Unsplash



SEA VIEW BEACH

Karachi, Sindh

Photo Credit: Nimra Yamin, Unsplash



THE SPROUTING NEED FOR DESTINATION BRANDING

Pakistanis love to travel and for all kinds of reasons – to attend weddings, business meetings, honeymoons, to visit families during festivities, and the list goes on. The T&T Survey reveals that 79 percent of Pakistanis travel only once or twice a year and not more, which makes it more important to ensure a lasting experience that is rich in taste, adventure, and explorations. Notably, there are 74 spoken languages and 15 major ethnicities existing in Pakistan that have evolved through centuries of various historical events.

Pakistanis today are lucky that their ancestors have left behind a legacy that is graced by rich cultural heritage. Map 1 shows that most of the traveling is concentrated in the northern region and budget-wise, 2-star hotels are a top choice for the growing middle-class.

The challenge lies in transforming hotspot locations (as mentioned later in the sections) into attractive destinations for both consumers and businesses. In the section on ‘Best International Practices’, several initiatives are highlighted to initiate thinking about how important it is to integrate local communities into the suppl chains of big businesses. A few good factors to remember during the planning and implementation stages that talk about how best to engage and retain visitors are:

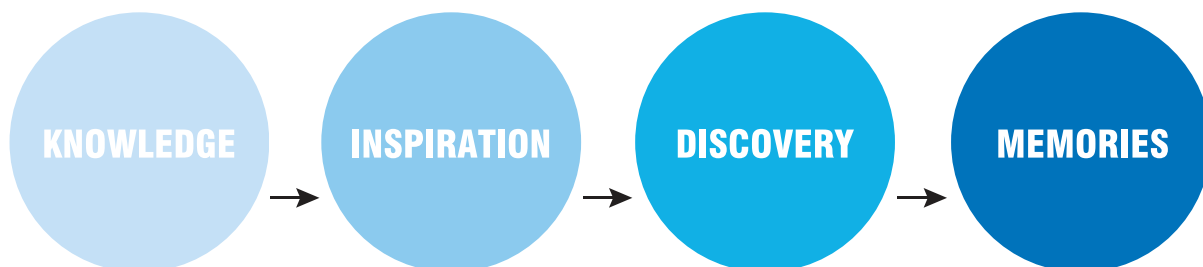


Figure 8: Factors Influencing Traveler's Retention

The factors stated above drive decision-making on part of travelers on the choice of destination. However, they are dependent on how fulfilling travel itineraries are in terms of destination features, accessibility, recreational opportunities, and the hospitality promised.

What knits these items together into a successful tourism product is a set of good travelers and destination management practices. If this is absent, then it would not matter if there were rainbow lakes, celestial events, or even natural wonders - travelers will divert elsewhere. They need toilets, a clean place to eat, 4G internet connectivity to share live moments, as well as tour guides to show them the way. This is where destination branding holds great value and need to be prioritized.

If tapped sensibly, tourism will be able to play its expected role in reducing poverty in the impoverished regions of Pakistan through income generation and in preserving the natural habitat that is degenerating fast.

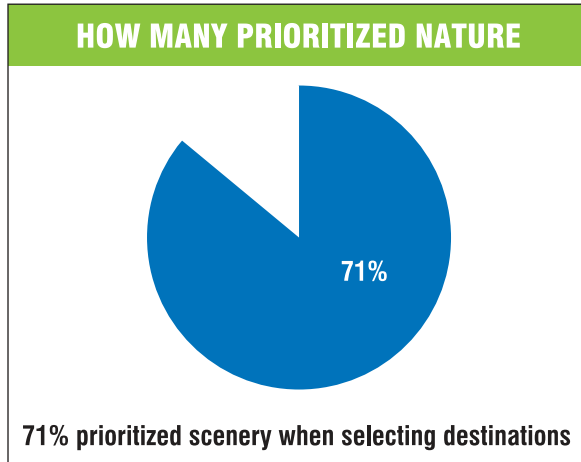
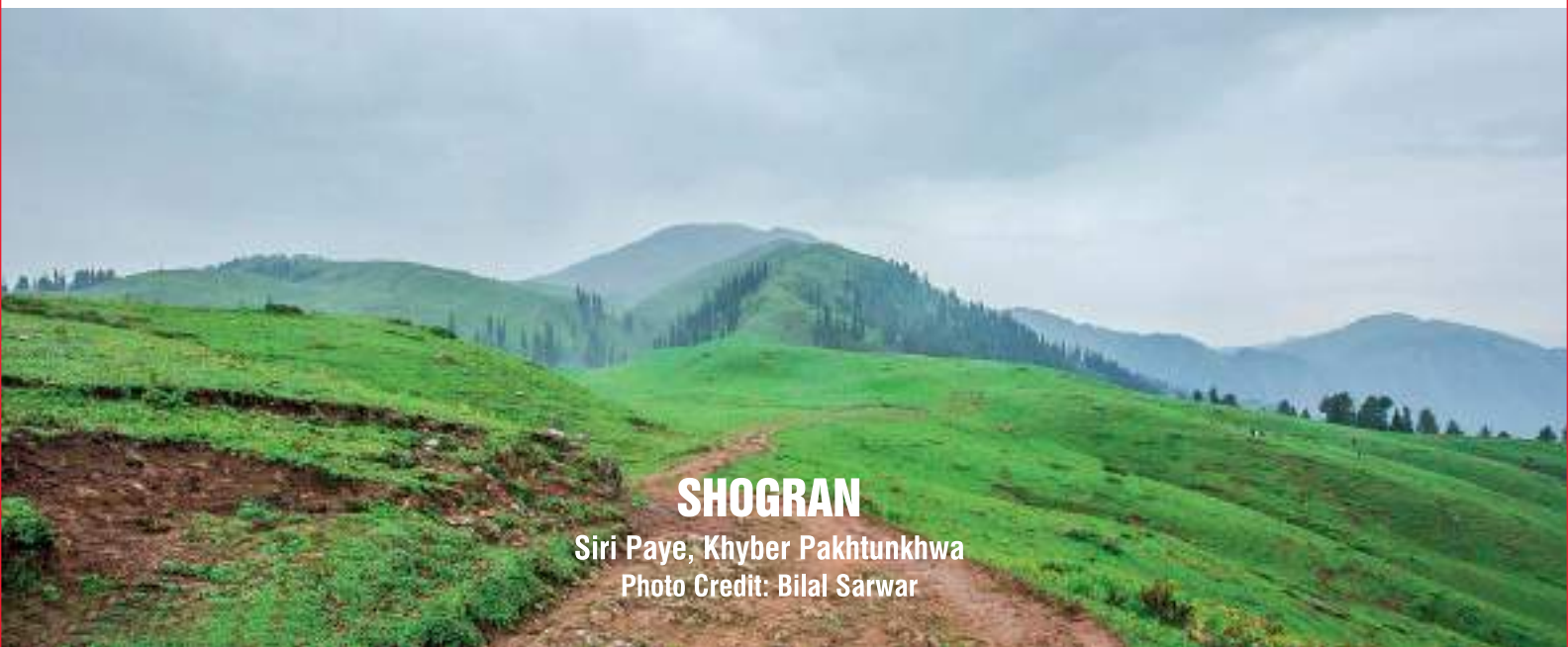


Figure 9: Respondents who Prioritized Nature, T&T Survey

Indeed, no one can deny the treasure trove of mountains, deserts, beaches, and valleys that define Pakistan – a still largely unexplored territory for adventure enthusiasts that holds a great many surprises for the world. From the magnificent peaks of the Karakoram to the fertile plains of the Indus River, Pakistan is home to a diversity of stunning landscapes. Ancient heritage sites like Mohenjo-Daro and historic passes like the Silk Road can enchant travelers of all seasons.

Since 71 percent of respondents chose ‘scenery and thrill’ as a priority while planning itineraries, we have presented the following section in such a way that it captures this premise in the form of prospective areas that are worthy of both visiting and investing. The section tries to create a sense of urgency in enhancing accessibility and revamping existing infrastructure as domestic traveling is on the rise in Pakistan. Greater accessibility will drive demand for entertainment and amenities

This should, in turn, rekindle allied industries and encourage job-creating entrepreneurial activities involving local communities.



SHOGRAN

Siri Paye, Khyber Pakhtunkhwa
Photo Credit: Bilal Sarwar

CITY OF ANCIENT RUINS

The Indus Valley Civilization is one of the oldest historic sites known to mankind and Pakistan is blessed to house this as a major tourist destination where archeologists and scientists from all over the world have had their share in ransacking the ruins to draw a vision of how life used to be back in 7000 BC.

It is remarkable to wonder how this ancient site was once dwelled by around 40,000 people living in a system of equitable sharing of resources, such as housing and food. The first urban sanitation system and one-of-a-kind bathing area for rituals excavated during the 1920s. It is called, The Great Bath and is built with bricks of the same sizes, totalling an area of 897 square feet.

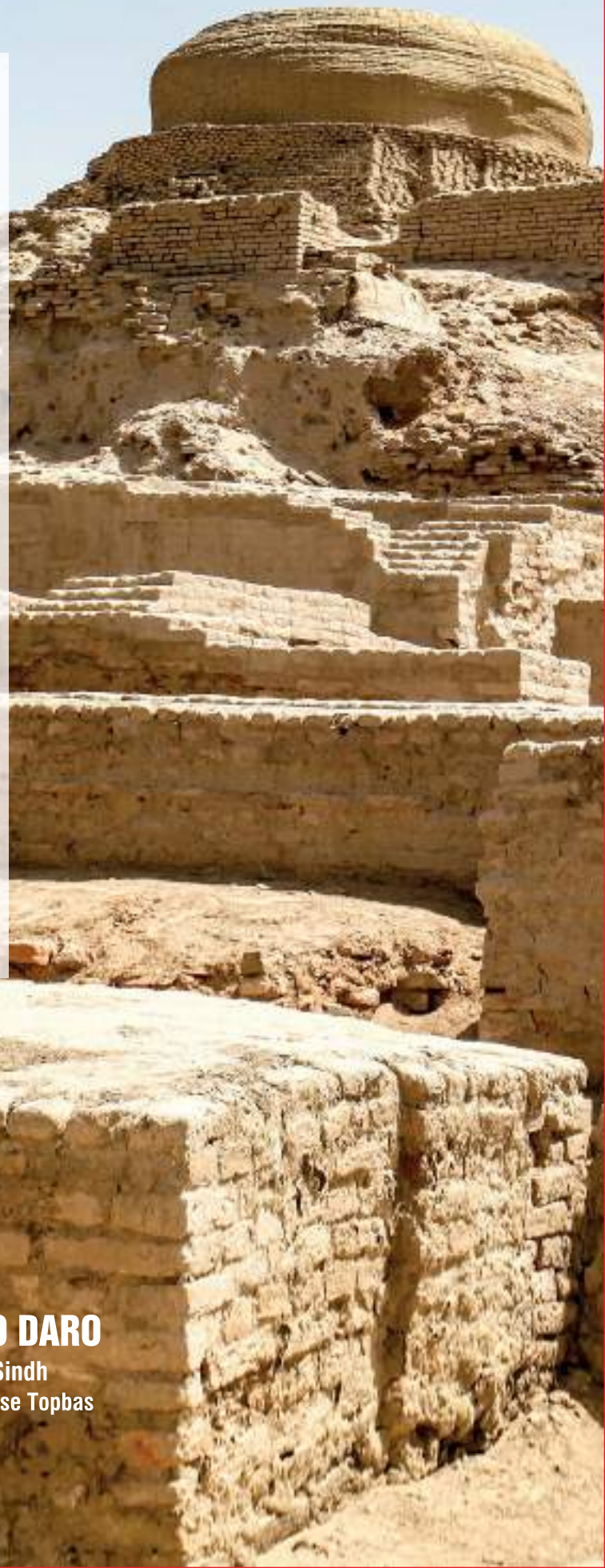
This 750-acre land was once fertile and close to the banks of River Indus, so early human clans found it an ideal location to settle down. They cultivated wheat, barley, melon seeds, and domesticated animals, pottered bowls, mouse traps, vases, and grafted timeless manuscripts on tiles.

This UN Heritage Site still baffles archaeologists around the world today.

MOHEN-JO DARO

Larkana, Sindh

Photo Credit: Ayse Topbas





Ormara Turtle Beach is located at roughly 327 km from Karachi, and it takes 6 hours of drive to reach. Along the way, one can visit Hingol National Park, Kund Malir, and Kohi Chiltan.

ORMARA BEACH

Balochistan

Photo Credit: iTravels, Karachi



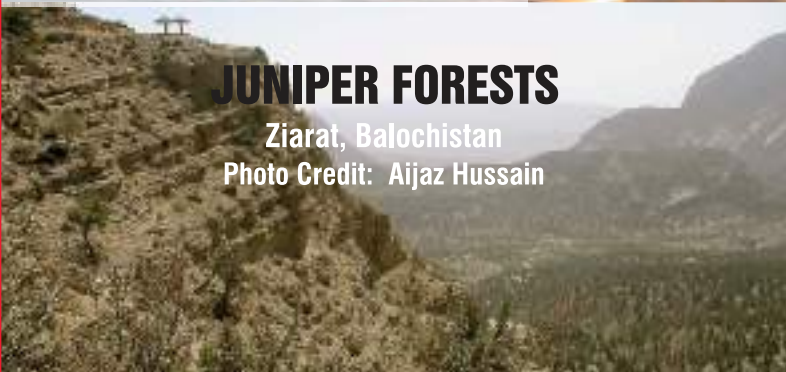
Juniper Forest, located near the famous Ziarat Residency of Founder of Pakistan, Quaid-e-Azam Muhammad Ali Jinnah, is a UN Heritage Site and second largest juniper forest in the world. It features world's oldest Genus Juniperus species that have global significance of combating climate change and helping in understanding past weather patterns.



JUNIPER FORESTS

Ziarat, Balochistan

Photo Credit: Aijaz Hussain



Shehr e Roghan (or Gondrani) in Lasbela, is known as The City of Caves. These caves are as old as the 8th Century and were once used by Buddhist monasteries.

PRINCESS OF HOPE

Balochistan

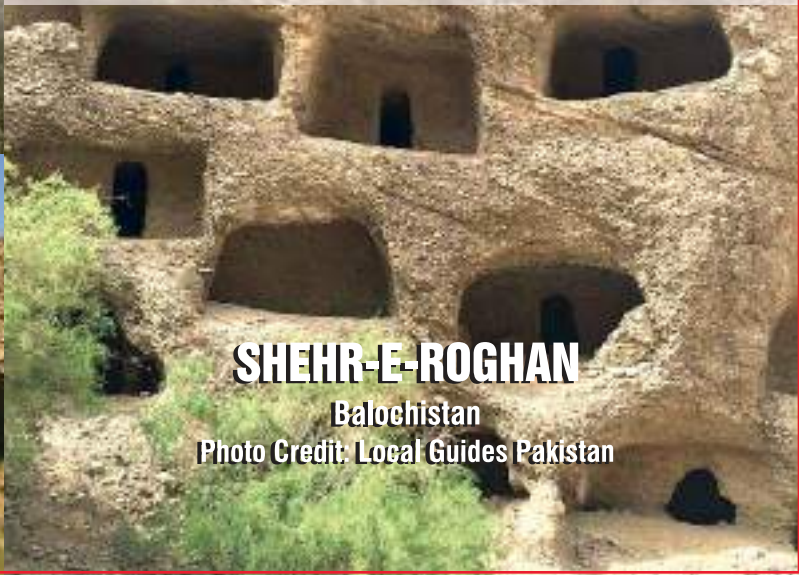
Photo Credit: DiscoverPakistan

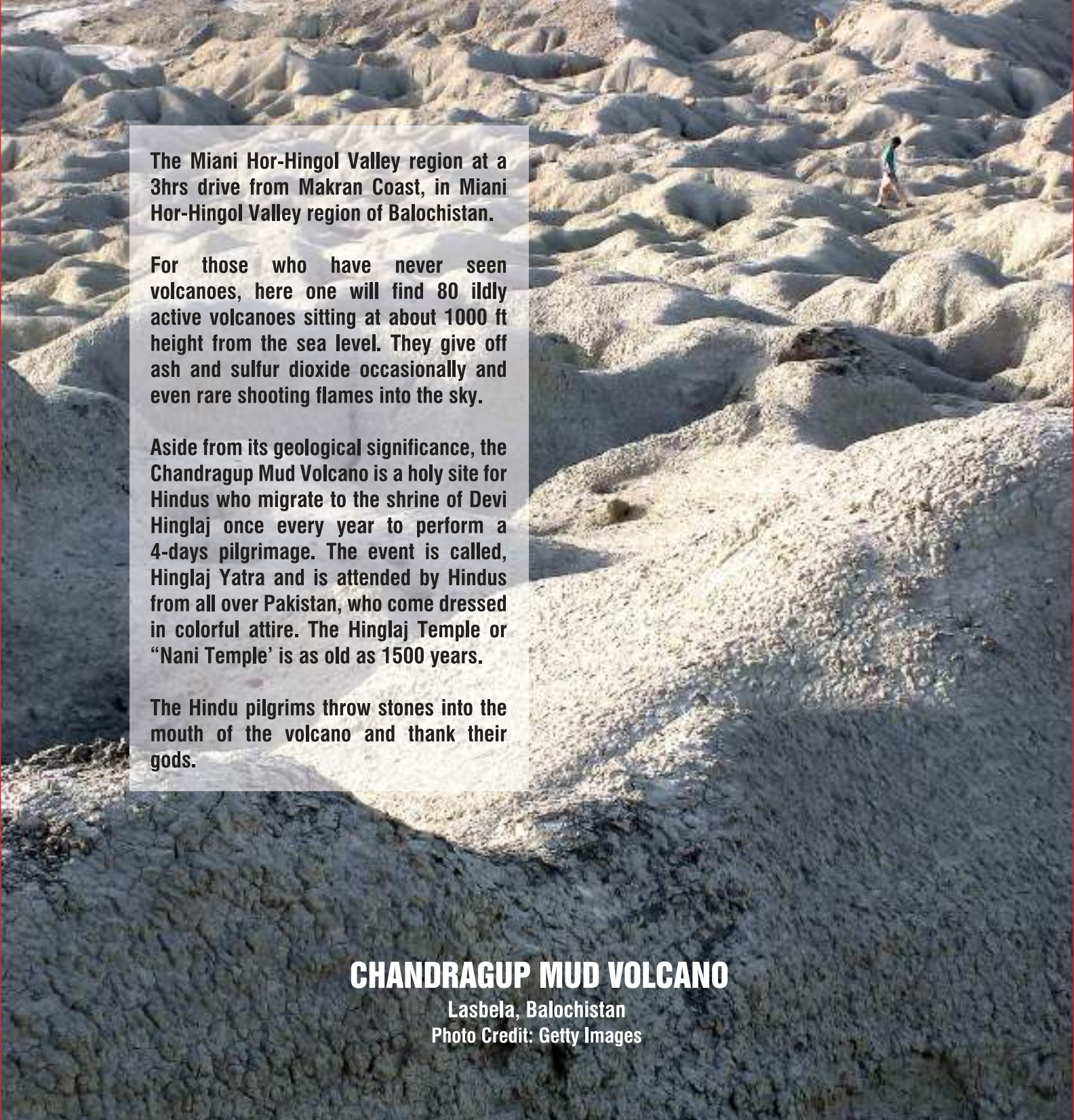


SHEHR-E-ROGHAN

Balochistan

Photo Credit: Local Guides Pakistan





The Miani Hor-Hingol Valley region at a 3hrs drive from Makran Coast, in Miani Hor-Hingol Valley region of Balochistan.

For those who have never seen volcanoes, here one will find 80 idly active volcanoes sitting at about 1000 ft height from the sea level. They give off ash and sulfur dioxide occasionally and even rare shooting flames into the sky.

Aside from its geological significance, the Chandragup Mud Volcano is a holy site for Hindus who migrate to the shrine of Devi Hinglaj once every year to perform a 4-days pilgrimage. The event is called, Hinglaj Yatra and is attended by Hindus from all over Pakistan, who come dressed in colorful attire. The Hinglaj Temple or “Nani Temple’ is as old as 1500 years.

The Hindu pilgrims throw stones into the mouth of the volcano and thank their gods.

CHANDRAGUP MUD VOLCANO

Lasbela, Balochistan

Photo Credit: Getty Images



Photo Credit: Sajjad Ahmed





MOOLA CHOOTAK

Khuzdar, Balochistan
Photo Credit: DO, Guided Tours

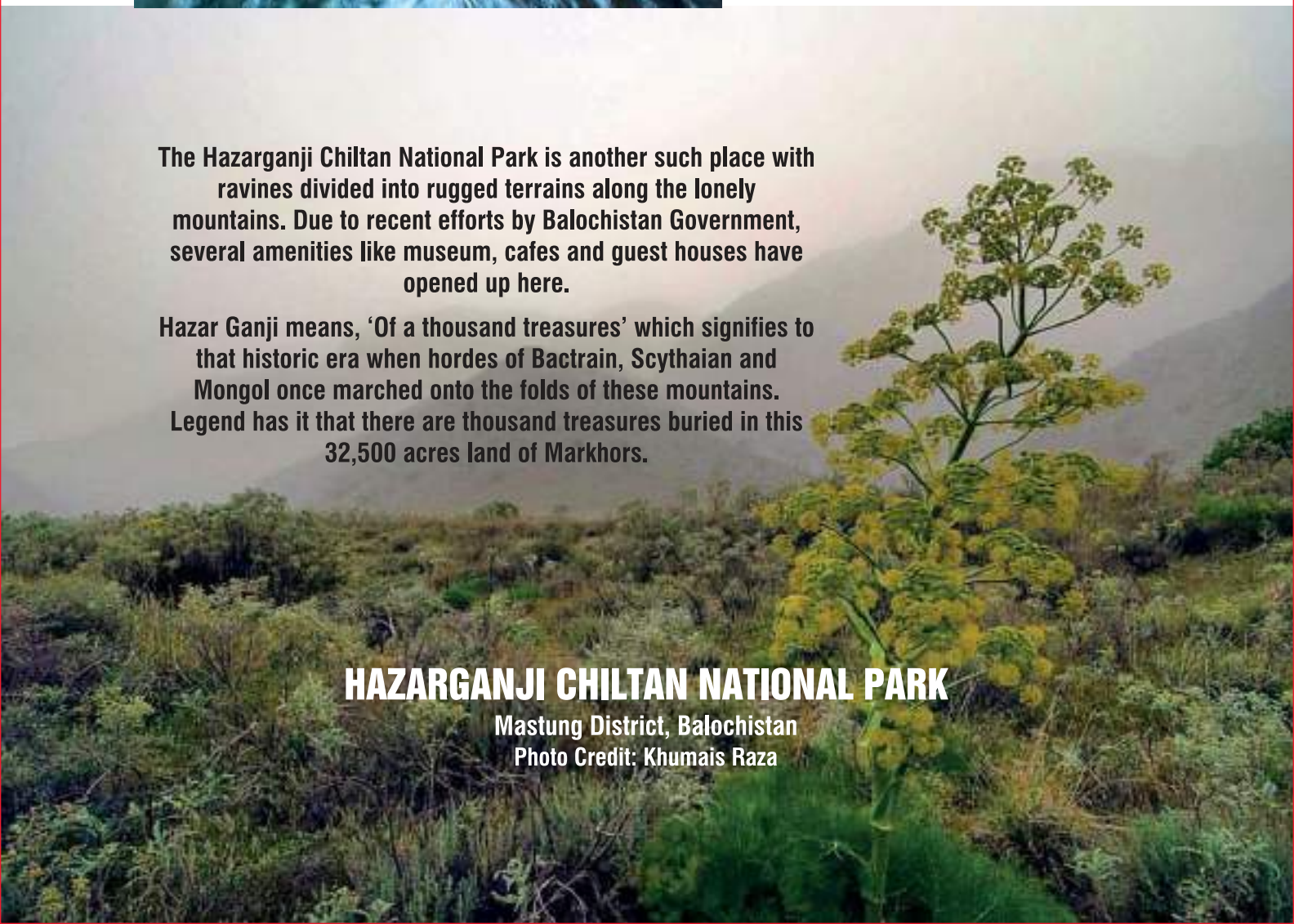
Balochistan is known as a goldmine of mystical wonders that to date remain largely undiscovered. A few 105 km north-east of Khuzdar, there is a hidden ravine that has a rainbow-colored waterfall falling somewhere near the village of Kohave. The place is called Chota Chotok Moola, where 2000 years ago, alongside the Moola River, once dwelled an ancient civilization. As soon as this oasis was discovered, travel operators began to market it as an ideal point for picnics, snorkeling, and hiking.

The Hazarganji Chiltan National Park is another such place with ravines divided into rugged terrains along the lonely mountains. Due to recent efforts by Balochistan Government, several amenities like museum, cafes and guest houses have opened up here.

Hazar Ganji means, 'Of a thousand treasures' which signifies to that historic era when hordes of Bactrian, Scythian and Mongol once marched onto the folds of these mountains. Legend has it that there are thousand treasures buried in this 32,500 acres land of Markhors.

HAZARGANJI CHILTAN NATIONAL PARK

Mastung District, Balochistan
Photo Credit: Khumais Raza



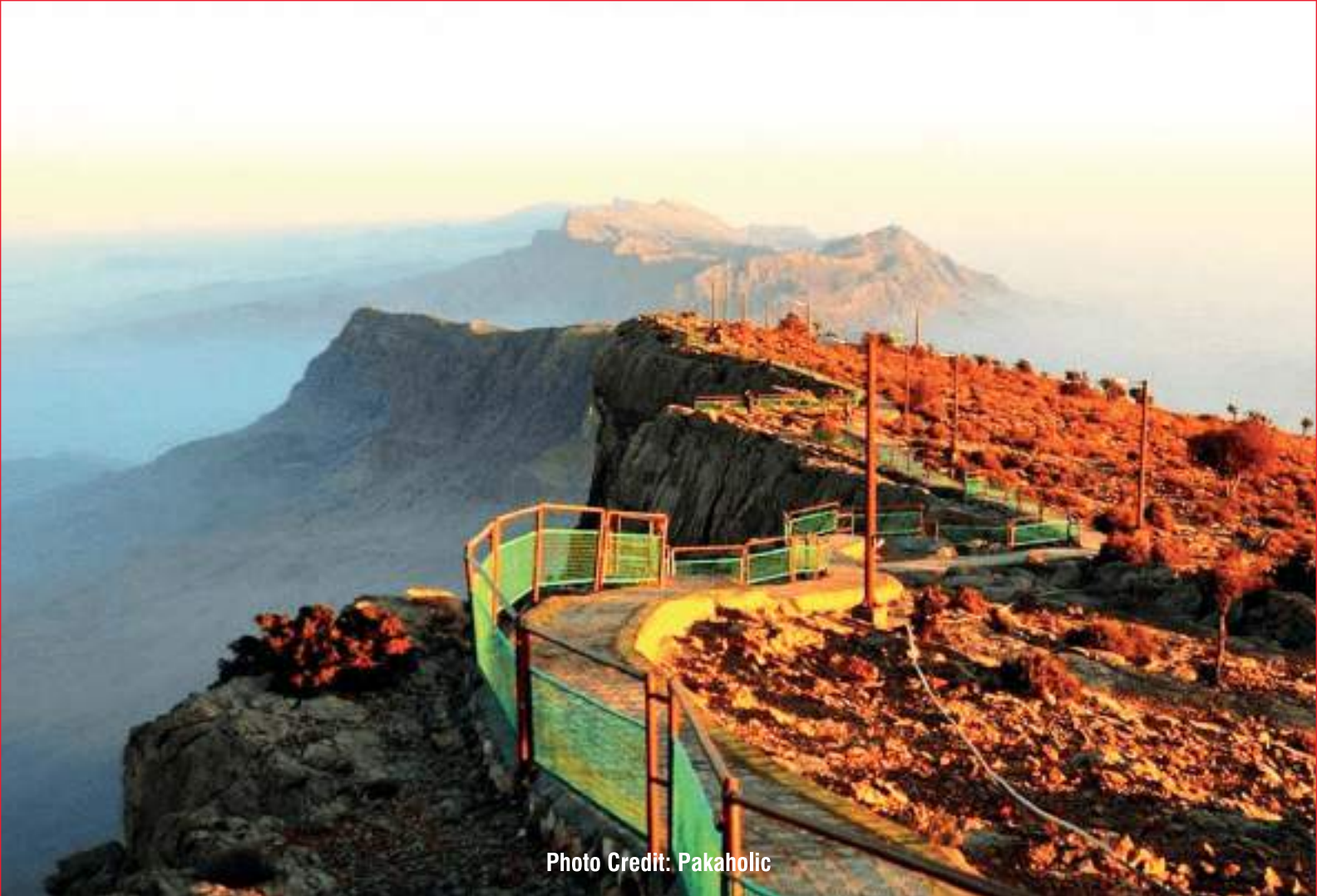


Photo Credit: Pakaholic

GORAKH HILL STATION

The Gorakh Hill Station, located in the vast Kirthar Mountains, at 5,689 feet above sea level, rests at about 400km from Karachi. It can be reached via the Indus Highway route that passes by farms, and other exotic places reminiscent of the Great Canyon in USA.

At night, the entire Milky Way is visible and in winters, it snows. At a little distance, is an ancient graveyard, Butta Quba, where legend has it that Big Foots exists.



Camping after sunset, Gorakh Hill Station, Sindh
Photo Credit: RnB Tours

ADVENTURE TOURISM POTENTIAL

Adventure tourism is a trip that features at least two of the three elements: physical activity, nature sight-seeing, and cultural immersion. It is one of the fastest-growing segments of the tourism industry and plays an important role in attracting high-end customers from all around the world.

The entire logistics chain that starts from accommodation, and transport to travel services needs to be well interlinked, especially in terms of infrastructure and equipment provision.

An inherent characteristic of adventure is that it introduces people to new cultures and often leads to discovery of new landscapes. Being physically active and fit is essential but not a necessity, as some recreational facilities are exclusively designed for people who cannot be too mobile. However, while the adventure is truly about pushing boundaries, it is quite important to respect one’s limit while treading into risky and unfamiliar territories.



With that said, adventure tourism is either categorized as high risk (hard) or low risk (soft). The following table exhibits thought-provoking classifications of activities under each of the two categories that are either currently available in Pakistan or need to be executed:

HARD TOURISM		SOFT TOURISM	
Mountaineering	Rock Climbing	Backpacking	Lift Chair
Sky Diving	Trekking	Bird watching	Hiking
Ice Climbing	Zip Line	Camping	Snorkeling
Parachuting	Para Gliding	Fishing	Jet Ski
Cliff Diving	Heli Ski	Safaris	Para Sailing

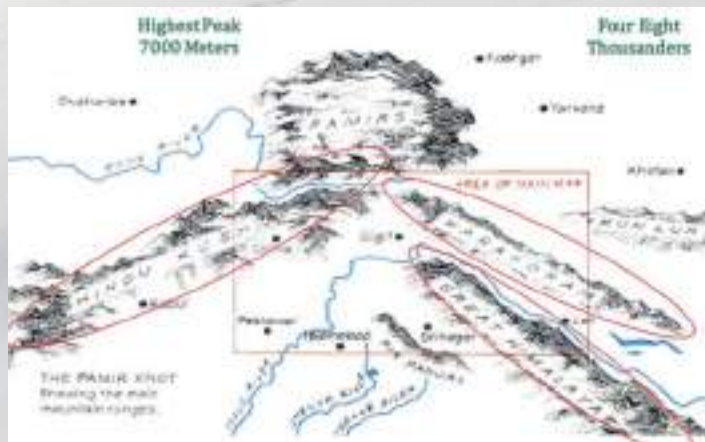
Table 6: Adventure Tourism Classifications

Aside from the broader details on lakes and PTDC Hotels, Map 3 also pinpoints some stunning locations where domestic tourism is still in its infancy. According to statistics provided by the Winter Sports Federation of Pakistan, the year 2019 saw the highest number of trekkers and mountaineers: an estimated 1350 in total versus 550 in 2016. However, due to COVID-19 of 2020, these numbers fell drastically.

When it comes to peaks, Pakistan comes at number 2 spot after China and Nepal, each taking first position. The following table crisply captures these facts:



THE TEN EIGHT-THOUSANDERS
Sketch of Pamir Knot, Pakistan
 Photo Credit: Winter Tourism Federation



S.No.	HEIGHT	KARAKORAM	HINDUKUSH	HIMALAYAS	TOTAL
1.	Above 8000m	4	-	1	5
2.	7501-7999m	29	3	2	33
3.	7001-7500m	102	20	1	127
4.	6501-7000m	143	40	4	187
5.	6001-6500m	220	126	5	351
	Total	498	189	13	720

Table 7: Height Distribution of Mountain Ranges in Pakistan, WSFP

MALAM JABBA

Swat Valley, Khyber Pakhtunkhwa

Photo Credit: Youth Impact Pakistan



GASHERBRUM II
Photo Credit: Trango Adventure



GASHERBRUM 4
Photo Credit: Daniel Born



K2 BASE CAMP CORNCODIA
Photo Credit: Wallpatic



BROAD PEAK
Photo Credit: Brad



NANGA PARBAT
Photo Credit: Haseeb Jamil, Unsplash

BALTORO GLACIER, GILGIT BALTISTAN

After Vatnajökull Glacier in Iceland, the Baltoro Glacier is the seventh largest in the world and by length the longest non-polar glaciers in the world. Its route leads to the monstrous K2, second highest mountain in the world that the legendary Pakistani high-altitude climber, Mohammad Ali Sadpara died while trying to conquer it without oxygen.

For trekkers, it is a good 15-days journey with stunning sights of mind-blowing peaks, the Trangos (Granite Towers), and lonely Cathedrals. A renowned photographer, Galen Rowell, once testified that the trek from Baltoro to Concordia leads to the throne of mountain gods, where all three glaciers: Godwin-Austen, Upper Boltoro and Vigne, converge.

Nearly 70 percent of trekkers take this route. Pakistan Army is deployed year-round here to assist hard adventure travelers who often set base at Goro II and Concordia, atop the glaciers.

S NO.	NAME	AREA (KM2)	LENGTH (KMS)
1.	Siachen	1180	75
2.	Biafo	625	68
3.	Baltoro	755	62
4.	Batura	290	58
5.	Hispar	620	53
6.	Rimo	510	45
7.	Chogo Lungma	330	47
8.	Panmah	400	44
9.	Khurdopin	280	41

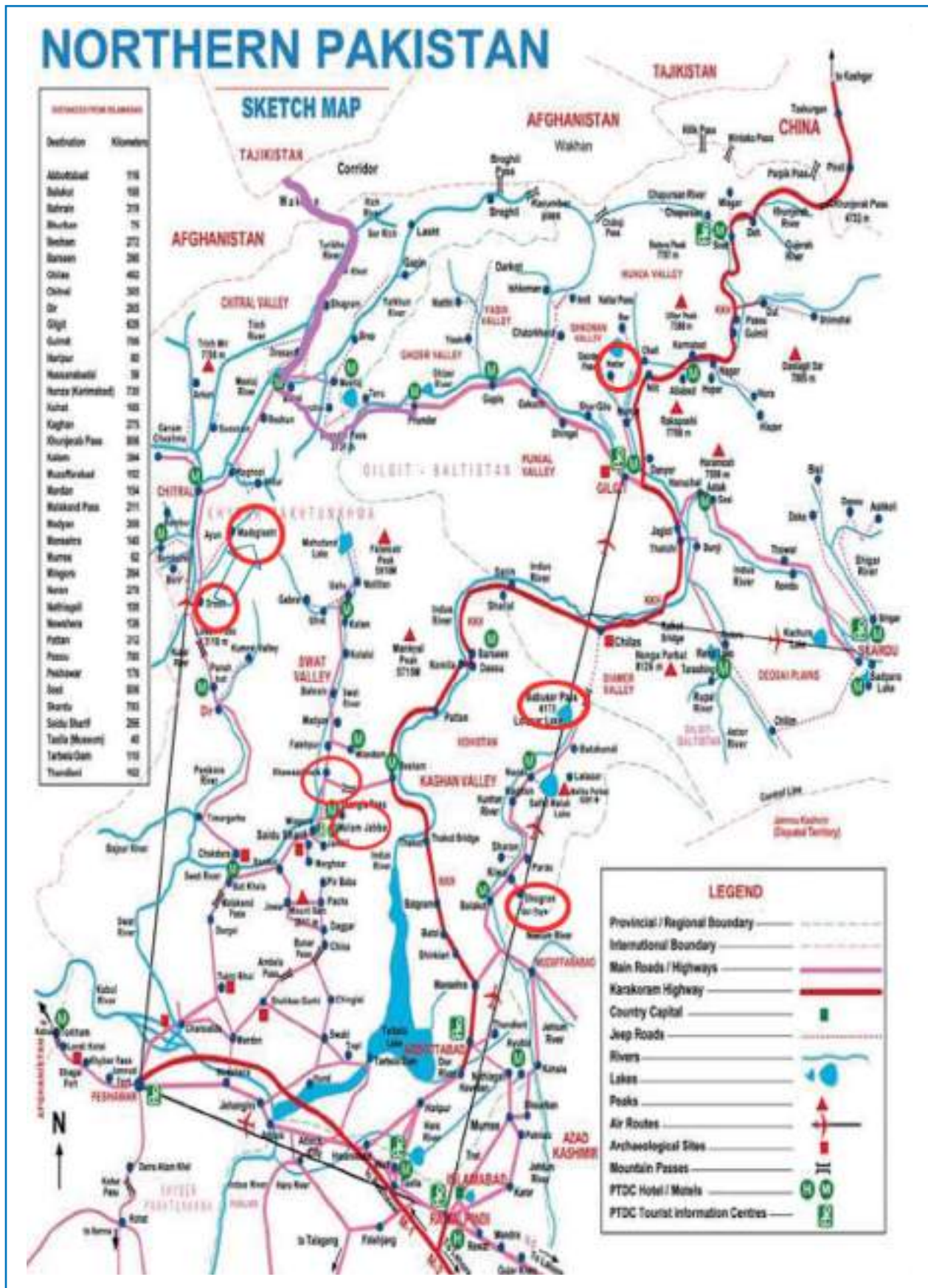
Table 8: Distribution of Glaciers of Pakistan, WSFP

BALTORO GLACIER

Siachen

Photo Credit: Daniel Born





Map 3: Ski Areas of Pakistan; Source: WSF

HISPAR LA SNOW TREK KARAKORAM

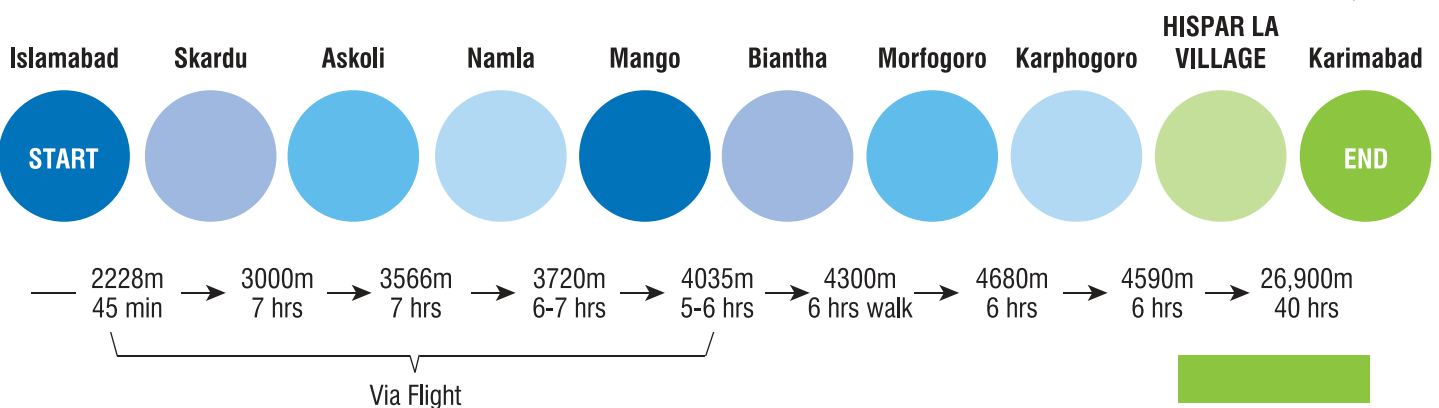
This signature annual event usually takes place in July and takes tourist to an arduous but mesmerizing journey along the ancient highway that connects two Mount Kingdoms - Hunza in the west, and Baltistan in the east. It is the last stop for most animals like Markhor, Himalayan Bear and Snow Leopard. The entire trek is challenging but rewarding as one gets to stay in huts of local shepherds on icy glaciers and walking past cold streams. A truly life-changing experience.



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21 DAY TRIP





Winters in Pakistan bring a multitude of enthralling sports events. According to Air Commodore (Rt.) Shahid Nadeem, Secretary of Winter Tourism Federation of Pakistan, adventure tourism in the north has a great reputation among foreign tourists but participation from locals remains marginal.

Festivals like Hindukush Snow Sports in Chitral and the Snow Marathon and Winter Sports Gala in Malam Jabba, have gained tremendous momentum recently. For the first time, International Snowboarding Festival was held in January 2020. It stretched from Chitral to Gilgit Baltistan via Swat, and through this single event, skiing, snowboarding, and ice skating have found new homes such as Madak Lusht, Naltar.

SNOW MARATHON 2020, RED BULL



The Snow Marathon 2020 is organized by Red Bull and spearheaded by Cdr. (Rt.) Shahid Nadeem, Secretary of Pakistan Winter Sports Federation. It is part of the Hindukush Snow Sports Festival of 3-days.

This unique event is attended by both foreigners and locals who are provided gear on rent.

What makes it a stand-out is its first-ever Snow Marathon in Pakistan.



At 8,500 ft above sea level, a rich cultural 3-days annual festival, Winter Sports Gala, takes place among tall alpine trees and lofty snow-capped mountains that is attended by budding young adventurers.

The province of Khyber Pakhtunkhwa is undoubtedly an ideal destination for such foolhardy excursions with its tall mountains, rhythmic waterfalls, natural springs, and breathtaking spots. The event features live music shows, food stalls, handicraft displays, ice skating, tobogganing, and more.

MALAM JABBA WINTER SPORTS GALA, TCKP



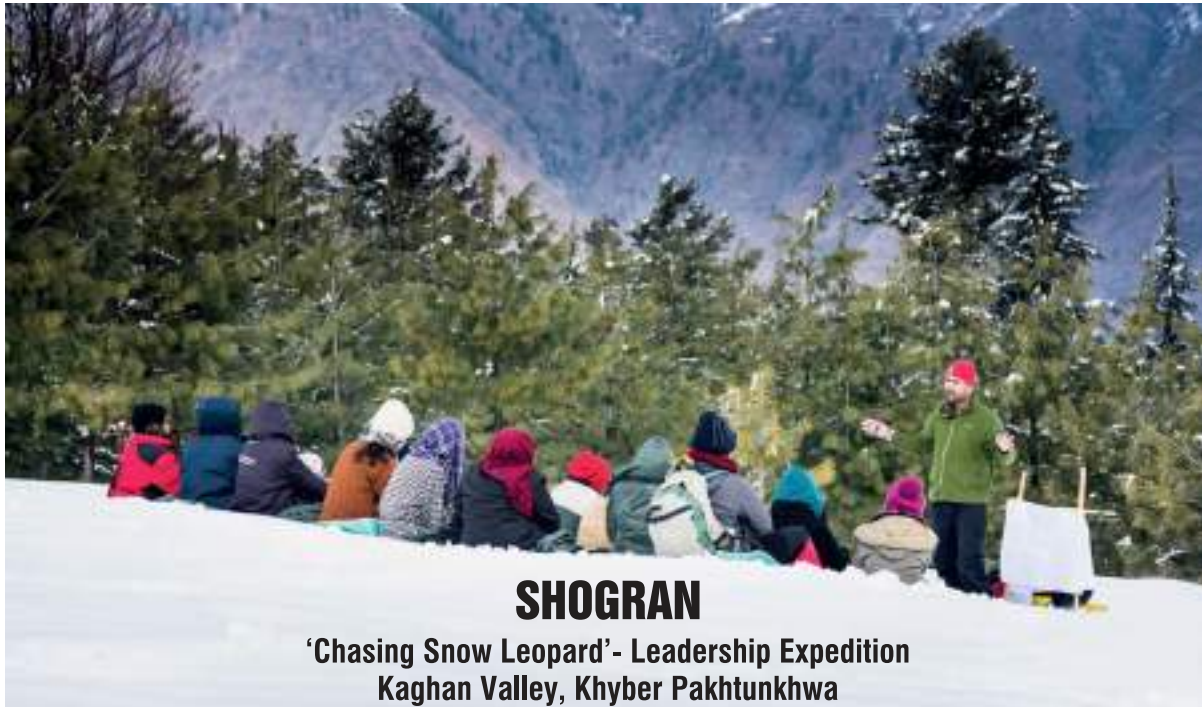
The Hindukush Snow Sports Festival is a 3-days event in the colorful and cultural city of Chitral that is home to one of the best hospitalities in Pakistan.

This annual bonanza features ice skating, snowboarding, skiing, and other small events like ice hockey matches, workshops on eco-tourism, and a snow sculpting competition. One gets to enjoy delicious BBQ with colorful arts performances by skiers of Madaklasht on a special cultural night.

CHITRAL HINDUKUSH SNOW SPORTS, TCKP



YOUTH LEADERSHIP PROGRAM IN NATURAL CLASSROOMS



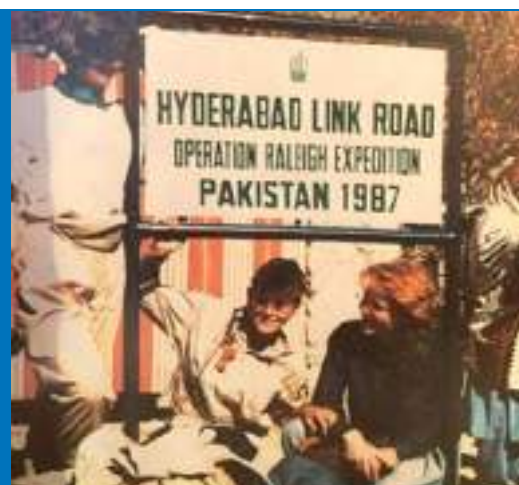
SHOGRAN

'Chasing Snow Leopard'- Leadership Expedition
Kaghan Valley, Khyber Pakhtunkhwa

Pakistan - country that is still considered as terra-incognita for travelers, nature lovers, and adventure enthusiasts – holds many surprises. From the magnificent peaks of the Karakoram ranges to the fertile Indus valleys, Pakistan is home to some of the most diverse and stunning landscapes in the world. Its rich cultural heritage of tribal races, ancient Silk route, ruins of Mohenjo-Daro, archaeological tours of Lahore, and historical Gandhara civilization continue to enchant travelers, Pakistan presents another unique aspect of its natural beauty to the world – its lead learners consider it classrooms.

Hardly anyone knows the fact that back in 1987, Pakistan hosted 120 global youth leaders for record three months during the Operation Raleigh Expedition. Participants were involved in a series of projects associated with scientific research, community services, and adventures.

Photo Credit: raleighinternational.org





Since then, Pakistani wilderness has been home to global leadership development initiatives, despite law-and-order constraints. The Adventure Foundation Pakistan (AFP) too has a 30-year history of conducting outdoor youth development programs.

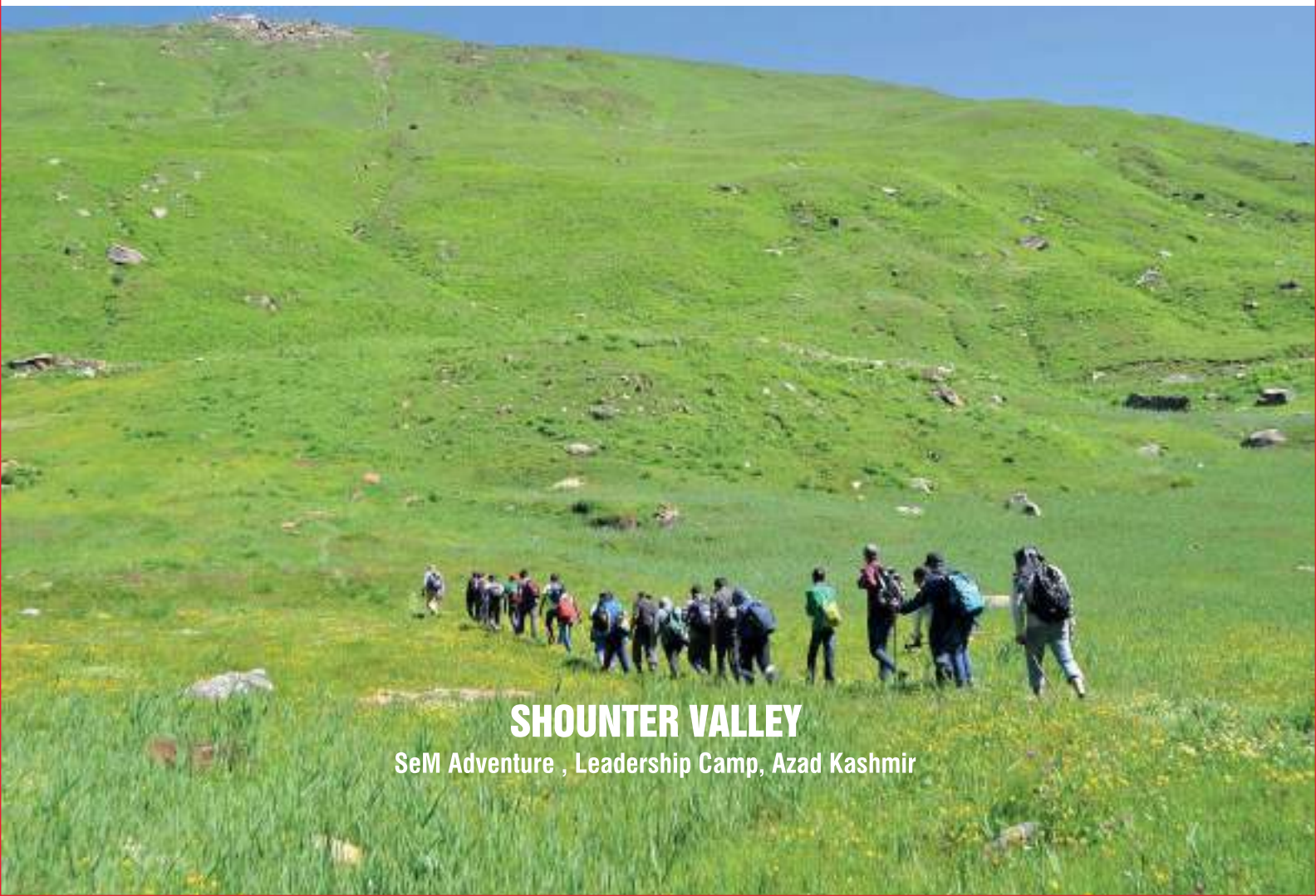
The Youth Impact Pakistan has managed to groom thousands of Pakistani and global youth leaders through enthralling wilderness-based leadership camps that are held year-round in the Himalayas, on the beaches, in the deserts, and even the snowy white landscape of Pakistan.

In modern times, institutions like Outward Bound and National Outdoor Leadership School have been utilizing nature to hold impactful natural classrooms aimed at developing and transforming human behaviors. Similar models are today running successfully in Pakistan directly

complement the development of domestic tourism and have played a pivotal role in building a positive brand image of Pakistan in the world.

Leadership Adventures are still relatively new in Pakistan. Natural classrooms and survival camps in the wilderness are a phenomenon, where the learner is put in close contact with nature and taken through a series of purposeful physical and psychological experiences.

Facilitated by competent leaders, participants get a chance to test and identify their ability to tackle real-life challenges and internalize the take-aways for personal and professional growth. This educational process is part of the renowned Experiential Learning methodology, which is combined with Outdoor Education, models to create a powerful transformational experience that lasts a lifetime.



SHOUNTER VALLEY

SeM Adventure , Leadership Camp, Azad Kashmir



PAYE MEADOWS

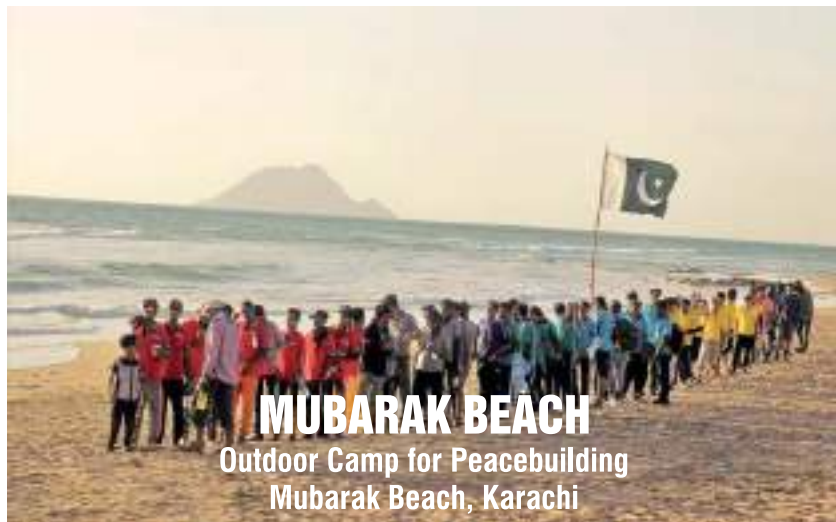
Markhor Leadership Conference
Shogran, Khyber Pakhtunkhwa

Like any other educational philosophy, leadership adventures undergo cyclic evolution. With little happening in pioneering countries like UK, USA, Australia, and New Zealand, the eastern world has the chance and dynamism to

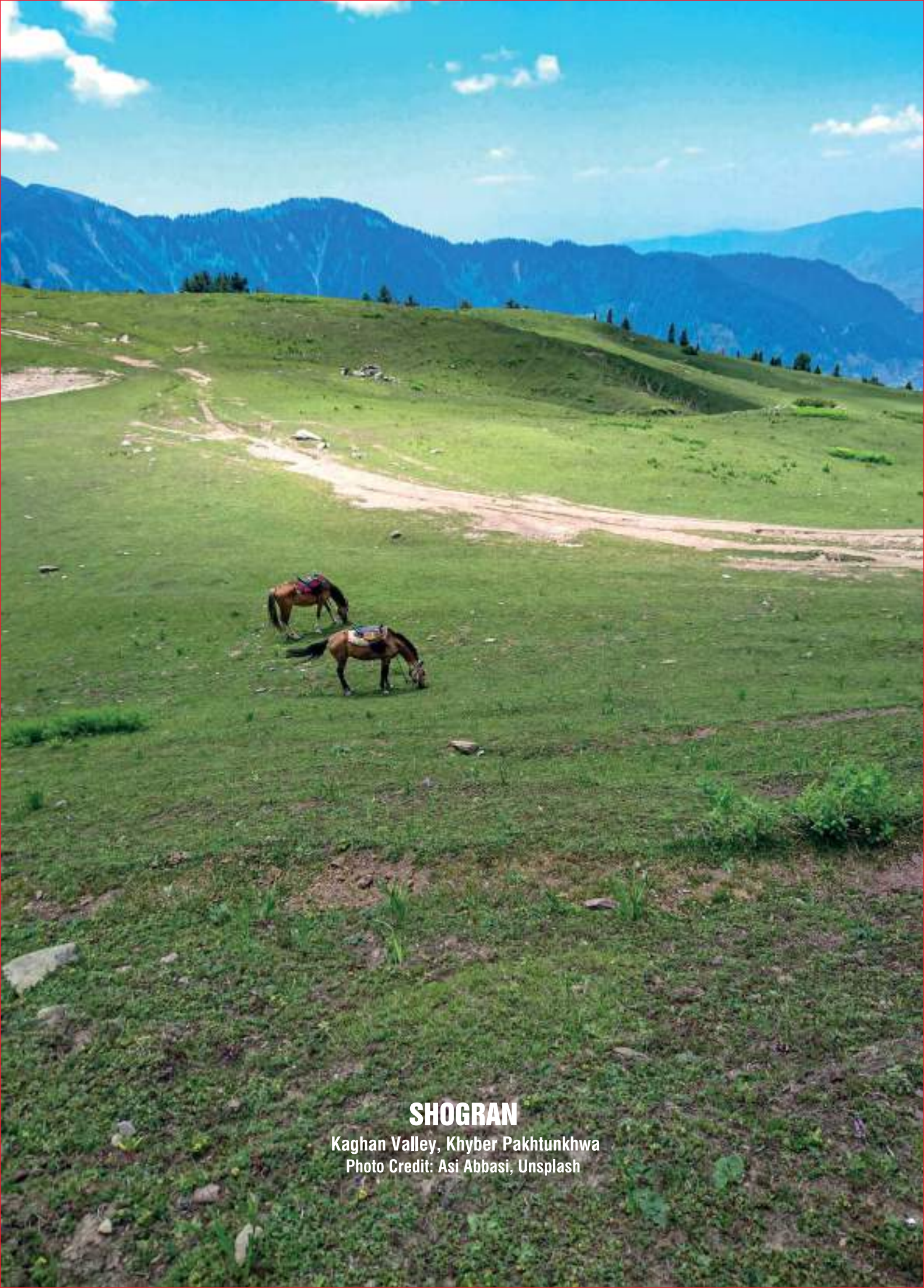
cash in, as envisioned by James Neill in his work on the future of wilderness-based education: “In the longer-term, future decades could see the significant emergence of Outdoor Education knowledge-building from Asia”.

Youth Impact Pakistan can lead the charge in filling this vacuum of opportunities, given its proven youth development program that is a blend of eastern philosophy and outdoor experiential learning, as is necessary for capacity building of young Pakistani leaders of tomorrow.

Abdul Samad Khan
Chief Executive Officer,
Youth Impact Pakistan



MUBARAK BEACH
Outdoor Camp for Peacebuilding
Mubarak Beach, Karachi



SHOGRAN

Kaghan Valley, Khyber Pakhtunkhwa
Photo Credit: Asi Abbasi, Unsplash

MARKHOR LEADERSHIP CONFERENCE



Conference Camps are usually placed at more than 10,000 ft. above the sea level



WHY MARKHOR

The Markhor is the national animal of Pakistan and is a symbol of pride and nobility. It takes the progressive and peaceful image of Pakistan to the world.

The literal meaning of the name Markhor is snake eater, though we are not sure if this wonderful creature eats or kills snakes to survive. But one thing is certain that it goes through an unbelievably challenging life cycle for its existence. It is an endangered species that lives at high altitudes, in rocky terrain and steep climbs, with shortage of food and threat of hunting. These factors contribute to its resilience, patience, and adaptability.

It is for these innate qualities that the Markhor has been chosen as a metaphor for naming Pakistan's first wilderness-based youth leadership conference. Just like the Markhor, the Pakistani youth too faces an un-ending wave of uncertainty, change, and urge to survive. This Markhor spirit demands them to be agile, high in energy, self-motivated, extremely adaptable, tolerant, committed and daring to overcome all odds stacked against them.



The Curriculum is a blend of Adventures, Outdoor Education, and Leadership Development

Very few people are aware that high up in the Himalayan, youth leaders gather to test their endurance in the wildest playoffs designed by a native adventure enthusiast, Abdul Samad. The 3–5-day event is carefully planned after proper scientific research, community engagement, and area inspection to ensure chosen lot emerge as global leaders.

MISSION: Develop 10,000 young social leaders by the year 2030, who are dedicated, responsible, self-motivated, and bear strong moral and character values.

ABOUT CONFERENCE: 100 selective young social leaders from Pakistan and South Asia region gather in the Himalayas along with international speakers and

accomplished leaders of industry and change-makers from the social sector, academia, the public, and corporate sector in five days of camping themed on youth leadership.

SELECTION PROCESS: The delegates are short-listed through an intense process where thousands of young applicants with high hopes to be selected, try to prove their keenness to be part of this lifetime experience.

Only a few can make it till the end. Those who are best of the best are taken to the next level, where through an intense four day long social leadership development experience, return home with a clear road map for their own lives, as well as a greater sense of responsibility toward building Pakistan.





The Delegates have so far represented 18 Native Languages and 5 Religions

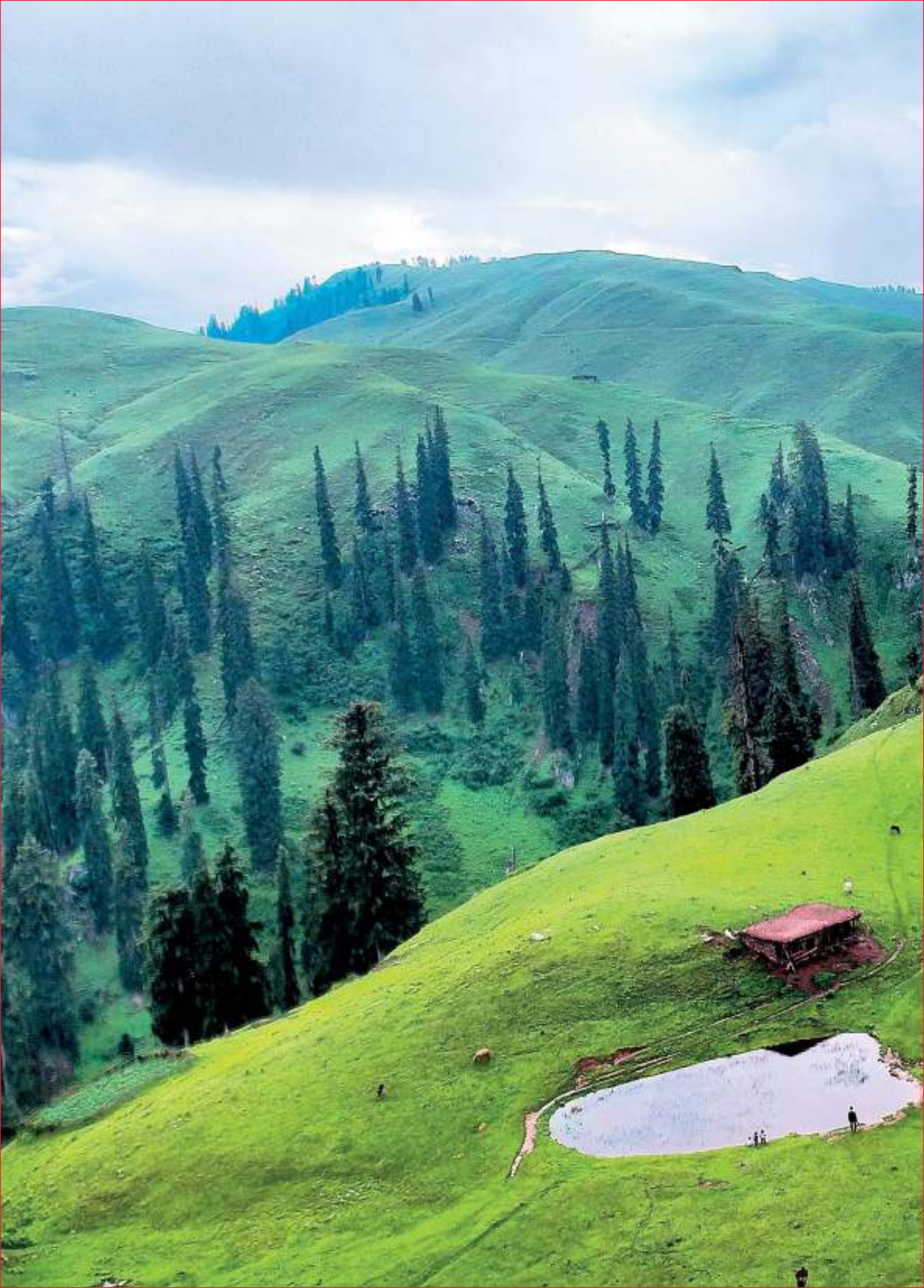


A total of 103 National and International Leaders, Speakers, and Trainers have attended so far.



639 Delegates Graduated and 87 Percent declare it life-changing experience







MANSEHRA

Khyber Pakhtunkhwa

Photo Credit: Muhammad Khubaib Sarfaraz, Unsplash



CHANGA MANGA FOREST

Kasur, Punjab

Photo Credit: Ali Rizvi, Unsplash



ECOTOURISM PROJECTS SUSTAINABLE TOURISM FOUNDATION OF PAKISTAN

DOLPHIN ECO-TOURISM



PROJECT OBJECTIVES

1. Raising awareness of conservation of Indus River Dolphin around the Taunsa Barrage
2. Mobilizing fishermen community
3. Establishing two eco-tourism community centers
4. Establish two teams of friends of the Indus River Dolphin and conduct capacity-building programs.

GREEN TREKKING CAMPAIGN

PROJECT OBJECTIVES

Practical steps to inculcate sense of responsibility among trekkers and travelers to conserve natural landscape under the slogan, “take nothing but photos, leave nothing but footprints”. STFP has developed Green Trekking Code of Ethics to achieve above objective.



YOUTH ENVIRONMENT LEADERSHIP



PROJECT OBJECTIVES

Build leadership skills of young people aged 16-22 through exciting out-of-the-class adventures in the wilderness, so they can discover their potential, overcome fears, and develop passion to contribute positively to Pakistan through rigorous program featuring four groups of 25:25 male/female participants.



ALTIT FORT

Hunza, Gilgit Baltistan

Photo Credit: Aakash Ashraf, Pexels



MAPPING OF UNTAPPED AREAS FOR PUBLIC PRIVATE PARTNERSHIPS

KHYBER PAKHTUNKHWA

AREA: 101, 741 Km²
POPULATION: 35.5 million
EMPLOYED PERSONS: 7.4 million

UNTAPPED OPPORTUNITY

- Madaklusht
- Kumrat Valley
- Golan Gol Chitral
- Supat (Hazara Kohistan)
- Broghil (Chitral)
- Bayun (Swat)
- Sheikh Badin

ACTIVITIES

- Religious tourism in Takht Bhai and other areas
- Yak Polo Festival
- Kalash Festival
- Golf along Indus River
- Fort Hopping
- Camping pods
- Rafting in Kabul River, Kunhar river in Naran
- Markhor Youth Impact
- Hispar La Trek
- Paragliding in Chitral



BALOCHISTAN

AREA: 347, 190 Km²
POPULATION: 12.3 million
EMPLOYED PERSONS: 2.5 million

UNTAPPED OPPORTUNITY

- Hingol National Park
- Khuzdar
- Zargon Valley
- Chiltan Hazarganji
- Sher-e-Roghhan
- Moola Chotok
- Noorani Gandwaa
- Kund Malir Beach
- Pir Chatal
- Jiwani
- Pir Ghayab Waterfalls
- Astola Island
- Gawadar
- Harnai Pass
- Khojak Pass

ACTIVITIES

- Jhal Magsi Jeep Rally
- Gawadar Jeep Rally
- Hingol National Park
- Sibi Festival
- Buzkashi Festival
- Fishing areas





SINDH

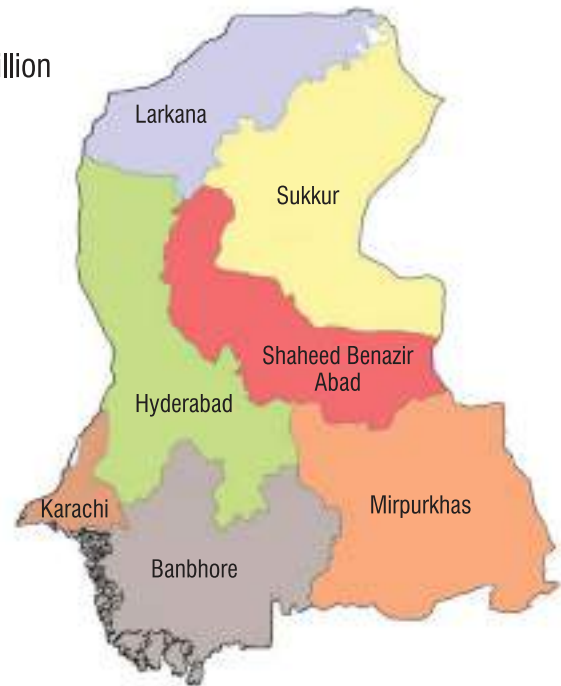
AREA: 140, 941 Km²
POPULATION: 47.9 million
EMPLOYED PERSONS: 14.4 million

UNTAPPED OPPORTUNITY

- Ranikpot fort
- Kot Diji Fort
- Paco Qilo
- Ruins at Aror
- Chakhandi Tomb
- Ran of Kutch
- Wildlife Sanctuary
- Bakri Waro Lake
- Tharkpar Desert
- Kirthar National Park
- Mubarak Village
- Kotri Barrage
- KeenjharLake
- Haleji Lake
- Makli Graveyard

ACTIVITIES

- Coastal tourism
- Arabian Sea Sports
- Nara Desert Safari
- Lal Shahbaz Urs
- Shah Abdul Bhittal Urs
- Karachi Literature Festival



PUNJAB

AREA: 205, 344 Km²
POPULATION: 110.1 million
EMPLOYED PERSONS: : 37.6 million

UNTAPPED OPPORTUNITY

- Letrar Valley
- Fort Munro
- Sown Valley
- Bun Karor
- Rohtas Fort
- Tila Jogian

ACTIVITIES

- Mughal Heritage
- Basant Festival
- Desert Safari in Cholistan
- Boat safari at Taunsa
- Ecotourism along Indus
- Traditional cruise tour
- Trekking in Murree Areas
- Gandhara tourism at Taxila and tour of forts and palaces. Others like handicraft and Spiritual trails
- Handicraft trail
- Indus Golf
- Cultural tourism in Lahore Gujranwala, Faisalabad, Multan
- Faiz Aman Mela & Intl. Festival





GILGIT BALTISTAN

AREA: 72,971 Km²
POPULATION: 2 million
EMPLOYED PERSONS: No info.

UNTAPPED OPPORTUNITY

- Deraly Lake
- Ghotum Sar Parehing
- Rupal Tarashing
- Bunner Valley
- Altit Ahmad Abad Track
- Shimshal, Manthoka Waterfall
- Katpana Desert and Katpana Lake
- Thornik Valley
- Bagrote Valley
- Jarbaso Lake
- Babusar
- Borit Lake
- Gappa, Dainter
- Hushe, Thally Valley
- Khamosh Abshar



ACTIVITIES

- World's highest cold desert rally Sarfaranga
- Fort Hopping
- Trekking
- Mountaineering
- Trans Himalayan Jeep Rally
- World's highest cycling race Tour de Khunjerab
- Paragliding
- Shandur Festival
- Rama Festival
- Tukhm Rezi Festival
- Ginani Festival
- Cherry Blossom Festival in Hunza

AZAD KASHMIR

AREA: 13,297 Km²
POPULATION: 4 million
EMPLOYED PERSONS: : No info.

UNTAPPED OPPORTUNITY

- Leepa Valley
- Basghar Fort
- Neelum Valley
- Ramkot Fort
- Pir Chanasi
- Dhirkot
- Suddhen Gali
- Mangla
- Neelabat
- Lasdana

ACTIVITIES

- Trekking and hiking
- Traditional cuisine tour
- Mountaineering in Neelum Valley
- Recreational tourism in different valleys
- Ecotourism in protected areas of AJK
- Handicraft trail
- Promotion of Adventure Sports, such as rock climbing, mountain biking, pony riding, river rafting, kayaking, snowboarding, and skiing





MAHONDAND LAKE

Kalam, Khyber Pakhtunkhwa

Photo Credit: Jongwoo Park



THE CHALLENGES AT HOME

Pakistan is one of those fortunate countries in the world that offer complete package of tourist spectacles – beaches, natural landscapes, valleys, waterfalls, caves, geysers, and mountains manifesting an array of different colors.

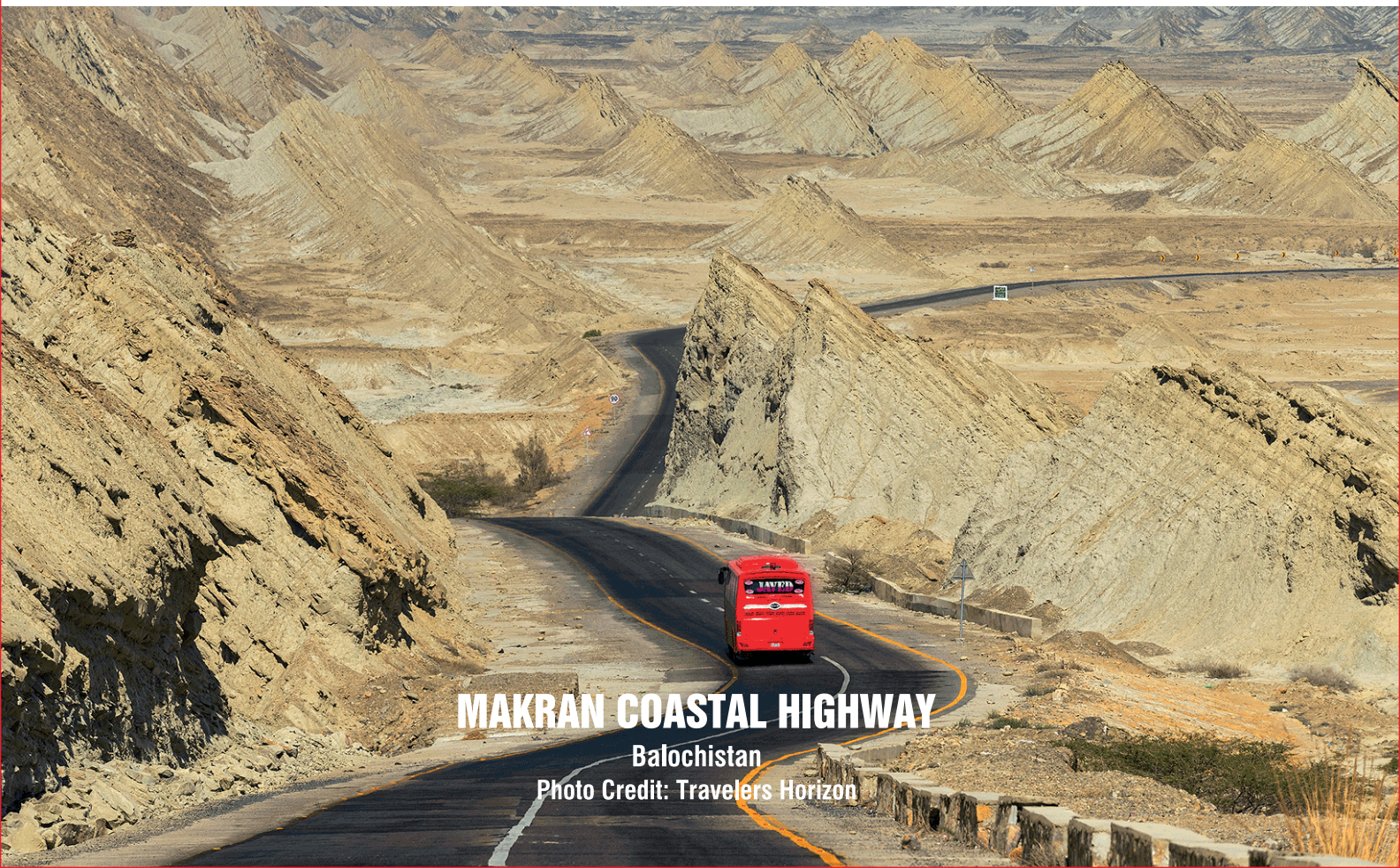
Unfortunately, despite having it all, Pakistan has not been able to take advantage of the vast economic opportunities in the tourism and hospitality sector due to the numerous challenges it has had to face since independence. The United Nations World Trade Organization (UNWTO) does not even have Pakistan on its world statistical map of economic tourism contribution (UNWTO Tourism Data Dashboard, 2021).

The domestic tourism sector of Pakistan, an over US\$100 billion industry, needs to

be prioritized. The following chapter highlights several core issues that can only be addressed by the Government through meaningful dialogue with the business community.

Spots like Bolan Pass and Gondrani, could easily become a permanent business hub for locals and the government.

The T&T Survey reveals how traveling within Pakistan is still not entirely safe, especially in Balochistan and other interior regions of Punjab. This is the reason why most only prefer to travel to popular places. While there is sufficient deployment of military in places like Skardu and along the borders with Afghanistan and India, safety remains a top concern.



MAKRAN COASTAL HIGHWAY

Balochistan

Photo Credit: Travelers Horizon



Another issue is that of routine feuds among tribal leaders. These disputes are often on property related matters and they limit prospects of business creation in many, otherwise scenic destinations. Such regions can become an excellent source for Greenfield ventures but remain in the dark today.

BAD MARKETING, LOW FOREIGN INVESTMENTS

One of the main reasons why foreign hospitality chains do not take interest in tourism in Pakistan is due to half-hearted or absent marketing attempts to introduce Pakistan to the world. There is also inadequate resources available to drive research and innovations in, for example, the execution of some of the best international practices mentioned in the document.

Pakistan also does not have a unanimously passed National Tourism Policy that has further eroded opportunity costs for setting up of businesses. Countries like the Maldives, have branded their national tourism accurately unlike Pakistan, where “it’s beautiful, it’s Pakistan”, failed to pick momentum among locals and travel bloggers due to shortsighted strategic marketing.

ONLY 28 PERCENT CONSULT TRAVEL WEBSITES: T&T SURVEY

Aside from few successful travel platforms like ‘Find My Adventure’ and ‘Pakistan Travel Places’, there are no visible efforts on part of the government in introducing high-quality and reliable travel services to the public that operate as international standards. The ones offered by the PTDC and DTS are incomplete, inadequate, and do not appeal to local masses who do not even know they exist.

Information on basic items like online hotel navigation and room bookings, availability of tour guides and transport facilities, spot restaurants and such need to be made easily accessible. The T&T Survey shows that 72 percent of the population never consult any traveling website for planning their trips in Pakistan.

INCOMPETENT TOURISM MANAGEMENT INSTITUTIONS

Tourism-related institutions are primarily formed to create awareness among the public about exciting tourism destinations. Part of their job is also to make investment-friendly policies that mobilize investments toward infrastructural development, as well as to strengthen the tourism-industrial connectivity.

However, in Pakistan, bodies like PITHM, PHA, TAAP, PATO, TDCP, STDC, and TCKP, have managed to make only marginal progress. This goes to show that these entities are in strict violation of the mandate accorded to them by the Government of Pakistan and must either be dissolved or restructured. The PTDC, till yet, has poor relations with the private sector and as a result does not have sufficient funding to sponsor 2-Star hotels. The lack of government support results in poor quality control and management of human resource and finances.

UNSKILLED LABOR AND LANGUAGE BARRIER

Poor communication skills and language barriers are a hindrance for local guides to observe or learn good hospitality services. On the other hand, skilled manpower in the hospitality and tourism sector is low. This is one of the major reasons why public spaces get easily polluted and resources get misused.



INTER-DEPARTMENTAL COORDINATION FAILURE

Tourism is a trans-disciplinary subject that is largely pertinent to ministerial departments, such as development and planning, forestry and wildlife, ecology, environment, air travel, railways, interstate highways, and even commercial attaches. However, it has become a norm for these Government Departments to operate and make decisions independently.

Currently, there is dissonance between provincial administration over the 18th Amendment. Without coexistence and combined effort, inter-department coordination will always fail in achieving the desired objectives, and tourism shall always remain a third-tier contributor to the GDP.

Lack of cogent destination management and market research practices has become a constant hurdle in way of progress and in retaining visitors for longer stays.

ABSENCE OF A CENTRALIZED DATA COLLECTION SYSTEM

There is no centralized data gathering, processing and dissemination system in Pakistan. A few years ago, the Ministry of Tourism tried to collect and maintain a unit to accumulate travel and tourism related data, but it is neither easily available nor useful for any stakeholder. There is no genuinely dedicated government department, due to which, consultants and investors often must rely on data published by other international organizations like 'World Travel & Tourism Council' that only draw conclusions based on a selected sample size.

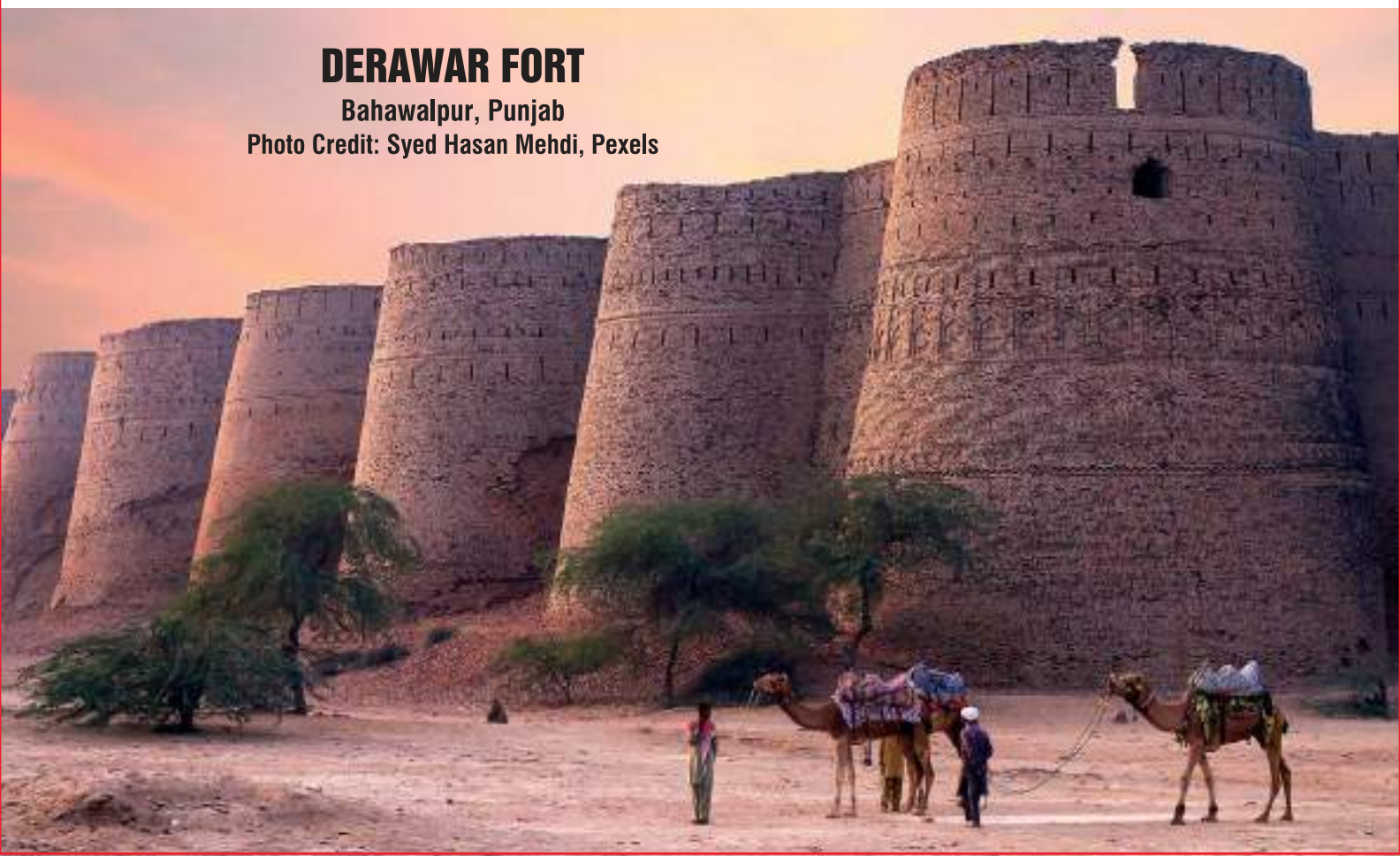
MISMATCHED HOSPITALITY STANDARDS AND PRICE STRUCTURE

Multiplicity and duplicity of taxes by federal and provincial governments, has made traveling expensive and especially with a high inflation outlook and rising fuel costs, household budget spending on tourism has squeezed.

DERAWAR FORT

Bahawalpur, Punjab

Photo Credit: Syed Hasan Mehdi, Pexels



JAROGO WATERFALL

Swat, Khyber Pakhtunkhwa

Photo Credit: Najam Bakhtawar





Often, tourist packages are overpriced in comparison and on top of this, the service provided by a Pakistani 3-Star hotel too does not match the standards offered in America and Europe. A 5-Star hotel charging US\$150 in America, for example, will offer better services than a similar 5-Star hotel in Pakistan that is charging higher and not offering standard services as it ought to be mentioned in earlier chapters.

SUBPAR HOSPITALITY TRAINING INSTITUTES

Except IoBM and few other lesser prominent institutes, diplomas and formal training on tourism and hotel management are still not given due attention. This could be because of the “waiter” mindset that has become a taboo reflective of the bourgeoisie class and as a result deterred young graduates from pursuing careers in the hospitality sector.

There are a couple of private institutes and colleges like PITHM and College of Tourism and Hotel Management that offer courses and degrees on Hospitality and Management. However, their study programs need to be updated to match international standards.

HALF-HEARTED PARTICIPATION IN INTERNATIONAL TRADE FAIRS

Participation in international fairs like Vancouver International Travel Expo and East Mediterranean International Tourism and Travel Exhibition in Turkey give useful exposure to local stakeholders.

The PTDC has been engaging in international affairs for several years now but there has not been any tangible outcome.

According to the 2019 Travel & Tourism Competitiveness Index (TTCI), India was ranked at 34th position, whereas Pakistan at 121st position out of 140 countries.

LACK OF PROPER ENFORCEMENT OF ACTS AND CERTIFICATIONS

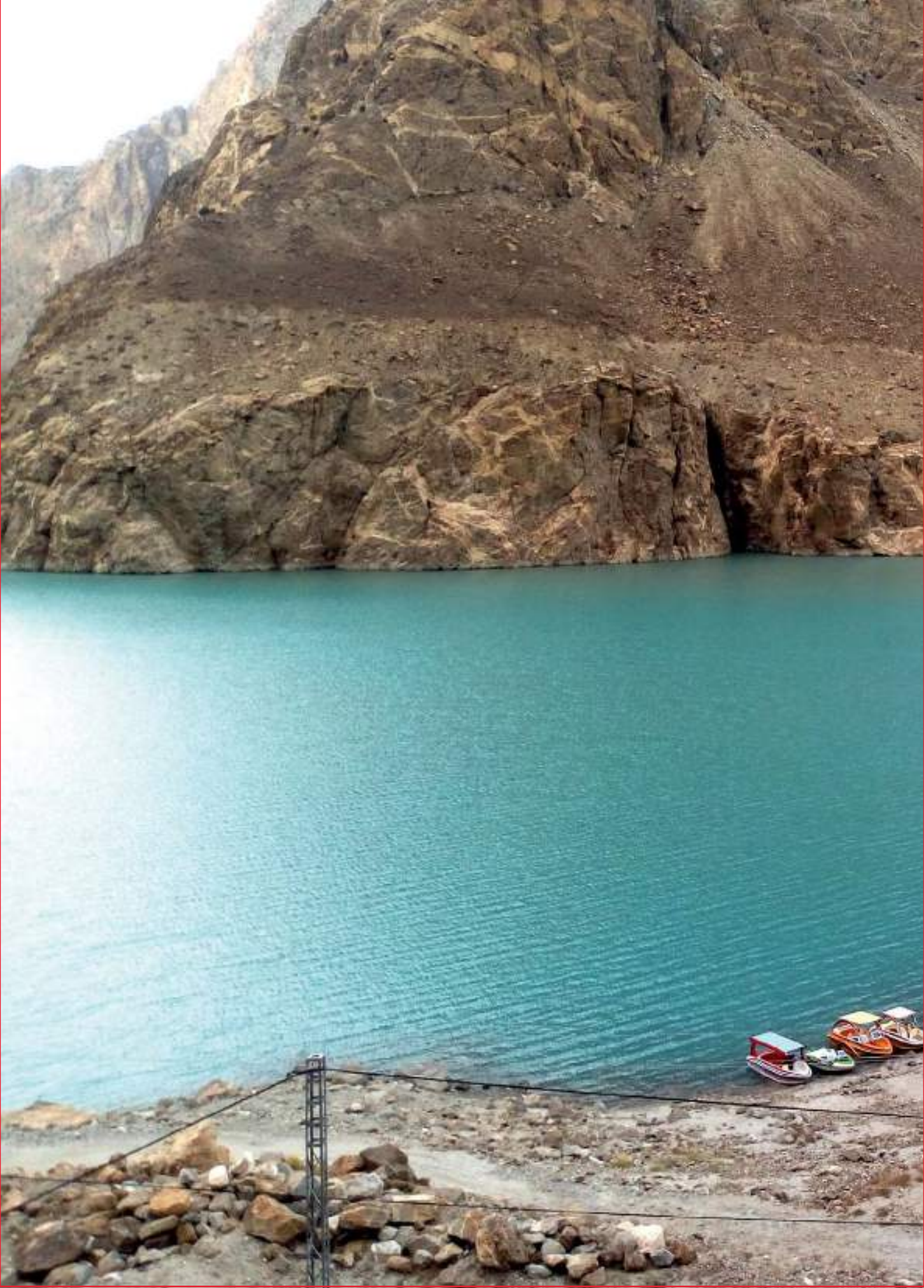
The Department of Tourist Services (DTS) is responsible for enforcing rules and regulations of hotels, tourist guides, and travel companies. The DTS used to work under the Federal Ministry of Tourism until the 18th Amendment got passed and administration got relegated to provincial levels.

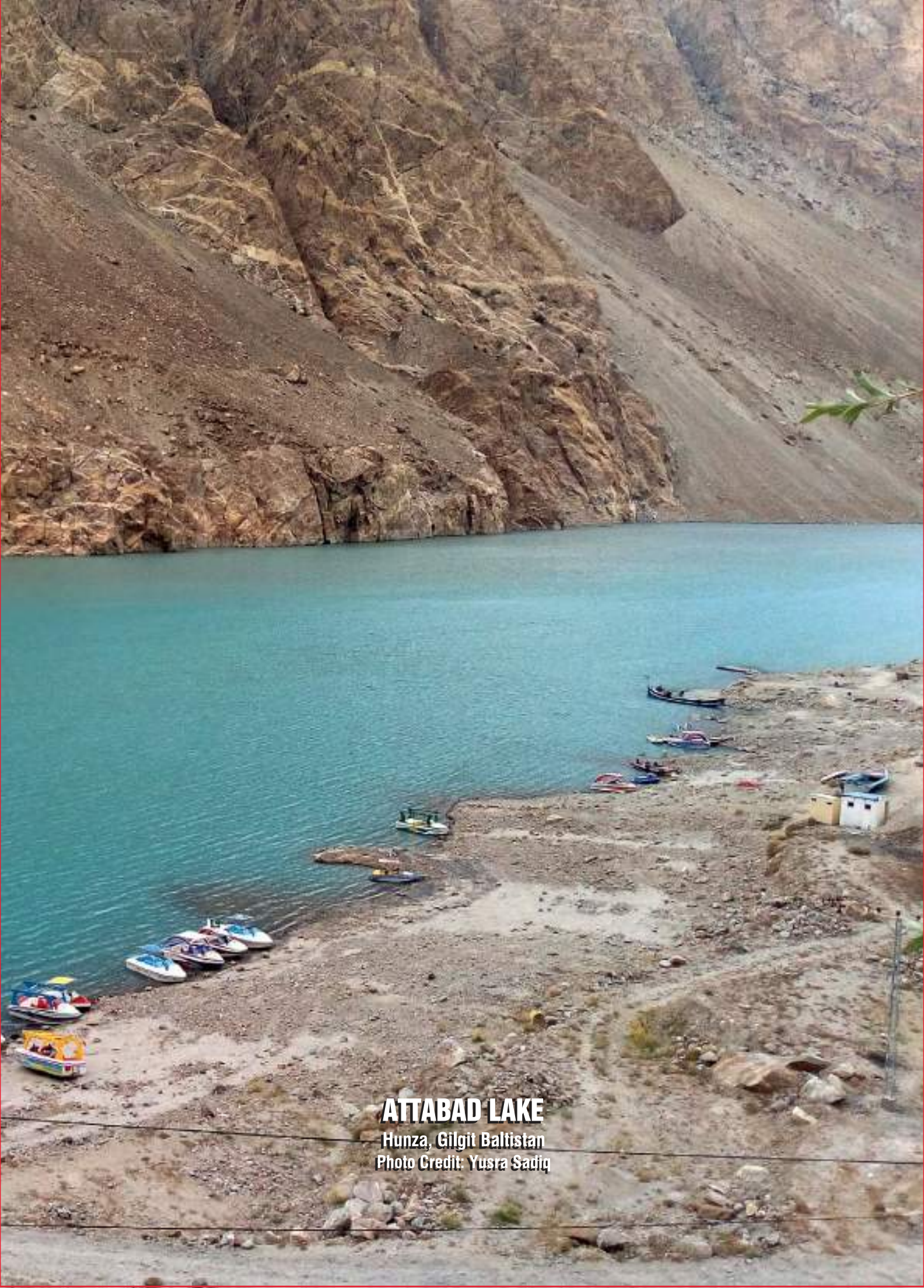
The DTS is responsible for maintaining the operational efficiency of visitor facilities by observing the following Legislative Acts:

- The Pakistan Hotels and Restaurants Act 1976
- The Pakistan Tourist Guides Act
- The Travel Agencies Act 1976

Considering the presently inferior hospitality programs, the DTS has failed to accomplish its mission. Also, there is a Star System for standardizing the level of services provided by hotels, but these requirements are generally not implemented in Pakistan.

As a result, travel guides operate without supervision and transportation business is privately run by local community members who have no safety certifications. This transport mafia then also get to choose different rates for different destination points by themselves.





ATTABAD LAKE

Hunza, Gilgit Baltistan

Photo Credit: Yusra Sadiq



SAFARANGA COLD DESERT

Skardu, Gilgit Baltistan

Photo Credit: Shuttergames, Unsplash



GOVERNMENT INITIATIVES

COVID-19 had its fair share of global economic disruptions in Pakistan and the sector that it hit the most was Tourism and Hospitality. The present Government had lined up multiple projects for execution in the year 2020 but the pandemic had all of them postponed.

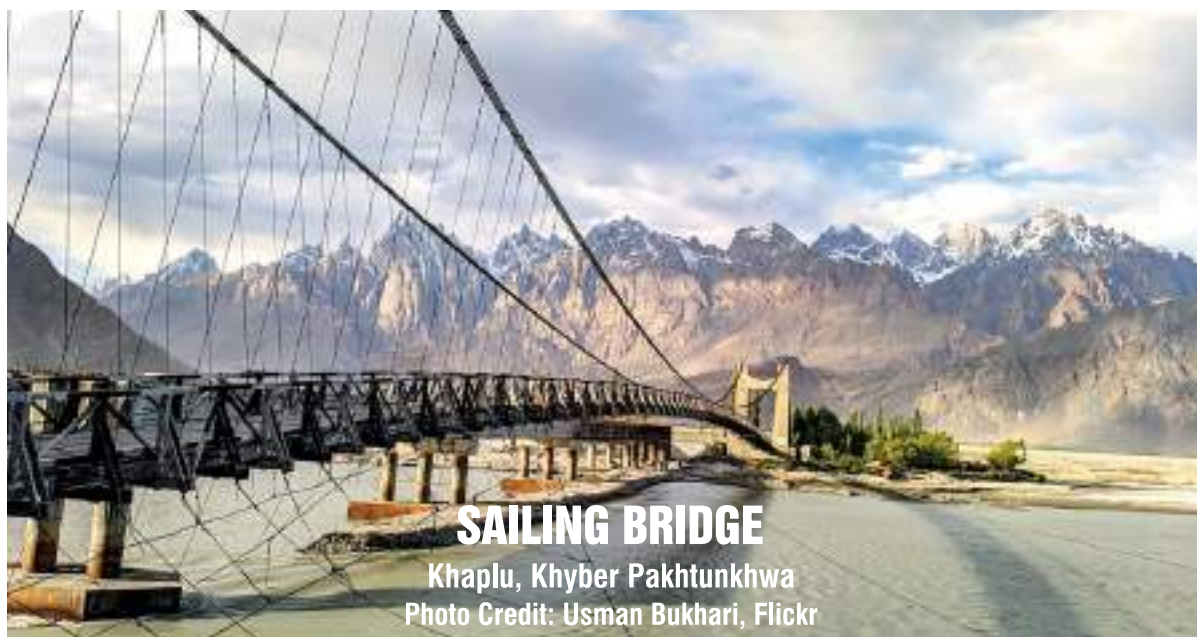
While the 2020-30 National Tourism Strategy (NTS 2020-30) is still in the process of finalization, it is imperative that all national branding programs are not only designed to enthrall the world but also the general public. All trailblazing advertisement campaigns must be holistically owned by the People of Pakistan if the sector is to be truly reinvigorated.

The World Tourism Forum 2021 planned in Pakistan by the PTDC is forecasted to generate US\$600 million through live coverage and related social media programs. If this event is successfully materialized in Pakistan, then it will bring about a paradigm shift in all efforts geared

toward achieving rapid industrialization. The NTS 2020-30 program strives to increase the share of tourism in GDP from 2.8 percent to 5 percent.

Some of the salient features of the program are as following:

1. New slogan
2. Restructuring of the PTDC
3. Leasing out PTDC properties to private hospitality companies based on a 33-year period loan settlement
4. Upgrading the existing PTDC hotels into 3- and 4-Star hotels
5. Hiring talented leaders for marketing and advertising
6. Create a centralized data management system that will track and store travel data, as well as information on traffic patterns, newly discovered hotspots, existing state of hotels, certifications, archaeological sites, pricing, etc.
7. One-window operation and tax holidays for overseas investors
8. Renovation of heritage sites and national parks



SAILING BRIDGE

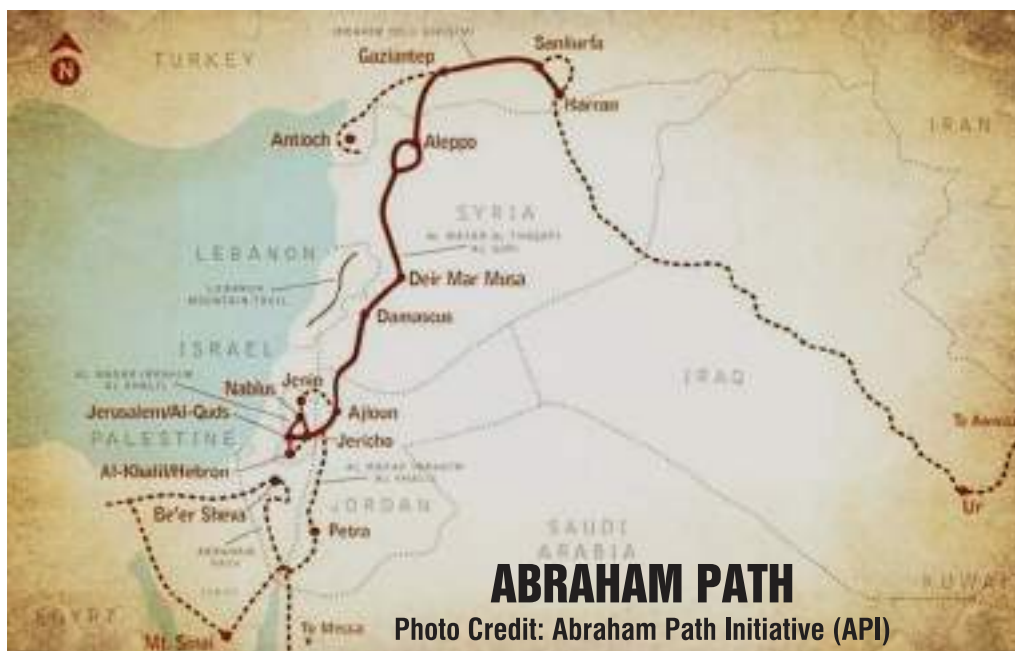
Khaplu, Khyber Pakhtunkhwa
Photo Credit: Usman Bukhari, Flickr



FROM ABRAHAM PATH TO GANDHARA HERITAGE TRAIL

The Abraham Path Initiative (API) is a non-profit organization that has been successfully engaging people of all races and religions since 2007 in its program of retracing the journey of Prophet Abraham (or Ibrahim A.S. for Muslims) that starts at Turkey and culminates at Palestine. The entire trip is covered on foot and serves the basic purpose of this initiative - connecting people of different cultural backgrounds and creating local employment.

The API covers 1,078 Km from the birthplace of Abraham (Urfa, Turkey) to his burial site (Hebron, Palestine). Travelers come across fabled historic points and get a hands-on experience at cooking local cuisines along the way.



The ‘Gandhara Heritage Trail’ of the Government can be planned along the same lines. Following are some the notable passes that the trail touches such as Takht Bahi (Madulusht Resort) in KPK:

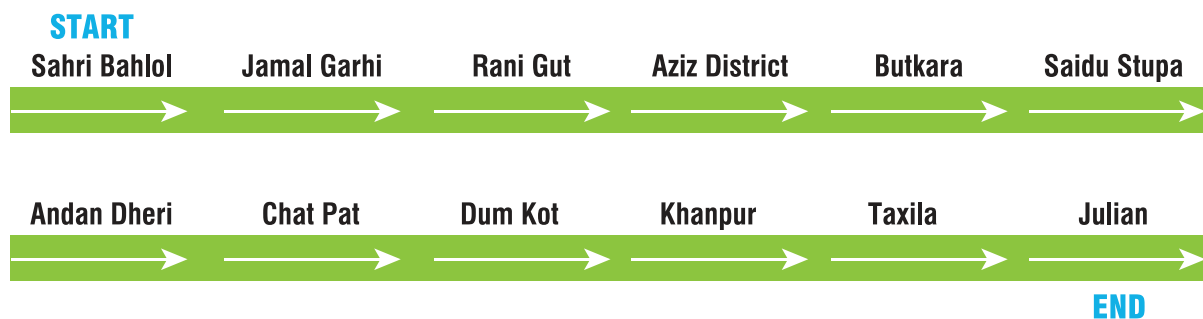


Figure 10: Starting and End Points of Gandhara Heritage Trail, GoP



TRANS HIMALAYAN JEEP RALLY (THR)

In order to replace the likes of Paris-Dhakar type jeep rallies, that have lost their charm, the Government of Khyber Pakhtunkhwa decided to divert the world’s attention toward a first expedition into the virgin Himalayan Mountains – the Trans Himalyan Jeep Rally (THR).

This initiative is by nature for those diehard road warriors who want to explore treacherous mountainous terrains several thousands of feet above the sea but at the same time, also yearn for a quality experience featuring picturesque vales and forests.

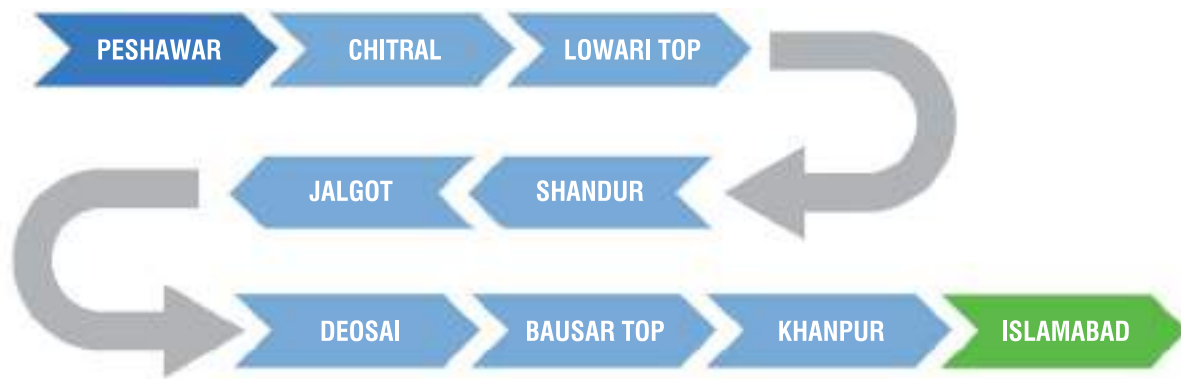


Figure 11: Trail of Trans Himalayan Jeep Rally, GoP



1.The THR contest starts from the oldest city in Pakistan, Peshawar, and concludes at Khanpur Dam, which is house to the oldest civilizations of the world, Jauliyān, and Bhamala.



2.From Peshawar, the track goes through Valley of Buddha near Takht-e-Bai then to Chakdara, where an 1897 piquet of Winston Churchill is also located.



3.The first test of endurance happens at Lowari Pass, 10,230 ft high, from where the mighty Tirich Mir is visible. Before embarking toward Jaglot, Deosai, and Babusar Top, racers will experience outstanding hospitality of the Kalasha people in the form of grand feasts of traditional cuisine along with music and fun.



4.After climbing thousands of feet up the mountains through a mix of metaled and dirt roads, drivers will reach Shangrilla Lake to enjoy more exciting tourist sites and UNESCO Heritage Sites like Ashoka Rock in Mansehra.



5.The last bit of the journey takes racers along the mighty Indus River and the Babusar Pass, touching base at Khanpur Lake and Taxila Museum before finishing off the race at Islamabad.

WHAT IS IN IT FOR SPONSORS?

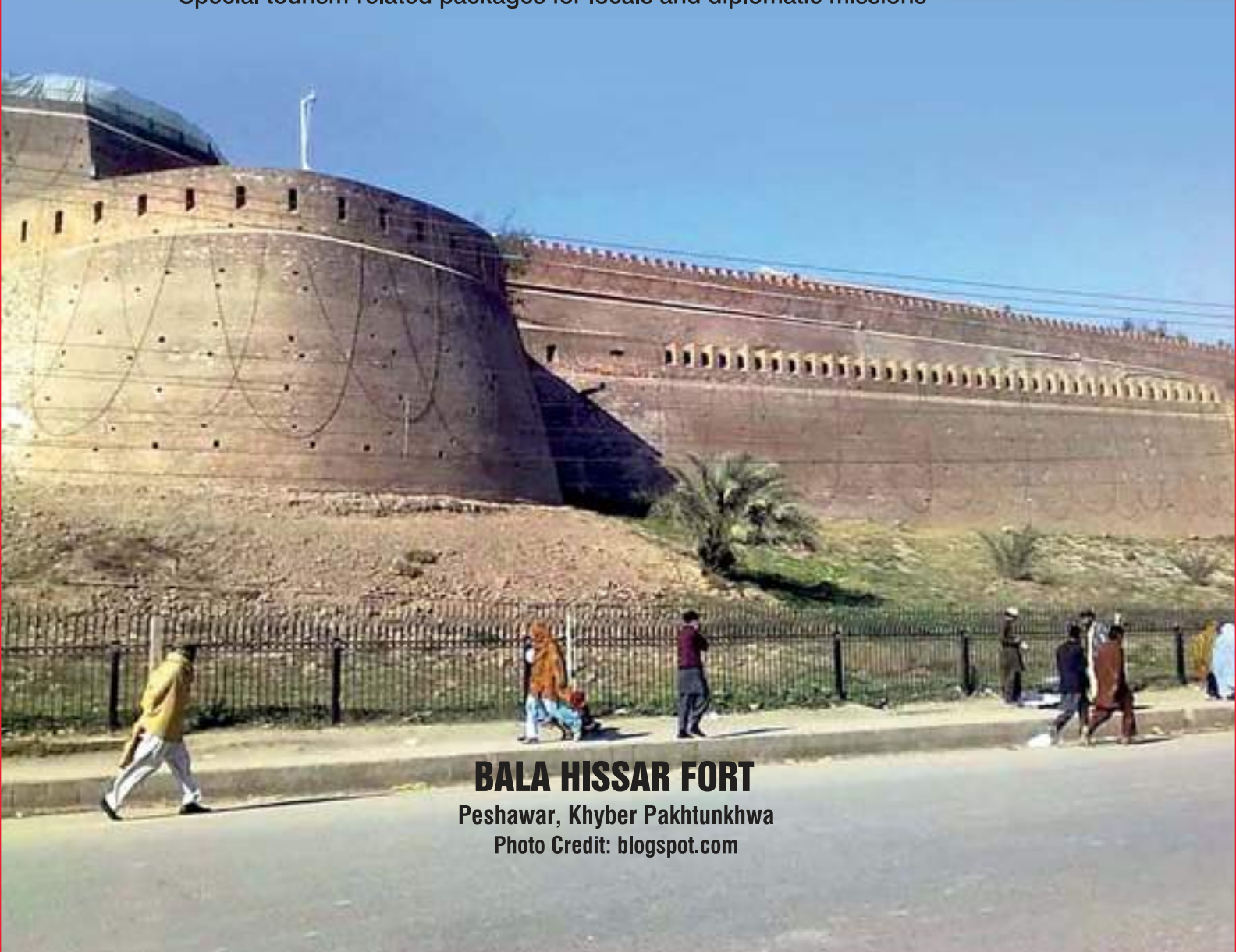
- ADVERTISING ON WHEELS
- PROMOTIONS THROUGH EVENT MARKETING
- CSR

BALA HISSAR FORT HOPPING

This fortified structure of Bala Hissar is spread over 10-acre land, at a height of 90 feet. It was built by Mughal Emperor, Babur, in 1526 after capturing Peshawar. The ancient route emanates from its main gate facing India and its wall-like ridges move along the Grand Trunk Road. It was once used as a Royal Residence for the Afghan Durrani Dynasty before being overtaken by the Sikhs in 1834, who then replaced all the bricks with mud.

The 2500 years old fort is currently under the administrative control of Frontier Corps North that is planning to make the following services available for travelers:

- Traditional cuisines that are the specialty of Peshawar
- Stories of thousands of years of history at the custom-built amphitheater
- Fort-fort hopping through heli-safaris
- Cultural folklore dance and music, especially Khatak, Chitrali, and Mehsud
- Conferences, seminars, workshops, and national day celebrations
- Special tourism-related packages for locals and diplomatic missions



BALA HISSAR FORT
Peshawar, Khyber Pakhtunkhwa
Photo Credit: blogspot.com

KHYBER AIR SAFARI

The heli service will take visitors to far-flung areas atop mountain roofs, giving them a bird's eye view of the following distinct locations:

- Chitral, Lowari Pass, Kalash, Shandur Pass, Broghal Pass
- Hazara, Galiyat, Kaghan, Naran, Khanpur Lake
- Gilgit, Hunza, Shiger Valley, Deosai Plains
- Flights over world-famous Takht-i-Bai ruins from Islamabad with a panoramic view of Malakand Pass and Churchill Piquet
- Key Buddhist Sites

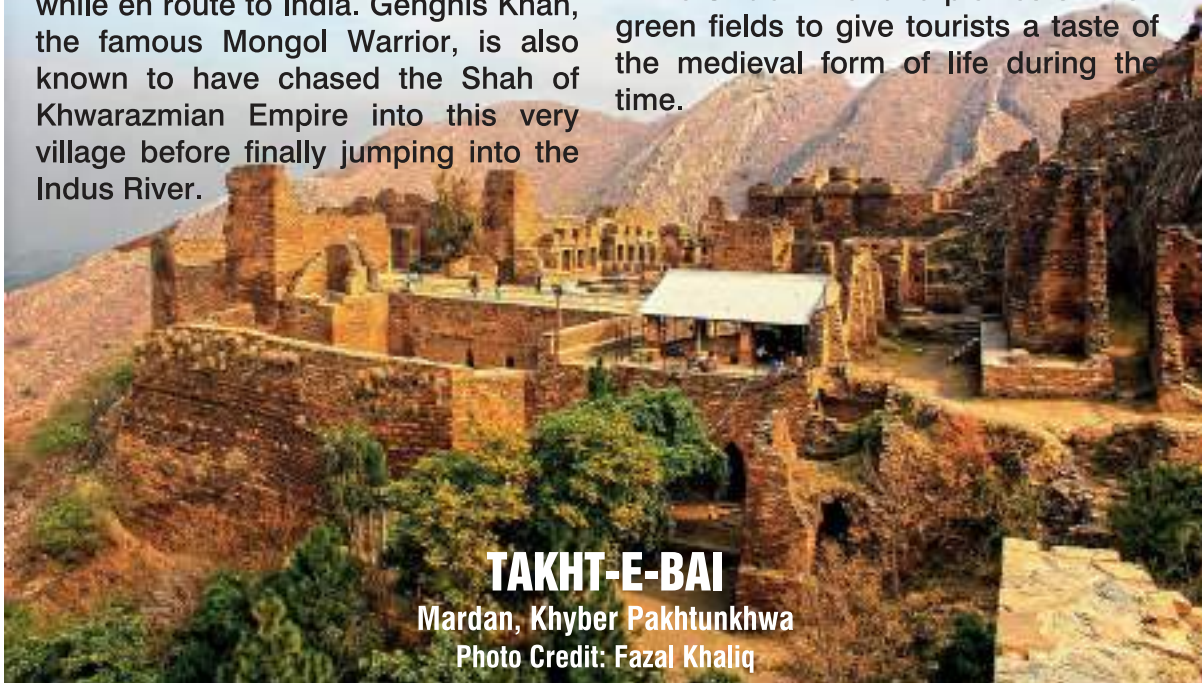


ANCIENT TOURIST VILLAGE OF HUND

The Corinthian Column, towering one of the courtyards of the Hund Village is a symbol of the 9th Century Hindu Shahi Dynasty that once dwelled here. The town is also known as the last capital of Gandhara Civilization, where Alexander the Great, spent a night while en route to India. Genghis Khan, the famous Mongol Warrior, is also known to have chased the Shah of Khwarazmian Empire into this very village before finally jumping into the Indus River.

Back in the 1580s, this small village used to serve as a gateway to India, and was encircled by a wall, most of which has been demolished to pave way for the Grand Trunk Road.

The Government has planned fishing in the Swabi River and picnics on lush green fields to give tourists a taste of the medieval form of life during the time.



TAKHT-E-BAI

Mardan, Khyber Pakhtunkhwa

Photo Credit: Fozal Khaliq





TARBELA LAKE

Haripur, Khyber Pakhtunkhwa
Photo Credit: Sohail Ahmed, Unsplash



REVIVAL OF KHYBER STEAM SAFARI

The GoP, in a joint venture with Tourism Corporation-KP and Pakistan Railways, has set its eyes on reviving the historic KP Stream Safari that will take travelers into historic travel destinations of Punjab. The existing Khyber track passes over two bridges that are in the pipeline to be reconstructed. Following are the key features:



- A Joint Venture of Tourism Corporation-KP and Pakistan Railways
- The Train Safari starts from Peshawar and culminates at Landi Kotal
- Special briefing on the history of the locality, the battles, and ancient old legends
- Cultural dances by Chitrali, Masood, and Batani troops in colorful dresses at the end of the Safari
- Display of unique Sun Watch, which is one of the only three in the world
- Live music, camel rides, games, and cuisines of ancient recipes



WATER WORLDS SPORTS AND RECREATIONAL ACTIVITIES AT TARBELA

The Government has planned to create an underwater tourist centre (like in Lanzarote as mentioned in later chapters) along the largest lake in the country, Tarbela Lake – 97 Km long.

Tarbela Lake irrigates thousands of agricultural lands and offers itself as an ideal destination for water sports and picnic, cliff diving, jet ski, speed boating, tubing, and kayaking. It can also serve as a source for 3,800 MW of electricity to the national grid.



TOURISM FACILITY IN PIR GHAYIB, BALOCHISTAN

One of the recent initiatives of the Government of Balochistan, the Southern Command and FC North, is of creating a hub of tourist attractions in Pir Ghalib. Plan includes to feature amenities like a scenic cricket ground, water slides, and a shed area where travelers can relax and admire the mystifying beauty of ancient caves of Shehr-e-Roghan, and other small huts for overnight stays.

The project promises to generate income for local communities through increased frequency of visits and overnight stays.





PROVINCE-WISE MAPPING OF KHYBER PAKHTUNKHWA



SEGMENT	TOURIST SPOT
Religious and Archaeological Tourism	Gandhara Civilization, Takht Bhai, Mangora, Kalash, Bamala Haripur, Charsadda, Jamal Ghari, Shahbaz Ghari Mardan, Saidu Sharif, Hund Swabi, Akra Mound in Bannu, Rehman Deri in D.I. Khan
Eco Tourism	Ayubia National Park, Saif UI Maluk National Park, Sheikh Badin National Park, Lulusar Dudipat Sar Park Nathia Gali, Ayubia, Abbottabad, Mansehra, Naran, Swat, Malam Jabba, Chitral White Water Rafting and Extreme kayaking in Kunhar, Kabul and Swat rivers
Adventure and Sports Tourism	Skiing, snowboarding, snow kitting, heli skiing in Malam Jabba Paragliding, hot air balloon in Mansehra, Abbottabad Traditional polo Altitude trekking and hiking in Nathia Gali, Thandyani, Naran, Kalam, Poni trekking at Saif ul Maluk

BALUCHISTAN

SEGMENT	TOURIST SPOT
Religious and Archaeological Tourism	Mehargarh remains, Nasherwani tombs, Buddhist cave city remains in Gondrani, Kot Bala, Hinglaj Mata temple near Makran
Coastal and Beach Tourism	Marine beaches and outdoor recreation in Gawadar, Jewani, Pasni, Ormara Turtle Beach, Ahsan Beach
Eco Tourism	Lal Suhanra National Park, Margalla Hills, Chinji National Park





PROSPECTIVE TOURISM ACTIVITIES

SINDH



SEGMENT	TOURIST SPOT
Religious and Archaeological Tourism	Hindu Temple in Sukkur like Sadhu Bela, Tharparkar, Panch Mukhi and Hanuman Mandar in Karachi.
Coastal and Beach Tourism	Buddhist sites at Barhamanabad (Sanghar), Sirah-jitikri near Rohri, Kaho-jo-Daro at Mirpur Khas, Sudhera-jo-thal near Hyderabad, Thul Mir Rukan Stupa near Moro Sufi Shrines of Shahbaz Qalandar, etc.
Desert Tourism	Karachi: water sports, such as scuba-diving, sea kayaking, yachting, sailing, surfing and beach resorts. Tharparkar and Nara Desert

PUNJAB

SEGMENT	TOURIST SPOT
Religious and Archaeological Tourism	Sikh Gurdawara in Hassan Abdal, Katas Raj Mandar Chakwal, Nankana Sahib, Sheikhpura, Kartarpur, Sufi Shrines of Multan, Lahore, Pak Pattan, etc., Gandhara Civilization, Budhist remains in Taxila, Julian University
Desert Tourism	Cholistan and Thal
Eco Tourism	Lal Suhanra National Park, Margalla Hills, Chinji National Park
Adventure and Sports Tourism	Murree Hills, Fort Munro, Thal and Cholistan Desert, Kalar Kahar: low and high altitude trekking and hiking, mountain biking and motor biking, paragliding, hot air balloon, camel safari, and desert safari



GILGIT BALTISTAN

SEGMENT	TOURIST SPOT
Religious and Archaeological Tourism	Kargah Budha, Manthal Budha Rock and other rock carvings and inscriptions of Buddhist civilizations in Chilas, Gilgit, Hunza, Danyore, Shital and Konodas
Desert Tourism (Jeep Safaris and Forts)	Skardu Sarfaranga, Katpana Cold Desert
Eco Tourism	Deosai, Karakoram, Hunza, Khunjerab (Markhor, Marcopolo Sheep, Snow Leopard, Marmot, Musk Dee, Ibex, Blue Sheep, Yak watching)
Adventure and Sports Tourism	Murree Hills, Fort Munro, Thal and Cholistan Desert, Kalar Kahar: low and high altitude trekking and hiking, mountain biking and motor biking, paragliding, hot air balloon, camel safari, and desert safari



KATPANA COLD DESERT

Skardu, Gilgit Baltistan
Photo Credit: Wikimedia Commons



POLICY RECOMMENDATIONS

For local communities in developing countries like Pakistan, tourism is often the only source of income. To truly harness the innate forte of this highly potent sector, several measures can be adopted to transform the sector into a real driver of employment creation and socio-economic advancement.

A good national tourism policy should include tax incentives for investors and ensure that all initiatives encourage local participation and add value to towns in terms of job creation, preservation of national heritage points, and conservation of natural resources. Emphasis should be on bankable projects with a nice blend of education and employment opportunities. Government bodies should induct members from law, banks, engineering, civil service, and community leaders who can execute routine workshops to enable faster adoption of the following recommendations.

1. CREATE A BRIDGE OVER TARBELA LAKE, DARBAND

Across both sides of Tarbela Lake, lies a village called, Darband. The villagers are only able to get to the other side using boats when the tide is low, otherwise it is nearly impossible. The boatsmen charge Rs 800, as per locals, and it takes approximately 30 minutes to travel.

For decades, locals have been appealing local government to construct a bridge to save their cost and time. This will also create an opportunity for farmers to add more variety into crop production, and the bridge will enhance engagement between farmers and retailers that will in turn drive up income generation.

Bamboos can prove to be ideal in constructing the bridge, given its endurance, strength, and appeal.



Proposed Bamboo Bridge



2. ENHANCE SHARE OF PRIVATE STAKEHOLDER SHIP

PTDC, TCKP, and TDCP own several of luxury hotels, restaurants, and transportation services. Regretfully, all these companies have digressed from their original purpose of serving for the reinvigoration of the tourism sector, due to business growth and profit maximization motives.

It is therefore suggested that the incumbent Government concentrates on formulating policies that intrinsically compel the private sector to function at their optimal level by maintaining internationally set hospitality standards and by observing all rules and regulations. It is only then investments can be mobilized into the developing the tourism sector.

Many countries, where tourism is flourishing, have done so by promoting public-private collaborations to better address the bottlenecks and to create fiscal space for utilization of new capital. This works to tackle the many limitations accrued to the execution capability of governments and guarantees a more productive use of funds. Public private partnerships are the only way forward if heritage sites and prized tourism destinations are to be managed and activated.

3. CERTIFIED HOSPITALITY TRAINING FOR YOUTH

To upscale participation of the private sector, a task force should be formed under the patronage of the honorable Prime Minister. This group should be assigned to holistically gauge if the desired level of capacity building programs are being conducted for communities in each destination.

The task force can recruit consultants from the business community, as well as

partner with UN and other donor agencies to acquire access to grants, logistics, and technical support to realize tangible outcomes. Through these efforts, not only will the Government succeed in involving a great number of young professionals into the hospitality sector but also expand the horizon of successful public-private partnerships.

The task force should fulfill the following objectives:

- Create optimistic projections of employment
- Trigger a series of business ventures with high performing corporate executives
- Encourage women to take part in hospitality

Garner attention of foreign consultant agencies to train local communities, as well as promote competition in the labor market.

4. MONITOR OVER THE CEILING PRICING OF TOURISM OFFERINGS

Discrepancies like doubling the price of accommodation and transport and maintaining different rates for foreigners and different for locals, have always discouraged visitors.

By warranting a price structure that reflects inflation and the standard offering, tourism facilities will appeal to various social groups and all year round.

5. REPLICATION OF KP TOURISM POLICE SYSTEM IN BALOCHISTAN

For volatile regions, where some of the most stunning sites are located, it is imperative to maintain law and order system. Balochistan and interior areas of Sindh host several undiscovered spots that carry inherent cultural significance but due to routine feuds among local tribes



and uncertain political situations, many domestic travelers avoid visiting them.

Places like Shehr-e-Roghan, Tharparkar Desert, Hazarganji Chiltan National Park, and Takatu Mountain carry promise to generate vital tax revenue.

The idea of tourism police has already taken shape in both physical form and toll-free helpline services offered in various languages. The entire system of the KP Police is laden with surveillance cameras, and other similar steps to safeguard visitors from any kind of threats.

However, one drawback of this system is the absurd travel restraints that apply only on foreigners. This should be replaced with a friendly-for-all administrative system that is applicable to locals as well. For trekking and mountain climbing expeditions, licenses could be granted after an initial screening test to check for competency instead of catering only to a selective lot.

Often, there are reports of visitors being insulted and harassed by the hands of locals at tourism authorities. To resolve these concerns, the government should implement the 'Tourism Police' model of KP in all major tourism destinations.

TELCO can approximate location of each mobile phone user at any given time. This technology can be helpful in giving a fair indication of frequency of visitors in a specific location.

FREE WIFI can help track the number of check-ins at a particular destination.

TRAFFIC SENSORS can be placed at points inflow and outflow of vehicles to estimate the number of visitors.

APPLICATION PROGRAMMING INTERFACE (API) can be used to create ecosystem for each new entrant in the tourism sector: hotels, restaurants, tour

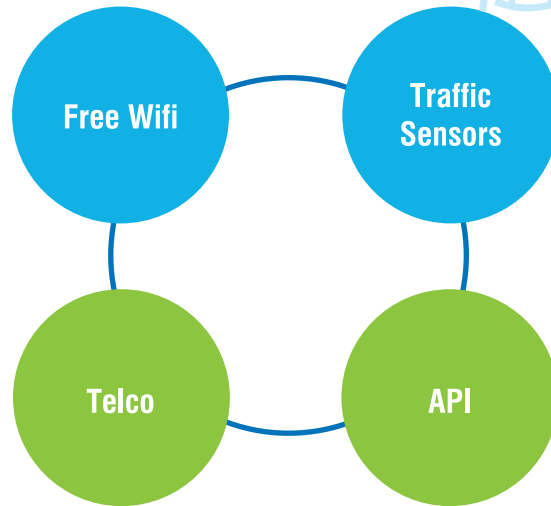


Figure 12: Using Traffic Data to gather Frequency of Visits, JumpStart

operators, wilderness camps, museums, airlines, etc.

Pilaat Bhagat Mandir located in Multan, is a holy site for Hindus, where they occasionally celebrate 'holi' - an important Hindu festival. Back in 1992, the temple was demolished out of vengence for the demolition of Babri Mosque in India and has since never been reinstated. There are countless other examples in Multan, like the Suraj Kund Mandir that need restoration. United Nations was approached to resolve this matter, but nothing has been done so far about it.

Provincial tourism departments should, therefore, draft strategic plans in coordination with relevant agencies and departments, get them approved by the Government and then timely execute them. The plan must be foolproofed to safeguard destination from any kind of environmental degradation. Moreover, appropriate guidelines should be set for involved stakeholders, especially the builders and developers, in line with the international best practices mentioned in later chapters.





RAINBOW LAKE

Minimarg, Astore Valley, Gilgit Baltistan
Photo Credit: Asad Sheikh



6. HERITAGE PRESERVATION AND ENVIRONMENT PROTECTION

Conservation of natural habitat like black bears in Juniper Forest at Ziarat and preservation of forests are key enablers of community-driven tourism development in the long run.

Pakistan has natural and heritage points that carry outstanding potential for religious tourism, especially in holy places like temples of Jaini, Buddhist, and Sikh people. Due to their deprived states, these sites should receive priority attention from the state and private sector, so they are noticed by local enthusiasts. The Atma Ram Temple in Gujranwala, which is a temple for Janini people and now turned into a warranstan, has most of its bricks taken away by homeless locals.

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7. FULLY EQUIPPED NATIONAL TOURIST WEBSITE

Many countries have keenly pursued integrated marketing strategies that focused on comprehensive analysis and data collection on prospective visitors, their tastes and purchasing power, etc. To truly widen the scope of domestic tourism in Pakistan, it is important most of the advertising of both newly discovered and existing hotspot destinations be promoted digitally. For this, bloggers, radio, tv channels, and travel authors are the best bet to enhance coverage and visibility.



KACHURA LAKE

Skardu, Gilgit Baltistan

Photo Credit: Bilal Qasim

A good website must be traveler-friendly, comprehensive, and up to date. It should showcase the following information in the most aesthetically appealing way possible:

SECTION	CONTENT	FEATURES
Basic Information	Suggested Budgeting	Routes of air, rail, coach, bus, and taxis A flexible budget calculator with transport costs Prices of all travel-related essentials per location
	Destination Traits	Cultural advice: dressing style, greetings, accustoms Guidelines on public and regional holidays Operating hours of businesses (cafes, restaurants, etc.) Weather conditions Availability of public toilets Quality of seawater, ski slopes, surfing conditions Traffic information Ongoing projects
Destination Branding	Themes	Local culture, Culinary specialties Festivals Sporting events Record of past and scheduled conferences Other
	Recreation Opportunities	Noteworthy regions near the desired destination Urban centers Hiking trails, tunnels, cliffs, ravines, bicycle tracks Natural assets: deserts, beaches national parks, lakes, bird sanctuary, prominent animals Pilgrimage points
	Attractions	Historic sites, cultural events, spas, national parks, etc Recreational opportunities for different age groups Shopping places, souvenirs, handicrafts, etc. Dining places, entertainment zones, etc. Free tours (hiking, gastronomy, jungles) Paid tours, local excursions, local guides, etc.
Accommodation and Amenities		Guesthouses, huts, resorts, motels, hotels, etc. as per ratings Camping points

Table 9: Proposed Design of National Tourism Website

NEAR KHUNJERAB PASS

Gilgit Baltistan

Photo Credit: Karan Bhatia, Unsplash



8. PLAN WITH INTER-PROVINCIAL COORDINATION

Many countries have set up powerful inter-ministerial/departmental cooperation structures at all federal, district, and provincial levels to ensure synergies in the planning and execution of national tourism policy.

A dedicated tourism cell in the Ministry of Inter Provincial Cooperation Division should be created to regularly check for loopholes in communication channels between federal and provincial governments. This will build specialized and sector-focused institutional capacity to tackle all relevant regulatory and policy concerns.

9. CREATE ACCESSIBILITY WITH COMMUNITY LEADERSHIP

If accessing a place is difficult, then people will generally tend to avoid traveling there. The existing state of infrastructure in Pakistan, today, is not very encouraging for locals to save extra to visit unconventional locations.

The Chinese constructed the highest mountain highway for Pakistan, and the tunnels of Chitral by the Japanese. Yet, there are terrains, for example, the route to Kumrat or Moola Chotak where there is no road. With the construction industry booming ahead in Pakistan, it is a good time to engage builders and developers in investing in the much-needed infrastructure like roads, rails, airports, bridges, etc.

Instead of allocating it from PSDP Funds, public-private partnerships, and foreign investments in the CPEC project may be a better-suited option. Free international consultants from institutions like PUM Netherlands can also work on creating cost-effective methods to manage waste and to design the location-wise infrastructure.

Community leaders should be taken into confidence during all planning stages, as suggested in the later chapters, so they can in turn educate their people about the importance these initiatives in creating livelihoods.

10. HIRE DMOS TO RESHAPE AND REBRAND LOCATIONS

The DMOs have a unique capability to support domestic tourism development in destinations that are under-developed yet highly potent in terms of attracting tourists. They play a leading role in facilitating the bridging of gap between private and public sectors and in making sure that mutually beneficial decisions are made.

The DMOs rely on cohesive and collaborative networking system to design strategies and drive integration of supply-chains of all allied industries like hotels, travel agencies, tour guides, restaurants, and external sectors like textile, logistics, etc. as highlighted earlier. Accredited DMOs in the world like Chicago Southland CVB, Greater Green Bay CVB and Los Angeles Tourism & Convention Board generally share the following traits:

- They independently operate without the intervention of authorities
- Are formed with the aid of public, private, academia, and non-profit regional stakeholders
- They have an Executive Board only
- Make comprehensive, detailed, and pragmatic set of regulations and by-laws
- All income is sourced from memberships, hotel taxes, online bookings, ads, website, seminars, etc.



11. CELEBRATE FESTIVALS WITH CAUTION INSTEAD OF BAN

For a vibrant country like Pakistan that has limited breathing space due to political constraints and border tensions, celebrating festivals that lighten the atmosphere, is important.

Cultural celebrations are a major source of attraction for tourism, and we do not have any other than the ones that are celebrated as custom, like Eid. Basant is one of those rare spring festivals where people fly kites and eat flavorful ice-creams. However, because there have

been cases where a metallic spring is used, it got banned completely. Instead, it could be made safer and continued to be celebrated with relevant SOPs as is done internationally in Europe and America.

Often in Pakistan, locals do not take responsibility of executing recreational safely. For example, they fire bullets in the air, and host private parties where alcohol is served, which is banned in Pakistan.

These issues need to be addressed because cultural festivals are a major source of revenue generation.

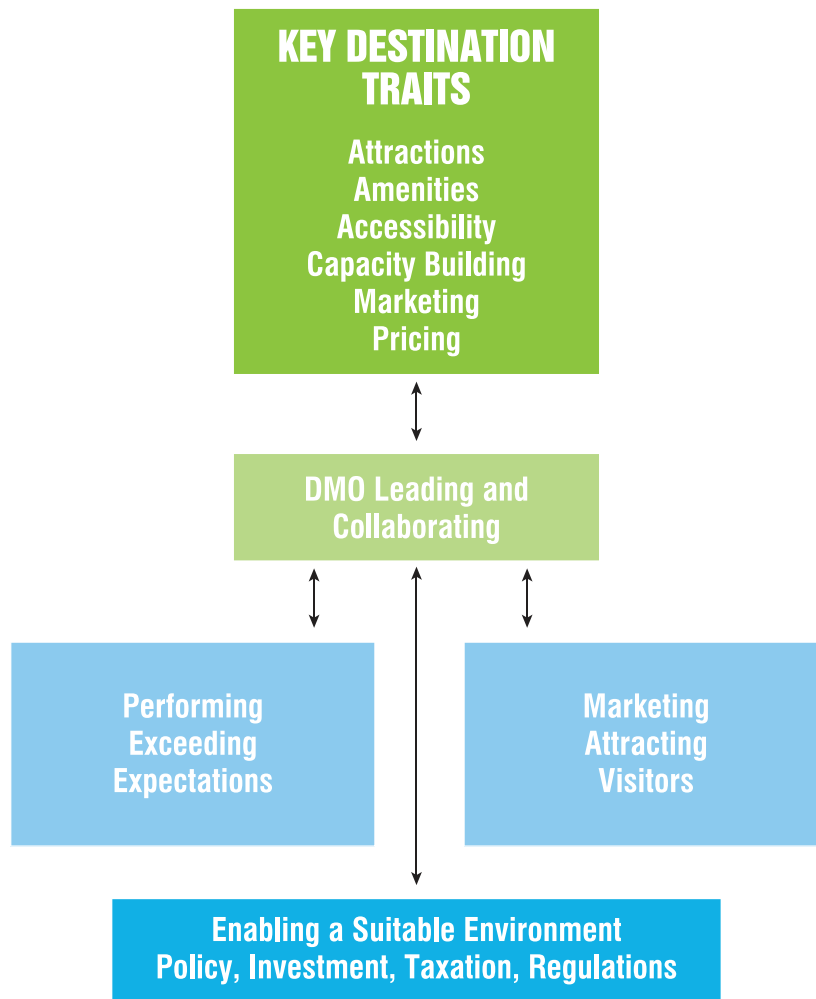


Figure 13: How Destination Management Operators (DMOs) Function, USAID



MALDIVES 4TMP TOURISM MASTER PLAN

In 2012, the Government of Maldives earned worldwide recognition for launching its final in a series of four infrastructural development plans to mitigate negative environmental impacts.

Following are the features:

- **Nationwide transport access**
- **Affordable housing**
- **Quality healthcare**
- **Prevention of human trafficking**
- **Comprehensive market research to understand general preferences of visitors with promotional efforts driven by ads, promos, fairs, creative agencies, etc.**



MALDIVES BEACH

Photo Credit: Unsplash



ASHVILLE
North Carolina, USA



BEST INTERNATIONAL PRACTICES FOR SUSTAINABLE TOURISM DEVELOPMENT

The following compendium of successful tourist development models (USAID, 2013) have been carefully drafted to provoke decision-makers and industrialists to start pondering on the various possibilities of untapping investment opportunities in different destinations in Pakistan. However, it must be duly noted that is only through a well-positioned Public-Private Partnerships program that these best international practices can be executed to mobilize resources and the allied industries to generate employment for local communities.

BUILDING TOURISM FOR AN INDUSTRIALIZED PAKISTAN

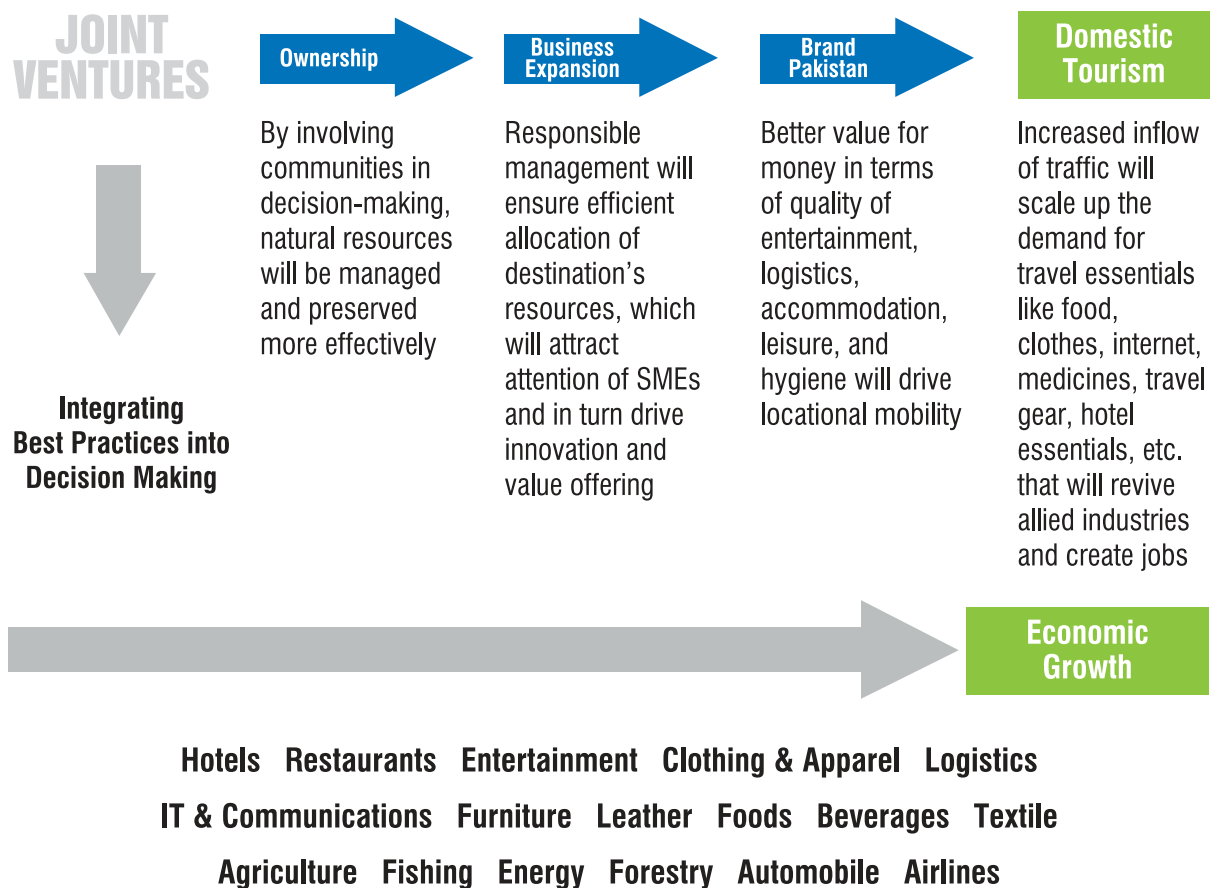


Figure 14: Achieving Economic Growth through Domestic Tourism: T&T Survey



GREEN SUPPLY CHAINS LJUBLJANA, SLOVENIA

‘Enhancing share of locally produced goods in hotels’



Location:
All across Pakistan

BACKGROUND

In a bid to integrate locals into supply chains of hotels and restaurants, the city government of Ljubljana, Slovenia made it easy for stakeholders to procure 100 percent fresh farm produce. These include seasonal vegetables, fruits, meat, and other commercially available consumer durables like beverages, chips, biscuits, etc. This initiative is named, “Green Supply Chains” and was a joint venture of Ljubljana Tourism Jarina Rural Development Cooperative, Municipal Department of Rural Development and an NGO called Good Place.

SDGS PILLARS ACHIEVED

Sustainable Economic Growth: Expensive edibles produced and often imported by large multinational corporations to serve local communities were instead grown locally, which improved the quality of tourism offering as well.

Reduction in Poverty and Unemployment: Farmers got integrated into supply chains of big hotels, which built their confidence in inviting the visiting tourists to their farms. This enriched the traveling experience, and generated income.

Environmental Protection: With goods now being produced locally, lesser fuel was burnt from transportation. The daily food wastage also fell as now procurement was aligned with daily projected demand.

The Green Supply Chains Project was a great success because it involved local participation and helped preserve the environment.

KEY TAKEAWAYS

- i. Local cooperatives served as a proxy to link stakeholders with farmers.
- ii. Better dealing through systematic and simplified negotiation of prices that benefited both buyers and suppliers.
- iii. Investors from other areas did not have to undergo complex documentation procedures to set up farms.
- iv. The intermediaries acted as quality control managers that ensured high standards of production for hotels and restaurants. Several training sessions and workshops and certifications were awarded.



FARMER'S MARKET LJUBLJANA

Slovenia

Photo Credit: BTC City Ljubljana



DASHOUR WORLD HERITAGE SITE FOR COMMUNITY DEVELOPMENT, EGYPT

Location:
**UNESCO Sites and
National Parks of
Pakistan**

**‘Employment generation through
preservation of historic sites and
its surrounding ecosystem’**



BACKGROUND

This project was a joint initiative of the Government of Egypt, ILO, UNESCO, UNIDO, UNWTO, and UNDP. The objective was to achieve rapid revenue generation by involving women and the youth up to the age of 35. The officials laid special emphasis on the developing locally run MSMEs and linking them with microfinance schemes and provided them free technical counseling on how to shepherd their businesses.

With one of the biggest international donor agencies and national cultural heritage protection institutes running in parallel with the Government, the initiative managed to effectively preserve natural heritage sites. The initiative actively engaged with local communities and pulled brownfield investments from tourism stakeholders.

SDGS PILLARS ACHIEVED

Sustainable Economic Growth: With a taskforce comprising women and young minds, several ideas on small businesses

connected with handicraft, weaving, culinary, recreational, etc., emerged. These ideas were materialized under tourism development programs run by local NGOs with the free assistance of international organizations, and grants from the federal government. Some of these products are today even being exported to markets in the region and around the world.

Reduction in Poverty and Unemployment: The program created 900+ full-time permanent jobs that continue to grow even years later. Priorities were defined by the Local Economic Development (LED) Forum that was formed with handicraft manufacturers, designers, tour guides, and event organizers.

Environment Protection: Following the publication of the environment quality assessments of the Dashour Lake, environmentalists got the area labeled as ‘environmentally managed’. They designed a framework that served to protect the biodiversity of the surrounding

forests and the natural habitat. Expert consultants were hired to deliver regular training modules on solid waste management and how locals can earn through eco-tourism businesses.

Driving Cultural Diversity, Norms, and Customs: Dashour is located in the enclave of Memphis Necropolis, which is one of most archeologically important sites on earth. Hence, the idea of cultural development was intrinsically reinforced in the entire initiative and spread across a massive radius to include palm groves and the Dashour Lake itself. Education was provided to manage and conserve archeological sites. Women were inducted in weaving local costumes, and university students organized cultural events to highlight traditions and folklores to draw the attention of travelers from other parts of the country.

Inculcating Sense of Peace and Security through Openness: Dashour

used to be a 'closed' region, where locals avoided foreigners due to biases concerning differences in religion, ethnicity, and caste. By involving women in training and teaching foreign languages to locals, the area started to beam with foreign travelers.

KEY TAKEAWAYS

- i. Three major roads were constructed in Dasour with the help of Ministry of Tourism that allocated USD 3 million for the development and availability of basic infrastructure and amenities for local communities. Another USD 250,000 was drawn from the private sector in building a 'Visitors Centre' and two eco-lodges.
- ii. Skill development, awareness sessions, and hospitality capacity- building trainings were provided to a record 3500 women and passionate young men working in different sectors.



PYRAMIDS

Egypt

Photo Credit: Ellys Utami



GLOBAL HIMALAYAN EXPEDITION (GHE), LADAKH, INDIA

‘Creating livelihoods in remote mountainous regions through electrification, transportation, and preservation of heritage’

Location:
**Remote regions of
Pakistan less
frequently visited by
tourists**



BACKGROUND

The GHE was founded by Paras Loomba of Ladakh (GHE, 2020) to make electricity accessible to communities in the Himalayan Range by using tourism as proxy. When tourists began to slowly flock in the shanty and hidden regions, a cycle of income generation took shape.

Each tourist expedition was restricted to groups of 15-20 and for each group, an exciting itinerary was planned. The itinerary was planned after a thorough survey of local communities and sites. From each community, one local leader was picked and then demand for electricity was assessed. The initial revenue through expeditions was invested into installing solar panels and other electricity generation setups.

SDGS PILLARS ACHIEVED

Sustainable Economic Growth: This simple ‘tourism for electrification’ venture experimented on a sample of 20 villages. The free access to electricity enabled small businesses to increase production

timings, which led to an increase of USD 45,000+ in the average annual incomes of locals.

Reduction in Poverty and Unemployment: New job roles were created for community members, such as porters, chefs, trek guides, organizers, and storytellers. The additional income and the successful surge in travelers cut down unemployment by more than half.

Driving Cultural Diversity, Norms, and Customs: The newly illuminated ancient temples and caves lured local tour operators who went on to feature them in their marketing packages. The additional revenue through these rare visits is today used to maintain the destination.

Inculcating Sense of Peace and Security through Openness: The new streetlamps and the glowing cafes encouraged locals to sit together and discuss business opportunities and longstanding challenges of their villages. Children can now study till late in the evenings too.

KEY TAKEAWAYS

- i. The Global Himalayan Expedition created employment for over 120 villagers by providing them free access to electricity and by discouraging them from using of kerosene. The GHE empowered several female entrepreneurs to successfully run their motels on solar energy.
- ii. The GHE was dependent on on-ground liaisons with village leaders to meet the challenges of accessibility to basic infrastructure and logistics.
- iii. The villagers were involved in every stage of development and worked diligently with the local NGOs. For tourists, special care is taken in providing them with good food and comfortable stay to make sure they visit again.



Photo Credit: IEEE Capture

ELECTRIFYING VILLAGES
CONNECTING REMOTE REGIONS
CONSERVING HERITAGE
DIGITIZING YOUNG MINDS
READYING LOCALS FOR MEDICAL EMERGENCY



IMPACT TOURISM

Figure 15: Ladakh Model of Transforming Remote Regions



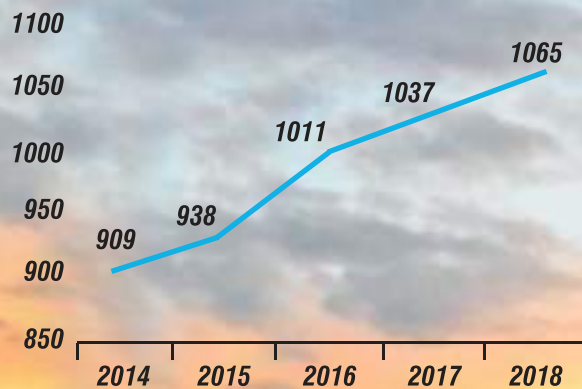
Photo Credit: UIAA

CROATIA SPENDS ON ROOMS

‘Investing in room management and guest services hotels has been the constant practice of Croatian Government to attract tourists’

Tourism sector of Croatia contributes to almost 20 percent of GDP mainly through overnight hotel stays. In 2018, a total of 110.3 million room stays were recorded by the visiting 18.4 million foreigners.

Remarkably, 10 of the world’s heritage sites are based in Croatia, alone. For example, the famous UNESCO site, the Cathedral of St James in Šibenik.



Graph 3: Growth in Number of Hotels in Croatia, 2018 WTTC Report

Croatian Government has invested a significant portion of development budget in diversifying tourist products and renovating 2-Star hotels that run by locals themselves.

ST. JAMES CATHEDRAL

Sibenik, Croatia

Photo Credit: Alex Tamas

KUMARAKOM RESPONSIBLE TOURISM INITIATIVE, KERALA, INDIA

‘Building Capacities of Local Communities to Enable them to Effectively Participate in Regional Tourism Activities’

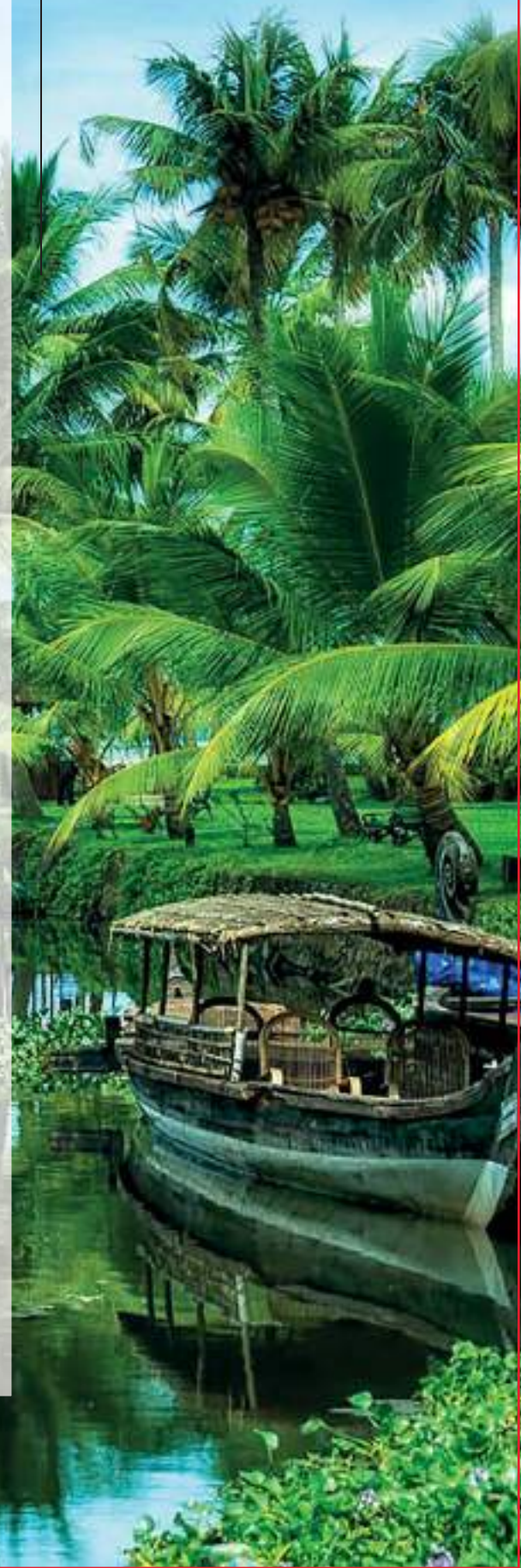


SDGS PILLARS ACHIEVED

Sustainable Economic Growth: The Responsible Tourism Project (RTP) pushed boundaries, created linkages with 33 microenterprises, and generated incomes for 450 farmers through rapid cultivation of vegetables. The entire effort benefited 2500 locals in monetary terms.

Reducing Poverty and Unemployment: Labor Directories were created that featured skill-wise chapters and training modules mentored by world-renowned consultant firms. These were tailored to meet the capacity-building needs of locals so they develop the skills needed to serve tourists. The program also brought traditional artwork and other handicrafts to light that enthuse visitors today.

Location:
Rural Areas of
Pakistan





Environment Protection: Since the entire project is themed on widening the scope of responsible tourism, preserving ecosystem became an inherent part of it. The participating farmers and locals began sowing seedlings of different varieties of mango trees on regular basis and even cultivated fish and lotus in idle ponds to diversify their offerings to hotels and restaurants. Touring the village on bicycle became a top trend that helped reduce carbon footprints of tourists. A Waste Management Committee was formed to install sewage treatment plants and pipes that were connected to homes in the area. Even, a bird sanctuary was created to protect wildlife.

Inculcating Sense of Mutual Understanding and Peace: The program was so captivating that the very institutional mechanism used to encourage participation of locals was used to increase their dependence on the mutual sharing of resources.

KEY TAKEAWAYS

- i. The project added USD 626,000 to the existing revenue collection and founded 33 micro enterprises that are owned by locals and directly linked to farmers.
- ii. 1000 families were professionally trained. The list also included farmers who managed to utilize 170 acres of their land to cultivate organic crops.
- iii. Domestic arrivals got a boost of 30 percent, which was equivalent to 2,100 more travelers.
- iv. Public Private Partnerships helped construct roads, wastewater treatment plants, and other infrastructure that increased value of land by two folds.
- v. Supply groups, production calendars, and day-to-day meetings.

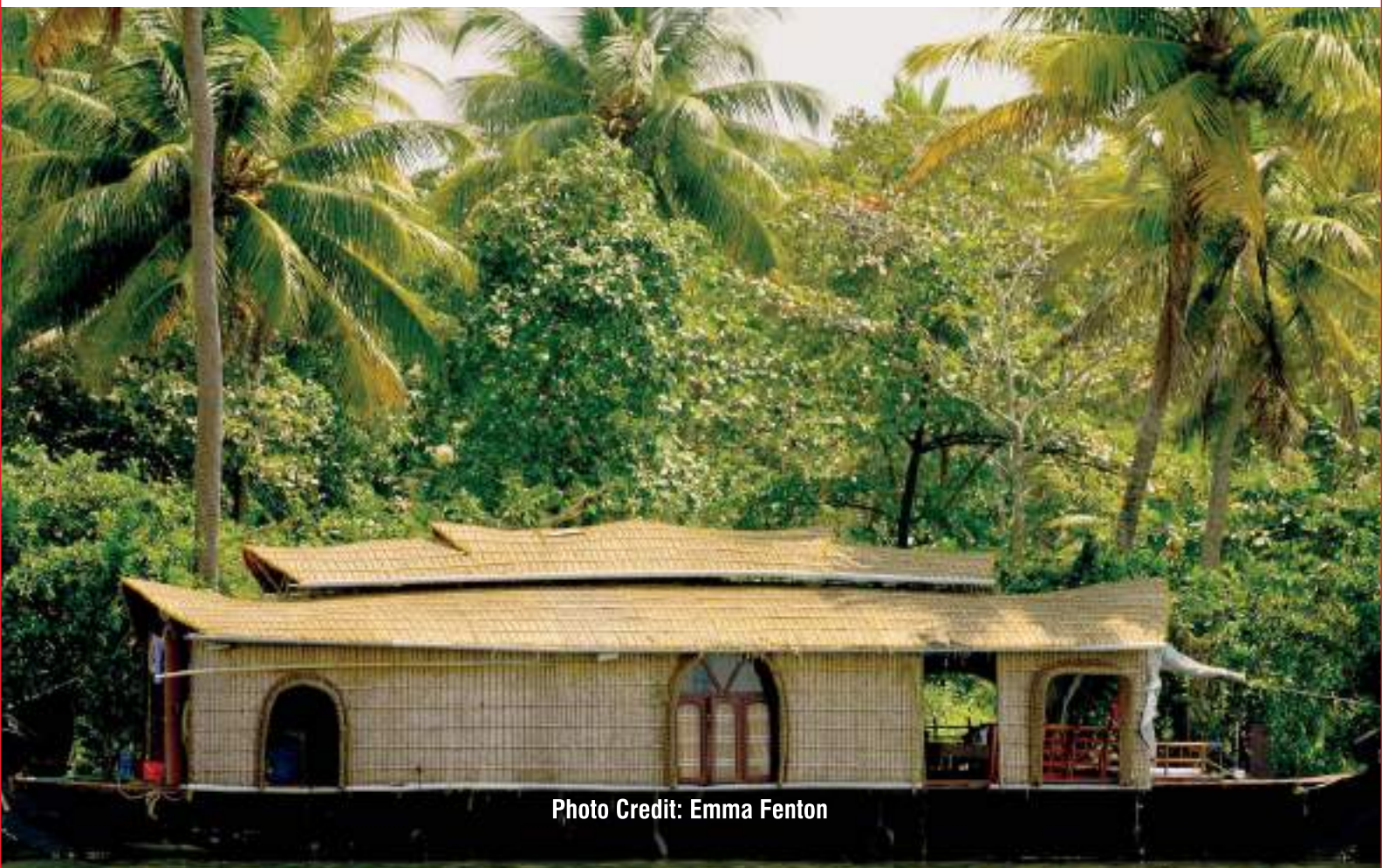


Photo Credit: Emma Fenton



CHUMBE ISLAND CORAL PARK, TANZANIA

Location:
**Gwadar and other
coastal shores**

‘Creating self-sustaining marine parks and fishing areas through eco-tourism and environmental conservation programs’

The Chumbe Coral Park (CHICOP) is an award-winning natural reserve that was developed in 1991 in the uninhabited coastal shore of Zanzibar. The principal aim of the project was to mobilize local communities in adopting sustainable eco-system management practices to preserve the depleting fish stock. The project included educational programs for school children and focused on research that encouraged springing of new commercial activities.

Today, this natural reserve has its own marine park, an eco-lodge, and a special central point for visitors. Local fishermen are provided training as ‘park rangers’ by the Park Advisory Committee, which is a tripartite venture of industries, academia, and local villagers. All travelers, fishermen, and children are educated on eco-tourism.



CHUMBE ISLAND CORAL PARK

Tanzania

Photo Credit: Alex Tamas

JOCHEN ZEITZ'S 'LONG-RUN INITIATIVE



The CHICOP is an award-winning Global Ecosphere Retreat (GER) Program that built the world's first marine park under the umbrella of Jochen Zeitz's Long Run Initiative. It is endorsed by the Global Sustainable Tourism Council (GSTC). The GSTC is an independent non-profit US-based organization that is responsible for monitoring the implementation of global sustainable standards as part of its GSTC Criteria designed for public policymakers, hoteliers, and travel operators.

The CHICOP's Long Run Initiative is propelled by the 4Cs: Conservation, Community, Culture, and Commerce to achieve results. Each destination is assessed for authenticity in standards and their long-term impact through the 4Cs before being awarded the GER internationally recognized certification.

A. Sustainable management of natural and cultural resources

B. Maximum benefit to host community by supporting local entrepreneurs, local tourism, tourism education, fair trade, etc.

C. Maximum benefit to communities, visitors and culture by minimizing pollution and managing waste

D. Maximum benefit to the environment by protecting sea, energy and managing wastewater, pollution, etc.

Figure 16: The 4Cs of GSTC, Long Run Initiative

VISITORS' CENTRE

Eco Lodge of Chumbe Island near Marine Park, Tanzania

Picture Credits: Smock



SDGs PILLARS ACHIEVED

Sustainable Economic Growth:

Tanzania, just like Pakistan, is a country blessed with a beautiful coastal line. 94 percent of fishermen who participated in the program, confirmed that the initiative helped grow the fish stock yield in the marine park.

Reducing Poverty and Unemployment: The eco-lodges were built by women and other locals that created instant jobs like valley attendants, drivers, transporters, etc. Even school curriculums required that students take part in activities concerning preservation of natural habitat.

Environment Protection: A state-of-the-art visitors' center and self-sustaining eco-lodge were built that were powered by solar panels. Dry toilets, biodegradable consumer products, and water filtration plants were set up for tourists and they were only allowed to stay up to 16 days to safeguard any permanent.

Driving Cultural Diversity, Norms and Customs: As part of the CHICOP Plan, all heritage sites were renovated, like one lighthouse, which was built in 1904. Even a small mosque was converted into a visitor center with the permission of local Muslims. Today, travelers enjoy local cuisines, festivities, technology, and traditions that adds to their overall experience.

Inculcating Sense of Mutual Understanding and Peace: All attending tourists are provided appropriate attire

when visiting beaches and other areas sensitive to Muslims.

KEY TAKEAWAYS

i. Community involvement enabled the CHICOP Marine Park to retain 480+ fish species that make up 97 percent available in the waters of East Africa.

ii. Several critically endangered bird species found refuge in the marine park. Some even got trans-located into Chumbe with the aid of Munich Hellabrunn Zoo, WWF.

iii. Curriculums involved teachers, students, government officials, tour operators, and even tourists. The one-day excursions like snorkeling, forest walks, and open-air conservation classes have gained tremendous popularity today.

iv. Mobilized investment that practically converted Zanzibar into an environmentally friendly zone equipped with an active tourism market.

v. In the 1990s ecotourism was not a priority for local government and there was a severe shortage of ideas. A German professor from Braunschweig Technical University was hired to equip locals with the knowledge, expertise, and hands-on experience required to transform Zanzibar into a thriving eco-lodge that it is today.

vi. After the initial success, the national government promulgated favorable tax incentives for all interested stakeholders.



TOURISM CENTRES, LANZORATE, SPAIN

‘Promoting sustainable tourism
by merging nature, arts and
performance’

Location:
**Places near ancient
heritage zones of
Pakistan**



BACKGROUND

The city of Lanzarote is among the most favorite destinations in the eastern corner of Canary Islands, Spain. In 1966, a renowned architect, Cesar Manrique, decided to launch a campaign to conserve the culture, heritage, and biodiversity that form an inherent part of the European continent. The foundation of Art, Culture, and Tourism Centers (CACTs) was, therefore, laid decades ago.

What is to be learned is that in a bid to showcase the beauty of Lanzarootate to the world, Manrique had partnered with municipal authorities and a host of artists, gardeners, craftsmen, masons, and cabildo workers to develop a series of tourist centers.

Today, this network of tourist centers spans cross nine locations that feature timeless wonders of the world and visited by 3 million tourists, every year.

SDGs PILLARS ACHIEVED

Sustainable Economic Growth: The Tourism Centers turned out to be so

profitable that stakeholders began replicating them in other cities. Domestic visits boosted by up to 31 percent and tourism products like underwater museum in CACTs, became top attractions.

Reducing Poverty and Unemployment: The centers are skill development hubs that has created over 7,700 jobs. Each employee receives training of an average 69 hours per year.

Environmental Protection: The R&D department of each center monitors levels of carbon emissions from tourism activities. 90 percent of the CACTs staff has mastered the environmental protection and best management practices in preserving endangered species.

Driving Cultural Diversity, Norms, and Customs: 2.8 percent of the budget of CACTs was reserved for the renovation and conservation of national heritage points such as museums.

KEY FEATURES

i. Part of the fund from visits is reserved for renovating local municipalities and the rest is used for salary disbursement and arranging education fairs and entertainment roadshows.

ii. Routine checks are performed to ensure that important forests and other historic sites are not damaged. Since these initiatives are largely driven by public-private partnerships, the government has kept all activities regulated to protect different landscapes.

iii. Giving the locals a say in the planning and development phase, as well as operations, resulted in a greater show of commitment toward benefiting societies.

UNDERWATER MUSEUM

Lanzarote, Spain

Photo Credit: Travel Archives of Luxuo





MAKRA PEAK

Hazara Division, Khyber Pakhtunkhwa
Photo Credit: Sabeer Dar



VIEW FROM A HILL STATION
Khyber Pakhtukhwa



GREEN TOURISM POTENTIAL IN PAKISTAN

100%

All forestation of bamboo is privately owned without any role of Government (INBAR and FAO, 2005)

1.1%

Total representation of bamboos species in forests of Pakistan (INBAR and FAO, 2005)

6 times

Stronger than steel reinforcement (Construct Update, 2019)

Mature in 3-4 years

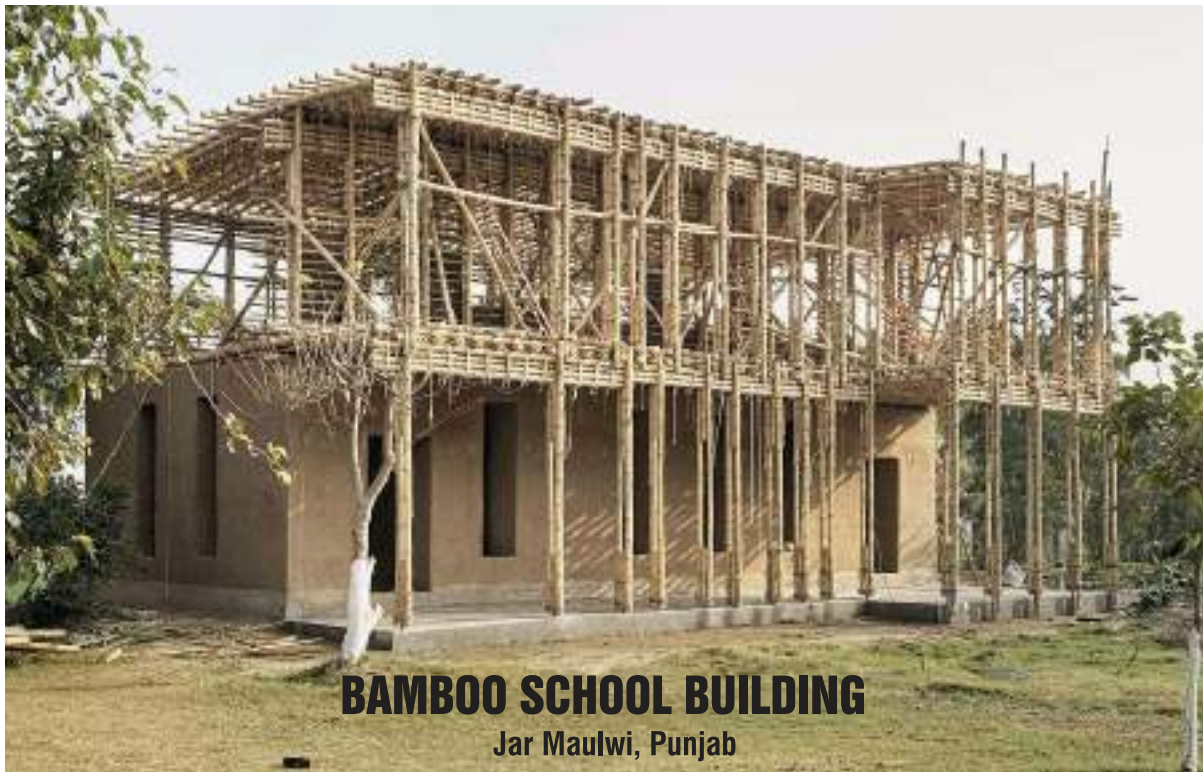
Cultivates in areas with altitude below 1200m (FAO Forestry Department, 2005)

PROFIT = 1000 x COST

1 acre land uses Rs. 20,000 to produce 5000 bamboos that sell for Rs. 200,000 (Ahmed, 2020)

Bamboo belongs to the *Graminae* family of grass and boasts over 1200 species worldwide (Elizabeth Wageman, 2019), 65 percent of which are found in Asia alone.

In Pakistan, despite the ideal semi-arid and tropical conditions, cultivation of bamboo is limited to only 85 districts with Punjab being the epicenter. After the 1971 Indo-Pak Fallout, Pakistan lost most of the bamboo forestation to Bangladesh. However, in the '80s, the Government imported few notable species from India, Bangladesh, China, and Thailand like *Bambusa Strictus* that is, today, extensively used in the construction industry.



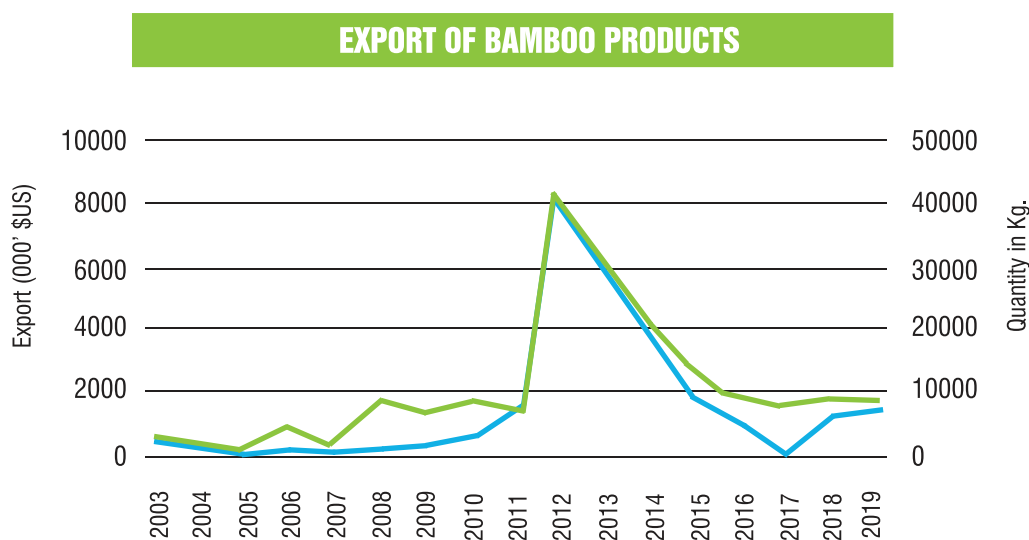
BAMBOO SCHOOL BUILDING

Jar Maulwi, Punjab



This fast wood-like grass, pure bamboo of HS 140110, has a US\$ 300 million world export market. In 2019, Pakistan exported only less than US\$ 2 million. Only 1.1 percent of the forest cover of Pakistan is dedicated to the production of bamboos. This makes up 6.25 million tons of mature bamboos, which is 4 times less as compared to in 2012.

As an estimate, if the forest cover of Pakistan increases by 1 percent, it will add 3.17 million tons of bamboo at maturity stage, given if every farmer cultivates on a minimum of 0.5 acres of land. This means more will be available for use in constructing basic tourism-related infrastructure and this is where bamboo can play a leading role in building eco-tourism.



Graph 4: Bamboo Export from Pakistan; Source: UN Comtrade





BAMBOO VILLAGE PHU AN VIETNAM

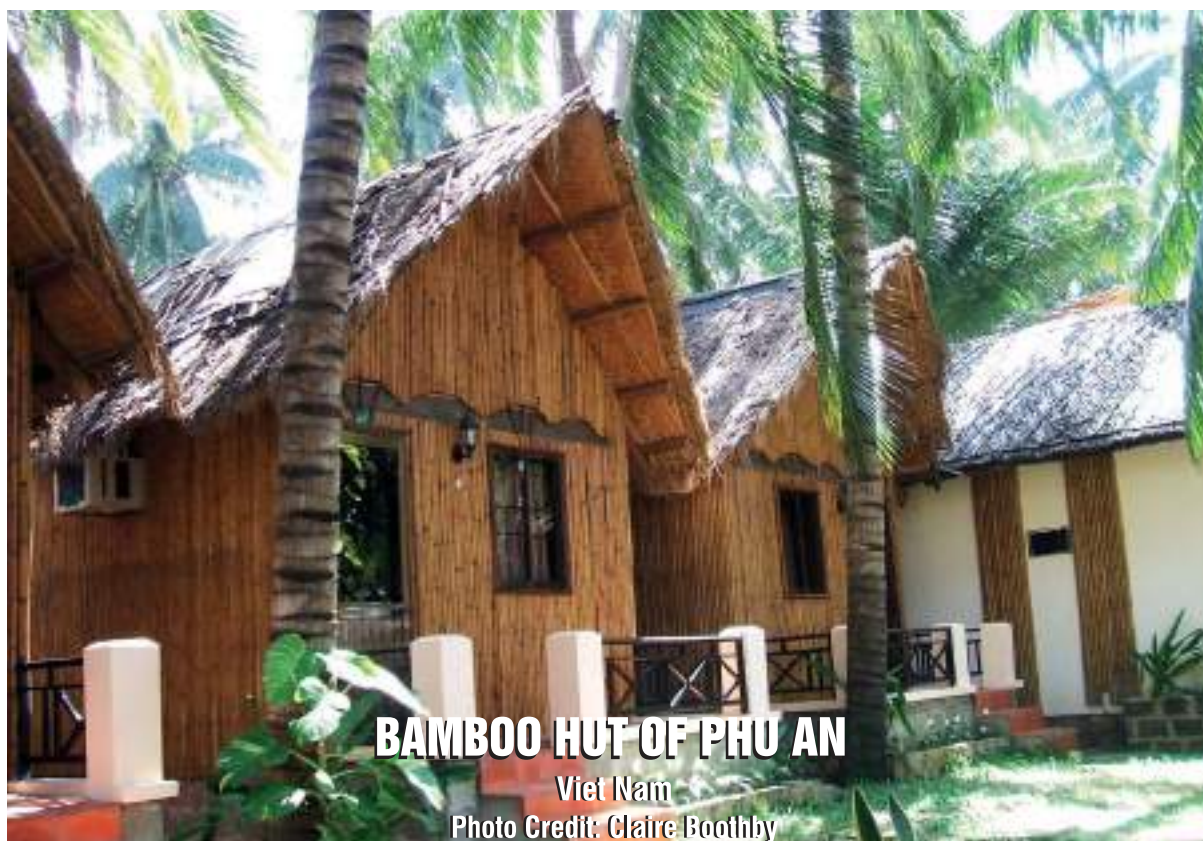
Location:
**Areas of Balochistan
and interior Sindh,
near Indus River**

**‘Creating sustainable livelihoods
with eco-tourism and bamboo
forestation’**



KEY PLAYERS INVOLVED

- i. Popular Committee: convincing locals for permission
- ii. Women’s Union: involving local women in the project
- iii. Swiss NGO Helvetas: creating access to microfinance
- iv. Rhone Alps France: funding a Bamboo Eco-Museum
- v. National University of Sciences: research, and skill development



BAMBOO HUT OF PHU AN

Viet Nam

Photo Credit: Claire Boothby



BACKGROUND

In the aftermath of the 1965 US bombing of Viet Nam, one village of Phu near Saigon in Binh Duong province decided to introduce survivable species of bamboo in regions close to rivers. Like it is practiced in underdeveloped parts of the world, the uneducated Vietnamese too used to cut off bamboo shoots before maturity. Both events caused significant damage to the local economy.

Hence, the main objective of this 2010 Ecuador Prize-winning project was to rebuild and convert the village of Phu An into an ecological museum for tourists with the help of locals. Several informational and consultation sessions were arranged between stakeholders, the government, and the local village leaders to convince each party of the enormous economic benefits of this environmental restoration program. To address the longstanding disputes of local villagers and to defuse the resistance of landowners over selling of properties to industries, the administration formed a “Popular Committee” with residents who then explained to their families how transforming the locality into a Bamboo Village would create a permanent source of income.

Since then, the Phu An initiative has managed to introduce over 350 specimens of bamboo plants. The program was led by four researchers, fifteen permanent staff, five technical consultants, five farmers, and a steering committee comprising mostly local women. Every season, college students take part in promoting and refining the initiative with fresh ideas, which are then presented to the entire community for collection decisions.

HOW THEY DID IT?

Introducing Latest Farming Techniques: villagers are responsibly educated on seed varieties, latest market trends, and methods of converting raw bamboo into value-added commercially viable products like chairs, doors, sheds, scaffolding, etc.

Screening Different Bamboo Species for Best Fit: all research activities take place inside the bamboo Eco-Tourism Museum and Botanical Conservancy. Here, the physical and chemical properties of bamboo species are tested for applicability in the desired areas. Then the results are shared with local community members and the shortlisted varieties (hardness, growth, production, etc.) are procured to meet demand.





Blending New Technology and Traditional Knowledge: this is the best feature of the Phu An Bamboo Village Initiative. Bamboo farming is done using traditional knowledge but with application of cutting-edge technology.

IMPACT ON COMMUNITY DEVELOPMENT AND TOURISM ENHANCEMENT

Denser Forests with Diverse Varieties of Bamboo: since 1999, the number of bamboo species in Vietnam has grown from 7 to 350, all looked after by the Bamboo Eco-Museum and Botanical Conversation Research Centre. Tourists are narrated stories of the entire program and how it helped elevate the standard of living of villagers.

Greater Ownership of Local Community: locals got inspired to adopt modern tools for cultivation and processing of bamboo. Several endangered species of bamboo were replanted and school children developed special interest in afforestation.

Flexible Bamboo Catalogue to Meet Global Demand: after the successful mapping of different seed varieties, and

their adaptability to different climatic conditions, the villagers managed to match the market competition and start their own businesses.

Wastewater Treatment with Lantana Camara Bamboo: the Saigon River used to be contaminated with unregulated industrial waste. In 2000, local authorities of Binh Duong province imposed stricter regulations on industrial plants, but no government units were devoted to cleaning sewerage canals. This compelled the Phu An Bamboo Village to experiment with phytoremediation by using bamboo plants to clean and filter out metals from rivers. The Lantana Camara species was best fitted for this purpose, and it also attracted several wildlife birds that added to the delight of visitors.

Women Empowerment: with newly acquired skills, many, otherwise unemployed young women, managed to get in commercial organizations to manufacturer value-added bamboo products. Moreover, as part of the program, 15-kilometer hiking trails were created that brought additional income from visiting travelers. The Bamboo Village of Phu An cut down Poverty by 80 percent (UNDP, 2012).







SILK ROAD
Gilgit Baltistan
Photo Credit: Ajmal Ali



BIRD'S EYE VIEW OF KARACHI

Photo Credit: Faique Mushtaq Wani

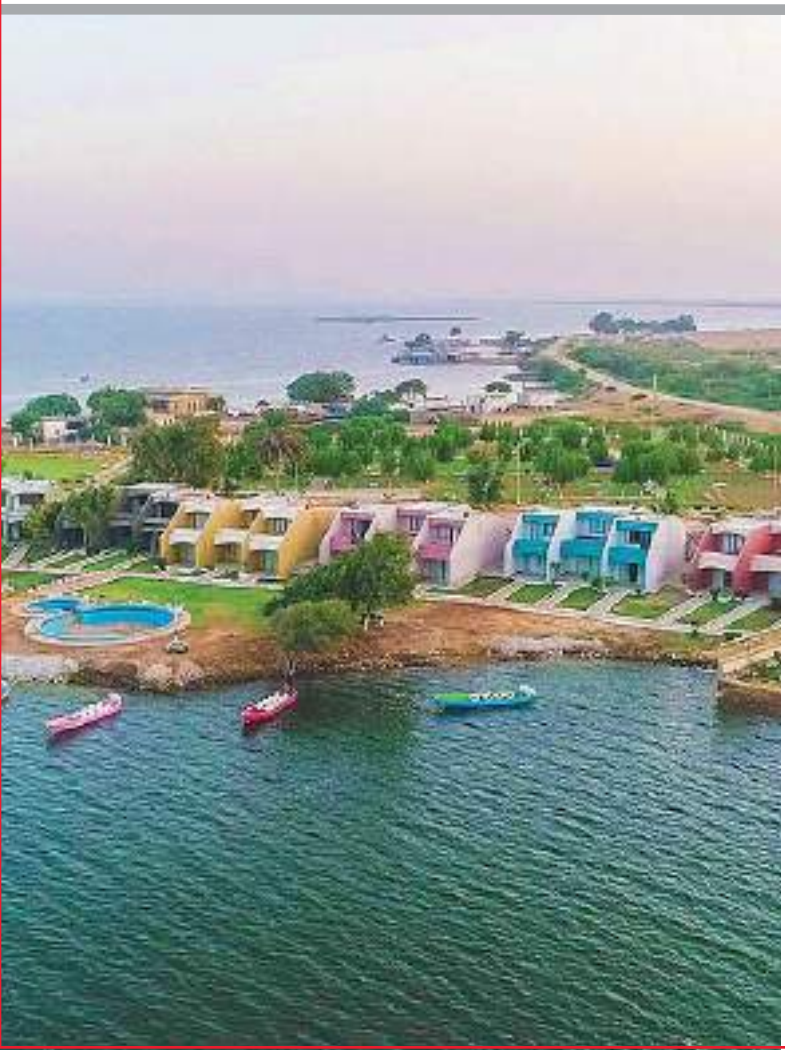
PROVINCE-WISE INVESTMENT OPPORTUNITIES **SINDH**

KARACHI

Location: Citywide

Investment Opportunities:

- Renovation of several historic buildings to convert them into Heritage hotels
- 3-to-5-star hotels MICE Tourism facilities
- Maritime tourism resorts along the coastline
- High end restaurants
- Water sports club with range of facilities for tourists
- Guide city sightseeing tour service
- Rent a car service for FITs and groups



KEENJHAR LAKE

Location: Thatta District

Investment Opportunities:

- Lakeside resort for boarding and lodging
- Restaurants and franchise food outlets
- Water sports club with range of facilities for tourists
- Recreational theme park
- Guide sightseeing tour service
- Fishing club
- Rent a car service for FITs and groups
- Ecotourism such as bird watching
- Handicrafts/craft bazar

Description: Favorite bird sanctuary for winter migratory birds like cormorants, waders, and gulls.

RANIKOT FORT

Location: Jamshoro District

Investment Opportunities:

- Tourist boarding and lodging
- Restaurants serving traditional food
- Guide sightseeing tour service
- Handicrafts/Souvenir Shop

Description: Great wall of Sindh having 26 Km circumference that is the highest in the world.



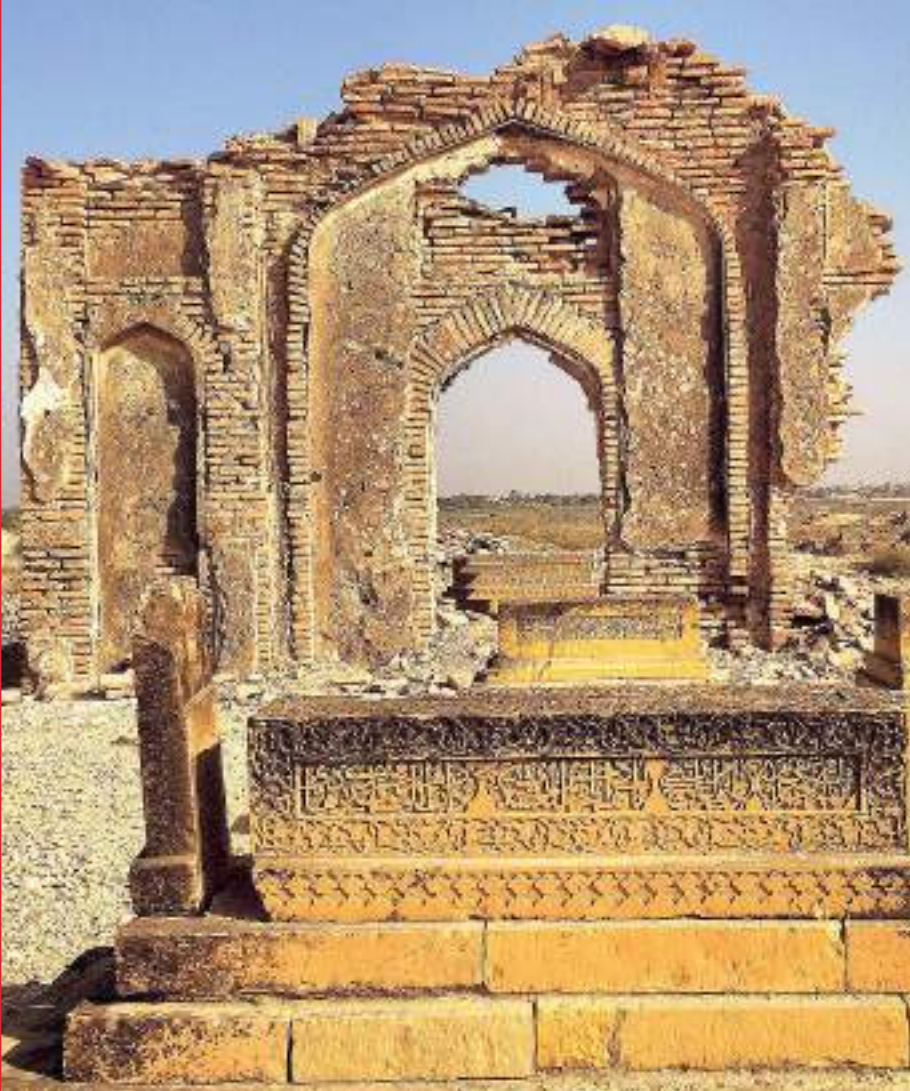
BHIT KHORI

Location: 45 Km from Hawksbay

Investment Opportunities:

- Restaurant
- Water sports club with range facilities for tourists
- Handicrafts/Souvenir Shop

Description: Picnic point with stunning beach and dense hills.



BHAMBORE

Location: Near Karachi

Opportunities:

- Tourist Spot

Description: Gateway to Sindh during a time when Muhammad Bin Qasim invaded Sindh.

CAPE MONZE BEACH

Location: Karachi

Investment Opportunities:

- Restaurant
- Water sports club with range of facilities for tourists
- Handicrafts/Souvenir Shop

Description: View of the horizon and dark blue sea from the top of the hill. At times one can spot whales and dolphins.





KOT DIJI FORT

Location: Khairpur District

Investment Opportunities:

- Tourist boarding and lodging
- Restaurant serving traditional food
- Guide sightseeing tour service
- Handicrafts/Souvenir Shop

Description: Well preserved fort on the ridge of a steep narrow hill, built-in 1790 by the Talpur Dynasty Ruler of Upper Sindh, Mir Suhrab.



KAROONJHAR MOUNTAIN

Location: Tharparkar

Investment Opportunities:

- Tourist boarding and lodging
- Restaurant serving traditional food
- Guide sightseeing tour service
- Handicrafts/Souvenir Shop

Description: Sparsely populated jungle area with two perennial springs named Achleshwar.

FAIZ MAHAL

Location: Khairpur

Investment Opportunities:

- Tourist boarding and lodging
- Restaurant serving traditional food
- Guide sightseeing tour seeing
- Handicrafts/Souvenir Shop

Description: Built by the Khairpur Dynasty in 1798, served as a sovereign court for the royal palace complex of Talpur monarchs. It originally had 16 waiting rooms for courtiers alongside darbar and dining halls. The mango orchard of today stands in place of a Hathi Khana once, for royal elephants.



FRERE HALL

Location: Karachi

Opportunity:

- Tourist Centre

Description: The Venetian-Gothic designed building from the times of British Raj, is constructed using yellow limestone with numerous pointed arches, quatrefoils and flying buttresses symbol of Victorian Era. It stands well renovated and maintained in the epicenter of a busy family park and adjacent to Japanese Consulate.



EMPRESS MARKET

Location: Karachi

Investment Opportunities:

- Food City
- Bell Tower and Horse Carriages
- Tourist boarding and lodging
- Restaurants serving traditional food and fast food
- Guide sightseeing tour service
- Handicrafts/Souvenir Shop

Description: Built-in 1884-1889, during British Raj under Queen Victoria. During the War of Independence 1857, it was a site of ruthless killings of native sepoys by the hands of the British. Today, it serves as a bazaar but the traffic congestion and pollution have marred the structure and ambiance.



BALUCHISTAN

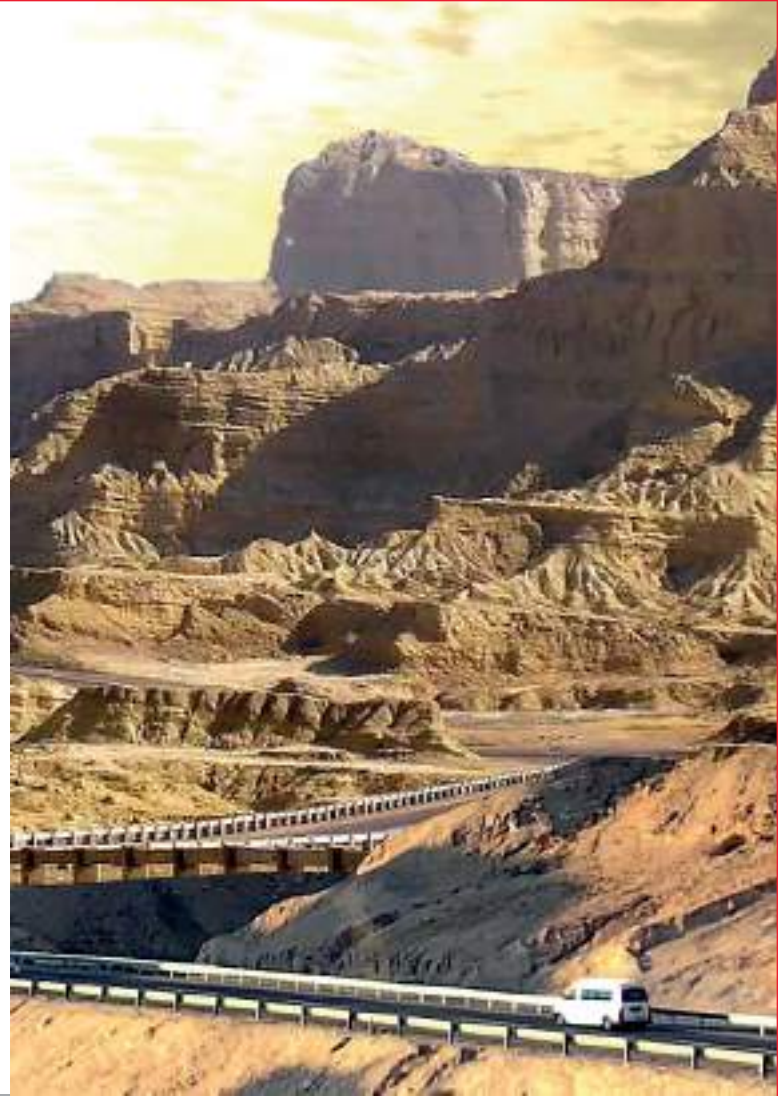
HINGOL NATIONAL PARK

Location: Makran Coast, 190 Km from Karachi

Investment Opportunities:

- Resorts and picnic
- Tourist boarding and lodging
- Guide sightseeing tour service
- Ecotourism Resort and Wildlife sighting tours
- Handicrafts/Souvenir Shop

Description: Largest national park by size that provides sanctuary to wildlife from vultures.



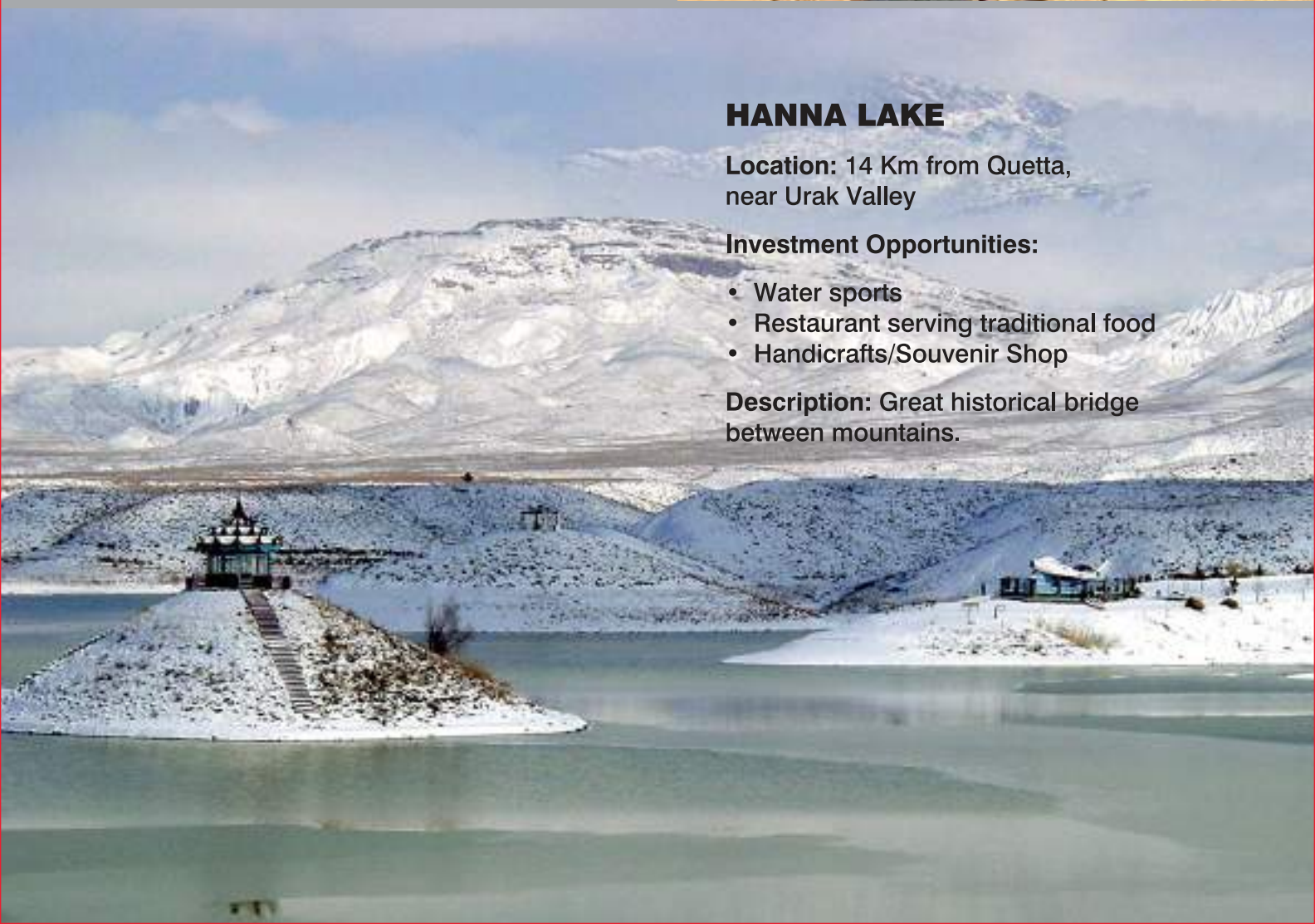
HANNA LAKE

Location: 14 Km from Quetta, near Urak Valley

Investment Opportunities:

- Water sports
- Restaurant serving traditional food
- Handicrafts/Souvenir Shop

Description: Great historical bridge between mountains.



PIR GHAYB

Location: Bolan

Investment Opportunities:

- Resorts
- Restaurant serving traditional food
- Water theme park
- Handicraft/Souvenir Shop

Description: Locals believe in the existence of an invisible saint, named, Pir Ghaib.



QILA MIRI

Location: Quetta

Investment Opportunities:

- Traditional food/restaurant and travel guide

Description: Mirri Fort has existed from prehistoric days and sits over a mud volcano.

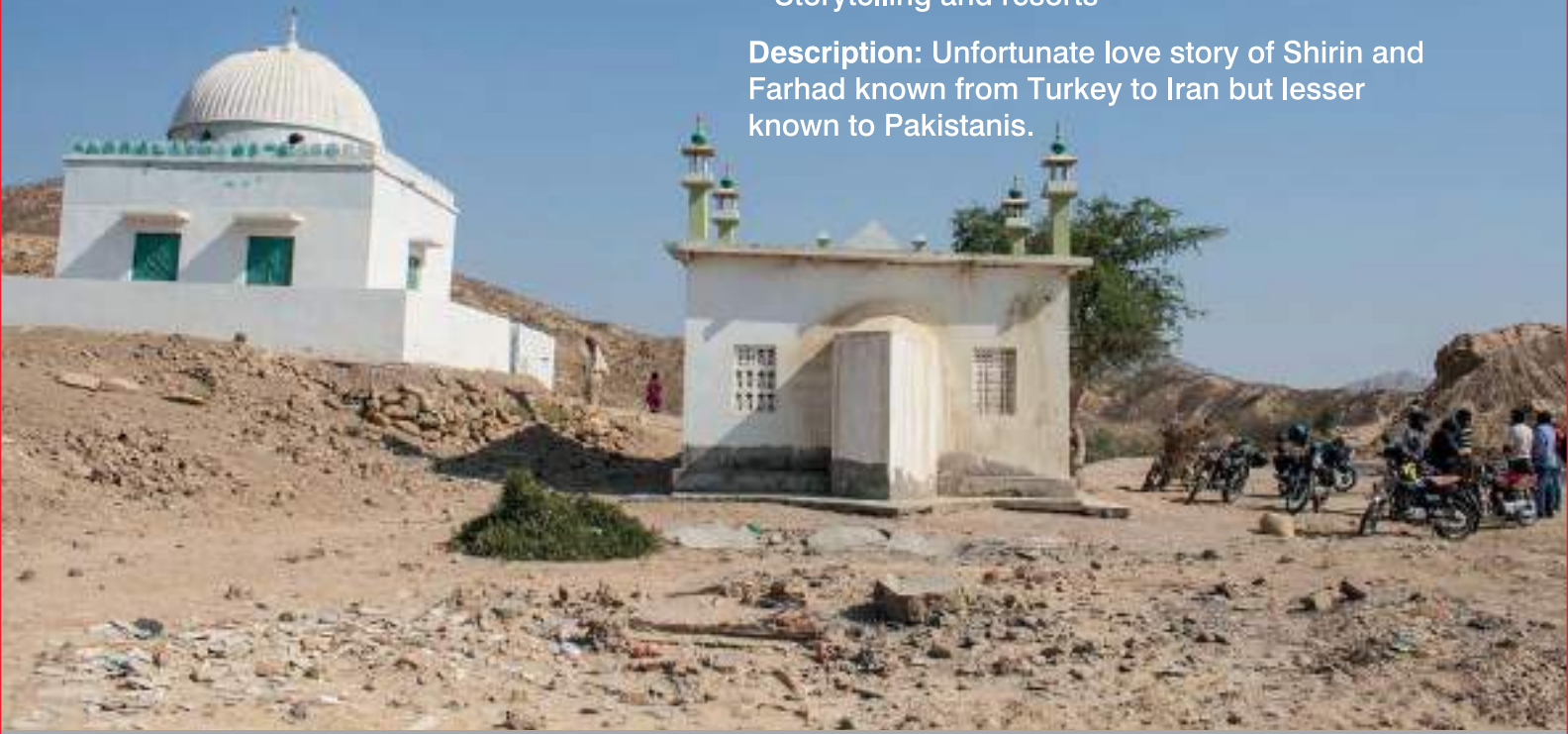
SHIRIN AND FARHAD SHRINE

Location: Jhaoo Tehsil, Awaran District

Opportunity:

- Storytelling and resorts

Description: Unfortunate love story of Shirin and Farhad known from Turkey to Iran but lesser known to Pakistanis.



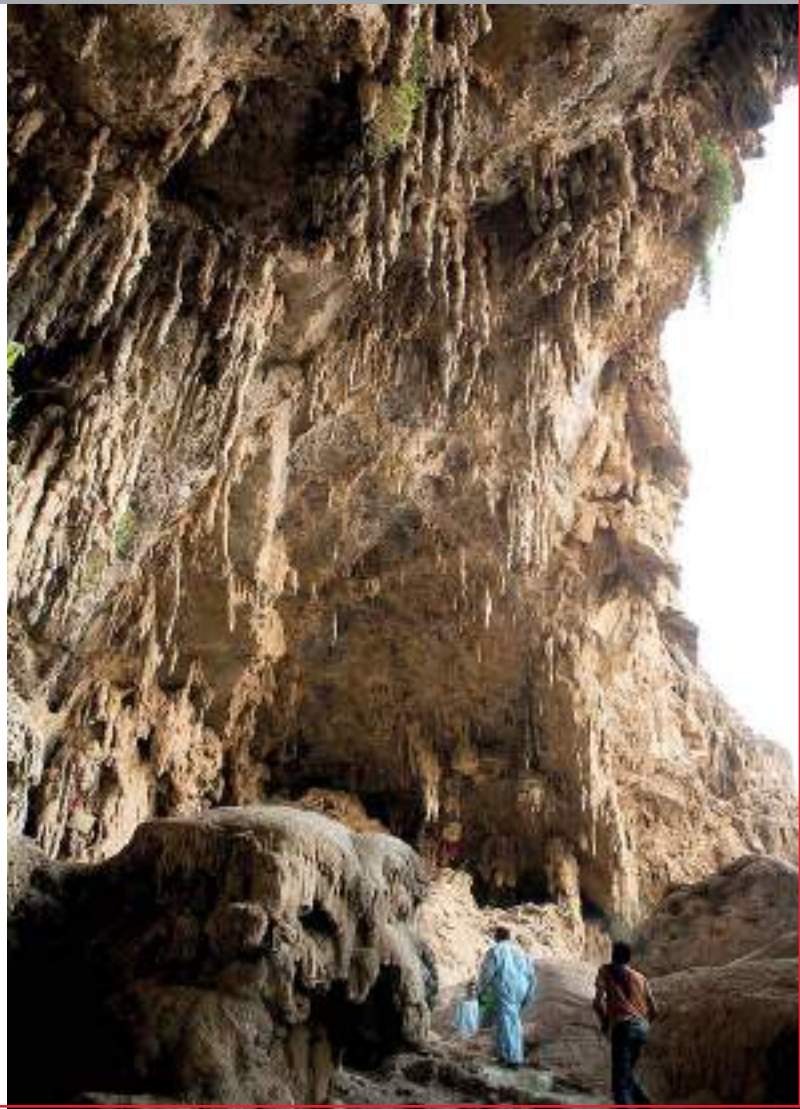
LAHOOT LAMAKAN CAVE

Location: 110 Km from Karachi in Northwest direction in Tehsil Wadh, Khuzdar.

Investment Opportunities:

- Hotels and motels

Description: Considered as Cave of Shah Noorani, with freshwater springs from mountains and stunning landscape.



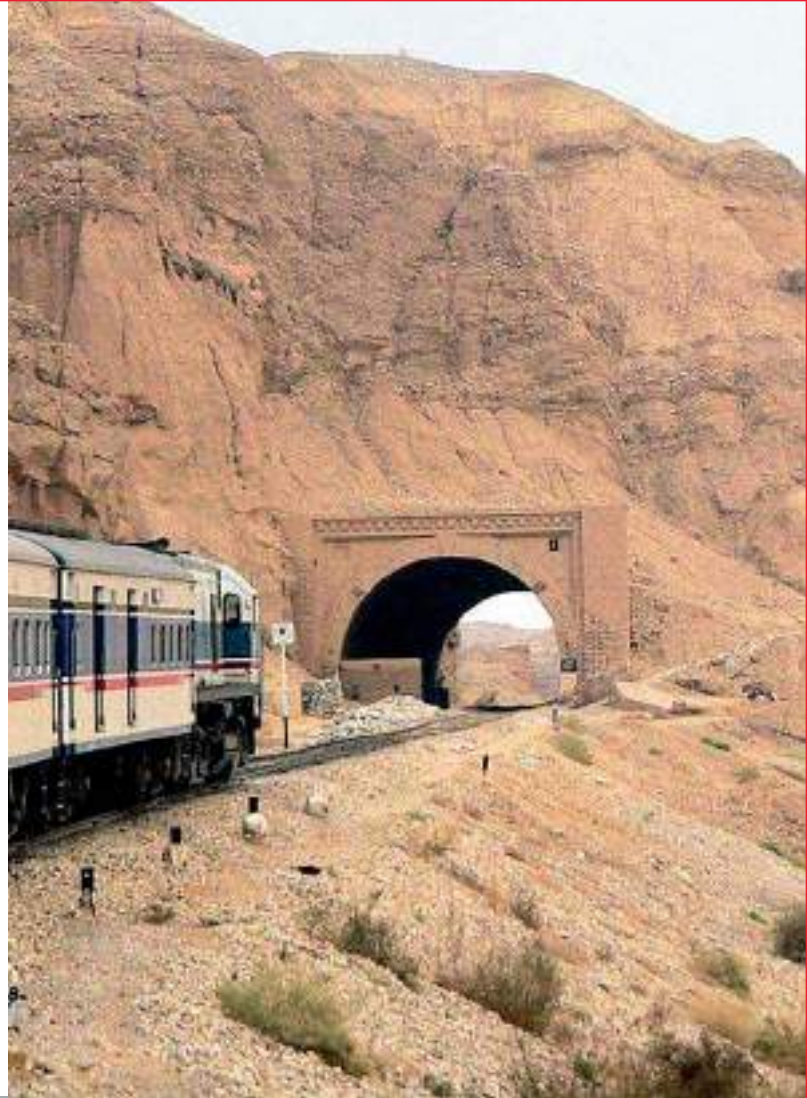
WAADI-E-BOLAN

Location: Gateway through Central Brahui Range

Investment Opportunities:

- Tourist boarding and lodging
- Restaurant serving traditional food
- Camel Safari tours service
- Rail Safri to Kolpur
- Handicrafts/Souvenir Shop

Description: Gorges with blue waters running through mountain valleys. Place where fundamental railroad arrangement of Pakistan was built by British.



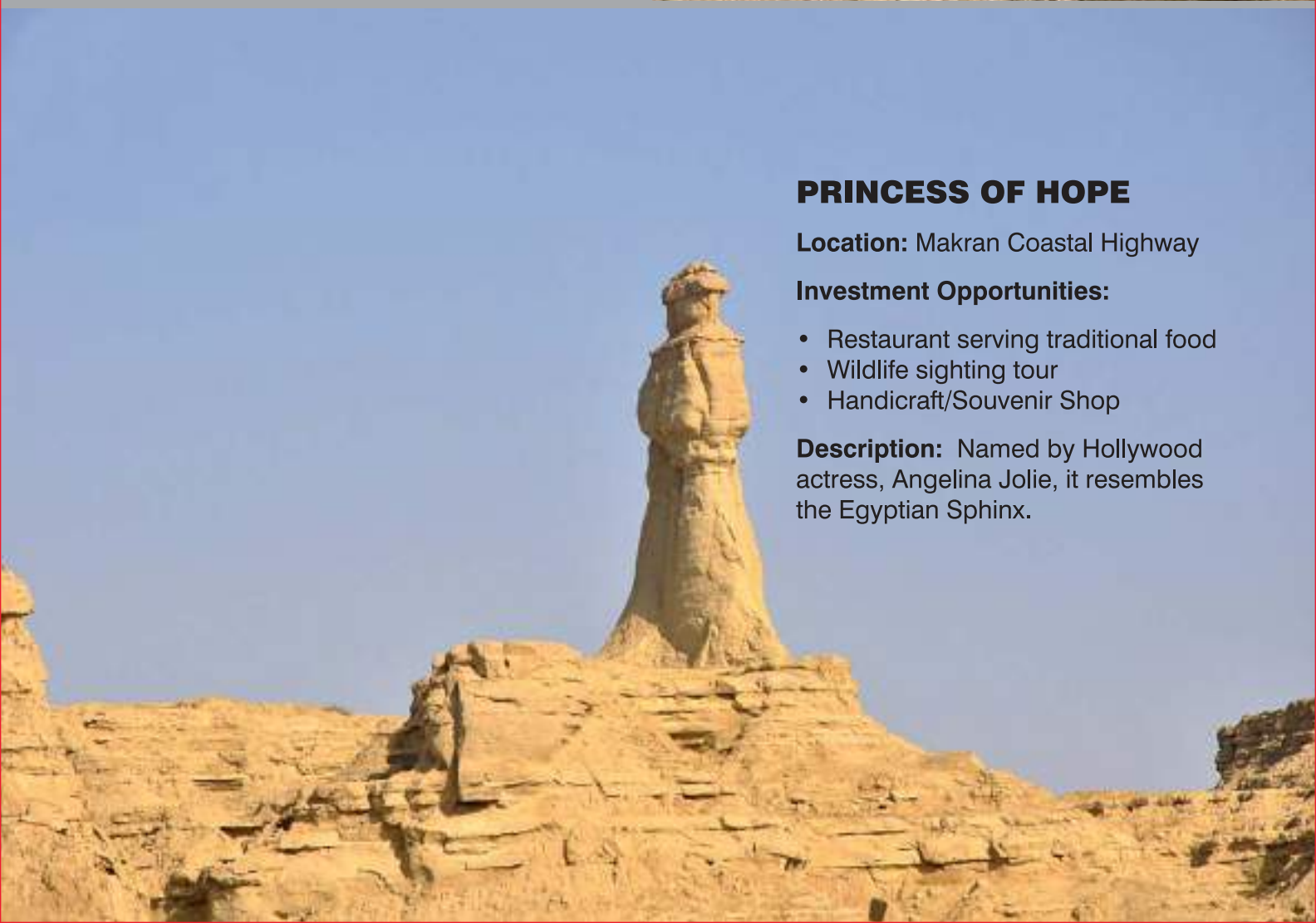
PRINCESS OF HOPE

Location: Makran Coastal Highway

Investment Opportunities:

- Restaurant serving traditional food
- Wildlife sighting tour
- Handicraft/Souvenir Shop

Description: Named by Hollywood actress, Angelina Jolie, it resembles the Egyptian Sphinx.



ASTOLA ISLAND

Location: 39 Km from Pasni Port

Investment Opportunities:

- Underwater adventure
- Resorts
- Water sports club
- Scuba diving and dolphin sightseeing tours
- Handicrafts/Souvenir Shop

Description: Large titled plateau with series of seven small hillocks.



A wide-angle photograph of a vibrant blue lake nestled in a lush green valley. The lake is surrounded by steep, rocky mountains with patches of snow. The sky is bright blue with scattered white clouds. The foreground shows a grassy slope leading down to the water's edge.

KHYBER PAKHTUNKHWA

DUDIPATSAR LAKE

Location: Mansehra, KP

Investment Opportunities:

- Tourist boarding and lodging (Glamping Resort)
- Restaurant serving traditional food
- Trekking tour services

Description: Shaped like a tear, it is 4254 m above sea level and considered the highest lakes of the Himalayas.

A photograph of a calm lake reflecting the surrounding mountains and sky. The water is very still, creating a clear mirror image of the landscape. The mountains are rugged and rocky, with some sparse vegetation. The sky is blue with white clouds.

KUNDOL LAKE

Location: North of Utror Valey at 20.8 Km from Kalam.

Investment Opportunities:

- Tourist boarding and lodging (Glamping Resort)
- Restaurant serving traditional food
- Trekking tour services

Description: Mountains covered by a thick blanket of vegetation in the lap of Hindu Kush at a height of 9,950 ft.

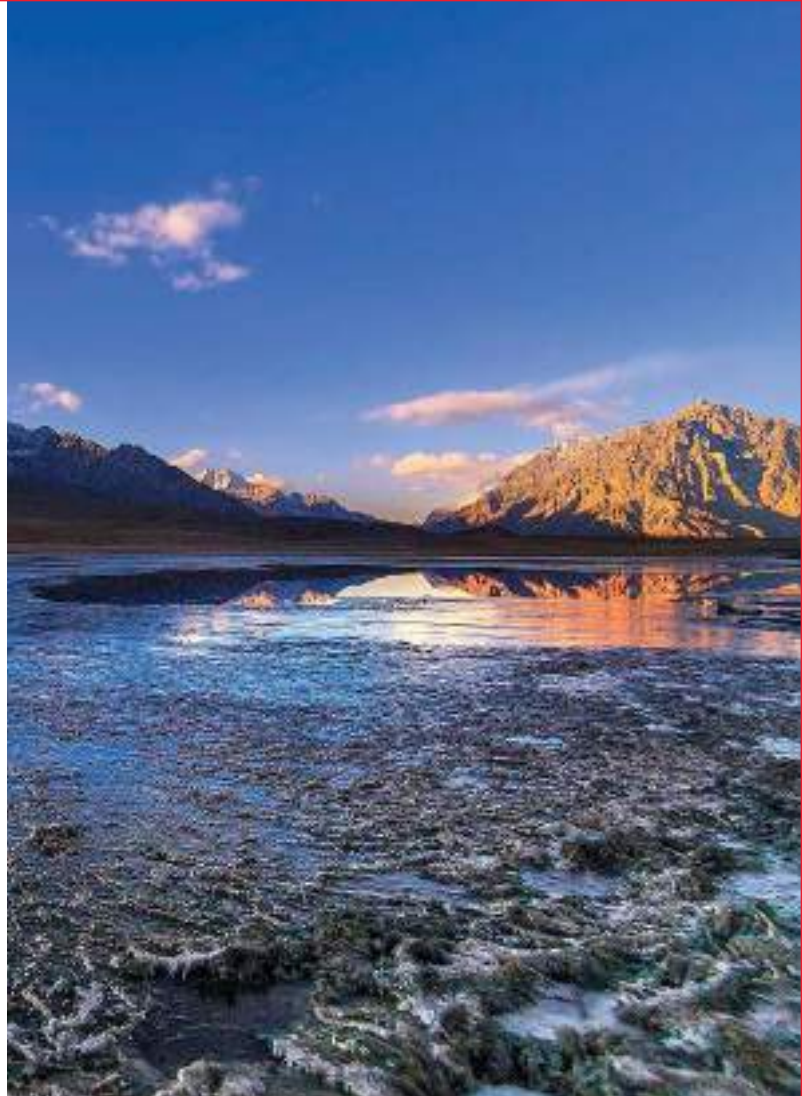
SHANDUR LAKE

Location: Ghizer District, GB

Investment Opportunities:

- Tourist boarding and lodging (Glamping Resort)
- Water sports resort
- Restaurant serving traditional food
- Trekking tour services
- Paragliding center
- Trout fishing

Description: Popularly known as the 'Roof of the World', at 12,500 ft height above sea level, having a flat plateau that can be crossed between late April and early November.



SPIN KHWAR LAKE

Location: Near mountains at north of Kandol Lake and east of Utror Valley.

Investment Opportunities:

- Transportation
- Tourist boarding and lodging (Glamping Resort)
- Restaurant serving traditional food
- Trekking tour services

Description: Tine low white stream flowing in eastern direction to the lake from encircling mountains.



JABBA ZOMALU LAKE

Location: Ushu Valley, Kalaam-Swat

Investment Opportunities:

- Transportation
- Infrastructure
- Tourist boarding and lodging (Glamping Resort)
- Restaurant serving traditional food
- Trekking tour services

Description: The alpine glacial lake is at an elevation of 14,040 ft, gives a distinct view of Mr. Falaksar, Mt Miangul Sar, and Mankial-Bateen Massif all together located in the Kandia Valley (Gabriel).



BASHIGRAM LAKE

Location: East of Bashigram Valley, near Madyan

Investment Opportunities:

- Trekking
- Tourist boarding and lodging (Glamping Resort)
- Restaurant serving traditional food
- Trekking tour services

Description: Metaled Road fit for 4x4 jeep that takes an hour to reach spot inhabited by hospitable villagers. Surrounded by mountains with mouth open to silently creeping water from under the rocks.



KATORA LAKE

Location: Upper reaches of Jahaz Banda, Kumrat Valley

Investment Opportunities:

- Tourist boarding and lodging (Glamping Resort)
- Restaurant serving traditional food
- Trekking tour services

Description: Lush green and idyllic hill station in Dir Kohistan at 3,100 m above sea level, surrounded by snowy mountains, green pastures, and towering trees.

AZAD JAMMU AND KASHMIR (AJK)

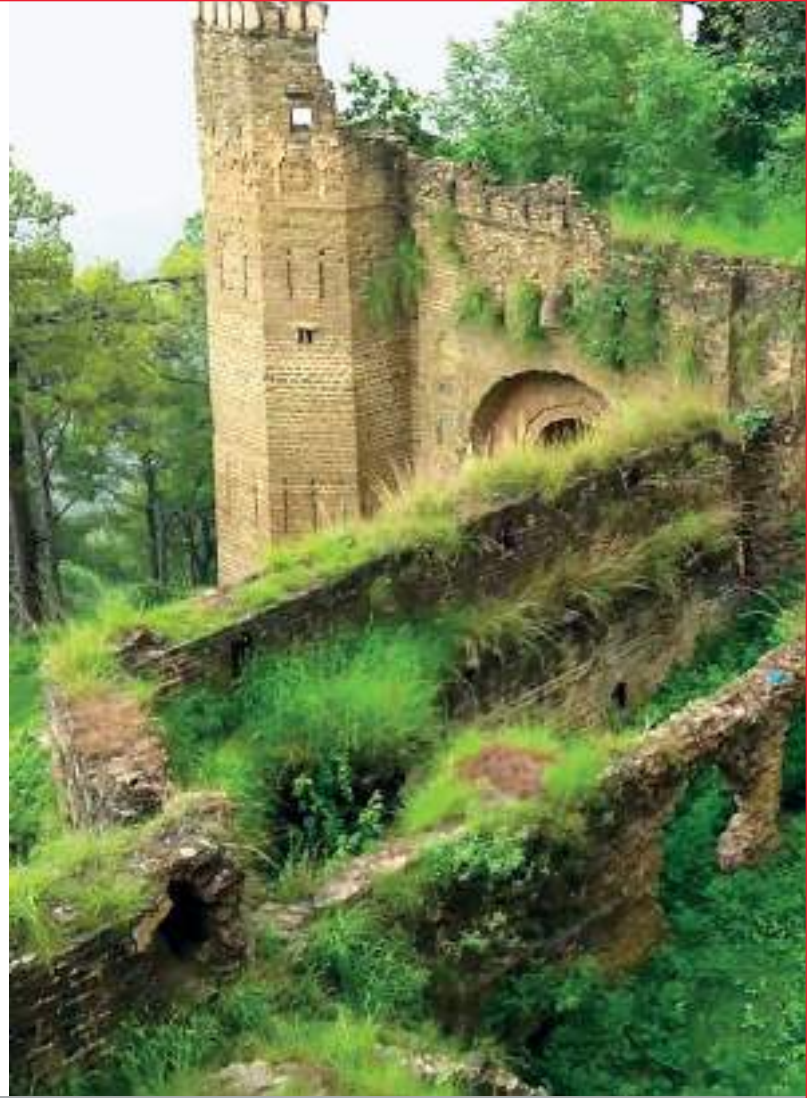
THROTCHI CASTLE

Location: Kotli District

Opportunity:

- Tourism Centre and restaurants serving traditional cuisines

Description: Built in 1460, adjacent to Gulpur at southwest of Kotli city.



BANJOSA LAKE

Location: Rawalakot

Investment Opportunities:

- Boating
- Tourist boarding and lodging (resort)
- Restaurant serving traditional food
- Trekking tour service

Description: Artificial Lake at 1,981 m above sea level. It is encircled by dense pine trees and large mountains.



RATTI GALI LAKE

Location: Neelum Valley

Opportunity:

- Resorts
- Tourist boarding and lodging (Glamping Resort)
- Restaurant serving traditional food
- Trekking tour services

Description: Located at 3700m above sea level, the alpine lake is open throughout summers featuring mesmerizing lake, lush green meadows, colorful flowers, and radiant plantations.

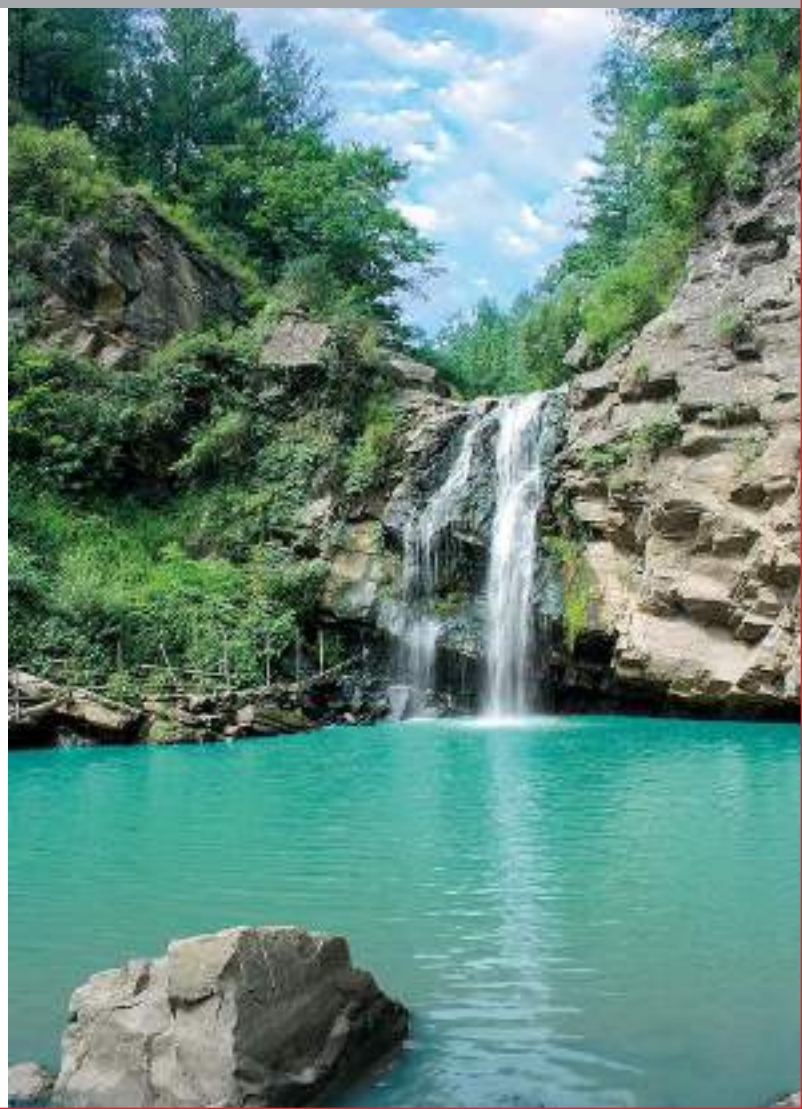
NERGOLA WATERFALL

Location: Rawalakot

Investment Opportunities:

- Sightseeing and picnics
- Tourist boarding and lodging (Glamping Resort)
- Restaurant serving traditional food
- Trekking tour services

Description: Located 120 km from Rawalpindi.





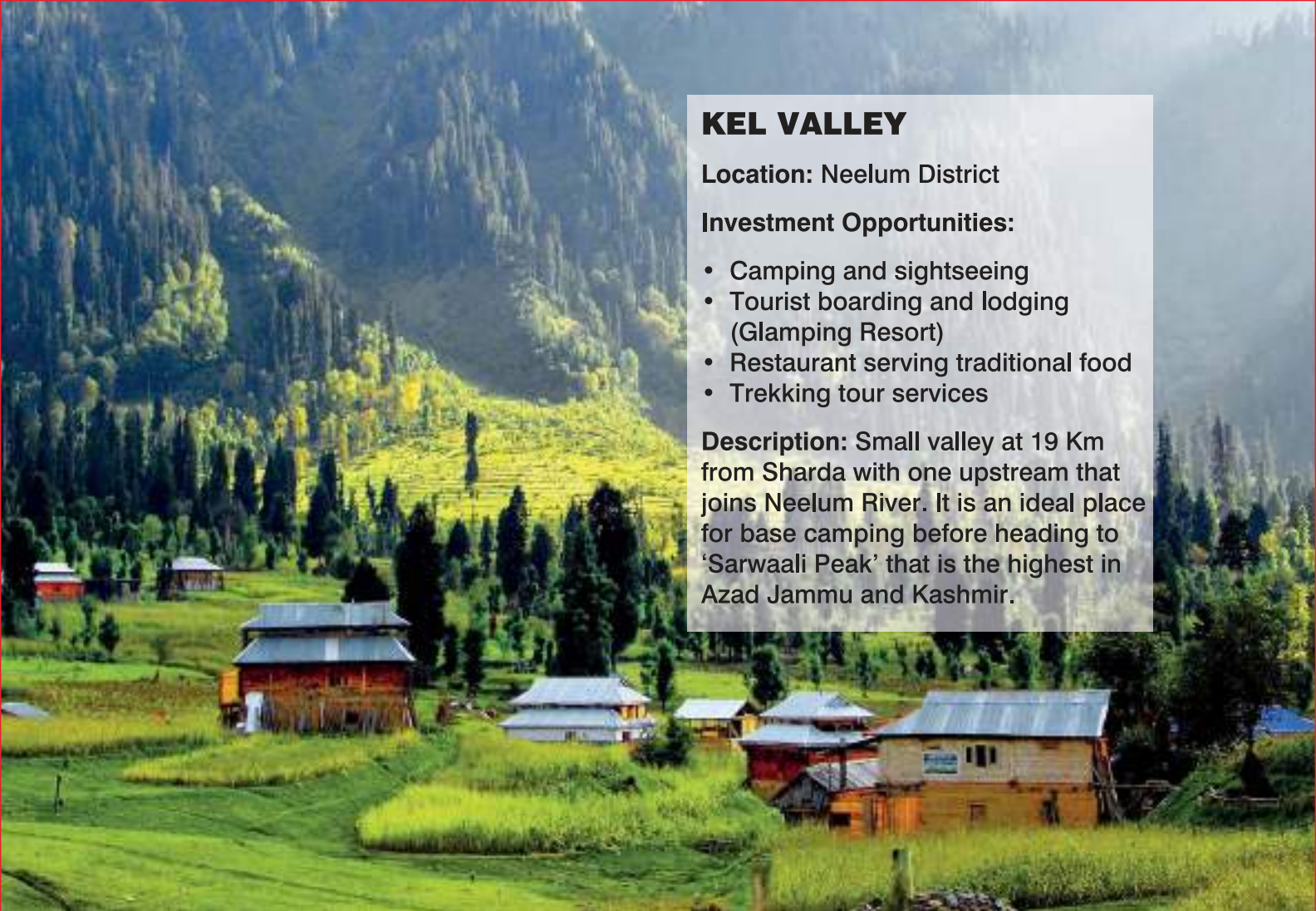
GANGA CHOTI

Location: Bagh District

Investment Opportunity:

- Resorts and shopping area

Description: Located near the town of Bani Minhasan, at 9,987 ft altitude.



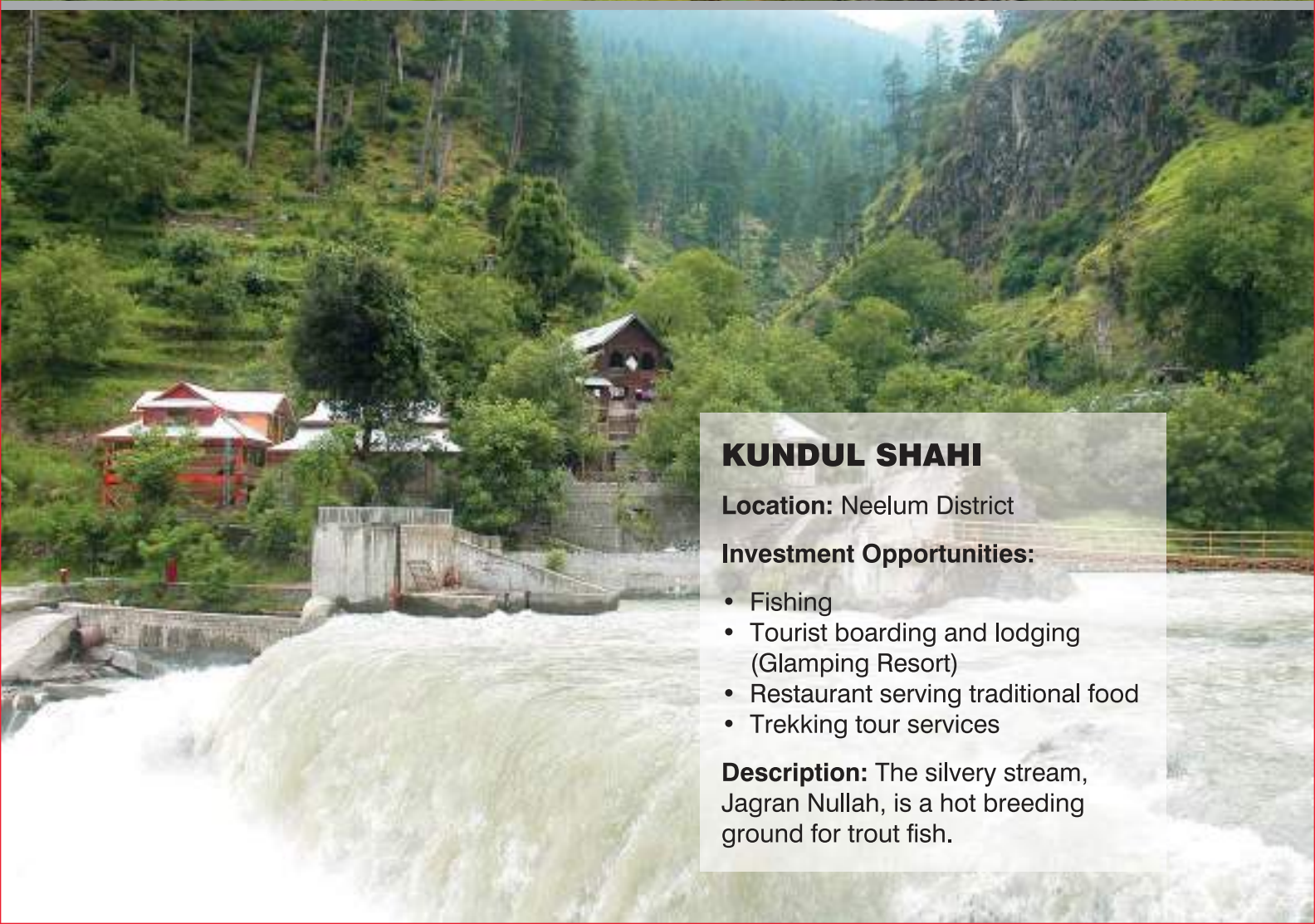
KEL VALLEY

Location: Neelum District

Investment Opportunities:

- Camping and sightseeing
- Tourist boarding and lodging (Glamping Resort)
- Restaurant serving traditional food
- Trekking tour services

Description: Small valley at 19 Km from Sharda with one upstream that joins Neelum River. It is an ideal place for base camping before heading to 'Sarwaali Peak' that is the highest in Azad Jammu and Kashmir.



KUNDUL SHAHI

Location: Neelum District

Investment Opportunities:

- Fishing
- Tourist boarding and lodging (Glamping Resort)
- Restaurant serving traditional food
- Trekking tour services

Description: The silvery stream, Jagran Nullah, is a hot breeding ground for trout fish.

GILGIT BALTISTAN (GB)

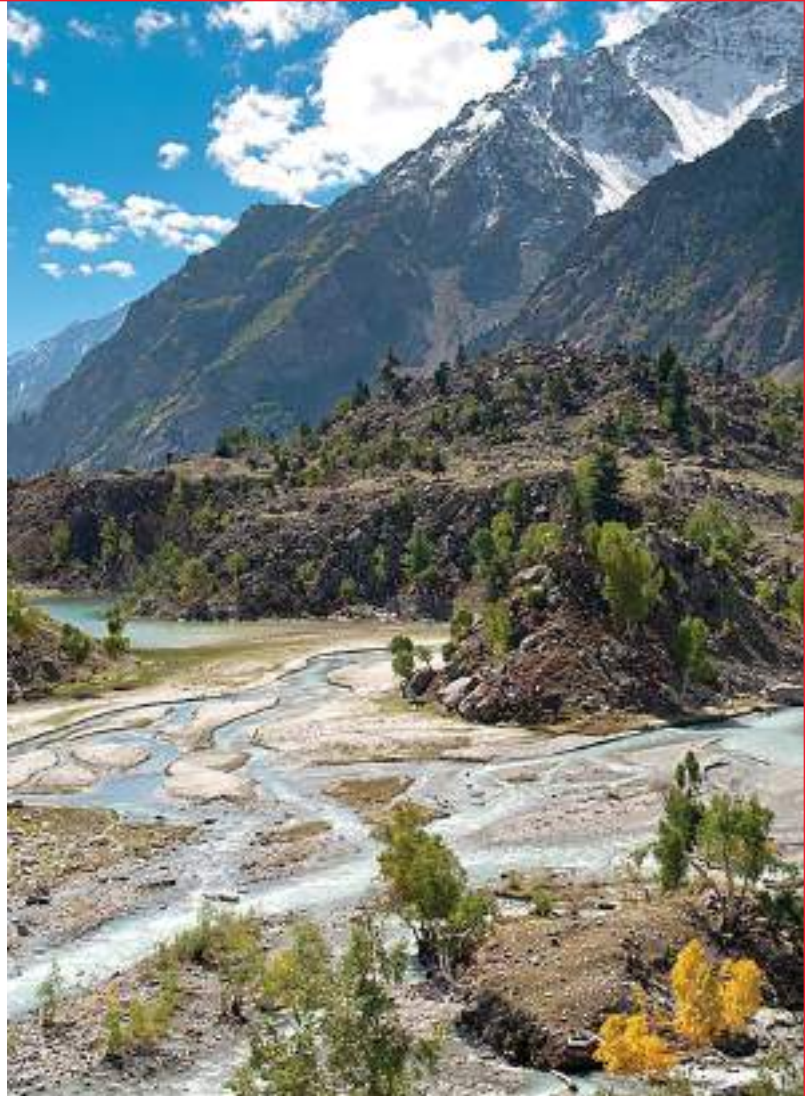
NALTAR VALLEY

Location: 40 Km from Gilgit City

Investment Opportunities:

- Skiing and resorts
- Tourist boarding and lodging (Glamping Resort)
- Restaurant serving traditional food
- Trekking tour services
- Ski Resort

Description: Dense pine forest with magnificent green vegetation, snow-capped mountains, streams, and bird sanctuary.



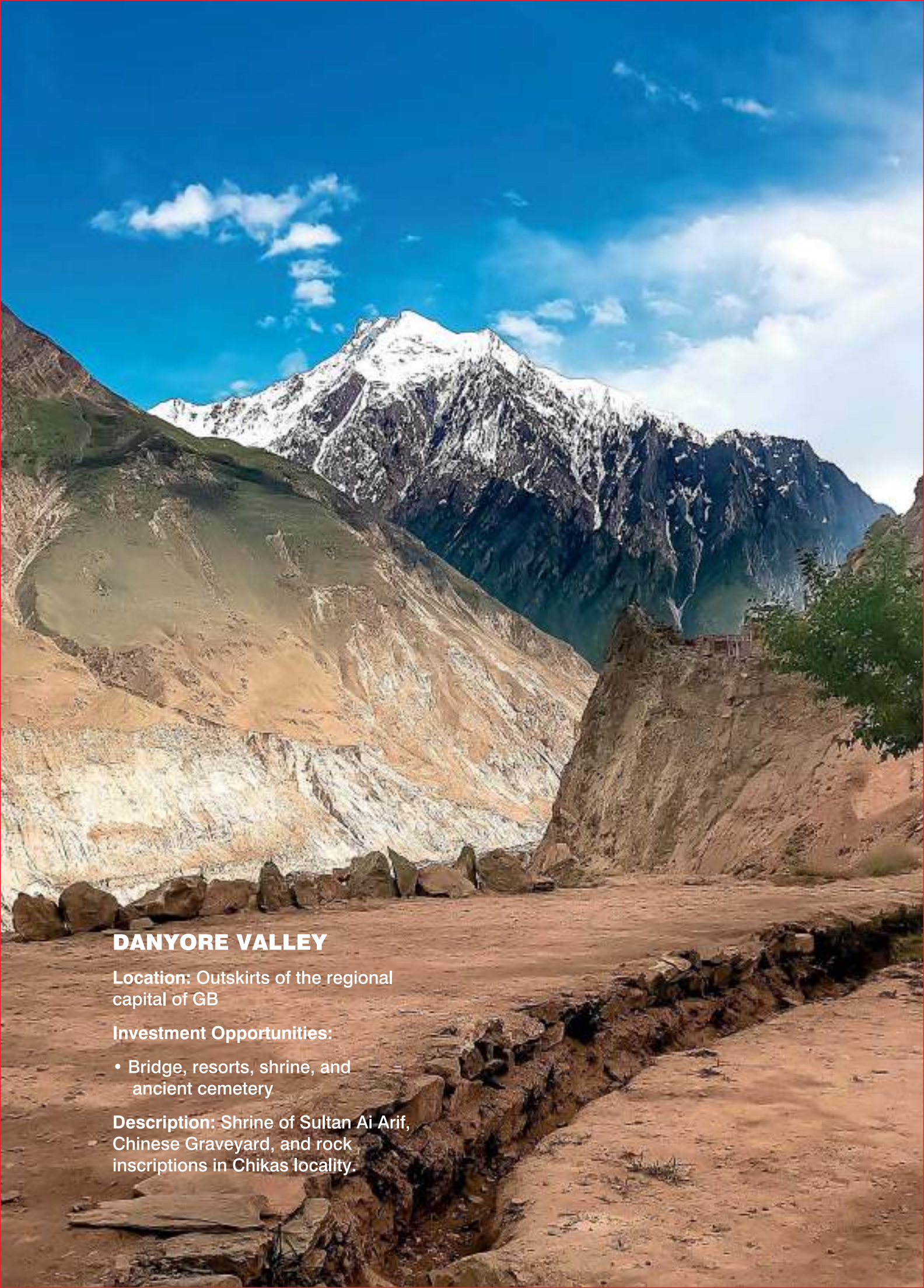
KARGAH

Location: Karakoram Mountain Range

Investment Opportunities:

- Restaurant serving traditional food
- Trekking tour services

Description: Ideal destination for both trekking and fishing.



DANYORE VALLEY

Location: Outskirts of the regional capital of GB

Investment Opportunities:

- Bridge, resorts, shrine, and ancient cemetery

Description: Shrine of Sultan Ai Arif, Chinese Graveyard, and rock inscriptions in Chikas locality.

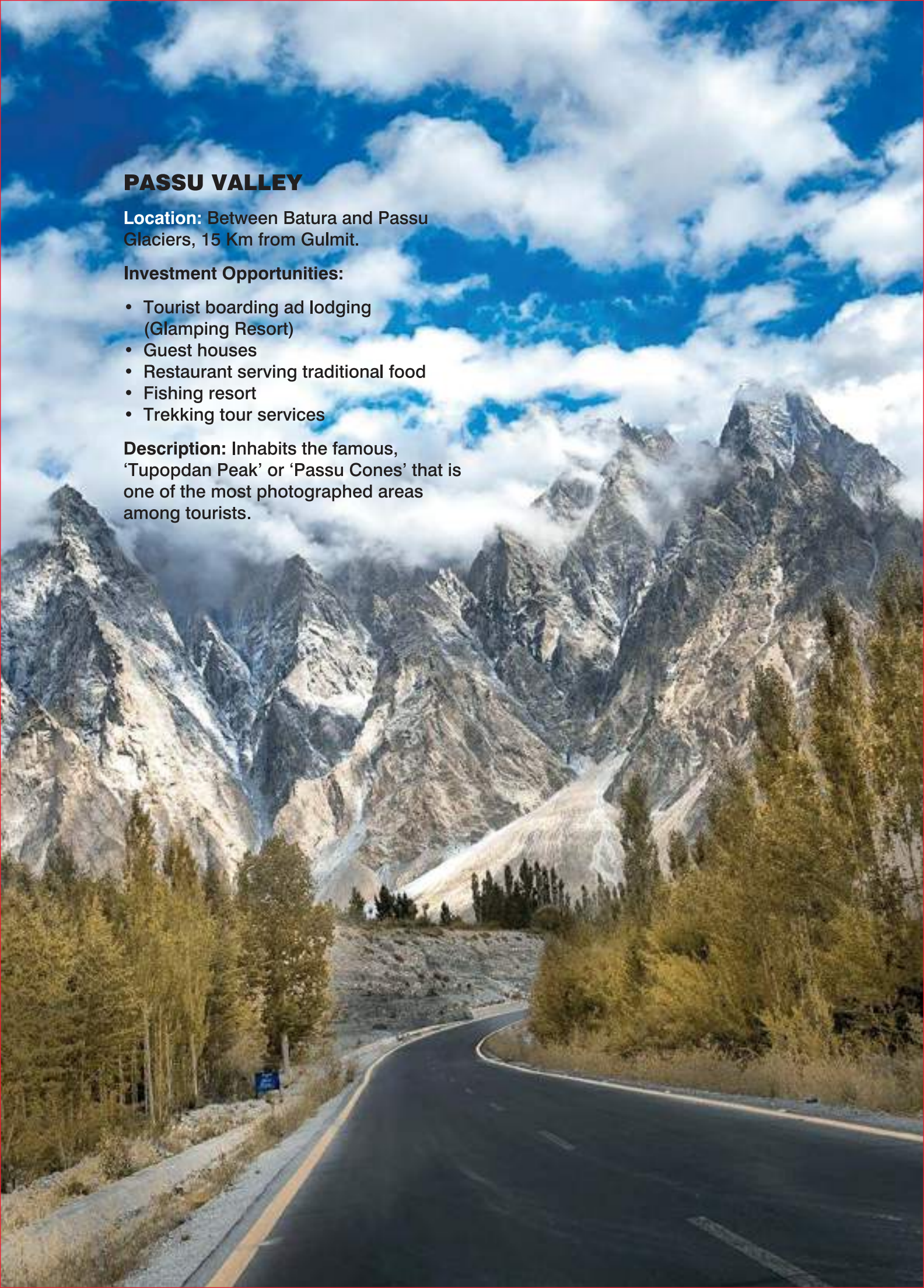
PASSU VALLEY

Location: Between Batura and Passu Glaciers, 15 Km from Gulmit.

Investment Opportunities:

- Tourist boarding and lodging (Glamping Resort)
- Guest houses
- Restaurant serving traditional food
- Fishing resort
- Trekking tour services

Description: Inhabits the famous, 'Tupopdan Peak' or 'Passu Cones' that is one of the most photographed areas among tourists.



HOPAR VALLEY

Location: 10 Km from Nagar Khas

Investment Opportunities:

- Trekking, resorts, and restaurants serving traditional food

Description: Small village with irrigated terraced fields known for fruit orchards and potatoes.



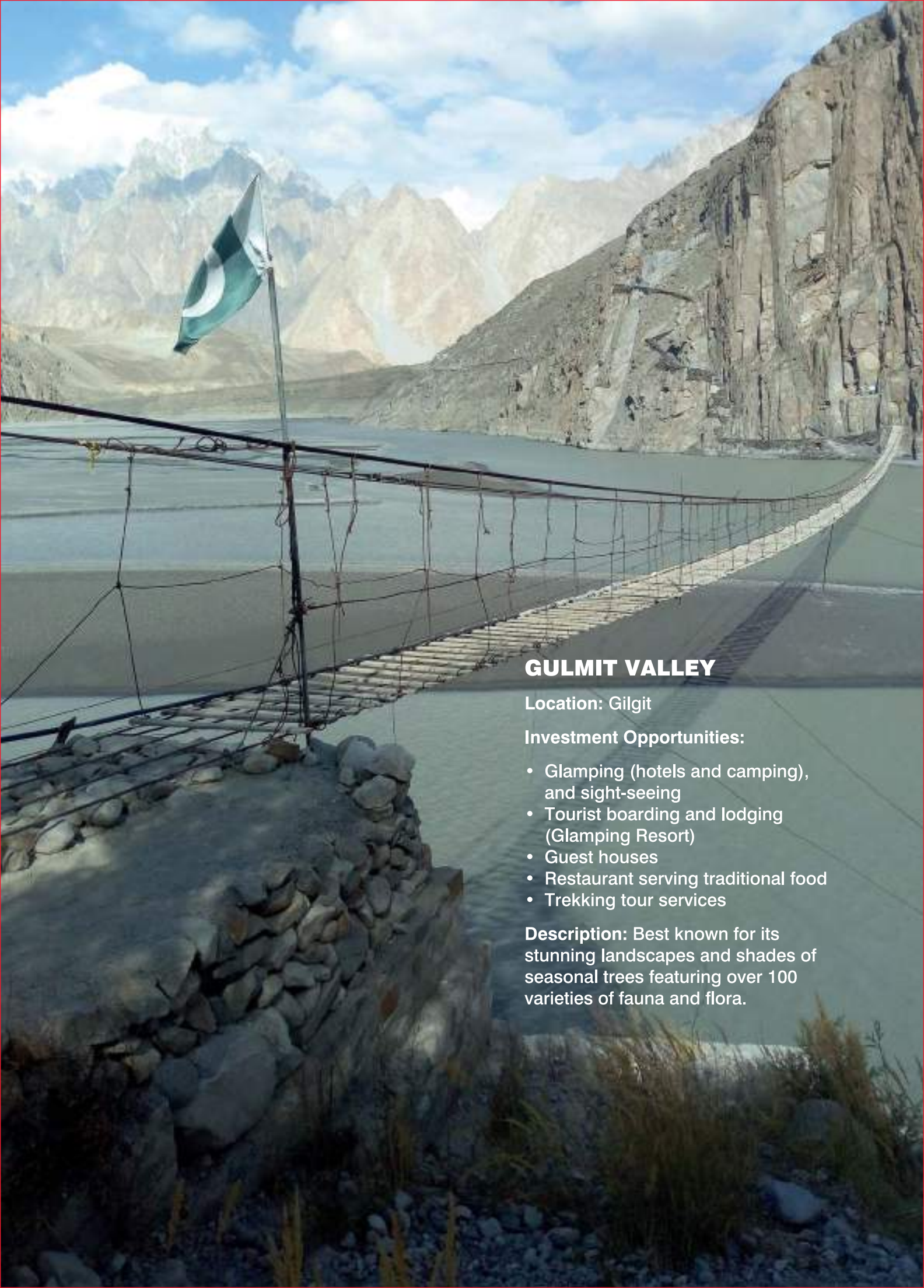
DUIKER

Location: Situated next to Baltit

Investment Opportunities:

- Tourist boarding and loding (Glamping Resort)
- Guest houses and hotels
- Restaurant serving traditional food
- Trekking tour services

Description: Charming hamlet above the village of Altit with a spectacular view of sunset and sunrise.



GULMIT VALLEY

Location: Gilgit

Investment Opportunities:

- Glamping (hotels and camping), and sight-seeing
- Tourist boarding and lodging (Glamping Resort)
- Guest houses
- Restaurant serving traditional food
- Trekking tour services

Description: Best known for its stunning landscapes and shades of seasonal trees featuring over 100 varieties of fauna and flora.



PHANDAR VALLEY

Location: 61 Km from Gupis, Ghizer District

Investment Opportunities:

- Tourist boarding and lodging (Glamping Resort)
- Fishing resort
- Guest houses
- Restaurant serving traditional food
- Trekking tour services

Description: Deep blue water and crystal-clear springs.



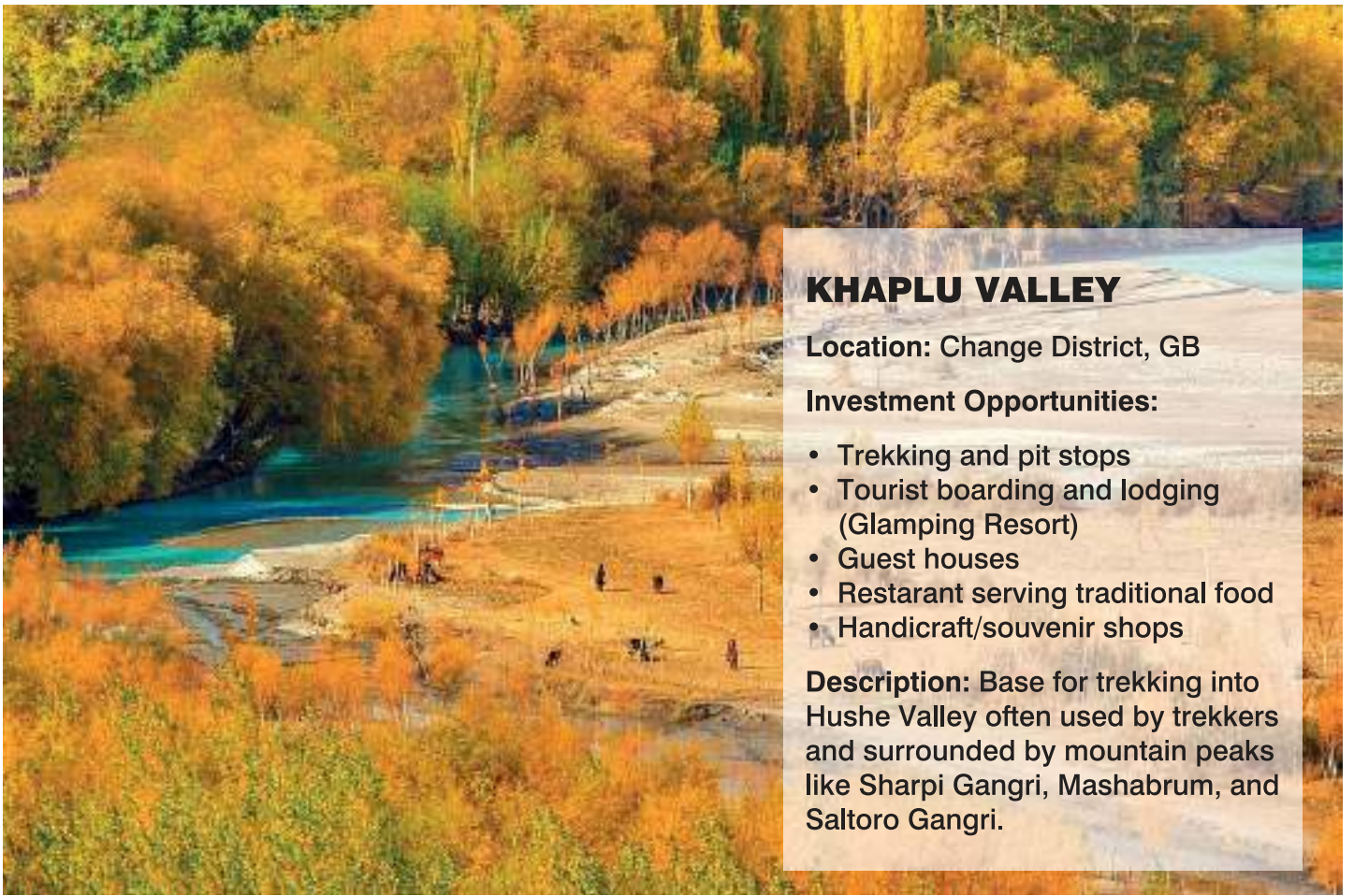
LANGAR VALLEY

Location: Swat District

Investment Opportunities:

- Camping, resorts, and fishing

Description: Surrounded by mighty mountains and trout-rich streams of water.



KHAPLU VALLEY

Location: Change District, GB

Investment Opportunities:

- Trekking and pit stops
- Tourist boarding and lodging (Glamping Resort)
- Guest houses
- Restarant serving traditional food
- Handicraft/souvenir shops

Description: Base for trekking into Hushe Valley often used by trekkers and surrounded by mountain peaks like Sharpi Gangri, Mashabrum, and Saltoro Gangri.



RAMA VALLEY

Location: Rama Village

Investment Opportunities:

- Tourist boarding and lodging (Glamping Resort)
- Guest houses
- Restaurant serving traditional food
- Trekking tour services
- Handicraft/souvenir shops

Description: Thickly forested area consisting of pine, fir, pine, and juniper trees that has its base near Quaid-e-Azam's Residency in Ziarat, Balochistan.

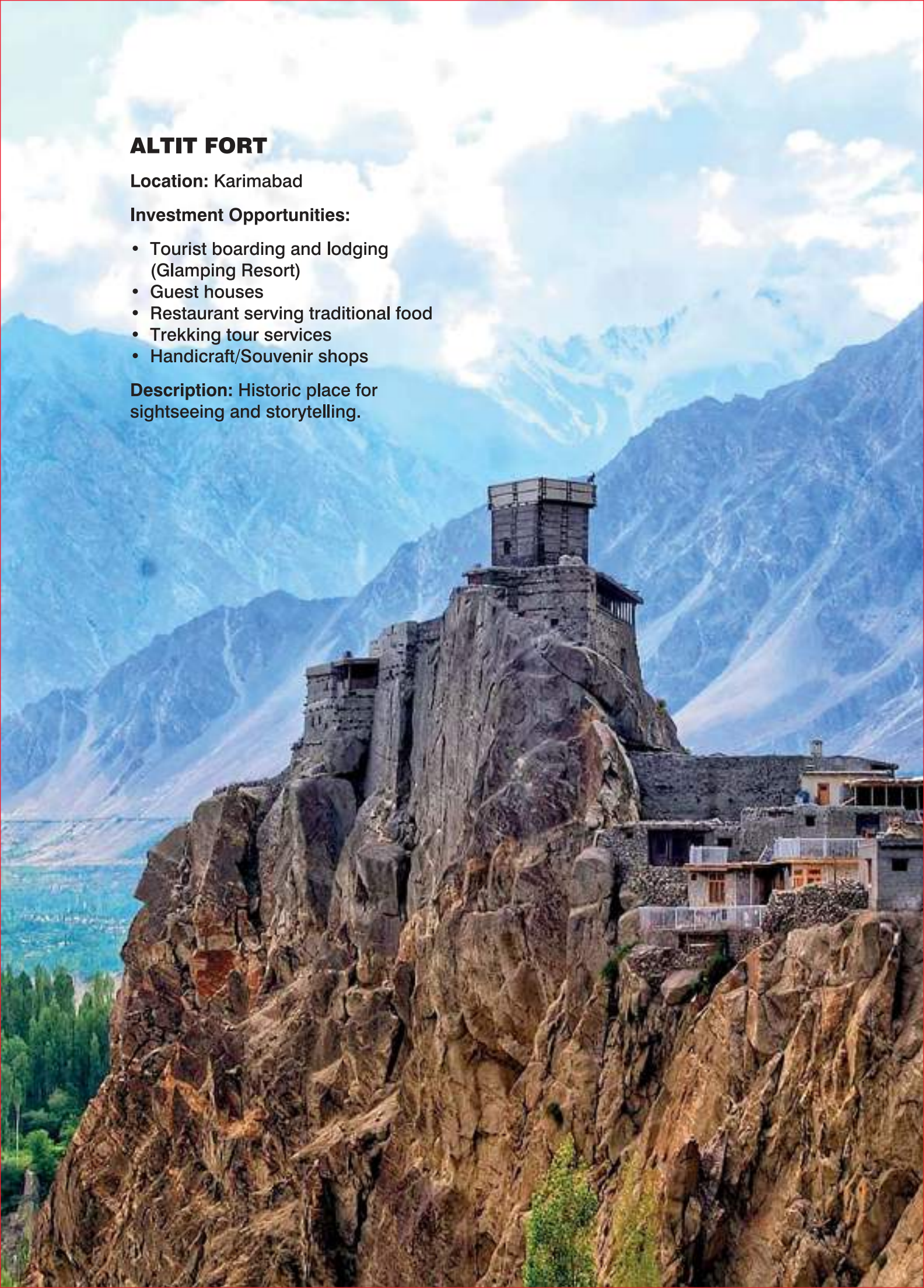
ALTIT FORT

Location: Karimabad

Investment Opportunities:

- Tourist boarding and lodging (Glamping Resort)
- Guest houses
- Restaurant serving traditional food
- Trekking tour services
- Handicraft/Souvenir shops

Description: Historic place for sightseeing and storytelling.



PUNJAB





SHALIMAR GARDENS

Location: Lahore

Investment Opportunities:

- Restaurant serving traditional food
- Guided tour services
- Handicraft/souvenir shops
- Costume photography

Description: Historic Garden featuring a collage of constructional and natural artwork materialized by a renowned noble of Emperor's Court, Khalillah Khan.



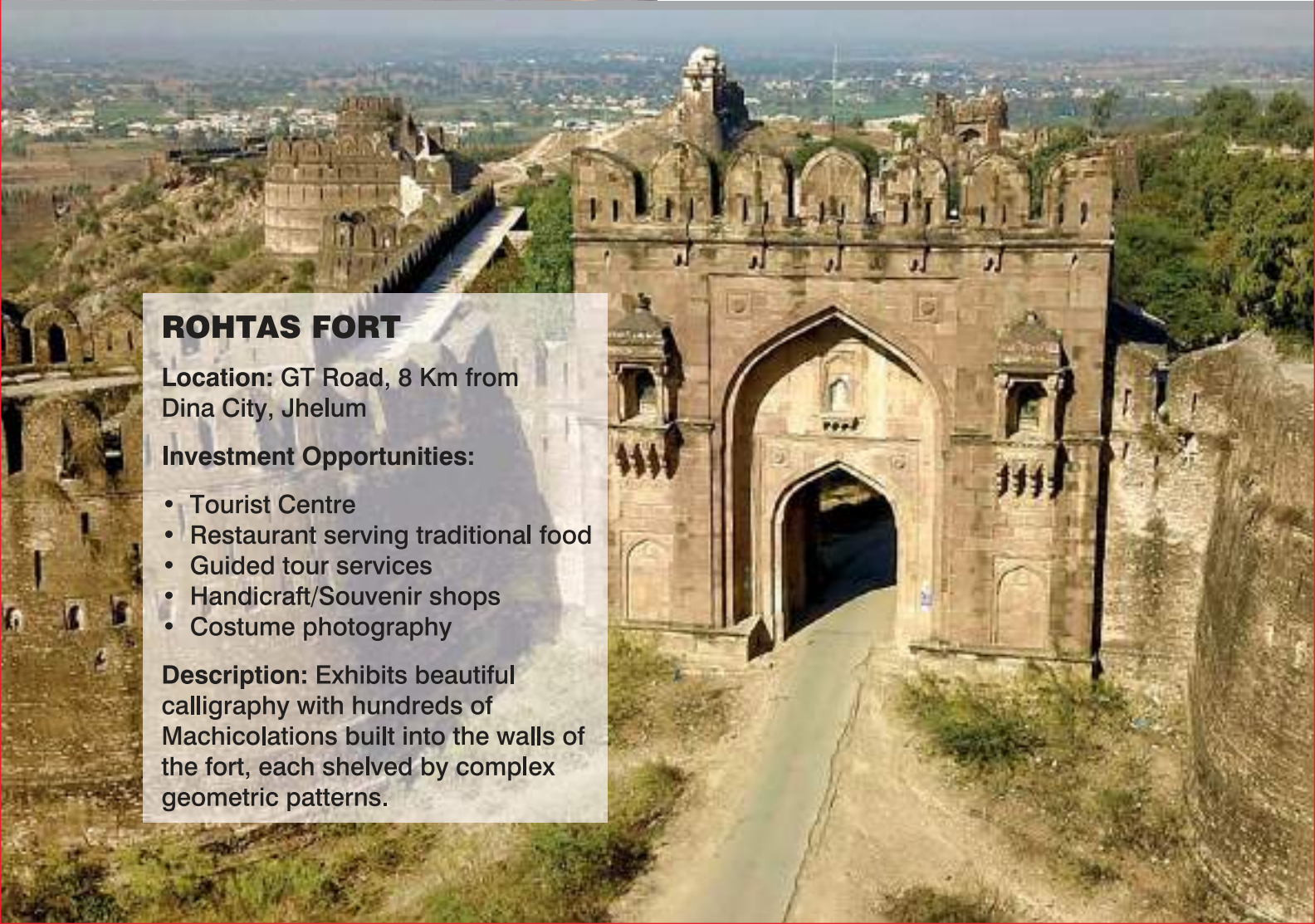
TAXILA MUSEUM

Location: Taxila

Investment Opportunities:

- Tourist motel
- Guest houses
- Restaurant serving traditional food
- Guided tour services
- Handicraft/souvenir shops
- Tourist Centre

Description: Collections of Gandhara Art dating 600 BC with a naturally pleasant environment.



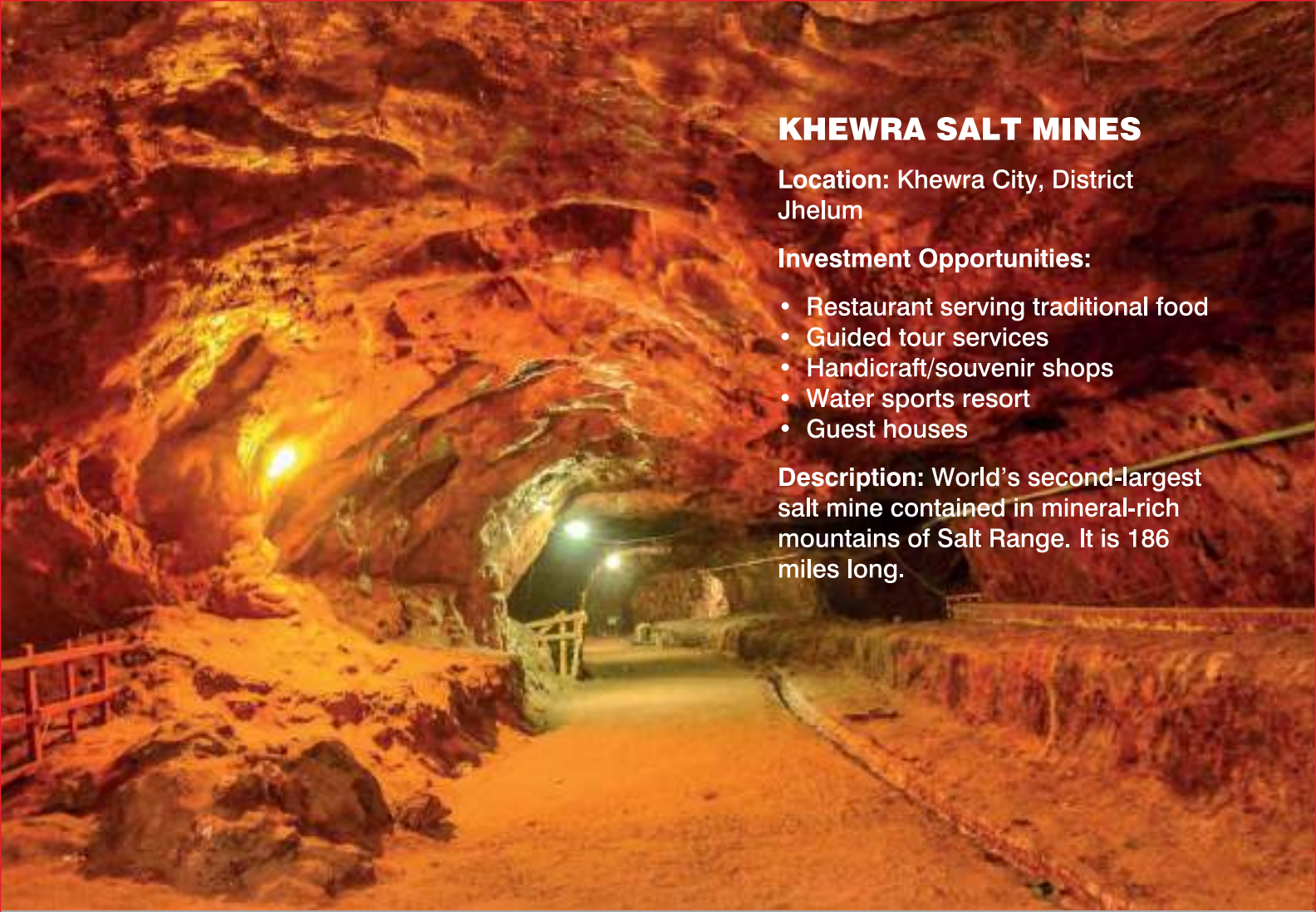
ROHTAS FORT

Location: GT Road, 8 Km from Dina City, Jhelum

Investment Opportunities:

- Tourist Centre
- Restaurant serving traditional food
- Guided tour services
- Handicraft/Souvenir shops
- Costume photography

Description: Exhibits beautiful calligraphy with hundreds of Machicolations built into the walls of the fort, each shelved by complex geometric patterns.



KHEWRA SALT MINES

Location: Khehra City, District Jhelum

Investment Opportunities:

- Restaurant serving traditional food
- Guided tour services
- Handicraft/souvenir shops
- Water sports resort
- Guest houses

Description: World's second-largest salt mine contained in mineral-rich mountains of Salt Range. It is 186 miles long.



KALLAR KAHAR

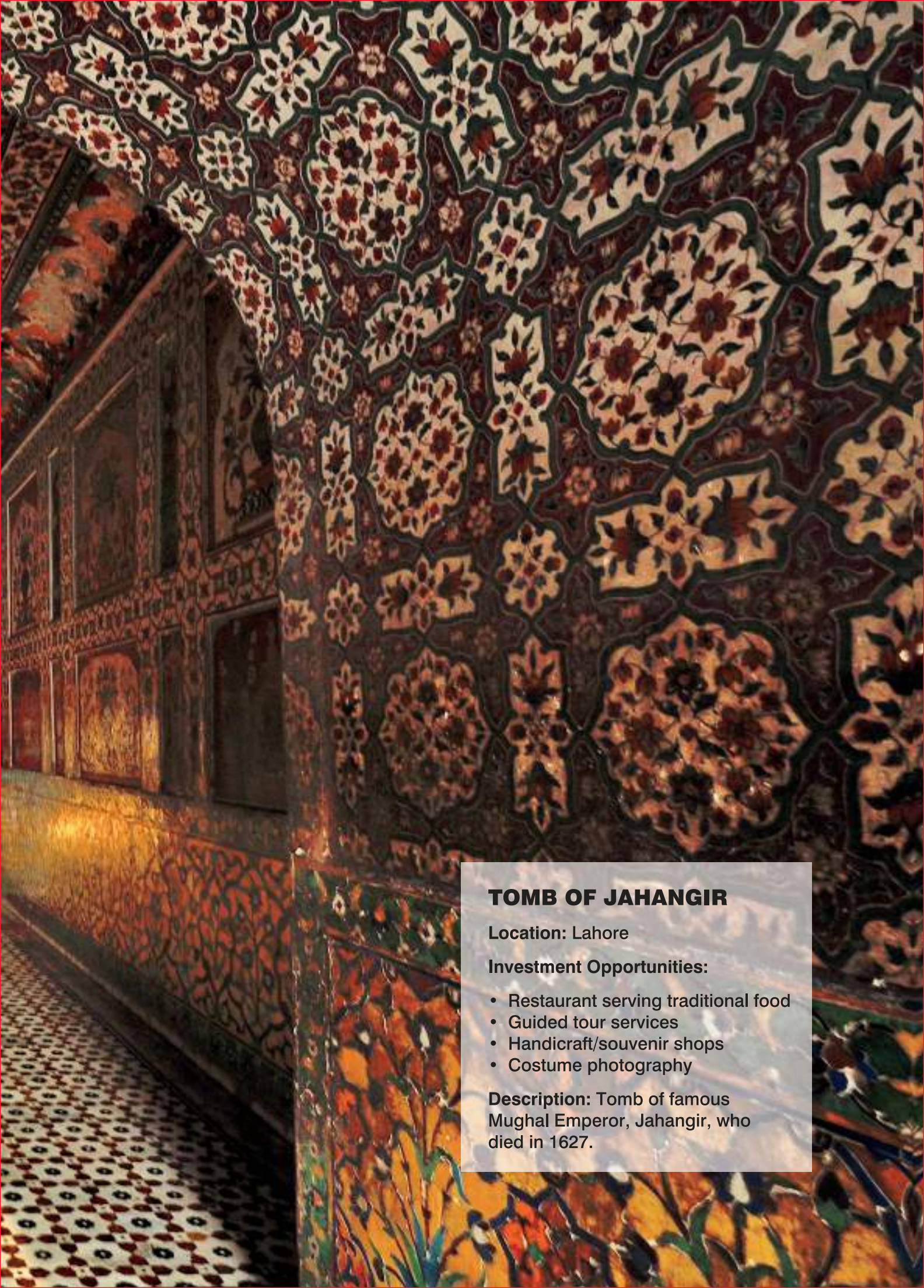
Location: 125 Km from Rawalpindi

Investment Opportunities:

- Restaurant serving traditional food
- Guided tour services
- Handicraft/souvenir shops
- Guest houses

Description: Famous for the Takht-e-Babri, exotic species of peacocks, and natural gardens.





TOMB OF JAHANGIR

Location: Lahore

Investment Opportunities:

- Restaurant serving traditional food
- Guided tour services
- Handicraft/souvenir shops
- Costume photography

Description: Tomb of famous Mughal Emperor, Jahangir, who died in 1627.



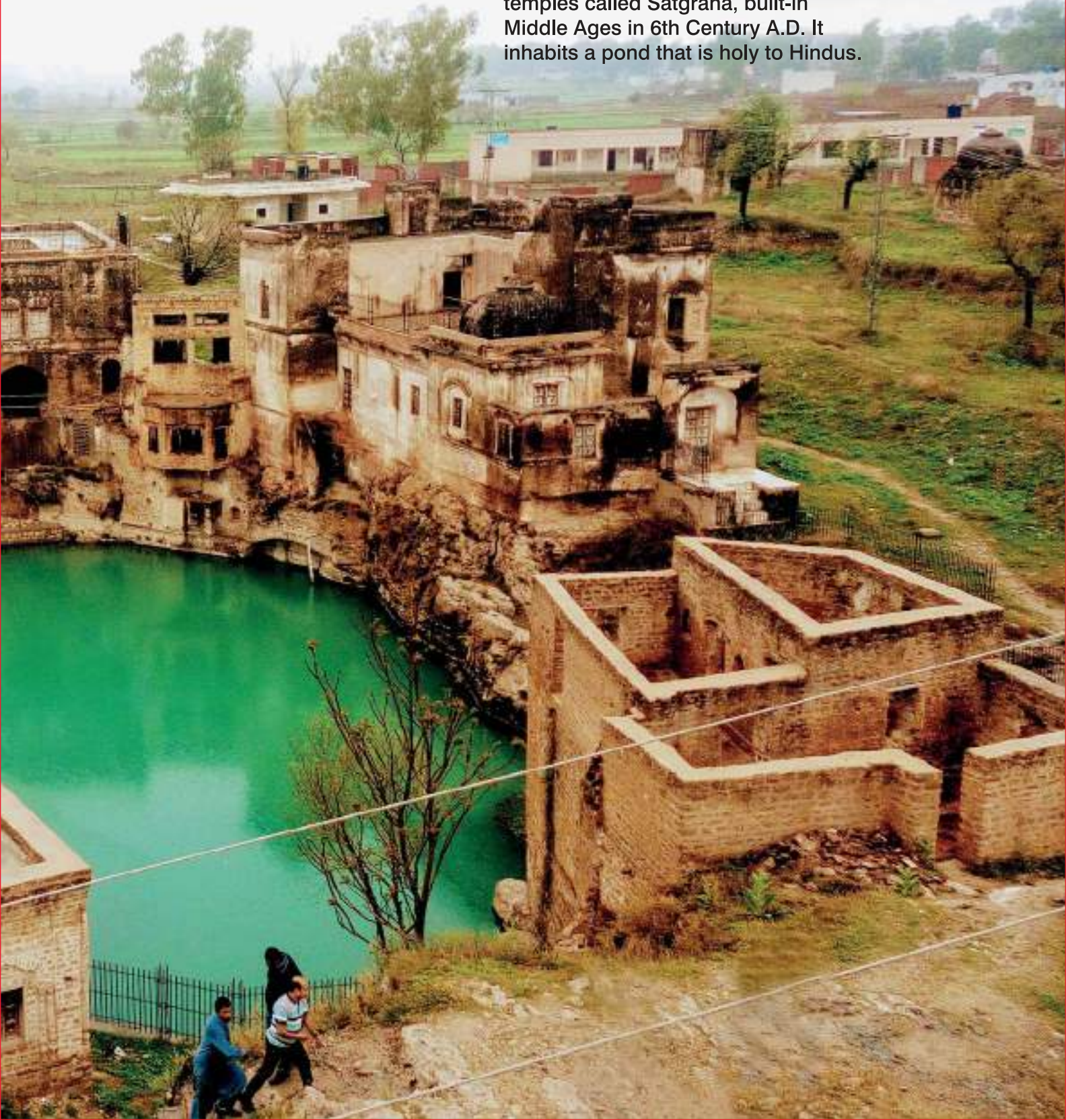
KATAS RAJ

Location: 16 Km from Kallar Kahar
and 40 Km from Chakwal

Investment Opportunities:

- Restaurant serving traditional food
- Guided tour services
- Handicraft/souvenir shops

Description: Collection of ancient
temples called Satgraha, built-in
Middle Ages in 6th Century A.D. It
inhabits a pond that is holy to Hindus.





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THE HIMALAYAS

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