

Welcome to Pakistan



the ultimate travel experience



the ultimate travel experience

THE DEVELOPMENT OF TOURISM IN THE MOUNTAIN REGIONS OF PAKISTAN



the ultimate travel experience

HISTORY AND GROWTH OF FOREIGN TOURISTS



the ultimate travel experience

FOREIGN TOURISTS

- In the 50's and early 60's Mountaineering Expeditions were self-organized and unregulated
- In 1967 first full service expedition (US K-2) organized by Walji's
- Thereafter Walji's organized cultural tours, and as no infrastructure, Government rest houses, company run lodges and Guest Houses of Royal Families of Chitral, Yasin and Hunza used; transport was company owned
- In the mid-70's popularization of "Hippie Circuit" led to growth, establishment of other private sector operators, transporters; and Government Regulations being promulgated
- In 80's road infrastructure began improving, Pakistan & China border opened leading to growth in tourists to tens of thousands
- Resulted in shortages of accommodation and overcrowding as peak was concentrated in summer months



the ultimate travel experience

FOREIGN TOURISTS (Continued)

- To accommodate own clients, Walji's had to resort to providing interest free "advances" to locals to build/expand hotels and invest in transport.
- Advances recovered from business over the course of the season
- Growth slowed because of security situation in Afghanistan, and as Afghanistan-Pakistan tourism halted
- Steady manageable growth resulted, with gradual increases in numbers until the hundred thousand number crossed in 2000
- 9/11 halted all tourism, and because of security concerns and various terrorism incidents there was only a trickle of tourists until 2015
- Growth restarted in 2016 and by 2019 had reached a few thousand, with double digit growth expected for 2020, to cross tens of thousands



the ultimate travel experience

DOMESTIC TOURISTS

- Very small numbers, generally hunting enthusiasts, until the 80's when road infrastructure developed. Even then numbers in the few hundreds
- Exception were the foothill valleys of the Himalayas and the Hindu Kush, which had vibrant numbers, due to good road infrastructure
- Resulted in unplanned, haphazard construction of restaurants and hotels with no oversight by Government
- Lack of awareness of environmental impact by visitors has degraded local environment, and “hiding away” of local cultures
- In consonance with recovery of foreign tourism in the post 2016 period, domestic tourism to the high mountain areas increased, led by the availability of better accommodation, improving road network, and fueled by social media and popular local telefilms and movies
- Numbers increased to hundreds of thousands, overwhelming the local environment



the ultimate travel experience

CURRENT SITUATION

Tourism product is diverse, with increasing specialized tours, such as Yoga Retreats and Culinary Trips. However, Winter Tourism products are lacking as is the infrastructure to support Winter Tourism



MAJOR POSITIVE IMPACT OF TOURISM

- Tourism has provided direct income to local populations, and has helped to establish cottage industries and small enterprises
- Growth has also forced Government to improve road and communications Infrastructure



the ultimate travel experience

MAJOR NEGATIVE IMPACT OF TOURISM

- **Environmental and ecological degradation due to numbers beyond the carrying capacity of the land and poor visitor awareness**
- **Erosion of local culture**
- **Dependency on income that is very sensitive to external shocks**



the ultimate travel experience

**FUTURE GROWTH,
STARTING WITH THE
WINDING DOWN OF
PANDEMIC
RESTRICTIONS
WILL BE EXPLOSIVE
DUE TO PENT-UP
DEMAND**



the ultimate travel experience

STRUCTURAL WEAKNESSES

- No studies have been conducted to determine carrying capacity of the area and thereby suggest sustainable visitor numbers
- Government oversight and regulations for tourism development are lacking, and there is no method planned for enforcement
- Tourism has been devolved from the federal level to the provincial level resulting in thinking that is neither consultative nor uniform
- Lack of tourism promotion strategies means that educative messaging to visitors to be mindful of cultural and environmental issues is not in place
- Financial and insurance products tailored to hospitality and tourism services in the SME segment are not developed



the ultimate TRAVEL experience

FUTURE
THE COVID-19 PANDEMIC
PROVIDES PLANNERS WITH
THE PAUSE NEEDED TO
DEVELOP STRATEGIES AND
THE MEANS TO ADDRESS
THESE STRUCTURAL
WEAKNESSES TO ENSURE
SUSTAINABLE TOURISM
DEVELOPMENT IN THE
COMING YEARS



the ultimate travel experience

THANK YOU



the ultimate travel experience



the ultimate travel experience