Title: Factors affecting tourism, tourism potential and strategies for development as an Industry in Pakistan.

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Abstract

_The traveler sees what he sees, the tourist see what he has come to see._
Gilbert Keith Chesterton (1874-1936) British journalist, novelist and poet

_In the middle ages people were tourists because of their religion, whereas now they are tourists because tourism is their religion._
by Robert Runcie

Pakistan is a home of approximately 160 million people and most of the population is earning less than US$ 1 per day. Pakistan just like any other beautiful European country is a big market for tourism because it offers not only beauty of nature but also variety and diversity in cultures. Infact tourism is the most profitable and entrepreneurial business, especially for people living in the mountain areas as it creates new job opportunities and reduces the unemployment level for them. But unfortunately, tourists’ visit to Pakistan is decreasing tremendously with ups and downs each year.

Therefore, the purpose of my thesis is to search for the positive and negative factors affecting the tourism industry in Pakistan, to compare the performance of our tourism industry to some potential neighbouring countries to see where Pakistan stands and lacks in terms of competitiveness, to find the role of government towards the improvment of this industry and to suggest some possible strategies for the improvement of this industry.

The primary data was collected by conducting interviews and survey questionnaires inside and outside the country from domestic and international tourists in 2007 and 2008. My son and close relatives in Belgium, Sweden and UK helped me in getting the questionnaire filled by foreigners to study their views about Pakistan as tourist place. The secondary data was collected through my personal visit to PTDC and Ministry of Tourism.

The estimated results revile that the poor accessibility, under development, fragility, marginality and the continuous social / political problems of the country are the factors that have reduced the tourist visit ratio to Pakistan. Secondly, the Government of Pakistan has also failed to implement policies and strategies that could have proved a stimulator for the tourism industry.

The conclusion drawn from the collected data is that the tourism industry of Pakistan has a lot of ups and downs in alternate years i.e. from 1995 till 2008 showing the worst year of tourism in
The reasons for this fall lie in the political and social problems of the country and lack of active participation of tourism authorities. Domestic and international tourists love the nature, culture and food of Pakistan and 80% of them want to travel around Pakistan but unfortunately the insurgency and lack of facilities have resulted in the falling rate of their travel.

My suggestions for the progress of this industry are that the Governments should show seriousness towards the tourism industry and take necessary steps like improving the tourism infrastructure, control the insurgency in the country as soon as possible, build strong relationships with outside world, portray the positive image of Pakistan via media etc so that the rank and standard of Pakistan’s tourism industry can improve globally.

Research limitations that I faced during data collection includes the limited information sharing by the PTDC and Ministry of Tourism as their data is not updated properly. Secondly there is a lot of difficulty in finding local and international potential tourists due to the political and social disturbance in the country and also the shy and introvert behaviour of the people especially women. Therefore, I also made use of the idea of conducting survey outside the country.

The important aspect or value of this research is that it has brought in to consideration almost all the important factors that are effecting the tourism industry according to the view of potential tourists and at the end provide some suggestions that can improve the current deteriorating condition of this industry.

**Keywords:**

Tourism, Pakistan, Strategy, Potential, Domestic & International Tourists, Factors, Development.
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Abbreviations

FDI .................... Foreign Direct Investment
FTS .................... Foreign Tourism Survey
GOP .................... Government of Pakistan
ICT ..................... Information and Communication Technology
MDG ..................... Millennium Development Goals
NWFP .................... North West Frontier Province
PTDC ..................... Pakistan Tourism Development Corporation
MOT ..................... Ministry Of Tourism
SWOT .................... Strengths – Weaknesses – Opportunities – Threats
SBP ..................... State Bank of Pakistan
T&T ..................... Travel and Tourism
UNESCO ................ United Nation Educational Scientific and Cultural Organization
1 INTRODUCTION

The introduction chapter gives some information on Pakistan as a tourist country, the problem statement, the aims of the research, the significance and objective of the research and the limitations of the research.

1.1 Pakistan as a tourist country

![Map of Pakistan](image1.png)

Figure 1: Map of Pakistan.

Pakistan, as shown in Figure 1, after its independence from British India appeared as a modern nation on 14 August 1947. All four provinces of Pakistan are gifted with heritage and culture and one of the fertile and unique collection of majestic and rugged mountains, lush fields, deserts, rivers, lakes, seashores and landscapes enriched with friendly and hospitable people thus making it a heavenly destination for tourists with different tastes. Pakistan is known in the world of tourism because of the mountainous regions of the north, the Hindukush, Karakoram and the Great Himalaya who form the densest concentration of high peaks in the world. Kalam (Swat valley) in Pakistan’s is known as the Switzerland of Asia. The hunza and chitral valleys in pakistan were the home to a small preislamic animist Kalasha community who claim descent from the army of Alexander the Great [1]. The historical and archaeological sites of the Gandhara and Indus Valley civilizations, Mohenjo-Daro, Taxila the Mughal Empire are the examples of oldest civilizations in Pakistan. This multicultural nature of the country also contribute to the tourism industry in the way that it offers various traditions, customs and festivals for the tourists to explore and enjoy.
1.2 Problem Statement
According to the above paragraph, Pakistan seems to be a perfect place to be visited by the tourists but still the tourists arrival is decreasing day by day if we take into consideration the years from 1995 till 2008.

1.3 Aim of the thesis
The aim of my thesis is to find the positive and negative reasons and factors which are effecting the pakistan tourism industry and identify the the cause of tourists declining ratio. Find out the role of the government towards the development of this industry and suggest some strategies that can improve this sector.

1.4 Significance and Objective of the Research
This thesis is done with a purpose (as defined in Figure 2) to investigate the factors effecting tourism in both positive and negative way. Discover the hidden potential of tourism industry. Another motivation behind this research is to examine and compare the economic effect of tourism in terms of money and job generation in our country as compared to the neighbouring countries. The value of this research lies in the facts that besides Pakistan the survey/questionnaire was also carried out abroad in order to get the view of potential tourists living outside Pakistan. The results and views obtained from the survey/questionnaire can be used by the following departments.

- PTDC (Pakistan Tourism Development Corporation) so that they can improve and stimulate the tourism industry keeping in view the domestic and international tourist opinions about the country and locations.

- UNESCO islamabad office working for the conservation and protection of world heritage sites in pakistan. They can provide funds to the tourism authority and keep a check on projects. They can also market Pakistan tourism industry to outside world.

- The data will also be provided to media people to bring in to attention the views of foreigners about Pakistan so that they can promote the positive view of Pakistan to the outside world which people are unaware of and to document the majestic places of Pakistan which are still in curtains from the world.
1.5 Limitations

Research limitations during the collection of primary and secondary data include the limited information sharing by the tourism departments. The concerned officials hesitate to pass information due to certain restrictions and privacy issues. Moreover the data provided by them was not updated properly for the past few years. So I had to organize and compare the tourism data of last fourteen years myself based on the tourism reports and websites they provided me with. Secondly, finding tourists was difficult because of the current internal war situation in Pakistan. The security systems in the hotels don’t let anyone meet the foreign tourists inside the hotel so I had to find the tourists when they visit the market or recreational areas. Most of the tourists interviewed in Pakistan were men because of the shy and introvert behaviour of the tourists. The problems I faced abroad were the language problems as their language was swedish and dutch so I had to rely on the information provided by the people who spoke english.

2 LITERATURE REVIEW AND THEORETICAL BACKGROUND

In this section I will discuss some of the available literature and compare it with my research work giving a broader picture of the unique nature of the work and its practical usefulness.

2.1 Literature Review

Kakar et al. [9], in their research thesis provided a relation between tourism and employment in Pakistan. The purpose of this research was to determine the rate of employment generated in different occupations from the tourism sector. The survey was carried out by personal visits to the hotels, restaurants, souvenir shops, travel agents, car hire firms, tour operators and airline offices. They designed a questionnaire for this purpose. The survey was restricted in the sense that it was carried out in only two cities of Pakistan i.e. Swat and Abbottabad and secondly it was carried out only in hotels and restaurants. No attempt was made to determine the total impact of tourism on different employment sectors like taxis, guides, entertainment, travel agencies etc. Furthermore the statistical data provided on the number of hotels, number of beds and the number of people employed is limited in the sense that there is no proper information about the time/date/year in which the data was recorded. Similarly Baloch [10] in his research of managing tourism in Pakistan deals with the issue of diagnosing the cause of crawling nature of Pakistan’s tourism growth and suggest ways to develop this industry through natural historical and cultural resources. The research
was carried out in Chitral valley only. The methodology used was recording the views of tourists, locals, hoteliers and data collection from PTDC and Ministry of Tourism. The research is restricted in the sense that the deteriorating condition of this industry is explained only for 2006 and there is no proper statistical data provided for Chitral valley. The data was collected from the concerned departments and there is no proper findings obtained from the tourists and hoteliers.

Although some of the studies found and discussed above are related to the tourism industry in Pakistan but there is hardly any research that focuses mainly on positive and negative factors effecting Pakistan tourism industry on a whole and compare this industry to its neighboring countries. My work focuses on factors effecting tourism, its impact on employment and the revenue earned for the whole country. The research include statistical data for last fourteen years which helped in comparing the performance of this sector with other countries also. The difference of approach lies in the fact that the methodology used was not only to personally interview the domestic and international tourists in Pakistan but also abroad. It helped me in the way that I was able to identify the strengths and weaknesses of this industry keeping in mind the opinions of tourists. The above researches only considered the findings of one year where as my thesis was focused on last fourteen years. Furthermore, there are also some proposed strategies in my work that can help in improving the existing condition of the tourism industry in Pakistan if considered by the Government, Ministry of Tourism, PTDC and even the local residence of Pakistan.

2.2 Theoretical background

Pakistan tourism industry is influenced by positive and negative factors which determine its strengths and weaknesses as explained in the figure 3. These factors are obtained by the interview and questionnaire filled by the tourists in Pakistan and abroad and also knowledge based on experience. The methodology and the empirical findings are explained in detail in chapter 3 and 4.

2.2.1 Positive factors

The tourists usually travel to see different places and things other like different climates, nature, cultures, people, customs, arts, cuisines, languages, unique festivals, old historical buildings and sites etc. The reason why Pakistan has a great potential in tourism industry is that it posses every single things that could meet the demand of visitors. Following are the types of tourism in Pakistan:
• **Heritage Tourism**

Pakistan is a home to the most spectacular ancient cities of the World including the Indus and Gandhara civilization. Taxila, Moenjodaro and Harrppa, museums, Mughal heritage and the silk route, Badshahi Masjid, Shalimar Gardens, Tomb of Jahangir and the Lahore Fort and the great heritage of Mughals in Punjab [3].

• **Religious / Spiritual or Pilgrimage Tourism**

Pakistan is also famous for its shrines and temples. Each year not only Muslims from different countries come to visit the holy shrines but also the Hindus, Sikhs and Buddhist visit Pakistan for pilgrimage [3].

• **Cultural Tourism**

Besides archaeological sites and architecture masterpieces of Mughal emperors and British antecedents, Pakistani cuisine and festivals are yet another interesting part of rich Pakistani culture. The food streets in pakistan are becoming a major source of attraction for tourists as they can enjoy the local pakistani food as well as the colorfull streets and people shopping in the streets at the same time. Famous food streets in Pakistan are Food street Gawalmandi and Anarkali in Lahore, Melody and Blue Area food street in Islamabad, Burns Road in karachi, Ghantar Ghar in Peshawar. Festivals tend to provide celebration, joy, mental and physical refreshment to not only local people but also the tourists who come with the aim to explore and enjoy different cultures and festivals. Some of the famous cultural ceremonies and festivals of Pakistan include Lok virsa mela, Horse and cattle shows, Basant or kite flying, Festival of lamps Northern areas festivals including the famous (Kalash festivals, Silk route festivals) etc [3].

• **Adventure or ECO Tourism**

Eco or adventure tourism is the most significant part of the tourism industry as Pakistan is blessed with worlds most beautiful and renowned mountains, lakes valleys, glaciers and passes. Tourists not only enjoy the site viewing but also perform activities like skiing, hiking, surfing, camping and cruising. Mountaineering and trekking are the most exciting activities that tourists enjoy. World’s second largest mountain K2 and Switzerland of Asia known as Swat Valley is also located in Pakistan. Silk route is also included among Pakistan attractions as it is an ancient route connecting east and the west. Pakistan is also a home to 31 natural and manmade lakes and reservoirs. The helicopter or train safari is also very famous among
tourists as they travel to see the most spectacular views of landscapes and mines across the country. The helicopter safari is the latest means of travelling as it takes you high in the sky so you can enjoy the highest peaks in the north and deserts in the south [3].

- **Wild Life Tourism**

There are about 14 national parks which give a beautiful glimpse of the rich Flora and Fauna of Pakistan. And there are 2 safari parks with various types of animals like tigers, lions, monkeys, elephants, giraffes, pythons, birds, deer’s etc [3].

- **Sports Tourism**

Pakistan is popular as a tourist sports destination. Himalayan range which is the world’s highest mountain range in the world demands for professional trekking along with general trekking. Other types of sports tourism include white water rafting, wild boar hunting in deep forests, shandur polo games, mountain biking, golf, ice climbing, rock climbing, snowboarding, skiing, caving and pot holding etc. Rich people and Prince come from middle east for deer hunting in pakistan [3].

All the above mentioned factors contribute positively to Pakistan tourism industry but along with these, there are also negative factors which are affecting our tourism industry and have resulted in the loss of tourists’ arrival in Pakistan.

### 2.2.2 Negative factors

The negative factors effecting Pakistan tourism industry are the views and opinions of domestic and international tourists obtained via questionnaire and interview. According to the tourists the biggest problem they are facing while travelling is security issues which include the current insurgency in Pakistan. Even the domestic tourists don’t feel like travelling in their own country. Second issue of tourists decline is the negative image of Pakistan portrayed by media to the outside world. Lack of infrastructure, ineffective promotional policies, inadequate tourist’s services and facilities, lack of initiative by concerned government departments, inadequate knowledge and training of personnel in tourism sector, law and order situation especially in the high tourist attraction areas, inadequate infrastructure facilities, lack of incentives in the tourist sector, failure to show and project the positive image of the country via media to the outside world, low allocation of annual tourist budget, lack of development and facilities in the mountain regions, lack of understanding to the tourist
needs, the overtaking and change of governments and administration within the country (army rule), high inflation rate are the key points which have altogether made tourism an unsuccessful industry in Pakistan. The tourism Ministry is not playing sufficient role and tourist faces difficulties in getting timely visa, other information's. The tourism authorities must focus on this sector as tourism is the only sector, which can contribute substantially in the poverty alleviation and improving the living standards of the local community.

**Factors Effecting Tourism**

<table>
<thead>
<tr>
<th>Positive factors</th>
<th>Negative factors</th>
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<tbody>
<tr>
<td>Presence of tourist Attractions</td>
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<tr>
<td>• Mountains</td>
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<td>• Valleys</td>
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<td>• Lakes</td>
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<tr>
<td>• Historical places</td>
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<tr>
<td>Rich culture</td>
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<td>Rich food</td>
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<tr>
<td>Salt mines</td>
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<tr>
<td>Spring festivals</td>
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<tr>
<td>5 stars hotel chains</td>
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<tr>
<td>Restaurants</td>
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<tr>
<td>Handicrafts</td>
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<tr>
<td>Museums</td>
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<tr>
<td>Business environment</td>
<td></td>
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<tr>
<td>Security problems for the tourists especially 2007-2008</td>
<td></td>
</tr>
<tr>
<td>Less Marketing and publicity at international level</td>
<td></td>
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<tr>
<td>weak travel and tourism framework</td>
<td></td>
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<tr>
<td>Low allocation of annual tourist budget</td>
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<tr>
<td>High inflation rate</td>
<td></td>
</tr>
<tr>
<td>Overtaking and change of governments</td>
<td></td>
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<tr>
<td>Lack of initiative by concerned government departments</td>
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</table>

*Figure 2: Factors effecting tourism (source: questionnaires).*
3 METHODOLOGY

The methodology I choose to collect data was through personal interviewing and questionnaire filling in Pakistan and abroad.

3.1 Primary Data

As discussed earlier, there are many researches done in the area of tourism related to marketing or employment opportunities but so far there were no researches done on the fact that why tourism arrival rate is declining day by day in Pakistan. For this purpose, I designed a questionnaire to personally visit and meet the domestic and international tourists in Pakistan and also abroad. I interviewed 15 people in Pakistan including men and women. 09 of them were international tourists and 6 of them domestic. I was able to find and interview the international tourists because I live in the capital of Pakistan. Most of the tourists like to stay here because it is the most modern city in terms of hotels, transport, food chains and shops. The markets and restaurants are open till late at night and it is easy to find and interview people. Another plus point for my research proved to be my visit to Sweden and Belgium in 2007 and 2008. I was able to interview 16 people in Sweden and Belgium altogether belonging to different nationalities and origin. The information obtained via questionnaire and interview helped me in determining the positive and negative factors affecting the tourism industry in Pakistan. Based on that I was also able to design the swot analysis for the tourism industry.

3.2 Secondary Data

In order to verify the decrease in tourists arrival statistically, the best possible solution for me was to visit the Ministry Of Tourism and PTDC. The information given is combined together in form of tabel.1 on page 23 which explains the tourists’ arrival in numbers and the revenue earned from the years 1995 till 2008. This visit helped me to analyze and compare the performance of Pakistan tourism industry in previous years and also compared its performance with its neighbouring countries like China and India in order to compare its global ranking, Regulatory Frameworks, Business Environment and Infrastructure, Human Cultural and Natural Resources etc.

3.3 Reliability of the data

In order to verify the reliability of the data I selected multiple samples for the same data and found that on average the data was reliable. Secondly, this was the most reliable way and source to gather the data for my thesis because it is the real life people who can explain the concerns and problems
they face during their travel. The information extracted from the tourists is not based on assumptions but it represents the actual views and opinions of the tourists. I also had the opportunity of visit Sweden and Belgium in 2007 and 2008 for the purpose of tourism and visiting my son and friends. I was able to interview and did the questionnaire filling with few foreigners belonging to different nationalities like China, UK, Germany, Belgium and Sweden. The purpose was to know what they think about Pakistan and its tourism industry. Therefore, my first purpose of determining the positive and negative factors affecting Pakistan was gathered via questionnaire and interview.

3.4 Limitation of the Methodology

The back draw of data selection via interview/questionnaire is that people are shy in Pakistan especially the women and the reliability also depend on the mood of the tourist being interviewed. Secondly, the international and domestic tourists are difficult to find and interview at this time because of the current insurgency problem in Pakistan. People don’t travel around much because of the security reasons. So the possible alternative solution might be that the interview can be carried out via telephone or personal visit in the hotels where tourists are staying. But even this can be a problem because the Hotel management will not allow this, again because of security issues.
4 EMPIRICAL FINDINGS AND ANALYSIS

In this section I will discuss my empirical findings and present my critical analysis on my findings from my research observations.

4.1 SWOT Analysis for Pakistan

Tourism has an important role to play for many countries and regions especially the developing countries like providing employment chances, to improve infrastructure and superstructure, to grow economy and to maintain environment. This study intends to determine tourism potential of Pakistan with SWOT analysis. With this analysis, strengths, weaknesses, opportunities and threats of tourism potential (the economy and human resources, quality of life, quality of environment, transport, technical infrastructure etc.) and necessary requirements to improve the tourism in Pakistan will be determined. Secondly the SWOT analysis mentioned below represents the opinions and experiences of the tourists in Pakistan. I have arranged and combined their opinion in the form of SWOT analysis of Pakistan Tourism industry.

Figure 3: SWOT Analysis.
### 4.1.1 Strengths of Pakistan’s Tourism Industry

- Ancient Indus Valley Civilization and archeological sites like (taxils,mohinjadaro,ghnndara etc)
- Museums
- Mughal architecture (gardens, mosques, buildings)
- The Marakan Coastline
- The Silk Road
- K-2 (the second largest peak in the world)
- Switzerland of Asia Swat Valley
- Kaghan valley
- Beauty for four seasons
- Salt mines in Pakistan
- One of the world’s most beautiful lakes
- Glaciers and Himalayan mountain ranges (best for mountaineering, skiing, trekking)
- Spring festivals (kite flying, horse dancing, dances, concerts)
- Pakistani food/food streets Pakistan
- Pakistani culture
- Lok virsa Festival Pakistan
- Cheap hotel reservations
- Variety of shopping items (dresses, handmade carpets, gems and jewellery etc)
- Rich with natural resources
- Land for investment and starting a business
- Huge labor market availability
- 5 star hotels and restaurants

### 4.1.2 Weaknesses of Pakistan’s Tourism Industry

- Lack of infrastructure/facilities
- Ineffective promotional policies
- Inadequate tourist’s services and facilities
- Lack of initiative by concerned government departments
- Inadequate knowledge and training of personnel in tourism sector
- Law and order situation especially in the high tourist attraction areas (Northern areas)
- Lack of tourists needs like ATM machines, visa card acceptance
- Failure to show and project the positive image of the country via media to the outside world
- Low allocation of annual tourist budget
- the continued absorption of public expenditures by defense and interest payments
- dependent on foreign aid donors
- Lack of development facilities in the mountain regions
- Lack of understanding to the tourist needs
- The overtaking and change of Governments and administration within the country
- Insufficient financial resources
- High inflation rate
- Underdeveloped roads and northern areas
- Immigration from neighbouring countries stimulating the already existing problems like increasing noise, traffic, housing, pollution, violence, robbery problems
- Inadequate garbage system
- Incentives for investments in Pakistan

- PTDC offers only 02 hotels and 29 motels located throughout Pakistan where as all the 5 star hotel chains are private [2].

<table>
<thead>
<tr>
<th>4.1.3 Opportunities for Pakistan’s Tourism Industry</th>
<th>4.1.4 Threats to Pakistan’s Tourism Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Marketing our heritage sector properly to the Far Eastern travelers</td>
<td>- General economic downturns</td>
</tr>
<tr>
<td>- Innovation in mountaineering and trekking as it has reached its saturation point because there is hardly any peak left now for the mountaineers to climb.</td>
<td>- Terrorism and insurgency in Pakistan</td>
</tr>
<tr>
<td>- New hotel chain projects by foreign investors like Prince Agha khan</td>
<td>- No availability of training centres</td>
</tr>
<tr>
<td>- Taxila visitor area development with hotels and restaurants</td>
<td>- Lack of administration</td>
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<tr>
<td>- Stability in the country (law and order)</td>
<td>- Little knowledge of English and other foreign languages by local people/low literacy rate</td>
</tr>
<tr>
<td>- Use of knowledge and experience of developing countries and foreign bodies like unesco</td>
<td>- Budgets uncertainties by changing governments</td>
</tr>
<tr>
<td>- Partnerships and investments by foreigners</td>
<td>- Lack of qualified and trained staff</td>
</tr>
<tr>
<td>- Positive image of Pakistan via media</td>
<td>- Inflation</td>
</tr>
<tr>
<td>- Well-established tourism marketing efforts(arranging meetings, incentives, conventions and exhibitions market)</td>
<td>- Pollution problems</td>
</tr>
<tr>
<td>- Environmental development and improvement</td>
<td>- Electricity availability</td>
</tr>
<tr>
<td>- Upgrading of transport facilities(more airport facilities,motorways and introducing tram system)</td>
<td>- Shortage of water</td>
</tr>
<tr>
<td>- Emphasis on community based tourism to promote local products and ownership</td>
<td>- Liquor Ban decision for Tourists by religious tourism minister</td>
</tr>
<tr>
<td>- Willingness for innovation</td>
<td>- Events like 9/11</td>
</tr>
<tr>
<td>- Good relations with other countries</td>
<td>- Lack of awareness of tourism need and potential in Pakistan</td>
</tr>
<tr>
<td>- Integration</td>
<td>- Increasing competition with the neighbouring countries</td>
</tr>
<tr>
<td></td>
<td>- Changing laws and policies for travel agents</td>
</tr>
</tbody>
</table>
• Advancements in IT
• Accurate and up to date statistical data
• Working on MDG (millennium development goals) with UNESCO to eradicate poverty via tourism
• Sustainable development in this sector
• Emphasis on domestic tourism
• Participation in international events

According to the SWOT analysis and the opinion of people whom I interviewed and filled the questionnaire, Pakistan tourism industry has many strengths and potentials as mentioned in the table above, for example, it possess nature, highest mountains, archaeological and architect sites, amazing culture, tasty foods, festivals throughout the seasons, handicrafts, rich natural resources along with four seasons to explore. Pakistan tourism industry is still cheap for the foreigners as 1$ equals 86 rupees of Pakistan. Pakistan has hotels and restaurants ranging in quality and price from lowest or guest paid houses to highest quality and price like Marriott, Holiday Inn, Sheraton, Serena Centurus Islamabad worlds second 7 star hotel, etc. similarly the tourists can enjoy local to international high quality and price food chains like KFC, Mc Donald's, Pizza Hut, Burger King etc. Shopping in Pakistan is quiet cheap for foreigners as they love to shop for leather items, handmade carpets, decoration items, Pashmina shawls, embroidered shirts/shoes, gems and jewellery etc.

The biggest negative factor effecting Pakistan according to foreign tourists and even the domestic tourists is that they don’t feel safe anymore to visit Pakistan. Before 2007, there was unrest in the country due to political reasons that was still ok for the tourists to visit but after 2007 it became impossible for the tourists to visit because on insurgency in Pakistan which leads to suicide bombing mostly in public places/ hotels and kidnapping of foreigners especially in the northern areas of Pakistan like Swat valley which was once known as the Switzerland of Asia. According to local tourists interviewed, these kinds of activities are mentally and psychologically disturbing not only elders but also children. Due to this reason the foreign embassies in Pakistan are also in jeopardy. Media is portraying this dark image of Pakistan all around the world which is resulting in decline of
tourists’ arrival in Pakistan. The decrease in tourists’ arrival statistically is shown in Table.1 obtained from the ministry of tourism below.

Other problems faced by domestic and international tourists are the lack of facilities especially in the northern areas of Pakistan which are the most beautiful places to visit. The lacking facilities include the unavailability of high quality hotels and restaurants. Most of the motels are provided by PTDC which don’t reach and meet the high expectations of foreign tourists. The comparison of hotels is shown below in the pictures. Figure 2 is the image provided to me by the PTDC and the Figure 3 is the picture of a 7 star hotel in Islamabad taken from the internet. If we compare these two hotels, there is a huge difference in terms of facilities provided. Almost all the 5-7 star hotels are private.

![Figure 4: PTDC motels in northern areas](image)

![Figure 5: Serena 7 star hotel in capital city](image)

The lack of internet and cellular service in most parts is a big problems faced by tourists. Lack of good banking facilities like ATM machines, credit or visa card acceptance is also an issue for tourists. Transport facilities are not up to the standard of foreign tourists if we compare it to the transport system in Europe or USA. Usually the tourists have to travel via taxis or buses. Train or tram system is not common in Pakistan. So time saving is not so easy in Pakistan. Land sliding in mountain areas is common and the roads are not of the best quality and ultimately they are not safe.
Most of the people in Pakistan are uneducated especially if you go to other provinces than Punjab. Therefore the role of tourists guide is really important but unfortunately this is not a common practice in Pakistan. Most of the bus or taxi drivers are uneducated so language problem is a big issue for foreign tourists. According to one of the foreign tourist I interviewed in the capital city, it is easy to travel and shop in Islamabad but it becomes more and more difficult if we go out to the mountain areas or undeveloped places. According to the foreign tourists the warm temperature of Pakistan especially in summers is unbearable for them. Therefore, pollution and high electricity load shedding is also a big problem for foreign tourists.

According to few domestic tourists I interviewed: factor affecting tourism in negative way include high inflation rate. People are living from hand to mouth and have no money to travel. Tourism is becoming a leisure activity for elite class only. Government is spending so much money on defence and war on terrorism that it has no money left to allocate for tourism industry.

The opportunity for Pakistan tourism industry to progress according to the view of international and domestic tourists is that the government should take serious and quick action towards country internal peace and security. Media should play a positive role in portraying the positive image of Pakistan also. According to people TV programs like don’t tell my mother and true images of Pakistan are good documentaries shown on national and international channels like national Geographic’s. These programs show the good side of Pakistan. Government should also train people in this area. The local community should also play their role towards the development of this sector like keeping the country clean, providing tourists with guest houses with the availability of important facilities like internet and safe food. People in most parts of the country are conservative in their thinking and don’t accept the western dresses of women. Therefore in order to promote
tourism each and every citizen of Pakistan should play a positive role by being hospitable and welcoming in every aspect.

4.2 Analysis of Tourism Potential in Pakistan

The questionnaire below was designed in order to gather the view of the potential tourists inside and outside the country. The information collected from the questionnaires (in Tables-6 to 12) helped in determining the positive and negative factors affecting tourism industry and determining new strategies to help raise the level of tourism in Pakistan. For example, according to the data collected from the questionnaires about 80% of people want to visit Pakistan because of its scenic beauty, culture and heritage. But the only concern to these people is the social and political stability of Pakistan which is keeping them away from visiting Pakistan.

Table 1: Domestic and international Tourists in Pakistan.

<table>
<thead>
<tr>
<th>Number of people interviewed in Pakistan</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>32</td>
<td>17</td>
<td>27</td>
<td>44</td>
<td>53</td>
<td>25</td>
<td>68</td>
<td>41</td>
</tr>
<tr>
<td>Gender</td>
<td>M</td>
<td>M</td>
<td>F</td>
<td>M</td>
<td>M</td>
<td>M</td>
<td>M</td>
<td>F</td>
</tr>
<tr>
<td>Nationality</td>
<td>Italy</td>
<td>Pakistan</td>
<td>Japan</td>
<td>Pakistan</td>
<td>UK</td>
<td>UK</td>
<td>Pakistan</td>
<td>Pakistan</td>
</tr>
<tr>
<td>Number of visits to Pakistan</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Desire to visit Pakistan in future</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Idea to travel Pakistan</td>
<td>Round tourism</td>
<td>Visit family in Sindh province</td>
<td>Round tourism</td>
<td>Northern areas beauty</td>
<td>Trip with friends</td>
<td>Round tourism</td>
<td>Exploring my country beauty</td>
<td>Want to see all my country</td>
</tr>
<tr>
<td>Booking of your transport</td>
<td>Self</td>
<td>self</td>
<td>self</td>
<td>self</td>
<td>internet</td>
<td>self</td>
<td>self</td>
<td>self</td>
</tr>
<tr>
<td>Internet booking willingness</td>
<td>no</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Purpose of visit</td>
<td>Round trip</td>
<td>Active holiday</td>
<td>Active holiday</td>
<td>Cultural holiday</td>
<td>Eco tourism</td>
<td>Mountaineering/trekking</td>
<td>Eco tourism/relaxation</td>
<td>Shopping/nature</td>
</tr>
<tr>
<td>Length of stay</td>
<td>15 days app</td>
<td>2 weeks app</td>
<td>1 week app</td>
<td>3 weeks app</td>
<td>3 weeks app</td>
<td>10 days app</td>
<td>1 week app</td>
<td>10 days app</td>
</tr>
<tr>
<td>Type of accommodation</td>
<td>hotel</td>
<td>family</td>
<td>hotel</td>
<td>hotel</td>
<td>hotel</td>
<td>friend</td>
<td>hotel</td>
<td>Friends/family/hotel</td>
</tr>
<tr>
<td>Means of transport</td>
<td>bus</td>
<td>car</td>
<td>bus</td>
<td>bus</td>
<td>Taxi/bus</td>
<td>bus</td>
<td>bus</td>
<td>bus</td>
</tr>
<tr>
<td>Expense per month</td>
<td>100 EUR app</td>
<td>150 EUR app</td>
<td>100 EUR app</td>
<td>200 EUR app</td>
<td>250 EUR app</td>
<td>100 EUR app</td>
<td>80 EUR app</td>
<td>100 EUR app</td>
</tr>
<tr>
<td>Expense per day</td>
<td>10-15 EUR app</td>
<td>10-20 EUR app</td>
<td>10-20 EUR app</td>
<td>10-15 EUR app</td>
<td>20-30 EUR app</td>
<td>10-20 EUR app</td>
<td>15 EUR app</td>
<td>20 EUR app</td>
</tr>
<tr>
<td>Problems faced or fear to encounter</td>
<td>security</td>
<td>inflation</td>
<td>electricit y</td>
<td>no</td>
<td>Internet banking facilities</td>
<td>ATM</td>
<td>security</td>
<td>ATM/electricity</td>
</tr>
</tbody>
</table>
The green table indicate the domestic and international tourists interviewed in Pakistan during 2007 and 2008. The table include information like number of people interviewed, age, gender, nationality,
purpose of visit, complaints, liking, expenses etc. According to international and domestic tourists, Pakistan is a beautiful place to visit full of nature and culture with spicy tasty food but the problems like security and banking facilities must be improved in order to boost its tourism industry.

Table 2: Potential Tourists in Sweden.

<table>
<thead>
<tr>
<th>Number of people interviewed in Sweden</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>25</td>
<td>23</td>
<td>30</td>
<td>29</td>
<td>41</td>
<td>24</td>
<td>29</td>
</tr>
<tr>
<td>Gender</td>
<td>M</td>
<td>M</td>
<td>F</td>
<td>M</td>
<td>F</td>
<td>F</td>
<td>F</td>
</tr>
<tr>
<td>Nationality</td>
<td>Sweden</td>
<td>Sweden</td>
<td>Holland</td>
<td>Sweden</td>
<td>Sweden</td>
<td>China</td>
<td>China</td>
</tr>
<tr>
<td>Number of visits to Pakistan</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>-</td>
<td>1</td>
<td>-</td>
</tr>
<tr>
<td>Desire to visit Pakistan in future</td>
<td>yes</td>
<td>Yes</td>
<td>yes</td>
<td>no</td>
<td>Yes</td>
<td>yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Idea to travel Pakistan</td>
<td>Class friends</td>
<td>Class friends</td>
<td>TV</td>
<td>friend</td>
<td>TV</td>
<td>Father friend</td>
<td>-</td>
</tr>
<tr>
<td>Booking of your transport/ if you visit</td>
<td>agent</td>
<td>agent</td>
<td>internet</td>
<td>Travel agent</td>
<td>internet</td>
<td>uncle</td>
<td>Agent/internet</td>
</tr>
<tr>
<td>Internet booking willingness</td>
<td>Yes</td>
<td>yes</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
<td>Yes</td>
<td>yes</td>
</tr>
<tr>
<td>Purpose of visit/ if you visit</td>
<td>nature</td>
<td>famous mountains and valleys</td>
<td>culture</td>
<td>Heritage/culture</td>
<td>food</td>
<td>Explore Pakistan</td>
<td>Nature/culture</td>
</tr>
<tr>
<td>Length of stay/ if you stay</td>
<td>1 week app</td>
<td>Don’t know</td>
<td>15 days app</td>
<td>As long as I could</td>
<td>Week app</td>
<td>2 weeks app</td>
<td>10 days app</td>
</tr>
<tr>
<td>Type of accommodation/ if you visit</td>
<td>hotel</td>
<td>camping</td>
<td>hotel</td>
<td>Hotel/friend home</td>
<td>hotel</td>
<td>uncle</td>
<td>5 star hotel</td>
</tr>
<tr>
<td>Means of transport/ if you visit</td>
<td>taxi</td>
<td>Bus/train &amp; helicopter</td>
<td>taxi</td>
<td>car</td>
<td>Rent a car</td>
<td>car</td>
<td>Car</td>
</tr>
<tr>
<td>Expense per month</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>600 EUR</td>
<td>-</td>
<td>100 EUR</td>
<td>-</td>
</tr>
<tr>
<td>Expense per day</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>40-50 EUR</td>
<td>-</td>
<td>5-10</td>
<td>-</td>
</tr>
<tr>
<td>Problems faced or fear to encounter/ if visit Pakistan</td>
<td>security</td>
<td>Warm/electricity</td>
<td>Wear a veil/security</td>
<td>stability</td>
<td>stability</td>
<td>no</td>
<td>bombs</td>
</tr>
<tr>
<td>Pakistan image</td>
<td>Ok but afraid</td>
<td>nice</td>
<td>confused</td>
<td>Excellent/hospitable people</td>
<td>Nice but media has scared us</td>
<td>Nice but current problems fear</td>
<td>Good</td>
</tr>
<tr>
<td>Overall evaluation</td>
<td>+</td>
<td>+</td>
<td>+/-</td>
<td>+/-</td>
<td>+/-</td>
<td>+/-</td>
<td>+/-</td>
</tr>
<tr>
<td>Area of interest tourism/ if you visit</td>
<td>Asian culture</td>
<td>Beauty/nature</td>
<td>Heritage and culture</td>
<td>Trekking/mountain climbing</td>
<td>handicrafts</td>
<td>nature</td>
<td>Love Pakistani dresses/ and made carpets</td>
</tr>
<tr>
<td>Expectations reached/ if you visit</td>
<td>Yes/may be</td>
<td>Don’t know yet</td>
<td>Can’t say</td>
<td>fully/want to visit again</td>
<td>Don’t know yet</td>
<td>yes</td>
<td>Love to visit Pakistan in coming year</td>
</tr>
<tr>
<td>Improvement advice</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Social stability</td>
<td>stability</td>
</tr>
</tbody>
</table>
The yellow table indicate the number of potential tourists I met in sweden.they belonged to different nationalities.few are the students from linkoping univerity where my son was doing masters, rest are the people I was able to interview in ikea ( swedish company for house items). According to first two swedish students,they want to viist pakistan in future but have a fear of lack of facilities and afraid of current security issues in pakistan.

![Figure 7: Visit to sweden in 2007.](image)

Table 3: Potential Tourists in Belgium.

<table>
<thead>
<tr>
<th>Number of people interviewed in Belgium</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>19</td>
<td>22</td>
<td>38</td>
<td>44</td>
<td>30</td>
<td>35</td>
</tr>
<tr>
<td>Gender</td>
<td>F</td>
<td>M</td>
<td>F</td>
<td>M</td>
<td>F</td>
<td>M</td>
</tr>
<tr>
<td>Nationality</td>
<td>France</td>
<td>Belgium</td>
<td>Belgium</td>
<td>Belgium</td>
<td>German</td>
<td>German</td>
</tr>
<tr>
<td>Number of visits to Pakistan</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Desire to visit Pakistan in future</td>
<td>no</td>
<td>Yes</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Idea to travel Pakistan</td>
<td>internet</td>
<td>TV</td>
<td>TV</td>
<td>TV</td>
<td>Pakistani friend</td>
<td>Pakistani friend</td>
</tr>
<tr>
<td>Booking of your transport/if you visit</td>
<td>agent</td>
<td>internet</td>
<td>agent</td>
<td>agent</td>
<td>Internet/agent</td>
<td>internet</td>
</tr>
<tr>
<td>Internet booking willingness</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>no</td>
<td>Yes/may be</td>
<td>Yes</td>
</tr>
<tr>
<td>Purpose of visit/if you visit</td>
<td>culture</td>
<td>culture</td>
<td>nature</td>
<td>food</td>
<td>Nature/people/culture</td>
<td>Historical buildings/food/festivals</td>
</tr>
<tr>
<td>Length of stay/if you stay</td>
<td>1 week app</td>
<td>10 days app</td>
<td>2 weeks app</td>
<td>1 week app</td>
<td>2 weeks app</td>
<td>2 weeks app</td>
</tr>
<tr>
<td>Type of</td>
<td>hotel</td>
<td>hotel</td>
<td>hotel</td>
<td>hotel</td>
<td>Hotel</td>
<td>Hotel/ca</td>
</tr>
</tbody>
</table>
I had the opportunity to visit Belgium in 2008 as my son started his doctoral studies there. I was able to interview his colleagues and some local people belonging to different nationalities. According to these people, the current condition in Pakistan is not so good to be visited, but if the condition improves, then they can think of visiting Pakistan.

Table 4: Potential Tourists in U.K.

<table>
<thead>
<tr>
<th>Number of people interviewed in United Kingdom</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Age</strong></td>
<td>27</td>
<td>31</td>
<td>49</td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td>M</td>
<td>F</td>
<td>M</td>
</tr>
<tr>
<td><strong>Nationality</strong></td>
<td>British but born in Pakistan</td>
<td>UK</td>
<td>UK</td>
</tr>
<tr>
<td><strong>Number of visits to Pakistan</strong></td>
<td>4</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td><strong>Desire to visit Pakistan in future</strong></td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td><strong>Idea to travel Pakistan</strong></td>
<td>family</td>
<td>TV</td>
<td>Neighbour friend</td>
</tr>
<tr>
<td><strong>Booking of your transport/ if you visit</strong></td>
<td>internet</td>
<td>agent</td>
<td>Travel Agency</td>
</tr>
<tr>
<td><strong>Internet booking willingness</strong></td>
<td>yes</td>
<td>not reliable</td>
<td>no</td>
</tr>
<tr>
<td><strong>Purpose of visit/ if you visit</strong></td>
<td>Fun/mountaineering</td>
<td>Nature/culture/heritage</td>
<td>Culture/heritage/food</td>
</tr>
<tr>
<td><strong>Length of stay/ if you stay</strong></td>
<td>1-2 months app</td>
<td>3 weeks app</td>
<td>1 month app</td>
</tr>
<tr>
<td><strong>Type of accommodation/ if you visit</strong></td>
<td>Camping/family</td>
<td>hotel</td>
<td>Hotel</td>
</tr>
<tr>
<td><strong>Means of transport/ if you travel</strong></td>
<td>Cycle/bus</td>
<td>Rental car</td>
<td>Tax/train</td>
</tr>
<tr>
<td><strong>Expense per month</strong></td>
<td>-</td>
<td>350 EUR app.</td>
<td>450-500 EUR app</td>
</tr>
<tr>
<td><strong>Expense per day</strong></td>
<td>-</td>
<td>10-12 EUR app</td>
<td>15 EUR app</td>
</tr>
<tr>
<td><strong>Problems faced or fear to encounter/ if visit Pakistan</strong></td>
<td>terrorism</td>
<td>Banking facilities/beggars</td>
<td>Transport/warm/pollution</td>
</tr>
</tbody>
</table>
Pakistan image

<table>
<thead>
<tr>
<th>Overall evaluation</th>
<th>+/-</th>
<th>+/-</th>
<th>+</th>
</tr>
</thead>
</table>

Area of interest tourism/ if you visit

<table>
<thead>
<tr>
<th>Trekking and jungle tour</th>
<th>Culture/historical attractions</th>
<th>Festivals/handicrafts</th>
</tr>
</thead>
</table>

Expectations reached/ if you visit

<table>
<thead>
<tr>
<th>90% but now it’s getting hard due to insurgency</th>
<th>Hope so</th>
<th>Fully</th>
</tr>
</thead>
</table>

Improvement advice

<table>
<thead>
<tr>
<th>Advancement in education/science/technology</th>
<th>More ATM machines</th>
<th>Government serious attitude towards tourism industry</th>
</tr>
</thead>
</table>

Some of my relatives and friends living in UK helped me out in filling this questionnaire. I emailed them, so that they help me in getting it filled with potential tourists in UK.

So, the overall evaluation of this questionnaire is that the tourists’ abroad want to visit Pakistan if the current internal war situation of Pakistan gets better and better facilities are provided in all parts of the country.

4.3 The Effects of Tourism on the Economy

Table 5: Foreign Tourist Arrival Rate in Pakistan [4].

<table>
<thead>
<tr>
<th>YEARS (hundred thousands)</th>
<th>NUMBERS (hundred thousands)</th>
<th>%AGE</th>
<th>RECEIPTS US $ (million)</th>
<th>%AGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td>378.4</td>
<td>+</td>
<td>114.1</td>
<td>+</td>
</tr>
<tr>
<td>1996</td>
<td>368.7</td>
<td>-</td>
<td>145.9</td>
<td>+</td>
</tr>
<tr>
<td>1997</td>
<td>374.8</td>
<td>+</td>
<td>116.9</td>
<td>-</td>
</tr>
<tr>
<td>1998</td>
<td>428.8</td>
<td>+</td>
<td>97.9</td>
<td>-</td>
</tr>
<tr>
<td>1999</td>
<td>432.2</td>
<td>+</td>
<td>76.4</td>
<td>-</td>
</tr>
<tr>
<td>2000</td>
<td>556.7</td>
<td>+</td>
<td>84.4</td>
<td>+</td>
</tr>
<tr>
<td>2001</td>
<td>499.7</td>
<td>-</td>
<td>92.2</td>
<td>+</td>
</tr>
<tr>
<td>2002</td>
<td>498.1</td>
<td>-</td>
<td>105.4</td>
<td>+</td>
</tr>
<tr>
<td>2003</td>
<td>500.9</td>
<td>+</td>
<td>135.6</td>
<td>+</td>
</tr>
<tr>
<td>2004</td>
<td>648.0</td>
<td>+</td>
<td>185.6</td>
<td>+</td>
</tr>
<tr>
<td>2005</td>
<td>798.3</td>
<td>+</td>
<td>185.3</td>
<td>-</td>
</tr>
<tr>
<td>2006</td>
<td>898.4</td>
<td>+</td>
<td>260.1</td>
<td>+</td>
</tr>
<tr>
<td>2007</td>
<td>839.5</td>
<td>-</td>
<td>276.1</td>
<td>+</td>
</tr>
<tr>
<td>2008</td>
<td>389.4</td>
<td>-</td>
<td>131.5</td>
<td>-</td>
</tr>
</tbody>
</table>

In order to verify the results of my questionnaire that if really tourists arrival rate is declining, I visited the Ministry of tourism and PTDC. The data provided by them was highly mismanaged, so I had to organize and compare last 14 years in order to get my desired result. The information collected from the Ministry of Tourism, PTDC and by the Tourism competitive report 2009, it is
clear that Pakistan had great potential in tourism industry. From the table we can see that the tourism industry of Pakistan has a trend of ups and downs in alternate years. It has never grown in a pace. In the era of 1990s the number of tourists arrival was less as compared to era 2000 because of less advancement in terms of technology and infrastructure. With the development of this sector the number of tourists arrival increased in the era of 2000 but at the end of this era the number of tourist arrival declined tremendously. The reason being security issues. If we look at the Table-1 the tourist arrival rate in 1995 was 378.4 which kept on increasing till 2006 to around 898.4. Although 2007 was declared as the Year of Tourism by the previous Government but it was the most crucial year for the tourism industry with a decrease in the arrival rate by 8%. This also decreased the national income rate from 276.1 to 131.5.

I have collected some data from the The Travel & Tourism Competitiveness Report 2009. From this data I have compared the performance of Pakistan with its neighbouring countries like India and China in order to evaluate the performance of Pakistan tourism industry and its impact on economy. I have tried to compare Pakistan with its neighbouring countries because it was never done before and secondly this is the only way for Pakistan tourism industry to see where it lacks and what areas/departments it should work on in order to gain the competitive advantage over other countries. According to the data Pakistan’s global ranking in 2008 was 111 out of 133 countries which is currently 113 in the year 2009. The decrease in tourism industry also affected the employment ratio. Pakistan had 2809 job opportunities while India and China had 30491 and 74498 jobs respectively. If we look at other aspects like regulatory frameworks, transport facilities, health care, safety and security Pakistan is far behind from its neighbours.

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>GLOBAL RANKING TOTAL 133</th>
<th>REGIONAL RANKING/ASIA TOTAL 25</th>
<th>EMPLOYMENT THOUSANDS</th>
<th>SCORE TOTAL 7</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2008</td>
<td>2009</td>
<td></td>
<td></td>
</tr>
<tr>
<td>China</td>
<td>47</td>
<td>62</td>
<td>10</td>
<td>74,498</td>
</tr>
<tr>
<td>India</td>
<td>62</td>
<td>65</td>
<td>11</td>
<td>30,491</td>
</tr>
<tr>
<td>Pakistan</td>
<td>111</td>
<td>113</td>
<td>23</td>
<td>2,809</td>
</tr>
</tbody>
</table>

Table 6: Travel and Tourism Ranking [5].

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>CHINA</th>
<th>INDIA</th>
<th>PAKISTAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>T&amp;T regulatory framework</td>
<td>Rank 133</td>
<td>Score 7</td>
<td>Rank 133</td>
</tr>
<tr>
<td>Policy rules &amp; regulations</td>
<td>88</td>
<td>4.24</td>
<td>107</td>
</tr>
<tr>
<td>Environmental sustainability</td>
<td>105</td>
<td>4.03</td>
<td>74</td>
</tr>
</tbody>
</table>
Similarly in Table 3, we can see that Pakistan is behind in T&T, environmental sustainability, safety & security and prioritization of T&T from China and India. But Pakistan is showing good performance than China and India in the areas of policy rules & regulations, health and hygiene.

In Table 4, we see that Pakistan in comparison to its neighbouring countries lies behind in the areas of business environment and infrastructure, air transport, ground transport, tourism infrastructure. But it shows some good ranking in areas of price and competitiveness in T&T industry and ICT infrastructure from India.

In Table 5, we can see that Pakistan is far far behind in the areas of human, cultural and natural resources and in the area of HR from India and China.

The Figure 6 below is taken from the World Tourism Organisation report (2005). According to this report the tourist arrival, revenue earned, number of hotels and rooms in Pakistan will keep on
increasing till 2010, but actually this is not happening so. These physical targets can only be achieved when the current position of Pakistan will improve.

![Physical Targets for 2006-10](image)

**Figure 8: Physical Targets [6].**

### 5 RECOMMENDATIONS

In this section I have described some of the potential solutions in order to overcome the problems faced by the Pakistani tourism sector.

#### 5.1 Strategies for Tourism Development in Pakistan

The aim of the proposed strategies is to maximize the tourism contribution towards the positive image of the country, environment and economic well-being of Pakistan. Pakistan is both dynamic but at the same time complicated in the marketing, management and its tourism development. So in order to create employment opportunities, generate confidence for inward investment and to stimulate leisure opportunities for domestic and foreign tourists, following strategies should be considered by the government and the concerned departments of tourism industry.

Keeping in view the questionnaire results and T&T Competitiveness Report 2009 [5], I feel that the concerned departments should develop comprehensive and realistic tourism policies and strategies. These strategies/action of plans must be balanced by the tourism authorities in order to reach positive results in the coming years and cover the loss of previous years (2007 and 2008). The strategies can be divided into two main groups with subdivisions:
1) Promoting Sustainable Growth
2) Tourism Infrastructure And Business Environment

5.1.1 Promoting Sustainable Growth

Pakistan tourism industry falling condition and image can be sustained back by ensuring and promoting the sustainable growth of this industry. For sustainable growth, the tourism authorities must carry out the following actions of plans:

- **Preference to tourism industry:** Government of Pakistan must prioritize the tourism industry by allocating sufficient amount of annual budget to this sector, funding new projects, attracting private investments and participating more in tourism fairs worldwide.

- **Environmental sustainability:** Pakistan is a country with beautiful nature and historical background. The government and related authorities must maintain its natural beauty and old historical places by allocating more funds and work with UNESCO and other foreign bodies to maintain the heritage sites of the world. The government should introduce ECO friendly vehicles to sustain the environment.

- **Safety and security issues:** The biggest challenge Pakistan tourism industry facing today is the safety and security for the people of Pakistan as well as the tourists visiting Pakistan. Government of Pakistan must take strict measures in order to maintain law and order situation as they were in the previous years. Pakistan was one of the safest countries till 2005, so the government should revise the same safety and security measures in order to gain back the positive image.

- **Health and hygiene issues:** Most of Pakistan population lack access to safe drinking water. Government should pay attention and improve the drinking, sanitation, garbage system and hospital conditions so that the tourists don’t get ill.

- **Host community involvement:** Major achievement in tourism industry can be achieved by the help residents of the country. Local residents can play their role through hospitality, their
own small businesses, giving rooms of their homes in areas where hotels are not present, guiding tourists where tourist’s guides are not available, arranging local festivals by not increasing the price to items unnecessarily.

- **Accessibility to facilities:** The government should increase their role in the area of providing facilities to tourists as the private sector is doing right now i.e. Banking facilities like ATM and visa card acceptance is the demand of time, opening more world class hotel and restaurant chains and internet services should be improved in rural and mountain areas which are mostly visited by the tourists.

- **Increasing competitiveness:** Tourism industry in Pakistan must focus on skilled workforce, innovative marketing plans and management system in order to attract tourists and gain competitive value against its neighbor countries.

- **Human resources:** Government should implement special tourism training programs within schools and universities throughout the country to produce skill tourists’ guide as up till now there are no such training programs within the country.

- **Natural resources:** Pakistan has inherited six of the world heritage sites but unfortunately the world outside is still not aware of one of the oldest civilization in pakistan, so the authorities must maintain and promote these heritage sites to the tourists.

- **Cultural resources:** According to the data collected from tourists inside and outside, they love the culture of Pakistan which includes the food, festivals, dances, games, music etc. The tourism authorities must promote the local culture of Pakistan by arranging festivals and fairs to other countries through Pakistani embassies abroad. Media should also promote the culture of Pakistan through good documentaries on international channels.

- **Quality assurance:** Tourists demand quality products when they spend so much money to visit a place. In order to assure quality to the tourists, the government should improve the
conditions of hotel, guest rooms and food chains. Government should focus on the clean environment, electricity shortage and inflation in the country.

- **Interviews and Questionnaires:** Government of Pakistan should start a new strategy of taking opinions from domestic and international tourists via interviews and questionnaires by pacing its related employees in places like airports, hotels, shopping areas etc.

### 5.1.2 Tourism Infrastructure and Business Environment

- **Sound policy rules and regulations:** The government should implement policies that are friendly for foreign investment and ownership in Pakistan. The visa requirement policies cost and time of starting a business should be easy for investors because Pakistan demands for such investments in order improve its economic condition.

- **Transport infrastructure development:** The government should improve the production and quality of ground and air transport. Road condition is still in the developing phase especially the local roads and roads in the northern areas which constantly destroy due to land sliding. So after 60 years of independence the government should now seriously allocate budget for roads in order to avoid accidents. The government should also introduce tram system in Pakistan that can reduce time and cost for people.

- **ICT infrastructure:** The idea of internet bookings is becoming popular in Pakistan but still the government needs to stimulate awareness among people. Pakistan is one of the world’s cheapest countries in terms of cost for telephone/mobile usage.

- **Price competitiveness:** The inflation rate is high in Pakistan increasing the cost of petrol and food items. The air travel is also expensive as compared to Pakistan neighboring countries. For domestic tourists the inflation rate is resulting in decrease of travelling but for the international tourists it is still economical to travel to Pakistan.

- **Marketing strategies:** Marketing is the main source of tourism growth. Pakistan media is liberal and its coverage is in all parts of Pakistan but unfortunately media of Pakistan like
international media has failed to portray positive image of Pakistan. If government or
tourism authorities pay attention in this area then media can become a major source for
portraying positive image and Pakistan hidden beauty and heritage to outside world.
National geographic is the most famous and watched television channel, which can become
a marketing source for Pakistani tourism industry.

- **Immigrants and embassies outside the country:** A large number of Pakistani Diaspora
exists in countries like UK, USA, Australia, Canada, Middle East and most of the
Scandinavian countries. The influence of Pakistan and its culture can also be seen in these
countries and it is also a reason of tourists coming to Pakistan. Government of Pakistan
should promote Pakistan and its culture to the outside world via its people and embassies.

- **Pakistani students studying abroad:** The Pakistani students getting education from
abroad can play a key role in portraying the positive image of Pakistan and its culture by
giving lectures in educational institutes, arranging functions in embassies and universities etc.
The images below are some of the examples of strategies used by students to promote
Pakistan and its culture.

![Figure 9: Pakistani students at Linkoping University, Sweden.](image)

- **Performance evaluation:** Evaluation program should be implemented in the tourism
industry to keep in check and view the situation of this industry in order to avoid corruption
and laziness in this sector.
• **Innovation:** Innovation can act as a fresh breeze for Pakistan. Innovation is needed in the areas of mountaineering and cultural heritage.

5.2 Tourism as source of employment in Pakistan

Besides its mind captivating scenic views Pakistan has a great tourism potential to attract tourists from all around the world through industries like handmade Carpets, Textiles, Embroidery clothes, Jewellery, Ceramics, Wood work, Metal work, Sports Goods, Surgical Instruments etc. This will contribute towards the economy of the country by flourishing Cottage and small-scale industries
that can create employment for the people. Short term seasonal employment will be reduced and profits earned from tourism can be utilized in high developmental project. It can most importantly contribute to social and economic uplift of rural areas of Pakistan where most poor people live and will also benefit the wide range of stakeholders like tour operators, travel agents, hoteliers, transporters, tour guides, drivers, food suppliers, and equipment manufacturers, taxi drivers and porters, thus bringing employment and economic benefit for everybody. Tourism potential and as a source of employment also lies in building up unity and harmony among whole Pakistani nation. For that the Government should also encourage the private sector to develop a tourism-friendly environment in the country to increase Pakistan’s financial stability.

5.3 Role of government towards the development of the tourism sector

Pakistan participation in World tourism conferences, discussions and meetings in different countries can prove to be a positive link and promotion of tourism industry. The data below was obtained from the internet and newspaper. Following is the role that the government is playing in order to improve the condition of this sector:

- During 2004 Pakistan participated in a number of conventional and un-conventional sports i.e. Cricket, Hockey, Squash and World Cup Polo events held in different countries.

- During the year 2004, a number of franchised restaurants and retail outlets were opened in the Country which also created awareness about Pakistan

- The United Nations and members of the international coalition, lauded the important role played by Pakistan in fighting global terrorism, which created positive image of Pakistan as a dynamic, progressive, moderate, and democratic Islamic country in the world community.

- During 2004, Pakistan remained in Tourism and Non-Tourism related social and political news in the World Media, creating awareness about Pakistan as a major country in the region. During 2004 several Satellite TV channels e.g. National Geographic televised exclusive programmes on Pakistan, e.g., documentary on Shundor Pass Polo Tournament
was put on air more than once by National Geographic Channel creating tourist interest in Pakistan.

- During 2003-04 President of Pakistan visited the Russian Federation, Malaysia, Saudi Arabia, UK, USA, Germany, France, Tunisia, Algeria, Morocco, Canada, China, Korea, and Turkey for different high level events. The Prime Minister of Pakistan also visited Five GCC countries, China, Saudi Arabia, USA, Iran, France, Switzerland, Afghanistan, Cambodia, and Thailand to attend different events. These events were televised by the electronic media throughout the world, improving the global image of Pakistan.

- During 2004 Pakistan hosted the 12th SAARC Summit and several other important international conferences, which were given high coverage in international media. Likewise during 2004, a number of Heads of States and Governments, and high level delegations from USA, UK, Russia, China, Japan, France, UAE, Italy, Romania, Iran, Ireland, Turkey, Vietnam, Bangladesh, Tajikistan, Mauritius, Cuba, Afghanistan, Bosnia, Kyrgyzstan, Brunei, Cambodia, & Philippine etc. visited Pakistan generating immense interest for the Country, abroad.

6 CONCLUSION AND FUTURE WORK

Travelling has become an excellent remedy for the stress and anxiety demanded by our modern day life schedules. People prefer change when they get holidays so that they can relax their minds and spend some quality memorable time. Therefore, Tourism has become a popular global leisure activity and is the most dynamic and current growing industry of the world. Tourism activity and tourists are important because it is the most effective mean of exploring other countries, its people and their culture whereas the tourists help in building the bridges between nations through love, mutual understanding and knowledge, thus bringing different cultures together.

Pakistan with its natural and historical beauty holds a great potential for tourism. The factors that have brought this industry down are the weak infrastructure and instability in the country. All these factors can be turned positive if government takes serious actions for this industry and for the country and also follow the techniques and methodologies being used by most successful destination countries in tourism. The methodology used for this research helped me in getting the views of the
domestic and international tourists but still it lacks in the sense that it was not applied for majority of
the population because of shortage of time and resources. One of the drawbacks of the research
methodology I used is that the interviews from individuals are strongly influenced by their moods
and level of comfort. But still today researchers make use of the interviews being the major source
of information gathering on a larger scale. The shy behavior of women is also a difficult situation
that most researches can face during their research in Pakistan; therefore most of the research done
is on men. Comparison of Pakistan tourism industry with some of its neighboring countries and my
proposed strategies help the government to identify the weak points in our tourism industry and
develop strategies to improve this sector.

Based on my thesis, future researchers can work in the related field by focusing on one type of
tourism in Pakistan and the problem faced by that type of tourism. My thesis covered all types of
tourism in general providing sufficient room for depth research for example wildlife, sports or eco
tourism.
7 REFERENCES


8 APPENDICES

8.1 Tourism Questionnaire

Hello people. I would be very glad if you could take 5 min of your precious time to answer these questions and send it back to ahfakhar@gmail.com. I need these answers to support my thesis work. I would appreciate your opinion about your tourism destination choice and your view about Pakistan tourism industry. This questionnaire is to be filled by persons who have already or who want to visit Pakistan.

Nationality

Age

Gender
☐ male
☐ female

To which country outside of Europe have you been on holiday?

Have you ever visited Pakistan? Do you intend to visit Pakistan in future?

How did you get the idea to go to Pakistan? (More than 1 answers possible)
☐ Travel agency
☐ Internet
☐ Family/Friends
☐ Newspapers/magazines
☐ Travel brochures
☐ Travel guides (e.g. Lonely Planet)
☐ TV
☐ Radio
☐ Tourism Board
☐ Fairs (e.g. WTM / ITB)
☐ Other:

Where did you book your transport? Was it an easy procedure for you?
☐ In person at a travel organization in country of residence
☐ By Telephone (through call centre)
☐ Through the internet at a travel organization in country of residence
☐ Through the internet at a travel organization in destination country
☐ Through the internet (other)
Would you be willing to book a trip to Pakistan on the internet?

- Yes, I did so before
- Yes, I'm willing to do so, but I have never done this so far
- Yes, but only transportation
- Yes, but only lodging
- I use internet as an information source and make my bookings at the destination
- No, I prefer to book at a travel agency in my own country
- Other: 

How often have you visited Pakistan before?

- Not yet
- 1 time
- 2 times
- 3 times
- 4 times
- 5 times or more

What was the main purpose of your holiday to (the country of your choice)?

- Round trip
- Beach holiday
- Diving holiday
- Golf holiday
- Honeymoon
- Cultural holiday
- Festivals
- Nightlife
- Spiritual holiday
- Eco-tourism holiday
- Active holiday
- Wintering
- Nature holiday
- Winter sports
- Family visit
- Spa / wellness
- Business/Study / internship / volunteer work
- Other: 

How long did your holiday in Pakistan last?
- 7 days or less
- 8 - 14 days
- 15 - 21 days
- 22 - 30 days
- 1 to 2 months
- 2 months or more

At what kind of accommodation did you stay in Pakistan? (More than 1 answers is possible)
- Average class hotel (up to and including 3 stars) ***
- Luxury hotel (4 and 5 stars) ****(*)
- Guesthouse
- Apartment/bungalow
- Private home / villa
- Friends / relatives / family
- Camper / caravan / tent
- Other: ____________________________

What means of transport did you use mostly in (the country of your choice)?
- Car (hire)
- Taxi
- Motorcycle (hire)
- Airplane/helicopter
- Bus (public transport)
- Bus (excursion)
- Train
- Boat
- Boat (excursion)
- Typical local transport (e.g. rickshaw/horse ride)
- Camper
- Bike
- Other: ____________________________

What were the travel and lodging expenses of this trip to (the country of your choice) per person?
- about €500
- about €750
- about €1,000
- about €1,250
- about €1,500
- about €1,750
- about €2,000
- about €2,250 or more

How much did you spend per person per day in (the country of your choice) exclusive lodging expenses?
- about €10
- about €20
- about €30
- about €40
- about €50
- about €60 or more
Did you encounter or fear any of the following problems? (More than 1 answers is possible)

- Inflation
- Electricity
- Pollution
- Terrorism
- Transport
- Tour guide
- Accommodation
- Language problem

What is your image of Pakistan as a tourist spot?

- Beautiful with all facilities available
- Beautiful with some facilities lacking
- Personal view/experience
- Unstability

What is your overall valuation of your stay?

++ + +/- - -- N/A

Rating

Could you give a valuation of the several aspects of the tourism product in the country? If the question is not applicable, you can leave the item open.

++ + +/- - -- N/-

Nature (general)

Jungle

Beach

Culture (general)

Museums

Historical attractions

Golf

Mountain biking

Climbing

Treking and jungle tours

Diving
<table>
<thead>
<tr>
<th>Activity</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sailing</td>
<td></td>
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<tr>
<td>Surfing</td>
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<tr>
<td>Fishing</td>
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<tr>
<td>Accommodation</td>
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<tr>
<td>Food &amp; Beverages / Facilities</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nightlife</td>
<td></td>
<td></td>
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<td>Hospitality / kind people</td>
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<tr>
<td>Tourism information supply</td>
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<tr>
<td>Feeling of safety</td>
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<tr>
<td>Quality of the medical care</td>
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<tr>
<td>Customs and immigration</td>
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<tr>
<td>Possibility to collect money (e.g. ATM)</td>
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<td></td>
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<tr>
<td>Price/quality in general</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

**Has your trip to (Pakistan) conform your expectations?**
- [ ] Completely
- [ ] For most part(s)
- [ ] Partially
- [ ] Barely
- [ ] Absolutely not

**To what age-category do you belong?**
- [ ] Until 18 years
- [ ] 18 - 24 years
- [ ] 25 - 29 years
- [ ] 30 - 34 years
- [ ] 35 - 39 years
- [ ] 40 - 44 years
- [ ] 45 - 49 years
- [ ] 50 - 54 years
- [ ] 55 - 59 years
- [ ] 60 - 64 years
- [ ] 65 years and older
What would you like to improve to tourist facilities and activities?

- Better quality café and restaurants
- Improve tourist industry
- Develop open-air environment: cafes etc
- Theatre and cultural Arts Centre
- Wide range of music concerts
- More arts and cultural events
- League of Friends/tourists guides
- Facilities in northern areas like ATM/banks
- Personal view _____________________________