

FOREST BASED TOURISM SERVICES IN PAKISTAN

BACKGROUND

Tourism, including nature-based is one of the driving forces for economic development. Nature-based tourism refers to tourism leaning on the destination area's natural environment as its key attraction, or tourism primarily concerned with the direct enjoyment of some relatively undisturbed phenomenon of nature. The demand for nature-based tourism has steadily grown and is the most rapidly an expanding sector within tourism across the world. Same holds true for South Asian region. As it is a prominent region with distinctive landmass, mountains, forests, rural tourist spots, rivers, beaches, and different climatic zones.

Nevertheless, forests are the main source of tourism in Pakistan even though the country is a forest poor country with less than 6 percent of total area under forest. Most of the tourism in Pakistan prevails in the northern areas of country which are rich in natural forests. This study provides insights into the Pakistan's forest-based tourism, traveling and convenience dynamics of tourist point selection and approximate welfare from tourism sector together with costs incurred. Certain recommendations have been suggested as well for exploiting the full potential of Pakistan's forest based tourism. Survey data from the study entitled "Assessment of Demand and Supply of Forest Products and Services, to Quantify Contribution of Forests to Rural Livelihood and National Economy" have been used for data analysis. The study was jointly conducted by Ministry of Climate change, REDD+ Pakistan and Pakistan Institute of Development Economics (PIDE), Islamabad.

INCEPTION

Tourism is one of the many untapped potentials of Pakistan and forest-based ecosystems are at the helm of tourism. This sector particularly, remains a highly ignored while quantifying its economic contribution. Most of the tourism in Pakistan, especially to the northern areas of country, is solely linked with the forest endowment of the region while there is great promise for it in central and southern regions as well.

TOURISM SNAPSHOT

The analysis is based on the data from top 20 tourists' sites where both the profiling and interviews with tourists were carried out.

More than
7 MILLION TOURISTS
visit the **TOP 20 TOURIST HOTSPOTS**
across Pakistan annually.

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The highest visited places are in Punjab (Murree, Kallar Kahaar) and Khyber Pakhtunkhwa (Swat, Galiyaat). This is then followed by Gilgit Baltistan and AJK. In Balochistan, most of the tourists just spend daytime primarily in Quetta and Kund Malir, as most of the tourist are local. Sindh has the least number of tourists. Table 01 below shows the disaggregated data of number of tourists in each province/region, average days spend at a place and the average distance of tourists travelled to tourist destinations.

Table 01: Tourist Profiling

Province	Number of Tourists (in 000)	% Share	Average days spend (in number)	Distance traveled (one way in KM)
AJK	670	9.37	1.9	300
Balochistan	209	2.92	0.8	280
GB	728	10.18	6.3	1100
KP	2,282	31.91	2.0	450
Punjab & ICT	3,232	45.19	1.2	66
Sindh	30	0.42	1.7	90
Total	7,151	100	2.0	200

TOURISTIC AND CONVENIENCE ATTRIBUTES FOR TOURIST POINT SELECTION

Various tourist attributes inspire the tourists to visit selected sites, called as “pull factors of nature-based tourism”. As shown in Table O2, the main attributes of forest-based tourism are mountain landscape, lakes, hiking and Cultural heritage/archeological.

Table O2: Touristic Attributes for Selecting the Tourist Point (% distribution)

Attributes	AJK	Balochistan	GB	KP	Punjab	Sindh	Overall
Forest landscape	1.0	1.9	0.0	13.7	9.1	0.0	4.3
Mountain landscape	31.6	2.5	14.7	26.1	17.1	30.8	20.5
Hiking	3.1	48.1	10.9	8.0	0.5	16.4	14.5
Trekking	3.1	0.6	6.6	5.7	0.0	9.1	4.2
Lakes	53.1	1.3	21.3	11.7	21.6	0.0	18.2
Wildlife	0.0	4.4	13.2	13.4	0.0	0.0	5.2
National parks	0.0	26.0	10.0	2.7	2.5	20.5	8.0
Cultural heritage/archeological	8.2	12.0	9.6	12.3	31.4	9.4	16.1
Sports festival	0.0	0.0	12.0	6.4	16.1	6.1	6.8
Others	0.0	3.2	1.6	0.0	1.7	7.7	2.4
Total	100	100	100	100	100	100	100

The convenience attributes also matter as it covers various aspects including affordability, risk behavior, type of tourism (alone or family) along with available facilities. Likewise, Table O3 shows that the convenience factors vary across regions. For example, the selection of AJK sites highly depends on proximity to home, weather condition and financial affordability. Security matters a lot in Gilgit Baltistan and Balochistan. Likewise, road infrastructure matters for Punjab and AJK. In KP, its usually the weather conditions.

Table O3: Convenience Attributes for Selecting the Tourist Point (% distribution)

Attributes	AJK	Balochistan	GB	KP	Punjab	Sindh	Overall
Good road infrastructure	11.2	0.0	3.3	2.0	12.1	0.0	5.7
Near to home	24.5	5.7	4.9	2.7	32.8	5.1	15.2
Less land sliding	0.0	0.6	1.6	0.0	1.0	0.0	0.6
Good hotel facility	3.1	0.0	9.8	2.7	0.5	0.0	2.0
Weather condition	27.6	16.5	14.8	56.4	14.1	15.4	25.6
Financial affordability	16.3	73.4	4.9	24.2	27.8	71.8	36.1
Availability of public transport	6.1	2.5	3.3	1.3	1.5	2.6	2.6
Better security	8.2	0.6	36.1	8.1	3.0	0.0	7.0
Availability of emergency services	0.0	0.0	1.6	0.7	0.5	0.0	0.4
Others	3.1	0.6	19.7	2.0	6.1	5.1	4.7
Total	100	100	100	100	100	100	100

TRANSACTION COST FOR A TOURIST

Since tourism to GB, AJK and KP has more distances, therefore per person cost is also high in these regions. Figure 01 below shows the per person cost and total value of tourism on selected 20 sites. It has lot of spillover effects including a complete value chain of hotel industry, various shopping activities, employment in various sectors of the area. The communities residing in most of these tourist points has tourism as the main source of income. Mostly the seasonal tourism in various areas, i.e., Neelum, Swat, GB provides the main livelihood and contributes to the local economy. However, tourism in Pakistan requires a policy focus where it must be environment friendly by protecting the environment and culture.

Figure 01: Average Tourism Cost Per Person Per Trip across Pakistan (PKR)

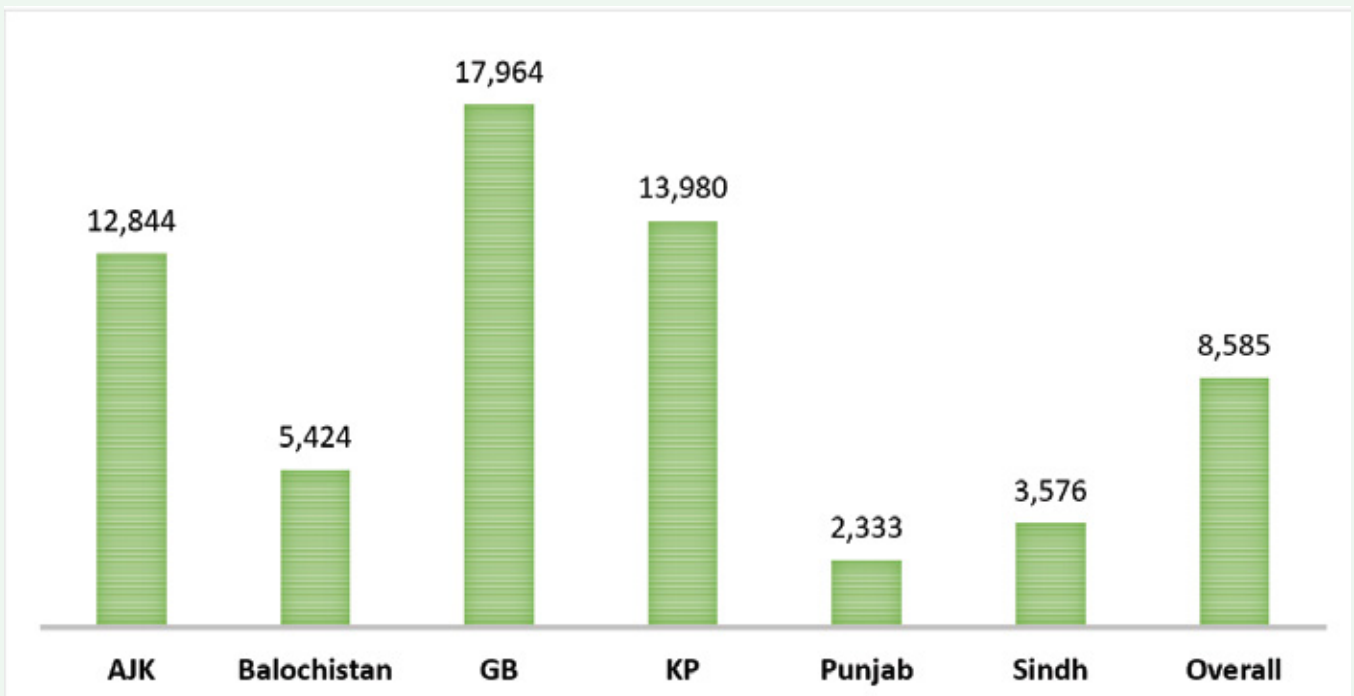


Table 04 shows the cost incurred by the tourists in various tourism sub-sectors. The key components of the cost are transport and accommodation across all provinces i.e. 53 and 40 percent respectively. Although, transport cost incurred in GB and Punjab is the highest while accommodation cost incurred at GB is the lowest. Interestingly, shopping cost estimated at GB is the highest of all provinces.

Table 04: Cost Share by Various Components (% distribution)

Province	Transport	Hotel	Recreation	Shopping	Medicine	Total
AJK	48.0	49.5	1.0	1.4	0.0	100
Balochistan	46.8	53.0	0.0	0.2	0.0	100
GB	66.4	18.1	0.9	11.9	2.8	100
KP	47.1	45.6	0.2	6.7	0.4	100
Punjab	62.9	23.1	9.5	4.3	0.3	100
Sindh	52.0	43.8	1.1	3.1	0.0	100
Overall	53.2	39.6	3.1	3.9	0.3	100

TOP 20 TOURIST HOTSPOTS



GILGIT BALTISTAN -
Skardu, Ghizer, Hunza, Gilgit



KHYBER PAKHTUNKHWA -
Naran, Swat, Kumrat, Galyaat, Chitral



BALOCHISTAN -
Ziarat, Quetta, Kund Malir



AZAD JAMMU KASHMIR -
Neelum, Rawlakot, Mirpur

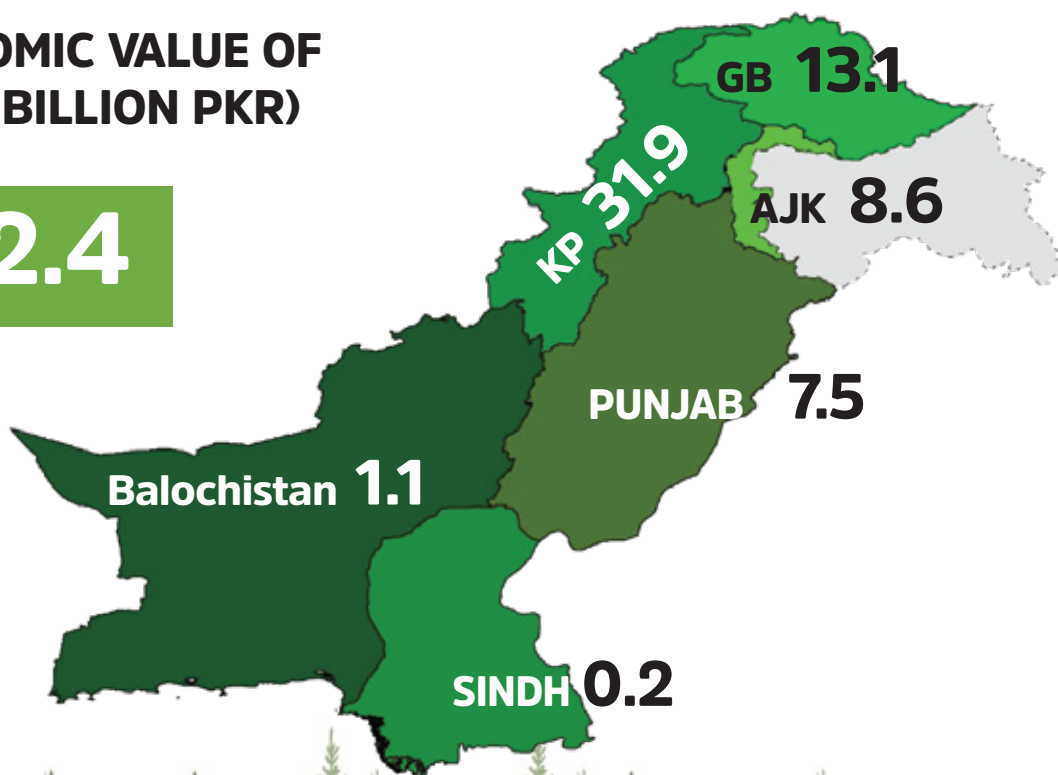


PUNJAB -
Murree, Kallar Kahaar, Dera
Ghazi Khan, Changa Manga

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**TOTAL ECONOMIC VALUE OF
TOURISM (IN BILLION PKR)**

OVERALL 62.4



CONCLUSION

The findings show the sizeable economic potential i.e. almost PKR 62.4 billion, of national forest-based tourism sites. The details of province/region wise economic potential are given in the Figure 02 below. Moreover, northern areas of Pakistan primarily from GB, KP, and AJK are mostly visited due to their distinctive natural amenities. Furthermore, tourists attributed huge importance to mountainous landscape, lakes, and hiking. Likewise, financial affordability, proximity, and weather conditions were convenience attributes most appreciated by tourists.

THE WAY FORWARD

For a developing country like Pakistan, forest-based tourism can be an engine of much needed economic growth and sustainable development. The following recommendations are proposed:

-  This study estimates the huge forest-based tourism potential in Pakistan. Though, in order to ensure development in the long run, sustainable practices should be adopted that would lead to local economic development, preservation of culture and better environment.
-  Forest-based tourism encompasses numerous sub-sectors and services i.e. transport, hoteling, recreation etc. Government should ensure parallel well-planned development of supportive sub-sectors and their inclusion in bioeconomy strategies.
-  In a nature-based tourism system (including forest-based), from a supply-side perspective, natural resources, private tourism providers, public agencies are the significant pull factors to trigger travel. Therefore, integration of forestry and tourism sector is the need of an hour that will ensure positive outcomes across the board.

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