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1.0 Summary

The findings of the report and the prevailing situation in the industry, indicate, that foreign in bound tourism in Pakistan has sharply declined and trend will continue. The

Due to adverse publicity in international media, negative travel advisories, continued terrorism, and deteriorated law and order situation in the country, the prospects for revival of inbound foreign tourism are very poor in near future, however the scope for growth in domestic tourism does exists.

Concerning Punjab, this province, even otherwise, was not well promoted tourists' destination. As in past the product development, promotional thrusts, marketing campaigns, and strategies were more focused to the areas in Gilgit- Biltastian and of Khyber Pakhtoon Khawa , by both, public and private sectors.

Therefore, now in the situation, the province has to firstly develop a strong tourism base, create awareness and strengthen its domestic tourism to prepare a landing pad for foreign in bound tourism in future. These campaigns may be divided in the short, and medium term tourism planning to monitor instant results, those are spread over a span of five years. The long term planning will depend on achievements in short and medium term and may be planned later during the 4th quarter of the 5 years.

In short and medium terms, the focus for foreign in bound tourism may be shifted to Gulf, Saudi Arabia and SAARC regions, instead of targeting long haul markets. The VF&R segment could also be focused for future contributing tourists in the economy by providing them quality assured tourism opportunities. They are continued visitors and their numbers are increased every year.

There lie potential of Sikh Pilgrimage Market, but the sector is largely controlled by government agencies and organizations and the private sector role is minimal. However the TDCP should initiate to develop on, and focus the Sikh Pilgrimage Market in UK, USA and Canada. The Sikh population in these regions is near to half a million, but less than 1% of the community is traveling to Punjab in Pakistan for Pilgrimages. In 2007, the numbers of Pilgrims were 4091 and in 2008 were 2724. The national carrier's support is required to promote Sikh Pilgrimage Market.

The Buddhists Pilgrimage Potential in Districts of Punjab invites a great attraction for follower of the Buddhism. This sector, in short term planning may be promoted and confined in to the areas of the Attock District. In medium term programs, the strategy could be expanded to Khyber Pakhtoon, as major attractions of Buddhist fall in that Province.

Over all, and under the prevailing conditions, Punjab has to relay much on its potential through promotion of domestic tourism for next few years and perhaps this would be an opportunity to strengthen domestic tourism base and infrastructure supporting to develop and consolidate tourism culture in the Province.

The tourism strategy is largely focused on product development and awareness programs. In new products, Eco-Tourism, Agro-Eco Tourism, and Village Tourism have been given importance. The culture and heritage tourism will also have the significant role. The nature tourism in the protected and rural areas shall be identified, developed and promoted through formation of

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community based organizations with the help of districts governments. The communities' ownership to the tourism activities will strengthen security and facilitations to the visitors. The process will provide direct economic benefits to the communities living around those tourism resource generating areas.

The objectives of tourism development and promotion are now aimed to include and are linked to educate nation and provide leisure and pleasure opportunities through "tourism for all" concept. The aims of the concept are to promote tourism as a basic human right and a way of life, to stimulate communication about the benefits of tourism as the most prospective economic activity for the local communities, to enhance cooperation between destinations and the tourism industry, and to link individual tourism entities to the larger community of international tourism. The nation wise following goals are set.

- a) Achieve through Tourism, a constructive social change in the society to develop love, affections, and sense of belongings and ownership to the province/country.
- b) Tourism, an instrument to manage the flow of urban tourism economy to rural areas to uplift the socio-economic conditions of the people in the rural areas, provide livelihood and develop mutual understanding and respect between people and societies.
- c) Achieve through tourism to position Pakistan in the World as enlightened society having diverse tourism products and attractions for the foreign tourists and investors in hospitality services.
- d) Achieve through Tourism, the overall socio-economic uplift and sustainable development of the destination regions in Punjab.

The 36 districts of Punjab are fertile tourism regions and every district has a range of tourists' attraction. These attractions shall be identified, developed and showcased for the tourists through community participation. However to develop a cluster, districts have been grouped to form branded tourism zones for commercialization and tourists to have varieties of options for year round tourism activities and avoiding concentration only in certain areas, thus tourism activities to contribute in the economy of every district

The following zones are proposed.

- Zone 1, Attock, Rawalpindi, Chakwal
- Zone 2, Gujrat, Jehlum, Sargodha, Mandi Bahauddin
- Zone 3, Mianwali, Khushab, Bhakar, Layyah, Muzafargarh
- Zone 4, Sialkot, Gujranwala, Narowal
- Zone 5, Lahore, Sheikhupura, Kasur, Okara, Nankana Sahib
- Zone 6, Faisalabad, Toba Tek Singh, Sahiwal, Khaniwal
- Zone 7, Multan, Vihari, Lodhran, Pakpattan
- Zone 8, Bahawalpur, Bahawal Nagar, Rahim Yar Khan
- Zone 9, D.G. Khan, RajinPur
- Zone 10 Hafizabad, Chinot, Jahnag

The criterions to build up the zones are connected with their geographic position and the potential tourism resources in them. The local government may help to develop an inventory of the tourists' attractions and the resources, historical backgrounds and infrastructures, security issues,

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hygienic conditions access etc. The TDCP, other public sector and private sector enterprises and entrepreneurs will market and promote tourists activities in these zones.

“Tourism for All” concept shall be developed and supported by public sector tourism managers. The mega tourism projects may be shelved for the time being and SMEs shall be strengthened and adopted as strategic approach. A wholly participative and well coordinated approach is recommended to be developed among public sectors stake holders. The Public to Public and PPP concept shall be promoted and strengthened.

The tourism strategy is also linked to the socio-economic development in the rural areas, poverty alleviation, improving livelihood and addressing to cultural preservation and biodiversity conservation, thus scope of donor funding to meet the financial impact is possible option created. However for the sustainability of tourism and continuity in the activities, Establishment of an Endowment Fund for Tourism Sustainability is also suggested

To fill up the existing gaps and to build upon, a 5 years action plan has been developed based upon strengthening the following identified weak areas.

- Information Management.
- Tourism Enterprises Development.
- Product Development and Quality Assurance.
- Marketing, Promotion and Awareness Creation.
- Human Resource Development and Training.
- Institutional Development.

Above components of the strategy is scrutinized in to 48 interventions to form an action plan, with initially, five major concepts developed for public private partnership projects.

Public Private Partnership Projects

- 1 Lahore Branch, BRBD, Link Canal, may be developed as means of public transportation and to strengthen tourism cluster in City, through PPP venture and may be named, Lahore Water Taxi Project.
- 2 Tourists Accommodations in Salt Range Wetland Complex, a group of 5 Lakes, along with Thal desert, may be developed and promoted as eco tourism complex, and named “Punjab Lakes Zone Tourism Complex” through PPP venture
- 3 Tourists Site Development (Tourists Accommodation) at Chashma Barrage, District Mianwali, and may be named “Indus River Tourism Site at Chashma Barrage” through PPP venture
- 4 Tourists Site Development (Tourist Accommodation) at Taunsa Barrage, District Muzaffar Garh, and may be named “Indus River Tourism Site at Taunsa Barrage” through PPP venture
- 5 Tourists Site Development (International Standard) at Khewara Salt Mines, District Jhelum and may be named “ Khewara Salt Mines Tourism Complex”
- 6 Joint Venture between TDCP/NATCO or TDCP/DAEWOO to develop a fleet of Tourism Vehicles at Lahore/ Rawalpindi/ Multan to facilitate tourists, and tourism service providers for quality transport provision.

Action Plan

Information Management

- 1 Innovate in tourism data collection system.
- 2 Create and implement Signage standards and system.
- 3 Create Tourism “Best Practice” Portal
- 4 Develop a Digital Library For Tourism Media Resources.
- 5 Develop Website of Potential Tourism Resources of each District
- 6 Develop Marketing Decision Support System (MDSS)
- 7 Over Come the Fear Factor of Tourism in Pakistan

Tourism Enterprises Development

- 8 Develop Tourism Enterprises through PPP with private sector inside the country for domestic tourism and out side for inbound International Tourism by offering TDCP franchise.
- 9 TDCP/ Daewoo or TDCP/ NATCO to develop a Transportation Tourism Infrastructure in the province.
- 10 Create Tourism Financial Incentive Mechanism.
- 11 Encourage Small Tourism Enterprises (Accommodation) Development.
- 12 Strengthen Private Sectors Tourism Enterprises through offering Franchise of TDCP to Hotels, Tour Operators and Handy Crafts Shops.
- 13 Investments pre feasibility reports in tourism sectors, principled on SMES be developed, for over seas Pakistanis in the rural areas.

Product Development and Quality Assurance

- 14 Develop Mining and Mineral Resource as Tourism Product
- 15 Develop eco-tourism in protected areas
- 16 Develop Agro eco Tourism Concepts in Villages
- 17 Developed Linkage of Religious Pilgrimage to Cultural and Heritage
- 18 Focus on Developing Desert Tourism Product
- 19 Develop Adventure Tourism
- 20 Develop Irrigation Canals as Tourist Spots.
- 21 Promote Cultural Events and Traditional Celebrations Tourism Zones and Districts
- 22 Develop Groups of Products in Tourism Zones and Develop
- 23 Develop Punjab Handicrafts as tourism Product
- 24 Develop sets of tour itineraries to access product Regions.
- 25 Plan and Develop Protected Areas Rest Houses/ Dak Bungalow System

Marketing and Promotion

- 26 Develop Joint Venture between TDCP and Punjab Education Foundation for Introducing Tourism Awareness Programs from class 6th to class 10th, as pilot project
- 27 Develop Joint Venture between PIA/ HOTEL/ TDCP or Private Sector to promote Punjab as Cheap and valued destination for foreign tourists as Public/Private Funding Partnership.
- 28 Promote Annually Punjab Tourism & Handicrafts Exhibitions Inviting Tour Operators from Gulf and Saudi Arabian Region
- 29 Plan Quarterly joint seminars/ exhibitions in collaboration of TDCP/ PSIC in Rawalpindi, Lahore, Multan and Monthly Programs in others districts providing opportunities for surrounding rural areas communities to participate.
- 30 Develop, Encourage and sponsor Cultural Events
- 31 Strengthen, Relocation and Opening of New TICs
- 32 Develop Tourism Products Niche Marketing Strategy.
- 33 Promote Tourism Market Diversification.
- 34 Participate in SAARC, and Gulf Area Tourism Marts

Human Resource Development and Training

- 35 TDCP, Institute of Tourism & Hotel Management, should be strengthened.
- 36 Qualified private sector entrepreneurs to be encouraged to establish tourism institute in less developed areas.
- 37 Develop Tourism related courses in consultation with Private sector.
- 38 Regular Professional Courses to be arranged for the staff working in TDCP and T&RRD.
- 39 Review and Develop standards of Tourism Service Providers Agencies.

Institutional Development

- 40 Strengthen TDCP, by inducting members in board of directors, from Public Sector Stake holders.
- 41 Department of Tourists Services to be strengthened, by implementing strict control and monitoring mechanism of licensing and maintaining the required standards prescribed in tourism acts.
- 42 Transport Rental Companies may be regulated through Tourism Department.
- 43 Develop Local Tourism Associations.
- 44 Define Limit of Acceptable Change (LAC) for Cultural and Natural sites.
- 45 Develop Provincial Consultative Committee on Tourism Promotion and infrastructure development.
- 45 Identify Tourism Potential in Each District, and develop sites through established Tourism Associations/CBOs.
- 46 Establish an Endowment Fund for tourism Sustainability

Conclusion

As assessed, unfortunately tourism in Punjab, will not be able to contribute materially in financial terms and in attracting foreign tourist in near foreseeable future, but with implementation of the foregoing strategy, the provincial tourism resources will be known in the surrounding domestic and regional markets and the province will gradually attain a strong tourism base having matured tourism culture, trained man power and developed tourism infrastructure to cater inbound international tourism in medium and long term strategies.

The strengthened and a well coordinated net work is expected to be developed among public sectors stake holders and between public and private sector for better management of the tourism resources and escalating to opportunities for PPP , in even smaller ventures.

It is also likely that subsequent to implementation of the action plan will lead to the initially creation of more than 2000 jobs in private sectors; will support poverty alleviation and rural developments, capacity building of tourism entrepreneurs and growth in about 50 new, small and medium size tourism enterprises, fully capable of meeting future international needs and standards, beside social goals having being achieved. The tourism culture in the province will be flourished; love affection and social harmony among the native people will be developed, ultimately creating in them, the sense of belongings and ownership to the country.

2.0 List of Acronyms

SWOT	Strength, Weakness, Opportunities. Threats
MoT	Ministry of Tourism
STERP	Short Term Emergency Recovery Program
K.P.K	Kyber Pakhtoon Khawa
A.J&K	Azad Jamun & Kashmir
S.D.TC	Sarhad Tourism Development Corporation
T.D.C.P	Tourism Development Corporation of Punjab
P.T.D.C	Pakistan Tourism Development Corporation
VF&R	Visit Friends & Relatives
PRMP	Punjab Resource Management Program
PGEIP	Punjab Government Efficiency Improvement Program
WTO	World Tourism Organization
GoP	Govt of Pakistan
ICT	Islamabad Capital Territory
FANA	Federally Administrative Northern Area
FATA	Federally Administrative Tribal Area
FDI	Foreign Direct Investment
GEF	Global Environmental Facility
KPK	Khyber Pukhtoon Khawa
SME	Small and Medium Enterprises
NGO	Non Governmental Organization
UN	United Nation
SAARC	South Asia Association for regional Cooperation
CBO	Communities Based Organizations
PEF	Punjab Education Foundation
FAS	Foundation Assisted Schools
TMA	Tehsil Municipal Administration
PATO	Pakistan Association of Tour Operators
NATCO	Northern Area Transport Corporation
PSIC	Punjab Small Industry Corporation
TAAP	Travel Agent Association of Pakistan
OPF	Over Seas Pakistani Workers Foundation
SAMEDA	Small & Medium Enterprises Development
PUNJUM	Punjab Mineral Development Corporation
FW&FD	Forestry, Wildlife and Fisheries Dept
TDA	Thal Development
BDA	Bhawalpur Development Authority
TAAP	Travel Agent

3.0 Vision, Mission, Strategy

Vision for Tourism in Punjab

- 1) Promote Punjab as an attractive destination and present its beauty and diversity to the world through structured tourism.
- 2) A, prosperous Punjab, with its people in unification, love and respect among themselves, sense of belonging, feelings of ownership to the country and offering warm hospitality to the visitors on the land of Punjab, from any region, country, race or religion .

Mission

Form Tourism Cluster by developing, exploiting, promoting, marketing and regulating diverse tourism products in the Punjab.

Goals and Objectives

- A) Achieve through tourism, a constructive social change in the societies.
- B) Divert through tourism, the flow of urban economy to rural areas to uplift the socio-economic conditions of the people living in the rural areas and develop mutual understanding and respect between people and societies.
- C) Achieve through tourism to position Pakistan in the World as enlightened society having multi dimensional tourism products and attractions for the foreign tourists and investors in hospitality services.
- D) Achieve through Tourism, the overall socio-economic uplift and sustainable development in the destination regions of the Punjab Province.

Strategy

The tourism strategy is aimed at developing, regulating and making the powerful awareness of the provincial tourism resources, particularly emphasizing on cultural heritage sites, nature tourism, adventure and spiritual tourism through “tourism for all “concept. Pledges are made for making the stay of the tourists, comfortable, memorable, educational, informative, cost saving, reliable and safe, so that, the tourists could be encouraged to undertake tourism journeys more frequently on regular provisions.

4.0 Brief Project Introduction and Background

The Punjab Tourism Strategy Development Process is a component of Punjab Resource Management Program. PRMP is a policy and governance reform program launched with the assistance of Asian Development Bank. The ADB has provided US\$ 650 million to Punjab Government for undertaking strategic reforms under PRMP. In 2007, the program entered into its second generation of reforms and the Punjab Government Efficiency Improvement Program (PGEIP) was launched under PRMP- II umbrella. Over all, 3 Sub-Programs (SP) under PGEIP are linked to a total budgetary support of US\$ 750 million. In PGEIP one of the core policy areas for reforms includes, Private Sector Development in Punjab, seeking to improve service delivery with particular emphasis on pro-poor sectors through structural reforms in system and process to manage public resources. This program aims to help improve the overall functioning of provincial, district and local governments and the quality of public service. Government of Punjab has recently completed SP2 and has embarked on SP3 of PGEIP. During this phase the Tourism Department has requested PRMP for technical assistance to develop the Tourism Sector Strategy in the Province of Punjab.

5.0 The Strategic Planning Process

Various models and approaches to methodology for developing the tourism strategy were studied. It was likely that this study would require a huge amount of information from different stakeholder to formulate a final report therefore stating broadly, beside public sector tourism managers, it has involved tour operators, travel and support services agencies, media, road and highways authorities, law enforcement agencies, forest department, irrigation and wildlife departments, park management, educational institutions, community representatives and also other stake holders, market players and informal sectors. A critical review of the market behavior, technical viability, present and future scenarios of tourism in Punjab, the objectives, and to address the issues adequately, a tailor made methodology was developed. The study was being divided in to wide phases of AS-IS Analysis and TO-BE Scenarios. In the first stage of AS-IS Analysis, the stock of the present situation and the happening on the ground were recorded. In the second phase after, a TO-BE Scenario was developed by considering the finding of the first phase and projecting the desired stage, followed by an action plan to achieve the objectives. The methodology was based on a participatory planning process. The inception report of the study was prepared and its conceptual approach was shared with more than twenty numbers of stake holders, representative and the people involved in tourism business and later, comments were invited from the major stake holders. In the preliminary consultations with the stake holders, the conceptual framework was developed on evolving an organized tourism culture in the province and in the country, bringing tourism with in the access of the majority as well as addressing poverty in the rural areas through developing eco, agro eco and village tourism.

5.1 Methodology

The following table shows the flow of activities and phases of adopted methodology. The table is for illustrative purposes only and does not recommend that the study was conducted in purely a linear fashion.

Matrix Flow

AS – IS ANALYSIS			TO – BE SCENARIO		
Industry Situation Analysis	Location Analysis	Competition Analysis	TO – BE Scenario Development	Proposed Interventions	Gap Analysis Action Plan
<ul style="list-style-type: none"> • Desk Study • Meetings with key market players and stakeholders • Review of existing governance and management structure • Present tourism market 	<ul style="list-style-type: none"> • Assessment and evaluation of existing infrastructure • Districts Of Punjab Province 	<ul style="list-style-type: none"> • Comparative tourism industry • Review of - Tourism policies of countries in South Asian Region 	<ul style="list-style-type: none"> • SWOT Analysis • Future Trend and state desired • Human Resource Development • Stakeholders Consultations Work Shop 	<ul style="list-style-type: none"> • Public Sector • Public Private Partnership • Private Sector 	<ul style="list-style-type: none"> • Action Plan • Strategies development

5.2 Definitions and Source of Data

The definitions of Foreign Tourists and of the Domestic Tourists are based upon and taken from the Ministry of Tourism reports 2008 & 2009. Most of the data is collected from MoT, compiled by them based on the tourism survey 2000, a document of GoP and subsequently another survey in 2008, which is under publication process.

5.2.1 Foreign Tourist

The term “ Foreign Tourist” is used to describe a person irrespective of his/her nationality, race, age, sex, language, religion, etc, who visited Pakistan for any reason other than seeking gainful employment, and whose duration of stay was for 24 hrs or more but not more than one consecutive year. All over seas Pakistanis traveling on foreign passports whose usual place of residence is out side the country, fell with in the purview of this definition.

5.2.2 Domestic Tourist

Domestic tourist is a person in Pakistan regardless of his/her nationality, age or sex who travels to a place within the country other than his/her usual place of residence for a period of at least 24 hrs but less than six months for any reason other than following an occupation, remunerated at the place visited. The motivation for such a visit could be pleasure/ recreation/ holidays, sports, business, family visits, mission, meeting, conference, health, study, religion, or social call, etc.

5.2.3 Sources of Data

MoT has so far conducted 3 tourism surveys, the first one was in 1979-80, the second one in 2000 and the third one in 2008, which is not yet published. However for being more close to the real situation, the findings of 2008 survey along with 2000 have been utilized in this report.

5.2.4 Foreign Tourism Survey 2000

The Source of information for tourist arrival (viz volume) is Federal Investigation Agency (an organization of the Ministry of Interior).The data is compiled as (i) Personal Identification Secure Comparison & Evaluation System (PISCES), (II) Embarkation and Disembarkation cards filled in by the foreign visitors at some border check posts.

The value statistics are provided by the State Bank of Pakistan collected by them from the normal banking system.

The visiting tourists profile was assessed through the sample survey and interviews of 9213 tourist were conducted at entry point position at the time of their departure in 2000.

5.2.5 Domestic Tourism Survey 2000

The quantum and features of “Domestic Tourism” are estimated on the basis of overall passenger traffic, according to the methodology used in tourism Survey 2000.The Domestic Tourism Survey was carried out in selected house holds of all the four provinces of the country covering both urban and rural areas sample survey base, The sample families of domestic tourism survey is presented in the tables.

5.2.6 Coverage by Province in Survey 2000

Table 1

Province	Families Conducted (Nos)	Percentage
Punjab	6000	59.1
Sindh	2122	20.9
N.W.F.P (at survey time)	1264	12.5
Baluchistan	563	5.5
N .A (at survey time)	201	2.1
Total	10150	100

Source, Survey 2000. MoT

5.2.7 Estimated Total Quantum of Domestic Tourism in 2000

Table 2

S.No	Item	Units
1	Household Survey	Nos 10510
2	Tourists	Nos 18361
3	Average Tourist Per Household	Nos 18361/10150= 1.8
4	Total Households in 1998 (as per census)	(Million Nos) 19.7
5	Estimated Households in 2000(Rate of increase 2.6%)	Million Nos 20.7
6	Tourists	Million Nos 20.7 x 1.8 = 37.3

Source, Survey 2000. MoT

5.2.8 Foreign Tourists Survey 2008

The Source of information for tourist arrival (viz volume) is Federal Investigation Agency (an organization of he Ministry of Interior).The data is compiled as (i) Personal Identification Secure Comparison & Evaluation System (PISCES), (II) Embarkation and Disembarkation cards filled in by the foreign visitors at some border check posts.

The value statistics are provided by the State Bank of Pakistan collected by them from the normal banking system.

The visiting tourists profile was assessed through the sample survey and interviews of 15177 tourists were conducted at entry point position at the time of their departure in 2008.The actual sample size at the different survey points has been given as under. The assessments of other tourism components in survey, different numbers of sample were interviewed for percentage data.

Table 3

S.No	Exit Point	Sample Nos (Actually Collected)
1	Karachi Airport	4500
2	Lahore Airport	3001
3	Lahore Railway Station	596
4	Wagha, Lahore	365
5	Islamabad Airport	5010
6	Quetta Airport	53
7	Torkhum	500
8	Peshawar Airport	401
9	Chaman	499
10	Taftan	203
11	Sust	49
	Total	15177

5.2.9 Domestic Tourism Survey 2008

While the Domestic Tourism Survey in the year 2000 was essentially a house hold survey, where in 18361 domestic tourists were identified separately, the domestic tourism survey 2008 targeted around 20,000 domestic tourists, out of which 19979 responded directly.

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These individuals were carefully selected and fell within the purview of the definition of domestic tourists. These individual were all staying at different hotels during their trips and were interviewed directly.

The domestic Tourism survey was carried out for MoT at selected hotels in all four provinces, AJK, ICT, FANA, and FATA through out the country covering both urban and rural areas. The data covered both urban and rural areas. The data included individuals covered by different areas as demonstrated in the table. The assessments of other domestic tourism components in survey, different numbers of sample were interviewed for percentage data

Table 4

Province	Individuals	Percentage
Punjab	9631	48.2
Sindh	2583	12.9
NWFP	4409	22.1
Balochistan	1958	9.8
ICT	564	2.8
AJK	237	1.2
FATA	585	2.9
FANA	12	0.1
Total	19979	100

**As –Is Analysis,
Situation Analysis**

6.0 Tourism Overview & Situation Analysis

Under mentioned four sectors plays a significant role in assessing tourism profile.

- Tourism Resource Diversity
- Tourism Policy Frame Work
- Tourism Stakeholders
- Tourism Infrastructure
- Tourism Market Trends

6.1 Tourism Resource Diversity in Pakistan

Pakistan has following diversified potential tourism resources, that could keep the tourism business rolling year round, but presently tourism is tagged to summer seasonal proclivities and preferences activities, resulting into high cost for tourists and leaving untapped social and economic benefits from the sector which could otherwise have been made effective use of. Pakistan tourism resources can be classified in to, as under.

∴

- Coastal Zone.
- Natural Conservation Areas.
- Natural Recreation Areas.
- Cultural Heritage Sites.
- Religious Sites.
- Adventure Zones.
- Pakistan Wetland Zones
- Cosmopolitan Cities

The combinations of the above eight potential tourism resources have placed Pakistan in a unique position as an attractive tourists' destination. It is unfortunate that, internationally only one tourism resource has been exploited so far, i. e, adventure tourism, and Pakistan as tourism destination is merely branded with this segment.

6.1.1 Tourism Resource Diversity in Punjab

Rich diversified tourism resources are available in the Punjab. Out of the eight identified tourism resources, seven exist in Punjab region. All the 36 districts of Punjab, with the exception of Rawalpindi, Chakwal and, Gujranwala, have the major rivers flowing both sides or either side of the districts, giving prominence to the rich biodiversity and to related tourism attractions. The network of irrigation canals spread all over the province and the forest coverage on 249,333 acres of area has developed habitats of varieties of biodiversity and species. Such types of eco systems are rare in the world. These multiple eco-systems, rich history and the cultural background of the province have developed following tourism resources.

6.1.2 Natural Conservation Areas

Nature Conservation areas are habitats which contribute to the biodiversity, By the definition the nature conservation areas are land, water and geological features which have been naturally colonized by plants, and animals and which are accessible on foot. These kinds of areas often

serve as an important component in a country's tourism industry, attracting many visitors from abroad as well as locally.

Attractions, Birds Watching, Caves, Rain Forests, Hiking, National Parks

Lead, Wildlife Tourism, Eco-Tourism and Research Tourism

6.1.3 Natural Recreational Areas

Natural and wilderness areas, offering wide range of recreational facilities encompassing immense natural beauty are components of this segment.

Attractions, Amusement Parks, Aquariums, Rain Forests, Tennis Courts, Gardens, Golf Course, Parks, Picnic Areas, Train Rides, Zoos, Comedy Clubs, *Concerts*,

Lead, Seasonal Tourism, Recreational Tourism, Eco Tourism

6.1.4 Cultural Heritages

These are the legacy of physical artifacts and intangible attributes of a group or society that are inherited from the past generations, maintained in the present and bestowed for the benefit of the future generations. Often though, what is considered culture heritage by one generation may be rejected by the next generation, only to be revived by a succeeding generation.

Physical or tangible cultural heritage includes buildings and historic places, monuments, artifacts, etc., those are considered worthy of preservation for the future. These include objective significance to the archaeology, architecture, science or technology of a specific culture.

Attractions, Amusement Parks, Aquariums, Rain Forests, Tennis Courts, Gardens, Golf Course, Parks, Picnic Areas, Train Rides, Zoos, Comedy Clubs, *Concerts*.

Lead, Village Tourism, Agro- Eco Tourism, Leisure Tourism, Culture Tourism, Heritage Tourism,

6.1.5 Religious Tourism

Religious tourism, also commonly referred to as faith tourism, is a form of tourism, where by people of faith travel individually or in groups for pilgrimage, missionary, or leisure (fellowship) purpose. These include sites related to Muslim saints and mystics, Mosques, Buddhists, Sikhs and Hindu and Christine Shrines.

Attractions, Chapels, Churches, Missions, Mosques, Spirituality, Temples. Gurdwarars,

Lead, Religious Tourism

6.1.6 Aventure Zones, Déserts

Adventure tourism is a type of travel involving explorations, travel to remote, exotic and possibly hostile areas i.e. mountaineering, trekking, walking, white water rafting, kayaking, fishing, jungle visit safaris, paragliding, mountain biking, road cycling, birds and animal watching, etc

Attractions, Deserts, Cycling, Expeditions, Horse Back Riding, Hunting, Mountain Biking, Mountain Climbing, Safaris, Car Shows, Ballooning, Hang Gliding, Car Rally's,

Lead, Adventure Tourism, Community Based Tourism

6.1.7 Wetland Zones

Wetlands are generally highly predicative ecosystems which provide many important benefits. These benefits may be wetland function (e.g. ground water recharge, flood control), use of wetlands or its products (site for wood collection or research site) or special qualities of the wetland (e.g. aesthetical component of the landscape or cultural significance). Wetlands have touristy, recreational, historical, scientific, and cultural values. Being on or near the water is the biggest tourist attraction.

Attractions, Beaches, Boat rides, River and Lake Fishing, Jet Skiing, Kayaking, Rafting, River Cruises, Sailing, Scuba Diving, Surfing, Swimming Pool, Water Parks, Water Skiing, Dolphin Watching

Lead, Eco Tourism, Recreational Tourism, and Adventure Tourism.

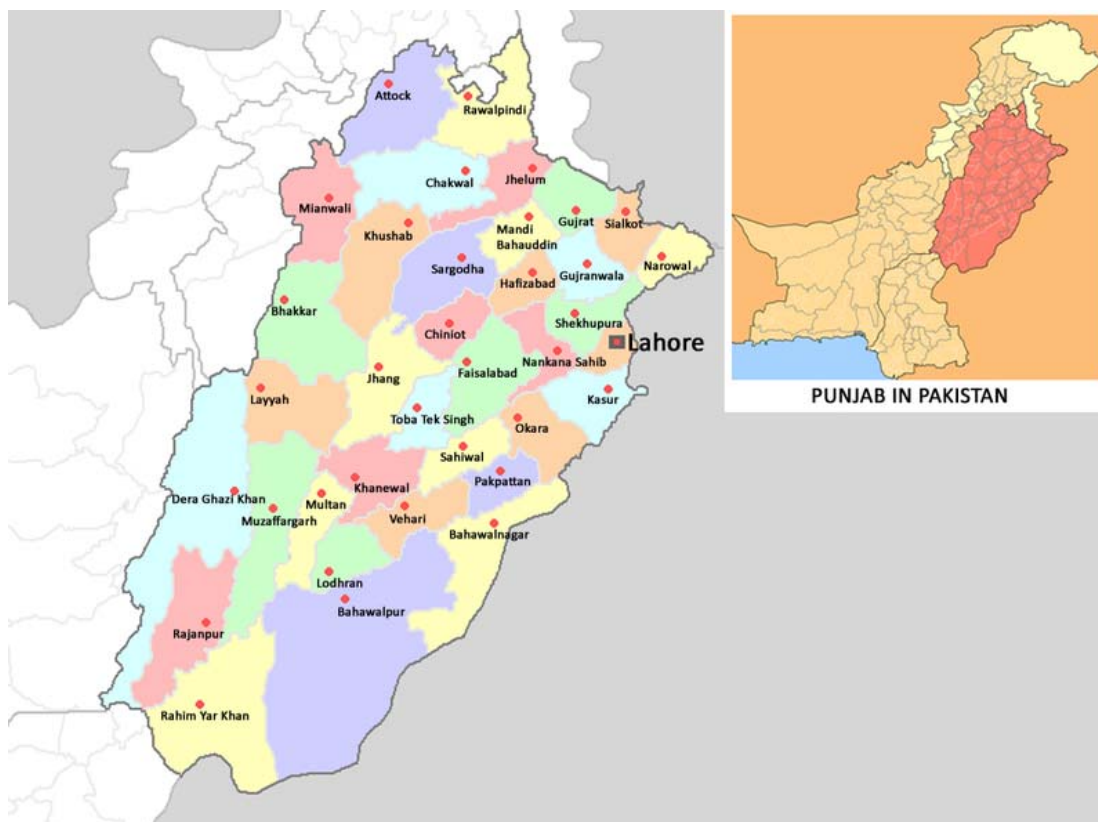
6.1.8 Cosmopolitan Cities

The cosmopolitan cities play feeder roles to the small tourism destination beside in themselves having leisure and culture tourism potential. Tourism in such cities is exploitable with the improvement in service providing technologies and mainly contributed by reliable and comfortable transportation system to facilitate a large number of people in a short space of time to travel to places of leisure interest, so that greater numbers of people could begin to enjoy the benefit of leisure time.

Attractions, Public Parks, Shopping Centers, Cinemas, Culture Events

Lead, Mass Tourism

6.1.9 Tourism Potential in Punjab



Punjab Districts Location Map

The Province of Punjab is Pakistan's most populous region with about 56% of Pakistan's total population, i.e. 92,593,586, covering an area of 205,344 sq km with 36 (thirty six)districts included in it.

The province is a fertile region along with river valleys. Sparse deserts are found in the province including the famous Cholistan desert. The Punjab landscape is heavily irrigated with irrigation canals running through out the province. Extensive irrigation has made it a rich agricultural region. The canal irrigation system is the unique and one of the largest in the world. Wheat and cotton are the main crops. Other include, rice, sugar cane, millet, corn, oil seeds, pulses, vegetables and fruits.

Weather extremes are notable from the hot south to the cool hills of north. Punjab region temperature range from -2C to 40C, but some time may cross 54C and may drop to -5C in winter. The rich recorded history of Punjab consists of different eras, i.e. the ancient period, the Greeks, Central Asians and Persians, Arrival of Islam, Moughals period, Afghans, Pashtuns, Pathans period, Sikhs era and the British Period.

Cultural Heritage is rich, and is spread over on year around festivals, Urs. The fairs and the festivals of Punjab reflect the entire gamut of its folk life and cultural traditions.

6.1.10 Tourism Potential in Districts

A review was done to assess the tourism resources in the province for supporting the development and it was found that the each district in the province carries tremendous untapped tourism potential that can play a significant role in developing socio-economic conditions of the area by directly addressing to the poverty alleviation and employment generating opportunities in the rural areas.

Table 5

S.No.	District	Tourism Resource Zones
1	Attock	Cultural Heritage, Religious Attractions Zone
2	Rawalpindi	Cultural Heritage, Natural Recreational Areas, Natural Conservation Zone, Cosmopolitan City
3	Mianwali	Wetland Zone, Cultural Heritage, Natural Conservation
4	Khushab	Natural Conservation Areas, Natural Recreational, Cultural Heritages Sites, Wetland Zones
5	Jehlum	Natural Conservation Areas, Cultural Heritage Sites, Wetlands
6	Sargodha	Natural Recreational Areas, Fruit Gardens, Agriculture
7	Gujrat	Cultural Heritage , Religious Sites
8	Bhakkar	Desert Adventure, Culture Heritage, Agriculture
9	Narowal	Agriculture, Religious Tourism
10	Gujranwala	Cultural Heritage, Religious Tourism
11	Sialkot	Wet land Zone, Cultural Heritage Sites
12	Jahang	Cultural Heritage Sites, Religious Sites, Wetland Zone
13	Leah	Cultural Heritage Sites, Wet land Zone
14	Sheikhupara	Cultural Heritage Sites,
15	Lahore	Cosmopolitan City, Cultural Heritage, Wet land Zone
16	Faislabad	Natural Conservation Areas, Cultural Heritage Sites
17	Tobateksingh	Cultural Heritage Sites
18	Kasur	Wet land Zone, Cultural Heritage Sites

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19	D.G.Khan	Wetlands Zone, Cultural Heritage
20	Okara	Wetlands Zone
21	Sahiwal	Cultural Heritage ,
22	Khanewal	Cultural Heritage
23	Vihari	Wetlands Zone, Cultural Heritage Sites
24	Multan	Cosmopolitan City, Cultural Heritage Sites
25	Lodhran	Cultural Heritage Sites
26	Muzafarghar	Wetland Zone, Cultural Heritage Sites
27	Ranjan Pur	Wetland Zone, Cultural Heritage Sites
28	Rahimyar Khan	Desert, Cultural Heritage Sites
29	BhawalPur	Natural Conservation Areas, Cultural Heritage Sites, Desert,
30	Bhawalnagar	Wetland Zone, Cultural Heritage Sites
31	Pakpattan	Religious Sites
32	Chanot	Cultural Heritage Sites, Natural Conservation Areas
33	Hafizabad	Religious Sites
34	Mandi Bahudin	Wetland Zone, Cultural Heritage Sites
35	Nankana Sahib	Religious Sites
36	Chakwal	Cultural Heritage Sites, Natural Conservation Areas, Cultural Heritage Sites, Religious Sites

6.2 Tourism Policy Framework

Tourism policy framework based on workable strategy is weak at the federal and the provincial level. The last national tourism policy was prepared in 1990, The policy lacks directional ability on the development of tourism in the provinces. After analysis were done, it was felt that workable strategy to develop and promote tourism collectively and at the provincial level were leftover gaps in the policy. Now the present government intends to replace this policy with new one. The draft of the new policy has been prepared and is under circulation in the Provinces for their comments. The new tourism policy defines the following scope and key principles as guide lines for sustainable development of tourism sector.

- a) Leading role in tourism promotion and development will remain with the public sector, but the private sector shall be facilitated by the Government.
- b) Efforts shall be made to promote domestic and international tourism through improvements in security arrangements.
- c) Ensured sustainability and the conservations of the country's environmental and natural resources.
- d) The tourism industry will aim to develop a marketable identity focusing on selected niches and products.

Pursuant to the 18th amendment in the Constitution, abolishing the concurrent legislative list, the tourism sector has been transferred to the province to develop own strategy based on its provincial tourism potential and resources. However, all the above mentioned points are included in the report and are with in the dynamics of the developed strategy for Punjab province.

6.3 Punjab Tourism Stakeholders

The main tourism stakeholders include Public Sector Institutions, Non Governmental Organizations / Associations and Tourism Sector Related Enterprises. The public sector stakeholders are either custodian of the tourism resources or in some way are closely connected with the development efforts. The private sector stakeholders are mainly the service providers or

facilitators. Based on available exploitable tourism resources in the province, the following institution in the public and private sector are the major stake holders.

6.3.1 Public Sector Stakeholders

- 1) Agriculture Department,
- 2) Auqaf, Religious and Minorities Affairs Department
- 3) Commerce and Investment Department
- 4) Education Department
- 5) Environment Protection Department
- 6) Forestry, Wildlife and Fisheries Department
- 7) Home Department
- 8) Industries Department
- 9) Irrigation and Power Department
- 10) Information, Culture and Youth Department
- 11) Local Government & Rural Development Department
- 12) Mines and Mineral Department
- 13) Planning and Development Department
- 14) Sports Department
- 15) Tourism and Resort Development Department
- 16) Transport Department
- 17) Pakistan Tourism Development Corporations
- 18) Tourism Development Corporation of Punjab
- 19) M/o Overseas Pakistani
- 20) Pakistan Railways
- 21) Punjab Small Industries Corporation (PSIC)

The strategy involves interest based collaboration among these stakeholders.

6.3.2 Non Governmental Organizations

- 1) Travel Agent Association of Pakistan/ Punjab
- 2) Tour Operators Associations of Pakistan/ Punjab
- 3) Hotel Associations of Pakistan/ Punjab
- 4) Heritage Foundations Pakistan
- 5) International Youth Foundation
- 6) Lions Club
- 7) Asian Study Group
- 8) Pakistan International Air Lines
- 9) Private Sector Air Lines
- 10) Transport Providing Companies

Some of them are large associations with over 1000 members and can form major associations to develop and market Punjab Tourism Products.

6.3.3 Tourism Sector

Over 98% tourism industry in Pakistan is privatized and a similar ratio is in Punjab. There are 960 tour operators and 1343 travel agents in the country. The number of employment in each travel

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agency and tours operating company varies from 1 to 20. There are only fewer big agencies; some of medium sizes but a majority of them are of small, size or one-man show.

6.3.4 Punjab Travel Agents

The strength of travel agents in Punjab is 721. The main functions of this segment are limited to providing and facilitating air travelers with their traveling arrangements on domestic or international routes.

6.3.5 Punjab Tour Operators

Generally in Tourism Industry, the main role of the tour operators and their functions are divided in the following service categories:

- a) Travel companies, or agencies, that only provide accommodations, over night stays.
- b) Tourists companies or agencies that offer products such as outdoor environmental, cultural, or summer mountain trips within the country.
- c) Tourists' agencies or companies that offer comprehensive packages for inbound /outbound international tourists and these tour operators are further divided in to two categories,
 - i) *The companies that offer packages tours for culture and nature tourism.*
 - ii) *The companies that offer packages for adventure tourisms. They include Community based, Trophy Hunting Promoters.*
- d) The Travel Companies that Provide Umra and Hajj services

These kinds of service operators in Punjab are 404, most of them are Hajj/ Umra service providers, and a limited numbers of them are international tour operators. The distribution of travel agents and tours operators as per MoT data 2008-09 is as following

Table 6

S. No	Area	Travel Agents	Tour operators
1	Islamabad	97	107
2	Punjab	687	404
3	Sindh	292	342
4	Khyber Pukhtoon Khawa	236	63
5	Balochisatn	26	14
6	Gilgit Biltistan	2	30
7	AJK	3	-
Total		1343	960

Source MoT

6.3.5.1 Preferred Tour Operators

Out of the above 960 tour operators, about 80 have been listed with the MoT as preferred tour operators. They have authorization from GoP for processing of visas on arrival for group tourism from tourist friendly countries. These tour operators have contacts in international markets, sponsor international inbound tourism and are also involved in promotion of domestic tourism.

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Table 7

S.No	Area	Tour Operators
1	Islamabad	16
2	Punjab	29
3	Sindh	30
4	Khyber Pukhtoon Khawa	3
5	Balochisatn	-
6	Gilgit Biltistan	2
7	AJK	-
	Total	80

Source MoT

6.3.5.2 TDCP Tourists Information Centers

TDCP has opened altogether, 7 TIC, 5 in Lahore region, at Air port, Shahi Hamam, Lahore Fort, Shalimar Garden, and at Gujranwala, and one in Muree, and Rawalpindi

6.3.6 Investors

Investors are important tourism stakeholders. Tourism has a status of industry, but concessions/ facilities by the banks and finical institutions have not been offered to this segment. While exploring the scope of FDI in tourism, it is observed that as per BoI details, no inflow is recorded in this sector since, 2000.

6.3.7 International Donor Projects and Programs

No significant contribution from the donor agencies is sought in Tourism Sector. How ever in environment sector, the federal level programs were funded by GEF and World Bank i.e. Protected Area Management, Pakistan Wetland Program, Mountain Area Conservancy Program.

6.4 Tourism Infrastructure

Basic Infrastructure is available in the country including the Punjab province, i.e, hotel accommodation, transportation, communication, water and electricity, but they are not properly regulated, resulting in exorbitant prices and substandard tourism services. For the promotion and the development of tourism a considerable improvement in the quality and standard material services with due emphasis on cost-effectiveness, need to be brought about. Presently the province has following categories of hotels and number of rooms available. The transportation segment has not been properly regulated; therefore, there were difficulties in collection of authentic data.

6.4.1 Province wise Hotel Establishments & Rooms (Private Sector)

Table 8

S.No	Province	No Of Hotels	No Of Rooms
1	Islamabad	62	2263
2	Punjab,	727	16943
3	Sindh	163	7595
4	NWFP, Now K.P.K	402	7063
5	Balochistan	159	3551
6	Gilgit-Baltistan	130	2162

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7	AJ& K	63	1175
	Total	1706	40752

Source, MoT, 2008-2009, hotel & restaurant profile

A total of 24 hotels are categorized as 4/5 stars properties with **Punjab Province having 11 of them**, Islamabad 3, Sindh 6 K.P.K 1, Balochistan 2, and AJ&K having 1. On further analysis, the following number of hotels and rooms are available in each city of Punjab.

6.4.2 City wise Hotel Establishments & Rooms in Punjab Province (Private Sector)

Table 9

S.No	City	Hotel	Rooms
1	Attock	1	12
2	BahawalNagar	5	71
3	Bahwalpur	13	219
4	Chakwal	3	54
5	Dera Ghazi Khan	26	552
6	Dina	2	18
7	Faisalabad	20	562
8	Gujar Khan	1	10
9	Gujranwala	14	193
10	Gujrat	3	50
11	Hafizabad	1	7
12	Jhang	2	30
13	Jhelum	6	93
14	Khanewal	2	20
15	Kharian	2	24
16	Lahore	167	5514
17	Layyah	2	27
18	Mianwali	3	61
19	Multan	45	908
20	Muree	167	3429
21	Pakpattan	2	21
22	Rahim Yar Khan	16	242
23	Rawalpindi	185	4147
24	Sahiwal	12	171
25	Sari Alamgir	1	23
26	Sargodha	9	192
27	Sialkot	11	189
28	Vehari	4	55
29	Wah Cant	1	49
	Total Hotel Listed with DTS	727	16943

Source MoT 2008-2009 Hotel & Restaurants Profile

6.4.3 Accommodation Establishments & Rooms (Public Sector)

Table 10

S.No	Categories	Units	Rooms
1	Hotels	1	50
2	PTDC Motels	29	419
3	Public Rest Houses	143	605
4	Railway Retiring Rooms	7	47

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5	Camping Sites	1	3
6	Youth Hostels	18	819 Beds
7	YMCA Hostels	2	45
8	STDC	7	81
9	TDCP	7	28

Source MoT 2008-2009 Hotel & Restaurants Profile

6.4.4 Accommodation Establishments & Rooms in Punjab (Public Sector)

Table 11

S.No	Categories	Cities	Authority	Rooms
1	PTDC Motels	Bhawalpur	PTDC	14
		Wagha	PTDC	4
		Katas (Leased Out)	PTDC	6
		Taxila(Leased Out)	PTDC	7
2	Public Rest Houses	Mandi Bahauddin	I&P	9
		Murree	F.W& F	2
		Samly	F.W& F	2
		Ghora Gali	F.W& F	4
		Lower Topa	F.W& F	2
		Parraria	F.W& F	2
		Sarai Alamgir	F.W& F	2
3	Railway Retiring Rooms	Bhawalpur	P.R	2
		Lahore	P.R	10
		Multan	P.R	5
		Rawalpindi	P.R	11
		Taxila Cantt	P.R	2
4	Youth Hostels	Bhurbun	PYHA	32 Beds
		Katas	PYHA	25 Beds
		Lahore	PYHA	50 Beds
		Taxila	PYHA	32 Beds
5	YMCA Hostels	Lahore	-	-
6	TDCP Resorts	Jallo Park	TDCP	8 Huts
		Chiniot	TDCP	-
		Lal Sohanra National Park	TDCP	6
		Changamanga	TDCP	4
		Kallar Kahar	TDCP	12
		Fort Manro, D.G. Khan	TDCP	6
7		Patriata	TDCP	Rassurant

Source MoT 2008-2009 Hotel & Restaurants Profile

The details of the rest houses of Irrigation and forest department are not available, how ever it is estimated that about two dozens rest houses are managed by these departments, those could be utilized by tourists after renovation.

6.5 Market Trend

With input from the market players, i.e. tour operators, travel agents, hotels, transport companies, air lines and data from MoT, the domestic and international market trend is explained below.

6.5.1 Domestic Tourism in Punjab

The growing domestic tourism market could become a significant contributor in the Punjab economy. Over the last few years, the domestic tourism market has been growing. The globally increasing focused on environmental tourism and the awareness campaigns launched, the scope to develop eco tourism and agro-ecotourism in Punjab villages for domestic tourists is extremely significant.

6.5.1.1 Motivational Analysis of Domestic Tourists

The motivational analysis of the tourists done, as per the survey in 2000, and later in 2008 is reflected as under.

Table 12

S. No	Purpose of Visit	% Survey 2000	% Survey 2008
1	Business	09.8	27.2
2	Recreation/Holidays	14.2	29.6
3	Relative & Friends	-	6.8 new segment
4	Politics	-	0.4 new segment
5	Health	09.0	8.4
6	Honey Moon	-	2.3 new segment
7	Arch/Historical Sites	-	1.4 new segment
8	Education	01.7	3.5
9	Religion	05.1	0.7
10	Social Calls	51.7	Dropped
11	Meeting	01.1	Dropped
12	Mountaineering	-	1.9
13	Sports	0.5	0.8
14	Shopping	04.3	2.2
15	Seminars/ Convention	-	6.3 new segment
16	Others	02.6	7.2
	Total	100	100

Source M/o Tourism, 2008 profile and Survey 2008

6.5.1.2 Occupational Analysis of Domestic Tourists

Following table shows the professions of tourists participated in different tourism activities. The sample, 19979 tourists were interviewed during the survey period 2008.

Table 13

S.No	Occupation	Number	Percentage
1	Legislators/Senior Officers/Managers	200	1.00
2	Professional Engrs/ Doctors	1583	7.92
3	Clerks	309	1.55
4	Technical/Associate Professionals	73	0.36
5	Services/Sales Workers/ Private Jobs	3985	19.95
6	Skilled Agricultures and fishery Works	364	1.82
7	Crafts related trade workers	36	0.18
8	Plant/ Machine Workers	91	0.46
9	Elementary Occupations	55	0.27
10	Armed Forces	36	0.18

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11	Teachers	673	3.37
12	Business Man	5932	29.69
13	Journalist	36	0.18
14	Transport Workers	710	3.55
15	Sportsman	36	0.18
16	Student	3603	18.3
17	Government Officials	1383	6.92
18	House Wife	109	0.55
19	Retired People/ Senior Citizen	328	1.64
20	Nurse	55	0.27
21	Lawyers/ Barrister	109	0.55
22	Land Lords	127	0.64
23	Others	146	0.73
	Total	19979	100

In survey 2008, the highest ratio, 29.69% of business men were observed. The category of Services/Sales Workers/ Private Jobs demonstrated 19.95% and the ratio of the students tourists was 18.3% with lowest of 0.18% in Crafts related trade workers, Armed Forces and Sportsmen respectively.

6.5.1.3 Country wise Distribution of Domestic Tourists by Purpose of Visit

As per MoT data, 46.8 million tourists moved domestically within the country during 2009, and were 45.5 million in 2008 . The increase was noted as 2.9%. The both data were analyzed based on the current findings during the 2008 survey as following.

Table 14

(000Nos)

S.No	Purpose of Visit	Year 2008	Year 2009	OveAll Percentage
1	Business	12376	12729.6	27.2
2	Recreation/Holidays	13468	13852.8	29.6
3	Relative & Friends	3094	3182.4	6.8
4	Politics	182	187.2	0.4
5	Health	3822	3931.2	8.4
6	Honey Moon	1046.5	1076.4	2.3
7	Arch/Historical Sites	637	655.2	1.4
8	Education	1592.5	1638	3.5
9	Religion	318.5	327.6	0.7
12	Mountaineering	864.5	889.2	1.9
13	Sports	364	374.4	0.8
14	Shopping	1001	1029.6	2.2
15	Seminars/ Convention	2866.5	2948.4	6.3
16	Others	3276	3369.6	7.2
	Total	45500	46800	100

Source MoT, 2009 tourists profile, analyzed survey 2008

6.5.1.4 Distribution of Domestic Tourists by Purpose of Visit in Punjab

Based on the populating criteria, 56.3 % tourists' i.e 25.6 and 26.3 million were taken as the people visited Punjab in 2008 and 2009. These were analyzed by purpose of trips as following.

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Table15

(000Nos)

S.No	Purpose of Visit	Year 2008	Year 2009	Overall Percentage
1	Business	6967.5	7166.6	27.2
2	Recreation/Holidays	7582.3	7799	29.6
3	Relative & Friends	1741.8	179.1	6.8
4	Politics	102.4	105.3	0.4
5	Health	2151.7	2213.2	8.4
6	Honey Moon	589.1	606	2.3
7	Arch/Historical Sites	358.6	368.8	1.4
8	Education	896.5	922.1	3.5
9	Religion	179.3	184.4	0.7
12	Mountaineering	486.7	500.6	1.9
13	Sports	204.9	210.7	0.8
14	Shopping	563.5	579.6	2.2
15	Seminars/ Convention	1613.8	1659.9	6.3
16	Others	1844.3	1897	7.2
	Total	25616	26348	100

Source, Punjab tourists' potential was calculated at 56.3%, population out of total numbers of tourists.

6.5.1.5 Transport Used in Domestic Tourism Activities

The following percentage table indicates the different type of transport used by the tourists during the tourism activities or the journeys they under took.

Table 16

Type of Transport	Percentage
Car	19.97
Bus	48.34
Wagon	17.31
Taxi	3.66
Rail	6.45
Air Plane	3.00
Others	1.27
Total	100.00

Source Tourism Survey 2008

6.5.1.6 Length of Stay of the Domestic Tourists

The following percentage table indicates the trend on the length of the tourists stay out side their normal place of residence.

Table 17

Length of Stay in Night	Percentage
01	30.61
2-3	44.62
4-6	14.78
7-10	6.68

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11-15	1.67
16-20	0.53
21-30	0.73
31-60	0.22
61& above	0.17
Total	100.00

Source Survey 2008

The trend indicates that 44.62% of tourists prefer to stay 2 to 3 nights out side their normal place of residence, followed by one night stay by 30.61% of tourists.

6.5.1.7 Accommodation Used by the Domestic Tourists

The following percentage table indicates the various type of the accommodation used by them during the trips out side their normal place of residence.

Table 18

Accommodation	Percentage
Hotel / Motel	91.58
Rest House	0.22
Hostels	5.01
Own House	0.14
Guest House	0.74
Camping Site	0.31
Rented House	0.06
Relatives	0.49
Friends	0.83
Other	0.62
Total	100.00

Source Survey 2008

The trend of using hotels/ motels is on peak with 91.58% followed by hostels at 5.01%.

6.5.1.8 Features Impressing the Most to the domestic Tourists

The percentage table indicates the tourists' fondness to the touristry features.

Table 19

Features	Percentage
Nature & Scenic beauty	18.29
Mountains & Trekking	8.02
Culture & Folklore	3.22
Archeology sites & Historical Moments	3.92
Old Bazaar & Walled Cities	5.53
People	14.33
Climate	14.12
Local Foods & Fruits	9.56
Entertainment / Amusements	3.80
Handicrafts & Carpets	2.46
Deserts	0.16

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Sports	1.22
Shopping	12.09
Wild Life & Birds	0.71
Beaches	1.29
Others	1.28
Total	100.00

The high percentage of tourists was impressed with the nature and the scenic beauty followed by the climate and the people segments.

6.5.2 Culture Tourism

Culture tourism is an important part of tourism sector. Culture factors attracting tourists in Pakistan have architecture historical places, monuments, archaeological sites and museums that have artifacts found from archaeological and historical sites.

As 2009, data is under compilation by MoT, the 2008 culture tourism performance is analyzed as below.

During the period, 2008, in all 2.810 million people visited the historical places, the archeological sites and the museums in the country as tourists or as day visitors. Out of the total visitors 99.2 % were Pakistani and only 0.8 % was of foreign visitors. These visits were to the following popular places in the country. The highlighted sites shown in the table are from Punjab province.

6.5.2.1 The most visited historical places in 2008

Table 20

S.No	Place	City	Visitors(million)	Percentage
1	Lahore Fort	Lahore	1.207	56.9
2	Shalamar Gardens	Lahore	0.612	28.9
3	Jhangir's Tomb,	Lahore	0.142	6.7
4	Hiran Minar	Sheikupara	0.086	4.1
5	Makli Hill Monument	Thatta	0.045	2.1
6	Baltit Fort	Hunza	0.024	1.1
7	Shigar Fort	Skardu	0.004	0.2
	Total		2.120	100

6.5.2.2 The most visited archaeological sites 2008

Table 21

S.No	Place	City	Visitors(million)	Percentage
1	Moenjo Daro	Larkana	0.046	52.2
2	Banbhore	Thatta	0.046	19.3
3	Umerkot	Tharparker	0.019	21.5
4	Archaeological Remains of Takht-e-Bahi	Mardan	0.004	4.5
5	Butkara Site	Swat	0.002	2.3
	Total		0.088	100

6.5.2.3 The most visited museums 2008

Table 22

S.No	Place	City	Visitors(million)	Percentage
1	Lahore museum,	Lahore	0.231	38.4
2	Archaeological Museum	Taxila	0.068	11.3
3	Pakistan National Museum of Ethnology	Islamabad	0.132	21.9
4	National Museum of Pakistan	Karachi	0.020	3.3
5	Sindh Provincial Museum	Hyderabad	0.035	5.8
6	Archaeological Museum, Harappa	Sahiwal	0.050	8.3
7	Peshawar Museum	Peshawar	0.010	1.7
8	Pakistan Museum of Natural History	Islamabad	0.023	3.8
9	Allama Iqbal Manzil, Museum	Sialkot	0.016	2.7
10	Archaeological Museum, Saidu Sharif	Sawat		0.1
11	Quaid-i-Azam House Museum	Karachi	0.007	1.1
12	Allama Iqbal Museum	Lahore	0.009	1.5
13	Dir Museum, Chak Dara	Dir	0.001	0.1
	Total		0.602	100

6.5.2.4 City wise Visitors to Places of Culture Importance in the Country, 2008

Table23

(Nos 000)

S.No	Location	Domestic	Foreign	Total	% Share
1	Lahore	2188.11	12.38	2200.49	78.3
2	Islamabad	152.81	2.44	155.25	5.4
3	Taxila	67.32	1.14	68.46	2.4
4	Thatta	61.22	0.2	61.42	2.2
5	Moenjodaro	46.07	0.21	46.28	1.6
6	Harappa,	49.70	0.20	49.90	1.8
7	Sheikhupara	85.20	0.30	85.50	3.1
8	Hyderabad	34.54	0.03	34.57	1.2
9	Karachi	25.47	2.06	27.53	0.9
10	Umer Kot	19.40	-	19.40	0.7
11	Peshawar	9.49	0.35	9.84	0.4
12	Sialkot	15.94	0.03	15.97	0.6
13	Hunza	21.58	2.59	24.17	0.9
14	Swat	1.99	0.01	2.00	0.1
15	Takht-e-Bahi	4.05	0.15	4.20	0.1
16	Dir	0.62	-	0.62	0.0
17	Skardu	4.28	0.21	4.49	0.2
	Total	2787.79	22.30	2810.09	100

Source MoT, Culture Tourism 2008, figures includes day visitors and tourists

6.5.2.5 City wise Visitors to Places of Culture Importance in Punjab, 2008

Table 24

(000 Nos)

S.No	Location	Domestic	Foreign	Total	% Share
1	Lahore	2188.11	12.38	2200.49	90
3	Taxila	67.32	1.14	68.46	3
6	Harappa,	49.70	0.20	49.90	2
7	Sheikhupura	85.20	0.30	85.50	4
12	Sialkot	15.94	0.03	15.97	1
	Total	2415.27	14.05	2420.32	100

Source MoT, Culture Tourism 2008, figures includes day visitors and tourists

The table indicates that out of a total 2.4 million visitors to places of cultural importance in Punjab, the only 14000 were of foreign origin, i.e 1% of total visitors, rest 99 % were nationals. The trend reflects local's interest in culture places.

6.5.3 Visitors to the Places of Mining and Minerals

Province of Punjab, is blessed with substantial mineral resources, those include rock salt, gypsum. Bauxite, dolomite, fuller's earth, bentonite, silica sand, fireclay, and iron ore. Provincial Government through its established body, the Punjab Mineral Development Corporation, is accelerating the pace of exploration and development of minerals resources in a scientific and planned manner. This segment, while is a source of high revenue to the Province, also carries a significant potential of learning experience for the national youth, if a part of it is exploited for tourism purposes and is explored and developed on scientific level. The tourists resort at Khewra Salt Mines is a potential example and is lesson learnt. The number of people visited Khewara salt mines during the period 2009-2010 are as following.

6.5.3.1 Khewra Salt Mines

Table 25

2009-2010

S.No	Description	Nos	% to Total
1	Adult Pakistani National	136,664	57
2	Students, Pakistani National	100,558	42
3	Foreigners	1346	1
	Total	238,567	100

Total 237,567 people visited the Khewra Salt Mines. A high percentage of them i.e 40% is of the students, that shows the interest of youth in it. Total revenue generated through tourism activities at this site is Rs25, 656,086.

6.5.4 International Tourism

Presently, except adventure tourism, in the Northern Areas, all tourism activities are at dead slow. However in new strategy some attractions and incentives need to be offered to the tourists' for revival of the industry and moving forward i.e. cheap destinations and quality assured tourism products etc.

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The total foreign visitors entering Pakistan from all entry gateways were categorized into eleven visitors categories in survey conducted in 2000 by M/o Tourism and in 16 categories in survey 2008.

6.5.4.1 Percentage- wise Motivational Analysis of Foreign Visitors

Table 26

Sr. No	Purpose of Visit	% Survey 2000	% Survey 2008
1.	Holidays/Recreation	14.7	11.9
2.	Business	21.4	28.5
3.	Family Visit	56.0	35.6
4	Honey Moon	-	0.8new segment
5.	Meetings/Conventions/ Seminars	2.7	3.2
6	Historical Sites	-	1.25 new segment
7	Culture		1.2 new segment
8.	Archaeology/Historical Sites	0.4	dropped
9.	Sports	0.2	0.6
10.	Diplomatic	0.4	1.5
11	Shopping	-	2.4 new segment
12	Mountaineering	-	1.1 new segment
13	Media Coverage	-	0.89
14.	Study	0.9	1.25
15.	Health	0.3	1
16.	Religion	1.1	0.8
17	Others	1.9	7.6
Total		100	100

Source, Foreign Tourism Survey-2000 MoT & Survey 2008

6.5.4.2 Foreign Visitors Arrivals and Receipts Trends

Table 27

Year	Arrival in" 000 Nos"	Receipts in US\$ Million
1997	374.8	116.9
1998	428.8	97.9
1999	432.2	76.4
2000	556.7	84.4
2001	499.7	92.2
2002	498.1	105.4
2003	500.9	135.6
2004	648.0	185.6
2005	798.3	185.3
2006	898.4	260.1
2007	839.5	276.1
2008	822.8	243.5
2009	854.0	240.6

Source M/o Tourism2008/ 2009 profile

6.5.4.3 Provinces Visited by Foreign Tourists

Table 28

Province	% 2000 Survey	% 2008 Survey
Punjab	56.3	53.8
K.P.K	5.6	11.0
Sindh	33.5	28.9
Balochistan	1.5	2.6
A.J &K	2.5	2.0
Gilgit & Baltistan	0.6	1.0
Others	-	0.6
Total	Total	100

Source Tourism Survey 2008

The above table shows that 53.8% tourists visited the Punjab Province in 2008, where as in 2000 survey the percentage ratio was 56.3. The decline is 2.5%.

6.5.4.4 Punjab -Foreign Tourists Arrivals and Estimated Receipts Trends

The total tourists' arrivals in the country during 2008, and 2009, were 822,800 and 854,000. The receipts for same period were US\$ 243.5 million and US\$ 240.6. As indicated above in survey 2008, the 53.8 % share is of Punjab and, based upon the percentage ratio, following numbers of tourists visited the province and contributed in economy

Table 29

Year	Arrival in" 000 Nos"	Receipts in US\$ Million
2008	442.6	131.0
2009	459.4	129.44

Source M/o Tourism 2009 profile/ Tourism Survey 2008

6.5.4.5 Motivational Analysis of Foreign Visitors in Punjab

Table 30

S.No	Purpose of Visit	2008	2009	%
1.	Holidays/Recreation	52,670	54668	11.9
2.	Business	126,141	130929	28.5
3.	Family Visit	157,560	163546	35.6
4	Honey Moon	3540	3675	0.8
5.	Meetings/Conventions/ Seminars	14163	14700	3.2
6	Historical Sites	5532	5742	1.25
7	Culture	5311	5512	1.2
8	Sports	2655	2756	0.6
9	Diplomatic	6639	6891	1.5
10	Shopping	10622	11025	2.4
11	Mountaineering	4868	5053	1.1
12	Media Coverage	3939	4088	0.89
13	Study	5532	5742	1.25
14	Health	4426	4594	1

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15	Religion	3540	3675	0.8
15	Others	33640	34914	7.6
	Total	442,600	459,400	100

Source, Tourism Survey 2008, Punjab Share, 58.3 %

The tourists with holidays and recreation percentage are at 11.9, about 54668 in numbers, those considered participating in tourism activities in 2009 in Punjab.

6.5.4.6 Analysis of Foreign Visitors in Punjab by Mode of Travel

Table 31

S.No	Mode Of Travel	2008	2009	%
1	Air	73472	76260	16.6
2	Rail	38064	39508	8.6
3	Bus Coach	61964	64316	14.0
4	Jeep	18147	18835	4.1
5	Taxi Rent Car	155795	161709	35.2
6	Wagon	37621	39049	8.5
7	Rickshaw	23015	23889	5.2
8	Others	34523	35833	7.8
9	Total	442,600	459,400	100

Source, Survey 2008

6.5.4.7 Analysis of Foreign Visitors in Punjab by Mode of Accommodation used

Table 32

S.No	Type of Accommodation	2008	2009	%
1	Hotel/Motel	163762	169978	37
2	Rest House	4426	4594	1
3	Hostels	8852	9188	2
4	Guest House	30982	32158	7
5	Camping Sites	4426	4594	1
6	Rented Out	8852	9188	2
7	Relatives/ Friends	203596	211324	46
8	Others	17704	18376	4
	Total	442,600	459,400	100

Source, Foreign Tourism Survey, 2008

6.5.4.8 Analysis of Foreign Tourists in Punjab by Period of stay

Table 33

S.No	Stay in Days	Tourists by Percentage
1	0-15	4
2	16-30	27.8
3	31-40	43.2
4	41-50	14.9
5	61- Above	10
	Total	100

Source, Foreign Tourism Survey, 2008

The above analysis shows that 43.2% tourists stayed in Pakistan for 31-40 days as per survey 2008. More over 27.8 % foreign tourists stayed for 16-30 days followed by 14.9% tourists, who stayed for 41-50 days.

6.5.4.9 Occupation –Wise Distribution of Foreign Tourists

Table 34

S.No	Occupation	Percentage
1	Legislators/Senior Officers/ Managers	3.6
2	Professionals (Engineers/ Doctors)	14.3
3	Clerks	1.1
4	Technical/Associates Professionals	0.2
5	Service/ Sales Workers/ Private Jobs	12.2
6	Skilled Agriculture and Fishery works	1.0
7	Crafts related trade workers	0.2
8	Plant/ Machine Workers	0.5
9	Elementary Occupations	0.2
10	Armed Forces	0.2
11	Scientists	0.3
12	Teachers	4.1
13	Businessmen	28.7
14	Journalist	1.1
15	Transport Workers	1.3
16	Sportsman	0.4
17	Student	8.5
18	Govt Official	4.7
19	House Wife	10.2
20	Retired People/ Senior Citizen	1.5
21	Lawyers/ Barrister	1.2
22	Land Lords	-
23	Others	4.6
	Total	100

Source Survey 2008

6.5.5 Sikh Pilgrimage Market

The Sikh Pilgrims travel to Pakistan for visiting the Holy Shrines and to celebrate the religious festivals. The most sacred and historically important Sikh Shrines lie in Punjab Province. The current pilgrimage market can be divided into three distinct segments,

- 1- Pakistani / Local Market
- 2- Indian Pilgrims
- 3- Pilgrims coming from Europe / Canada and America

Sikh pilgrims from allover the world visits Pakistan for seven different religious occasions and festivals those are as following.

Table 35

S. No	Festivals	Date
1	Baisaki/ Vaisaki	14 th April
2	Shaheedi Din Guru Arjan Dev Jee	16 th June

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3	Death Anniversary of Mahraja Ranjeet Singh	29 th June
4	Death Anniversary of Guru Ramdas Jee	16 th Sept
5	Death Anniversary of Guru Nanak	22 nd Sept
6	Birthday Guru Ramdas	9 th Oct
7	Birthday Baba Guru Nanak	15 th Nov

6.5.5.1 Sikh Holy Shrines in Pakistan

Sikh religion was originated in Indo-Pakistan, and most of the shrines are associated with Baba Guru Nanak and his earlier life are located in Punjab. The important Shrine/ Gurdwaras are as following, where the religious prayers are performed during the pilgrimage.

- 1- Gurdwara Janam Asthan, Nankana Sahib
- 2- Gurdwara Bal Lila, Nankana Sahib
- 3- Gurdwara Pati Sahib, Nankana Sahib
- 4- Gurdwara Sacha Sauda, Farooqabad
- 5- Gurdwara Dera Sahib, Lahore
- 6- Gurdwara Darbar Sahib, Kartarpura, Narowal
- 7- Gurdwara Rori Sahib, Eimenabad
- 8- Gurdwara Chaki Sahib, Eimenabad
- 9- Gurdwara Panja Sahib, Hassanabdal

6.5.5.2 World Wide Sikh Population

The total Sikh population, world wide is about 23 million and the spread over is as following.

- 1- India 20 million
- 2- United Kingdom 550,000
- 3- Canada , 225,000
- 4- USA, 150,000
- 5- Pakistan, 80,000
- 6- Malaysia, 89,000
- 7- Singapore, 50,000
- 8- Others, 1,875,000

6.5.5.3 Sikh Pilgrims Visits to Holy Shrines in Pakistan

Table 36

Year	Indian	Foreigners	Local	Total
2000	4430	1760	33000	39190
2001	8400	700	32500	41600
2002	49	64	23200	23313
2003	763	2544	25600	28907
2004	7634	2761	26500	36895
2005	9425	3541	26600	39566
2006	10017	2539	28000	40556
2007	20363	4091	24000	48454
2008	9648	2724	31000	43372

Source Ministry of Minorities

The sharp decline in numbers of pilgrims in year 2002 was mainly because of India Pakistan boarder tension.

6.5.6 Tourists Categories

Pakistan has following tourists grouping resources. Although presently some of these resources are slow moving, mainly because of prolonged law and order situation due to the decades old terrorism in the country but people still traveling with in the country. The in bound foreign tourists are less. However these resources are not completely dried up and there are significant opportunities with some of the categories to prosper, if tourism in Punjab could be properly managed.

- 1- Domestic Tourists
- 2- Foreign Tourists
- 3- Foreign Nationals, Over Seas Pakistani, Holding Foreign Passports
- 4- Over Seas Pakistani Workers.

6.5.6.1 Domestic Tourists

Pakistan is a developing country, with a population 156 million. The proportion of Punjab at 56.3 percent ratio touches the figures of 87.2 million and 50 percent traveling population falls with in the definition of tourists. The domestic tourists has very significant role in the country and province. This segment is vital social and economical development of the province and the country.

6.5.6.2 Foreign Tourists

According to UNWTO estimates 924 million tourists traveled world wide during 2008, reflecting a increase of 1.8 percent over the previous year. This category of the tourists is sup portative in economies in the many countries.

6.5.6.3 Foreign Nationals, Over Seas Pakistani, Holding Foreign Passports

In 2009, by definition the total tourists' arrivals were 854,000. Out this figure 35.6% are over seas Pakistani origin holding foreign passports, those come to Pakistan on regular basis to visits friends and relatives. Presently this segment is not actively participating in the tourism activities, but still remains a potential target market back home, if managed. Mainly this market consists upon the people holding nationalities of UK, USA and Canada and in 2009 the arrivals in Pakistan from these origins were as following.

Table 37

1	UK	275,351
2	USA	117,465
3	Canada	42,954

Source MoT, tourism profile 2009

6.5.6.4 Over Seas Pakistani Workers

In between the period from 1981 till 2009, about 4,383,339 persons proceeded abroad for employment purpose. These numbers are spread over 121 districts of Pakistan and 11 tribal areas. Out of above numbers, the 2,254,137 persons were from Punjab. These over seas Pakistani are a potential target market, as comparatively this segment is economically sound and are touristy minded people being lived in foreign countries for longer time. More over these people have time also, when they come home on vacations. If this segment is rightly motivated and properly serviced, it could become the future's contributing tourists. There are 11 districts in Punjab, where the numbers of overseas Pakistani workers were over 100,000 in each and these places could be potential tourist generating areas. We may count as one person, one family and during 28 years of period, the number of workers proceeded abroad from these districts were as following,

Table 38

1	Rawal pindi	252,186
2	Gujrat	212,832
3	Fasilabad	122,190
4	Sialkot	205,551
5	Gujranwala	140,643
6	Lahore	198,247
7	Karachi	274.333
8	Dir	191.048
9	Sawat	150,767
10	Mardan	106,598
11	Peshawar	108,453

Source, OPF, Islamabad

6.5.7 Nature based Tourism Potential

Included in this segment are visits to the wilderness natural areas. Punjab has rich nature tourism resources and is classified in to , National Parks, Game Reserves, Wildlife Sanctuaries and natural wilderness areas.

6.5.7.1 National Park in Punjab

Table 39

S. No	Name	District
1	Chinji Reserved Forest	Chakwal
2	Lal Suhanra	Bhawalpur
3	Kala Chitta	Attock
4	Muree Kahuta & Kotli Sattian	Rawalpindi

6.5.7.2 Games Reserve in Punjab

Table 40

S. No	Name	District
1	Abbasia Reserve Forest	R. Y. Khan
2	Bajwat	Sialkot
3	Bhon Fazal	Guranwala
4	Border belt (5mile strip at Indo-Pak Border)	Gujrat, Sialkot, Lahore, Sheikhpura, Okara, Shiwal, Pakpattan, Bahawal pur, Bahawalnagar & R.Y.Khan

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5	Cholistan	Bhawalpur, R.Y. Khan, Bahawalnagar
6	Chopalia	Bahawalnagar
7	Dauluana	Jhang
8	Dilijabba / Domeli	Jehlum, Chakwal
9	Head Islaman	Vehari
10	Kathar	Rawalpindi
11	Rakh Kheri Murat	Attock
12	Kot Sabzal	Rajanpur
13	Nabi Shah Lake	Sargodah
14	Nammal Lake	Sargodah
15	Nammal Lake	Mianwali
16	Rahi Bunglow	Bahawalpur
17	Rasool Barrage	Gugrat, Jehlum
18	Thal	Muzaffar, Jhang
19	Ucchali Lake	Khushab
20	Kallar Kahar Lake	Chakwal
21	Tilla Jogian	Jhelum
22	Loi Bher Reserve Forest	Rawalpindi
23	Shuja Abad Canal	Khanewal

6.5.7.3 Wildlife Sanctuaries in Punjab

Table 41

S. No	Name	District
1	Bhawalpur Plantation	Bhawalpur
2	Baghat Reserve Forest	T,T Singh
3	Bhakkar Plantation	Bhakkar
4	Chak Plantation	Bhakkar
5	Chak Katora Reserve Forest	Bahawalpur
6	Changa Manga Plantation	Kasur
7	Chashma Barrage	Mianwali
8	Chichawatni Plantation	Sahiwal
9	Cholistan	Bhawalpur , Bahwal Nagar
10	Chhumbi Surla	Chalwal, Jhelum
11	Daman Reserve Forest	Rajanpur
12	Daphar Reserve Forest	Mandi Bahuddin
13	Depalpur Plantation	Okara
14	Fateh Major Plantation	Bhakkar
15	Harnoli Plantation	Mianwali
16	Head Qadribad	Gujranwala
17	Inayat Reserve Forest	Layyah
18	Jahalar Lake	Khushab
19	Jalalpur Sharif	Jhelum
20	Jauharabad Plantation	Khushab
21	Kamalia Plantation	T.T. Singh
22	Khabbeki Lake	Khushab
23	Khanewal Plantation	Khanewal
24	Kharar Kharal Lake	Okara
25	Kotla Issan Reserve Forest	Rajanpur
26	Khundian Plantation	Mianwali
27	Lal Suhanra Reserve Forest	Bahawalpur

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28	Machu Plantation	Layyah
29	Miranpur	Lodhran
30	Mithawana Tiwana Plantation	Khushab
31	Rajan Shah Plantation	Layyah
32	Rakh Ghulaman	Bhakkar

6.5.7.4 Wildlife Parks in Punjab

Table 42

S. No	Name	District
1	Attock Wildlife Park	Attock
2	Bhagat Wildlife Park	T.T. Singh
3	Bahawalnagar Wildlife Park	Bahawalnagar
4	D.G. Khan Wildlife Park	D.G.Khan
5	Jallo Wildlife Park	Lahore
6	Kamalia Wildlife Park	T.T. Singh
7	Muree Wildlife Park	Rawalpindi
8	Lohi Bher Wildlife Park	Rawalpindi
9	Pirowal Wildlife Park	Khanewal
10	Rahim Yar Wildlife Park	Rahim Yar Khan
11	Sulemanki Wildlife Park	Okara

6.5.7.5 Wildlife Breeding Centers in Punjab

Table 43

S. No	Name	District
1	Bhurban	Rawalpindi
2	Changamanga	Kasur
3	Gatwala	Fasilabad
4	Lawarence Pur	Rawalpindi
5	Lehri/ Mangla	Jhelum
6	Pirowal	Khanewal
7	Rawat	Rawalpindi
8	Sodhi	Khushab

6.5.7.6 Zoos in Punjab

Table 44

S. No	Name	District
1	Lahore Zoo	Lahore
2	Bahawalpur Zoo	Bahawalpur

6.5.7.7 Hatchery in Punjab

Table 45

S. No	Name	District
1	Saidpur Hatchery	Islamabad/ Rawalpindi

6.5.7.8 Forest Areas in Punjab

Table 46

S.No	Name	Area(Acrs)
1	Kundian	19274
2	Hamoli	2196
3	Joharabad	1210
4	Mitha Tiwana	2758
5	Pakhowl	1303
6	Daphar	7136
7	Bhakkar	5248
8	Fateh Major	3112
9	Rajan Shah	5214
10	Changa Manga	12510
11	Deosial	1173
12	Inyat	10405
13	Machu	10155
14	Shorkot	10079
15	Kamila	10864
16	Depalpur	7232
17	Chichwatni	11520
18	Arifwala	1575
19	Khanewal	11588
20	Khanpur	32872
21	Bahawalnagar	845
22	Chak Katora	1323
23	Miranpur	1843
24	Bet Mir Khizar Hayat	3614
25	Bakani	1998
26	China Malana	4180
27	Lal Sohanra	20974
28	Ali Pur	2295
29	Bahawalpur	1370
30	Shikarpur	895
31	Kotla Essan	5381
32	Dhaman	5607
33	Mitha Kot	1042
34	Abbasia	7079
35	Sahiwala	2967
36	Dhodian	10714
37	Qasimwala	5150
38	Walhar	4632
	Total	249333

7.0 SWOT Analysis

(Strengths, Weaknesses, Opportunities and Threats (SWOT) frame work)

Strengths

Tourism Resources, Punjab province has distinguished and rich tourism resources i.e natural conservation zones, natural recreation areas, cultural heritage sites, religious sites, adventure zones, deserts, wetlands, peculiar village life and famous world's oldest irrigation system; those all are great tourists' attractions and learning experiences for visitors.

Tourism Needs, Favorable climate, diverse water resources and strategic tourism locations connected with strong, Air, Rail and Road net works. Punjab highways and motorway linking to the major tourism areas are potential tourism promoting resources. Four International and four domestic air ports feed to the Punjab Province.

Land Use Planning, Governmental polices encourage implementation of environmental and conservation framework thus developing natural conservation areas to attract tourists in them. Strategic national programs, economic development polices, sustainable land use planning, decentralization and local government reforms are implemented.

Autonomy, Provincial Autonomy and abolishing of the concurrent legislative list have put the tourism sector in to the provincial domain as to develop their own strategy based on provincial tourism resources.

Conservation, Now public sector institutions are increasingly committed to using ecotourism as a tool for natural and cultural conservation and for economic growth. The protected areas and its management is playing a lead role in ecotourism development. Awakening awareness of eco tourism for nature conservation and subsequently financial support are there through GEF and or through donor agencies.

Infrastructure Growth, Government's focus on infrastructure growth has recurring impact on tourism development and consequently no new, major infrastructure and investments are required at macro levels on priority basis for tourism.

Eco- Tourism, NGOs role to use environmental and eco- tourism as a sustainable development tool for biodiversity conservation. They are promoting links between public and private sector to promote eco-tourism, particularly in small communities, where these relation ships are easier to build and promote eco-tourism.

Tourism Sector Strategy for Punjab

Policy, Provincial Government would allot state land for tourism projects on long lease basis and federal and evacuee lands where available, shall be similarly allotted. Land adjacent to Government rest houses would be leased out on nominal lease basis for constructions of resorts. (Existing tourism policy 1990)

Cost Saving Destination, Market trends indicate that tourism could be a successful developing sector of the national economy and of the Punjab. The province has the potential as cost saving vacationers destination by developing numbers of Provincial Government Rest Houses and Dak Bungalows lying redundant, or not in use.

Marketing Strength, The tourism in Punjab can be accomplished very effectively with publicity, advertising, and promotional efforts on media and electronic channels. Seven developed major districts are in Punjab having boundary with federal capital. Niche publicity and marketing channels can be used to promote Punjab tourism in other provinces.

Over Seas Pakistani, About 2 million, Pakistan Origin, Foreign National and Pakistani Work Force abroad, who visit home regularly, are potential future tourism services seekers in the Country.

Visa facilities, GoP has facilitated the national of twenty four countries on the Tourist Friendly list, with facility of visa issuance on arrival for group tourism through authorized tour operators.

Weaknesses

Information Management, Tourism resources information is weakly managed. It is largely unorganized and uncoordinated among public sector stake holders and non- interacted with private sector service providers, protected areas management, cultural sites managers and local governments.

Data Collection, There has been weak data base and puny efforts to capture profile of international or internal tourists' expectations i.e., practices, needs, and expenditures etc. Limited information is available and not any thing about eco-tourism and eco tourists which is an imminent, untapped tourism and predominantly tourism sector in the nature conservation zones of Punjab.

Coordination, Tourism awareness and promotions campaigns mostly depend upon mountain areas tourism and diversified products and destinations have not been promoted. Few tour operators are beginning to diversify their products packages to nature areas, but these attempts are poorly coordinated with the communities and other stake holders.

Tourism Sector Strategy for Punjab

Coordination, Institutions that could use eco tourism, a diversity of tourism, as a tool for rural development and conservation, tend to be inexperienced. Cooperation between eco-tourism stakeholders' agencies is at nascent stage. Mechanism for effective collaboration and cooperation among these agencies need support and reinforcement.

Tourism Disciplines, It has not been incorporated in educational system and in institutions. Even the tourism awareness campaigns are not organized in educational institutions.

Rural Areas, Tourism development does not need large scale infrastructure development, yet guidelines and investment packages that support local infrastructure development need to be established and associated with tourism. SME are completely lacking in rural areas. Efforts needed improvements to solid waste management, roads rehabilitation and basic visitors' infrastructure in protected areas and cultural sites.

Visitors Services, Visitors' services and quality assurance are underdeveloped and tourism information is badly managed and coordinated. There is no concept of tourism information management and information sharing between, users, providers and market places.

Financing, Scope of tourism financing is limited as private sector banks do not adequately fund these types of projects.

Tourism as Tool, Tourism development is not yet a development strategy or a conservation and business development tool. Its growth is presently just left to chance that too in some areas only, (rather than as a tool of government policy)

NGOS, NGOS have the awareness of tourism, but presently not playing any significant role in its development in the absence of government policy and guide lines in tourism development.

Tourism Entrepreneurs, Tourism internal and external market is not developed, where as this offers best opportunities for local entrepreneurs to develop and model the products. Collaboration between rural tourism resources owners and the urban service providers is non existence.

Image, Existed diversified tourism potential in Punjab and Pakistan has not been projected in domestic and international marketing campaigns. International markets suppliers have not been adequately informed about a national image of the country other than an adventure tourism destination. Regular participation in international trade fairs with proper focus on tourism resources and markets is neglected.

Law and Order, Over all law and order situation in the country and in the Punjab Province is deteriorating.

Industry Importance, In Provincial Government Policies, tourism segment has not been identified as a contributor to the economy, where as it is exploitable segment for same. The achievable target in economy contribution need to be fixed to realize the importance

Opportunities

Punjab tourism destinations have favorable opportunities those support the development and promotion of tourism in these areas.

Political Scenario, The overall socio economic conditions and new political scenario in the country after the eighteenth amendment in the constitution favors the development of tourism independently by the provinces.

NGOs, Government's programs support the development of small and medium size business. The role of NGOs in the country's social, economic, and political life has changed radically and NGOs are becoming real development partners with government. In last 8 years have witnessed consistent efforts to decentralize the state's role and responsibilities and delegate them to local government bodies.

Nature Tourism, International trends in tourism and its diversification reflect a higher level of interest. Nature tourism is gaining importance and is growing at annual average rate of 10-30% internationally, where as each district of Punjab is a fertile area for this segment of tourism.

VF&R , Pakistani origin foreign visitors, VF&R segment of the arriving tourists in Pakistan and proportionally in Punjab is on increase. These are potential targets for, as tourists to participate in various tourism activities in the Punjab and around whole country, provided high quality tourism services are offered to them. As a motivational step, this segment of visitors can be attracted in home as cost effective tourists' destination. International tourists' arrival in 2009 rose up to 854,000 in which 35% of the visitors, i.e. 298900 belong to VF&R category. This it self only, is a huge numbers and if, successfully brought in to tourism activities, may change the destiny of tourism scenario in Punjab.

Investments, Since this report recommends, development of small scale tourism projects, increased in numbers, may provide investment opportunities for local and Over Seas Pakistanis in tourism sectors.

Potential Markets, Close by Gulf and Middle East markets carry potential for in bound tourism in Punjab and in other areas for expatriates working there, local nationals and for Pakistanis living in those countries and Punjab could be an attractive tourists' destination for them.

Location, Punjab's location's, being in the center of the country is advantageous for easy excess from other provinces and is internationally connected through four air ports in the Province.

Tourism Diversified Sectors, International trend and support for the development of tourism and its diversification segments i.e. eco-tourism, village tourism, communities development are extremely favorable. UN/GEF, role in the development and management plans of protected areas in Pakistan is encouraging.

Rural Development, Funding, planning and provisions by World Bank and Asian Development Bank for poverty alleviation in the rural areas of Punjab may include the Eco-tourism development as part and potential source of poverty alleviation in the rural areas of Punjab.

Village Culture, Punjab's rural cultural, hospitalities and traditions are highly guest respected and its rural areas are extremely attractive places for visitors. Natural Conservation areas are unexplored, still untouched, totally save tourists spots and may be developed in to tourist sanctuaries, with private sector investments opportunities.

Birds Watching Tourism, Out of total seven identified migratory birds fly ways in the world, the migratory birds route number 4, commonly called the Indus Flyway, the major area of the route over the Indus river falls in Punjab and about 700.000 to 1,200.000 birds arrives in Pakistan through this fly way. These water fowl lands and over winter in the wetlands in Punjab i.e, at Chashma Barrage and its pond areas, Tansa Barrage and pond areas, Lakes in Soan Valley, Canals and Lagoons etc. This huge unique potential carries exploitable tourism opportunities of birds watching as an exclusive specialized segment and carries opportunities for private sector investments.

Co branding, Pakistan, being a member state of SAARC can also focus on, as co-branding its tourism resources with other member states.

High Cost for out bound Travel, Air fares in International Markets are increasing, due oil prices and levied of different kind of traveling taxes. This situation could reduced the number of Pakistani nationals traveling abroad for holidays , therefore opportunities to flourish domestic tourism are elevated, provided international tourism standards and best practices are maintained.

Threats

Political instability, law and order could become one of the major threats that can deter the tourism and this segment may further fall prey to the situation.

The global threats to tourism arising from international terrorism may create an uncertain future for the tourism industry as a whole and international travel may become unaffordable. This may cause to imposing additional taxes on airports and in the visiting countries for enhancing the tourists' securities.

Tourism Sector Strategy for Punjab

Oil's market up ward trend in international markets is serious threat to Aviation Industry and other related sectors, causing cost hikes in air fares resulting in to over all low travel profiles. Expensive tourism activities due to the factors will give rise to tough competition.

Lack of mitigation strategies to natural calamities

Part II

T0-BE SCENARIO

8.0 Tourism, Sustainable Development Tool

The tourism development leads to growth in varied segments, including culture preservation, biodiversity conservations and rural development. These segments directly address the improvement of livelihoods in rural communities and poverty alleviation in these areas and thus by tourism becoming the part of the local government planning, may be able to create scopes for sustainable alternate livelihoods in the under developed areas besides providing the visitors with culture and biodiversity education, pleasure in nature areas.

9.0 Strategic Objective and Priority Actions

The Punjab Tourism Strategy will adopt the approach and may engage the public and private sector right from the beginning. SMEs will be promoted and high profile projects may be deferred for minimum of 5 years, until the short and medium term strategy is successful and tourism is planted and flourishes as culture in the Province. Provincial and Local Governments should begin to reap the benefits of various segments of tourism when they incorporate these in to development plans and use it as a spatial planning tool. For example, including eco-tourism as a “positioning” strategy in protected areas management, and in natural conservation areas, should help planners to realize benefits to conservation, local employment, local business and destination development. Strategic objectives for tourism planning and development are grouped in to a four pronged strategy to develop a tourism cluster; 1) strengthen tourism marketing , 2) support product development , 3) develop human resources 4) provide an effective institutional and regulatory frame work . The major products of tourism, centered for cluster are accommodations, restaurants, foods, and transportation and tourists attractions. The expected results are expanded over the next 5 years period.

9.1 Punjab, Tourism Zones



9.2 Tourism Zones Formations

The Punjab province consists upon 36 districts. To achieve the goals and as explained in the part one of the report, the tourism development needs to be addressed through SMEs. The tourism infrastructure in each district has to be developed at local level in consents with the communities. How ever to develop a cluster, few districts have been grouped to form branded tourism zones for commercialization and tourists to have varieties of options for year round tourism activities and concentration in area could be avoided, thus tourism contributing in socio economic uplift of the rural areas of every district of Punjab and equally benefiting the urban areas. The following zones are formed.

- Zone 1, Attock, Rawalpindi, Chakwal
- Zone 2, Gujrat, Jehlum, Sargodha, Mandi Bahuddin
- Zone 3, Mianwali, Khushab, Bhakar, Leiah, Muzafarghar
- Zone 4, Sialkot, Gujranwala, Narowal
- Zone 5, Lahore, Sheikupara, Kusur, Okara, Nankana Sahib
- Zone 6, Fasilabad, Toba Tek Singh, Sahiwal, Khaniwal
- Zone 7, Multan , Vihari, Lodhran, Pakpattan
- Zone 8, Bahalpur, Bahawal Nagar, Rahim Yar Khan
- Zone 9, D.G. Khan, RajinPur
- Zone 10 Hafizabad, Chinot, Jahnag

The criterion to build up the zones is connected with their geographic position and the potential tourism resources in them. The DCOs may help to develop an inventory of the tourists' attractions and the resources, historical back grounds and infrastructures, security issues, hygienic conditions access etc for T&RDD. The TDCP, other public sector and private sector enterprises and entrepreneurs will market and promote tourists activities in these zones, distributing the tourist flow to all the areas avoiding pressure only on specific areas to conserve the tourism resources on which it depends.

10.0 Strategies Phases

The strategy document is based on 2 stages, Short Term and, Medium Term Strategy, consisting upon 5 years.

1-Short Term Strategy

The existing core market products will be focused to optimize tourists' resources and to continue to build on strength by bringing awareness. There is an advantage to capitalize on existing products as those are already introduced in the target market. The action plan time table is spread over a period of 1 to 5 years and the projects between one to three years fall in the category of short term and may be taken and completed during this phase of the study.

2- Medium Term Strategy

After having some stability and getting quantifiable returns in areas of concentration, the tourism in the province will be broadened by enhancing the range of products with comprehensive campaigns to open up new avenues. The action points falling in 5 years of span are considered here as in medium term strategy, however both will start simultaneously and at the end of short term, the continued projects will get strength from the completed projects.

11.0 The Action Planning Process

The Punjab Tourism Action Plan is directly derived from the findings in the first part of the strategy process, in meetings with public / private sector's stake holders and from consultant's own observations. The process was focused to develop strategy consisting upon smaller actions, shorter achievement period, less financial implication and resulting in sustainable development. This action plan is recommended to be implemented and spread over 5 years of period and is based on developing and promoting SMEs in tourism sector.

11.1 Assumptions, Coordination and Resources Realities

The formulation and subsequent implementation of Tourism Strategy is predicated on some basic assumptions, coordination and resource realities.

11.1.1 Assumptions

Formal Adoption, The prepared Tourism Strategy will be adopted as formal policy tools for guiding tourism development in Punjab at Provincial, District and Teshil levels.

Political Will, All the identified stake holders must be engaged in the process as willing partners. To succeed this tourism development agenda will need commitment and coordination among, local, regional and provincial governmental bodies.

Resources, There is sufficient demand, and sufficient local initiative and well defined tourism products and identified tourism resources. Government, donors NGOs and the private sector will need to collaborate in the identification and allocations of resources to make this action plan success.

Tourism Segmentation, Tourism is combination of different type of Tourist activities, and one, the eco tourism, a fast growing sector that strongly linked to the rural areas economy and social development will attract the attention of donor agencies for financial support.

11.1.2 Coordination and Resource Realities,

Several departments are directly involved in developing tourism and some have specific roles for its development. Coordination between these departments is essential. There is no specific Tourism Investments Fund, but amount is allocated to Tourism Department for capital investment projects in infrastructure improvement through ADP. Since many of the action plans are linked to other public sectors departments, therefore the funds for same may be utilized from allocations against those departments with the consensus and political will as tourism projects will be a tool for social development. It is expected the donor agencies will considerably support it too.

12.0 Themes Prioritization Criteria

A group of segments were identified to develop the thematic prioritization process, and out of them six segments mentioned in 11 were considered fundamentals to be adopted on priority to

achieve the goal and the objectives set in the strategy. The suggested action plans are coherent and are based on the following.

- a) The actions are inline with vision and the objectives.
- b) Institutions appear willing to join hands are identified.
- c) Potential source of funding and other to implement the action plan have been identified.
- d) The actions will support development in the rural areas and will expand tourism culture in the province with in five years.
- e) The actions are in consistence with the applicable tourism policy.
- f) The actions are realistic and doable and may be funded through ADP and Donor Agencies against rural development and economic growth initiative.

13.0 Priority Tourism Themes and Actions

Following six themes of macro-level issues have been identified for sustainable development of tourism sector in Punjab.

- 1- Information Management
- 2- Tourism Enterprise Development
- 3- Product Development and Quality Assurance
- 4- Marketing and Promotion.
- 5- Human Resource Development and Training.
- 6- Institutional Development

These tourism action themes are sub programs of the Tourism Action Plan. Each theme is supplemented by sets of the priority actions and each action suggested, in fact is a project, expected to support significantly sustainable development of tourism in Punjab.

Gap Analysis
The
Tourism Action Plan

11.1 Information Management

The consistence product development and marketing planning need extensive information on markets and tourism market trends. Primarily Federal MoT compiles tourism data on yearly basis in field of tourism, but the modality to these data is weak. In several field of operations, the information needs to be collected in time and to be compiled on regular basis, where as the present mechanism is slow and a lot of time is spent on collection and in compiling the information's. The creation of an accessible data base is fundamental for the success and implementation of the strategy. The availability of data and flow of information to the policy makers are the key factors. The following suggested actions may eventfully support the development agenda.

1. Innovate in tourism data collection system.
2. Create and implement Signage standards and system.
3. Create Tourism "Best Practice" Portal
4. Develop a Digital Library For Tourism Media Resources.
5. Develop Website of Potential Tourism Resources of each District.
6. Develop Marketing Decision Support System (MDSS)
7. Over Come the Fear Factor of Tourism in Pakistan.

Action 1 **Innovate in tourism data collection mechanism.**

Description

Acquiring information is prerequisite for any strategic planning process. Quantitative information of the tourism sector is required to get in to flow, while planning, implementing or in the monitoring phases. Needs analysis are to be identified in consultations with public and private sector stake holders. Innovation in current data collection mechanism will strengthen tourism development.

Rationale

In the last four decades, only four tourism surveys were conducted by Ministry of Tourism, 1976, 1982, 2000 and 2008. The data based on these surveys, does not reflect the required results and the immediate access to the current data is unmanageable in present scenario. Innovations in the data based mechanism are required i.e appropriate pre designed questioners, methodology, data presentation, keeping in view the local need and the information required by WTO.

Strategic Objective

-
- A) Strong data base.
 - B) Coordination among stake holders.

Anticipated Results

- A) Knowledge of Tourism Market Segments.
- B) Effective monitoring and direction of development proprieties.
- C) Identification of new tourism product development.
- D) Participative Planning Process.

Activities

- A) Discussions with Tourism Stakes Holders, for data requirements.
- B) Discussion with IT experts.
- C) Develop Software.

Lead Agency Partners

T&RRD/ TDCP/ MoT/Private Sector Stake Holders

Duration

1 year

Funding Source

ADP

Action 2 Create and implement Signage standards and system

Description

The creation and implementation of national standards for tourism signs to tourism attractions and sites based on internationally recognized symbols and color are necessarily required. Standardize the symbols and keys used for tourists' maps and marketing materials.

Rationale

The implementation of coherent, recognizable signs is an important tool in the development of the independent travel. Clear advance signs to attractions and instantly recognizable symbols of the different types of attractions to a variety of travelers are critical to the growth of the tourism

segment. Incorporation of the symbols into tourists marketing material, maps and guides will facilitate the development of tourist and itineraries and increase market awareness of product.

Strategic Objective

- A) Develop Tourism Cluster.
- B) Develop Guidelines for Visitors.
- C) Create Tourism Awareness.
- D) Plan improved access to the tourism opportunities.

Anticipated Results

- A) Increased Visitation and consequent visitors expenditures
- A) Increased numbers of self driven, self guided visitors.
- B) Profile of individual attractions strengthened by enabling them to promote themselves as part of a cluster.
- C) Increased awareness.

Activities

- A) Develop signage system.
- B) Consultations with tourism associations, site managers of attractions and in protected areas, with protected area managers.
- C) Provide guide line to incorporate signage system in districts and municipal development plans.
- D) Maintain standard and quality of signage presentation.

Lead Agency Partners

T&RRD, Forest, Wildlife and Fisheries Department, Road Agencies, Culture Heritage Department, Tourism Associations

Duration

1 year

Funding Source

ADP

Action 3

Create Tourism “Best Practice” Portal

Description

The portal of best practice is created to help and guide the tourism service providers and is helpful in the implementation of the strategy. The WTO codes of ethics are also important guide lines to strengthen the best practice portal.

Rationale

The lack of best tourism supportive practices has resulted in to sub standard services, with out code of ethics by service providers and code of conduct by users. The study of international best practices principals and adapted to the province’s tourism needs will significantly help in developing sustainable tourism and will rapidly compatible with the best international practices. This shall increase the awareness of tourism development strategies in tourism service providers.

Strategic Objective

- A) Improve Entrepreneurial Capacity and awareness of standards in local communities.
- B) Awareness of International Tourism Standards and capacity buildings for Public Sectors Tourism Managers and Private Sector Tourism Associations.
- C) Develop travel motivations among target markets.

Anticipated Results

- A) High Quality value added product and systems.
- B) A guiding vehicle to reeducation in financial and resources required for tourism development.
- C) Shorter time span for results.

Activities

- A) Create database structure.
- B) Collect Tourism related “best practice “materials.
- C) Place data on the provincial website.
- D) Meetings with the public/private sector stake holders.

Lead Agency Partners

T&RRD/ Public & Private Sector Tourism Associations/

Duration

1 year

Funding Source

ADP

Action 4 Develop a Digital Library for Tourism Media Resources

Description

To develop an electronic catalogue (Library) containing maps, photos, video clips and other important visual information for tourist sites and itineraries. The digital library should in addition meet the needs for advertising materials among agencies and organizations involved in tourism promotion and presentations. Tourism promotion efforts are made more successful when materials are available for agencies engaged in tourism promotion, marketing, and product development. This is a requirement for promotion of both the domestic and international tourism. The electronic library may also be used to support public tourism awareness efforts.

Rationale

Punjab tourism promotion efforts may bring best results, and are made more effective when back up promotional material is planned and arranged in advance for advertisements and awareness creating campaigns.

Strategic Objective

- A) Pre arranged advertisement and tourism awareness material.
- B) Achieve specified directional objectives of advertisements/ awareness campaigns.
- C) Orientation and Capacity building of Public/ Private Sector Stakeholders.
- D) Image building.

Anticipated Results

Maintained digital library, will help in developing the image of the province in and out side the country, and develop a tourism cluster.

Activities

- A) Create appropriate database structure; specify the guidelines on content and format of differing data types i.e photographs, product profile, consistent use of signs and symbols.
- B) Set line of direction to achieve objective in stakeholders meetings / consultations.
- C) Link digital library access to Tourism Associations and General Public.
- D) Regularly updating.

Lead Agency Partners

T&RRD / Tourism Organizations / Associations

Duration

1 year

Funding Source

ADP

Action 5 Develop Website of Tourism Resources of each District, e-tourism concept

Description

Develop a website or strengthen the existing Punjab portal, projecting Punjab Tourism Zones, comprehensively explaining the attractions and the facilities available in them for the visitors' awareness in side the country and for the tourists in international markets and opportunities to direct access to local service providers in those tourism resource generating areas.

Rationale

Over the years and by now, the information and communication technologies (ICT) have had a growing impact on tourism development, promotion, marketing and sales. More and more people now prefer to search for information on tourism destinations and offers on the internet.

Strategic Objective

- A) Connect service providers in less developed areas to the interested visitors.
- B) Comprehensive Information about the visiting destinations.
- C) Information access to the tour operators and other service providers.

Anticipated Results

- A) Increased visitations to less developed areas.
- B) Flow of urban economy to rural areas.
- C) Interaction between the societies

Activities

- A) Joint meeting with Public / Private sectors stake holders.
- B) Collection of Information to be placed on Website.
- C) Selection of Web developing company.

Lead Agency Partners

T&RRD / NGO

Duration

2 years

Funding Source

Donor Agency

Action 6 Develop Marketing Decision Support System (MDSS)

Description

The importance of information and efficient information management is steadily increasing due to the evolution of new technologies and high-capacity storage but also because now growing market dynamics are information needs. A marketing decision support system, MSSD can be of particular importance as it supports organization in collecting, storing, processing and disseminating information, and in the decision-making process by providing forecast and decision models (*Karl Wober, ISTM*).

Rationale

Operators in tourism management compared to other management sectors are confronted with a vast field of multipart aims, requiring different plans of action. The special working requirements of the services sector are a result of its business peculiarities. Problem in strategic and frequently operational planning, are characterized by their complexity, often being intermingled, non transparent, individualistically dynamic and requiring the achievement of multiple goals. The vast amount of information or complex weighting of the different sectors can present an insurmountable problem for human resources. As a result there are high expectations of decision-makers and trouble shooting abilities.

In order to solve complex problems, decision- makers need to have a factual knowledge of the industry (declarative knowledge) and the methodology used (procedural knowledge). (*Karl Wober, ISTM*).

Strategic Objective

- A) Tourism Organizations and other bodies of tourism, finding means of sharing and communicating information.
- B) Monitoring of Tourism Flow.
- C) On-line accessible decision support tool for tourism and hospitality management.

Anticipated Results

- A) Flow of information to Public / Private Sector Tourism Managers.
- B) New approaches to tourism marketing will be developed.

Activities

- A) Develop the clear concept of MDSS
- B) Form an IT / Marketing team to develop frame work.
- C) Discuss the agenda in Stake holders meetings and form committee.
- D)

Lead Agency Partners

T&RDD/ Tourism Associations/ NGOs

Duration

1 year

Funding Source

ADP

Action 7 Over Come the Fear Factors of Tourism in Pakistan

Description

After 1979, the sectarian intolerance, aftermath of soviet afghan war, the armed freedom struggle surfaced in Kashmir, the 9/11 event, and the US/ Afghanistan problem, these circumstances have all together exploded to acts of terrorism in Pakistan. These acts are done by few numbers of extremists and terrorists in some cities in the urban areas, but as whole there is no indication of large scale violence in the country. However the media coverage of the incidents has placed the country in to the situation, where the tourism as industry in Pakistan has been severely damaged and is in sharp decline.

Rationale

The adverse travel advisories and the negative propaganda in international media have practically put the tourism industry at halt in Pakistan. How ever, to dilute the effects and encounter these campaigns, a realistic approach based on facts need to be adopted jointly by private and public sectors. The interactions between major tourism associations, non governmental organizations and public sector support services departments need to be built up for a direction.

Strategic Objective

- A) Over Come the Fear Factors of Visiting Pakistan.
- B) Promote Transit Pakistan Campaigns.

Anticipated Results

- A) Revival of inbound tourism in Pakistan.
- B) Economic uplift.

Activities

- A) Arrange stakeholders meetings to develop the strategy.
- B) PATA/ PATO to develop e. marketing web site for encountering the effects on tourism industry in Pakistan of negative propaganda in international press.
- C) FAM Trips.
- D)

Lead Agency Partners

T&RDD/ Stake Holders/ Big NGOs

Duration

5 Years

Funding Source

TAAP/ PATO/ NGOs

13.1 Tourism Enterprise Development

One factor in the tourism business sustainability depends on the numbers of service providers and professional capacity of the tourism entrepreneurs and enterprises, in them, specifically at destinations ends. The easy excess to the service providers is vital for the sustainability. Small and medium enterprises,(SMEs) are the major vehicles for developing and providing direct tourism visitors' services, appropriate facilities and indirect support services. The size of the SMEs is expected to be remain small in foreseeable future in the present scenario; however these SMEs must be well managed to contribute in the tourism activities to support tourism economy significantly. The diversified tourism development and promotional strategy, expanding in all districts and with priority in rural areas shall give rise to the new small businesses start up to fill the gaps in services and facilities. The strategy support exploitation of the diversified tourism resources with particularly focused upon less developed areas in the province. With this approach, it is expected the economic activities to be increased and a number of businesses related with tourism will be benefited and flourished as whole but specifically in the rural areas of the province.

The following identified action will support the tourism entrepreneurs and tourism enterprises development.

1. Develop Tourism Enterprises through PPP inside the country for domestic tourism and out side for inbound International Tourism by offering TDCP franchise.
2. TDCP/ Daewoo or TDCP/ NATCO to develop a Transportation Tourism Infrastructure in the province.
3. Create Tourism Financial Incentive Mechanism.
4. Encourage Small Tourism Enterprises (Accommodation) Development.
5. Strengthen Private Sector, by offering Franchise of Punjab Tourism Enterprises in Hotels, Tour Operators and Handy Crafts Shops.
6. Investments pre feasibility reports in tourism sectors, principled on SMES be developed, for over seas Pakistanis in the rural areas.

Action 8 Develop Tourism Enterprises through PPP inside the country for domestic tourism and out side for inbound International Tourism by offering TDCP franchise.

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Description

In developing markets, the physical presence of the products representative is an edging strategy. The concept of the direct marketing is dominating phenomenon and very adequately address to sustainability approach. The direct marketing supports the quick expansion and sustainability of the product.

Rationale

As per performance indicators, the domestic tourism and tourism business in international market is increasing. To meet the tourists confidence, creating the tourism awareness of Punjab and strengthening the weak private sector, the adaptations and associations approach need to be build up. The one of the approach is the franchise affiliation in doing business that combines the entrepreneurs interest in keeping their own undertaking with that belongs to a group with well known brand which aims to expand on national and international market. A mechanism needs to be developed on need base.

Strategic Objective

- A) Encourage and facilitate growth and expansion of tourism in collaborations with private sectors.
 - B) Strengthen PPP
 - C) Reduce Public Sector Overheads.
 - D) Image building of the Province.
- .

Anticipated Results

- A) Awareness creation in national and international markets.
- B) Direct customers feed back.
- C) Increased flow of tourists.
- D) Targeted promotions of new Products, Eco-Tourism, Agro-eco tourism, Village tourism.
- E) Support to environment and bio diversity conservation and poverty alleviation

Activities

- A) Select right choices for PPP in national and international markets.
- B) Arrange product presentations for the interested enterprises in the both markets or to invite them in Punjab for physical product presentations.
- C) Negotiate with PIA for cooperation and assistance.
- D) Find prospective donors for financial support.

Lead Agency Partners

T&RRD/ TDCP/ PATO

Duration

2 Year

Funding Source

TDCP/ Donors

Action 9 Create Tourism Financial Incentive Mechanism.

Description

Create a package of financial incentives for new business start up and SME growth, including grant schemes, fiscal incentives, equipment leasing and credit guarantees. Package will be targeted at tourism business in underdeveloped areas with identifiable tourism potential.

Rationale

The start up costs and initial investment requirements for new and developing tourism business faces cash flow problem and will have severe strain particularly tourism business developers in rural areas. To encourage and stimulate the local tourism business entrepreneur in the area, mechanisms are necessarily to reduce startup/ initial investment costs, defer those over longer periods, and provide credit guarantees, including business licensing guarantees of tourism department.

Strategic Objective

Tourism Sector Strategy for Punjab

- a) Develop Clusters and Networks of supply chain by developing SME in tourism sector through public sector financial incentive mechanism
- b) Improve the Entrepreneurial Capacity in tourism business and train local communities in tourism services.
- c) Focus Tourism Development on Domestic Market as an initial priority.

Anticipated Results

- a) Increased tourism business entrepreneurs in tourism sector.
- b) Increased investment in tourism sector.
- c) Increased local employment.
- d) Increased tax revenue in medium and long term.

Activities

- a) Identify scope of PSIC contribution in financial incentive mechanism.
- b) Involvement of district government and provision of funds on district level.
- c) Identify financial support mechanism through public/private sector stakeholders.
- d) Identify and support equipment leasing schemes.
- e) Develop tourism business supportive packages.

Lead Agency Partners

T&RDD / PSIC / NGO

Duration

5Years

Funding Source

Donor Agency

Action 10 Encourage Small Tourism Enterprises (Accommodation) Development.

Description

Develop and operate a program to connect small hotels and other accommodations facilities in less developed areas with tourism sites, events, festivals, tours, and related activities of interest to national and international tourists. The action would bench mark and adapt the Small Tourism Enterprises Program in the all districts of Punjab to up lift the socio-economic condition of the communities

Rationale

Small hotels and other accommodation facilities in less developed areas may be linked up with the tourism attractions in the surroundings to assist and promote small tourism enterprises.

Strategic Objective

- a) Develop Clusters and Networks of supply chain by developing SME in tourism sector;
- b) Improve the Entrepreneurial Capacity in tourism business and train local communities in tourism services.
- c) Facilitate the development of effective small and medium tourism enterprises

Anticipated Results

- a) Development of tourism packages and organized marketing.
- b) Strengthened SMEs in tourism sector.
- c) Socio-economic uplift of the less developed areas

Activities

- a) Need assessment for small tourism enterprises (sites, attractions, community tourism).
- b) Operational Guidelines for smaller accommodation enterprises.
- c) Occupational standards for small hotels.
- d) Design environmental management program (i.e. waste, energy, water etc)
- e) Volunteer programs and partnerships, students from hospitality services training provider institutions may volunteers for providing methodological guidance.

Lead Agency Partners

T&RRD/ District Government/ Municipalities/ Private sector/ PATO

Duration

5 YEARS

Funding Source

Donors/ Hospitality Service Associations/ Private Business

Action 11 Strengthen Private Sector Tourism Enterprises by offering Franchise of TDCP to Hotels, Tour Operators and Handy Crafts Shops.

Description

The scope of developing and promoting tourism in 36 districts consisting on, 10 tourism zones is a possible challenging task and need numbers of tourism promoting out lets. The foregoing strategy suggest to develop the approach of partner ship with the private sectors, there fore, offering franchise to suitable enterprises will be a logical choice to strengthen tourism.

Rationale

The huge tourism potential lie in Punjab and to exploit this potential, the resources with public sector is very limited. Therefore a partnership with private is must to tap the potential with in the specific time frame.

Strategic Objective

- a) Public/ Private Sector Partnership to be developed.
- b) Reflect Governmental interest in tourism promotion.
- c) Business support by Government to Private Sector.
- d) Monitoring of code of ethic in tourism business.

Anticipated Results

- a) Developed, private sector interest in tourism business.
- b) Tourists' confidence in tourism offers.
- c) Tourism Awareness Creation.
- d) Increase in Government revenues.

Activities

- a) Plan to be developed for establishing sales out let in each district.
- b) Assess the existing infrastructure, of Hotel, Tour Operators and Handi Craft Shops.
- c) Select partners for the Franchise.

Lead Agency Partners

T&RDD/ Private Sector/ District Governments

Duration

3 Years

Funding Source

ADP/ TDCP

Action 12 Develop Short Pre-feasibility reports in tourism sector attracting over seas Pakistanis to invest in Opportunities in Tourism Enterprise Development (SMEs) in areas of choice.

Description

Pre-feasibility studies are researched reports that facilitate potential entrepreneurs in project identification for investments. These reports invite attention of the investors and provide information about investment opportunities. To fill up the existing gaps, the preparation of small pre feasibilities reports in the tourism related ventures i.e, services and in infrastructure, will motivate the over seas Pakistanis for investments at back home, particularly those, who are involved in hospitality business .

Rational

Punjab has 36 districts. All the districts have tourism resources and untapped potential, particularly in smaller towns and in rural areas. These huge potential is tapable through investments in development of SMEs in tourism sector in all the districts.

Strategic Objectives

-
- a) Information for investment opportunities in tourism business.
 - b) Development of tourism infrastructure on massive scales.
 - c) Multiple opportunities of tourism activities.
 - d) Socio-economic uplift of undeveloped districts/ areas.

Anticipated Results

- a) Developed tourism infrastructure in the Province.
- b) Well created awareness of the tourism.
- c) Socio-economic uplift of the areas.
- d) Flow of foreign exchange in the Province.

Activities

- a) Provide guide lines to development partners.
- b) Initial survey of the districts/areas for the purpose, involving district governments in the process.
- c) Agenda to be discussed among Public/ Private Sector Stakeholders.

Lead Agency/ Partners

T&RDD/SAMEDA/ OPF

Duration

5 Years

Funding

SAMEDA/OPF

11.2 Product Development and Quality Assurance

Punjab has diverse tourism resources that lead to a chain of multiple tourism activities. Seven kinds of tourism resources exist in the Punjab province giving it a competitive advantage over the other provinces. These resources need to be developed, mobilized, protected and managed for the well being of the communities living around these resource generating areas for sustainable tourism, assuring quality experience to all visitors.

1. Develop Mining and Mineral Resource as Tourism Product
2. Develop eco-tourism in protected areas
3. Develop Agro eco Tourism Concepts in Villages
4. Developed Linkage of Religious Pilgrimage to Cultural and Heritage
5. Focus on Developing Desert Tourism Product
6. Develop Adventure Tourism
7. Strengthen Cultural Events and Traditional Celebrations
8. Structure Groups of Products in Tourism Zones and Develop Cluster

9. Develop Punjab Handicrafts as tourism Product
10. Develop sets of tour itineraries to access product Regions.
11. Plan and Develop Protected Areas Rest Houses/ Dak Bungalow System
12. Develop and provide affordable access to available accommodation establishments & rooms in Punjab (Public Sector) on priority.

Action 14 Develop Mining and Mineral Resource as Tourism Product

Description

Numerous mining operations in Punjab are in the areas that have substantial tourism potential. The primary attractions are, natural environment, heritages sites, wilderness areas, landscapes and mines themselves, those are in some case high potential tourists attractions. Aboriginal land and land management regimes, sites and cultural knowledge all are considered potential tourism product. Few more sites other than Khewara mines need to be identified and developed and converted into tourism resorts.

Rational

Province of Punjab is blessed with substantial mineral resources of coal, rock salt, gypsum, bauxite, dolomite, fuller's earth, bentonite, silica sand, fireclay and iron ore. Mining and mineral are great learning experience for visitors and tourism attractions. The developing interest of the domestic and foreign tourist in this potential resource has been increased in the years. The visitors' numbers at Khewra salt mines in the year 2002-2003, those were 68,124 has gradually, now been increased to 238,567 in 2009-2010 and is expected to grow further.

Strategic Objectives

- a) Tourism Culture in the Province to grow.
- b) Interaction between rural and urban communities to be developed.
- c) Socio-economic uplift of the communities in the vicinity of the tourists' attractions.

Anticipated Results

- a) Foreign tourists from the gulf and Saudi Arabian region will get attracted.
- b) Provincial tourism will be enhanced.
- c) College and Schools will take more trips for their students.
- d) Socio-economic uplift of the communities.

Activities

- a) Concept to be discussed among T&RDD/ Mines and Mineral Department/ Punjab Mineral Development Corporation.
- b) Feed back from Public and Private Sector Stake Holders.
- c) Search Potential Investment Partners.

Lead Agency/ Partners

T&RDD/ Mines & Mineral Department/ PUNJUM/ Private Sector

Duration

5 Years

Funding

PPP

Action 14

Develop eco-tourism in Protected Areas

Description

4 National Parks, 23 Game Reserves, 32 Wild life Sanctuaries, 249333 acres of forest area, carry huge eco tourism potential in Punjab and is manageable by strengthening and forming CBOs.

Rational

There has been growth world wide in visits to natural areas, particularly in developing countries. Many economic development professionals increasingly have viewed natural-area visitation as a tool for providing employment in regions that have experienced decline, or lack of development, in other industries. The visitation to natural areas by tourists to see the nature environment contribute in the socio-economic development of communities living round these resources, thus encourage communities to conserve those natural resources on which the tourism depends.

Strategic Objectives

- a) Nature Conservations.
- b) Socio-uplift of the communities by developing tourism.
- c) Providing Multiple Opportunities of tourism.
- d) Positive Behavioral Change in Society.
- e) Development of Tourism Culture.

Anticipated Results

- a) Communities Participation in Government's nature conservation efforts.
- b) Socio-economic uplift of the communities.
- c) Improved harmony and tolerance in the society.
- d) Development of tourism culture in the Province.

Activities

- a) Identify Potential areas and survey existing infrastructure.
- b) Develop CBOs.
- c) Concept development meeting with Forestry, Wildlife and Fisheries Department.
- d) Development of tour itineraries.
- e) Develop Work Plan

Lead Agency/ Partners

T&RDD/ FW&FD

Duration

5Years

Funding

FW&FD/ Donor Agency

Action 15 Develop Agro-eco Tourism Concept in Village areas, Service Providers and in Visitors.

Description

A net of irrigation canals has developed the plains of Punjab a fertile agriculture regions. Agriculture being the nature tourism component can be exploited for the tourist to visit rural areas to do agriculture forming activities in traditional village culture and atmosphere.

Agro Tourism is when a native person or local of the area offers tours to their Agriculture Farm to allow a person to view them growing, harvesting, and processing locally grown foods, sugar cane, corn, or any produce the person would not encounter in their home country. Often the farmers would provide a home-stay opportunity and education. In general, Agri-Tourism is the practice of attracting travelers or visitors to an area or areas used primarily for agricultural purposes. For instance, farm tours, bed and breakfasts, Tractor / bullock card rides, grapes, mangoes, and other horticulture farms, by product farms, birds / animal zoos, and many other activities may be operated with little additional investment in labor.

Rational

Punjab plains are fertile agriculture and natural zones and are suitable for development of agro-eco tourism. This resource is new in the native market but is an old and successful tourism activity in developing agriculture countries.

Strategic Objectives

- a) Awareness of the agro-eco tourism in service providers and visitors.
- b) Frequents visits of tourists from Urban to rural areas.
- c) Visits of tourists form Gulf and Saudi Arabian Regions.
- d) Socio-economic uplift of the communities.
- e) Social harmony

Anticipated Results

- a) Multiple choices for tourism in Punjab.
- b) Social development in the Province.
- c) Learning experience of village and rural life.
- d) People to people contact

Activities

- a) Concept to be discussed among public/ private sector stake holders.
- b) Pilot Project to be identified and advertised.
- c) Primarily Gulf area to be focused.

Lead Agency/ Partners

T&RRD/ Agriculture Department/ NGO/ TDCP

Duration

5 Years

Funding

Donor Agency

Action 17 Develop Linkages of Domestic and Foreign Religious Pilgrims to Cultural and Heritage Sites.

Description

Numerous Holy Shrines in urban areas are in the close vicinity of Archeological, Cultural and Heritage Sites. To link up religious pilgrims from rural areas to recreational, educational and historical places in urban areas will support filling gaps between societies and generations and will develop harmony among them.

Rational

Building upon tourism for all concepts, the people visiting from rural areas to holy shrines in urban areas, may be facilitated to tour the archeological and historical sites around, and in the city. The foreign visitors to their holy shrines may also be facilitated to visit tourism attraction around.

Strategic Objectives

- a) Strengthened tourism culture.
- b) Learning Experience for rural areas people.
- c) Social Development.
- d) City Exposure.

Anticipated Results

- a) Increased number of person visiting tourists sites.
- b) Improved economic activities.
- c) Social harmony.
- d) More business opportunities

Activities

- a) Concept to discussed among Public / Private sector Stake Holders
- b) District wise Potential Holy Shrines to be identified.
- c) TIC to be established and equipped near Muslim/ Non Muslim Holy Shrines.

Lead Agency/ Partners

- a) T&RDD/ TDCP/ Auqaf, Religious and Minorities Affairs Dept

Duration

5 Years

Funding

Auqaf, Religious and Minorities Affairs Dept/ T& RDD

Action 18 Focus on Developing Desert Tourism Product

Description

There are two potential desert regions in Punjab, Cholistan and the Thal Deserts. Cholistan region is known and is in the limelight of tourism. Few annual events are promoted there, mainly the local Jeep Rally and some festivals and camel safaris during that period. The Jeep Rally is a well promoted yearly event in Cholistan Desert since 2005 by TDCP. This event attracts participants from all over the country.

The Thal desert is isolated from tourism. The desert is situated mainly in the area between the Jehlum and the Sind rivers near the Pothorhar Plateau. Its total length from north to south is 300 km and the breadth is 110 km. The desert area is divided into District of Bhakkar, Khushab, Mianwali, Jhang, Layyah, and Muzaffargarh and the main town in Thal desert are Thal, Roda,

Mankera, Hayderabad Thal, Dullewala, Mehmood Saheed, Shah Wala, Shahi Shumalai, Piplan, Kundiyan, Koat Azam, Saraay Muhajir, Jiasal, Rangpur, Aadhi Koat, Jandan Wala, Mari Shah Sakhira, Noor PurThal, and Muzafagarh. One third of the land is sandy of which small portion is irrigated by Thal canal. Rest of the sandy land is cultivated and entirely dependent upon rains. People mostly depend on agriculture which is highly dependent on rain falls. As such people are poor, backward and traditional.

Rational

Both desert areas are potential tourism resources and carry immense opportunities for developing Punjab Desert Tourism Product.

Strategic Objectives

- a) Tourists frequent visits to desert areas.
- b) Socio-economic uplift of the rural areas communities.
- c) Social interaction between urban and rural communities.
- d) Learning experience by tourists.

Anticipated Results

- a) Social Harmony
- b) Increasing number of tourists visiting the sites.
- c)

Activities

- a) Concept to be discussed among Public/ Private sector stakeholders.
- b) CBO,s to be established in regions for developing tourism infrastructure.
- c) Survey to be conducted of the regions to promote type of tourism events and develop itinerates.
- d) Cholistan Jeep Rally may be converted in to Regional Event, and participants from Gulf region may also be involved in the Rally.

Lead Agency/ Partners

T& RDD/ Bahawalpur Dev Authority/ Thal Dev Authority/ Dist Govts

Duration

5 Years

Funding

ADP/ BDA/ TDA

Action 18 Develop Adventure Tourism

Description

Adventure tourism makes the tourism industry more diversified. Pakistan is known as a glorified and popular adventure tourism destination. Its northern part and the mountainous regions are valuable tourism selling destinations. Adventure tourism attractions in Punjab are not well aware among tourism sellers, service providers and tourists, and need exploration, development and marketing

Rational

Two big deserts, districts along Indus River and salt range area carry potential for development and promotion of adventure tourism. Those include, river trekking, trekking along canals, water rafting, Para gliding, gliding, hunting, ballooning, animal safaris.

Strategic Objectives

- a) Tourism for all in Punjab
- b) Attract Foreign Tourists.
- c) Develop Local Adventure tourists.
- d)

Anticipated Results

- a) Strengthened Tourism economy.
- b) Economic uplift of the Resource providing areas.
- c) Social Development.

Activities

- a) Concept to be developed among Public / Private sector stake holders
- b) Areas to be identified for adventure tourism activities.
- c) Itineraries to be developed.
- d) Required Facilities/ Infrastructure to be identified

Lead Agency/ Partners

T&RDD/ Irrigation & Power Department/ NGOs/ Adventure Promoter Associations

Duration

5 Years

Funding

Donor Agency

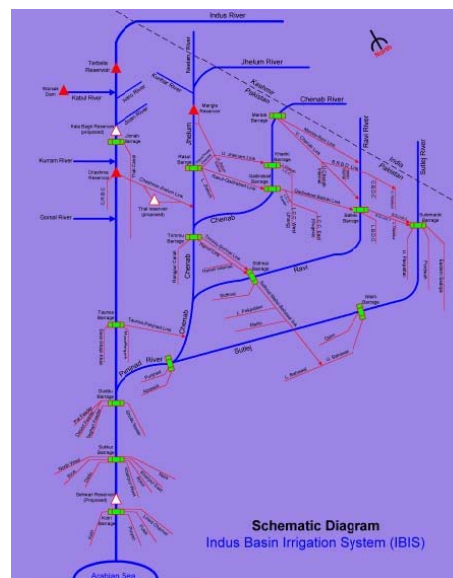
Action 19 Develop Irrigation Canals as Tourist Spots

Description

The irrigation canals out of unique Indus basin irrigation system in Punjab are ideal spots for tourism attractions. These canals are eco tourism hot spots and learning sites of history, design, culture impact, changes the canals had on the surrounding landscape.

Rational

Canals tourism resource consist upon world known Indus Basin Irrigation System, where a net work comprises of three major reservoir, 16 barrages, 2 head works, 2 siphons across major rivers, 12 inter river link canals, 44 canal systems (**23 in Punjab**, 14 in Sind, 5 in NWFP, 2 in Balochistan and more than 107,000 water courses. The aggregate length of the Canals is about 56,073 Km. In additions, the watercourses, farm channels and field ditches cover another total 1.6 million Km. These area consists upon number of eco zones and habitat of different kind of unique species and biodiversity. Through this resource the tremendous potential exists to access and develop village/rural tourism/ eco-tourism/agro eco-tourism.



Strategic Objectives

- a) Socio-economic uplift of the poor communities.
- b) Tourism awareness.
- c) Interaction among societies.
- d) Nature Conservation.

Anticipated Results

- a) Increased Tourism Visitors.
- b) Foreign Tourists attractions.
- c) Learning experience.

Activities

- a) Action point to be shared with Public / Private sector Stakeholders.
- b) Develop inventory of rest houses/ dak bungalows along canals and allow tourists to avail facilities.
- c) Develop lacking tourists' facilities in rest houses/ dak bungalows.
- d) Involve local communities in the arrangements.
- e) Create awareness among tourists and service providers.
- f) Develop code of conduct/ ethic for service providers and seekers in natural area visitation.
- g) Keep tourism infrastructure development in natural area as matching to the natural environment and prescribed rules for protected area development,

Lead Agency/ Partners

T&RDD/ Irrigation Department/ Home Department/

Duration

3Years

Funding

Donor Agency/ NGO

Action 20 Strengthen Cultural Events and Traditional Celebrations in Tourism Zones and Districts.

Description

Local culture provides a sense of identity for rural communities and residents. This identity facilitates common understandings, traditions, and values, all central to the identification of plans of action to improve well-being. Culture events contribute to building a sense of local identity and solidarity. It influences the confidence rural communities have for coming together to address specific needs and problems. This local commitment among residents, regardless of economic or political conditions, can serve as a valuable tool in shaping the effectiveness of development options and local actions. Such commitment, based on culture and common identity, can be seen as a potentially important tool in development, and social improvement efforts.

Rational

To develop the social harmony among the people living in the tourism zones and to connect them with the urban populations, promotion of cultural events and traditional celebrations in tourism zones and districts are significant segments. Such regular celebrated events become the brand and the visiting foreign tourists to such events add to the values and play economic development role.

Strategic Objectives

- a) Tourism Culture to be developed.
- b) Social Development.
- c) Economic Development.
- d) Preservation of intangible cultural.

Anticipated Results

- a) Frequent gathering of the local people.
- b) Economic activities.
- c) Trade Promotions.

Activities

- a) Develop village, teshil, and district, zone wise inventory of events and to group them.
- b) Identify the celebration sites and develop them.
- c) Concept to be wet with Public/ Private Sector Stakeholders.
- d) Village, Teshil, District and Zone level TDCP office of Franchisee to organize such events in coordination with local governments.

Lead Agency/ Partners

T&RDD/ Local Governments/ Chamber of Commerce/ NGO

Duration

5 Years

Funding

ADP/ Donor Agency/ Chamber of Commerce

Action 21 Develop Groups of Products in identified Tourism Zones to form Tourism Cluster

Description

Ten tourism zones have been identified in Punjab. Inventories of tourism assets in each teshil and district of the zones should be prepared to brand the zones with tourism attractions for destination marketing and to generate total tourism experience.

Rational

The interaction of the consumption of the tourism product with its local base is one of the main characteristic of the activity, showing the fundamental role the tourism cluster plays in the strategies for local development. In most economic activities it is the product that reaches the customer, but in tourism it is the opposite. The consumer seeks for tourism services. Because of this characteristic tourism has a high impact on local development. From this perspective tourism and local development are interconnected because they take place if the regional socio-cultural and environmental characteristics are respected where the activity takes place.

Strategic Objectives

- a) Develop tourism cluster.
- b) Visits in Tourism Zones.
- c) Social Development.
- d) Multiple Choices for Tourists.

Anticipated Results

- a) Number of tourists will be increased.
- b) Economic Activities will be increased.
- c) Competition among tourism zones, will lead to Product Development and Quality assurance.

Activities

- a) Action point to be shared with public/ private sector stake holders.
- b) Inventories of tourism assess of each zones to be prepared and group them to develop a tourism cluster.
- c) Asses' tourism infrastructure in each zone.

Lead Agency/ Partners

T&RDD/ Local Government/ NGO/ CBOs/ Public Sector Stake Holders

Duration

5 Years

Funding

ADP/ Dist Govts/ Donor Agency

Action 22 Develop Punjab Handicrafts as Tourism Product

Description

Punjab has varieties of handicrafts. These handicrafts are a part of tourism cluster and the crafts consist upon as under.

- Wooden Handicrafts those include, wooden carving, wood lacquer, and wood inlay.
- Metal Handicrafts, those include major art works, cut work, chiseling, embossing, surface treatment, and castings.
- Blue Pottery, include special hand painted pottery.
- Carpets, silk and woolen, includes carpets, rugs and duree.
- Textile, include embroidery work, shawls, gabba and cushions.
- Mirror work, include lacquer work and paint work.
- Paper Mchie, Camal skin and Bones product

Wooden handicrafts, are made in Chinoit, Metal Handicrafts in Kot Abdul Malik, near Lahore, Bule Pottery in Multan and Bones Product in Multan and Lahore

Rational

Handicrafts are an integral part of the tourism experience for tourists. The sale of handicrafts to tourists can foster the continuity of local traditions and contribute significantly to poverty alleviation, through its ability to create jobs, socio-economic opportunities, and an enhanced quality of life in local communities. The handicraft industry has a capacity to create high added value. Money spent on crafts spreads instantly and undiluted in to the local communities.

Strategic Objectives

- a) Tourism Cluster formation.
- b) Value added tourism.
- c) Economic Development

Anticipated Results

- a) Increased number of visitation.
- b) Handicrafts Selling.
- c) Made in Pakistan Promotion

Activities

- a) Share the action point with PSIC.
- b) Identify the handicrafts making areas.
- c) Conduct joint, Tourism/ Punjab Handicrafts exhibitions.
- d) Each sales out to be used for promotional activities.
- e) Entrepreneurs to be offered TDCP/ PSIC franchises.

Lead Agency/ Partners

T&RDD/TDCP/PSIC/ Local Government

Duration

3 Years

Funding

T&RDD/TDCP/PSIC

Action 23 Develop sets of tour itineraries to access Product Regions.

Description

Tourists access to amazing destinations and fascinating venues i.e historic cities, forts, heritage destinations, cultural attractions, pilgrimage sites, visits to wildlife sanctuaries are generally through well prepared tour itineraries. In fact a travel or tour itinerary is an advance information or list of activities, what a tourist is being offered to enjoy with. Tour itineraries help save time, stress and money. They also ensure that by following a worked out plan the tourists never miss out visits to interested places.

Rational

Professionally prepared tour itineraries covering on contingency plans, customer needs and expectations, desk research, geographical area, key features and components, resources, sites, suppliers, SWOT of tour routes, tour types will be great strength to product development.

Strategic Objectives

- a) Awareness creation.
- b) Quality Assured Services.
- c) Advance information of tourists in visiting areas.

Anticipated Results

- a) Increased visits.
- b) Local tourism entrepreneurs' participation.
- c) Economic activities.

Activities

- a) Formation of itineraries development team in TDCP.
- b) Private Sector Tour Operators to be taken on FAM trips with TDCP team to visit and survey the sites.
- c) Share the itineraries route with the District Governments.
- d) Printing/ Advertisement of Tour itineraries

Lead Agency/ Partners

T& RDD /TDCP/ Private Sector Tour Operators

Duration

Two Years

Funding

TDCP/ Sponsors Ship/ Advertisement

Action 24 Develop Rest Houses/ Dak Bungalows Infrastructure in Protected Areas

Description

Quite many rest houses and dak bungalows are accessible in the protected areas and among them some have importance of being century old. These type of accommodations are tourism assets and be linked to the tourism activities. Mostly such accommodations are abandoned and may be put back in to useable conditions for value addition in Punjab Tourism.

Rational

Low cost, comfortable accommodation facilities play an important role in popularizing tourists' destinations. Therefore, plan and develop a chain of rest houses/ dak bungalows located in protected areas and or, in close vicinity of natural areas, for public tourism access. The chain need to be linked through standard reservation system by developing a net working mechanism.

Strategic Objectives

- a) Nature Conservation.
- b) Socio- economic development.
- c) Environmental awareness.

Anticipated Results

- a) Visitations to natural areas.
- b) Increased economic activities.
- c) Employment generation.

Activities

- a) Action point to be shared with the public/ private sector stake holder.
- b) Prepare inventory of useable/ unusable rest houses/ dak bungalows in protected areas.
- c) Develop the accommodation.
- d) Develop the legal mechanism to use accommodation by tourists.
- e) Develop a central reservation system to book accommodation by tourists and publicized.

Lead Agency/ Partners

T& RDD/ TDCP/ Irrigation and Power Dept/ Forest and Wildlife Dept/ PATO

Duration

2 Years

Funding

PPP

13.2 Marketing and Promotion

It is important to determine that how Punjab can position itself in domestic as well as in foreign markets, in a way that highlights its tourism strength emphasizing its branded products. Many stake holders agree that on regional portico the Punjab tourism products to be linked with the tourism attractions offered by the surroundings markets predominantly by Gulf and Saudi Arabian regions. This would offer tourists a broader mix of markets and products of Arabian regions and of Punjab's tourism attractions. The linkage between Gulf and Saudi tour operators are significantly important. Competitive advantage to Punjab of its nature and cultural based tourism in domestic and regional markets is of significant value.

1. Develop Joint Venture between TDCP and Punjab Education Foundation for Introducing Tourism Awareness Programs from class 6th to class 10th, as pilot project
2. Develop Joint Venture between PIA/ HOTEL/ TDCP or Private Sector to promote Punjab as Cheap and valued destination for International tourists as Public/Private Funding Partnership.
- 3 Promote Annual Punjab Tourism & Handicrafts Exhibition Inviting Tour Operators from Gulf and Saudi Arabian Regions.
4. Plan Quarterly joint seminars/ exhibitions in collaboration TDCP/ PSIC in Rawalpindi, Lahore, Multan and Monthly Programs in others districts providing opportunities for rural areas communities to participate.
5. Develop, Encourage and sponsor Cultural Events.
6. Do Strengthening, Relocation and New Opening of New TICs.
7. TDCP / Private Sector/Daewoo Pakistan Motorway Service to establish TICs along M2 Motorway in the developed Service Areas and on Major Highways at Potential Spots (Service Areas) to Create Tourism Awareness and Promote rural tourism/ Village tourism in surrounding from these points (PPP).
8. Develop Tourism Products Niche Marketing Strategy.
9. Assist Tourism Products and Services Market Development.
10. Promote Tourism Market Diversification.
11. Participate in SAARC, and Gulf Area Tourism Marts

Action 25 Develop Joint Venture/ MoU between TDCP and Punjab Education Foundation for Introducing Tourism Awareness Programs from class 6th to class 10th, as pilot project

Description

In 29 districts of Punjab, the selected private sector schools are running in joint venture program with Punjab Education Foundation through PPP approach. The foundation under its PEF-FAS program finance the targets school up to maximum of Rs 350 per month per child for elementary classes and Rs 400 for secondary classes as tuition fee and related/ allied charges to encourage and promote access and improve the quality of education.

The necessity of creating tourism awareness in youths has now been greatly realized for tourism sustainability and many developing countries have launched such programs in schools.

Rational

Punjab Education Foundation's financial support to the schools in twenty nine districts, including in rural areas, provide opportunities for developing organized tourism awareness programs in youth and asking school management to include tourism as a curriculum in the teaching timetable. This could be, twice weekly periods in classes from 6th to 10th. The initial program shall include talks, slides shows, tourism videos presentations, and tourism documentaries to develop interest and improve tourism knowledge in children and gradually enhanced the programs to the excursion trips to tourism sites in their towns, cities, districts and in provinces.

Strategic Objectives

- a) Sustainable tourism.
- b) Attachment with native places.
- c) Social Development.

Anticipated Results

- a) Youth's involvement in healthy activities.
- b) Youth's awareness about native tourism's resources.
- c) Better representation by youth on foreign forums.

Activities

- a) Discuss the action point agenda with stakeholders.

Tourism Sector Strategy for Punjab

- b) Appointment of a Tourist Guide in each school/ Or provide training to one teaching staff of the school to act as tourist guide.
- c) Develop a comprehensive curriculum for class rooms' tourism presentation.

Lead Agency/ Partners

T&RDD/TDCP/PEF

Duration

5Years

Funding

Govt of Punjab/ Donor Agency

Action 26 Develop MoU/ Joint Venture between PIA/ HOTELS/ TDCP or Private Sector to promote Punjab as Cheap and valued destination for International tourists as Public/Private Funding Partnership.

Description

Inbound international tourism in Punjab and in Pakistan with gradual decrease is now almost static and is expected to be worsening if some revival efforts, measures and risks are not taken by the stakeholders themselves. The strategic approach that will help in understanding and appreciating the capabilities of, the Air Transport Companies, the Hotel Business and Tour Operating Companies, and what they ought to do, in order to contribute meaningfully to the revival of the tourism industry in Pakistan is to develop Private Funding Partnership among themselves, as part of the Short Term Emergency Recovery Program (STERP) and may even stretched beyond to overlap with the medium term plan. The National Air Line and the Hotel Industry in Punjab have a vital role to play in the revival activities. The lowering of cost is a necessary precondition for any effort to start with and than develop into a diversified tourism export base in the country and more specifically in Punjab. As an experimental initiative, all the three major stakeholders join hands to lower the cost of the destinations through package tours raising the tourists' motivational level to undertake tourism journeys to Punjab. The expected contribution from the partners is as following.

Rational

Besides establishing appropriate bodies and practicable mechanisms to translate the idea into action, the partners involved should refrain from using this arrangement as targets for revenues but only as an approach to support sinking tourism industry. They should cooperate to only charges those costs which are strictly justified in the provision of essential supplies and services at break even level. The imitative of the association of major stake holders will offer an opportunity to put in motion a virtuous cycle based on economic growth and sustainable development in the tourism sector.

Strategic Objectives

- a) Revival of inbound tourism.
- b) Low Cost Tourism Trend.

Anticipated Results

- a) Packages tours revival.

Activities

- a) Discuss the Action Point among Stake Holders
- b) PIA, to discount 50 % on round trips to its lower limit fares on international incoming flights to Lahore/ Multan/ Rawalpindi Islamabad for about ten numbers of seats on each flight, may be on specific flights and on specific days from Europe, and Gulf regions.
- c) The 4 stars Hotels and above to discount 50% on its minimum selling price level on 1 to 2 % of the capacity.
- d) Tour Operators to Develop Packages on not more than 10% margin or at as agreed by above two Stake holders

Lead Agency/ Partners

T&RDD/ PIA/ Hotel Association/ PATO/TDCP

Duration

1 Year

Funding

Not Required

Action 27 Promote Annually Punjab Tourism & Handicrafts Exhibition Inviting Tour Operators from Gulf and Saudi Arabian Regions.

Description

The concept of exhibitions has developed all over in the world. Trade shows, business fares and exhibitions offer platforms for artisans, businessmen, corporate, villages, cities, districts; provinces to show case their products to access the markets and opportunities to innovate them. Such joint exhibitions of tourism and handicrafts will create emerging opportunities, and support in creating product awareness, demand and strengthening relations with focus markets. Promote Cultural events and encourage by sponsoring them.

Rational

Punjab's tourism products are weakly promoted in past, however now organized and continued efforts are required to fill up the gaps. Exhibitions are the best means to promote tourism product in collaboration with Punjab's Handicrafts Industry. This event may be combined with Car Rally Event in Cholistan for better projection and to develop interest of Gulf and Saudi Arabian markets .

Strategic Objectives

- a) Awareness Creation.
- b) Product Promotion.

Anticipated Results

- a) Good numbers of people to visit the exhibition.
- b) Strengthening of annual event as an Tourism Identification,
- c) Numbers of tour operator/ travel trade partners will visit Punjab.
- d) Awareness of Punjab's Tourism Product will be created in Regional Markets.
- e) Exports of Punjab Handicrafts.

Activities

- a) Agenda Point to be discussed in stakeholders meeting.
- b) Coordination between T&RDD and PSIC.
- c) Arrangements of the event.

Lead Agency/ Partners

T&RDD/PSIC/TDCP/PATO/TAAP

Duration

5Years

Funding

Sponsoring Agencies/ Contributions/

Action 28 Plan Six monthly Joint seminars/ Exhibitions in collaboration TDCP/ PSIC in Rawalpindi, Lahore, Multan and Quterly Programs in others districts providing opportunities for rural communities to participate

Description

Continuity in seminars and exhibitions for product promotion is imperative. To create sustainable awareness, such action will keep people mobilized and well informed about the development. The interest of the other provinces will be enhanced in Punjab region.

Rational

Frequent interaction and continued interest of Public sector and their support will encourage Private sector to grow.

Strategic Objectives

- a) Awareness creation.
- b) Tourism Sustainability.
- c) Internal Harmony.

Anticipated Results

- a) People will move to know about tourism product.
- b) Local Entrepreneurs will be developed.

- c) Economic activities.

Activities

- a) Agenda point to be discussed among stakeholders.
- b) Select/ Develop Venues for such Exhibitions and seminars.
- c) Develop annual calendar of Exhibition/ Seminars Events

Lead Agency/ Partners

T&RDD/PSIC/ TDCP/Local Governments/ CBO/ Tourism Associations/ Local NGOs

Duration

5Years

Funding

TDCP/PSIC/NGO

Action 29 Develop, Encourage and Sponsor Cultural Events in small towns, preferably underdeveloped districts

Description

Cultural and special events have grown in the tourism industry as indispensable products. Small towns staging traditional cultural events to large cities competing to host mega events in the developed tourism regions are alternative to many urban destinations. Special cultural events can greatly contribute to the over all marketing of the destination by helping to create an image for the city or town.

Rational

When cultural events and programs are sponsored and promoted on continued basis, it gives ample opportunities for local communities to participate in the activities and a rapid tourism growth in the area and address to the, creation of experiences, contribution to destination awareness, contribution in destination positioning.

Strategic Objectives

- a) Revival of native traditions and preservation of intangible culture heritage.
- b) Awareness of destinations.

Anticipated Results

- a) Regular participation will make people habitual to travel.
- b) Smaller towns and under developed districts, will have tourism awareness in local communities and among visitors.
- c) Such cultural events will promote economic activities.

Activities

- a) Share the action point with stakeholders.
- b) Develop a list of cultural events of each district and town.
- c) Interact with Local Govt and communities to arrange events.
- d) Sponsor and find Sponsor ships of the events.

Lead Agency/ Partners

T&RDD/ TDCP/ PSIC/Local Communities/ Local Govt/ NGO

Duration

5Years

Funding

TDCP/SPONSOR/DONOR

Action 30 Strengthen, Relocate and Open New TICs

Description

The TICs are the first line strength of Tourism in Punjab. These tourism information centers are expected to create awareness, educate, guide, and facilitate tourists to access tourism products /services and regions.

M2, motor way from Lahore to Rawalpindi/ Islamabad passes through, Lahore , Sheikhpura, Hafizabad, Sargodha, Jehlum , Chakwal and Rawalpindi districts. Daewoo has developed five service areas on either side of the Motorway at Sukheki, Sial Mor, Bhera, Kallar Kahar and Chakri. These stop over are ideal points for creating tourism awareness, to develop motivation, divert and guide tourists to visit tourists attraction in adjoining districts.

For example, while traveling on M2, Khewra Salt mines, in district Jehlum are on 25 minutes drive from Bhera Service area in district Sargodha and similarly tourism attractions in district Chakwal are easily accessible, at short distances from Kallar Kahar Service Stopover.

M3 and M4, cross districts Lahore, Hafizabad, Fsilabad, TobaTekSingh, Khanewal and Mulatan, while traveling from Lahore for Multan.

Rational

TDCP has opened altogether, 7 TIC, 5 in Lahore region, at Air port, Shahi Hamam, Lahore Fort, Shalimar Garden, and at Gujranwala, and one in Muree, and Rawalpindi each. An assessment of 6 TICs by the consultant, indicates them performing below average and lack, product knowledge, guiding communications, appearance, time management, availability of tourism literature etc. Some of the TICs are not visited by any visitors during the whole day. TICS are not maintaining record to tracking data.

Present TICs run by TDCP may be relocated to the appropriate site where more people are visiting .i.e Large Public Parks, Railway Stations etc and could be easily accessible.

Strategic Objectives

- a) Massive awareness of Tourism in Punjab.
- b) Image building of the Province.

Anticipated Results

- a) Increased number of people to contact TIC.
- b) Professional guidance to the tourism demanding people.

Activities

- a) Performance review/ justification of the existing TICs.
- b) Relocation and opening of new TICs on crowded public places, i.e Railway Stations, Major Public Parks, Potential Religious Shrines.
- c) Jilani Park, in Lahore daily attracts a huge crowd and its monthly visitor's rotation is in hundred of thousands, similarly Jinnah Park in Rawalpindi could be ideal point for TIC, to create tourism awareness in the Province. The services of Government interneers / Private Sector Interneers may be utilized at these places
- d) Opening TICs on Religious Sites.
- e) Opening TICs on Motorways.

Lead Agency/ Partners

T& RDD/ TDCP/

Duration

3 Years

Funding

TDCP

Action 31 Develop Tourism Products Niche Marketing Strategy.

Description

Tourism Potential in Punjab has diverse existing markets those can be capitalized on. Identify niche markets from main source and use niche marketing strategy to target and communicate with special interest travel segments. Niche markets are responsible for driving the growth of tourism is a sustainable way and provide lively hood for marginalized communities.

Examples, Exclusive Birds Watching Trips, Jungles Trips, Agriculture Farms Trips, Moon Light Trips, Walking Trips, Seasonal Agriculture Field Trips, Camel Safaris, Visits to fruit gardens and more

Rational

The rapid growth in niche product development and niche marketing strategies in the tourism markets in the recent years had led even the big international tour operators to include them in their promotional brochures.

Strategic Objectives

- a) Protect Sustainability.
- b) Address to Poverty Alleviation

Anticipated Results

- a) Increase in small group travel.
- b) Increase in Advertising, will result in better awareness.
- c) Special interest traveler markets will be developed

Activities

- a) Action point to be shared with stake holders.
- b) Identify niche tourism product in each zone and develop strategies to promote.
- c) Publish Catalogues on Punjab's Niche Tourism Products.

Lead Agency/ Partners

T&RDD/TDCP/PATO/NGO

Duration

3 Years

Funding

TDCP/DONOR

Action 32 Promote Tourism Market Diversification.

Description

Create day trips and short break holidays for people from major resort complexes, hotels, big guest houses etc.

Rational

Identify tourism attractions in the surroundings of the tourists concentrated sites and complexes and create day trips and short breaks holidays from those tourists' sites and complexes to the varied attraction sites, religious, archeology, natural and cultural heritage sites., The tourists concentration in Muree, during the summer period, could be diversified to day or overnight trips in the surroundings areas to create extra activities.

Strategic Objectives

- a) Tourism Cluster Development.
- b) Entrepreneurial Development.

Anticipated Results

- a) Increased local visitation and visitor expenditure.

Activities

- a) Identify tourism product clusters with easy access to Tourists Residential Sites.
- b) Develop contacts with Management of Tourists Residential Sites.
- c) Jointly identify potential demand and visitors profiles with stake holders.
- d) Develop Packages.

Lead Agency/ Partners

T& RDD/TDCP/ Tourism Stakeholders/ Hotels

Duration

2Years

Funding

TDCP/ Big NGO

Action 33 Participation in SAARC and Gulf Region Tourism Marts

Description

In short and medium term strategy, as we need to focus on regional tourism instead of long haul markets therefore, Tour Operators and Public Sector Tourism Manager need full participation in SAARC and Gulf Regions Tourism Marts and Event Exhibitions.

Rational

During the short and medium term, there is expected financial constrain and strict budgetary control, therefore result oriented spending is suggested.

Strategic Objectives

- a) Sustainable Tourism.
- b) Attracting Tourists from Gulf Region,
- c) Developing near by markets.

Anticipated Results

- a) Movement of Arab Tourists to Punjab.
- b) Pakistani National Working in these regions.
- c) Students Groups.

Activities

- a) Yearly inventory of exhibitions and events to be prepared.
- b) Preparation for each event to be done in advance, with goal and objective set.
- c) Financial support activities to be carried out.

Lead Agency/ Partners

T&RDD/ TDCP/PATO/ CBOS

Duration

5 Years

Funding

T&RDD/TDCP/ Private Sector

13.3 Human Resource Development and Training

A part from the tourists' attraction and the tourism activities, the most important of which is the quality and the level of services offered to the tourists. To meet the standard, a pool of highly skilled human resource able to meet the requirements of the industry, tourism training providing institutions need to be strengthened. A comprehensive tourism human resource development and training strategy needs to focus on

- a. Raising current services level and to support the future tourists demand.
- b. Involving the private sector in the curriculum design and provision of practical training opportunities.
- c. Promoting greater awareness of the importance of tourism.
- d. Better management of the tourism related intuitions and tourism promoting agencies.
- e. Improving the image of tourism as carrier path
- f. Expanding the numbers of the quality tourism training institutions.
- g. Up grading knowledge and competence in managing tourism organizations.

To meet the above thematic objectives, following action points are recommended.

- 1-TDCP, Institute of Tourism & Hotel Management, should be strengthened.
- 2-Qualified private sector entrepreneurs to be encouraged to establish tourism institute in less developed areas.
- 3-Develop Tourism related courses in consultation with Private sector.
4. Regular Professional Courses to be arranged for the staff working in TDCP and T&RRD.
- 5- Review and Develop standards of Tourism Service Providers Agencies.

Action 34 TDCP, Institute of Tourism & Hotel Management, should be strengthened to improve quality training.

The serious defect in private/ public sector tourism human resource training providers is the low quality that has not significantly helped the industry to flourish on high quality and professional level. The adequate training structure to market needs is weak.

Duration

5 years

Action 35 Qualified private sector entrepreneurs to be encouraged to establish tourism institute in less developed areas.

Presently major contributors in Punjab in hospitality sector trainings and source of supplying trained human resource to the industry are TDCP-ITHM and in private sector COTHEM with total 6 establishments.

Duration

5 Years

Action 36 Develop Tourism related courses in consultation with Private sector

Industry's need assessment and accordingly the developing and promotion of those programs, in consultation with industry employers are required. The uniformity of programs in all institutions is to be based upon the industry need.

Duration

5Years

Action 37 Review and Develop standards for Tourism Service Providers Agencies

Action 38 Regular Professional Courses to be arranged for the staff working in TDCP and T&RRD

Intellectual capital is unique. Public sector Tourism Managers shall develop, regulate and implement the standards in Public and in Private sectors tourism service providers' organizations and enhancing the capacity through regular HRD training programs in the recognized Institutions.

Duration

5Years

13.4 Institutional Development

Punjab Tourism Strategy requires an organizational frame work linking all the stake holders to each other for following objectives.

Tourism Sector Strategy for Punjab

- a) Increased attention to sustainability.
- b) Increase attention to local capacity building.
- c) Rapid changes.
- d) Professional Management.
- e) Coordination of development activities.
- f) Safety and Security of the Tourists.

The small tourism businesses from the less developed areas necessarily need to be linked to the main tourism departments and public sectors stake holders. The frame work do exists, but it needs strengthening to support the each district in their needs of tourism infrastructure development.

The consultative process for development and coordinated efforts for implementation and monitoring through formation of a working group on tourism is recommended.

Tourism development institutions i.e TDCP and its affiliates, need capacity building to full fill their mandatory functions. The following actions are recommended for intuitional development.

- 1) Strengthen TDCP, by inducting members in board of directors, from Public Sector Stake holders.
- 2) Department of Tourists Services to be strengthened, by implementing strict control and monitoring mechanism of required licensing and maintaining the required standards prescribed in tourism acts.
- 3) Transport Rental Companies may be regulated through Tourism Department.
- 4) Develop Local Tourism Associations.
- 5) Define Limit of Acceptable Change (LAC) for Cultural and Natural sites.
- 6) Develop Provincial Consultative Committee on Tourism Promotion and infrastructure development.
- 7) Identify Tourism Potential in Each District, and develop sites through established Tourism Associations/CBOs.
- 8) Establish an Endowment Fund for Tourism Sustainability

Action 39 Strengthen TDCP, by inducting members in board of directors, from Public Sector Stake holders.

TDCP is an arm of T&RDD, with mandate to explore, develop, promote and to, manage tourism sector and facilitate private sector to replicate. TDCP to work effectively, the participation and close cooperation is needed from the Public Sector Stake Holders. Therefore to strengthen the intuitional capacity of TDCP through representation of concerned governmental department in BoD of TDCP shall be suggested.

Duration

1Year

Action 40 Department of Tourists Services to be strengthened, by implementing strict control and monitoring mechanism of required licensing and maintaining the required standards prescribed in tourism acts

Intuitional strengthening of DTS will support strengthening of the tourism industry as whole, in Punjab.

Duration

5 Years

Action 41 Transport Rental Companies may be regulated through Tourism Department.

In a current practice car / tourist transport rental companies are not registered and licensed and monitored by DTS, resulting in to Governmental revenue loss and un controlled tourism component.

Duration

5 Years

Action 42 Develop District Tourism Associations and CBOs.

Coordination and communications networks are necessary foundation for local marketing, product development, securities issues and resource allocation for tourism development in general. Creating local bodies representing stake holders at all levels shall be motivational approach to tourism success.

Duration

2 Years

Action 43 Define Limit of Acceptable Change (LAC) for Cultural and Natural sites

Apply guidelines to establish the scale and type of development acceptable in individual environmentally sensitive areas. These should be adapted and applied on local level for all

protected areas, key sites and areas surrounding protected areas, cultural monuments and other no designated sensitive sites.

Duration

1 Year

Action 44 Develop Provincial Consultative Committee on Tourism Promotion and infrastructure development. (PPP)

It's important to have a coordination and communication channel between Public Sectors Tourism Mangers and Private Sectors Tourism Entrepreneurs and to jointly over view the development in the Province. The private sector will have the owner ship to the commitments and the public sector to have constantly professional feed backs from them.

Duration

1 Year

Action 45 Identify Tourism Potential in Each District, and develop sites in coordination through established Tourism Associations/CBOs

DCO of district shall help in developing the inventory and historical back ground of the Tourism Attractions in their areas, and development activities shall be coordinated in consultation with Tourism Associations/ CBOs for sustainable tourism development.

Duration

2Years

Action 46 Establish an Endowment Fund for Tourism Sustainability

Description

Endowment funds are established around the world with the aim to provide sustainability to programs and projects. The seed money is invested and the fund generated is used for the project activities, once the initial work is accomplished. Such examples are widespread around the world as well as in Pakistan (PPAF, NRSP in Pakistan). Protected Areas Management and Mountain Areas Conservancy funds are example from Ministry of Environment.

Rational

After completion of a program and project, sustainability of the activities remains a question. Establishment of the fund promises the same.

Strategic Objectives

- a) Financial Sustainability is the prime objective

Anticipated Results

- a) Continuity in activities of developed strategy.
- b) Strengthening of institution/ bodies.
- c) Widening the scope of activities.

Activities

- a) Initial catalytic activities related with strategy, through project based approach.
- b) Establishment of Funds.
- c) Soliciting investment through diverse donors.
- d) Operationalization.

Lead Agency/ Partners

T&RDD/ TDCP/ Agriculture Dept/ Auqaf, Religious and Minorities Affairs Dept/ Education Dept/ Forestry, wildlife and Fisheries Dept/ Irrigation and Power Dept/ Information, Youth and Cultural Dept/ Local Government & rural Development/ Mines and Mineral Dept/ Planning and Development Dept

Duration

Long term

Funding

GEF/ Federal Government/ Provincial Government/ Banks/ WWF/ IUCN/UNEP/UNDP/US AID/ E.U/

14.0 Conclusion

As ased, unfortunately tourism in Punjab, will not be able to contribute materially in financial terms and in attracting foreign tourist in near foreseeable future, but with implementation of the foregoing strategy, the provincial tourism resources will be known in the surrounding domestic and regional markets and the province will gradually attain a strong tourism base having matured tourism culture, trained man power and developed tourism infrastructure to cater inbound international tourism in medium and long term strategies.

The strengthened and a well coordinated net work is expected to be developed among public sectors stake holders and between public and private sector for better management of the tourism resources and escalating to opportunities for PPP , in even smaller ventures.

It is also likely that subsequent to implementation of the action plan will lead to the initially creation of more than 2000 jobs in private sectors; will support poverty alleviation and rural developments, capacity building of tourism entrepreneurs and growth in about 50 new, small and medium size tourism enterprises, fully capable of meeting future international needs and standards, beside social goals having being achieved. The tourism culture in the province will be flourished; love affection and social harmony among the native people will be developed, ultimately creating in them, the sense of belongings and ownership to the country.

15.0 Public Private Partner Ship Projects

- 1) Lahore Branch, BRBD, Link Canal, may be developed as means of public transportation, to develop a tourism cluster, through PPP. Venture
- 2) Salt Range Wetland Complex, a group of 5 Lakes, along with Thal desert, to be developed and promoted as eco tourism complex through PPP venture.
- 3) Joint Ventures between TDCP/NATCO or TDCP/ DAEWOO to develop a fleet of tourism vehicles at Lahore/ Rawalpindi/ Multan to facilitate Tourists and Tourism Service Providers Agencies in Providing Quality Transport.
- 4) Tourists Site Development (Tourists Accommodation) at Chashma Barrage, District Mianwali, and may be named “Indus River Tourism Site at Chashma Barrage” through PPP venture
- 5) Tourists Site Development (International Standard) at Khewara Salt Mines, District Jhelum and may be named “Khewara Salt Mines Tourism Comple
- 6) Tourists Site Development (Tourist Accommodation) at Taunsa Barrage, District Muzaffar Garh, and may be named “Indus River Tourism Site at Taunsa Barrage” through PPP venture

PPP 1

Lahore Branch, BRBD, Link Canal, may be developed as means of public transportation and to strengthen a tourism cluster in Lahore, through PPP. Venture may be named, Lahore Water Taxi Project.

29 foot taxi cab
yellow 16
passenger boat.

Description



The 32 km long irrigation canal starting at RD 218500 up till its tail at RD314000 on Thokhar Niazbeg carries multiple potentials to address diverse segments for other than, what the canal was originally dig. Due to rapid urbanization and development, now the land irrigation needs in the surrounding areas are either finished or are reduced. The diverse potential may include, introducing water channel for public transportation, beautification of the city, promotion of tourism, the opportunity of leisure and pleasure for the general public, visiting tourists and by possibly introducing , Water Taxi Scheme, ideally at the whole length of the Canal or in patches, between two feasible points. The length of the canal is intersected by some pedestrian and traffic bridges, how ever the major impediments looks two railway crossing and about twelve under passes, those are at approximately at following distances.



S.No	From	To	Appox KM distance
1	Start	Harbnsapura Under pass	7.2
2	Harbnsapura Under pass	Mughalpura Underpass	6.3
3	Mughalpura Underpass	Dhrampura Underpass	2.7
4	Dhrampura Underpass	Mall Road Underpass	1.6
5	Mall Road Underpass	Jail Road Underpass	1.6
6	Jail Road Underpass	F.C.College Underpass	1.6
7	F.C.College Underpass	Feroz Pur Road UnderPass	1
8	Feroz Pur Road UnderPass	Gulzar Underpass	1km
9	Gulzar Underpass	New Campus Underpass	2.34
10	New Campus Underpass	Jinnah Hospital Underpass	2.52
11	Jinnah Hospital Underpass	Docotor Hospital Underpass	2.16
12	Docotor Hospital Underpass	Canal's Tail	3.78

There could be 12 terminal, with progressive mini mall concept made above the under passes. Each Mall may establish about 5 to 6 SME, in them correspondingly promoting each other, the Water Taxi and SMEs.

Rationale

In spite of huge development in the road net work and a net of underpasses and over head bridges, the city is getting congested day by day, roads remain a chaotic maze of slowly moving cars, blaring horns and exasperation. The roads running on the both side of canal are congested with the traffic and more to be in future, although, perhaps there is a plan to widen these roads, but and however a development of new means of transportation, where the base is in tact, is expected to address above mentioned issues and opportunities in shorter span of time.

Strategic Objectives

The objective of the project is to develop an alternate unique passenger transportation system, speeding up the covering distance between points, low cost, developing a tourism cluster in city, connecting three major tourism attractions. Jallo Park, Sozo Water Park, Wagha Border and facilitating the “Tourism for All” concept. The project is expected to develop numbers of SMEs with creation of approximately 2000 Jobs. The project will also help reduce carbon emissions and stress level among commuters.

Anticipated Results

- 1) Due to grandeur project, the rich and the poor people will avail it simultaneously, there fore it will help in developing an inter action and harmony between two societies.
- 2) Tourists in flow in Lahore and Punjab will increase.
- 3) The business opportunities in 2 Parks at the binging of the canal will be enhanced.
- 4) At its full swing, more than 2000 entrepreneurs and enterprises will be benefited with the project.
- 5) Tourism Activities on week ends and holidays will increase.

Activities

- 1) The Project to be technically assessed for its cost and benefit ratio in social terms and economic terms.
- 2) The concept in tourism department to be discussed with reference to the objectives of Tourism.
- 3) A meeting of public sector stake holders to be arranged to develop conscience on the Project.

Lead Agency/ Partners

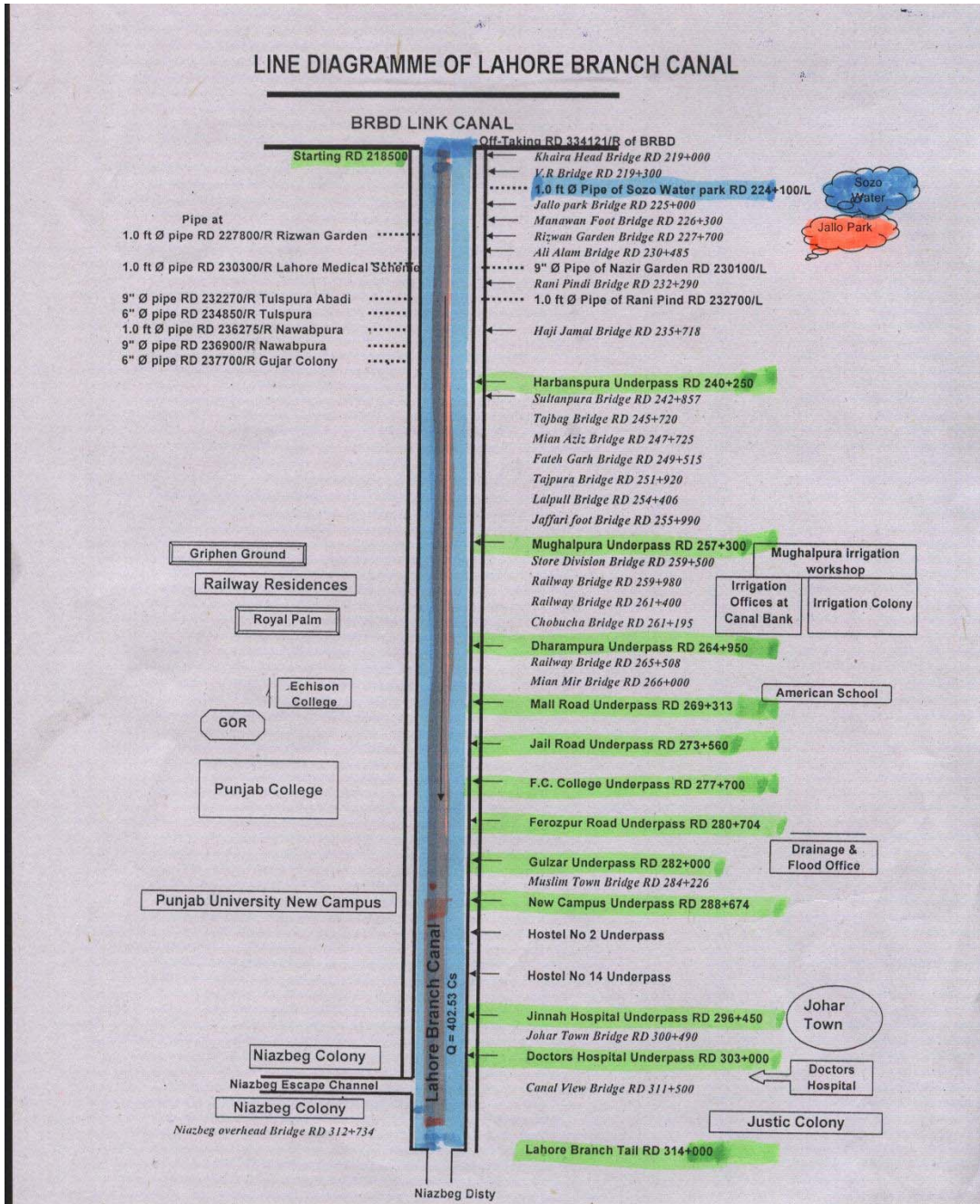
T &RDD/Irrigation Department/ Transport Department / Private Sector

Duration

Phases, 2Years, 4years, 5years

Funding Sources

PPP



PPP 2

Tourists Accommodation in Salt Range Wetland Complex, a group of 5 Lakes, along with Thal desert, to be developed and promoted as eco tourism complex, and may be named “Punjab Lake Zones Tourism Complex” through PPP venture

Description

The Salt Range Wetlands Complex comprises on five independent wetlands. Namal, Kallar Khar, Ucchali, Kabbeki and Jahlar Lakes. The entire SRWC has a total length of 175 km and forms escarpment at the altitude between 250 m and 1,250 m. It runs from Chakwal, in the east and west to Mianwali and Kalabagh along the Indus River.

The three lakes, consisting upon Ucchali, Khabbeki and Jahlar has been designated as a Wetlands of International Importance under the Ramser Convention. These three lakes are situated inside a cup-shaped valley, named Soon Valley, while other two lakes Namal and Kalar Kahar are located on the periphery of this valley. All five lakes fall in declared Protected Area by Punjab Government under Punjab Wild Life Act and their status are mentioned in the following chart.

Sr No	Name of Lake	Status	Total Area
1	Namal Lake	Game Reserve	1200 Acers
2	Kallar Kahar Lake	Game Reserve	210.03 Acers
3	Ucchali Lake	Game Reserve	2320 Acers
4	Kabbeki Lake	Wildlife Sanctuary	700 Acers
5	Jahlar Lake	Wildlife Sanctuary	42 Acers

Source Punjab Wild Life Dept

All five lakes are rich eco tourism spots and need infrastructure development. The Kallar Lake infrastructurally is overdeveloped but in the remaining 4 lakes, there is a scope of Eco-Accommodation development through PPP.

Khabbaki



Fisheries Rest House



Rest House

at Kannati Gardens

Non functional fisheries rest house / quarters at Khabbaki Lake and a rest non-functional district Govt rest house in Kannati Gardens may be considered for accommodation development on public/ private partner ship basis.

Ucchali

Eco-lodges are to be developed either by converting some of the suitable villagers' houses, through lease agreement with them or new development

Jahlar

Eco-lodges are to be developed either by converting some of the suitable villagers' houses, through lease agreement with them.

Model eco-lodges



Namal

Eco-lodges are to be developed by converting existing non-functional rest house of British time, presently under District Government Control.



Rationale

Ecotourism is nature based activities and to extract pleasure in depth from this form of tourism, the users have to become a component of the nature for maximum period of time, what the users planned to spend in natural and wilderness areas. For the purpose the visitors stay need to be as close as possible to these sites and ideally if with in these areas. The eco lodges close or with in the eco sites generates diversified activities those directly provides economic benefits to the communities living in and around these areas which ultimately help in biodiversity conservation.

Khabbaki Lake

Khabbaki Lake, ecotourism spot is potentially one of the richest biodiversity sites in the Soan Valley. The adjacent Kannati gardens, historical Dhadar Village and close by desert areas are its real strengths. The migratory water fowls provide unique opportunities for birds lovers.



Jahalar Lake

Jahlar is one of the culturally and traditionally in tact village in its original shape, of soan valley. The village is only stakeholder in the Jahlar Lake's resources with less population, rich in wetland biodiversity. Old traditions and culture is still practiced and respected in its society. Its people love their traditions and wish to preserve these norms for their future generations. Jahlar lake is a wildlife sanctuary and an important lake of Ramsar Site in Uchhali Complex. It carries all the characteristic of an eco tourism site and visitors may spend two to three nights over here comfortably. It may also be considered this site to be developed on priority basis to serve as model for replication in other places. For developments of Jahlar Lake as eco tourism site,



Ucchali Lake

The Ucchali Lake, identified eco tourism hot spot Soan Valley is the largest lake in Soan Valley and second largest in the Salt Range. The area has the unique attraction for eco tourists. The historical cultural resources of the stake holder villages, Chita, Ogali, Kotli, Koradhi, Kufri, Anga, Ucchali highly exploitable tourism attractions. The spread agricultural area around lake is the motivated factors for promotion of Agro-ecotourism. Wild boar hunting for foreign tourists through local communities is trappable scope. Motivated human resource is available to handle the satisfactory tourism services.



in
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and
are

Nammal Lake

The Nammal Lake is the largest Wetland in Salt Range and it covers more than 2400 Acres of land. By virtue of its characteristic and biodiversity potential, it is one of the great sites in Pakistan, which could be developed for eco tourism purpose. The Lake's biodiversity combination with the historical attractions in surroundings, mighty River Indus flowing on the eastern side of the



MianWali city, a lake on the Indus Flyway with thousands of migratory birds, included some world's unique species in them, over wintering in area, agriculture land and wilderness areas, position it for attractions to eco tourists. The spread agriculture area in its stake holder villages of, Awandi Bamjer, Dokh Rehan, Dokh Ditte Khail, Cha Agral, Moza Dhba Kersia, Dokh Noor Gul, Dokh Podni, Dokh Dharawal, Dokh Haji Noor Khan, Namal, Moza Karli, Rikhi Abadi, carry opportunities of Agro-Ecotourism development that would support the economic uplift of the communities in these villages.

Develop and operates small eco hotels/ rest house/ eco lodges and accommodations facilities to connect with eco tourism sites, attraction, events, festivals, tours and related activities. The accommodation development requirements in each complex and site varies and right choices for the type of accommodation is to be made very carefully, considering infrastructure development strategy in natural and protected areas. These accommodations to be build and operated on quality assured basis with minimum impact on environment

Strategic Objectives

Marginalized rural communities are able to realize the benefits of ecotourism and of biodiversity conservation through income generating opportunities. Small enterprises play key role in the sustainable development by generating economic incentives and keeping the economic benefits close to the home.

With the development of tourist accommodation facilities in the Lake Zones, the flow of the tourist in the area will increase to address the following objectives.

- a) Agro-eco tourism to be promoted on sites, with local communities' involvement.
- b) Birds Watching Tourism to be introduced.
- c) Socio-economic conditions of the communities to be improved.
- d) Inter action between rural and urban societies to be strengthened.

Anticipated Results

- a) Quality network of Eco lodges/ Rest houses/ Eco Hotel close to eco sites.
- b) Socio economic uplift of rural area communities.
- c) Wetlands biodiversity conservations.

Activities

- a) Identify spots to build eco accommodation on eco sites at Jallar and Ucchali Lakes.
- b) Involve land owners in the activities.
- c) Develop Communities Training Programs.

Lead Agency/ Partners

T & RDD/ Forest, Wildlife and Fisheries Department/ Dist Gov/ Private Sector

Duration

2Years

Funding Sources

PPP

PPP 3

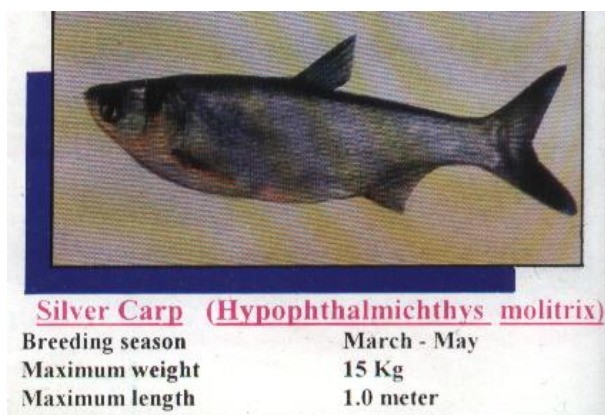
Chashma Barrage

Tourists Site Development (Tourists Accommodation) at Chashma Barrage, District Mianwali, and may be named “Indus River Tourism Site at Chashma Barrage” through PPP venture



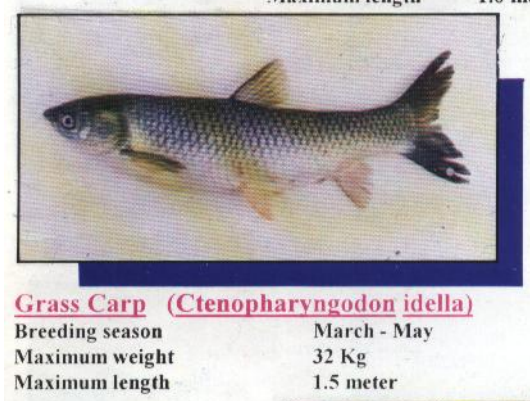
Description

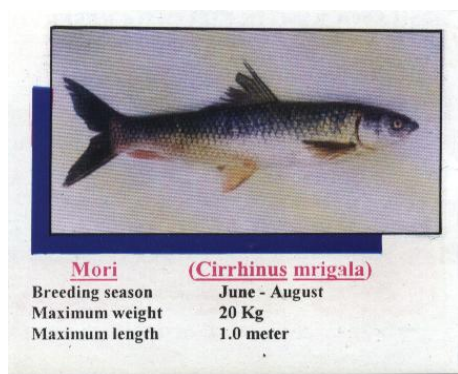
Chashma Barrage is one of the six river structure provided under the Indus Basin Project and is the highest among all. It is located on River Indus some 56 Km downstream of Jinnah Barrage near Kalabagh. A low head hydel power station is built on the barrage, Two canals, C.J.Link Canal (Chashma-Jehlum Link Canal) and CRBC (Chashma Right Bank Canal) are great tourism attractions, those flow out of barrage and pass through multiple eco-regions. There are three spur, forming lakes,



called ponds of Chashma Barrage. Those Lakes provide a good habitat for a variety of fish species and serve staging areas for a large number of migratory waterfowl in winter and spring seasons. In these ponds, about 80,000 to 100,000 birds of Indus flyway land and over winter here. Varieties of indigenous and exotic species of fish are found at Chashma Barrage. Some of the cultivated species here are heavy in weight and growth wise, about two meters in length and could be unique

tourism attractions for the visitors if an aquarium could be build for species to be displayed.





Rational

To develop a tourism culture in the province, the provincial government needs to provide opportunities for the visitors to adopt tourism as the way of life and a learning experience, therefore multiple potential tourism sites need to be developed and promoted. Chashama Barrage is one of the best tourism potential sites on the River Indus for development and promotion of organized trips in the rural areas along the canals out of barrage beside being the scope for the promotion of the following tourism activities in the barrage and surrounding areas,

Hiking, Trekking, Birds Watching, Sport Fishing, Cycling Trips, Animals Safaris

Strategic Objectives

With the development of tourist accommodation facilities on Chashma Barrage, the flow of the tourist in the area will increase to address the following objectives.

- a) Tourism to be promoted on sites, with local communities' involvement.
- e) Birds Watching Tourism to be introduced.
- f) Socio-economic conditions of the communities to be improved.
- g) Inter action between rural and urban societies to be strengthened.
- h) Promotion of Environmental Education.

Anticipated Results

- a) Tourists will have varieties of choices in the province.
- b) Support to develop tourism culture through gained tourism momentum.
- c) Conservation of wetland biodiversity.
- d) Socio-economic uplift of the marginalized communities.
- e) Rural Development.

Activities

- a) Identify spot to build tourist accommodation on the site.
- b) Possibility of leasing Irrigation department, Khyber Pakhtoonkhawa Rest house at Chashma may be considered.
- c) Involve local government in the activities.
- d) Develop Communities Training Programs in tourism sector to produce Local tourism entrepreneurs.

Lead Agency/ Partners

T&RRD/ Local Government/ Private Sector/ NGO

Duration

One Year

Funding Sources

ADP/Donor Agency

PPP 4

Taunsa Barrage

Tourists Site Development (Tourist Accommodation) at Taunsa Barrage, District Muzaffar Garh, and may be named “Indus River Tourism Site at Taunsa Barrage” through PPP venture



River Indus in down stream at Taunsa Barrage

Description

Taunsa Barrage was constructed during 1953-58 and was commissioned on 3rd March 1959. The barrage is located across River Indus at a distance of 18Km from the famous town of Kot Adu, which is a Tehsil head quarter of Muzaffargarh district. The religious town, Taunsa Sharif is situated on the right bank of the Indus river 30 Km up stream of the Barrage. The barrage is delivering and contributing in the economy through following.

I. Provides facility for diversion of 20450 cusecs of water for 2.23 million acres of fertile agriculture land of Muzaffargarh, D.G.Khan and Rajan Pur Districts.

II. The barrage has built in provision for commanding additional 0.4 million acres cultivable area of D.G.Khan and Rajanpur district, after canal extension facilities are taken up, the Dajal branch extension.

III. Serves as important/vital rail cum road link between Sindh and Khyber Pakhtoonkhwa.

IV. The barrage structure also houses a 16" dia high pressured pipe line of PARCO linking Karachi with their up-country storage at Mehmood Kot Terminal, beside 16" dia gas pipe line from Dhodak Oil & Gas field.

V. Provides facility for a telephone and two extra high voltage transmission line crossing.

VI. A head regulator is under construction to feed the kachhi Canal which will irrigate 713000 acres of barren land of Kachhi plains in Balouchistan.

VII. The barrage also figures in the Indus Basin Replacement Project plan and can provide 12000 cusecs of water to River Chanab through 38.2 miles T.P.Link Canal (Taunsa-Panjand link canal) for supplementing the water requirement at Punjand Head works.

The barrage lies along the Indus flyway, where numerous species of migratory waterfowl, about 70,000 to 90,000 in number land in the lakes of the barrage and stay from October till end of March, when they return to Siberia.

The picturesque landscape, Indus Dolphin in the up and down stream, other wild fauna in surroundings, the migratory birds, wilderness sites, the cultural historical locations, agriculture farming and huge fruits gardens are potential tourists attractions.

The T.P. Link canal, Deara Ghazi Khan and Muzaffargarh Canals out of Taunsa Barrage have rich bio-diversity, eco-regions diversity, on route passing through plains, wilderness and desert regions. Wildlife Sanctuary in up stream and the Indus Dolphon Reserve between Taunsa Barrage and Ghazi Ghat in the down stream area are hot spot of tourism.

Rational

To develop a tourism culture in the province, the provincial government needs to provide opportunities for the visitors to adopt tourism as the way of life and a learning experience, therefore multiple potential tourism sites need to be developed and promoted initially with view to promote internal tourism and eventually supplementing to foreign in bound tourism. Taunsa Barrage is one of the best tourism potential sites on the River Indus for development and promotion of organized trips in the rural areas along the canals out of barrage with the scope for the promotion of the following tourism activities in the barrage and surrounding areas,

Hiking, Trekking, Birds Watching, Sport Fishing, Cycling Trips, Animals Safaris, Indus Dolphins Viewing, Sailing in River Indus, Eco-tourism, Agro-ecotourism

Strategic Objectives

With the development of tourist accommodation facilities on Taunsa Barrage, the flow of the tourist in the area will increase to address the following objectives.

- a) Tourism to be promoted on sites, with local communities' involvement.
- i) Birds Watching Tourism to be introduced.
- j) Socio-economic conditions of the communities to be improved.
- k) Inter action between rural and urban societies to be strengthened.
- l) Promotion of Environmental Education.

Anticipated Results

- a) Tourists will have varieties of choices in the province.
- b) Support to develop tourism culture through gained tourism momentum.
- c) Conservation of wetland biodiversity.
- d) Socio-economic uplift of the marginalized communities.
- e) Rural Development.

Activities

- a) Identify spot to build tourist accommodation on the site.

- b) Possibility of acquiring Irrigation department rest house on Kot Adu- Taunsa barrage road or utilizing part of its land for the tourism purpose.

- c) Involve local government in the activities.

- d) Develop and organize Communities Training Programs in tourism sector to produce Local tourism entrepreneurs.



Lead Agency/ Partners

T&RRD/ District Government / NGO/ Local Community

Duration

One Year

Funding Sources

ADP/ Donor Agency/ Big NGO

PPP 5

Salt Mines

Tourists Site Development (International Standard) at Khewara Salt Mines, District Jhelum and may be named “Khewara Salt Mines Tourism Complex”



Inner view of Salt Mines

Description

Mining and mineral resources are the potential tourism attractions. The salt mines at Khewara are one of the attractive tourism sites in Punjab. The site has more potential and further scope to present it to the foreign and domestic tourists. Presently the tourism in salt mines at Khewara is being managed by PMDC. The management of the attractions is an average at local standard but a far behind from the international tourism presentations for such sites.

Khewara Salt Mines Resort may be developed to an International standard tourist's site, with comfortable over night stay facilities. Land use planning, should include other tourist facilities on the site, i.e. handicrafts shops, museum, slide show presentation hall, local artesian enclosure and others to develop tourism cluster.

Rational

To develop a tourism culture in the province, the provincial government needs to provide opportunities for the visitors to adopt tourism as the way of life and a learning experience, therefore multiple potential tourism sites need to be developed and promoted initially with view to promote internal tourism and eventually supplementing to foreign in bound tourism. The area around site is rich in history and culture, including a railway station. The tourism complex could be developed on international standard facilities, and land use planning, developing a tourism cluster in the complex. The present potential of the site in terms of number of visitors and revenue is as under.



No of Visitors

Period	Adult	Student	Foreigner	Total
2002-2003	28,072	39,486	566	86,124
2003-2004	52,050	76,758	1252	130,050
2004-2005	62,908	91,782	1687	156,357
2005-2006	77,097	94,660	1880	173,637
2006-2007	103,927	114,728	2328	220983
2007-2008	125,003	115,215	1614	241,832
2008-2009	117,327	112,711	1404	231,442
2009-2010	136,664	100,558	1345	238,567

Revenue Proceeds

Period	Entry Fee	Parking Fee	Train Tkt	Salt Model	Guest House	Pamphlet	C. Contractor	Total
2002-2003	1,579,685	52,220	218,590	321,611	100,799	2930	28,000	2,303,836
2003-2004	3,140,505	114,250	525,770	560,812	52,658	40,085	140,000	4,674,060
2004-2005	4,431,035	190,550	880,125	591,376	27,570	67,835	319,667	6,508,338
2005-2006	5,583,145	316,385	1,329,370	528,186	28,200	51,010	459,000	8,295,296
2006-2007	9,808,790	442,315	2,111,585	557,628	29,800	29,357	914,700	13,894,175
2007-2008	11,848,815	577,465	2,140,790	447,960	11,600	13,875	1,271,942	16,312,447
2008-2009	18,229,800	591,980	2,802,070	534,228	13,900	7,3585	1,526,310	23,705,623
2009-2010	19,598,950	815,638	2,449,480	555,928	58,150	6,700	2,171,240	25,656,086

Strategic Objectives

- e) Multiple choices with the tourists to visit tourism complexes/sites.
- f) Communities living around sites to get benefits and their socio-economic conditions to be improved.
- g) Inter action with rural communities.
- h) Learning experience.
- i) Accessible tourism activities for all

Anticipated Results

- a) Interest of the stakeholder communities will increase in conservation.
- b) Socio-economic conditions of the poor communities living around tourism attraction will be uplifted.
- c) Understanding and harmony between urban and rural areas will improve.
- d) Over night stay will encouraged.

Activities

- a) A development master plan of the site to be prepared.
- b) The master plan to be discussed among private/ public sector stake holders.

Lead Agency/ Partners

T&RRD/ PMDC/DONOR AGENCY

Duration

2 Years

Funding Sources

ADP/Donor Agency

PPP 6

Action 9 TDCP/ Daewoo or TDCP/ NATCO to develop a Transportation Tourism Infrastructure in the province

Description

In tourism, accommodation and transport plays important role. The public transport infrastructure is sub standard and mismanaged in private sector.

Rationale

The transport being a basic component of tourism industry is vital for its success. In present scenario the tourism transport infrastructure in the province is expensive, sub standard, mismanaged and weak. There fore in order to address the issue and to facilitate the tourists, the possibility of establishing a JV of TDCP in association with a transport company, NATCO or with Daewoo or any other infrastructural sound transport enterprise, may be studied and developed initailly in Rawalpindi, Lahore and Multan districts.

Strategic Objective

- a) Reliable and inexpensive fleet of Tourism Transport, for tourists and tourism service providers, in major cities i.e Rawalpindi, Lahore, Multan.
- b) Direct access to the facility by tourists.

Anticipated Results

- A) Availability of comfortable moderate rate transport will encourage more travel by tourists.

Activities

- A) Discuss the ideas, with PATO representative.
- B) Discuss the concept with NATCO and Daewoo separately, and have feed back.
- C) Sign MoU, with agreed partner entity.

Lead Agency Partners

T&RDD/ TDCP/ NATCO or Daewoo

Duration

One Year

Funding Source

PPP

16.0 Action Plan Timetable

No	Action	2011	2012	2013	2015	2016
	Information Management					
1	Innovate in tourism data collection system.	√				
2	Create and implement Signage standards and system.	√				
3	Create Tourism “Best Practice” Portal	√				
4	Develop a Digital Library For Tourism Media Resources.	√				
5	Develop Website of Potential Tourism Resources of each District	√	√			
6	Develop Marketing Decision Support System (MDSS)	√				
7	Over Come the Fear Factor of Tourism in Pakistan	√	√	√	√	√
	Tourism Enterprises Development					
8	Develop Tourism Enterprises through PPP with private sector inside the country for domestic tourism and out side for inbound International Tourism by offering TDCP franchise.	√	√			
9	Create Tourism Financial Incentive Mechanism.	√	√	√	√	√
10	Encourage Small Tourism Enterprises (Accommodation) Development.		√	√	√	√
11	Strengthen Private Sector, by offering Franchise of Punjab Tourism Enterprises in Hotels, Tour Operators and Handy Crafts Shops	√	√	√		
12	Investments pre feasibility reports in tourism sectors, principled on SMES be developed, for over seas Pakistanis in the rural areas.	√	√	√		
	Product Development and Quality Assurance					
13	Develop Mining and Mineral Resource as Tourism Product	√	√	√	√	√
14	- Develop eco-tourism in protected areas	√	√	√	√	√
15	Develop Agro eco Tourism Concepts in Villages	√	√	√	√	√
16	Developed Linkage of Religious Pilgrimage to Cultural and Heritage	√	√	√	√	√
17	Focus on Developing Desert Tourism Product	√	√	√	√	√
18	Develop Adventure Tourism	√	√	√	√	√
19	Develop Irrigation Canals as Tourism Spots	√	√	√		
20	Strengthen Cultural Events and Traditional Celebrations	√	√	√	√	√
21	Develop Groups of Products in Tourism Zones and Develop	√	√	√	√	√
22	Develop Punjab Handicrafts as tourism Product	√	√	√		
23	Develop sets of tour itineraries to access product Regions.	√	√			
24	Develop Protected Areas Rest Houses/ Dak Bungalow System	√	√			

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	Marketing, Promotion and Awareness Creation					
25	Develop Joint Venture between TDCP and Punjab Education Foundation for Introducing Tourism Awareness Programs from class 6 th to class 10 th , as pilot project	√	√	√	√	√
26	Develop Joint Venture between PIA/ HOTEL/ TDCP or Private Sector to promote Punjab as Cheap and valued destination for International tourists as Public/Private Funding Partnership.	√				
27	Promote Annual Punjab Tourism & Handicrafts Exhibition Inviting Tour Operators from Gulf and Saudi Arabian Region	√	√	√	√	√
28	Plan Quarterly joint seminars/ exhibitions in collaboration of TDCP/ PSIC in Rawalpindi, Lahore, Multan and Monthly Programs in others districts providing opportunities for surrounding rural areas communities to participate.	√	√	√	√	√
29	Develop, Encourage and sponsor Cultural Events	√	√	√	√	√
30	Strengthen, Relocation and Open New TICs	√	√	√		
31	Develop Tourism Products Niche Marketing Strategy.	√	√	√		
32	Promote Tourism Market Diversification.	√	√			
33	Participate in SAARC, and Gulf Area Tourism Marts	√	√	√	√	√
	Human Resource Development and Training					
34	TDCP, Institute of Tourism & Hotel Management, should be strengthened.	√	√	√	√	√
35	Qualified private sector entrepreneurs to be encouraged to establish tourism institute in less developed areas.	√	√	√	√	√
36	Develop Tourism related courses in consultation with Private sector.	√	√	√	√	√
37	Regular Professional Courses to be arranged for the staff working in TDCP and T&RRD.	√	√	√	√	√
38	Review and Develop standards of Tourism Service Providers Agencies.	√	√	√	√	√
	Institutional Development					
39	Strengthen TDCP, by inducting members in board of directors, from Public Sector Stake holders.	√				
40	Department of Tourists Services to be strengthened, by implementing strict control and monitoring mechanism of required licensing and maintaining the required standards prescribed in tourism acts.	√	√	√		
41	Transport Rental Companies may be regulated through Tourism Department.	√	√	√	√	√
42	Develop Local Tourism Associations.	√	√	√		
43	Define Limit of Acceptable Change (LAC) for Cultural and Natural sites.	√	√			
44	Develop Provincial Consultative Committee on Tourism Promotion and infrastructure development.	√	√			
45	Identify Tourism Potential in Each District, and develop sites through established Tourism Associations/CBOs.	√	√	√		
46	Establish an Endowment Fund for Tourism Sustainability	√	√	√	√	√

ANNEXURES

Tourism Sector Strategy for Punjab

People Met During the study

No	Name	Title
1	Mr Hifz-ur- Rehman	Federal Secretary Tourism
2	Mr Jaweed Akhter	Federal Secretary Minorities
3	Mr Aamir Ashraf Khawaja	Secretary Tourism Punjab
4	Mian Waheed-ud-Din	M.D. TDPC
5	Mr Tariq Mahmood Javaid	G.M. Operations, TDPC
6	Ms Ayesha Zareen Siddiq	G.M. Administration TDPC
7	Ms Bushra Bashir	Dy Secy Tourism & RDD
8	Mr M. Mujtaba Piracha	P.D. PRMP
9	Mr Omar Mukhtar	Dy Program Director PRMP
10	Syed Naeem Geelani	Asst Director (PSD) PRMP
11	Mr Zafarullah Siddiqui	Economic Analyst M/o Tourism
12	Tahir Mehmood Rana	Manager Marketing TDPC
13	Mr Saleem Ullah Shahani	Manager Group Tours PIA LHE
14	Mr Javed Akhter	Passenger Sales Manager PIA LHE
15	Mr Sikandar Hayat	Dy G.M TDCP Rawalpindi
16	Mr Zulfiqar Ali Shaikh	Regional Director, Punjab Education Foundation Rawalpindi
17	Mr Anwar Khan	Dy Secy M/o Minorities
18	Mr Sareer Mohammad Khan	M.D. PTDC
19	Mr Akhtar Mummunka	M.D. Indus Guide, Tour Operator
20	Mr Ijaz Ahmed Butt	Dy Manager, Tours Promotions TDCP
21	Mr Tahir Niazi	Principal, ITHM TDCP, Lahore
22	Mr Khalid Jamil	ITHM, TDCP Rawalpindi
23	Mr Maoud Bakht	Dy Chief NTRC, Islamabad
24	Mian Tahir Raza	G.M. Park Plaza Hotel Lahore
25	Syed Jawad Hussain	Manager, PIA, Inadmissible Passenger Cell & Task Force
26	Mr Mansoor A. Mela	District Manager PIA Lahore
27	Mr Orya Maqbool Jan Abbasi	D,G Walled City Lahore Project, Govt of Punjab
28	Mr Muhammad Shoaib Qureshi	Team Leader , Sustainable Development of Lahore Walled City Project, Lahore, Associated Consulting Engrs
29	Mr Yasser Ahmad Gauhar	- do -
30	Mr Masood A. Khan	Technical Director A.K.C.S Walled City Lahore Project
31	Mr Shozad Qureshi	Manager TIC TDCP Changamanga
		Dy Secy Planning , Transport Dept
32	Mr Khalid Saleem	Add Secy Transport Punjab
33	Mr Rao Ghulam Hussain	Add Secy Mines and Mineral Dept Punjab
34	Mr Wazir Ahmed Bosan	Asst Controller DTS Lahore
35	Mr Abdul Rehman Khan Tipu	In charge PMDC Lahore
36	Mr Muhammad Aslam	G.M Planning and Operation Punjab Mineral Development Corporation
37	Mr Munawar Saeed Sheikh	G.M. Operation Daewoo Pakistan
38	Syed Istiaq Hussain	Manager Mines and Mineral Dept, Punjab
39	Mr Akhter Javed Malik	D.G. Mines and Minerals Dept Punjab
40	Mr Abdul Qadeer Mehal	Director Wildlife and Parks, Punjab, Wild Life Dept
41	Mr Muhammad Naeem Bhatti	Dy Director Head Quarter, Punjab Wildlife and Parks Dept, LHE
42	Mr Tayyab Syed	Karavan Leader, Tour Operator
43	Mr Saeed Wala	MD TDCP. Lahore
44	Mr Munawar Majoker	G.M Operation TDCP, Lahore

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45	Mr Babar Hassan Bharwana	Secy Forest, Wildlife and Fisheries
46	Mr Shahid Rashid Awan	Dy Secy Planning, Forest, Wildlife and Fisheries, Lahore
47	Mr Shahid Abbas	Executive Asst Manager, Avari Hotel Lahore
48	Tanweer A. Siddqui	Sr Manager Operation and Planning Lahore Transport Company
49	Mr Shahid Vaince	Manager Operation, Site Office Motor Way Services Areas M2 Sukhekhi, Dist Hafizabad.
50	Mr Engr Arfan Shah	Project Manager Khewra Salt Mine, PMDC
51	Mr Engr Bashir Ahmed	G.M Planning, NHA, Islamabad
52	Mr Umed Khalid	Conservator, NCCW, Islamabad
53	Mr M. Rashid Khan	General Manager Marketing, PMDC, Head Office Islamabad.
54	Syed Zain Gilani	Director, Board of Investment, Islamabad.
55	Mr Aatif Umar Khalil	Dy Director, Board of Investment, Islamabad
56	Eng Farhad Maqpon	M.D Shikar Safaris, Pakistan, Islamabad
57	Mr Sajid Quddus	DFO, Forest Sialkot Region
58	Mr Munir Ahmed Chaudhry	Joint Secy Min of Minorities
59	Mr Kaiser Khan	CEO Pakistan Guides, Tour Operator
60	Rana Shahbaz	DFO, Wildlife Chakwal District
61	Mr Waheed Ahmed	Asst Director Punjab Small Industries
62	Mr Shaukat Zaman Butt	Dy Chief, F&S Operation MoT
63	Mr Khalid Pervez	S.O. Min of Culture
64	Mr Hamayun Rashid	C.E Rainbow Travel and Tours, LHE
65	Mr Nazir Ahmed	Director, Punjab Small Industries
66	Mr M. Arif Javaid	Joint Director PSIC Lahore
67	Mr Sahib Zaka	Director Planning PSIC Lahore
68	Mr Salman Javed	Chairman, FPCCI Standing Committee on Tourism
69	Syed Zulfiqar Hussain	Expert, Social Marketing & Events
70	Mr Ahmed Shafiq	Chief Executive COTHM, Lahore
71	Mr Baber Sheikh	Director, COTHM, Lahore
72	Mr Arif Chaudhry	Director, Holiday Inn Lahore
73	Mr Zahoor Durrani	Vice Chairman Tour operators Association
74	Mr Zahid Hussain Bokhari	Add Secy (Shrines) ETPB
75	Mr Syed Faraz Abbas	Dy Secy (Shrines) ETPB
76	Ch, Riaz Ahmed	Dy Secy (Admn) ETPB

ADP ANALYSIS

S.No	District	Name of Scheme	Cost in Million
		On Going Schemes Shown in 2010-11 ADP	
1	Bhalwar Pur	Development of Tourist Village, near Derawar Fort Cohlistan,	120,000
2	Lahore	Construction of Tourism Complex at Trade Centre, MA Johar Town, Lahore	40.000
3	Nankana Sahib	Development of Tourist Resort at Nankana Sahib	40.000
4	Bhawalpur	Rehabilitation and conservation of Bibi Jiwindi Tomb Complex, Uch Sharif	63.270
5	Bhawalpur	Renovation / Up Gradation of Lal Sohanara Resort Bhawalpur.	46.325
		Schemes shown in ADP 2009-10, but not carried in on going schemes 2010-11	
	Murree	Beautification and provision of civic amenities at Murree	564.000
	Murree	Revamping of existing facilities and provision of additional facilities at Patritia Sky Ride Project.	200.000
	Murree	Feasibility Study for Installation of Rope Way System with Supporting Facalities from Jhika Gali to Murree.	10.000
	Chakwal	Renovation and up gradation of Kallar Kahar Resort	12.682
		New Schemes (Regular) ADP 2010-11	
1	Rawalpindi,Murree	Installation of Ropeway System with supporting facilities from Jhija Gali to Murree(Phase 1) Approved	1,535.000
2	Rawalpindi,Murree	Provision of Touristic Facilities in Murree .(Un approved)	51.112
3	Khushab	Establishment of a Tourist Resort at Khabaki Lake District, Khushab	40.000
4	Khushab	Establishment of a Tourist Resort at Uchalli Lake Dist Khushab	43.000
5	Rawalpindi, Murree	Surveys and Studies to prepare Master Plan to Develop Murree as pollution free tourist town.	40.000