Workshop on Pakistan Tourism

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UNWTO expert

29 Jan 2018
Outline

Key Challenges Faced by Pakistan’s Tourism Industry

Tourism destinations: concepts & definitions

Methodological approach

Items on global tourism agenda

Focus on sustainability
Key challenges

A Position Paper on Challenges Faced by Tourism Industry of Pakistan
8. Key Challenges Faced by Pakistan’s Tourism Industry

- 8.1 Negative Image as a Tourism Destination
- 8.2 Low Priority to Tourism Sector
- 8.3 Security and Safety of Tourists
- 8.4 Difficulty in getting Pakistani Visa
8.5 Lack of inter-departmental Coordination

8.6 Lack of Private Sector Investment in Tourism Sector

8.7 Government in the Role of a Business Manager
8. Key Challenges Faced by Pakistan’s Tourism Industry

• 8.8 Lack of Proper Enforcement of Standards and Certifications

• 8.9 Lack of Proper Marketing and Promotion

• 8.10 Insufficient Use of IT for Tourism Promotion

• 8.11 Ineffective Participation in International Tourism Fairs and Festival
8. Key Challenges Faced by Pakistan’s Tourism Industry

- 8.12 Dilapidated Tourism Infrastructure and Negative Impacts of Natural Environment
- 8.13 Tourism Workforce Development
- 8.14 Lack of Research in Tourism Sector
- 8.15 Multiplicity of Taxes
Outline

Tourism destinations: concepts, definitions, life cycle

Methodological approach

Items on global tourism agenda

Focus on sustainability
destination life cycle
Mature destinations
Greece: overview

Brand Awareness "Greece"


Trendy  Popular  Familiar  Tiring

???
Brand awareness

![Graph showing brand awareness over Olympic years.](image-url)
Tourism destinations:
  concepts, definitions, life cycle

Methodological approach
Institutional issues
Demand & Supply
Human capital

Items on global tourism agenda

Public-private partnerships
Institutional issues

- Lack of inter-departmental Coordination
- Security and Safety of Tourists
- Difficulty in getting Pakistani Visa
- Government in the Role of a Business Mgr
- Lack of Research in Tourism Sector
- Multiplicity of Taxes
- Low Priority to Tourism Sector
Tourism demand

- Negative Image as a Tourism Destination
- Lack of Proper Marketing and Promotion
- Insufficient Use of IT for Tourism Promotion
- Ineffective Participation in Int Tourism Fairs
Tourism supply

• Lack of Proper Enforcement of Standards and Certifications
• Lack of Private Sector Investment in Tourism Sector
• Dilapidated Tourism Infrastructure and Negative Impacts of Natural Environment
Human capital

- Tourism Workforce Development
Employment policy for tourism

Flexibility
Vocational & lifelong training

Training as a productive investment
Vocational & lifelong training

Continuous training for tourism businessmen and managers

Priority recruitment of tourism school graduates

Training as a productive investment

Support of both private and public education system

Extended use of new training applications e.g. e-learning
Decisions

Quality or Quantity?

Established or New Markets?

Subsidies for all or “good horses” first?

Unit or Destination?

Private Investment Subsidy or Infrastructure Funding?

Incoming or Domestic Tourism?
Tourism destinations:
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  Human resources

Items on global tourism agenda

Public-private partnerships
How much supply? Which products?

- Tourism Industry
- Host Communities
Product portfolio strategy

Product Portfolio

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Supply management - sports

- Sports as hobby
- Sport games
- Training programs of professional athletes
- Sports tourism
Supply management - sports

<table>
<thead>
<tr>
<th>Proposed sports products where Greece has:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HISTORICAL TRADITION</strong></td>
</tr>
<tr>
<td>· wrestling</td>
</tr>
<tr>
<td>· Marathon</td>
</tr>
</tbody>
</table>
Matching products with markets

A. MARKET PENETRATION
B. PRODUCT DEVELOPMENT
C. MARKET DEVELOPMENT
D. DIFFERENTIATION PRODUCT / SERVICES
Market priority

Key to colour coding:
- BUYING: 0 - 9
- POWER INDEX: 10 - 24, 25 - 40, 41 - 60, 61 - 80, 81 - 100, 100 - 199, 200 - 299, 300 plus
- SPENDING PER CAPITAL: per year for international travel (Well European Average - Index 100)

Key to symbols:
- Country Borders
- Name of ETM Region
- Name of local market
- ECU turnover: more than 2 billion, 1 billion - 2 billion, 500 million - 1 billion, 500 million - 0.5 billion, 0.5 billion - 0.1 billion, < 0.5 billion
- Other key local markets

Data source: EUROPEAN TRAVEL MONITOR

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Items on global tourism agenda

Public-private partnerships
Distribution model

Initial model

- Demand
  - Travel agencies
  - Tour operator
  - Airline
  - Services
  - Hotel

New model

- Demand
  - Travel agencies
  - Tour operators
  - Supply
    - Airline, accommodation, services, entertainment, etc.

Direct sale
Institutional reforms
Branding System on country level

GEOGRAPHIC TRADEMARKS - BRANDS

Pakistan

Area 1
Area 2
Area 3
Area 4
Area 5
Area 6

Brands
Product 1
Product 2
Product...

Labels
Sightseeing
Islands
Cities...

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Spanish Trademarks, Brands & Labels

**Trademarks**
- Illes Balears
  - Mallorca Menorca Ibiza Formentera
- Canarias
  - Naturaleza Calida
- Cantabria
- Asturias paraiso natural

**Brands**
- Paradores
  - Mil sensaciones, sólo un lugar
- Spanair
  - Member of the SAS Group
- Trasmediterranea
- Sol Melia

**Labels**
- Calidad Turistica
- Vias Verdes
- www.caminosantiago.com

UNWTO - a Specialized Agency of the United Nations
French Trademarks, Brands & Labels

Trademarks

Brands

Labels

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Public-private partnerships
Tourism @ national level

Government

Wider Public Sector
- Local governments,
  Prefectures, Municipalities,
  Companies of public interest

Tourism Private Sector

Other Private Sector,
- Media, Academic
  Community,
  General public

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Governments

• Develop international clusters
• Exchange data & Know-How

Tourism Private Sector
Country a Country b Country c

Regional Bodies & Organizations e.g ETC, PATA

Tourism @ regional level
Tourism @ global level

UNWTO
- Technical assistance
- International networking & cooperation

How actively involved?

Private Sector

Member States
Institutionalization - private sector

Universities - Professional training

Destination Management Organization (DMO)
Field experts - Managers

Private Sector:
- Restaurants
- Local commerce chambers
- Entertainment companies
- Local tourism associations

Public Sector:
- Local governance authorities
- Civil Aviation Authority
- Museums/Archeological sites
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**Items on global tourism agenda**
  Connectivity, travel facilitation

Focus on sustainability
Pakistan's top 12 airports

Monthly seat capacity S15
(Seat capacity change S14 v S15)

<table>
<thead>
<tr>
<th>Airport</th>
<th>Change (%)</th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karachi (KHI)</td>
<td>+23%</td>
<td>418,305</td>
</tr>
<tr>
<td>Lahore (LHE)</td>
<td>+13%</td>
<td>271,883</td>
</tr>
<tr>
<td>Islamabad (ISB)</td>
<td>+16%</td>
<td>243,476</td>
</tr>
<tr>
<td>Peshawar (PEW)</td>
<td>+21%</td>
<td>70,022</td>
</tr>
<tr>
<td>Multan (MUX)</td>
<td>+64%</td>
<td>52,059</td>
</tr>
<tr>
<td>Quetta (UET)</td>
<td>+62%</td>
<td>34,577</td>
</tr>
<tr>
<td>Sialkot (SKT)</td>
<td>+30%</td>
<td>30,331</td>
</tr>
<tr>
<td>Faisalabad (LYP)</td>
<td>+61%</td>
<td>15,609</td>
</tr>
<tr>
<td>Bahawalpur (BHV)</td>
<td>+16%</td>
<td>8,698</td>
</tr>
<tr>
<td>Rahim Yar Khan (RYK)</td>
<td>+41%</td>
<td>7,174</td>
</tr>
<tr>
<td>Sukkur (SKZ)</td>
<td>+60%</td>
<td>7,092</td>
</tr>
<tr>
<td>Turbat (TUK)</td>
<td>+41%</td>
<td>4,264</td>
</tr>
</tbody>
</table>

SOURCE: anna.aero | EXCLUSIVE DATA PROVIDER: OAG Schedules Analysers

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Pakistan's top 12 country markets

Seat capacity change S15 v S14
(Overall seat capacity in S15)

-10% 0% 10% 20% 30% 40% 50%

Pakistan (38.6%)
UAE (29.1%)
Saudi Arabia (12.7%)
Qatar (4.5%)
Oman (2.9%)
UK (2.7%)
Thailand (1.9%)
Bahrain (1.8%)
Turkey (1.7%)
Kuwait (0.9%)
China (0.6%)
Sri Lanka (0.6%)

SOURCE

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Connectivity

One belt, one road – China’s new Silk Road

Source: MERICS, DW 12/2015

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Travel (visa) facilitation

Türkiye Cumhuriyeti Elektronik Vizesi
Electronic Visa, Republic of Turkey

Referans No
Reference No : 6AM

Adı
Name : Abdul Wali

Soyadı
Surname : Khan

Doğum Yeri
Place of Birth : Karachi

Doğum Tarihi
Date of Birth : 01 May 1990

Uyruk Adı
Nationality : Pakistan

Seyahat Belgesi
Travel Document : Umuma Mahsus Pasaport
Ordinary Passport

Belge No
Travel Document No.

Belge Veriliş T.
Travel Doc. Issue Date : 23 May/May 2013

Belge Geçerlilik T.
Travel Doc. Expiry Date

Ek Vize
Additional Visa : Vize / A.B.D.
Viza / USA

Ek Vize Geç. T.
Additional V. Expiry Date : 07 Nis/Apr 2021

Giriş Sayısı
Number of Entries : Tek Giriş
Single Entry

Geçerlilik Tarihi
Valid From : 20 Kas/Nov 2016

Geçerlilik Bitişi
Valid Until : 18 May/May 2017

İkamet Süresi
Duration of Stay : 30 Gün / Days

PLEASE READ CAREFULLY!

- I am travelling for the purposes of tourism or business.
- I can prove that I hold a return ticket, hotel reservation and at least 50 $ per each day of my stay.
- I have a valid Supporting Document (Valid Visa OR valid residence permit from one of the Schengen Countries, USA, UK or Ireland). E-visas are not accepted as supporting documents.
- My passport covers the period that I will be staying in Turkey.
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Items on global tourism agenda
  Connectivity, travel facilitation

Focus on sustainability
"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities"
"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities"
"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities"
Sustainable Tourism: putting together

- Economic
- Social
- Environmental

- Visitors
- Industry
- Host Communities
Sustainable Tourism: a simplified complexity...
Who is going to manage it?...and how?
Who? Three (3) players!

Governments
Who? Three (3) players!

Governments

Businesses
Who? Three (3) players!

- Governments
- Businesses
- Communities
How?
How?
Policy level: Governments on sustainability

very long term project – but still cash benefits
Policy level: Business and sustainability

First things First
Policy level: Communities and sustainability
Indicators level: to measure ...
Need help? UNWTO is here!

- Program for Sustainable Development of Tourism
- Policy Guidelines & Tools
- Climate Change
- Ecotourism
- Rural & Community based Tourism
- Initiatives & Certification Systems for Sustainable Tourism
UNWTO Actions

World Tourism Day 27 Sept 2013
TOURISM & WATER
Protecting our Common Future
UNWTO Actions

2nd UNWTO Training on Tourism and Biodiversity

Understanding Tourism Trends and Biodiversity Conservation for Innovative Products and Marketing

Wadden Sea Biosphere Reserve of Schleswig - Holstein (Germany),
14-26 April 2013
UNWTO Actions

REMEMBER

RESPECT LOCAL CULTURE
BUY LOCAL
SAVE ENERGY
USE PUBLIC TRANSPORT
PROTECT HERITAGE
Lonely Planet titled Pakistan, ‘The Next Big Thing’
Workshop on Pakistan Tourism

Georgios Drakopoulos
UNWTO Expert

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