Keywords: mountain environment, biodiversity, tourism, ecotourism, trekking, Karakoram, Hindukush, Chitral, Pakistan.

This document has been divided into three parts. The first part is below.

1.0.0. Introduction
In Pakistan, the National Tourism Policy and the National Conservation Strategy emphasize the crucial interdependence between tourism and the environment. Tourism has a significant impact upon the physical and social environment, while, at the same time, tourism's success depends on the continued well-being of the environment. Because the physical and social environment constitutes the resource base for tourism, tourism has a vested interest in conserving and strengthening this resource base. Hence, conserving and strengthening biodiversity can be said to hold the key to tourism's success.

The interdependence between tourism and the environment is recognized worldwide. A recent survey by the Industry and Environment Office of the United Nations Environment Programme (UNEP/IE) shows that the resource most essential for the growth of tourism is the environment (UNEP 1995:7). Tourism is an environmentally-sensitive industry whose growth is dependent upon the quality of the environment. Tourism growth will cease when negative environmental effects diminish the tourism experience.

By providing rural communities with the skills to manage the environment, the GEF/UNDP funded project "Maintaining Biodiversity in Pakistan with Rural Community Development" (Biodiversity Project), intends to involve local communities in tourism development. The Biodiversity Project also recognizes the potential need to involve private companies in the implementation of tourism plans (PC II: 9). By making clear the direct linkage between the well-being of the environment and the success of tourism, both local communities and private business will realize their direct economic incentive to conserve biodiversity. It is biodiversity that attracts tourists in the first place.

2.0.0. Tourism in Chitral & the Northern Areas
Our survey of tourism in the high mountain regions of Pakistan (Chitral district of NWFP and the Northern Areas), indicates (with one major exception, the Baltoro Glacier) that tourism has not yet reached the level where its impact
could bring a decline in tourism levels. In other words, there is plenty of room for growth. Tourism is relatively undeveloped in these regions. Ironically, as one tour operator notes, this very underdevelopment is, for tourists, one of the most attractive features of the mountain region.

The primary concern for tourism in this region, as we see it, is how to develop without damaging the environment, which would bring about a decline in tourism and a loss in biodiversity. Or, to put it another way, how best to manage tourism so as to conserve biodiversity and maximize the income generation from tourism (i.e., how to optimize the tourism carrying capacity).

3.0.0. Methodology
This survey is based upon field visits to all valleys of Chitral and the Northern Areas. In towns, we collected data on hotels, food, and transportation. We met with community representatives in most areas and discussed economic and marketing considerations with stakeholders in all sectors. We met with most of the domestic tour operators/trekking companies and also representatives of the Tourism Division of the Ministry of Sports & Tourism, PTDC, and PIA. We interviewed many tourists and handed out questionnaires on ecotourism to foreign tourists. This survey is not intended to be statistically precise, but to present a general picture of tourism and the ecotourism potential within the Biodiversity Project area.

4.0.0. What Is Ecotourism?
Tourism that sustains the physical and social environment has come to be known as "ecotourism". The precise definition of this term remains ambiguous even within the tourism industry itself. However, ecotourism can be differentiated from traditional tourism in that ecotourism not only attempts to minimize the environmental impact of tourism, but also has as a goal that local communities and the physical environment will actually benefit from tourism. In its ideal form, ecotourism is a philosophy, an activity, a development policy and an environmental policy, all at the same time.

Because of the ambiguity of the term ecotourism, the usage of this term by the Biodiversity Project requires clarification. Ecotourism is a buzz-word: everyone knows that it is desirable, but it means different things to different people. Since ecotourism becomes operationalized in different ways by different stakeholders in tourism, rather than attempting to make one definition fit all, it is better for the stakeholders to develop their own definitions.

5.0.0. Environmental Codes of Conduct
The most widely accepted way for stakeholders to develop their own definition of ecotourism and to operationalise the definition is through developing environmental Codes of Conduct. The UNEP/IE, working from Agenda 21, the program of action agreed upon at the United Nations Conference on Environment and Development held at Rio de Janiero in 1992, recommends the
development of voluntary Codes of Conduct on the environment by all sectors involved in tourism. They conclude that self-regulation has advantages over direct government control, but caution that too many codes can be as dangerous as too few. The UNEP/IE concludes that codes function to preserve the environment on which tourism depends, preserve biodiversity, and reduce pollution.

The benefits of codes include:

- Improvement of the natural environment and of the sustainability of the tourism industry,
- Ability to attract tourists, who seek environmentally responsible forms of tourism,
- Support for local economy and infrastructure which catalyses further tourism development, and
- Improved quality of life for host communities.

In other words:

- Conservation of biodiversity through ecotourism,
- Enhanced marketing of ecotourism,
- Income generation at the local level through ecotourism, and
- Rural community development through ecotourism.

These benefits are totally compatible with the goals of the Biodiversity Project. Hence, our initial recommendation is that voluntary environmental Codes of Conduct for tourism be developed in Pakistan.

These codes must be positive, specific, and action-oriented. The UNEP/IE study recommends that all codes have these common features:

An overall commitment to the physical and human environment, acceptance of responsibility for environmental damage and corrective action where necessary, and rewarding of outstanding environmental performance; and cooperation with other sectors and stakeholders in tourism and conservation.

Working with all sectors to develop codes, IUCN can assure that the codes do not have conflicting messages, and are developed as the result of partnerships between tourism stakeholders. Because environmental codes for tourism also require implementation and monitoring, IUCN can work with stakeholders developing codes to assist in:

- Publicity and dissemination campaigns,
- Publications of all types,
- Provision of expert services to code signatories
• Provision of networks to improve communication between stakeholders,
• Organization of conferences and seminars for exchange of ideas,
• Provision of awards for outstanding environmental behavior,
• Organization of demonstration projects to set examples for others to follow, and
• Incorporating the reactions of people directly affected by the codes into evaluation of code effectiveness.

UNEP/IE’s most important conclusion is that an overall management strategy is needed to integrate all activities involved; code preparation, implementation, reporting, and evaluation. IUCN can play this central role.

In order to clarify how ecotourism applies specifically in each context and to frame further work on environmental code development, a summary of issues common to existing codes for each sector and a sample specialist activity code are in Appendix A.

6.0.0. The Stakeholders in Tourism
Both our survey and the UNEP/IE survey identify the following stakeholders in tourism: the tourists; the host communities; and the tourism industry, composed of private tour operators, hotel operators, airlines, and the governmental agencies that regulate their operation. For ecotourism implementation, all these sectors must be taken into consideration. Hence, we recommend that IUCN broaden its conception of tourism to include the full dynamic range of interaction involving all stakeholders.

6.1.0. Tourists
The Terms of Reference (TOR) for this survey, under “Classification of Tourists/Target Groups”, states; "according to tour operators, the current tourist traffic visiting the project area can essentially be divided into four main groups (i.e. groups, individuals, specialists, and the ecotourists)." The TOR goes on to define these; "the group is a number of persons travelling together as a couple or as a larger group, the individual travels by him/herself, the specialist is the tourist who comes for a unique, specialized activity (e.g., mountaineering), and the ecotourist is the tourist who comes to enjoy a particular nature-related activity."

We find these classifications misleading and inappropriate for marketing and tourism development. For example, an "individual" may also be a "specialist", and a "group" may consist of "ecotourists". Ecotourism cannot be limited to just nature-related tourism. All tourists, foreign and domestic, can and should be ecotourists. Ecotourism packages (again, a problematic term) are simply another tourist activity and/or prearranged itinerary that can be marketed to certain segments of tourists (see Ecotourism Activities and Marketing & Promoting Ecotourism below for more on this topic).
A similar breakdown of tourists is found in "Survey Report on Ecotourism in Northern Areas" by M. Jaffar, IUCN Biodiversity Project, Gilgit. The categories in this report are: institutional tourists, who utilize the services of a tour operator; and non-institutional tourists; who include mountaineers; trekkers; backpackers; researchers, hikers; students, and professionals. Again, these classifications are misleading and inappropriate for tourism development and marketing, and are not discrete. For example, all mountaineers attempting summits over 6000 metres are required to hire the services of a licensed tour operator/trekking company. According to these categories, they are both institutional and non-institutional.

We find it most useful to place all tourists into two categories: Tourists who are travelling on fixed itineraries arranged through domestic tour operators/trekking companies; and -- tourists who are travelling independently.

These two categories can be further divided into foreign and domestic tourists. A careful study of which tourists are would be appreciated. Such a study should indicate how many foreign tourists to the Northern Areas and Chitral are on prearranged itineraries booked with tour operators abroad who work with Pakistani tour operators. It should also indicate how many total foreign tourists visit Chitral, Gilgit, and Skardu each year; how many visit Hunza and Gojal; and how many pass through Sost immigration. Further it should indicate the gender, nationality, and length of stay for foreign tourists. Such a study should also provide the same information for domestic (Pakistani) tourists. We present the available information below.

6.1.1. Demographics
The News, April 28, 1995 reported a total of 50,000 foreign tourists to Pakistan in 1994. The source of their figure was not indicated. This figure for all Pakistan is 10% lower than the figure given in the above mentioned "Survey Report on Ecotourism in Northern Areas". That report is self-contradictory and clearly overestimates the total number of tourists. It states that according to tour operators, over half of all tourists utilize the services of tour operators, both in Pakistan and abroad. Yet the report clearly indicates the vast majority of tourists to be independent tourists. The overall numbers appear so inaccurate as to be essentially useless. The methodology of the computation of tourist numbers is not specified; hence it is difficult to precisely identify methodological errors of the estimate. However, it is evident that the total numbers were obtained by adding the numbers of the several categories. This counts some tourists more than once and inflates the total number. For example, the 1994 total number of foreign tourists, 55,000, was arrived at by adding backpackers, researchers, hikers, students, and professionals, 41,640; trekkers, 8250; mountaineers, 850; and tourist flow to China 4260. Obviously, the same tourists were counted in several categories. For example, a 'backpacker' who went trekking and then went to China would be counted
three times. To balance these inflated figures, we present additional data below.

Of the six districts included in our survey (ie, Chitral, Ghizar, Gilgit, Diamir, Baltistan, and Ghanche), Gilgit receives by far the greatest number of tourists, both foreign and domestic. Baltistan and Ghanche districts are a distant second and Chitral third.

6.1.1. a. Chitral District Tourism
All foreigners must register at the Chitral FRO and receive a Temporary Registration Certificate. Hence, the following statistics are highly accurate. Any foreigners visiting the Kalash valleys for more than seven days must also request permission from the Deputy Commissioner (DC) in Chitral. Officials in Chitral agree that at least 75% of all tourists, both foreign and domestic, visiting Chitral also visit the Kalash valleys. Most tourists to the Kalash valleys visit Bumboret Valley followed by Rumbur, with Birir Valley a distant third.

(Chart of Foreigners registered at SP's office in Chitral) (Chart of Foreigners registered in Chitral by Nationality and as % of total tourists in 1994)

6.1.1. b. Ghizar District Tourism
The police check post at Chumarkhan, east of the Shandur Pass, near the village of Barsat, estimates that in 1994 3500 foreign tourists went through the check post. On August 25, 1995, we counted 650 to 700 foreign tourist entries in their register book. Most of the domestic and foreign tourists passing this check post are going to and from the well-known Shandur polo tournament, usually held in July. Other tourists through this check post are travelling by jeep over the Shandur Pass between Gilgit and Chitral. We estimate that almost all tourists visiting Ghizar merely pass through en route to the Shandur Pass or Chitral. A rough estimate of tourist numbers is 1000 annually, visiting locations off the main Gilgit-Chitral road.

6.1.1. c. Gilgit District Tourism
Gilgit receives the bulk of tourist traffic, because of its key location on the KKH. The doubling of foreign tourist numbers in registered at Gilgit in 1986 is a result of the opening of the Khunjerab Pass on the KKH between China and Pakistan.

(Chart of Foreigners registered at SP's office in Gilgit. Published in "Kashgar to Islamabad: The Impact of the Karakoram Highway on Mountain Society and Habitat", Scottish Geographical Magazine by Nigel J.R. Allan) (Chart of Individuals registered at Sost Immigration)

These immigration figures show a steady flow of tourists, including both independent tourists and those on prearranged tours. Two thirds of all foreign tourists to and from China cross in July, August, and September, with August the peak month. About 50% of all Pakistani tourists to and from China cross in
July, August, and September, with August the peak month. It is interesting to note the number of Pakistanis travelling to and from China. These individuals are almost exclusively males, and most are travelling on trade, to purchase Chinese goods for resale in Pakistan. By sheer number, they contribute significantly to the local hotel economy (see Economics below).

The 1986 Gilgit registration figures and the 1986 Sost immigration figures show that approximately 37% of tourists reaching Gilgit in 1986 traveled to or from China. Presuming the same ratio continues, this would indicate 11,500 foreign tourists in Gilgit in 1994. In general, at least, but less than ¼ of all foreign tourists visiting Gilgit travel to or from China. Although we do not have figures, we estimate that almost all tourists visiting Gilgit also visit Hunza. In 1989, the only year for which records are available, 136 foreign independent trekkers arrived in the remote village of Shimshal, in Gojal.

6.1.1.d. Diamir District Tourism
Diamir District researchers with the Pakistan-German Culture Area Karakoram (CAK) project estimate 200 to 250 foreign trekkers to Fairy Meadows and 100 to 150 foreign trekkers to the Rupal Valley in 1994. Both areas are next to Nanga Parbat, the only significant tourist destination in Diamir district. All tourists travelling on the KKH between Gilgit and Islamabad pass through Diamir, but few spend the night. Small percentage stops for tea or a meal at one of the several hotels in Chilas.

6.1.1.e. Baltistan and Ghanche District Tourism
Baltistan tourism focuses on trekking and mountaineering. In 1994, 766 foreigners, including trekkers and mountaineers, visited the Baltoro Glacier. This area receives 70% to 75% (ie, 71% in 1994) of the regulated foreign tourism in Pakistan. Regulated foreign tourist means tourists who are required to obtain a permit from the Tourism Division of the Ministry of Sports & Tourism. All such tourists are also required to utilize the services of a licensed domestic tour operator/trekking company. However, other non-permit areas of Baltistan are equally popular with foreigners. The Biafo Glacier received about 200 trekkers in 1994. Villagers in Hushe, in the Hushe Valley of Ghanche District, estimate 1000 trekkers each summer visit Hushe.

These three areas (ie, the Baltoro Glacier, the Biafo Glacier, and the Hushe Valley) receive almost all the trekking and mountaineering tourism in Baltistan. All the Baltoro tourists, whether trekkers or mountaineers are non-independent, since they are required to use the services of a licensed domestic tour operator/trekking companies. Tourists to the Hushe Valley and the Biafo Glacier are not required to use the service of a licensed domestic tour operator/trekking company, although some do. We estimate that approximately ½, or 1500, tourists visiting these three main areas in Baltistan are independent. Another 1500 are on pre-arranged tours, of whom ½ visit the Baltoro Glacier.
Additionally, some tourists don't trek or climb. They mostly stay in Skardu and visit nearby Shigar and Satpara. The tourists on pre-arranged itineraries stay in either the Shangrila resort at Kachura, outside Skardu, or at the PTDC-run K2 Motel. Independent tourists stay in budget hotels in Skardu. We estimate perhaps another 2000 tourists who do not trek or climb visit Baltistan. Hence, our total estimate of foreign tourists visiting Baltistan is about 5000. Because Baltistan is a sensitive area, police at check posts question all Pakistani citizens coming to Skardu. Hence, the number of domestic tourists visiting Baltistan is low.

6.1.2. Summary of Demographics
From all these available figures, a more balanced picture of tourist numbers emerges. We estimate the total number of foreign tourists visiting the Northern Areas and Chitral annually to be no more than 50% of the figures given in the above-mentioned "Survey Report on Ecotourism in the Northern Areas" (i.e., roughly 20,000 to 25,000 per year). Of course, some tourists visit all three main towns: Chitral, Gilgit, and Skardu, so the total number may be even lower. However, for the purpose of ecotourism potential, it is appropriate to consider tourists arrivals in each area.

Of these 20,000 to 25,000 tourists each year, we estimate 25% to 30% (i.e., 4000 to 8000) are travelling on fixed itineraries arranged through tour operators. The remainders are independent.

Of the 27,000 domestic tourists reported in the above mentioned survey, most are small businessmen travelling through Gilgit to Kashgar for trade. Their impact is concentrated along the KKH. However, the Kalash valleys in Chitral receive significant domestic tourism probably equal (but no more than) the number of foreign tourists (i.e, 3000 per year). Skardu receives fewer domestic tourists than foreign tourists, perhaps 1000 to 1500 per year.

6.2.0. Host Communities
This group of stakeholders in tourism comprises the local residents who interact directly with tourists. They are the logical recipients of tourism's benefits as well its negative impact. As with all types of development, the local population must perceive tourism as positive if tourism is to succeed and grow. The potential for direct economic benefit to host communities is great.

Host communities also carry an obligation to enhance the tourist's experience. The relationship between tourist and host is one of dynamic interaction, which must include open communication, and a clear statement of needs and expectations. Recognition of the dynamic quality of host-guest relationships, based upon Islamic principles of hospitality, is essential for positive growth and ecotourism. A number of community meetings have already been held, and useful generalizations can be drawn from them. From these generalizations,
specific actions can be formulated. Grassroots NGOs, focusing on environmental concerns also add useful input. See Appendix I for a listing of these grassroots organizations.

In Baltistan, villagers from Hushe and Askole presented their concerns about tourism to the IUCN-sponsored workshop on the Central Karakoram National Park. People from seven villages adjacent to the Khunjerab National Park have formed the Khunjerab Village Organization to represent their views. Kalash village representatives expressed their views at the Third International Hindukush Cultural Conference. In both Hunza and Skardu, signs posted in the bazaar urge tourists to respect local behavioral norms and to dress in an inoffensive fashion. Key issues concerning tourism common to all are: retention of grazing rights; preservation of fuelwood resources; water pollution and garbage accumulation from tourism; community participation in tourism development; direct economic benefit to communities from tourism; and respect for local cultural expression and values.

Any area selected for inclusion in the biodiversity project should be assisted by IUCN and cooperating partner NGOs to develop Codes of Conduct for host communities.

6.3.0. Tourism Industry
The tourism industry consists of both the private and public sectors. Within these sectors, each stakeholder has its own role. IUCN falls into this grouping as part of the private sector. As a lead organization in biodiversity conservation, IUCN can lobby with public sector agencies of the Government of Pakistan (GoP) to promote ecotourism.

6.3.1. Private Sector: the private sector groups involved in tourism are:
6.3.1. a. Tour Operators
The role of tour operators should be emphasized, because they mediate between the local level and the foreign/domestic tourist level. Tour operators are an economically sensitive sector that responds quickly to maximize business earning potentials, and to promote growth in tourism and avoid negative impressions that decrease tourism.

Domestic Tour Operators/Trekking Companies (See Appendix B) -- Tour Operators Abroad (See Appendix C) -- Hotel Operators (See Appendix D) -- Transport Operators (See Appendix E) -- Larger NGOs, that work with host communities on the environment and tourism. These larger NGOs, as non-profit, policy-oriented organizations, can help organize ecotourism training and information for the three for-profit groups within the private sector. NGOs active in Chitral and the Northern Areas include: AKRSP; IUCN-Pakistan; WWF-Pakistan; The Alpine Club of Pakistan (tel (051) 62918), Lt Gen G S Butt, 288 Peshawar Rd, Rawalpindi, operates a Mountaineering Centre in Naltar, where they train and certify mountain guides; and Adventure Foundation of Pakistan
No 1 Gulistan Colony, College Rd, Abbottabad, founded by retired Brigadier Jan Nadir Khan, promotes special-skills training and Outward-Bound style adventures for young Pakistanis. They also train mountain guides, and operate the annual Baltoro Glacier clean-up expedition, using funds released from the Tourism Division of the Ministry of Sports & Tourism.

6.3.2. Public Sector
Public sector agencies (GoP) that regulate tourism affect the private sector of the tourism industry, as well as tourists and host communities. These are:

6.3.2. a. Tourism Division of Ministry of Sports & Tourism, Deputy Chief of Operations, Tourism Division (tel 820856 and 827015), F-7/2, 13-T/U Commercial Area, Room 8, Islamabad, at the south-west end of Jinnah Market. They are open from Sunday to Thursday from 9 am to 1 pm and 2 to 5 pm. They publish two brochures Trekking Rules and Regulations and Mountaineering Rules and Regulations. All tourists with a restricted area destination must obtain a permit from this office and attend briefing and debriefing meetings here. Tourism Division determines which areas are in open, restricted, or closed zones, and sets maximum wages for porters in all areas. Because all tourists visiting restricted areas must also utilize the services of a licensed domestic tour operator/trekking company, Tourism Division is directly involved not only with tourists, but with domestic tour operators.

6.3.2. b. Pakistan Tourism Development Corporation (PTDC) is the only public sector hotel and tour operator. PTDC is the promotional arm of the Tourism Division of the Ministry of Sports & Tourism. They run several top-end motels; maintain tourist information centres in several towns that offer brochures and advice, hold priority seats for tourists on Northern Areas flights, and book vehicles for hire. Pakistan Tours Ltd. (PTL) is a subsidiary of PTDC and makes bookings for domestic flights, jeeps, hotels, and tours. PTDC owns and operates several hotels in Chitral and the Northern Areas. Their offices are:

PTDC Head Office, P.O. Box 1465, Islamabad 44000; F-7/4, Street 61, House 2 (tel (051) 811001-4; fax 824173; telex 54356 PTDC PK)

PTDC Motels Booking Office, F-7 Markaz (south-east side of Jinnah Market), Bhitai Rd, Block 4-B, Islamabad (tel (051) 218232, 812957, and 819384; fax 218233; telex 54356 PTDC PK); open from 9 am to 1 pm and 2 to 4 pm and closed Friday; except open seven days per week June 1 to August 14.

PTL Head Office, Flashman's Hotel, Room 24, The Mall, Rawalpindi (tel (051) 581480-5 and 563038; fax 565449; telex 5620 FH PK) and Metropole Hotel, Club Road, Room 266, Karachi (tel (021) 511776; telex 23823 PTDC PK)

6.3.2. c. Pakistan International Airlines (PIA) is the only airlines serving Chitral and the Northern Areas.

6.3.2. e. Regional Finance Development Corporation (RFDC) finances hotel construction.

6.3.2. f. Northern Area Public Works Department (NAPWD) operates resthouses in most Northern Areas towns and larger villages where tourists can stay.

6.3.2. g. The Ministry of NWFP operators Construction and Works (C&W) Resthouses in most NWFP towns and larger villages where tourists can stay.

7.0.0. Resource Base for Tourism
The resource base for tourism is the physical and social environment. The resource base in Chitral and the Northern Areas is great, but not well-known. Even to domestic tour operators/trekking companies. Wise use of this resource base holds the key to future income generation. If the resource base is lost, tourism is lost. Our survey of tourists shows that the quality of both the physical and social environment is the single most important factor in whether or not tourists have a positive experience. In order to better understand the variety and richness of this resource base, a valley-by-valley analysis of the resource base for tourism in Chitral and the Northern Areas is presented in Appendix F. This analysis is based on our field visits to each valley. The criteria we include in the analysis are:

- outstanding natural features;
- outstanding cultural features;
- outstanding biological features (including botanical features);
- activities for tourists; and
- accessibility.

This analysis can be used to help select areas for immediate attention. Areas with outstanding features (e.g., Karambar Lakes), but difficult access, are less in need of immediate attention by the Biodiversity project than areas presently receiving significant tourist impact due to ease of access. Some areas with outstanding features and easy access (e.g., Chitral Gol National Park and Tooshi Gol in Chitral) are rarely visited by tourists and could be considered by the Biodiversity Project.

8.0.0. Economics
Tourism is the ninth largest earner of foreign exchange in Pakistan, according to the Tourism Division of the Ministry of Sports and Tourism. In Chitral and the Northern Areas, which are the major destinations for most foreign tourists, it is probably the largest earner of foreign exchange and one of the largest components of the economy. Villagers are quick to point out that they have no
industry besides tourism, which provides widespread, though largely seasonal employment opportunities. In some areas, such as Gojal in the upper Hunza River valley, at least one male member of each household finds seasonal work in tourism. In the Hushe Valley of Baltistan's Ghanche district, tourism has become so important that villagers have altered their grazing practices to better accommodate tourism.

The economic benefits of tourism in Chitral and the Northern Areas are at present overwhelmingly positive. We never encountered any persons who were opposed to tourism. Some people wanted to modify tourist behavior, but no one wanted to stop tourism. Villages that once had a more antagonistic attitude toward tourism are now looking to make changes to attract tourists. Nagyr is a good example of this, where the roads are recently paved, new hotels are under construction, and villagers are cooperating to make tourists more welcome. In villages with different religious communities, such as Naltar in the lower Hunza Valley, the communities have established systems of cooperation to ensure the equal distribution of earnings from tourism. Economic benefits are powerful motivators for change and development throughout Chitral and the Northern Areas. Tangible economic benefits come from:

- Employment as porters, cooks, and guides; in hotels; and in transportation;
- Small business ownership of transport, hotels, shops, and tour operators and travel agencies; and
- Increased business activity due to economic input into local economy by tourism.

Tourism carries costs as well. Although everyone is happy to see more tourists, everyone is not glad to see piles of trash at camp sites, trees cut down, toilet paper strewn along trails, heaps of plastic bottles behind hotels, villagers angry with tourists for wearing indiscreet clothing, and trekkers arguing with guides and porters over wages. Tourists, local people, and tour operators/trekking companies need to be aware of these problems and learn how to deal with them.

Presently tour operators and host communities meet annually to set wages for labor. Tour operators also meet with hotel operators and transport operators to set costs for each season. These existing dialogues could be widened, under prompting from NGOs, such as AKRSP, to include development of sector based Codes of Conduct and a mechanism for sharing equitably the cost of minimizing the negative impacts of tourism. This should be viewed as an investment to preserve and sustain the essential resource base for tourism.
Below we present data to help quantify the economic inputs of tourism. These are organized to show how much the different categories of tourists spend, with a breakdown of their spending.

8.1.0. Cost of Touring
(Chart of Cost of Touring (Self-arranged) - Daily cost per person in US$)
We estimate that most foreign tourists fall into the middle category, with approximately equal numbers on both the top end and bottom end (i.e., 50% in the middle and 25% each in the top and bottom). Hence, the middle figures provide an average per day expenditure for all foreign tourists on self-arranged, independent itineraries.

Tourists on pre-arranged itineraries booked through tour operators are mostly top end tourists. No matter what they paid to the tour operator, the same amount flows into the local economy. Although tour operators retain a significant percentage of the money paid by their clients, and overseas tour operators retain a larger percentage, pre-arranged itineraries support the top end hotel and transport sectors. Additionally, these tourists generally spend more in local shops that sell souvenirs to tourists. Hence, their economic input is perhaps underestimated, as it is difficult to quantify their shopping and the intangible benefit of the presence of high-end (ie, up-scale) tourism on Pakistan's image abroad.

As an example of the economics for the categories of tourists in one specific activity, we present below a detailed discussion of trekking. These figures provide a basis for generalizations about all tourists.

8.2.0. Cost of Trekking
Costs of trekking vary significantly with the style of trekking, which we categorize as self-arranged and pre-arranged trips. Rates and wages are valid as of October 1995. Expect an annual inflation rate of about 10%. However, the actual amount reaching the local economy shows less variance.

Self-arranged trips: Self-arranged trips are divided into two categories: backpacking; and open-zone treks with a locally hired trek crew.

Backpacking includes those who carry their own back pack or perhaps hire one porter, buy food locally, bring their own equipment, and use local transport to trail heads. Most independent backpackers follow this style.

When trekkers hire a special jeep, guide, cook, trek crew, and/or porters on their own, the total cost increases surprisingly. Often this style of trekking is more expensive than staying in hotels and eating in restaurants.
Pre-arranged trips: Pre-arranged trips are divided into two categories: those arranged through (domestic) trekking companies; and those arranged through a tour operator abroad.

Trekking companies in Pakistan provide a range of services which can include the cost of a guide, cook, trek crew, porters, food, equipment, transport to and from the trail head, hotels, and permit fees and insurance premiums, if applicable. The trekker pays a lump sum directly to the trekking company, which varies depending upon the level of services requested.

Tour operator abroad provides all services in Pakistan and usually that of a Western tour leader. The trekker pays a lump sum to the tour operator, which usually does not include personal expenses, international airfare, visa fees, and insurance. The tour operator abroad then pays a lump sum for outfitting directly to the (domestic) trekking company. Note that although the percentage reaching the local economy decreases for pre-arranged trips, the actual amount increases.

8.3.0. Revenue in Local Economy
The input to the local economy largely comes as wages for labor, cost of hotels and food, and as cost of transportation as detailed below.

8.3.1. Labor
The wages earned working as a guide, cook, or porter for trekking and mountaineering are a major input to the local economy.

(Chart of Ratio of Labor to Trekker/Party Category # Porter)

The wage input per backpacker runs between US$3 to US$7 per backpacker daily, or on the average about US$5 per backpacker daily. Those who hire a guide or trek crew provide significantly greater local economic input as wages.

(Chart of Cost of Labor (* as per 1995 Tourism Division regulations))

Because portering is such a significant wage earning, it is a desirable seasonal occupation with much competition for porter work. In Skardu, rules have been established by local authorities to resolve disputes over porter employment. When an expedition or trekking parties are in town, hundreds of prospective porters crowd around the gate of the PTDC K2 Motel, where many trekkers and climbers stay. Skardu police supervise the hiring process to control disputes. The wages earned by one household member working as a porter for one or two groups can effectively double an annual household income.

8.3.2. Hotels & Food
Hotels and food are also major economic inputs from tourism. Hotels and restaurants provide employment and purchase food and supplies locally. Below are average rates for three categories of hotels in several towns in Chitral and the Northern Areas.
8.3.3. Transportation
Transportation is the third major source of local economic input from tourism. Almost every town in Chitral and the Northern Areas has several privately-owned jeeps, which serve as cargo jeeps to move town residents and goods to and from regional market centers. Tourists rarely utilize this common form of local transport. In the main towns and in Hunza, many private for hire tourist jeeps are found, and suzukis and taxis operate in the main towns. Private minivan and coach service along the KKH and the Gilgit-Skardu road is another fast-growing transport sector dependent upon tourism. (Chart of Cost of Transportation by type of transport)

8.4.0. Average Length of Stay - Trekkers
The following tables summarize the number of standard trek routes, the average length per trek, and the range of trek lengths for each region in the survey area. Data in peak months are in bold. See Appendix G for the name of the trekking routes, season per trek, length per trek by valley in Chitral and the Northern Areas. It is important to note the peak season for ecotourism planning purposes. This data can be combined with economic data (see Economics) to provide estimates of current input to local communities from trekking for each area. When demographic data is also incorporated, even more precise estimates of input can be made. For example, although Baltistan has fewer trekkers than either Chitral or Hunza, treks in Baltistan are longer, and Baltistan tourists are mostly trekkers. Hence, the economic benefit and importance of trekking in Baltistan is greater than in Hunza.

(Chart of Average Length of Trekkers' Stay - Chitral)
(Chart of Average Length of Trekkers' Stay - Ghizar)
(Chart of Average Length of Trekkers' Stay - Gilgit, Diamir & Kaghan)
(Chart of Average Length of Trekkers' Stay - Hunza River Valley)
(Chart of Average Length of Trekkers' Stay - Baltistan)
(Chart of Summary by region -- largest to smallest)

9.0.0. Ecotourism Activities
The TOR for this survey mentions “ecotourism activities” as activities “which can either be promoted as an individual activity or as a package”. Viewed this way, ecotourism is a commodity to be promoted, packaged, and sold. This is an unnecessarily narrow definition of ecotourism that constricts the range of activity associated with ecotourism. Starting instead from the broader concept of ecotourism as a way for tourists, host communities, and the tourism industry to act and interact, the potential for useful activities that sustain the resource base for tourism and conserve biodiversity is greater. The transformation of tourism into ecotourism for all three sectors involved is the goal. Formulation of voluntary Codes of Conduct for each sector will begin this process. Meetings in conjunction with formulation of codes will raise the awareness of ecotourism
among the stakeholders, and many activities will spontaneously suggest themselves to the stakeholders. Stakeholders will then appreciate assistance in implementing specific activities.

Within the broader concept of ecotourism, not only activities that are income generating, but also activities that conserve and strengthen the resource base for ecotourism should be included. Many of these activities are actually investments that will bring a future return in the form of increased tourism and increased tourism carrying capacity.

Below we present “ecotourism activities” on a sector basis. Some activities should be undertaken jointly by stakeholder sectors. Some activities are of special relevance to specific locales, and are so identified.

9.1.0. Tourist Activities
Tourists are the ultimate “consumers” of ecotourism. Most activities are organized with them in mind: to enhance their experience; to minimize their impact; and to increase their economic input into the local economy. However, tourists themselves, as stakeholders in tourism, need to know how to be ecotourists. Codes of Conduct facilitate this, through informing tourists how to act appropriately and responsibly.

9.1.1. Pollution & Trash Control
Our survey shows most tourists identify pollution and trash as the major problems they encounter in Chitral and the Northern Areas. Recycling programs, trash disposal programs, and clean-up campaigns are activities that all three sectors can and should participate in. Hence, establishing recycling programs and trash disposal facilities so tourists can participate would be positive actions. In certain high-volume areas, such as Gilgit, Hunza, and the Baltoro Glacier, such facilities are an immediate remedial necessity, as the problem is already critical. The construction of incinerators to burn garbage, especially in remote locations where removal is prohibitively expensive (e.g., Paiju on the Baltoro Glacier trek is one such site) is a solution proven effective in the Nepal Himalaya. Grassroots organizations willing to provide the labor for such activities should be supported and assisted to design, implement, and monitor such programs. Local administrations must also be involved.

9.2.0. Host Community Activities
9.2.1. Local Food Sales
Many activities for host communities suggest themselves. In areas where there is a surplus of fruit, jams and juices are already being sold. Additionally, in Gojal, with a good apple supply and a good electricity supply, hotel-keepers could easily learn to bake apple pies for tourists. This would increase revenue from the apple crop.
Other local foods, especially those that are a seasonal surplus during peak summer tourism, could be produced for sale. Host communities would require assistance to develop hygienic food handling techniques and packaging. Dried fruits, particularly apricots, are already being produced, largely through AKRSP-sponsored programs. Local bread (e.g., Hunza phitti, Gojal kemisdon) could also be sold. Dairy products have potential (especially dried cheeses and panir). Cooperation with stakeholders in the tourism industry (i.e., hotel operators and tour operators) will provide additional outlets for local foods. Currently, Pakistani traders travelling to Kashgar purchase local dried cheese (qurut) in Gojal from shepherds on the roadside.

9.2.2. Handicrafts
Handicrafts also suggest an activity to enhance income generation, especially among women. AKRSP Women Organizations (WOs) often have “Stitchery Trainings”. In Chitral, these are common in the Garam Chashma region. They are also established in Hunza and Gojal. Embroidery and weaving can be marketed in regional centers to tourists. A study of what products are most readily saleable would be useful. Our impression is that typical women’s hats, well-made, are desirable to tourists as souvenirs. In the Braldu Valley of Baltistan, women’s traditional hats (nathing) could be made for sale to the many trekkers and mountaineers visiting the Baltoro and Biafo Glaciers. Participation of women in the local economy is essential for village development where women’s earnings are recycled into better health and education in the village.

9.2.3. Alternative Fuel Generation & Energy Conservation
Improving energy efficiency and alternative energy sources are an important activity for host communities. Energy-efficient construction, such as the use of Trombe walls (i.e., a passive solar-heating wall), can be easily incorporated into construction of houses, hotels, or community buildings. Northern Areas Associates (Consulting Engineers and Planners) in Gilgit have already developed models. Solar water heaters have also been introduced into Chitral. Increased dissemination of these simple technologies would be a positive development. Tourists would be favorably impressed by the establishment of such environmentally sound technologies. New hotel construction in particular should utilize these. The continuing problem of how to provide hot water in an ecologically sound manner to tourists would be in part resolved through solar heating and the introduction of backburner stoves that utilize waste heat in the chimney for water heating. These reduce wood and electricity consumption.

9.2.4. Cultural Festivals, Museums & Architecture
Another activity for the host communities is the establishment of cultural museums and the scheduling of cultural festivals. Silk Route festivals, under the auspices of AKCS and Lok Virsa, are already being held in Hunza and Gojal. In Gojal, Wakhi cultural museums have been established in Gulmit, Passu, and Shimshal. These activities encourage local cultural pride and promote cultural
awareness among tourists. Tour operators can use them as destinations to
include in tour itineraries, enhancing Chitral and the Northern Areas as
interesting destinations.

Local residents should receive training in interpretation and display, to improve
the quality of museums and festivals.

New hotels and small scale lodges that include major elements of local design
would also enhance tourism for local communities and for stakeholders in the
tourism industry.

Notes to readers

The Mountain Forum would like to thank John Mock and Kimberley O'Neil for
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