

Industry Paper

Potential of Pakistan's Tourism Industry in Post-COVID-19 Pandemic Scenario

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Abstract: The travel and tourism industry has emerged as the engine of global economic and employment growth contributing a hefty US\$8.9 trillion or 10.3% to the global GDP and supporting 310 million jobs while earning US\$1.5 trillion in tourism exports. Pakistan is blessed with rich tourist attractions including diverse enticing landscape as well as archaeological, religious and cultural heritage. However, due to wars in Afghanistan spilling over into Pakistan and conflict with India as well as the government's disinterest, the tourism sector remains underdeveloped with a subpar growth. These issues are also reflected in Pakistan's dismal ranking (122nd. position) in the global competitiveness ranking. Over the last few years, the confluence of propitious developments — eradication of violent extremism, infrastructure upgradation under CPEC and Government's prioritization of the sector— has catapulted the tourism sector on a growth trajectory. Over the last 2-3 years, foreign tourism arrivals have scaled to nearly 1 million while the total contribution to GDP reached US\$ 16.7 billion last year. This paper found that the right policies for tourism could earn US\$ 27.5 billion for Pakistan while foreign tourist arrivals can also increase manyfold. The Federal government has taken bold initiatives to revamp the tourism sector by restructuring and empowering PTDC, constituting the National Tourism Coordination Board and introducing a comprehensive and well-designed National Tourism Strategy (NTS) to direct the revival of the tourism industry. To date, Pakistan has earned fabulous reviews and ratings by global tourism publications such as Conde's Nest, Forbes and British Backpackers Society and Pakistan finally seems to be making its mark on the global tourism radar. Sadly, the COVID-19 pandemic hit Pakistan's tourism industry like a bolt from the blue leading to the closure of multiple businesses and job losses. However, the quick containment of the virus and government's financial support has somewhat softened the pandemic's impact on the tourism industry. The partial recovery of the tourism industry can be achieved by adopting safety SOPs, focusing on sustainable tourism and encouraging domestic and youth tourism. Eventually, the tourism sector will recover to a large extent in the latter half of 2021 once vaccine is widely available. In the meanwhile, Pakistan tourism authorities seem unfazed and continue to diligently implement the National Tourism Strategy and lay down the spadework for reaping benefits of the global tourism recovery. This paper while taking note of suggestions in NTS has made recommendations that are in line with

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global best practices which will help complement NTS and catalyse the revival of the tourism industry. Notable suggestions include identifying priority tourism sectors and matching them with target markets, developing an umbrella marketing campaign with a tagline such as “Wonderful Pakistan”, as well as improving infrastructure such as access roads, airport and transport services, accommodation, recreation and sports facilities. Regular training courses to enhance the capability of the public sector who will be agents of change is also essential. Upgradation of training institutes through foreign collaborations, syllabus modernisation, inclusion of Work-Based Learning and the induction of foreign qualified faculty will go a long way in improving human resource deficiency. A customised PPP Framework to suit the needs of the tourism sector along with a well-incentivised investment policy offering favourable predictable tax policy, easy dispute resolution, one-stop approvals and easy credit facilities. Pakistan’s tourism authorities also need to establish a tourism database to record all tourist arrivals which will help in tourism management, planning and investment. The country also needs to embrace digital technology to showcase its tourism potential and attract foreign tourists. Lastly, enduring success in reviving the tourism industry will need a sustained focus and committed long-term approach from the federal and provincial governments.

Keywords: Tourism industry, Post-COVID-19 scenarios, Pakistan

Suggested citation: Mian, A. S. (2021). Potential of Pakistan’s tourism industry in post-COVID-19 pandemic scenario. *Asia-Pacific Journal of Innovation in Hospitality and Tourism*, 10(2), 103–133.

Introduction

The tourism industry, which comprises the travel and tourism (T&T) sub-sectors, has emerged as one of the most vital and thriving growth engine of world economy over the last few decades. According to World Travel and Tourism Council (WTTC), in 2019, the travel and tourism sector was the fifth largest sector in world economy, contributing US\$ 8.9 trillion, or 10.3% of the global GDP and supporting 330 million jobs (WTTC, 2019). According to United Nations World Tourism Organization (UNWTO) (2020a), international tourist arrivals in 2019 exceeded 1.5 billion contributing over US\$ 1.5 trillion to the global T&T industry.

Undoubtedly, the tourism industry is an important driver of socio-economic growth, employment generation, empowerment of women and local communities, nature and heritage conservation, skills development, and promoter of culture, art and handicraft. Pakistan is among the few countries that have diverse and abundant tourism attractions including varied alluring natural landscape as well as rich archaeological, cultural, religious and heritage sites. During the heydays of 1960s and 70s, Pakistan was a prime destination of foreign tourists and became part of the vaunted Hippie Trail. However, due to scourge of extremist violence, Pakistan’s tourism industry went into decline. However, in the last few years, a confluence of positive factors such as improvement in security situation, investment

in infrastructure under CPEC and the government's keenness to promote tourism, have opened up new opportunities for the revival and growth of Pakistan's tourism industry. This calls for a renewed focus on the tourism sector by the federal and provincial governments in collaboration with the industry.

In 2020, the COVID-19 pandemic, which disrupted all human activities, is proving particularly calamitous for the tourism industry and posing serious challenges to the sector's survival. In line with the global trend, authorities in Pakistan need to shield the nascent tourism sector from COVID-19's negative economic fallout while preparing the sector to seize the opportunity once the pandemic is brought under control.

Pakistan has a wide array of tourist attractions including diverse landscape and natural beauty as well as archaeological, cultural, heritage and religious attractions. However, Pakistan has not been able to harness its immense tourism potential due to low priority for the sector, weak tourism infrastructure, inadequate investment, and lack of favourable policies. However, the COVID-19 pandemic has presented another challenge that Pakistan's policy makers will have to account for while planning for the revival of the sector.

Thus, the current research developed the following research questions:

- Define the potential of the tourism industry in Pakistan in general and in economic terms;
- Determine the factors/constraints that are hindering the development and growth of Pakistan's tourism industry;
- Define the impacts and challenges of the COVID-19 pandemic in Pakistan and suggest modern approaches and policies for revival of tourism industry in Pakistan in post COVID-19 scenario

The research paper will attempt to define the potential of Pakistan's tourism industry in comparison with regional and global averages and by examining the various natural, cultural, heritage, and religious attractions. The study will also attempt to explain the reasons and constraints that have prevented the tourism industry from flourishing in Pakistan. The paper will also examine the impact of the COVID contagion on the tourism sector in Pakistan and globally and the challenges being faced by the industry. Lastly, approaches and prudent policies that Pakistan can adopt to revive the tourism industry in post-COVID scenario will also be suggested.

Background of the Study

Being a primary economic sector and much-loved human pastime, tourism is a deeply researched topic. However, in the context of Pakistan, there is a dearth of high-quality and in-depth research on tourism industry as the sector has suffered from

indifference and inattention. Lack of reliable data on the sector has been another hurdle in this regard. Anjum (2015) defined the tourism potential of Pakistan by listing major tourist attractions, analysed tourist traffic into Pakistan in comparison with the region, and enumerated challenges facing the industry in the context of overall regulatory and policy framework. The research had a narrow scope, relied mostly on secondary data and did not conduct any surveys to ascertain the opinion of tourists.

Baloch and Rehman (2015) in their research paper focused primarily on the potential of adventure tourism in Gilgit Baltistan mainly and cursorily, broad factors bedevilling tourism and recommended facilitating inter-South Asian Association of Regional Cooperation (inter-SAARC) tourism, particularly for religious and heritage tourism. Fakhar (2008) conducted an elaborate study on the subject focusing mainly on diagnosing the factors effecting the tourism industry. His approach was conducting interviews of domestic and foreign tourists who visited Pakistan enabling him to gain insight into tourists' perspective on Pakistan. Rana (2015) presented a useful analysis of the prevailing and past tourism policies highlighting shortcomings, which has added to the research literature. He conducted a detailed and systematic analysis of factors hindering the growth of the tourism industry and underlined terrorism, poor management and disinterest as key hindrances to the sector's growth. Rana's research though, was retrospective, rather than, futuristic in nature. Arshad, Iqbal and Shahbaz (2017) drew on the work of Rana (2015) but also amplified the causes that were impeding progression in the tourism sector. The researchers suggested improvement in law and order, health facilities, capacity building, professional education, promotion through media, destination and infrastructure development, policy formulation and implementation and public-private cooperation as key policy recommendations.

The current study differs from the previous studies in a number of ways. Firstly, the current context for the tourism industry in Pakistan has seen some propitious changes that warrants a fresh look at the industry; secondly, this paper will examine a new area — the impact of the unique but devastating pandemic on the tourism industry — which previous studies have naturally not examined.

Methods in Brief

A mixed method approach relying on secondary research and qualitative analysis was employed to analyse the various aspects of the research topic. Due to time limitations and resource constraints, secondary sources of data such as review of past research, published reports, and materials in local and international journals, industry and official websites were utilised as the main source of data for the preparation of this report. Further, there were 10 interviews of public officials and industry professionals which added value to the findings of this research.

Findings and Discussion

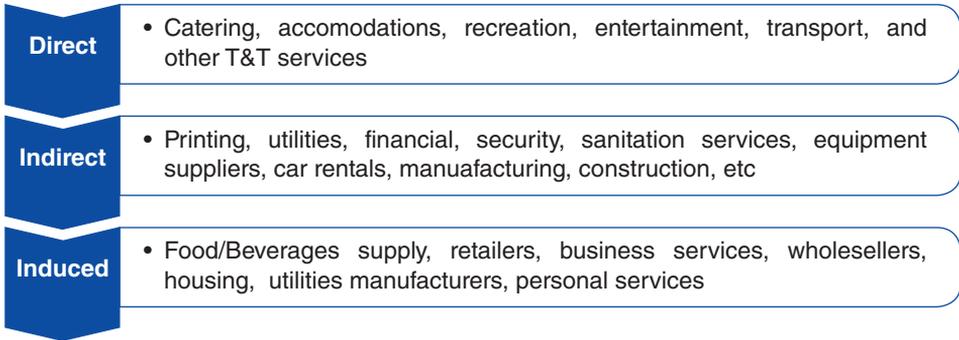
Section I gives an overview of the travel and tourism industry in Pakistan while also defining its potential in general and economic terms; Section II gives a brief roundup of past and present tourism policies including new initiatives while mainly focusing on factors that have constrained the growth of the tourism industry in Pakistan; and lastly, Section III looks at the impacts and challenges posed by the pandemic on Pakistan's tourism industry. The paper ends with conclusions and recommendations which include measures to deal with COVID as well as measures to address long-term weaknesses in the tourism sector to revive growth.

Section I: Potential of Tourism Industry in Pakistan

Tourism can be defined as the act and process of spending time away from home in pursuit of recreation, relaxation, and pleasure, while making use of the commercial provision of services. Mass tourism is a post-industrialization phenomenon which owes its ubiquity to vast improvements in air, road and rail travel, end of major conflicts and onset of peace, and rising incomes. However, tourism for wayfaring, education, business, and pilgrimage has been practiced at a limited scale since antiquity (Britannica, 2020a).

Significance of Tourism Industry in the Global Context

The tourism industry which is generally called travel and tourism (T&T) over the last fifty years has become a vibrant and important sector of the global economy. According to WTTC (2019), the T & T industry in 2019 contributed US\$ 8.9 trillion, or 10.3% to global GDP and supported 330 million jobs. T&T ranked the fifth largest sector in the global economy behind construction, financial services, health and retail sectors. International tourist arrivals have increased at an astounding rate since the mid-twentieth century. According to UNWTO (2020b), the number of international tourist arrivals registered a stupendous 60-fold increase from 25 million in 1950 to 1.5 billion in 2019 (US\$ 1.5 trillion receipts). In the context of total global tourism revenue, international tourism represents 28.7% of total receipts while domestic tourism accounts for 71.3% of total receipts. The tourism industry is considered an important driver of socio-economic development, foreign exchange and employment generation, local communities and women empowerment, nature and heritage conservation, skills development, and promoter of culture, art and handicraft. Tourism also helps improve a country's brand and image and promote world peace and understanding. The T&T industry has extensive linkages with other sectors of the economy and thus has a strong multiplier effect on economic growth. WTTC (2019) lists economic impacts of spending on tourism at Direct, Indirect and Induced Levels as illustrated in Figure 1.

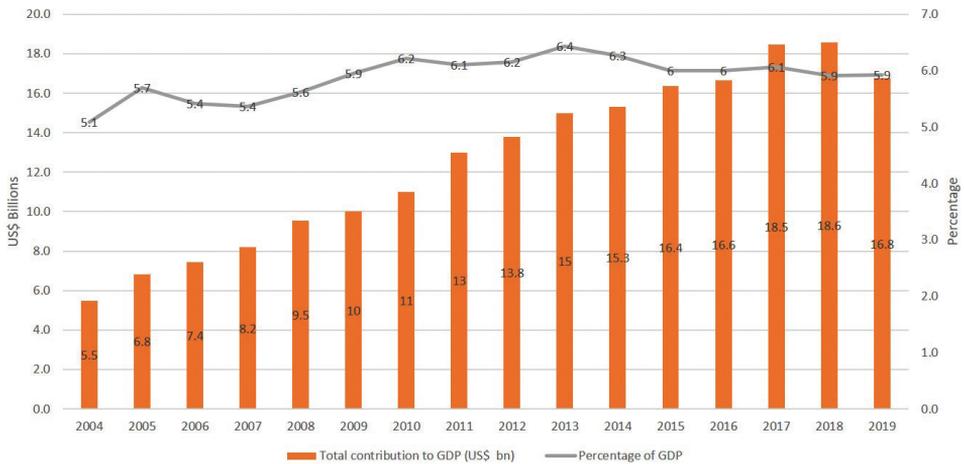


Source: WTTC

Figure 1. Economic value of tourism at three levels

Tourism Industry of Pakistan

According to WTTC (2019), tourism contributed US\$ 16.8 billion or 5.9% to Pakistan’s economy in 2019. The T&T industry supported 3.8 million jobs or 6.2% of total jobs in Pakistan. Over the last 17 years, the total contribution of T&T has been more or less constant as share of GDP at around 5.9% but in value terms, it rose from US\$ 4.1 billion in 2002 to US\$ 18.5 billion in 2017 before tapering off to US\$ 16.8 billion in 2019.



Source: WTTC

Figure 2. T&T’s total contribution to Pakistan’s GDP

While the total contribution of tourism industry includes many indirect and induced impacts, the direct contribution of the tourism industry in Pakistan was US\$ 5.1 billion in 2019 constituting 1.8% of GDP as shown in Figure 3.

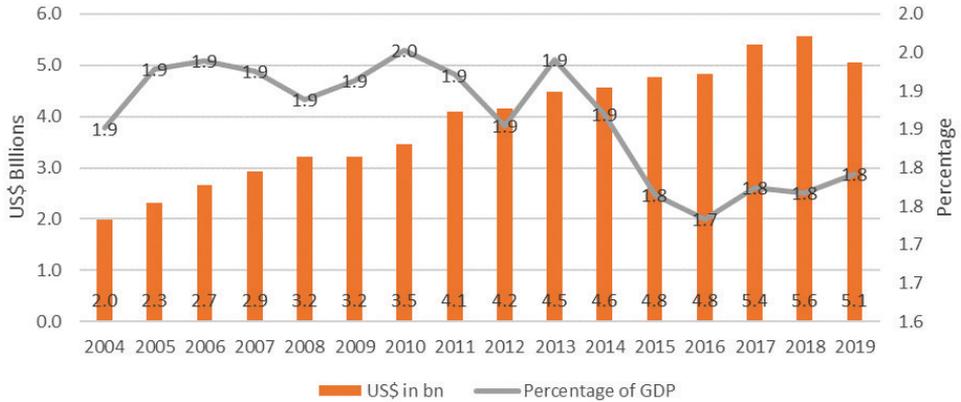
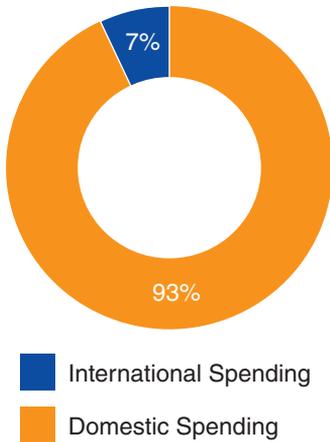


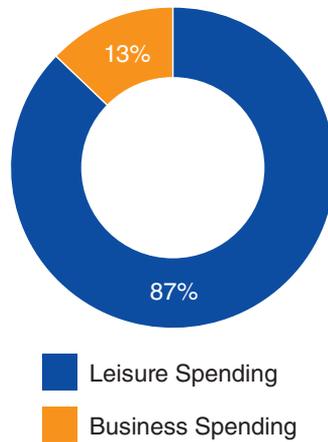
Figure 3. T&T's direct contribution to Pakistan's GDP

Domestic tourism had a 93% share in total tourism spending while international tourism had only a 7% share (global average: 30%). Leisure spending had a 87% share while business spending had a 13% share in total tourism spending.



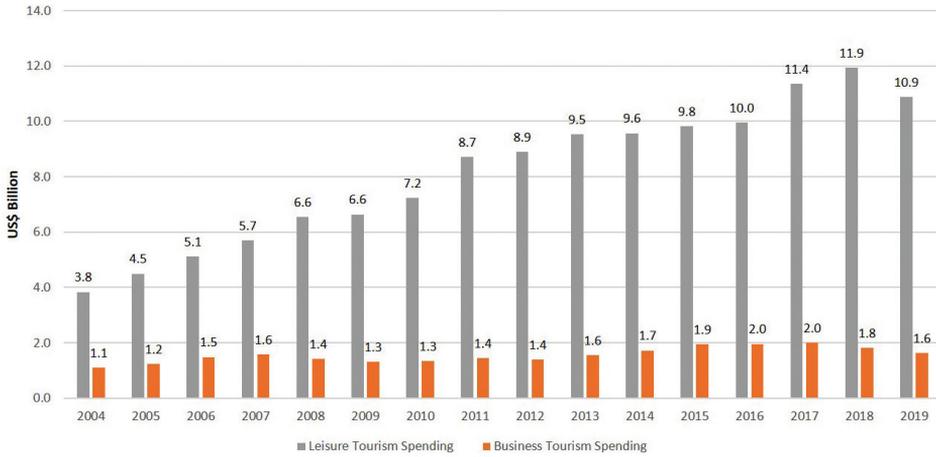
Source: WTTC

Figure 4. International vs domestic tourism (2019)



Source: WTTC

Figure 5. Leisure vs business spending (2019)

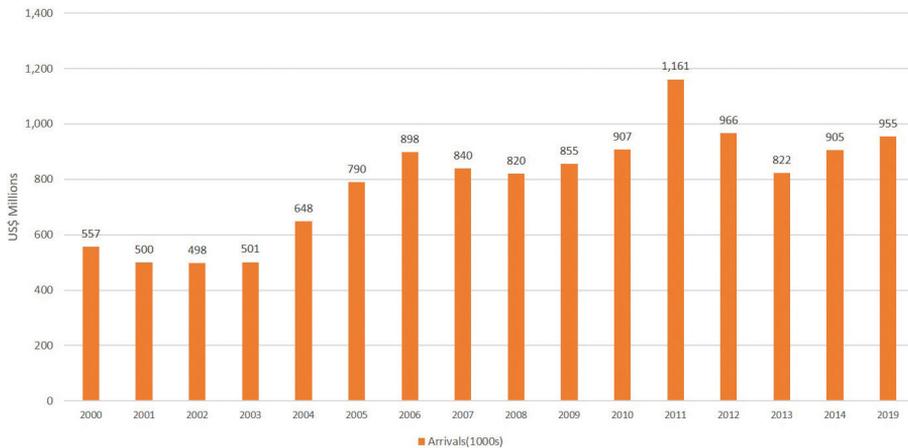


Source: WTTC

Figure 6. Leisure & business tourism spending (US\$ bn)

In 2019, Pakistan received 955,000 international tourist arrivals earning US\$ 852 million in foreign exchange (3.1% of total exports). However, Pakistan’s tourism earning from foreign tourists is much below the potential and global average.

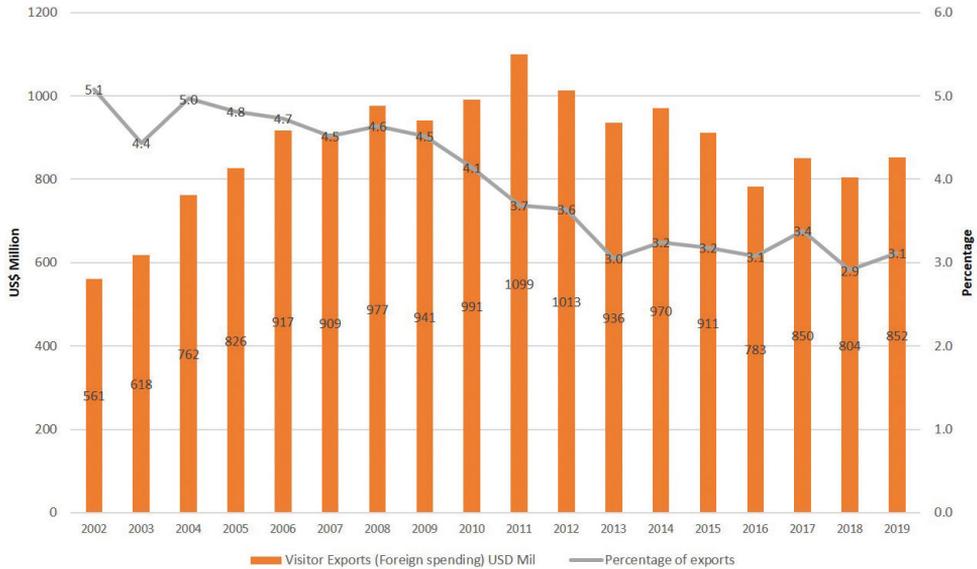
As shown in Figure 7, the number of foreign tourist arrivals in Pakistan has remained below 1 million since 2010 (955,000 in 2019). However, recessions/dips can be seen between 2000-03, 2007-08, and 2012-13 which can be attributed to economic and political instability, terrorism spill over from Afghanistan and calamities like earthquake and floods.



Source: WTTC & WB

Figure 7. International tourist arrivals

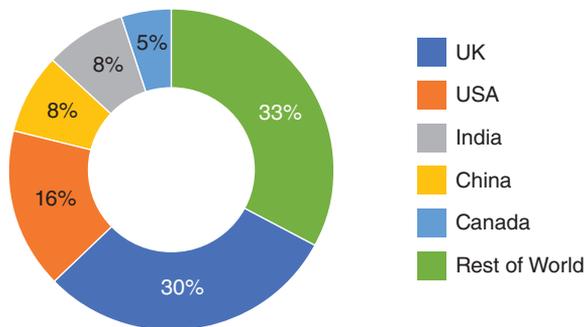
The analysis of data in Figure 8 reveals that spending by foreign tourists in Pakistan increased in value from US\$ 561 mil (2002) to US\$ 852 mil (2019) but waned as percent of total exports from 5.1% in 2002 to 3.1 % in 2019.



Source: WTTC

Figure 8. International tourist receipts

In 2019, over half of the arrivals were from UK/Europe and North America comprising mainly overseas Pakistanis who were visiting friends and relatives (VFR). These visitors generally don't engage in recreational tourism. Eight percent of visitors, mainly Sikhs pilgrims, came from India while an equal number of Chinese due to CPEC visited Pakistan mainly for business purposes.



Source : WTTC

Figure 9. Inbound arrivals (2019)

Past research by Rana (2015) found that in 2012, only 14.7% tourists visited Pakistan for recreational purposes which is quite low and hints at a huge potential to increase the share of leisure tourism in Pakistan from abroad.

Tourism Potential of Pakistan

Pakistan is among the few countries that have a wide array of tourist attractions including highly diverse and beautiful flora and fauna, as well as cultural, archaeological and religious heritage sites. According to British Backpackers Association, “Pakistan, with its breathtaking mountain scenery, fabulous food, and probably the world’s greatest ‘road trip’, has taken the top spot” for backpackers (Fuxe, 2018). According to influential US magazine, Forbes, Pakistan is among the “top 10 Best Under-the-Radar trips in 2020” (Abel, 2020). The prestigious travel magazine, Conde’s Nest, placed Pakistan at the top of the list for Adventure Destination in 2020 and also for 2021 (Pook, 2020). The potential of Pakistan’s tourism industry can be defined under the rubric of three broad categories given below.

- *Adventure and Ecological Tourism*

Pakistan has a highly attractive and varied natural landscape which can cater to the needs of adventure and ecological tourists. Straddling across its northern region (Gilgit Baltistan (GB), Kashmir and party KP), Pakistan has three of the world’s majestic mountain ranges — Karakorum, Hindukush and Western Himalayas — and five of world’s tallest mountains exceeding 8000 meters — K2, Nanga Parbat, Gasherbrum I & II and Broad Peak. Two of world’s largest glaciers outside Polar Range — Baltoro and Biafo Hisper glaciers — are located in Pakistan (Britannica, 2020b). The northern regions of GB, KP and Kashmir are also dotted with innumerable attractions including enigmatic mountain passes, serene valleys, fairy meadows, placid lakes, gushing waterfalls, torrential rivers, and exotic flora and fauna. Pakistan is also blessed with vast enigmatic deserts — Thall in Central, Thar and Cholistan in South East and Kharan in South west — which adds to country’s potential for adventure tourism and eco-tourism (Discover Pakistan, 2020). Pakistan is also blessed with fertile plains, mighty rivers, and pristine beaches along its 990 km long coastline in Sindh and Baluchistan provinces (MFF Pakistan, 2016).

- *Religious, Archaeological and Heritage Tourism*

Pakistan is the cradle of splendid ancient civilizations such as Gandhara, Mohenjo-Daro, Mehr Garh and Indus Valley civilizations which have bequeathed indelible and abundant archaeological and heritage patrimony with immense appeal for heritage tourists. Being a melting pot of various religions, cultures and races due to its location at the junction of Central, South and West Asia, Pakistan has historic cultural and religious sites belonging to Buddhism, Hinduism, Islam and Sikhism. Taxila in Northern Punjab and Takht Bhai in KP, inter alia, were

important centres of the Gandara Buddhist civilizations and thus hold immense appeal for Buddhists across world. Makli Nacropolis in Sindh is another major tourist destination. Punjab, the birthplace of Sikh religion's founder Guru Nanak and seat of the only Sikh empire, has immense significance and appeal for the Sikh community in India and overseas. Pakistan also has several sacred religious sites for the Hindu religion which can attract pilgrims from India. Lastly, Pakistan has lot of Sufi shrines enjoying immense reverence among Muslims across world.

- *Culture, Leisure and Shopping Tourism*

Pakistan's metropolises such as Karachi, Lahore, Peshawar, and Multan have rich cultural, architecture, and heritage appeal besides offering opportunities to unwind and partake culinary delights and indulge in shopping sprees.

Economic Potential of Tourism in Pakistan

As explained in Figure 1, the T&T industry has wide-ranging direct, indirect and induced economic benefits called multiplier effect. For instance, 1 US\$ spent on T&T results in more than 1 US\$ economic output. Using data from WTTC (2019), the multiplier effect of tourism in Pakistan is calculated using the equation below and given in Table 1.

$$\text{Multiplier Effect} = \frac{(\text{T\&T Total Contribution to GDP})}{(\text{T\&T Direct Contribution to GDP})}$$

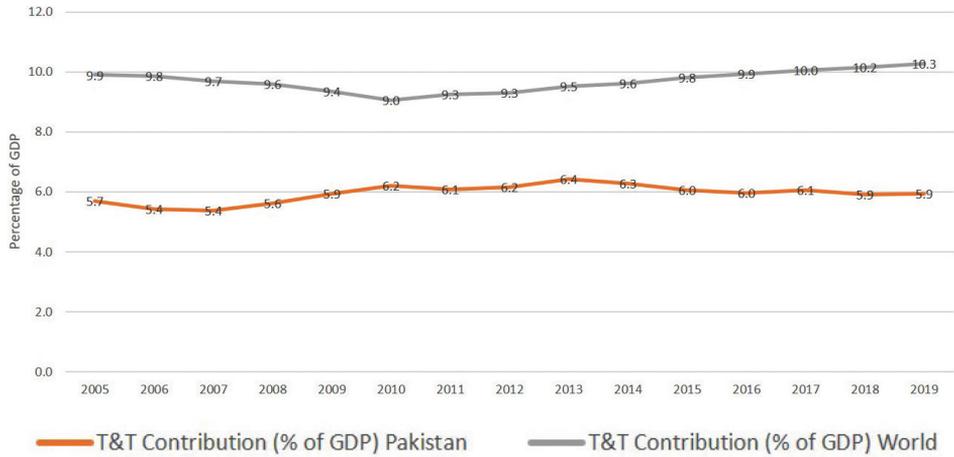
T&T has a high multiplier effect (3.3) in Pakistan implying that each US\$ spent on tourism directly generates additional US\$ 2.2 in indirect and induced sectors.

Table 1. Tourism and travel industry's multiplier effect in Pakistan

	2012	2013	2014	2015	2016	2017	2018	2019
T&T's total contribution to GDP (US\$ billion)	13.8	14.9	15.3	16.4	16.6	18.5	18.6	16.8
T&T's direct contribution to GDP (US\$ billion)	4.2	4.5	4.6	4.8	4.8	5.4	5.6	5.1
Multiplier effect	3.3	3.3	3.4	3.4	3.4	3.4	3.3	3.3

Source: WTTC

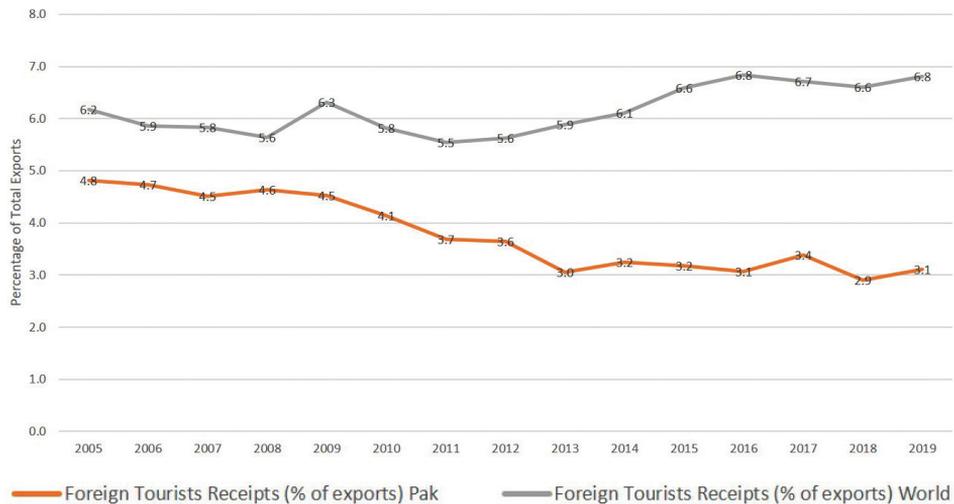
As can be seen in Figure 10, in Pakistan, the T&T sector contributed 6% to GDP (2019) while the global average contribution of T&T to GDP was 10%. Assuming that tourism's share rises to 10% of Pakistan's GDP matching global average, the industry is expected to earn a revenue of US\$ 27.8 billion (10% of GDP i.e. US\$ 278) against the actual revenue of US\$ 16.8 billion in 2019.



Source: WTTC

Figure 10. T & T contribution (% of GDP) – Pakistan vs World

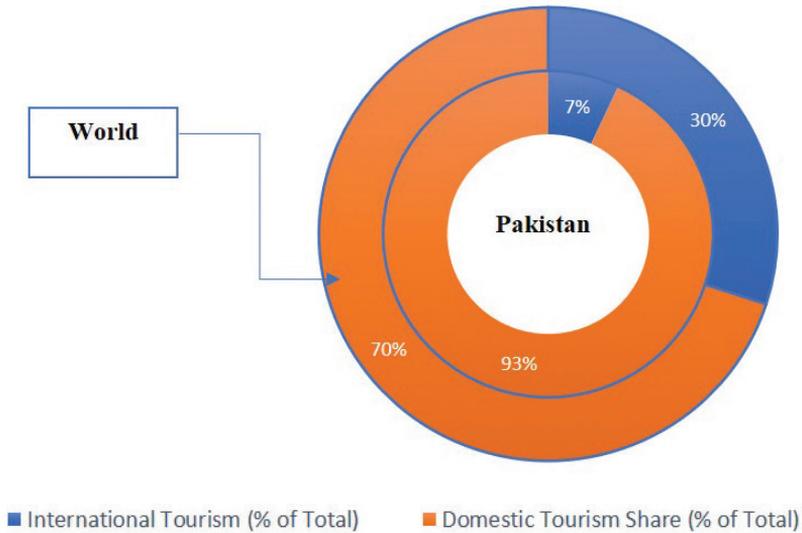
As shown in Figure 11, Pakistan’s foreign tourism earning was 3% (US\$ 852 mil, 2019) of total export earnings while the global average was 6.8%. Pakistan should be able to raise its foreign tourism earning to the global average of 6.8% from 3% and thus has the potential to earn US\$ 1868 mil (6.8% of total exports) in foreign tourism earning against actual earning of US\$ 852 mil in 2019.



Source : WTTC

Figure 11. Foreign tourism (% of exports) – Pakistan vs World

Another way to calculate potential of foreign tourism earning in Pakistan is to compare its share in total tourism spending (7%) with the world average (30%) given in Figure 12. If we are able to increase the share of foreign tourism to 30% of total tourism in line with the global average, the potential of foreign tourism earnings comes up to US\$ 5.04 billion (30% of US\$ 16.8 billion i.e. 2019's total tourism spending).



Source: WTTC

Figure 12. Foreign vs domestic spending (2019)- Comparison

In a nutshell, Pakistan's tourism industry has huge untapped potential and the industry can earn US\$ 27.8 billion if we raise our performance to world average. Similarly, foreign tourism spending in Pakistan is quite low compared to the world average. Pakistan has the potential to earn US\$ 5.04 billion in international tourism if we are able to match world average.

As can be seen in Table 2 and 15, Pakistan performs at below its potential level in attracting foreign tourists compared to countries of South Asia and much below compared to major tourism players like Turkey, Malaysia and Turkey.

Table 2. Comparison of international tourist arrivals

Destinations	2014		2019	
	Value (US\$ billion)	Arrivals (Million)	Value (US\$ billion)	Arrivals (Million)
Pakistan	1.0	1	0.9	0.95

Table 2 (con't)

Destinations	2014		2019	
	Value (US\$ billion)	Arrivals (Million)	Value (US\$ billion)	Arrivals (Million)
Maldives	2.8	1.2	3.2	1.7
Sri Lanka	3.3	1.5	4.8	1.9
India	20.3	13.1	30.3	17.9
Malaysia	24.2	27.4	22.5	26.1
Turkey	38.5	39.8	41.4	51.2

Source: WTTC, UNWTO

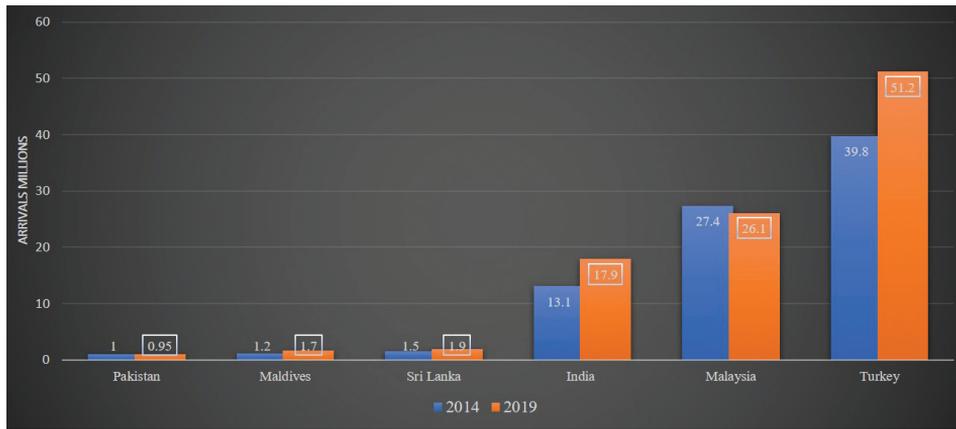


Figure 13 International tourist arrivals

Section II: Analysis of Factors that have Constrained the Development of the Tourism Industry of Pakistan

Despite having immense tourism potential, Pakistan has seriously lagged amongst other countries in harnessing its tourism industry. In 1970s, Pakistan was a favourite tourist destination becoming part of the vaunted Hippie Trail. Pakistan’s location as a gateway to Afghanistan, Iran, India and Gulf was an added charm. However, due to the protracted turmoil in Afghanistan and on-and-off conflict with India, Pakistan’s tourism industry lost its momentum. A study of Pakistan’s ranking on World Economic Forum’s (WEF) global Travel and Tourism Competitiveness Index (TTCI) is a useful way to gauge the tourism industry’s state of play in Pakistan (World Economic Forum [WEF], 2019). TTCI enables policy makers to discern global trends in the industry and identify areas needing intervention. TTCI ranks the tourism industry of 140 countries based on following 4 broad parameters and scores of sub indicators as given in Table 3.

Table 3. Travel & Tourism Competitiveness Index Framework

Enabling Environment	T&T Policy and Enabling Condition	Infrastructure	Natural & Cultural Resources
Business environment	Prioritization of travel & tourism	Air transport infrastructure	Natural resources
Safety & security	International openness	Ground & port infrastructure	Cultural resources & business travel
Health & hygiene	Price competitiveness	Tourist service & infrastructure	
Human resources & labour market	Environmental sustainability		
ICT readiness			

Source: WEF

TTCI 2019 ranked Pakistan at 122nd position while in 2017, Pakistan was ranked 124th. According to TTCI, Pakistan scores particularly low on Infrastructure (air, ground and tourism services), Safety and Security, Prioritization of T&T, International Openness (visa), ICT Readiness, Human Resources, and Environmental Sustainability. However, Pakistan fares rather well on Price Competitiveness, Business Environment and Cultural Resources.

Performance Overview

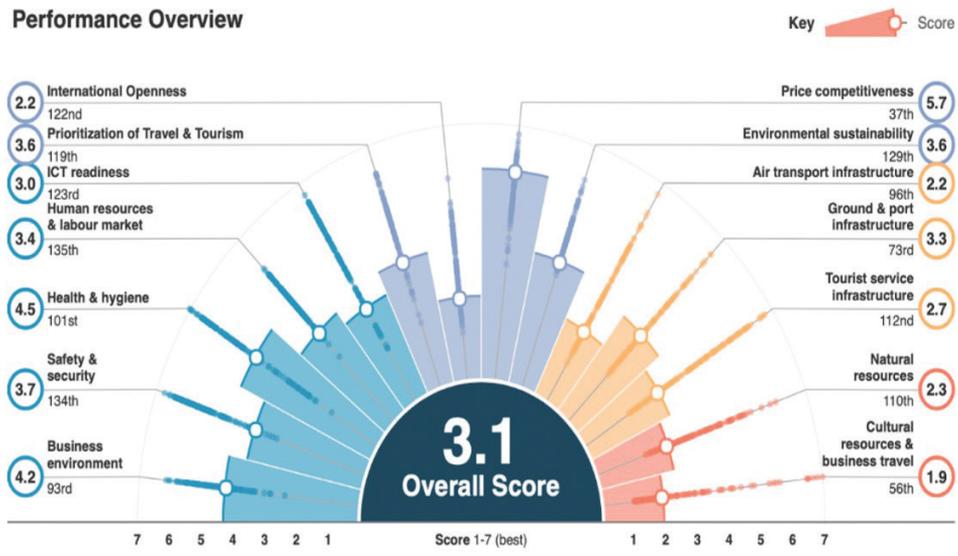


Figure 14 Pakistan's T&T Competitiveness Index 2019

In addition to WEF's T&T Competitiveness Index, a review of research literature indicates that the following major factors have held back Pakistan's tourism industry from achieving its true potential.

Previous Tourism Policies and Institutional Arrangements

Literature reveals that tourism was first accorded seriousness in 1972 when a Ministry of Religious Affairs, Minorities and Tourism was set up. Earlier in 1970, PTDC was set up as a public corporation to foster tourism infrastructure and promote Pakistan as a tourism market. The first meaningful tourism policy was drafted in 1990, but it was not seriously implemented. An improved Tourism Master Plan was formulated in 2000 but met same fate. In 2010, the Tourism Ministry drafted a more comprehensive and useful tourism policy but it could not be implemented due to devolution of tourism to provinces in 2010 under the 18th Amendment. The federal tourism ministry was dissolved creating a void at the federal level. Although each province set up a Tourism Development Corporation, the tourism industry exhibited a lacklustre performance due insufficient resources, lack of professionalism and poor inter-departmental coordination at the provincial level. Later on, Khyber Pakhtunkhwa (KP), under the PTI government, took the lead in placing importance on the tourism sector and in 2015, unveiled a well-designed tourism policy focusing on infrastructure development and private sector participation with the aim of transforming KP into a hub of local and foreign tourism (Rana, 2015).

New Initiatives under the Incumbent Federal Government

In line with the Prime Minister's vision, the current Government has taken many steps to transform Pakistan's tourism industry. Keeping in view the limits of the scope of this research paper, only a gist of measures is given below.

- *Restructuring of PTDC*

In 2019, the federal cabinet approved the restructuring of PTDC with a wider mandate, reconstitution of its Board of Directors and rationalisation of its human resources as per the advice of a special task force on tourism.

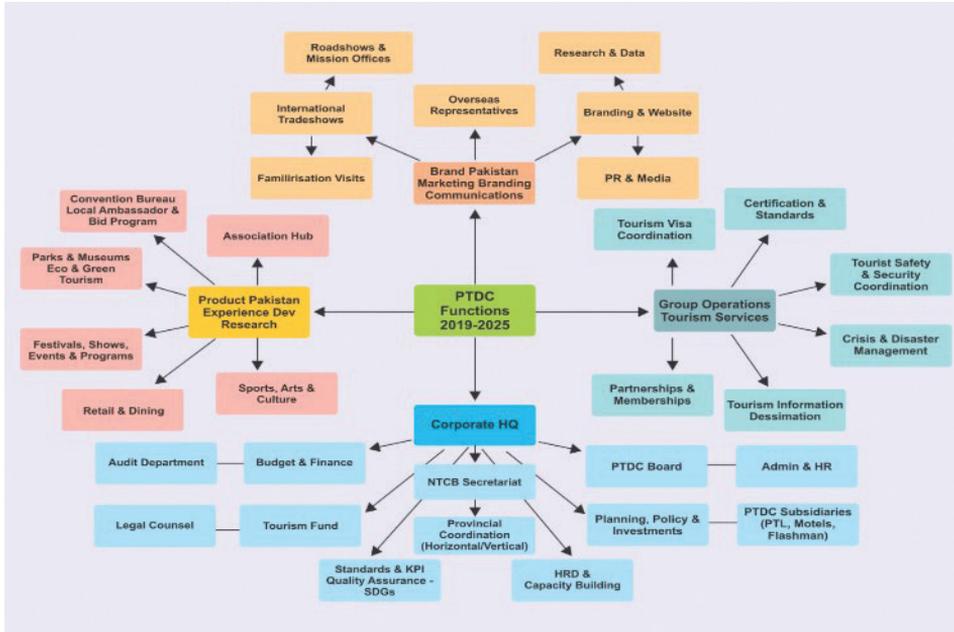


Figure 15. PTDC functions

- *Constitution of NTCB*

Furthermore, a National Tourism Coordination Board (NTCB) was set up with members from federal and provincial tourism departments, travel and trade associations and experts. NTCB has been given a wide mandate to: i) coordinate with provincial, national and international organisations; ii) carry out marketing and promotion of tourism and participation at international expos; iii) coordinate with relevant stakeholders on investment and human resource development; iv) assist provinces in chalking out regulatory framework for quality standards; v) promote intra-provincial cooperation and synergies; vi) oversee reforms related to visa and No Objection Certificates (NOCs) etc (Pakistan Tourism Development Corporation [PTDC], 2020).

- *National Tourism Strategy (NTS) (2020–30) and Action Plan*

Under the guidance of NTCB, a National Tourism Strategy (2020–30) along with a 5-year Action Plan was formulated. The NTS aims to transform Pakistan into a preferred tourism destination by promoting culturally conducive, economically viable and environmentally sustainable tourism. NTS will focus on four clusters — Good governance; Tourism growth; HR development and job creation; and Enablers of Growth for policy interventions. Under each cluster, actions and sub-actions have been identified which cover the entire breadth of the tourism sector

(PDTC Newsletter, 2020). In line with NTS, provincial governments have also aligned their tourism policies to achieve the goals identified under NTS.

- *Promotion of religious tourism— Kartarpur Corridor & Buddha Trail*
In a remarkable initiative, the government reconstructed and opened the second holiest Sikh shrine at Kartarpur, 5 km from Indian Punjab, allowing visa-free entry to Sikh pilgrims from India. The initiative was fervently lauded by Sikh community. Similarly, the Buddha trail comprising Buddhist heritage sites in KP, Punjab, AJK and GB is also on anvil which will help attract tourists from Asia Pacific.
- *Easy visa policy*
To promote tourism, the visa issuance policy was simplified and e-visa was introduced in 2019 for nationals of 170 countries. Visa on arrival has also been introduced for 50 countries while the business visa process has also been simplified.
- *Brand Pakistan*
According to the PTDC newsletter, the process of developing Brand Pakistan as part of systematic marketing campaign has been completed but launch has been pending due to pandemic outbreak.
- *Tourism e-portal and social media campaign*
PTDC has also transformed its website to provide more information on the tourism sector and to make it more responsive to the needs of tourists. A plan to launch an e-portal to connect them with tourist sites virtually is also afoot. PTDC is engaging with over 185,981 travel enthusiasts at Facebook and 2500 followers at Instagram to promote all aspects of tourism.
- *Pakistan Tourism Development Endowment Fund (PTDEF)*
An endowment fund with a seed money of Rs 1 billion was set up under the directives of Pakistan's Prime Minister. The PTDEF will be used for various purposes to support the tourism industry.

Factors Constraining Potential of Tourism in Pakistan

The following factors are the main reasons for the tourism development of Pakistan.

- *Low priority to tourism sector*
Pakistan's tourism sector has been a victim of neglect, indifference and dearth of resources by successive governments at the federal and provincial levels in Pakistan despite the sector's immense potential to propel the economy, improve livelihoods and earn foreign exchange. The 2019 Global Tourism Competitiveness Index that assigned Pakistan its 122nd position in "Prioritization of Travel and Tourism" validates the point.
- *Lack of a tourism promotion entity at the federal level*
After the 18th Constitutional Amendment, tourism was devolved to provinces and the federal Ministry of Tourism was abolished. This left a void as there is no federal entity that can promote Pakistan as a tourism destination, coordinate with

provinces on issues like visa, security, quality standards, represent country at global level etc. This issue has now been addressed with the establishment of NTCB.

- *Deficient tourism infrastructure*

Due to the ravages of terrorism and natural disasters — 2005 earthquake and 2010 flash floods— the basic infrastructure of many tourist regions in AJK and KP withered. Further, due to insufficient investment, Pakistan has weak tourism infrastructure. Pakistan lacks tourism resorts, recreational and sports activities, access roads and roadside services, signboards, transport services, health, sanitation and solid waste disposal facilities for tourism destinations. The airport infrastructure, which plays an important role in the seamless and pleasant experience for foreign tourists, is also a weak point. Further, Pakistan's airports have cumbersome procedures for immigration, customs, narcotics and security checks which discourage foreign tourists including the diaspora. Pakistan ranks 129 on Global Tourism Competitiveness Index (GTCI) 2019 for Airport Infrastructure and 96 on Ground and Port Transport Infrastructure.

- *Lack of coordination among stakeholders*

The dissolution of the federal tourism ministry in the wake of the 18th Amendment ended institutional mechanism for federal provincial coordination which had adverse impact on tourism management and development. At the horizontal level, there is little inter-departmental coordination within provinces. For instance, in Punjab, several departments such as Auqaf, environment, wildlife, forestry, highways, police etc have role in tourism management but lack a clear coordination mechanism. There is no mechanism for inter-provincial coordination due to which they cannot consult on cross-cutting policy issue. In Pakistan, there is no institutional mechanism such as a joint Tourism Council to engage and involve the private sector in tourism planning, promotion and management activities.

- *Low ICT readiness*

Globally, the T&T industry has shifted to digital platforms through which tourists access tourism services ranging from tourism promotion to hotel booking, car rentals, pre-tour planning to queries about tourism sites. Digital platforms like Hotel.com, Agoda, AirBnB, Trivago and Tripadvisor along with social media play a significant role in facilitating tourism these days. In contrast to the world, Pakistan's tourism industry is conspicuously absent on the digital and social media platforms which seriously hampers the country's ability to attract foreign tourists. WEF's TTCI has ranked Pakistan low in ICT readiness at 122nd among 140 countries.

- *Weak institutional mechanism and capacity*

Both federal and provincial tourism departments directly or indirectly dealing with tourism lack proper training, capacity and skills to draft and implement policies for tourism promotion and management. Punjab, Sindh, and KP have

numerous archaeological and heritages sites and monuments. However, these provinces do not have a strong expertise in the restoration of the historical monuments and preservation of the cultural and archaeological heritage sites. A limited extent of restoration is being carried out but that does not conform to world standards and results in lowering the touristic appeal of the site.

- *Dearth of reliable data on tourism*
Pakistan's authorities have not taken efforts to properly document and monitor the flow of tourists from abroad and within the country. The lack of data on tourist flow, its economic value etc is hindering effective tourism planning and discouraging investment in the sector.
- *Security/Geo-political vulnerabilities and negative image*
Until 2-3 years ago, Pakistan was ravaged by the scourge of terrorism which had a debilitating impact on the tourism industry and created indelible negative impression among foreign tourists. Furthermore, the periodic flare-up of India-Pakistan tensions also discourages foreign tourism. Mercifully, due to the valiant efforts of the nation and its forces, the demon of terrorism has been defeated and security has returned to normalcy. However, situation at eastern borders is still tense and despite the return of relative peace in Pakistan, the country's image has not improved among foreigners which is hindering tourism.
- *Ineffective enforcement of quality standards and environment regulations*
The relevant laws that regulate quality standards for hotels, tour operators, resorts, recreational facilities, restaurants, and travel agents are outdated and poorly enforced. International tourists are quite sensitive about safety issues. Unfortunately, Pakistan does not have sufficient and reliable safeguards against fire hazard, and emergency health facilities for tourist destinations which discourages foreign tourism. Further, due to the lax application of environmental laws, over-construction and extensive littering at tourist sites have resulted in environmental degradation which lessens potential for tourism.
- *Lack of systematic and sustained marketing and promotion*
Pakistan has not undertaken a systematic and sustained marketing campaign to promote its tourism industry abroad. In Pakistan, neither the private nor government sector entities dealing with tourism have made substantive efforts to participate at global tourism fairs and festivals.
- *Poor human resource development*
Pakistan lacks well-qualified, skilled workforce in hospitality and tourism at primary and tertiary levels which adversely affects quality of tourism services. TTCI ranked Pakistan 73rd in tourism services in 2019. The country also lacks world-standard universities or dedicated hospitality training institute, with global accreditations, due to which the workforce in tourism industry is not able to upgrade its skills. Only top-level executives have access to foreign institutes.

- *Lack of investment by the private sector*
Due to low demand, lack of incentives, costly land, unpredictable tax policies and cumbersome regulatory regime, the private sector has shied away from investing in the tourism sector. The sector demands huge investment which cannot be funded by the public sector alone and hence private sector involvement is essential.
- *Difficulty in obtaining visa*
Although the visa system has been liberalised and simplified including an option for online visa issuance, it remains cumbersome for some countries including India from where Pakistan receives thousands of religious tourists.

Section III: Impacts of COVID-19 and Solutions to Revive Tourism in Pakistan

On 31 Dec 2019, Chinese authorities alerted the World Health Organization (WHO) of the outbreak of a highly transmissible new viral infection identified as 2019-nCoV and later called COVID-19 at Wuhan City, Hubei province. By March 2020, WHO declared the virus as a global pandemic which compelled governments all over the world to take extensive and strict measures such as suspension or restrictions on international air travel, closure of national borders, lockdowns, mandatory testing and health screening to curb the virus spread (AJMC, 2020). According to WHO, as of 19 Dec 2020, the virus has infected more than 74 million people causing over 1.66 million deaths worldwide (WHO, 2020). Advanced countries like the United States and European countries were the worst hit due to a larger old age population.

Impact of COVID-19 on Global Economy and T&T Sector

COVID-19 brought life and economic activities to a standstill in almost all countries. The economic impact of COVID-19 has been touted to be more severe than the 1930s Great Depression and 2008's Global Financial Crisis. According to International Monetary Fund, (IMF), the pandemic would shave off 4.4% of the global GDP in 2020 while 90 million people risk falling below extreme deprivation level (2020). The pandemic also could cause global labour income to fall by 10.7% or US\$ 3.5 trillion by the first three quarters of 2020 (International Labour Organization (ILO), 2020). The T&T sector was the worst hit in 2020 due to the partial or complete suspension of international travel. International tourist arrivals fell by 70% (700 million less than 2019) in the first eight months of 2020, losing about US\$ 730 billion in export revenues from foreign tourists (UNWTO, 2020b). According to WTTC, the T&T sector could face a loss of up to US\$ 3.4 trillion and 121 million jobs due to the pandemic. The aviation industry suffered a revenue loss of US\$ 389 billion in 2020 (International Civil Aviation Organisation, 2020). The impact of COVID-19 on Pakistan's economy and

tourism sector has been mercifully low as the spread of virus and its virulence has been modest in Pakistan. As of 19 Dec 2020, 457, 288 Pakistanis got infected while 9,330 succumbed to death (Government of Pakistan, 2020a). Nevertheless, Pakistan's fragile economy was severely impacted by pandemic and its GDP nosedived to -0.38% while over 1.4 million lost their jobs in 2020 (Government of Pakistan, 2020b). Expatriate Pakistanis also lost jobs in Gulf Cooperation Council (GCC). The T&T industry in Pakistan also suffered due to the pandemic particularly the international tourism segment due to reasons applicable elsewhere. The arrivals of overseas Pakistanis from the West turned to a trickle while pilgrim visits from India and elsewhere also came to a halt. In line with global trends, domestic tourism in Pakistan, however, has been less vulnerable to the pandemic due to low number of infections, lack of travel restrictions and encouragement by the government.

Challenges Posed by COVID-19 for T&T Sector

COVID-19 has posed numerous challenges to the T&T industry, which is true for Pakistan as well as rest of world, as follows:

- In the face of severe economic losses, companies especially SMEs may find it hard to stay afloat;
- In the wake of significant lay-offs, businesses will find it challenging to re-hire workers once demand picks up;
- Providing minimum support to laid off workers, many of whom facing social and mental health issues;
- Airlines such as Pakistan International Airlines (PIA) are facing severe financial stress as volume of traffic has waned significantly;
- Restoring the trust of international tourists in far-off destinations in post-COVID situation;
- Implementing enhanced health and hygiene protocols across entire value chains of the T&T sector while absorbing the costs of these measures amid falling revenue;
- The entire T&T industry has to adapt, reskill and re-equip itself to meet new trends in tourist demand such as a shift towards digitalization, greater focus and sensitivity towards tourism's footprint on environment, nature and wildlife;
- Demand curve for tourism may shift downwards (contract) even when the pandemic subsides because the overall economic crisis has diminished people's disposable income

Emerging Trends in Travel and Tourism Industry

However, the following emerging trends are important in their own perspectives.

- *Demand evolution*
International tourism has fallen out of favour with tourists due to concerns about infections, travel restrictions and fear of being stranded abroad. Experts

predict foreign tourism to bounce back strongly once vaccine is widely available. Meanwhile, countries heavily reliant on foreign tourists have enhanced their marketing and infrastructure development in anticipation of resumption of foreign tourism. In the current situation, tourists are likely to avoid country hopping, and would rather select one foreign destination with a longer stay of 3-4 weeks (Mirani, 2020). Both governments and the T&T industry are now promoting domestic tourism to revive the sector by giving incentives, improving health and hygiene standards and adopting a good communication strategy to restore the trust of tourists. Various surveys conducted in the USA, Japan, Malaysia, China and Australia indicate that tourists preferred domestic destinations, particularly less crowded and less traditional tourist spots to minimise infection risk (PDTC Newsletter, 2020).

- *Focus on health and hygiene*

The pandemic has increased tourists' consciousness about health and hygiene issues. Thus, the T&T industry will have to adopt effective hygiene measures and ensure availability of healthcare facilities at tourism destinations.

- *Environmental, nature and wildlife sustainability*

It is generally believed that the COVID-19 virus emerged due to relentless human encroachment on wildlife and natural habitats. People are now more conscious of these issues and are eager to minimise the impact of human activity on nature. Therefore, sustainable tourism has become even more important and has to be given priority in the post-COVID scenario.

- *Digitalization of services*

COVID has accelerated the shift towards digitalization which was already underway in the T&T industry. Resultantly, tourists are planning most of their vacations digitally while the trend of virtual tours using augmented reality (AR) has also increased. The entire T&T industry will have to adapt to the digitisation trend (WTTC, 2020).

Pakistan's Tourism Sector's Response to the Pandemic

NTCB set up a task force named Tourism Recovery Action Committee (TRAC) to mitigate the impacts of COVID-19 on the tourism industry. TRAC suggested a three-pronged approach to deal with the socio-economic impacts of COVID-19 on the tourism sector:

- 1) Various types of financial support to industry/SMEs
- 2) Incentives for job retention; relief to daily wagers; and special training programmes for the affected workforce
- 3) Preparing the tourism sector to meet post-COVID trends by, inter alia, focusing on quality standards, digitalisation, upskilling of workforce; better research and data collection

TRAC also developed health and hygiene SOPs to safeguard tourists against the risks of contracting COVID-19 infection. The SOPs were rolled out across hotels, air and ground transport, tour operators and restaurant/recreation segments (WTTC, 2020). Despite the onset of the COVID-19 pandemic, both federal and provincial governments are valiantly continuing their efforts to lay the groundwork for structural improvements and upgradation in the tourism sector to position it in a way that it can reap benefits once the pandemic recedes. Bold measures such as institutional restructuring, National Tourism Strategy and Action Plan, infrastructure upgrades including establishment of new hotels, quality standards etc are being undertaken.

Conclusion and Recommendations

The T&T industry is the leading contributor to economic and employment growth globally. Pakistan has immense tourist potential including a kaleidoscope of natural landscapes, unrivalled archaeological, religious heritage and rich culture as well as leisure and shopping attractions. Pakistan's central location also adds to its appeal. Due mainly to a tough geopolitical environment, conflict and strife in Pakistan's neighbouring regions, a conducive environment had not been available for realizing Pakistan's rich tourism potential. However, as Pakistan has valiantly vanquished the scourge of extremist violence along with CPEC -led infrastructure upgradation, the tourism industry is set to take off in a big way. In 2019, tourism contributed a total of \$ 16.7 billion to Pakistan's GDP but there is a potential to raise this amount to \$ 27.8 billion. Fortunately, the incumbent federal government has taken the lead in providing an institutional framework and formulated National Tourism Strategy (NTS) to spearhead the revival of the sector. Unfortunately, the outbreak of the COVID-19 pandemic in 2020 has thrown a spanner in the works of Pakistan's tourism sector recovery. Nevertheless, the pandemic's impact will subside hopefully with the widespread availability of vaccine and adoption of health and safety safeguards in the interim. This paper has identified a number of recommendations based on global best practices which were not included in NTS. Pakistan seems all set to finally emerge as a wonderful tourism destination but the country needs consistent concerted and sustained efforts to achieve durable success.

Approaches/Policies to Revive Pakistan's Tourism Industry

To revive Pakistan's tourism industry, two types of policy solutions are suggested: the first refers to short-term and urgent measures aimed at overcoming challenges posed by the pandemic while the second are long-term ones aimed at addressing chronic weaknesses identified in Section II of this report.

Measures to Alleviate COVID Impacts

The following recommendations are crucial for tourism development in Pakistan.

- *Adopt effective health and hygiene protocols*
Although TRAC under NTCB has already required the T&T industry to adopt health and hygiene SOPs to minimise the risk of COVID spread, the implementation mechanism is not strong. Furthermore, healthcare facilities at tourism centres need to be improved to deal with emergencies.
- *Promote domestic and youth tourism*
Domestic tourism is the engine of growth for tourism under all scenarios but has assumed greater significance in the COVID-19 era. The government may offer incentives while the industry may offer better packages to promote domestic tourism. Groups with a higher risk appetite such as student and youth may be encouraged to undertake domestic tourism by providing them cheap accommodation and services. Domestic tourism can also be boosted by capturing the demand of affluent outbound Pakistani tourists who presently cannot go overseas.
- *Slow and smart tourism*
As tourists are keen to avoid crowded places, COVID-19 has provided an opportunity to Pakistan to reduce overtourism at few favourite spots, and instead introduce and develop new eco-tourism destinations. This will lessen the pressure on existing sites, minimise infection risk and percolate the benefits of tourism to remote communities and areas.
- *Financial assistance to domestic tourism industry*
The Pakistan government has announced financial aid for tourism to protect jobs and small companies. However, there is a need for a proactive policy to ensure that the support reaches all vulnerable and affected companies/employees.
- *Promote sustainable tourism*
In order to attract foreign tourists and to prevent the degradation of Pakistan's natural tourism assets, Pakistan needs to make natural, environment and wildlife conservation an important part of its tourism planning. This can be done by upgrading and strictly implementing the relevant regulations. New construction should be linked with environment and nature conservation, use of nature-friendly building materials may be promoted, mushroom construction may be discouraged, and waste disposal mechanism may be adopted.

Long-Term Measures to Revive the Tourism Industry

As explained in Section II, the government has approved a National Tourism Strategy (2020-30) which spells out comprehensive policy interventions for the

tourism industry. Therefore, this paper will only focus on few broad long-term policy measures that are critical to reviving Pakistan's tourism industry.

- *Identify priority tourism sectors and target markets*
As elaborated in Section I, Pakistan has a huge potential in adventure and ecological tourism, religious, archaeological, heritage and culture tourism as well as leisure and shopping tourism. Initially, Pakistan may focus on the promotion of these segments under an umbrella campaign and match them with the relevant target markets locally and abroad. For instance, in Malaysia, there is lot of demand for adventure tourism among youth and professionals while leisure and shopping tourism is popular among housewives. Religious tourism likewise can be promoted among Sikhs, Hindus and Buddhists across different regions. Thus, developing an umbrella campaign with tourism products for many market segments would benefit the ailing tourism industry of the country.
- *Sustained branding and marketing campaign*
Every major tourist country, develops and markets its unique brand as an exquisite destination. The brand is built around a country's core attractions and is encapsulated in a tagline. For instance, Malaysia's tourism promotional campaign with the tagline "Malaysia Truly Asia" has worked well and attracted 26.1 million tourist arrivals with a US\$ 20 billion tourism receipt in 2019. Their promotional campaign is built around their culture, tropical landscapes and diversity of people. Under NTS, in developing a brand and marketing campaign, there is a need to undertake a well-funded international marketing campaign focused on key target markets on a sustained basis using traditional as well as digital marketing platforms. Since Pakistan suffers from an image problem abroad due to negative publicity, an effective marketing campaign becomes all the more critical to erase negative perceptions about the country.
- *Enhancing destination image and attractiveness*
PTDC should also make it a priority to develop a customer-oriented approach for Pakistan's tourism industry. Focus should be placed on improving customer journey with domestic and international tourist arrivals, accommodation, brochures and digital connectivity, transport system, food and drink, souvenirs and memories besides providing authentic experiences with unique tourism products, nature, heritage and activities, destination towns and cities, business tourism, events and festivals. Understanding the customer's journey and developing authentic experiences are important for any travel and tourism destination. To do so, surveys must be developed and chain of continuous feedback should be gathered to understand the needs of leisure and business tourists which will eventually inform PTDC plans, strategy and actions.
- *Infrastructure development*
While CPEC has improved Pakistan's inter-city highways vastly, access roads

to new tourist destinations still need to be built. The airport infrastructure can be vastly improved by outsourcing their Operations and Maintenance on PPP mode as done by Turkey, Malaysia and recently, India. The private sector may be encouraged to introduce comfortable road transport services for tourism destinations and develop service areas at highways for commuters. Soft infrastructure like signboards, maps, emergency services, well-trained tour guides, info leaflets etc may be developed. Sports and recreations activities may be established under the private sector make tourism destinations more attractive. Lastly, the private sector may be encouraged to build affordable and quality accommodation units at tourist destinations catering to the needs of different tourist classes. Homestays may be strengthened by helping residents improve facilities and imparting them basic hospitality training.

- *Capacity building of public and private sectors*

Capacity building courses at foreign institutes may be arranged to beef up the primary institutional capacity of federal and provincial tourism departments to formulate and implement tourism policies. Specialised expertise in heritage sites conservation and restoration may be developed. Professionals from private sector may be inducted in provincial tourism departments specially for highly technical assignments. Capability to promote private sector investment may be developed.

- *Human resource development*

Attract bright, talented youngsters towards the T&T sector by highlighting the lucrative prospects of the sector and offering them high-quality education and training in the field. The existing workforce may be reskilled through short-term refresher courses. Government staff at airports may also be trained to be courteous to tourists. Existing hospitality training institutes may be upgraded through accreditation with global agencies, induction of foreign qualified faculty, syllabus modernisation as well as student and faculty exchanges with foreign institutes. PTDC along with Higher Education Commission (HEC) may encourage public and private sector universities to offer courses and programmes in hospitality and tourism management at diploma, degree and higher levels (MSc and PhD). As the tourism industry demands specialised skills and engagement with industry, work-based-learning (WBL) programmes (3-year study and 1-year industry placement) should also be developed with curricula (hotel/hospitality management, recreation/leisure management, travel/tourism management, culinary arts/culinary management, food service/restaurants management, etc.) in addition to the existing conventional programmes.

- *Promote private sector-led growth*

The National Tourism Strategy (2020-30) needs to place the private sector in “the driving seat” for the transformation of Pakistan’s tourism industry. As elsewhere, the public sector tourism authorities in Pakistan may limit their role to policy

formulation, regulation and overall coordination. Further, the government may outsource to private sector roles such as marketing and promotion, destination management, infrastructure development, skills development, and so on.

- *PPP framework and investment policy for tourism sector*

The NTS needs to craft a lucrative investment policy with sufficient inducements to arouse the private sector's appetite in the T&T sector. A customised PPP framework with a flexible approach may be introduced to satisfy the distinct needs of the tourism sector. PPP projects can take many forms such as upgradation and management of hotels, outsourcing of operations and maintenance (airports, heritage sites, museums), construction on government land on long lease, management of events/festivals, or rendition of tourism services such as safari flights, private run trains for tourists, paid public toilets etc. In parallel to PPP projects, pure private sector projects may be facilitated by giving adequate rewards and removing impediments. First, use of public land on affordable long-term basis may be allowed. Tax policy may be made consistent, simplified and favourable. One window facility for license and regulatory approvals may be introduced. Additionally, effective, affordable and prompt alternate dispute resolution may be provided to ensure enforcement of contracts.

- *Digitalisation of T&T Sector*

Pakistan's tourism sector is conspicuously absent from global tourism portals, social media and web portals. These days tourists rely a lot on digital information about a country's tourist attractions, infrastructure, facilities etc for planning their holidays. All segments of the T&T industry in Pakistan, particularly federal and provincial tourism departments, tour operators, service providers, hotels, destination managers, etc need to effectively embrace digital technology using social media and global tourism platforms to share information on their services and market Pakistan's tourism potential.

- *Evaluation of sustainable travel and tourism components*

Research and analyses on important factors related to travel and tourism development should be given sufficient budget and attention. PTDC must not only study on environment impact assessment, economic impact assessment but also social/cultural impact assessment and evaluate strengths, challenges, opportunities, and risks assessment, policy and planning, systems and regulatory authorities to develop a responsible travel and tourism barometer.

- *National Tourism database*

Establishing a chapter on tourism statistics to record tourist arrivals, separating leisure and business tourists, identifying recreational, adventure, eco-friendly, visiting family and relative (VFR) visitors etc. at all entry points of the country would be important for a database/ICT readiness. Understanding accommodation occupancy rates and identifying employment needs across different states and cities will add value to

reduce unemployment and create focused job opportunities. Moreover, investment and infrastructure planning needs accurate and extensive data on tourism.

Acknowledgements

I am thankful to the Honourable Faculty, especially my supervising DS Mr. Asif Ali Kakepota, of the National Institute of Management, Karachi for the valuable guidance and continued support for this Individual Research Paper during the 28th Senior Management Course. I also owe much thanks to resource persons such as Professor Dr. Kashif Hussain, Head of School of Media and Communication, Faculty of Social Sciences and Leisure Management who had given invaluable advice during each stage of this research endeavour.

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