TECHNICAL PAPER 6

TOURISM DEVELOPMENT

6. TOURISM DEVELOPMENT

6.1 INTRODUCTION

Pakistan is located at the culmination of three of the highest mountain ranges in the world, one of the most vast river deltas in the world and a variety of unique landscapes. These natural endowments have blessed it with immense beauty and hence tourism-potential. It is also a land steeped in history, from the Indus Valley Civilization to the Mughal era, and has been at the crossroads for different cultures, ethnicities and languages. There is a rich cultural heritage of the province of Punjab that encompasses art, music, architecture, rich food, and festivals; most importantly a festive sense of identity.

However, due to the recent security situation and turmoil, Pakistan has not fulfilled its eminent tourism potential, in essence it is missing out on a large economic opportunity. Furthermore, even before the arrival of the menace of terrorism Pakistan, sadly, failed to market itself as a destination for international Tourism. Many of the nations in our global neighborhood have made tremendous leaps in developing this sector and utilizing it as a source for economic growth. The product offering of these countries is not much different from what Pakistan has to offer; in fact it can be argued that the variety of landscapes, ecosystems, cultures and traditions supersedes many. In tandem with the Tourism Policy 2009, a niche for Pakistan in the global tourism market needs to be created that will project it as a four-season tourist destination with a rich cultural and historical heritage.

Tourism is the fastest growing sector of the world Economy. According to the WTTC[1] the direct contributions of the sector towards global GDP have been 10.2% or USD 7.6 Trillion USD and outperforming the global economy for the 7th consecutive year.

In addition, Travel and Tourism created 109 million jobs worldwide. In terms of indirect impacts, tourism contributed USD 7.6 trillion to the world economy and supported 292 million jobs in 2016, which accounted for 1 in 10 of all jobs. Due to backward-forward linkages, tourism generates economic prosperity and drives exports making it one of the largest sectors in the world economy. Pakistan is entering a new era in the global arena and should take its rightful place as a major tourist destination. The country stands at a crossroads of tourism with the massive growth in Asia Pacific tourism and the prospect of China Pakistan Economic Corridor on the horizon. Punjab, as Pakistan's largest province, already sees the largest share of tourism and can develop into a major international hub.

Fastest Growing Sector of the World Economy .

10 % of Global GDP

1 in 10 Jobs Globally

6.1.1 Rationale for Focus on Tourism

Numerous research initiatives and The World Travel and Tourism Council state that the Tourism sector has a ripple effect on the Economy. According to numerous research studies there is a positive relationship between tourism investment and long-term economic development. 2 Such evidence has been found in the cases of Spain, Malaysia, Indonesia and Vietnam.

The rationale provided is that there are spillover effects from the services, attractions and commodities consumption by the tourists that lead to economic activity in different sectors of the economy, as explained in the figure below:

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[1] World Travel and Tourism Council

[2] Habibi, Fateh. (2015). Tourism Development and its Effects on Economic Growth in Selected Countries. American Journal of Economics, Finance and Management. .

**Figure 6.1 Economic Impact of Tourism Sector**
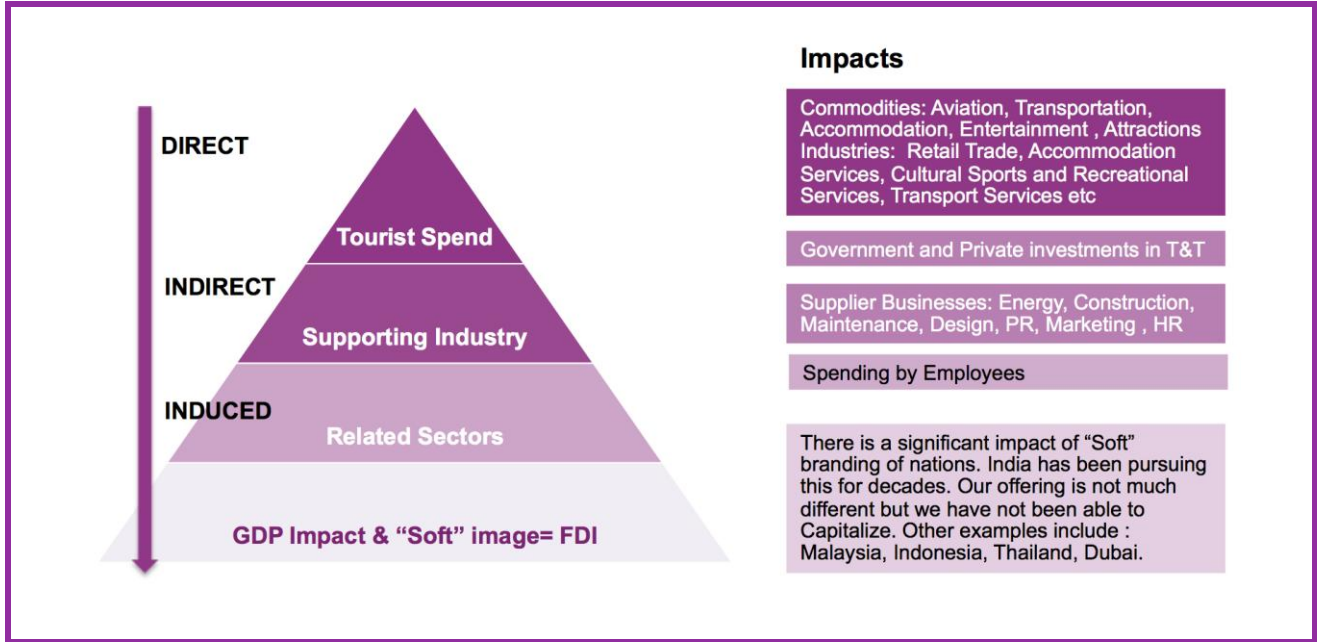
6.1.2 Rise of Tourism in Asia

The strongest growth was experienced in Southeast Asia (8.3%), which has benefited with rapid growth in the China outbound market, and South Asia (7.9%), with Sri Lanka (10.7%), Thailand (10.7%), Vietnam (10.7%), Philippines (8.9%), Singapore (8.7%), India (8.5%), and Indonesia (5.8%) contributing impressively. Most economic signs point to a large increase in tourism for South Asia and South East Asia.

The important point to note here is that our offering as a tourism destination is not much different from the rest of South Asia but we have not been able to capitalize as well as other nations in our global neighborhood. Pakistan has also seen an increase in tourism for the last two years; however, stability and infrastructure are needed to fully revamp Pakistan's tourism industry. Pakistan has consistently underperformed in a sector which has a 10.6% share in the world's economy. According to the World Travel and Tourism Council (WTTC), the 10 fastest growing destinations for leisure-travel spending will be India, followed by Angola, Uganda, Brunei, Thailand, China, Myanmar, Oman, Mozambique and Vietnam between 2016 and 2026. The security situation can be partially blamed for the situation in Pakistan tourism industry but it is also prudent to note that our marketing and branding initiatives to attract tourists have been scarce and outdated at best. Pakistan currently ranks 124 out of 136 countries on the World Travel and Tourism Competitiveness Index. Pakistan's Safety and Security score is 3.1, which is much lower than the South Asia average of 4.4 on the Safety Indicator. The collection and assessment of tourist data is not available via the Ministry of Tourism or any national level publication. There is an absence of data collection, assessment and monitoring for incoming international tourists. According to the available data there was a negative trend of incoming tourists in the year 2001-2002, this decline can be directly attributed to the security situation of the country.

Figure 6.2 Tourist Arrivals in Pakistan (1995 to 2012)
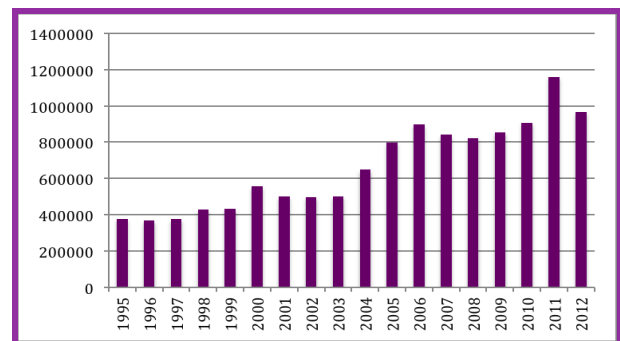
Source: The World Bank

Pakistan has an unsurprisingly high ranking on the Cultural Resources and Business Travel indicator, ranking 59th compared to its overall ranking of 124th. This is a clear indication of the gap between what our tourism potential could be and where we currently stand. The direct contribution of Travel & Tourism to GDP was PKR793.0bn (USD7.6bn), 2.7% of total GDP in 2016 and is forecast to rise by 5.1% in 2017, and to rise by 5.6% pa, from 2017-2027, to PKR1,432.1bn (USD13.6bn), 2.7% of total GDP in 2027. In 2016, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by Visitor exports generated PKR93.8bn (USD893.8mn), 3.6% of total exports in 2016. Travel & Tourism investment in 2016 was PKR375.2bn, 9.3% of total investment (USD3.6bn). The tourism industry was responsible for 6.0% of total employment (3,550,500 jobs). This is expected to rise by 3.0% in 2017 to 3,657,000 jobs and rise by 2.7% pa to 4,783,000 jobs in 2027 (6.3% of total). In 2016, Pakistan generated PKR93.8bn in visitor exports. In 2017, this is expected to grow by 3.1%, and the country is expected to attract 1,179,000 international tourist arrivals. This is an unprecedented increase that Pakistan needs to supplement with proper infrastructure investment in the

tourism sector. This is especially true for investment in air travel and the hotel industry. Travel & Tourism is expected to have attracted capital investment of PKR375.2bn in 2016. This is expected to rise by 8.1% in 2017, and rise by 8.0% pa over the next ten years to PKR872.0bn in 2027.

6.1.3 Incorporating sustainability

The sector of Tourism can contribute majorly towards the economic growth, environmental preservation and cultural promotion of a region. Given these impacts it is prudent to incorporate sustainability ambitions of the SDG Program with the future Tourism Policy for the Province of Punjab.

As discussed in the previous section investments in Tourism can have a far-reaching impact for economies. There is a need to incorporate our SDG objectives with the overall economic objectives of the province, the sector of Tourism presents the perfect test case. According to UNDP 41 out of the 64 voluntary national reviews (VNR) of progress towards SDG attainment mention "Tourism". On the contrary only 13 out of the said 41 VNRs report the involvement of Tourism sector stakeholders in National SDG Planning. This is the missing link that we need to worry about here in the context of Punjab. Emerging issues in the sector are a reflection of larger problems; climate change, unsustainable resource consumption and pressures of global economic fluctuations.

Although it can be argued that we have been unable to preserve, catalogue and capitalize on our tourism assets, a blank slate can be an asset for crafting a more sustainable framework for future tourism policy. Punjab government must incentivize the adoption of SDGs in the private sector of tourism. Below is a categorization of Different SDGs according to the impact Tourism can have on each; a detailed rationale is presented next.

SDG 11: Sustainable Cities and Communities: Strengthening of efforts are needed to protect and safeguard the world cultural and natural heritage. This is especially pertinent to our country whose historical and heritage sites are in a dilapidated condition. Efforts to preserve these sites with international and domestic interventions is paramount.

SDG 12: Responsible Consumption and Production: The tourism sector can be a flag bearer in this respect, through the incorporation and enforcement of sustainable resource utilization. This issue is now more relevant than ever as our local tourism and recreation destinations are facing an onslaught of numbers that are far beyond the capacity of the existing facilities. Furthermore, the uncontrolled exposure of large numbers of tourists can deteriorate the natural settings that are the attraction in the first place. All policy initiatives in the tourism sector must include resource utilization plans, so that our resources have a longer lifetime and output. Focus on this SDG will lead to a long-run impact towards the SDG 14 & SDG 15.

SDG 13: Climate Action: Tourism sector has a dual relationship with climate change as it directly contributes to global warming; in turn climate change can negatively impact the environment of tourist destinations. The TDCP needs to spread awareness among the private sector stakeholders about the dual nature of this relationship and encourage sustainable practices. This can be achieved through regional workshops.

SDG 4: Quality Education AND SDG 8: Decent Work and Economic Growth: In most cases tourism industry relies heavily on the locally available human resources. Through private training and professional development the tourism sector impacts the level of professionalism amongst its work force. The tourism sector can partner with educational institutes; where the late can provide them with professional development and tourism companies can in turn organize knowledge sharing related to the tourist attractions, historical sites and natural assets of Punjab. Private entities in the tourism sector can also give donations and encourage educational development in their locality. A case study for such localized development is the Serena Hotels chain in Gilgit and Sakardu, which encourage the development of schools in those districts by donating in cash and in kind.

Figure 6.3: Tourism sector impacts on SDG
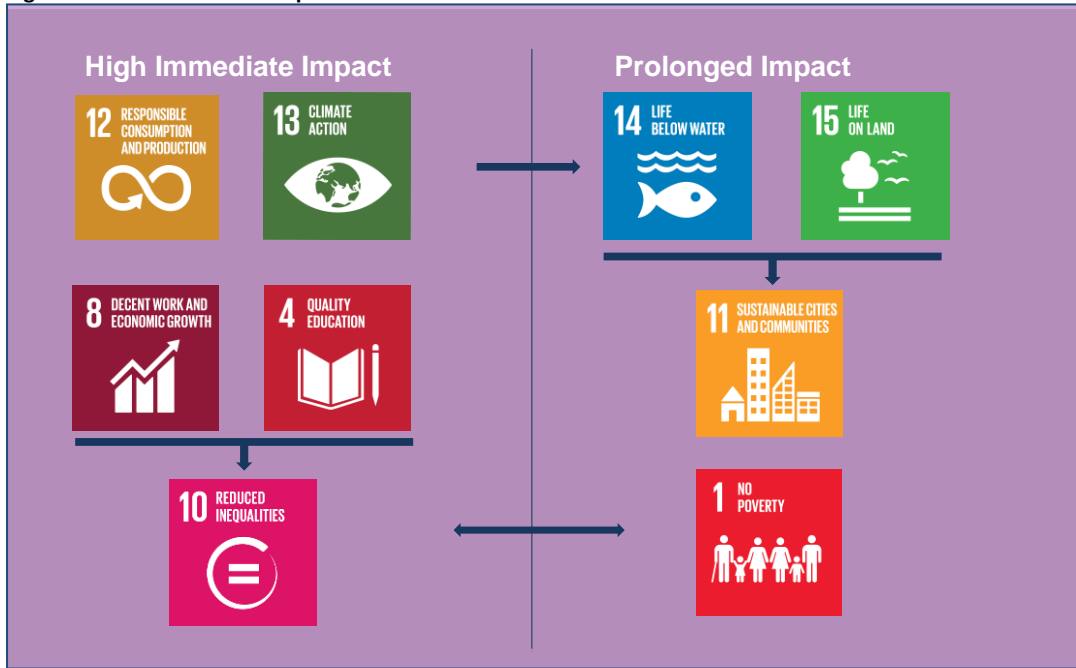
Figure 6.4 Frameworks for Sustainable Tourism Development

Figure 6.5 Spatial Layouts of Tourism Assets

Legend

Airports
- ✈ International
- ✈ Domestic
- ✈ Airfield
- ⚒ Salt Mine
- ● Gurudwara
- Shrine

- National Park
- Wildlife Sanctuary
- Game Reserves
- Barrage
- Head Works
- ○ Settlments
- Fort

CPEC Route
- Eastern Alignment
- Central Alignment
- Western Alignment
- Forest
- Lake
- River
- Motorway
- National Highway

175
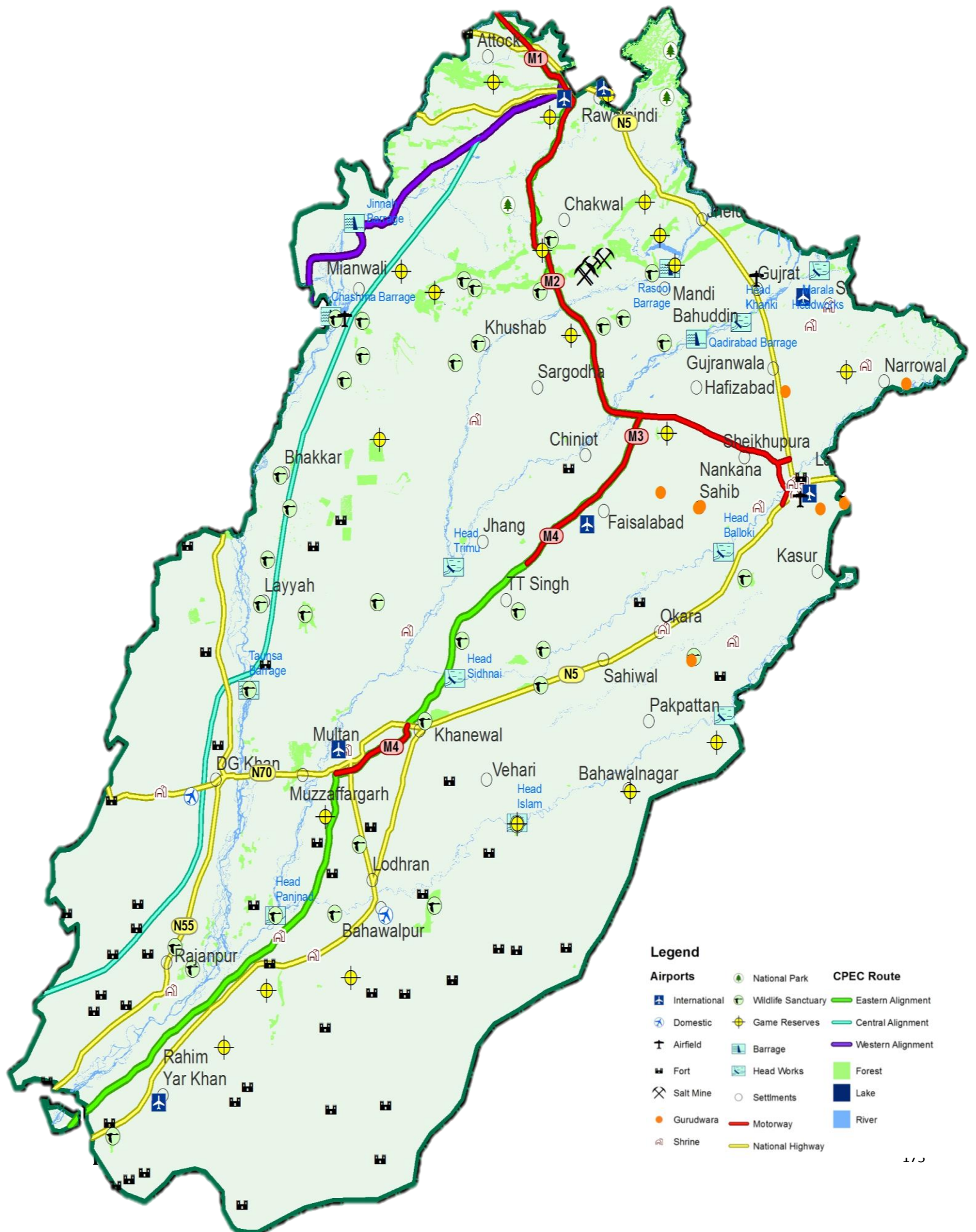
Methodology: In order to understand tourism in spatial terms, it is necessary to identify patterns of tourism activity. There is a plethora of literature that supports the development of clusters with distinct characteristics and tourism assets for accomplishing sustainability, income generation, emergence of commerce in hospitality services and the development of a global brand. The idea of benefits accruing from clustering and agglomeration that support economic and regional development was initially postulated by Michael Porter in his 'Diamond Model' theory. His work has been extensively adopted by organization such as the OECD, EU, national and local governments the world over. Porter conceptualized a 'competitive diamond' of factors that, he claimed, influence a country's competitive performance in international market[3]. Policy makers are generally seeking sustainable ways to improve the socio-economic competitiveness of a city or a region. The contemporary research supports the positive association between the competitiveness and development of regions and its tourism assets, especially in relation to enhancement of cultural heritage and other tourist activities in cluster arrangements. The research by Alberti and Giusti, supports the formation and development of clusters where tourism and cultural heritage are tied with the regional competitiveness. They analyzed a formation and development of a cluster from 1999 to 2011, using a longitudinal case study of the Motor Valley cluster in Modena, Italy. The selected case allowed a perspective on the importance of a regional identity and heritage in the development of the Motor Valley cluster. The different stakeholders such as the firms in the motor industry, artisans, tourism institutions, sport infrastructure (racetracks, circuits) and tangible and intangible cultural heritage are tied together benefitting each other and buttressing the regional competitiveness. This case suggests how to leverage the assets of local industrial heritage in order to develop a cluster formation and increase the overall competitiveness of the region. Development of tourism assets can be used to enhance various forms of cultural heritage. This development goes beyond the traditional industrial heritage to other cultural festivities (e.g., carnivals or festivals), artistic legacy (e.g., performing arts and material artistic assets) and so on[4].

The formation of tourism clusters cannot be done in seclusion due to the onset of globalization. This has brought upon the need to identify factors that promote destination competitiveness and multinational activities in a global economy. Most developing countries face international competition for tourism markets and are vulnerable to global socio-political and economic situations. The next pivotal step after determining the link between tourism development and regional competitiveness is to embed the factors of development of global competitiveness in the current tourism cluster model. Kim and Wicks in their 2010 research titled 'Rethinking Tourism Cluster Development Models for Global Competitiveness' have identified the deficiencies in the traditional cluster models and recommended improvements to

make them at par with global tourism standards. These following three key issues need to be taken into account: tourism related FDI in tourism cluster development in emerging countries that are highly challenged by global competition, (2) the critical role of interconnections between all cluster actors in both competition and cooperation, and (3) the distinction between condition factors and cluster actors in the model by separating each other. Their research provides practical insight for policy makers to develop and employ a calculated plan for tourism cluster development. The plan should be an integrated system for achieving the sustainable development of natural and cultural environments, business in the tourism destinations, and local and regional economic advancement. They also support the idea of government officials to strengthen collaboration between all cluster actors and highlight the effectiveness of the cluster-based approach as a way to enhance sustainable tourism clusters [5].

Additionally, clusters that are sustainable and are effectively utilizing local resources can ameliorate regional income disparities. In China, tourism clusters which are tandem with porter's diamond model are being sought out as the solutions for the low touristy activities in the inland regions. There are significant differences between the inland and coastal regions on the socio-economic parameters, compelling the government to look for tourism cluster development in the inland regions of China. Application of Tourism Cluster development can indeed yield economic dividends when the local dynamics are also taken into account. Factor endowments such as cultural heritage, scenic landscapes along with related and supporting industries and the necessary demand conditions are needed for clustering. There should be an emphasis on developing vertical and horizontal linkages incorporating private/public sector partnerships and partnerships between international, national and locally owned businesses. [6]

The development of clusters should not be viewed as a simple process that can be achieved on an ad-hoc basis. Due to the sheer number of stakeholders from the public and private sector and the complex processes involved, the achievement of cluster development is a long-term commitment that requires strong stakeholder collaboration. Novelli, Schmitz and Spencer have stressed on this fact in their 2006 research on development of networks, clusters and innovation in the UK tourism industry. The decline of the tourism sector in the UK was leading to loss of revenue and associated jobs. Therefore, a cluster-based approach was applied through a pilot exercise conducted in the East Sussex, South East region of the UK. The pilot exercise aimed to increase the integration between sectors such as accommodation, hospitality (including accommodation and restaurants), producers of local goods/crafts, attractions, transportation, sport facilities, local

[3] John Swords, (2013) Michael Porter's cluster theory as a local and regional development tool: The rise and fall of cluster policy in the UK. Accessed from
https://journals.sagepub.com/doi/abs/10.1177/0269094213475855
[4] Fernando G. Alberti, Jessica D. Giusti (2012) Cultural heritage, tourism and regional competitiveness: The Motor Valley cluster Accessed from
https://www.sciencedirect.com/science/article/pii/S1877916612000562

[5] Namhyun Kim, Bruce E. Wicks (2010) Rethinking Tourism Cluster Development Models for Global Competitiveness International. CHRIE Conference-Refereed Track Accessed from
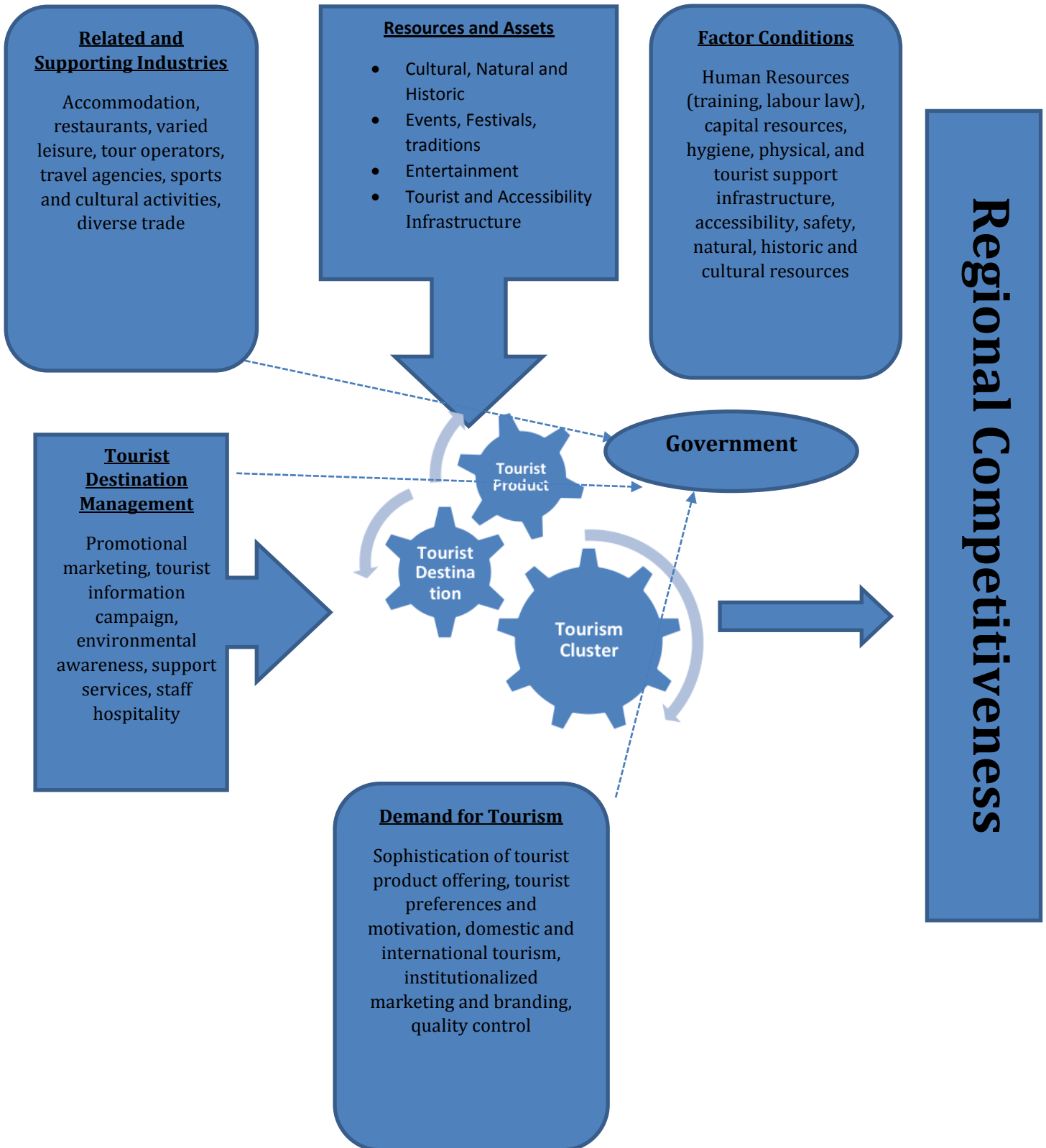https://scholarworks.umass.edu/cgi/viewcontent.cgi?article=1370&context=refereed
[6] Julie Jackson (2006), Developing regional tourism in China: The potential for activating business clusters in a socialist market economy Accessed From
https://www.sciencedirect.com/science/article/pii/S0261517705000270

authorities, SMEs. All of these cluster actors cooperated and competed under a theme— 'Healthy Lifestyle[7].

The existing literature lends support to the idea of development of tourism clusters to achieve balanced and sustainable regional tourism development. The lack of a provincial tourism policy has allowed unconnected and shortsighted projects that do not leverage the existing tourism potential. The PSS aims to leverage the existing tourism assets by identification of spatial distribution of the tourism assets of Punjab. A clustering approach following the Hub and Spoke model has been utilized to develop the regional competitiveness of the proposed tourism zones. The figure below depicts an understanding of clustering that leads to development of regional competitiveness. Punjab can cater to domestic and international tourism demand through the development of clusters.

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[7] Novelli, Birte Schmitz, Trisha Spence (2006) Networks, clusters and innovation in tourism: A UK experience Accessed From:
https://www.sciencedirect.com/science/article/pii/S0261517705001913

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Related and Supporting Industries

Accommodation, restaurants, varied leisure, tour operators, travel agencies, sports and cultural activities, diverse trade

Resources and Assets

- Cultural, Natural and Historic
- Events, Festivals, traditions
- Entertainment
- Tourist and Accessibility Infrastructure

Factor Conditions

Human Resources (training, labour law), capital resources, hygiene, physical, and tourist support infrastructure, accessibility, safety, natural, historic and cultural resources

Tourist Destination Management

Promotional marketing, tourist information campaign, environmental awareness, support services, staff hospitality

Tourist Product

Tourist Destination

Tourism Cluster

Government

Demand for Tourism

Sophistication of tourist product offering, tourist preferences and motivation, domestic and international tourism, institutionalized marketing and branding, quality control

Regional Competitiveness

Moreover, identifications of regions which have strong tourism infrastructure and which areas need more investment is needed to bolster tourism. The tourism index ranks districts numerically according to ten subcategories. This is a preliminary research aimed with the objective of providing a basis for a strategy. This conceptual framework can be developed further in the future as more tourist data is maintained and made public. In the current absence of head-counts and consumer preferences this is a first step to identify spatial potential for tourism cluster development.

Variable	Variable Description
Airports	Measures direct air connectivity of the district.
Land Connectivity	Measures road network of district, whether the district is connected to a major highway or motorway.
Historic Sites	Presence of historic sites, especially current and potential UNESCO World Heritage Sites.
Parks and Reserves	Presence of National Parks and Forest Reserves in the District.
Sanctuaries	Wildlife sanctuaries in the district.
Water Bodies	Presence of major river, dam, barrage or Head Works for water tourism.
Religious Sites	Presence of shrines, gurdwaras, mosques and temples in a district.
Presence of an Old City	Ranks districts according to the presence of old, walled cities that provide heritage tourism.
TDCP Presence.	Ranked according to TDCP motels, restaurants and rest stops in the district.
Hotels	Major hotel network in the district for tourist accommodation.

Outcome: The spatial distribution of the Tourism assets of Punjab is dispersed around three distinct regions. The city of Rawalpindi can be seen as the central node for the northern cluster. The main attraction of this cluster include the hill stations of Murree and relatively unexplored potential of Attock district, stemming from its natural beauty and potential for Sikh tourism. The Soon Valley and Kalar Kahar range have the potential to accommodate substantial load of local tourism and should be developed as a distinct and sustainable intervention zone. Lahore has its own significance as a central city and hub of culture, arts and urban-tourism. Furthermore, it's envisioned that the city of Lahore will function as the main international gateway. Hence, it is better to consider it as a stand-alone node with improved connectivity to attractions in the vicinity for example Gujranwala as a destination for food or Nankana as a destination for Sikh Tourism. In the South of Punjab Multan and Bahawalpur have immense potential for tourism development individually and can provide the node function for the South region. Through these nodes, in similar fashion to Lahore, connections and tourism infrastructure can be provided to the Cholistan region and the Sulaiman mountain range. In the Cholistan region a trail can be built around the remnants of the Bahawalpur sultanate.

The detailed ranking of the districts of Punjab based on their Tourism Potential is given on the next page. Followed by a depiction of the Proposed Zones based on above findings.
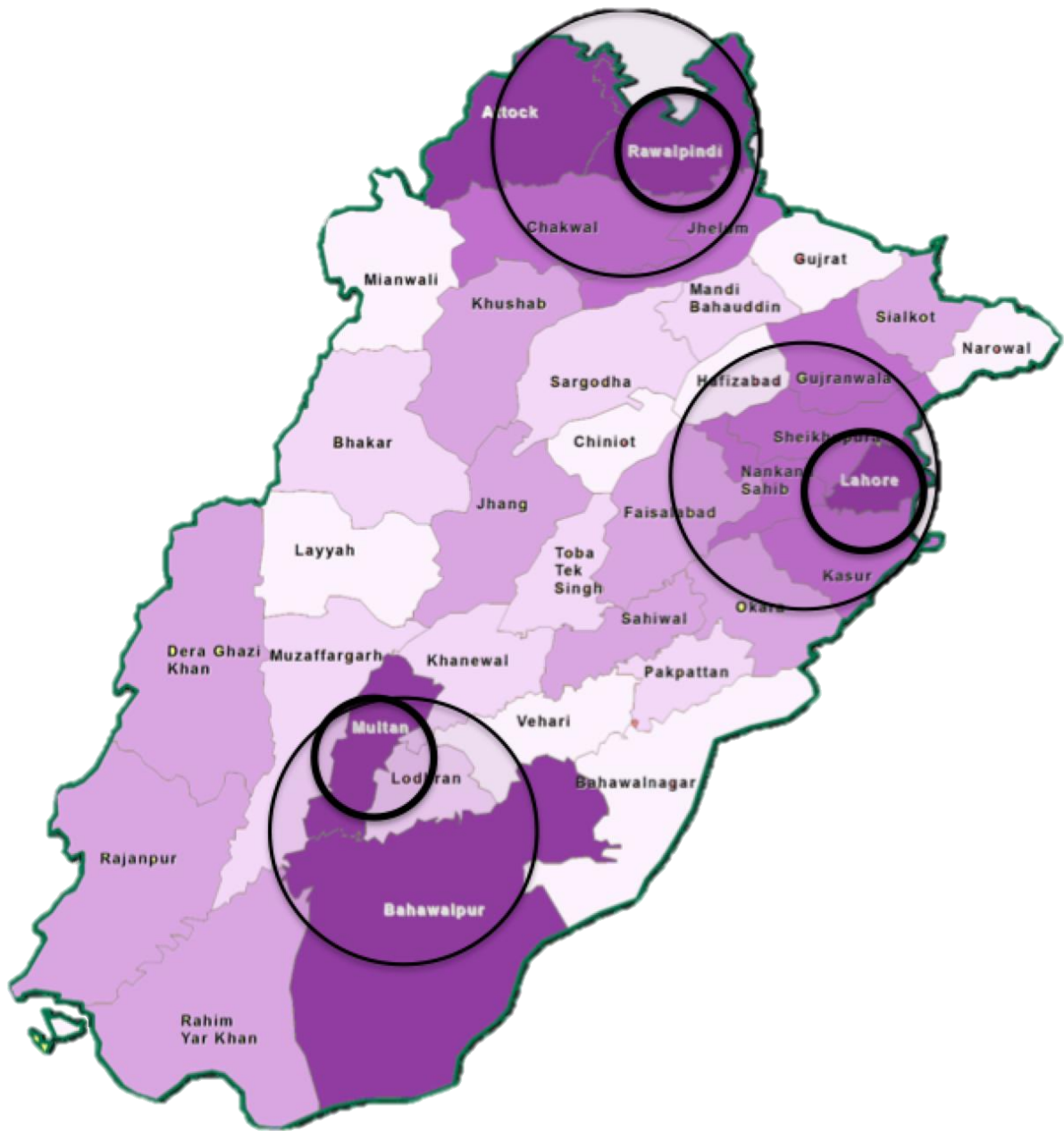
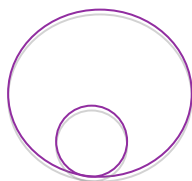**Table 6.1 District Score on Existing and Potential Tourism Assets**

Sr. No.	District	Total Score
1	**Attock**	65
2	Bahawalnagar	25
3	**Bahawalpur**	88
4	Bhakkar	28
5	Chakwal	55
6	Chiniot	28
7	Dera Ghazi Khan	45
8	Faisalabad	48
9	Gujranwala	51
10	Gujrat	26
11	Hafizabad	23
12	Jhang	38
13	Jhelum	55
14	**Kasur**	68
15	Khanewal	33
16	Khushab	43
17	**Lahore**	95
18	Layyah	23
19	Lodhran	28
20	Mandi Bahauddin	28
21	Mianwali	23
22	**Multan**	85
23	Muzaffargarh	28
24	Narowal	23
25	Nankana Sahib	58
26	Okara	41
27	Pakpattan	33
28	Rahim Yar Khan	43
29	Rajanpur	43
30	**Rawalpindi**	88
31	Sahiwal	40
32	Sargodha	38
33	Sheikhupura	45
34	Sialkot	38
35	Toba Tek Singh	33
36	Vehari	18

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Figure 6.6 District wise Tourism Potential

Tourism Zone and Hub

High

Low

Tourism Potential

Tourism Zones

Legends

Airports
International ✈

Natural Tourism Sites
National Park 🌲
Wildlife Sanctuary 🦆
Game Reserves ✛
Salt Mine ⛰
Barrage 🏭
Headworks 🌉
Forest ▮
Lake ▮
River ▮

Heritage Sites
UNESCO World Heritage Sites ◉
Tentative UNESCO World Heritage Sites ◉
Shrine 🕌
Gurudwara ☬
Fort 🏰

Proposed Tourism Zones
Lahore Zone ▮
Northern Zone ▮
Southern Zone ▮
Fort Monroe (Alternate Hill Destination) ⬤
Soon Valley (Eco-tourism Zone) ⬤

Figure 6.7 Identified Tourism Zones

6.2 PROPOSED TOURISM ZONES

6.2.1 Southern tourism zone

The area has the most severe climate of the whole of Punjab, receiving scarce rainfall and soaring temperatures in the summer. The geography varies from sand deserts, alluvial plains to dry mountain ranges. At this stage of the Indus' journey from the Himalayas the river has a vast expanse, reaching a bed width of more than 10 km.

The human settlements in this area have natural constraints on both the West and East. Towards the East settlements are limited by the barren desert of Cholistan locally known as *Rohi*, an extension of the vast Thar Desert , while the Sulaiman Mountain Range on the West has limited settlements in that direction. Major settlements are around the Indus River Basin and have historical roots. The majority of the population is settled closer to the rivers. The population is ethnically diverse ranging from the tribal population adjacent to DG Khan to the nomadic desert dwellers of Cholistan and a *Siraiki* & *Punjabi* speaking populace.

The ancient cities of Bahawalpur and Multan have tremendous historical significance stemming from their status in the princely-state era. This area has historically been the epicenter of Sufi thought and numerous shrines dot the region.

The City of Bahawalpur was the capital of the state of Bahawalpur and the remnants of that period adorn the city and give it, it's charm and unique flavor. The people of the city are very resourceful and proud of their heritage; in recent times an indigenous effort to revive the old walled city has been underway. The city of Bahawalpur is attractive for tourism as it is a living ancient city that has not fallen prey to urbanization and still has a "small-town" appeal.

Assets:

- Unique desert landscape, advantageous for adventure tourism
- A collection of Shrines of Sufi saints especially around Multan City. Which are responsible for local festivities.
- A chain of Forts on the Eastern and Western Borders of this region
- Lal Suhanra National Park: Flora and Fauna
- Indus River Basin: Potential for Adventure Tourism
- Connectivity through National Highways: N5 Highway
- Airports: Multan, Bahawalpur, DG Khan
- Fort Monroe has prospects as a Hill station for South Punjab.

Constraints:

- There is an utter lack of allocation of funds towards the development of tourism. Especially in southern Punjab.
- The climate of the region is not conducive of tourism activities in the summers.

- The area is generally lagging behind in development compared to the rest of the country on multiple dimensions including economic output, income disparity and the quality of Human Capital.
- The connectivity of the region is limited and dilapidated, apart from the major Urban Centers.
- The area has one functional international airport at Multan, but the frequency and diversity of incoming flights is limited.
- Due to the climatic conditions the area is sparsely populated in comparison to the rest of Punjab, thus the population base for localized tourism and recreation is limited out side of main urban clusters of Bahawalpur and Multan.

Recommendations:

- **Development of a Zone Circuit**: Multan City should be developed as the center for the Southern Tourism Circuit. The Tourism agencies of the government need to design a tourism loop / tourist circle for the region. This circuit may begin at the central location of Multan, have checkpoints at, Bahawalpur, Derawar and concluding at Fort Monroe.

- **Revamp of Connectivity**: Multan Airport needs to be revamped to accommodate international flights and the aviation authorities may want to take steps to increase the frequency of direct international flights to Multan. The facilities at the airport need to be oriented towards welcoming local and international tourists.

- **Multan-Bahawalpur Linkages:** There needs to be frequent buses leaving from the Multan Airport to Bahawalpur City. This may be taken up by the TDCP.

- **Regional Branding:** Cholistan Specific branding needs to be initiated in addition to an overall marketing campaign for the province of Punjab.

- **Incorporation of Water Features:** The riverbed areas close to the cities may be incorporated as a water feature for the cities population. This will not only improve the livability credentials of the city it will also boost domestic tourism for the local population.

- **A Hill Destination for the South:** The development of Fort Monroe as a destination resort for Southern Punjab. There is considerable population in the southern half of the province, and it makes a lot of economic sense to have a regional hill station for this populace. From an inclusivity point of view it might cost less for the people of the southern part of the province to visit Sulaiman mountain range instead of the Margalas or the Himalayas.

- **Desert Adventure Tourism:** The concept of Desert Safari needs to be incorporated. Currently there is the annual Cholistan Jeep Rally, which does attract a lot of tourist and media attention; this asset needs to be made readily available during the course of the

year so that an economy can emerge around this activity. A suggested approach is to do a tour of the various forts dotting the Cholistan region.

- **Development of Sufi Shrines:** The development and maintenance of Sufi shrines can prove instrumental in the revival of tourism in this region. A revamp of the facilities at these locations will prove beneficial for local visitors which form the bulk of our tourism market. Providing people opportunities to practice their festivals in a more organized manner will not only enhance the experience for the locals but will also provide an opportunity to capitalize by attracting foreign visitors.

6.2.2 Lahore tourism zone

Lahore is an ancient city, which was founded around 2000 years ago. Lahore is the cultural hub of Pakistan and the administrative capital of Punjab. Lahore was the seat of the Mughal Empire at its highest point during the reign of Emperor Akbar. It is also referred to as the City of Gardens for its impressive public parks. The Walled City of Lahore is a UNESCO World Heritage Site. This was the capital of the Mughal Empire which spanned most of India. Mughal Architecture is synonymous with the beauty of Lahore. The Lahore Fort, Shalimar Gardens, Badshahi Mosque, Shish Mahal and Jahangir's tomb are majestic monuments built during the Mughal era. Lahore has been at the heart of Sikh, Hindu, Buddhist and Muslim empires and every inch of this beautiful city is deeply embedded in history. Lahore also boasts impressive colonial era architecture such as Aitchison College, GPO, Mayo Gardens, Bagh-e-Jinnah and Charing Cross. Sufi shrines are abundant in Lahore and the annual Urs at Data Darbar is a major event in the city. Wazir Khan Mosque built by Emperor Shah Jehan is the ornate pinnacle of Mughal architecture and is a prominent site in Sufi Islam. The Minar-e-Pakistan and Iqbal Park represent a great tourist attraction as the site of the Pakistan Resolution. Lahore has immense potential to develop its religious tourism with sites such as Bibi Pak Daman, Wazir Khan Mosque, Tomb of Ali Mardan Khan and Neevin Mosque. Lahore is a modern city with an extensive system of hotels and restaurants. The Sightseeing Lahore Tour operates a bus service with an open roof bus which shows tourists a glimpse of both Old and New Lahore in all its glory. Lahore Museum is a microcosm of Pakistan's entire history and is adorned by a breathtaking mural from renowned artist Sadequain. The Walled City and Lahore Fort need special attention from the government and NGOs to ensure that they do not deteriorate. Modernization of the transport system near the Old City should make this cultural hub more accessible; however, great care needs to be taken by the government so that urbanization does not endanger the rich history of the Walled City and its surroundings. Lahore also has a canal traversing through it with trees lined on either side, which adds to the scenic beauty of the city. **It is a city, which has the ease of modernity and the charm of history, and this balance can make Lahore an immense global tourist attraction.**

Assets:

- A collection of historic (Mughal), religious and urban assets in the form of architecture and Buildings
- A chain of Sikh religious sites in the area
- Numerous Parks of Lahore
- Ravi River Basin for Adventure Sports
- Connectivity through National Highways: N5, CPEC Routes and M2 Motorway.
- Lahore Airport
- Punjabs Fertile Agriculture Landscape outside of Urban Center.

Constraints:

- Slum Urbanization

- Expensive Real Estate impact on cost effecincy of Tourism Projects

Recommendations:

- **Development of a Brand Lahore and Tourism Circuit:** Lahore City should be developed as the center for the Lahore Tourism Circuit. The Tourism agencies of the government need to design a tourism loop / tourist circle for the region. This circuit may begin at the central location of Lahore, having connectivity and daily bus ride options to all the attractions within the city and its outskirts e.g. Nankana and Hiran Minar. Like numerous international cities Lahore has the necessary ingredients to develop as a Brand City.

- **Lahore Airport Connectivity to the City:** Lahore airport should be established as the center of this tourism node focusing on international standards at the point of contact for all tourists and business visitors. The airport needs to be connected to all local transport plans and main lines of public mass transit.

- **Center for Tourism FDI:** Lahore should be the center of Tourism Expos and Seminars in the region so that international investors can be brought onboard for local developments. The rationale for Lahore to be the center of such activities is that many of the historic assets of the city are quite close to the city center and with the improved infrastructure around the city it is the primary showcase city of Pakistan.

- **Urban Tourism:** Lahore also has the opportunity to develop itself as the center for Urban Tourism. With the assets of a living old city and a modern metropolis it has the right mix to be a standalone attraction for Tourism. Istanbul has been able to develop successfully such a product from a similar product offering. Thankfully projects like Walled City are already helping restore and improve the standards of Old City, increasing its capacity to be presentable for n international audience.

- **Entertainment and Leisure:** Already Lahore is the center for the dying film industry of the country and the remains of Theater. These two industries need to

be revived in accordance to international appetites so as to have a more global appeal.

- **Walkability and Streetscapes:** All global cities are now moving towards means of transportation that involve people's interaction with the city; in the form of walkability and cycle lanes. Lahore needs to adopt a similar framework so that people can truly enjoy what Lahore has to offer. This can be started as a pilot project in the Old City. Further, many of the municipalities in the world provide funding for streetscape restoration and maintenance this enables business to maintain standardized storefronts adding to the positive externalities to the city.

6.2.3 Northern tourism zone

The Northern Tourism circuit includes the rich history and culture of the Potohar Plateau with cities such as Rawalpindi and Taxila. Further north this area borders Murree and the Galiyat which are perfect for tourism due to the pleasant climate and beautiful alpine forests. However, much of the tourism potential of the Northern Circuit is being overlooked. With the construction of the Murree Dual Expressway, there is great potential for year-round tourism in the Galiyat. A strong marketing campaign could see Rawalpindi and the surrounding Potohar Plateau become a hub for foreign tourists.

Murree: Murree was termed as Queen of the Hills by the British government and has been the most visited hill station in Pakistan. Murree enjoyed a reputation as a resort town due to its proximity to Lahore and its beautiful European style villas. Murree is located at an elevation of 7,517 feet above sea level. The beautiful hills of the lower Himalayas along with picturesque valleys and breathtaking views make Murree one of the most popular tourist destinations in the summer. The famous Murree Mall Road is a tourist hub which generates a lot of economic activity for the region. Families come to shop along the beautiful sloping road where they can dine at restaurants and enjoy hot beverages as they shop the wide range of handicrafts; carpets, shawls and silks that are on display. An extensive system of TDCP rest houses line the beautiful meandering roads lined with alpine trees.

Attock: Attock has always been a vibrant cultural centre. Attock has also been at the crossroads of the Sikh Empire and British India. Ranjit Singh captured Attock Fort in 1813. The fort has been preserved as a UNESCO World Heritage site, signifying its cultural and historical importance. Another place of note is Begum Ki Sarai or Behram Ki Baradari. This is a Mughal era monument built by Behram Khan in 1681 near Attock Fort and River Indus. It was built by Behram during the height of his chieftancy and is situated at the ridge of mountains on the southern side of G.T. Road near Attock Khurd. Conservation work was started on this site in 2006 but there is no sign of progress as of yet. The Old Tomb of Attock Khurd has also been identified by the Archaeology Department as a target for conservation. It is also known as 'Hakimon ka Maqbara' and is the tomb of Mughal emperor Akbar's minister and superintendent of construction, Khawaja Shamsuddin Khawafi. He constructed the tomb for himself in 1589 (Jang). Hassan Abdal is a historic city located in Attock district which is home to Gurdwara Sri Panja Sahib. Panja Sahib is one of the most sacred places in Sikhism and plays hosts to thousands of Sikhs every year. One of the incredible things about Attock is that Panini, the great Sanskrit grammarian, was born here. Panini wrote the Astadhyayi, which lists the 3959 rules of morphology, syntax and grammar of Sanksrit (Staal). Attock may then be seen as the birthplace of linguistics itself. Attock could be an important site for heritage tourism as one of the oldest cities in Asia.

Patriata: Patriata is a beautiful resort at the highest point in Punjab where TDCP has developed a Chairlift and Cable Car Experience for tourists to enjoy. This attraction provides incredible views of Murree and its surrounding galiyat, which is unrivalled in the entire province. Patriata is easily accessible via the Murree Expressway.

Ghora Gali: Ghora Gali is a mountain resort town close to Murree. Ghora Gali offers a more nature intensive experience of the Galiyat with extensive tracks winding through evergreen forests. Ghora Gali has a number of TDCP restaurants and rest houses for tourists who want an escape from the hustle and bustle of Murree and would rather spend their day sitting in beautiful gardens while enjoying the beautiful alpine views.

Bhurban: Bhurban is located between Murree and Kashmir Road at a height of 6000 feet. It is a beautiful resort town which is 9 kilometers away from the urban center at Murree. Bhurban is famous for its golf courses and wildlife. A number of high end tourist resorts, most notably Pearl Continental Bhurban are found here. These resorts also feature resplendent hiking trails for adventure tourism.

Rawalpindi: Rawalpindi is the fourth largest city of Pakistan and is an important and industrial and cultural component of Pakistan. Rawalpindi boasts a rich and vibrant history as a part of the Gandharan Empire and can be a great site for heritage tourism especially with its proximity to Taxila. Rawalpindi has a number of Hindu temples which need to be restored and preserved to maintain the cultural heritage of the area. Rawalpindi is one of a dozen HUL (Historical Urban Landscape) pilot cities around Asia and the only historic city selected by UNESCO. Rawalpindi is a world heritage site with beautiful temples like Krishna Mandir and Ganjmandi. There are also several abandoned temples in Bohar Bazaar, Purana Qilla and Bhag Sardaraan. Rawalpindi's multi-religious heritage is under threat of dissipation and it needs strong action by municipal and tourism authorities to make the city a major tourist location. Rawalpindi and the surrounding Potohar Plateau region can also seriously be developed and promoted as a Hindu-Buddhist heritage trail.

Taxilla: Taxila near Rawalpindi is a UNESCO World Heritage Site and its historical importance may be even greater than Harappa. Taxila was the capital of the great Gandharan Empire. It was also the crossroads for Buddhism's reach into South and Central Asia and there is a great deal of potential for cultural tourism as it is of great importance to Buddhism. Taxila also features prominently in Hindu scripture especially in the Mahabharata. Taxila contains the ruins of ancient Persian cities built by King Darius I which have not been excavated properly. Taxila has the potential to be one of the great ancient ruins which could attract an enormous amount of

tourism. There needs to be a significant investment in archaeology and literature to harness Taxila's historical significance. It was also the site of one of the world's first universities and is known to be a great center of Buddhist learning. Investment in Taxila is needed to develop the 18 archaeological sites into a major tourist attraction.

Recommendations:

- **The Gandharan belt** needs to be revived and tourist resorts should be made all along the Potohar Plateau. This area has the highest archeological tourism potential in all of Pakistan as it derives its historical routes and influences from many different civilizations. Modern day states that practice Budhism should be targeted for this product.

- **Religious Tourism**: Sites like Katas Raj, Panja Sahib and Krishan Mandir need to be preserved and advertised. This multi-ethnic history is a resource that needs to be made part of the contemporary identity of Punjab and highlighted for a more tolerant image of Punjab.

- **Adventure Tourism:** This region has great potential for the development of adventure tourism sites. Geographically it is blessed with terrain that is conducive for many adventure sports and activities, such as paragliding, camping, trekking, boating, observing wildlife and conservation tourism. Separate plans for these avenues need to be developed and implemented.

- **The New Islamabad Airport**: This airport is upto the mark when it comes to global airport standards and a great point of entry for international tourists. The airport needs to have direct travel arrangements to the major hotels and a one window facilitation especially for international tourist arrivals.

- **Clean the Galiyat** :Murree should go through an extensive clean-up operation and environmental efforts should be concentrated on keeping the galiyat pollution-free so that they maintain their tourism potential.

- **Urbanization in the galiyat** should be controlled to an extent as the number of restaurants and urban centers in Murree has already destroyed much of the tourist appeal of the Murree hills.

- **Catalogue Resources:** Numerous heritage sites are found in the Northern Belt, which have not been catalogued methodically. These heritage sites could be developed into a religious tourism Circuit for both foreign and local tourists.

- The Potohar Plateau has very little TDCP presence and is essentially an unchartered territory. There needs to be a focused programme for the development of tourism activities in the area.

6.2.4 Actions required and targets

The Ministry of Tourism in Punjab should develop an effective policy in line with Federal tourism policy. These policies should also be prepared in accordance with the guidelines provided by the Provincial Tourism Board as recommended by us in the previous section. Broadly, the policy should attempt to:-

1. Position tourism as a major engine of economic growth. There needs to be a consensus among all the stakeholder departments including Tourism Development Corporation of Punjab, Youth Affairs, Sports, Archaeology & Tourism Department, Auqaf & Religious Affairs Department that tourism sector is a mutual priority. This is very crucial as the points of interest often fall under the jurisdiction of different departments, for example many of the establishments of the TDCP are built on land owned by the Forestry Department. TDCP might be given an exalted status instead of establishing yet another layer of organizational hierarchy to manage this coordination. This necessitates the professional development, capacity building and standardization of the existing TDCP. For this to be realized there needs to be an increase in allocation to tourism projects.

2. Control the direct and multiplier effects of tourism for employment generation, economic development and revamping the local tourism scenario. This translates to an increased focus on vocational training and resource development so that the necessary workforce is available for this sector to flourish. There is room for partnerships in this realm with various hotel management, culinary and finishing schools.

3. Focus on domestic tourism as a major driver of tourism growth; as consumer spending becomes a key driver of our economic engine, it is evident that the spending on leisure activities will also rise. This increase needs to be harnessed through the development of newer sites, such as Soon Valley and Fort Monroe, plus better urban spaces to promote urban tourism.

4. Position Punjab as a global brand to take advantage of the growing global travel trade and the vast untapped potential of Punjab as a tourist destination. It is important that there is cohesion between national and provincial tourism policy.

5. Create and develop integrated tourism circuits based on Pakistan's unique civilization, heritage, and culture in partnership with private sector and other agencies. These Zones needs to be developed from the lens of developing a product for the Tourist. Its operational plans need to be developed with travel times and tourist comfort as the focus, facilitating the emergence of tourism clusters.

6. Develop the three tourism zones based on hub-and-spoke model so that distinct assets potential is developed in the form of clusters. One-day tourism destinations around Lahore, Rawalpindi and Multan should also be developed. Moreover, urban centers should include tourism areas in their city master plans where hospitality and tourism

investment shall be encouraged through the public and private sector.

7. Promote development of rural tourism. Within the 3 different zones the local rural culture is also starkly different from each other. This provides us the opportunity to develop rural/village resorts. Similar ideas have been implemented in many developing countries; this can directly involve the poorest citizens of the society to provide accommodation and other cultural products directly to the tourists.

8. Acknowledge the critical role of private sector with government working as a pro-active facilitator and catalyst. There is only so much that can be achieved through the public sectors efforts, tourism is a relatively bottom up opportunity. There is imminent potential for large-scale public-private-partnerships in this sector that need to be explored and developed.

9. Support Public-Private Partnership in Tourism infrastructure development. In such a model the locals get a benefit through the establishment of hotel facilities that provide employment opportunities and infrastructure development for the local populace.

10. Develop a one-window operation for tourism that includes visa, travel and boarding. This is of the highest urgency at the national level as embassies are the first point of contact for people aspiring to visit Pakistan.

11. Invest significant resources into restoration and preservation of heritage sites such as, Taxila, Katas Raj etc. Develop Old-city centers on the same model as the Old City Restoration project in Lahore. Especially focused on UNESCO sites identified in each Zone

12. Mass international media campaign based on developing Pakistan and specifically Punjab as a brand, the likes of "Malaysia Truly Asia", "Creative Korea", "There's Nothing Like Australia"

13. Incentivize the development of tourism-based industries; especially small-scale manufacturing of artifacts and souvenirs.

14. Establish a database of tourist visits at various sites, both domestic and international, preferences, origin countries etc to update policy in the future.

15. Develop 2 new Tourism destinations at Fort Monroe and Soon Valley to limit the strain on existing tourism infrastructure based on the principles of sustainability and with a focus on eco-tourism. Connectivity of these sites to major arteries needs to be upgraded. Soon Valley has great potential to be linked to CPEC via Talgang road, expanding the scope of the cluster being developed there. The intervention at Fort Monroe should be developed as an alternate hill destination for Southern Punjab to limit the strain on Murree and Galiyat in the northern zone.

Figure 6.7 Targets for Tourism Development

Indicator	Details & Source	Baseline	Target 2027	Target 2037	Target 2047
Tourist Arrivals	A Provincial Database of Tourist Visits at all sites, both Domestic and International: Starting with FY19	Initiate data collection at tourism destinations across the province.	Improve by 30% of 2019 Baseline	Improve by 60% of 2019 Baseline	Improve by 100% of 2019 Baseline
Public Spending on Tourism as a %age of ADP	Planning and Development Board. ADP Record: Starting with FY19	Initiate Report on Annual Spending on Tourism.	Increase 2 fold	Increase 3 fold	Increase 4 fold

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