

AN EXPLORATORY ANALYSIS OF PAKISTAN TOURISM MARKET: ITS PRESENT SCENARIO, ISSUES, CHALLENGES AND FUTURE PROSPECTS

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ABSTRACT

Tourism industry is a catalyst to bring socio-economic wellbeing to the massis particularly in the developing countries. The main objective of this paper is to examine the issues and challenges faced by Pakistan Tourism Market (PTM) through the application of SWOT (Strength, weaknesses, Opportunities, and Threats) analysis. One of the greatest strengths of PTM is found to be enriched cultural heritage and availability of quality tourist products and services at economical rate. However, the chief weakness is said to be untrained & unskilled labor force, and poor tourist infrastructure. Whereas, the most serious threat to PTM is worsening law & order situation, and political instability. It was further found that Pakistan has the tremendous opportunities in its tourism industry which can be capitalized, therefore, government should put tourism market at priority with respect to allocation of adequate budget to build tourism infrastructure and to devise focused promotional strategies to uplift the image of Pakistan as an attractive tourist destination.

Keywords: Pakistan, Tourism Market, Cultural Heritage.

INTRODUCTION

Tourism is a human and social experience, a resource value, national, regional and local phenomenon, and lucrative economic industry (Nafees, 2008). It is a catalyst for socio-economic development and employment generation especially backward and underdeveloped areas of developing countries. Tourism industry is now globally acknowledged as a major socio-economic contributor. Particularly, Tourism sector is an engine of growth in its all manifestations in the developing countries. Since it generates the jobs and produces incomes to the society. Above all tourism sector could be used to foster harmony and unity among the different communities dispersed in various geographical areas of developing countries. For

developing countries like Pakistan the development of tourism sector is social and economic imperative and would certainly be an impetus to socio-economic growth. The era of tourism in Pakistan has emerged officially after being enrolled in September 1949 as a member of (UNWTO) United Nations World Tourism Organization. International Union of Official Tourism Organization (IUOTO), called later and currently known as World Tourism Organization (WTO). Initially the railway division of Pakistan was handed over the charge of handling tourism matter. In 1956 it was transferred to communications and transport division of Pakistan. In 1959 under the ministry of communications a cell or unit was created and named as Bureau of Tourism; it was then transferred to the ministry of commerce which comes to functioning in June 1960. In the year 1964 the tourism bureau came under the control of civil aviation and tourism. In March 1970, Government set up Pakistan Tourism Development Corporation (PTDC), and subsequently all the major function of tourism bureau were transferred to PTDC. In 1977 once again it was transferred to the ministry of Culture, Sport, Tourism and Archeology. Changing its administration from division to division, it again was transferred to the Ministry of Culture, Sport, Tourism and youth affairs in 1996. This repeated transfer dragged tourism into crisis of leadership and that had heavy adverse effect in efficiency and effectiveness of tourism industry. Presently, Pakistan has the following big corporations / institutions for dealing the affairs of tourism and hospitality industry; Pakistan Tourism Development Corporation (PTDC), Sindh Tourism Development Corporation (STDC), Khyber Pakhtunkhwa (Sarhad Tourism Corporation, STC), Tourism Development Corporation Punjab (TDCP), Pakistan Institute of Tourism and Hotel Management (PITHM), Institute of Tourism and Hotel Management (ITHM), Hazara University, Department of Tourism and Hospitality, and College of Tourism and Hotel Management (COTHM).

TOURISM PLACES IN PAKISTAN

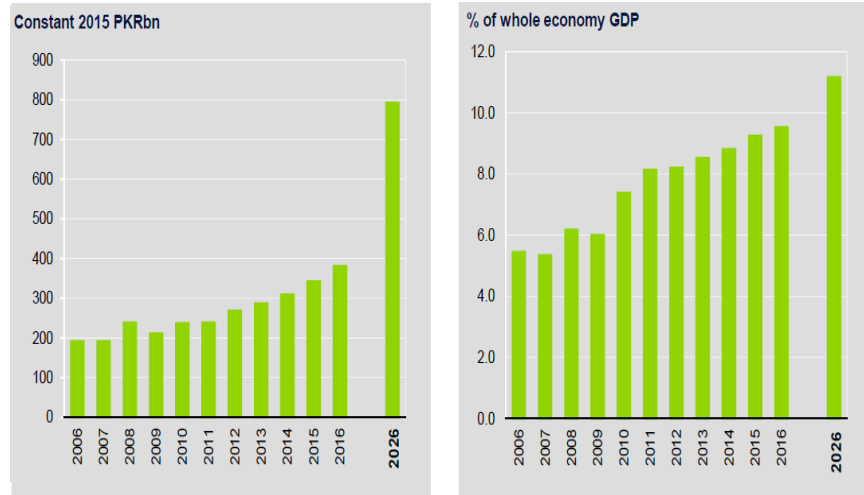
Pakistan is one of the richest countries in terms of tourism offering. Pakistan the home of much of the ancient civilization, ancient empires, monuments, museums, religions and cultural heritage, astound Himalaya peaks, superb valleys, lakes, sea shores, deserts, magnificent landscape and splendid countryside that

challenges and appeals adventure seekers, and nature lovers. Pakistan is spread over the area of 803,950 square kilometers, with population of 180 million, and is split in four geographic regions including plateau in the west, hills in the northwest, plains along the Indus and Punjab rivers and mountain ranges in the north (Karakoram, Himalayas and Hindu Kush). Pakistan is bordered by India, Afghanistan, China, Iran, and the Arabian Sea. It is in this scenario that Pakistan has become one of the most favorable tourist destinations. The most popular tourist attractions in Pakistan include Chitral, Gilgit, Kaghan valley, Lahore, Mohenjo Daro, Swat and Skardu.

THE CONTRIBUTION OF TOURISM SECTOR TO PAKISTAN ECONOMY

Like in most developing countries of the world tourism in many Asian countries is taken as a powerful means of attracting foreign exchange and gives a boost to economy. It brings investment, creates jobs, promotes sales like handicrafts etc. Pakistan being a developing country is rich in both natural as well as historic beauty and has a great possibility of successful economy. Tourism would be of great help to the economic infrastructure due to influx of foreign people and balance of trade (trade balances are a financed flow of trading in goods and services). It can even benefit backward areas in Pakistan, the investment in this sector according to World Travel and Tourism Council (WTTC, 2015), estimated at PKR 342.8bn or 9.3% of total investment in 2015. It should rise by 11.4% in the year of 2016. However, it is expected to rise by 7.6% per annum over the next decade scoring PKR 729.7bn in 2026 (11.2% of the total).

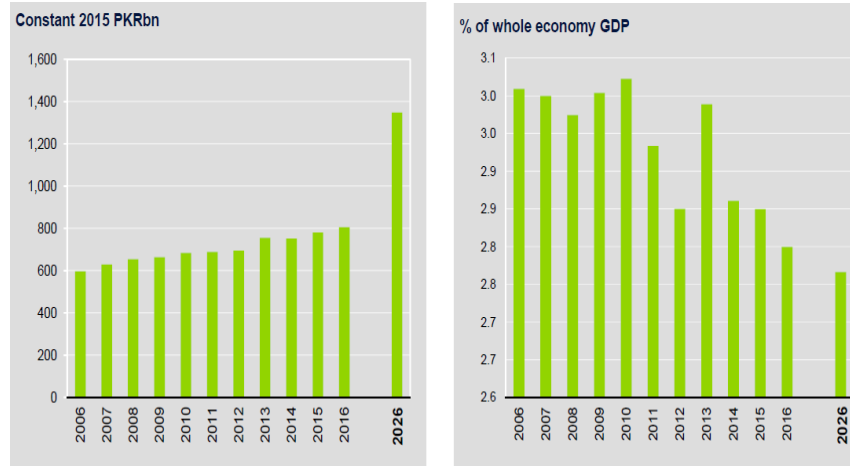
FIGURE-1
CAPITAL INVESTMENT IN TRAVEL AND TOURIS



Source: World Travel and Tourism Council Report, (2016).

The direct contribution of tourism industry to GDP was PKR 780.4bn, (2.8% of GDP) 2015. It is forecast to increase by 3.2% counting to (805.0bn) 2016. This contribution comes from the economic activities of hotel, airlines, travel agents, leisure activities, and other tourist activities supported by tourist visiting Pakistan. On the other hand the total contribution of travel and tourism to GDP was PKR 1,918.5bn (7.0% of GDP) in 2015 and it is expected to increase by 5.2% in 2016, counting for PKR 2,002bn (7.0% of GDP), and to increase by 5.5% per annum to PKR 3,418.7bn in 2026 (As shown in figure 2).

FIGURE-2
DIRECT CONTRIBUTION OF TRAVEL AND
TOURISM TO GROSS DOMESTIC (GDP)



Source: World Travel and Tourism Council Report, (2016).

Subsequently, tourism in Pakistan has contributed a lot to the socio-economic development according the WTTC (2016), the direct contribution of employment support directly 1, 429,500 jobs (2.4%) of the total employment in 2015, and expected to increase by 0.8% to 1,440,500 in 2016, (2.4% of total employment), in similar vein, the travel and tourism 2026, is expected to support for 1,805,000 jobs directly an increase of 2.3% per annum over the next ten years (As shown in figure 3).

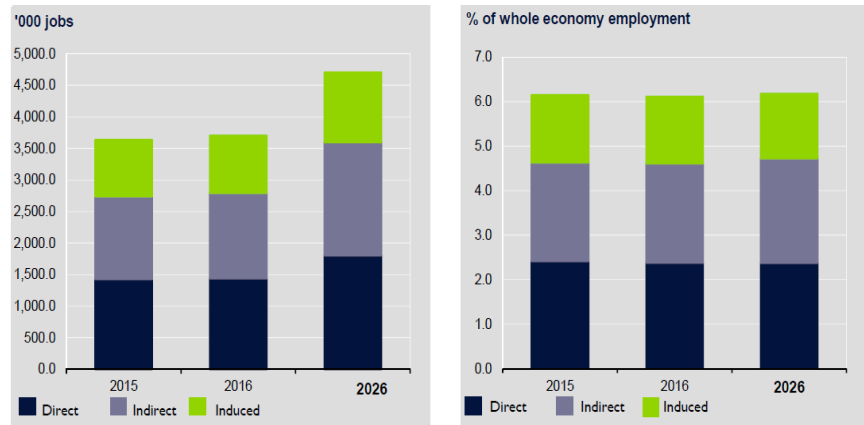
FIGURE-3
CONTRIBUTION OF TRAVEL AND TOURISM TO EMPLOYMENT



Source: World travel and tourism council report, (2016).

However, the total contribution along with indirect job in 2015 was (6.2% of total employment) 3,638,500 jobs, where it is estimated to increase by 1.9% in 2016 to obtain 3,708,000 jobs, (6.3% of total employment), and rise by 2.4% per annum through the next 10 years era counting for 4,707,000 jobs in 2026, (6.2%) of the total employment (As shown in figure 4).

FIGURE-4
TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT



Source: World travel and tourism council report, (2016).

LITERATURE REVIEW

Tourism industry has been researched extensively in developed countries, however, in developing countries it is still relatively unexplored. Jenkins (1980) suggested that tourism is chiefly leisure consumption in developing economics. The tourists consume the money, and that produces job and income to the local inhabitants. In some cases that is the only major source of income to those marginalized inhabitants. Having qualitative labor force has emerged as an important factor in this global world. Since the firms often use employees as a vital source of gaining competitive advantage over their counterparts (Pfeffer, 2005). The competitiveness of the tourism industry can be well known by the training abilities, work force motivation and education; it shows how far the tourism industry can run (Kusluvan & Kusluvan, 2000). According to latest United Nation Development Program (UNDP) report tourism sector as one of the fastest growing sector in the world, however, unfortunately people in

Pakistan are not aware of it. The main reason for slow growth of Pakistan tourism sector was identified as unavailability of skilled labor. Moreover, the key drivers of quality service in tourist industry are found to be employee's attitudes, behavior and performance that in turn lead to customer loyalty and satisfaction (Heskett *et.al.*, 1994). The previous research has evidenced that if the employees in the tourism sector are having the positive attitudes to do their jobs then the objective of the customer satisfaction and loyalty can be well achieved (Rosentbluth, 1991; Zeithaml and Bitner, 1996). The ratio/proportion of the labor force working in tourism industry with the university level degree in tourism and hotel management is lower than other comparable industries (Ajzen & Fishbein, 1980). That means that qualified labor is more attracted towards non tourism industries. The tourist policies in developing countries are mainly made by the government agencies and big tourism corporations. Consequently, the input of local human resources is greatly marginalized. The governmental agencies and big tourism corporations are marred by the corruption and inefficiency. The management of those institutes grossly lacks the knowledge and tourism skills thereby lowering the share of economic benefits to the local people. Moreover, tourism sector is faced with major problems and challenges particularly with respect to the human resources. One of the most severe problems a tourism industry encountered with is lack of educated and trained workforce. According to Nafees (2008), the most valued assets of tourism industry is Human Resources. Therefore it is utmost important that policy should be made at government and corporation levels to provide the labor force with requisite education, skills, knowledge and attitude. For that curriculum in the tourism educational institutions should be revised in order to provide required competencies to the prospective employees. The tourism sector across the globe is encountered with the one common problem that is shortage of skilled labor force (Richardson, 2009). This problem is further exacerbated in the developing countries like Pakistan where tourism sector has been witnessing the serious trouble in recruiting and retaining the quality employees. There are the certain commonly found factors that influence the supply of skilled labor force to tourism industry. Such factors include poor working conditions, lower pay scales, odd working hours, lack of promotional and motivating factors, high employee turnover and a

negative perception for joining the tourism industry by potential graduates (Baum, 2006; Brien, 2004; Deery & Shaw, 1999; Freeland, 2000; International Labor Office, 1989; Riley *et.al.*, 2002). The successful delivery of qualitative services by tourism sector greatly depends on skill and committed labor force (Kusluvan & Kusluvan, 2000). In a recent study Ahmed & Anwar, (2016) worked on the key growth drivers of Pakistan tourism industry. They found that the tourism negatively influences the inflow of tourist in Pakistan. Secondly, the better infrastructure found to be positively associated with the inflow of tourist at the tourist sites of Pakistan. Tan et al, (2016) argued that the importance of tourism industry in the developing countries has been growing because it produces revenues in foreign exchange and it contributes in overall socio-economic development of those countries. The authors evidenced that in the Asian countries the governments investment on the promotion of tourism and building of infrastructure are positive drivers of growth in tourism industry.

RESEARCH QUESTIONS

This study attempts to answer the following research questions:

- What are the key problems that hinder the sustainable growth of Pakistan tourism industry?
- Is there causal relationship between growth of tourism industry and economic growth of Pakistan?

METHODOLOGY

The main objective of this paper is to conduct an exploratory analysis of Pakistan tourism market to investigate the issues and challenges it faces. The data was collected through primary and secondary sources with respect to analyzing the issues and challenges, the interviews were conducted from the managers working in tourism corporations of Pakistan and from the respondents holding key authority positions in government tourism agencies. The data collected through interview was analyzed with the application of SWOT analysis technique. The annual time series data from 1990 to 2012 is taken for tourism growth (i.e. annual tourist receipts in US Dollar to Pakistan) and economic growth (i.e. annual GDP in US Dollar of Pakistan) from Pakistan Economic Survey Various Issues.

The secondary data regarding tourism receipts and GDP in Pakistan was analyzed to Granger Causality test.

RELATIONSHIP BETWEEN TOURISM AND ECONOMIC GROWTH OF PAKISTAN

This part is intended at identifying whether there is a bidirectional or unidirectional causal relationship between tourism and economic growth of Pakistan. The annual time series data from 1990 to 2012 is taken for tourism growth (i.e. annual tourist receipts in US Dollar to Pakistan) and economic growth (i.e. annual GDP in US Dollar of Pakistan). For analyzing empirically the direction of causation between two dynamic variables, the use of Standard Granger causality test has always been preferred (Samina *et.al.*, 2007). The following two equations are developed for testing the causal relationship between tourism growth and GDP growth of Pakistan.

$$(i) \text{ LGDP}_t = \alpha_0 + \sum_{i=1}^n \alpha_{1i} \text{ LGDP}_{t-i} + \sum_{i=1}^n \alpha_{2i} \text{ LTR}_{t-i} + U_t$$

$$(ii) \text{ LTR}_t = \lambda_0 + \sum_{i=1}^n \lambda_{1i} \text{ LTR}_{t-i} + \sum_{i=1}^n \lambda_{2i} \text{ LGDP}_{t-i} + U_t$$

In GDP above equations the causal relationship by estimating equation 1 and equation 2 for testing the null hypothesis that in this case is $\sum_{i=1}^n \alpha_2 = 0$ and $\sum_{i=1}^n \lambda_2 = 0$ against the alternative hypothesis

$$\sum_{i=1}^n \alpha_2 \neq 0 \quad \text{and} \quad \sum_{i=1}^n \lambda_2 \neq 0 \quad \text{for equation 1 and equation 2}$$

respectively. Whereas, if the coefficient α_2 is statistically significant but λ_2 is not statistically significant then the GDP growth caused by Tourism Receipts TR indicating uni-directional relationship. The reverse holds true if coefficient λ_2 is statistically significant and α_2 is not. Whereas, if both the coefficients α_2 and λ_2 are statistically significant that shows causal relationships runs both ways indicating bi-directional relationships.

Standard Granger causality test has major shortcoming that it ignores the properties of the stationarity and co integrating of the time series data, therefore, this study has also applied various test for

checking stationarity and co integrating properties of our sampled time series data.

UNIT ROOT TEST ANALYSIS

TABLE-1
DICKEY-FULLER TEST FOR UNIT ROOT

Dfuller	Lag1	Lag2	Lag3	Lag4
LGDP	2.023	1.000	0.588	0.678
Δ LGDP	(-2.407) λ	(-2.746)*	(-2.838)**	(-2.796)**
LCONT	1.406	0.662	0.573	0.026
Δ LCONT	(-4.203)***	(-4.342)***	(-4.455)***	(-4.302)***

λ Respondents significant at 14%

* Respondents significant at 10%

** Respondents significant at 5%

*** Respondents significant at 0.0%

In order to examine the integrating order of the input series of data of GDP and TR variables, this study applies Augmented Dickey-Fuller Test (ADF). All the data series variables were first tested for stationarity using intercept and time trend, the result of ADF in the table 1 showed that the time series data of the variables GDP and TR are not stationary in their level form, therefore cannot reject the null hypothesis of presence of unit root. Nelson and Plosser (1982), through empirical research accumulated evidences that many microeconomic variables of a country have structures with immense presence of unit root and these authors recommended to apply differences or growth rate to deal with the issues of unit root. Particularly the first difference of the data series of microeconomic variables was preferred as fellows L

$$Z_t = \Delta y_t = y_t - y_{t-1}$$

Where Z_t is said to be stationary at the first difference of Δy_t following Nelson and Plosser (1982), the following equations were used to estimate the unit root test at first difference.

$$(i) \Delta LGDP_t = \alpha_0 + \alpha_{1t} + \alpha_2 LGDP_{t-1} + \sum_{i=1}^n \gamma_i \Delta LGDP_{t-i} + u_{t1}$$

$$(ii) \Delta LTOUR_t = \beta_0 + \beta_{1t} + \beta_2 LTOUR_{t-1} + \sum_{i=1}^n \delta_i \Delta LTOUR_{t-i} + u_{t2}$$

As shown in the table 1 the time series data of GDP and TR are found to be stationary at the first difference thereby rejecting the null hypothesis of non stationarity and therefore the time series data of GDP and TR are fit for use of Granger Causality Test in order to determine whether there exist sustainable long run relationship between the receipts coming from tourism sector (TR) and economic development (GDP) in Pakistan.

TABLE-2
GRANGER CAUSALITY ESTIMATIONS

	Lag 1	Lag 2	Lag 3	Lag 4
LTR* LGDP	0.3301	0.6024	0.7285	0.8037
	(3.20)*	(5.74)**	(7.33)**	(8.56)**
LGDP* LTR	-0.1446	0.3326	0.5387	0.6488
	(-0.88)	(2.31)*	(4.03)*	(5.73)**

*Significant at 5%

**Significant at 0.00%

The granger causality results shown in table 1 portray that all the coefficients are statistically significant with the lags up to four years except one. It is empirically evidenced that from these results there exists statistically significance and strong bi-directional relationship between the growth of GDP and growth of tourism sector in Pakistan. However, with lag one tourist receipts (TR) inflow coming from tourist activities does not influence gross domestic product (GDP), however, it shows its influence on GDP after passing out of one year time series. This sounds relevant in case of Pakistan where the regional and local people get motivated and bring their products and services to the tourist market after a while when the message is spread out that there exist a good demand of the products and services in the tourism market. Since Pakistan economy is more relationship based than market based.

SWOT ANALYSIS OF PAKISTAN TOURISM MARKET (PTM)

The vibrant tourism industry place an important role in socio-economic development of many regions and countries especially in the developing countries with regard to providing employment

opportunities, improving infrastructure, and growing socio-economy. The results of SWOT analysis are presented as below.

STRENGTHS OF TOURISM INDUSTRY

Pakistan tourism sector has tremendous strength to be capitalized to attract national and foreign tourists. The tourist service in Pakistan are relatively much to the foreigners as 1\$ approximately equal to PKR 105. Pakistan is rich in architect archaeological sites, high mountains, old and beautiful culture, handicrafts, and traditional foods. For foreigner tourist it is very economical to shop for handmade carpets, leathers items, traditional shals, embroidered items, jewelry, and much more. Precisely, the strength of Pakistan tourism market includes a rich historical and cultural heritage with the oldest Indus valley civilization like Mohenjo Daro, Mughal era architects, eye catching valleys like swat valley, Glaciers and Himalayan Mountains which could be used for mountaineering and skiing, and luxury of four seasons.

WEAKNESSES OF TOURISM INDUSTRY

Pakistan has not yet manifest its real strength of tourism sector to the tourist world. This is attributed to the major weaknesses related with the law in order situation and lack of facilities and infrastructure. The lack of tourism infrastructure particularly includes under developed roads, poor railway lines, and energy load shedding, inadequate banking services such as insufficient ATM machines, limited acceptance of credit and visa cards at major tourist resorts. With regard to human resources Pakistan has a very low skilled and untrained labor force available to the tourist industry. From government perspective inadequate budgetary funding and lack of focused promotional policies are the major weaknesses to PTM.

OPPORTUNITIES FOR TOURISM INDUSTRY

The true opportunities of Pakistan lie in capitalizing the actual strength of PTM. According to informal survey PTM has not yet used its 50% of tourism potential. Government of Pakistan should take prompt and serious efforts to harness the full potential of her tourism industry through tourist friendly policies. Media in Pakistan should also play the progressive role in the portraying positive image of Pakistan. One of the biggest opportunities to PTM lie in exploring and

making use of so far unutilized tourist sites like Gorakh Hill, one of the Highest Plateaus of Sindh in Dadu District. Because of huge tourist potential government of Pakistan can enter into Joint partnerships and investments with overseas investors. Finally, the policy makers have a great opportunity to focus on community based tourism in order to promote in market and capitalize on the national, regional and local traditional products.

THREATS TO TOURISM INDUSTRY

Pakistan tourism industry has been seriously jeopardized due to various threats from time to time. One of the major threats to Pakistan is started after 9/11 event that has crippled and continue to cripple Pakistan tourism industry through the menace of terrorism, extremism, and insurgency. Among the other threats that PTM is exposed to include Global and national economic slowdown, lack of an effective Human Resource Development policies either by tourist corporations or government, ever aggravating energy crises, political, economic and social instability, and the environment degradation and pollution problems in Pakistan.

CONCLUSION

Tourism industry is an essential driver to the socio-economic growth in the developing countries. The social and cultural values and products can be capitalized upon and channelized into the benefits to masses at local, regional and national level. It is well documented that the availability of qualified and trained human resources determines the base of developed-ness of tourism industry in any given country. The competitiveness of the tourism industry can be well known by the training abilities, work force motivation and education; it shows how far the tourism industry can run (Kusluvan & Kusluvan, 2000). According to latest United Nations Development Programme (UNDP) report tourism sector as one of the fastest growing sector in the world, however, unfortunately people in Pakistan are not aware of it. The main reason for slow growth of Pakistan tourism sector was identified as unavailability of skilled labor, poor law and order situation, and inadequate physical and soft tourist infrastructures. PTM can be sustainably developed if government of Pakistan mainly focuses on improving tourist hard and soft infrastructures, stabilizing law and order situation particularly on tourist resorts, promoting positive

image of PTM through national and international level mass campaigns, developing tourist human resources, promoting national, regional and local tourist products. Tourism as an industry that does not need much investment and can earn more. One can sell product again and again and still products remain one's property. If the tourism sector is properly planned and managed, it is highly likely to play the role of catalyst to socio-economic growth and to increase the living standards of the people in the area.

IMPLICATIONS

This study has identified key problems that hinder the progress of tourism industry in Pakistan which carry great implications to the policy makers that removal of those problems would significantly enhance the growth of tourism sector in Pakistan. Secondly, this study has also highlighted the areas which have potential to attract national and international tourist. Finally, the findings of this study would enhance the existing literature on tourism sector in Pakistan.

RECOMMENDATION

A vibrant tourism sector is vital to the socio-economic development of the relatively poor class in the developing economies like Pakistan. After thoroughly reviewing the present status of tourism industry in Pakistan and on the basis of SWOT analysis conducted in this study, the following recommendations are made.

The very first thing the government should do at priority that strategies be devised to generate and maximize the positive image of Pakistan as an attractive tourist destination. Secondly, the government must put strict measures in place in order to stabilize law and order situation especially at the tourist sites. Thirdly, the government must introduce tourism training programs in all the schools and universities of Pakistan in order to produce skilled tourist guide and qualified labor force who would streamline the weakling/crippling tourism industry of Pakistan. Finally, Government has to be serious in putting tourism industry on the path of sustainable growth. It could be done by various means such as allocating handsome amount of annual budget to tourism sector, marketing tourism, financing new projects, encouraging private investment in infrastructure, and joining with international tourism organizations to arrange overseas tourism fairs and maintain old historical and heritage sites of Pakistan.

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