

**RESEARCH PAPER****Temporal Dynamics of Tourism Growth in Pakistan: Patterns and Trends****¹Muhammad Sajid*, ²Muhammad Hashim, ³Faisal Aziz**

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ABSTRACT

This study analyzes the temporal change of international tourists' inflow in Pakistan, focusing on the period from 2000 to 2020. The data is analyzed quantitatively and the trend line is also applied to show increasing or decreasing trend. The data shows fluctuations in international tourist arrivals, with notable peaks and declines. The highest increase was observed in 2019, followed by a sharp decline in 2020 due to the COVID-19 pandemic. Inbound tourism data from key countries such as the United States, Iran, the United Kingdom, China, and Afghanistan reflects significant declines in 2020, with partial recovery or further decreases in 2021. Outbound tourism from Pakistan also exhibited a similar pattern, with the UAE, Turkey, Saudi Arabia, Thailand, and the USA showing decreases in 2020 and varying degrees of recovery in 2021. Tourism spending and its share in Pakistan's exports fluctuated over the two decades, peaking in 2011 before gradually declining towards 2020. The analysis of registered tour operators reveals a total of 11,087 operators across Pakistan, with Punjab having the highest number. The research underscores the importance of strategic planning to foster sustainable tourism growth in Pakistan.

Keywords: Domestic, Inbound, Outbound, Tourists, Trend**Introduction**

Tourism has long been recognized as a critical driver of economic development, cultural exchange, and social cohesion (Hwang & Lee, 2019; Qasim et al., 2024). In the context of Pakistan, a country endowed with diverse landscapes, rich cultural heritage, and historical significance, tourism holds immense potential (Manzoor et al., 2019). However, the growth and development of tourism in Pakistan have been influenced by various factors over time, including political stability, security concerns, infrastructure development, and marketing strategies (Arshad et al., 2018).

Pakistan boasts a unique geographical landscape that includes majestic mountains, lush valleys, ancient archaeological sites, and vibrant cities (Ahad, 2016). The country's diverse cultural heritage is a blend of multiple civilizations that have flourished in the region for thousands of years (Qasim et al., 2024). From the remnants of the Indus Valley Civilization to the Mughal architectural marvels and the influence of British colonial rule, Pakistan's history is a tapestry of cultural amalgamation (Eshliki&Kaboudi, 2012; Parveen et al., 2023).

In the early years following Pakistan's independence in 1947, the tourism industry was in its nascent stages. The country was primarily focused on nation-building and addressing socio-economic challenges (Fazlur-Rahman et al., 2013). Tourism was not a priority, and infrastructure for tourists was limited. However, the natural beauty of regions

like Swat Valley, Murree, and the Northern Areas (now Gilgit-Baltistan) began to attract local tourists (Anwar & Qasim, 2024).

The 1960s marked the beginning of a more organized approach to tourism. The establishment of the Pakistan Tourism Development Corporation (PTDC) in 1970 was a significant milestone. PTDC played a pivotal role in promoting tourism by developing infrastructure, establishing hotels and motels (Hays & Ozretic-Dosen, 2014), and marketing Pakistan as a tourist destination. The construction of the Karakoram Highway (KKH), connecting Pakistan with China, also opened up new avenues for tourism, particularly in the northern regions (Malik et al., 2010).

The 1980s and 1990s saw a mixed trajectory for tourism in Pakistan. The Soviet-Afghan War and the subsequent influx of Afghan refugees into Pakistan posed security challenges, impacting the tourism industry (Rasul and Manandhar, 2009). However, during this period, Pakistan continued to attract adventure tourists, particularly mountaineers and trekkers, drawn to the mighty peaks of the Karakoram Range, including K2, the second-highest mountain in the world (Qasim et al., 2024).

The 1990s witnessed a resurgence of interest in cultural tourism. Cities like Lahore, with its Mughal architecture and vibrant bazaars, and Karachi, with its cosmopolitan appeal, started gaining popularity. The ancient city of Taxila, a UNESCO World Heritage site, and the Buddhist monasteries of Swat Valley began attracting history enthusiasts and researchers (Hye & Khan, 2013).

The turn of the millennium brought both opportunities and challenges for Pakistan's tourism industry. The global rise of terrorism and the 9/11 attacks had a profound impact on Pakistan's security situation (Arif et al., 2019). The ensuing War on Terror and the instability in neighboring Afghanistan led to a significant decline in international tourist arrivals. The negative perception of Pakistan as a dangerous destination became a major hurdle (Qasim et al., 2023).

Despite these challenges, domestic tourism began to flourish. The middle class in Pakistan started exploring their own country, discovering the beauty of places like Naran, Kaghan, Hunza, and Skardu. Religious tourism also gained momentum, with pilgrims visiting sites of religious significance (Israr et al., 2010). The rise of adventure tourism also contributed to the industry's growth. Activities such as trekking, mountaineering, rock climbing, and white-water rafting gained popularity. The annual Shandur Polo Festival, held on the highest polo ground in the world, became a major tourist attraction, drawing visitors from around the globe (Yasin & Qasim, 2020).

Literature Review

Pakistan's rich cultural heritage has always been a magnet for tourists. The preservation and promotion of historical sites like the Lahore Fort, Shalimar Gardens, and the Rohtas Fort have been instrumental in attracting heritage tourism (Nigar, 2018). The Gandhara region, encompassing the ancient cities of Taxila and Peshawar, holds immense historical significance. The preservation of Buddhist relics, stupas, and monasteries has attracted scholars, researchers, and tourists interested in exploring the ancient Buddhist civilization that once thrived in this region (Qasim & Rahman, 2022).

In recent years, there has been a growing emphasis on ecotourism and sustainable tourism practices. Pakistan's diverse ecosystems, ranging from the mangrove forests of the Indus Delta to the alpine meadows of the Himalayas, offer unique opportunities for nature-based tourism. National parks such as Deosai, Khunjerab, and Hingol have become popular destinations for wildlife enthusiasts and nature lovers (Qasim et al., 2023).

Efforts are being made to promote responsible tourism practices, minimize environmental impact, and involve local communities in tourism development (Almeida et al., 2019). Community-based tourism initiatives in regions like Kalash Valley, Chitral, and the Hunza Valley are empowering local communities, preserving cultural heritage, and ensuring that tourism benefits are shared equitably.

Looking ahead, the future of tourism in Pakistan appears promising, yet it is not without challenges (Font, 2002). According to Bratucu et al., (2017), continued efforts to improve security, infrastructure, and visitor facilities are essential to sustain growth. The development of tourism clusters, focusing on specific regions and themes, can enhance the overall tourist experience and promote regional development.

Collaboration between the government, private sector, and local communities is crucial for sustainable tourism development. Public-private partnerships can drive investment in tourism infrastructure, hospitality, and marketing. Capacity building and training programs for local communities can ensure that tourism benefits are inclusive and sustainable (Qasim & Rahman, 2022).

Moreover, addressing environmental concerns and promoting responsible tourism practices will be vital to preserving Pakistan's natural and cultural heritage. Balancing tourism growth with environmental conservation, waste management, and sustainable resource use will be key to ensuring the long-term viability of the tourism industry (Sato et al., 2018).

The temporal dynamics of tourism growth in Pakistan reflect a journey marked by challenges, resilience, and renewal. From the early days of limited infrastructure to the current era of digital marketing and adventure tourism, Pakistan's tourism industry has evolved significantly. By leveraging its natural beauty, cultural heritage, and the power of technology, Pakistan has the potential to become a leading tourist destination in the region (Qasim et al., 2023).

As the industry continues to grow, it is essential to adopt a holistic and sustainable approach to tourism development. By fostering collaboration, embracing innovation, and prioritizing environmental and cultural preservation (Sand & Gross, 2019), Pakistan can unlock the full potential of its tourism industry, creating economic opportunities, promoting cultural exchange, and showcasing the beauty and diversity of the country to the world.

Materials and Methods

The research methodology serves as a roadmap, guiding the researcher through the sequential tasks necessary to meet the research objectives. This study employs a quantitative data and analytical approach to analyze the influx statistics, along with a descriptive research approach to extract results and discuss the outcomes of statistical data in line with the research needs. Data on the temporal inflow of both domestic and international tourists over a span of twenty years (2000 - 2020) is obtained. To ensure the authenticity and relevance of this data, sources such as the Pakistan Bureau of Statistics, World Bank, Macro trend and other relevant authorities are accessed.

This data is then analyzed statistically using Excel worksheets to determine yearly differences, temporal fluctuations in tourist inflow, and the percentage-wise share in exports and spending in tourism. The research objectives are designed to keep researchers aligned with the specified research aims. This study focuses on analyzing the temporal growth patterns of local and international tourist inflows in the region from 2000 to 2020. Additionally, it explores the trends and potential of tourist influx in the area.

Results and Discussion

The secondary data collected from the concern authorities are analyzed to comprehend the tourism statistics in Pakistan.

Table 1
Total Arrival of foreigners in Pakistan 2000 - 2020

Year	International Tourists in Pakistan	Year based Difference of inflow
2000	5,57,000	-
2001	5,00,000	-57,000
2002	4,98,000	-2000
2003	5,01,000	+3000
2004	6,48,000	+147,000
2005	7,98,000	+150,000
2006	8,98,000	+100,000
2007	8,40,000	-58,000
2008	8,23,000	-17,000
2009	8,55,000	+32,000
2010	9,07,000	+52,000
2011	11,61,000	+254,000
2012	9,66,000	-195,000
2013	5,65,212	-400,788
2014	5,30,000	-35,212
2015	5,63,400	+33,400
2016	9,65,498	+402,098
2017	17,50,000	+784,502
2018	19,00,035	+150,035
2019	35,00,000	+1,599,965
2020	1,63,000	-3,337,000

Source: (World Bank, 2020 for International tourists' inflow in Pakistan)

Table 1 shows the total arrival of international tourists in Pakistan from 2000 to 2020, along with the yearly differences in tourist inflow. In 2000, Pakistan welcomed 557,000 international tourists. The number slightly decreased in 2001 to 500,000, showing a decline of 57,000 tourists. The downward trend continued in 2002 with 498,000 tourists, a small drop of 2,000 from the previous year. However, in 2003, the numbers picked up slightly to 501,000, a small increase of 3,000. The years 2004 and 2005 saw significant growth, with tourist numbers rising to 648,000 and 798,000 respectively, marking increases of 147,000 and 150,000. This positive trend continued into 2006 with 898,000 tourists, an increase of 100,000. However, there was a decline in 2007, with numbers dropping to 840,000, a decrease of 58,000. The downward trend continued in 2008, with a small drop to 823,000 tourists.

In 2009, there was a modest recovery with 855,000 tourists, an increase of 32,000. This positive momentum continued in 2010, with 907,000 tourists, marking a rise of 52,000. The most significant increase occurred in 2011 when tourist numbers jumped to 1,161,000, a substantial rise of 254,000. However, 2012 saw a sharp decline to 966,000 tourists, a decrease of 195,000. The drop continued in 2013 with a significant reduction to 565,212 tourists, a drop of 400,788. The downward trend persisted in 2014, with numbers falling slightly to 530,000.

In 2015, there was a small recovery to 563,400 tourists, an increase of 33,400. The numbers surged dramatically in 2016 to 965,498, an increase of 402,098. This upward trend continued in 2017, with tourist arrivals nearly doubling to 1,750,000, an increase of

784,502. The growth persisted in 2018, reaching 1,900,035, an increase of 150,035. Year 2019 saw an unprecedented rise in tourist numbers to 3,500,000, a significant increase of 1,599,965. However, 2020 witnessed a dramatic decline to 163,000 tourists, a reduction of 3,337,000, likely due to the global COVID-19 pandemic. Overall, the data shows a fluctuating pattern in the arrival of international tourists in Pakistan, with periods of significant growth followed by sharp declines. The most notable growth occurred in the latter half of the period, particularly in 2017 and 2019, before the pandemic caused a major drop in 2020.

Table 2
Inbound tourists by Country in Pakistan

S. No.	Country	Year, 2019	Year, 2020	Year, 2021
01	United States	211,338	106,847	108,744
02	Iran	62,686	37,693	44,270
03	UK	484,744	244,612	149,986
04	China	108,608	33,820	25,655
05	Afghanistan	2,138,784	748,493	719,387

Source: (Pakistan Bureau of Statistics, 2024)

Table 2 presents data on the number of inbound tourists from five different countries to Pakistan for the years 2019, 2020, and 2021. In 2019, the United States had 211,338 tourists visiting Pakistan. This number dropped significantly in 2020 to 106,847, likely due to the COVID-19 pandemic, and saw a slight increase in 2021 to 108,744. Tourists from Iran numbered 62,686 in 2019. This figure fell to 37,693 in 2020 but rose again in 2021 to 44,270. The United Kingdom had a substantial number of tourists in 2019, with 484,744 visiting Pakistan. This number decreased sharply in 2020 to 244,612 and further declined to 149,986 in 2021.

China sent 108,608 tourists to Pakistan in 2019. The number dropped to 33,820 in 2020 and continued to fall in 2021 to 25,655. Afghanistan had the highest number of tourists visiting Pakistan among the listed countries, with 2,138,784 in 2019. The number significantly decreased to 748,493 in 2020 and slightly decreased further to 719,387 in 2021. Overall, the data indicates a sharp decline in inbound tourists from all listed countries between 2019 and 2020, attributed to the COVID-19 pandemic, with only slight recoveries or continued declines in 2021.

Table 3
Outbound tourists by Country from Pakistan

S. No.	Country	Year, 2019	Year, 2020	Year, 2021
01	UAE	107,201	67,407	95,537
02	Turkey	13,150	12,800	21,579
03	Saudi Arabia	12,552	4,456	2,436
04	Thailand	13,740	2,095	264
05	USA	9,043	3,083	5,297

Source: (Pakistan Bureau of Statistics, 2024)

Table 3 provides information on the number of outbound tourists from Pakistan to five different countries for the years 2019, 2020, and 2021. In 2019, 107,201 Pakistanis traveled to the UAE. This number decreased to 67,407 in 2020, likely due to the COVID-19 pandemic, but saw an increase to 95,537 in 2021. For Turkey, 13,150 Pakistanis visited in 2019. The number slightly declined to 12,800 in 2020 but increased significantly to 21,579 in 2021. Saudi Arabia saw 12,552 Pakistani tourists in 2019. This number dropped sharply to 4,456 in 2020 and further decreased to 2,436 in 2021. Thailand had 13,740 Pakistani tourists in 2019. The number dropped dramatically to 2,095 in 2020 and even further to

264 in 2021. The USA received 9,043 Pakistani tourists in 2019. This figure fell to 3,083 in 2020 but rose to 5,297 in 2021. The data shows a general decline in outbound tourism from Pakistan in 2020, attributable to the pandemic, with varying degrees of recovery or continued decrease in 2021 depending on the destination country.

Table 4
Tourism spending and share in exports for Pakistan 2001 - 2020

Years	Spending in USD	Exports %
2020	765,000,000.00	2.80
2019	992,000,000.00	3.23
2018	845,000,000.00	2.75
2017	865,000,000.00	2.93
2016	790,000,000.00	2.94
2015	915,000,000.00	3.20
2014	971,000,000.00	3.17
2013	938,000,000.00	3.12
2012	1,014,000,000.00	3.23
2011	1,127,000,000.00	3.59
2010	998,000,000.00	3.56
2009	950,000,000.00	4.26
2008	986,000,000.00	3.87
2007	912,000,000.00	4.16
2006	919,000,000.00	4.47
2005	828,000,000.00	4.33
2004	765,000,000.00	4.77
2003	620,000,000.00	4.20
2002	562,000,000.00	4.62
2001	533,000,000.00	5.09

Source: (Macrotrend.net, 2024)

Table 4 illustrates tourism spending in USD and its share in exports for Pakistan from 2001 to 2020. In 2020, tourism spending was \$765 million, contributing 2.80% to exports. The previous year, 2019, saw higher spending at \$992 million, with a 3.23% share in exports. In 2018, spending amounted to \$845 million, making up 2.75% of exports. In 2017, \$865 million was spent on tourism, representing 2.93% of exports. The year 2016 saw spending of \$790 million, contributing 2.94% to exports. In 2015, tourism spending was \$915 million, accounting for 3.20% of exports.

For 2014, the spending was \$971 million, with a 3.17% share in exports, while 2013 recorded \$938 million in spending, contributing 3.12% to exports. In 2012, tourism spending reached \$1.014 billion, making up 3.23% of exports. In 2011, the highest recorded spending was \$1.127 billion, contributing 3.59% to exports. The year 2010 saw \$998 million in spending, with a 3.56% share. In 2009, spending was \$950 million, representing 4.26% of exports. In 2008, tourism spending was \$986 million, contributing 3.87% to exports, while 2007 saw \$912 million in spending, with a 4.16% share. For 2006, spending amounted to \$919 million, making up 4.47% of exports. In 2005, tourism spending was \$828 million, contributing 4.33% to exports. The year 2004 recorded \$765 million in spending, representing 4.77% of exports. In 2003, spending was \$620 million, with a 4.20% share. In 2002, tourism spending reached \$562 million, contributing 4.62% to exports. Finally, in 2001, the earliest year recorded, spending was \$533 million, making up the highest share of 5.09% in exports. The data shows fluctuations in tourism spending and its share in exports over the two decades, with a notable peak in 2011 and a gradual decline towards 2020.

Table 5
Registered Tour Operators in Pakistan

S. No.	Area	Registered Tour Operators
01	Islamabad	820
02	Punjab	5810
03	Sindh	2213
04	KhberPakhtunkhwa	2010
05	Balochistan	234
	Total	11087

Source: (Pakistan Bureau of Statistics, 2024)

Table 5 provides data on the number of registered tour operators in different areas of Pakistan. In Islamabad, there are 820 registered tour operators. Punjab has the highest number with 5,810 operators. Sindh follows with 2,213 registered tour operators. Khyber Pakhtunkhwa has 2,010 operators, while Balochistan has the fewest with 234 registered tour operators. Overall, the total number of registered tour operators across these areas is 11,087.

Table 6
Domestic Tourist Inflow in GilgitBaltistan (2012 - 2020)

S. No.	Year	Domestic Tourist Inflow	International Tourist Inflow
01	2012	28,893	4324
02	2013	51,914	4501
03	2014	50,304	3442
04	2015	200,651	4084
05	2016	439,685	4773
06	2017	781,224	6212
07	2018	1,391,628	9027
08	2019	1,023,023	10,828
09	2020	634,344	1098

Source: (Pakistan Bureau of Statistics, 2024)

Table 6 details the inflow of domestic and international tourists in Gilgit-Baltistan from 2012 to 2020. In 2012, the region saw 28,893 domestic tourists and 4,324 international tourists. The following year, 2013, domestic tourist numbers almost doubled to 51,914, with a slight increase in international tourists to 4,501. In 2014, domestic tourist numbers slightly decreased to 50,304, while international tourist inflow fell to 3,442. However, in 2015, there was a significant increase in domestic tourists, reaching 200,651, although international tourists slightly decreased to 4,084.

The year 2016 saw a dramatic rise in domestic tourists to 439,685, and international tourists increased to 4,773. The upward trend continued in 2017, with domestic tourists reaching 781,224 and international tourists increasing to 6,212. In 2018, domestic tourism surged to 1,391,628, and international tourists also increased to 9,027. The numbers slightly declined in 2019, with 1,023,023 domestic tourists and 10,828 international tourists. In 2020, likely due to the impact of the COVID-19 pandemic, domestic tourist inflow decreased to 634,344, and international tourist numbers dropped significantly to 1,098. Overall, the data indicates a general upward trend in both domestic and international tourist inflow in Gilgit-Baltistan from 2012 to 2019, followed by a significant decline in 2020.

Table 7
Domestic Tourist Influx in Azad Jammu Kashmir (2012- 2020)

S. No.	Year	Domestic Tourist Inflow (M)
01	2012	0.750

02	2013	1.000
03	2014	1.200
04	2015	1.350
05	2016	1.500
06	2017	1.200
07	2018	1.450
08	2019	0.650
09	2020	0.357

Source: (Pakistan Bureau of Statistics, 2024)

Table 7 shows the domestic tourist influx in Azad Jammu and Kashmir (AJK) from 2012 to 2020, measured in millions. In 2012, AJK received 0.750 million domestic tourists. This number increased to 1.000 million in 2013. The upward trend continued in 2014, with 1.200 million domestic tourists visiting the region. In 2015, the number rose to 1.350 million, and in 2016, it further increased to 1.500 million. However, there was a noticeable decline in 2017, with domestic tourist influx dropping to 1.200 million. The year 2018 saw a slight recovery, with 1.450 million domestic tourists visiting AJK. In 2019, there was a significant decline to 0.650 million domestic tourists. The trend continued in 2020, with the number dropping further to 0.357 million. The data shows a general increase in domestic tourist influx (Qasim& Rahman, 2022) in AJK from 2012 to 2016, followed by fluctuations and a notable decline from 2019 to 2020.

Conclusion

The analysis of tourism growth in Pakistan from 2000 to 2020 reveals a complex interplay of factors influencing both domestic and international tourism trends. The data indicates periods of substantial growth, particularly in the years leading up to 2019, followed by significant declines in 2020 due to the COVID-19 pandemic. The fluctuating patterns in tourism spending and its contribution to exports further underscore the sector's volatility. Despite challenges, regions like Gilgit-Baltistan and Azad Jammu and Kashmir experienced notable increases in domestic tourist inflow until 2019, reflecting their growing appeal as tourist destinations. The study highlights the critical need for robust strategies to enhance tourism infrastructure, ensure safety, and promote sustainable practices. Addressing these areas will be essential for Pakistan to harness its tourism potential and drive economic growth in the post-pandemic era.

Recommendations

1. Improve and expand transportation networks, including roads, railways, and airports, to ensure easy access to major tourist destinations. Enhancing connectivity between cities, rural areas, and natural attractions will encourage domestic and international tourism.
2. Launch targeted international marketing campaigns to promote Pakistan's diverse tourist attractions, such as the majestic mountain ranges, historical sites, cultural festivals, and scenic landscapes.
3. Invest in building a range of accommodation options, from budget-friendly hostels to luxury resorts, ensuring there are options for all types of travelers.

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