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Pakistan Tourism Barometer

(Edition - 2022)



Pakistan Tourism
Development Corporation (PTDC)

Welcome to Pakistan

The Land of Adventure and Nature

From the mighty stretches of the Karakorum's in the North to the vast alluvial delta of the Indus River in the South, Pakistan remains a land of high adventure and nature. Trekking, mountaineering, white water rafting, wild boar hunting, mountain and desert jeep safaris, camel and yak safaris, trout fishing and bird watching, are a few activities, which entice the adventure and nature lovers to Pakistan.

PTDC

Pakistan Tourism Development Corporation

Pakistan Tourism Development Corporation (PTDC) is a public limited company registered under the Companies Act in April 1970. It was created to be the government's arm and thrust for tourism development in Pakistan with objects to develop tourism infrastructure all over Pakistan, to promote and market Pakistan as tourism destination in foreign as well as domestic markets, to act as a catalyst to encourage to private sector to play a more active role in tourism development and to undertake tour operations and provide ground handling facilities. In its present role, PTDC also serves as the secretariat and implementation body of the National Tourism Coordination Board (NTCB) and as a National Tourism Organization (NTO) to coordinate with international, regional, national, provincial and private sector stakeholders to develop strategies and plan to promote Pakistan as tourist destination at global level.



Pakistan Tourism Development Corporation
www.tourism.gov.pk

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Global Tourism Economy

World Travel & Tourism Council (WTTC) represents the Travel & Tourism sector globally.

For over 30 years, WTTC has conducted research on the economic impact of Travel & Tourism in 185 countries and issues such as overcrowding, taxation, policy making, and many others to raise awareness of the importance of the Travel & Tourism sector as one of the world's largest economic sectors.

Global Data				
Total GDP contribution:			Total Travel & Tourism jobs:	
2019	10.3% USD 9,630 BN	Travel & Tourism GDP change:	333 MN = 1 in 10 jobs	Change in Jobs ² :
2020	5.3% USD 4,775 BN	-50.4% =USD -4,855 BN (Economy GDP = -3.3%)	271 MN = 1 in 12 jobs	-62.0MN = -18.6%
2021	6.1% USD 5,812 BN	+21.7% =USD 1,038 BN (Economy GDP = 5.8%)	289 MN = 1 in 11 jobs	+18.2MN = + 6.7%

Source: WTTC Report 2022



Pakistan Tourism Growth and Economy

In the recent years Federal and Provincial Governments have made good progress in improving the performance of tourism sector in Pakistan by taking various steps to overall improve the condition of tourism services infrastructure, business environment, safety and security, health and hygiene, ICT readiness, and socio-economic resilience and conditions. Although we have made good progress but still, we need to do a lot to further enhance the performance of tourism sector in Pakistan which has huge potential to play a key role in the overall socio-economic development of Pakistan.

Pakistan Key Data		
2019	2020	2021
Total contribution of Travel & Tourism to GDP:		
5.8% of Total Economy PKR 3,051.4BN (USD 18,727.7MN)	3.9% of Total Economy PKR 2,020.4BN (USD 12,400.0MN) Change: -33.8% Economy change: -1.3%	3.7% of Total Economy PKR 2,080.6BN (USD 12,769.5MN) Change: +3.0% Economy change: +6.0%
Total contribution of Travel & Tourism to Employment:		
3.89MN 6.1% of total jobs	3.36MN 5.2% of total jobs Change: -13.7%	3.34MN 5.1% of total jobs Change: -0.5%
Visitor Spend:		
International:		
PKR 178.5BN 3.6% of total exports (USD 1,095.2MN)	PKR 134.8BN 2.8% of total exports (USD 827.5MN) Change: -24.4%	PKR 138.8BN 2.9% of total exports (USD 852.1MN) Change: +3.0%
Domestic:		
PKR 2,134.5BN (USD 13,100.2MN)	PKR 1,292.5BN (USD 7,932.4MN) Change: -39.4%	PKR 1,396.2BN (USD 8,568.8MN) Change: +8.0%

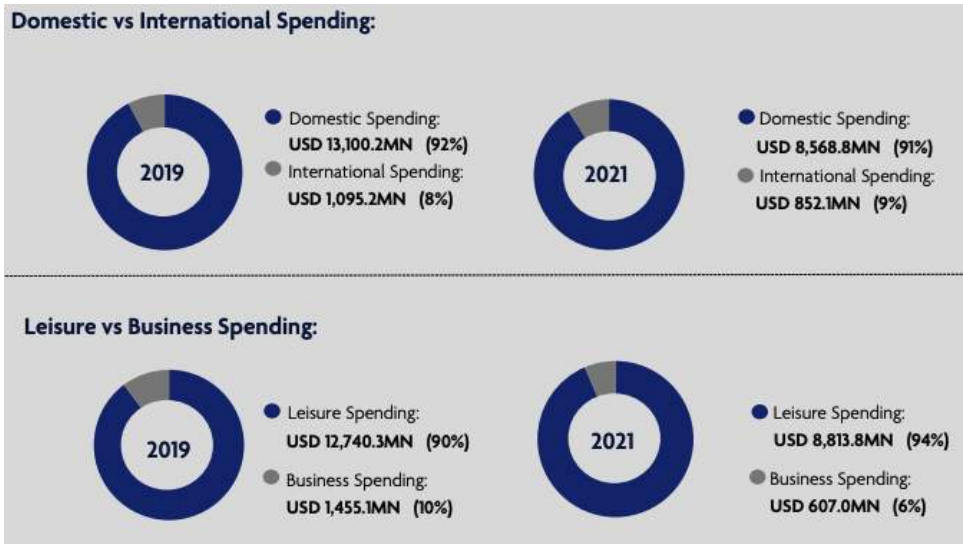
Source: WTTC Report 2022



Pakistan Travel & Tourism Sector Characteristics

The main tourism market for Pakistan is the domestic one, which corresponds to 91% of Visitor Spending, while international spending corresponds to only 9% of it. Also, the main Visitor Spending is linked to leisure activities (90%).

Pakistan Travel & Tourism sector characteristics (2022)



Source: WTTC, (2022) Pakistan Travel & Tourism

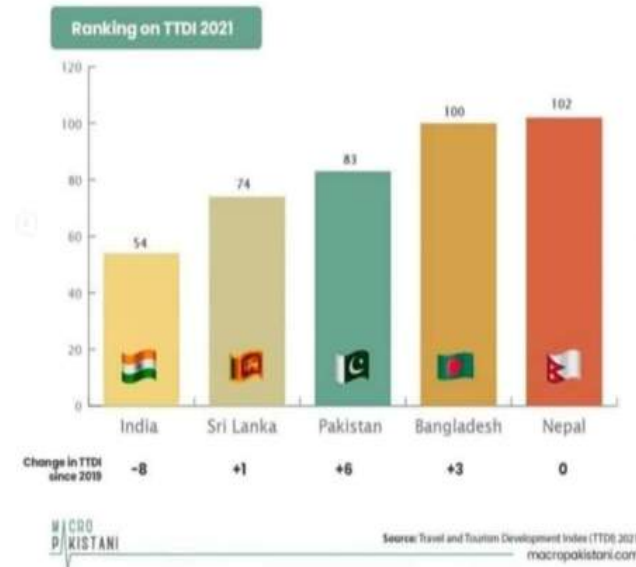


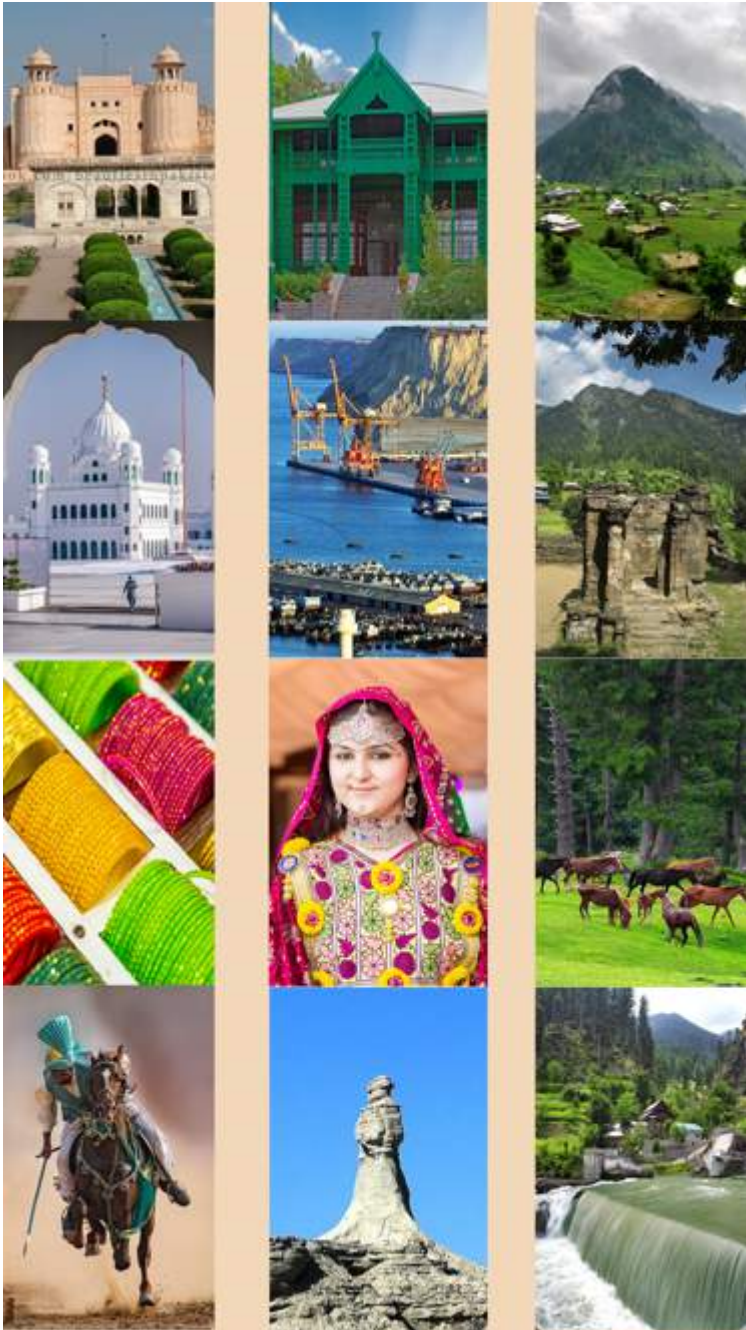
Pakistan Position on Tourism Competitive Index

Pakistan Makes a Significant Improvement on International Travel and Tourism Development Index

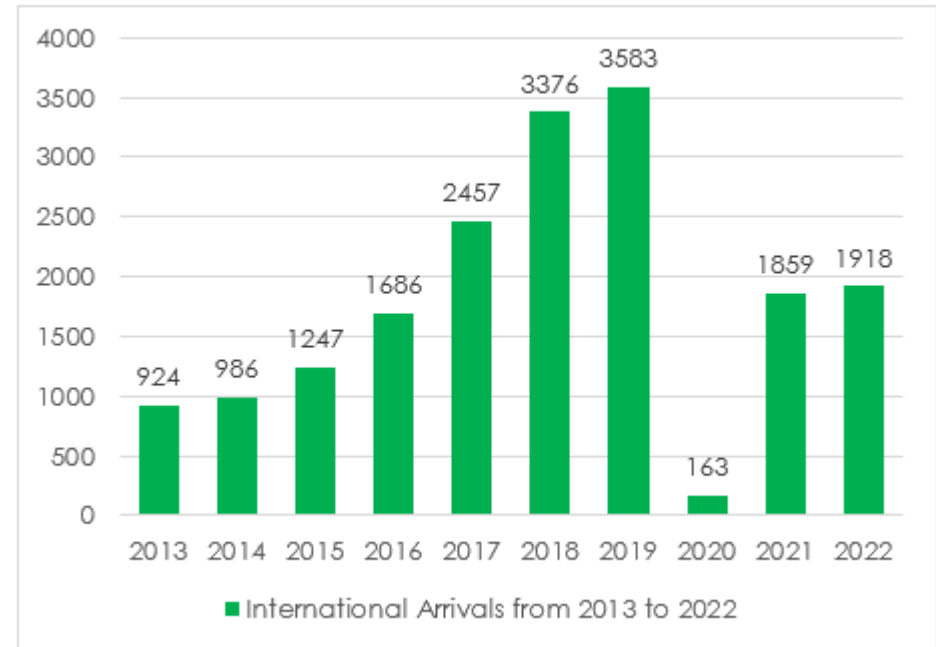
Pakistan has made a big jump on International Travel and Tourism Development Index by moving up six places as per the latest report released by the World Economic Forum (WEF). As per the latest edition of the international travel and tourism competitive index titled "Rebuilding for a Sustainable and Resilient Future," Pakistan has been ranked 83rd, which is up from 89th place in the index's previous edition of 2019. Six points increase in the ranking of Pakistan on global travel and tourism index is quite a significant progress and now Pakistan is among the countries in the Asia Pacific Region that have improved its ranking the most since 2019.

Pakistan is the **3rd best (next to India and Sri Lanka)** among South Asian economies with the biggest improvement in TTDI score since 2019





Inbound Travel & Tourism

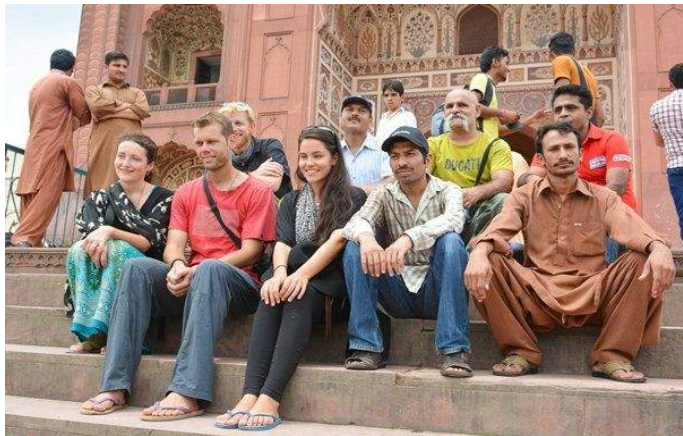


No. of International Arrivals (000)

During the last 10 years, a continues growth has been recorded in the international arrivals in Pakistan. In 2013, Pakistan's international arrival was at 924,000 and in 2019 it crossed the figure of 3.58 million.

In 2019, Pakistan's tourism potential was featured on CNN and in Forbes Magazine while the award-winning travel magazine Conde Nast Traveler declared Pakistan as one of the "Best Holiday Destinations" and British Backpacker's Society described Pakistan as one of the 'friendliest countries on earth with mountain scenery that is beyond anyone's wildest imagination'.

In 2020, due to the global outbreak of coronavirus, the international arrivals went down to the figure of 163,000 only. The tourism economy has been severely affected by the COVID-19 epidemic and caused unprecedented damage to the tourism sector. PTDC immediately developed a tourism recovery strategy in consultation with all the stakeholders and started efforts to restore tourism in Pakistan focusing on promotion of safe domestic tourism gradually opened the country for inbound tourism. As a result, now we have noticed a continues improvement during 2021 and 2022. The international arrivals reached at the figure of 1.91 million in 2022.



Inbound Travel & Tourism

Inbound Country Wise Arrivals Year 2019-21

S#	Nationality	2019	2020	2021
1.	United States	211,338	106,847	108,744
2.	Islamic Republic of Iran	62,686	37,693	44,270
3.	United Kingdom	484,744	244,612	149,986
4.	China, mainland	108,608	33,820	25,655
5.	Afghanistan	2,138,784	748,493	719,387
6.	Malaysia	8,679	2,232	495
7.	Canada	98,159	48,232	34,315
8.	Germany	33,087	15,096	14,366
9.	Australia	33,504	9,949	2,857
10.	Thailand	4,880	1,192	1,609
11.	Korea, Republic of	7,770	2,998	2,257
12.	Spain	14,365	9,016	8,732
13.	Turkey	10,680	7,005	5,899
14.	France	17,808	8,489	8,424
15.	Italy	20,565	10,116	10,955
16.	Sri Lanka	5,471	2,844	2,069
17.	Saudi Arabia	8,840	2,847	2,449
18.	South Africa	8,774	3,854	2,468
19.	Singapore	3,584	730	286
20.	Russian Federation	4,242	2,973	2,892
21.	Netherlands	13,231	6,416	5,964
22.	Mauritius	1,023	377	86
23.	India	75,315	45,176	13,243
24.	Philippines	29,176	27,382	20,749
25.	Poland	2,501	1,371	1,323

Inbound Country Wise Arrivals Year 2019-21

S#	Nationality	2019	2020	2021
26.	United Arab Emirates	3,650	2,121	1,043
27.	Oman	8,723	3,362	2,281
28.	Japan	10,047	2,291	1,298
29.	Norway	21,188	8,268	7,005
30.	Indonesia	4,669	2,396	1,967
31.	Bangladesh	3,796	2,188	1,387
32.	Sweden	7,374	3,380	3,539
33.	Switzerland	3,383	1,427	1,363
34.	Kenya	1,705	667	580
35.	Ireland, Republic of	9,849	4,425	3,337
36.	Austria	2,962	1,238	1,321
37.	Ukraine	6,003	6,992	6,216
38.	Denmark	9,291	3,661	4,028
39.	Egypt	2,910	1,283	1,222
40.	Bahrain	11,780	5,303	6,182
41.	Belgium	8,867	4,094	5,134
42.	Jordan	2,319	715	535
43.	Nepal	1,585	661	480
44.	Viet Nam	1,113	781	550
45.	Hungary	686	267	258
46.	(Republic of China) Taiwan	1,081	358	111
47.	Refugee (1951 Convention)	1,719	964	332
48.	Czech Republic	678	229	247
49.	New Zealand	3,116	1,039	363
50.	Qatar	1,347	469	381



Inbound Country Wise Arrivals Year 2019-21

S#	Nationality	2019	2020	2021
51.	Mozambique	1,438	669	621
52.	Portugal	3,194	1,873	1,479
53.	Brazil	666	320	177
54.	Romania	1,900	1,607	1,153
55.	Morocco	900	425	302
56.	United Republic of Tanzania	980	552	453
57.	Mexico	321	140	134
58.	Yemen	752	268	271
59.	Greece	1,612	1,158	966
60.	Lebanon	799	309	188
61.	Myanmar	3,906	3,754	2,851
62.	Finland	1,190	582	571
63.	Slovakia	308	172	93
64.	Sudan	748	246	207
65.	Nigeria	1,179	572	801
66.	Syrian Arab Republic	606	681	802
67.	Lithuania	420	228	122
68.	Macao	3,696	1,411	1,633
69.	Refugee (Other)	185	118	25
70.	Iraq	778	371	336
71.	Azerbaijan	522	233	249
72.	Kazakhstan	566	285	301
73.	Cambodia	181	29	5
74.	Bulgaria	793	515	280
75.	Ethiopia	474	281	234

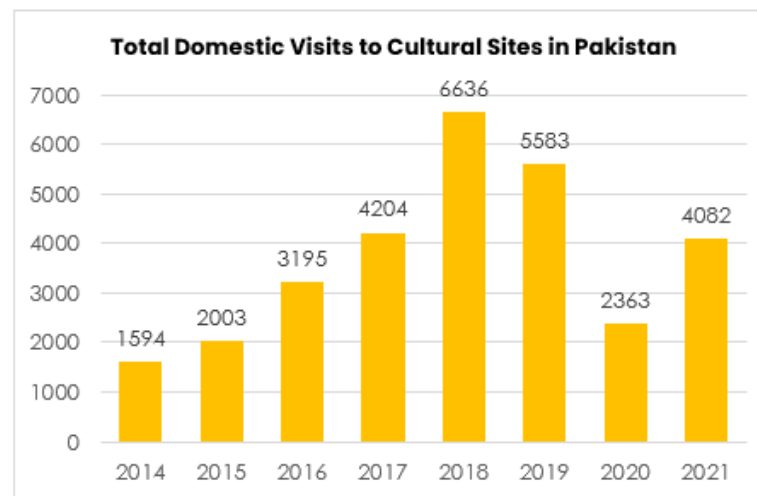
Source: IBMS (Ministry of Interior)



Outbound Travel Countries for Pakistani Nationals Year 2018-21

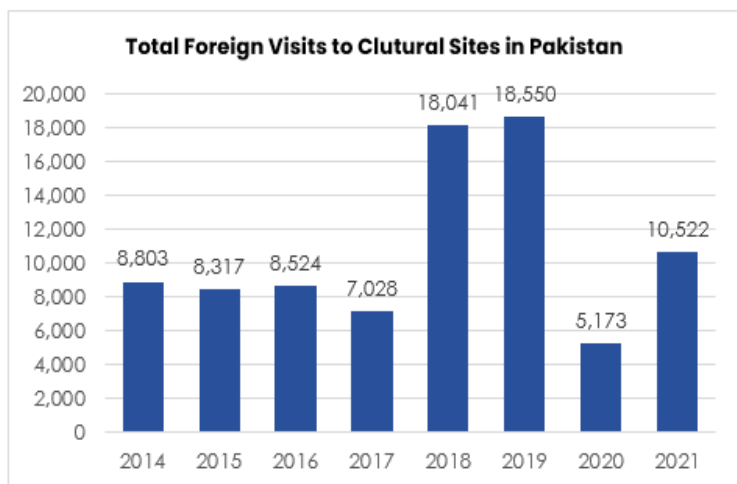
S#	Nationality	2018	2019	2020	2021
1.	United Arab Emirates	59,043	107,201	67,407	95,537
2.	Turkey	6,171	13,150	12,800	21,579
3.	Saudi Arabia	22,484	12,552	4,456	2,436
4.	Thailand	6,007	13,740	2,095	264
5.	United States	4,317	9,043	3,083	5,297
6.	Malaysia	7,394	12,194	2,188	121
7.	Iraq	5,397	5,978	2,111	5,607
8.	United Kingdom	4,333	7,390	2,408	1,801
9.	Iran	3,536	7,078	1,842	1,877
10.	Afghanistan	1,487	5,830	989	560
11.	Azerbaijan	2,476	5,318	1371	29
12.	Oman	2,570	3,890	1,237	1,732
13.	China, mainland	4,618	4,443	196	40
14.	Germany	1,594	3,521	753	442
15.	Italy	1,840	3,326	938	440
16.	Australia	1,666	2,611	860	304
17.	Sri Lanka	1,334	2,364	616	1,447
18.	Canada	1,253	2,258	733	649
19.	Qatar	1,335	2,067	912	766
20.	Kenya	191	390	351	4,646

Source: IBMS (Ministry of Interior)



Source: Gallup Pakistan / Department of Archaeology & Museum, Government of Pakistan

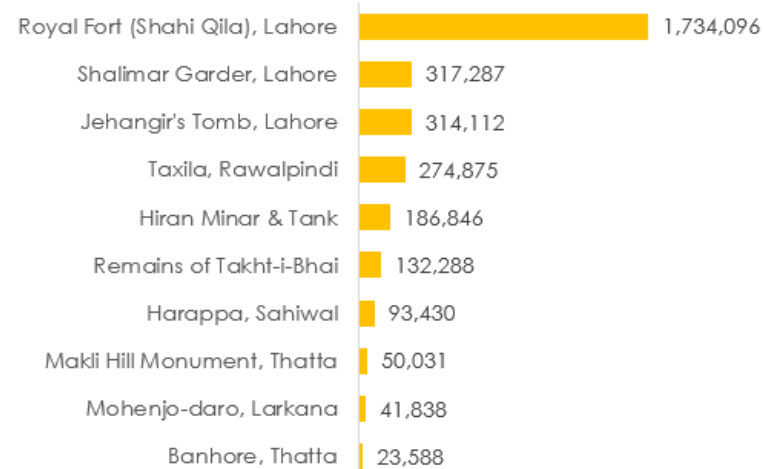




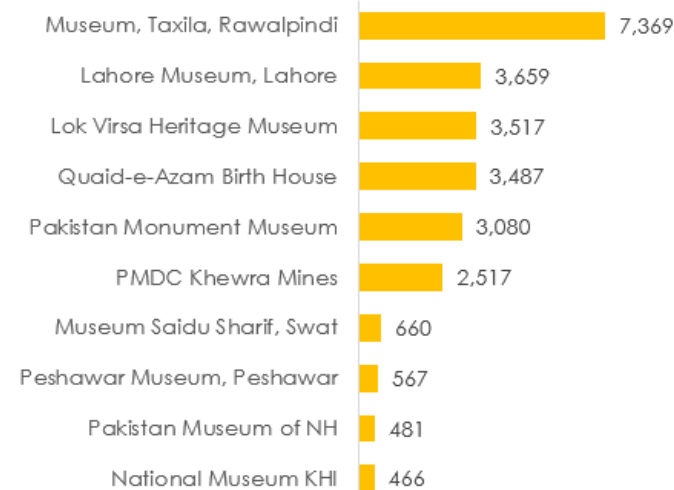
Source: Gallup Pakistan / Department of Archaeology & Museum, Government of Pakistan



Top 10 Museum Sites Among Pakistani Tourists



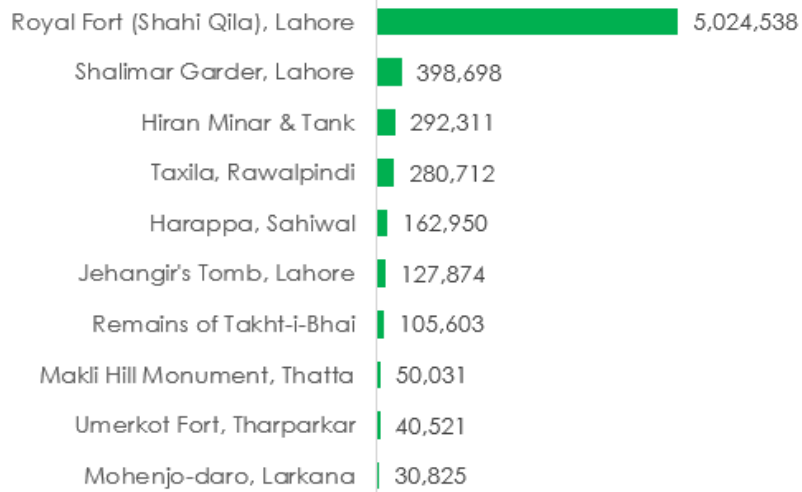
Top 10 Museum Sites Among Foreign Tourists



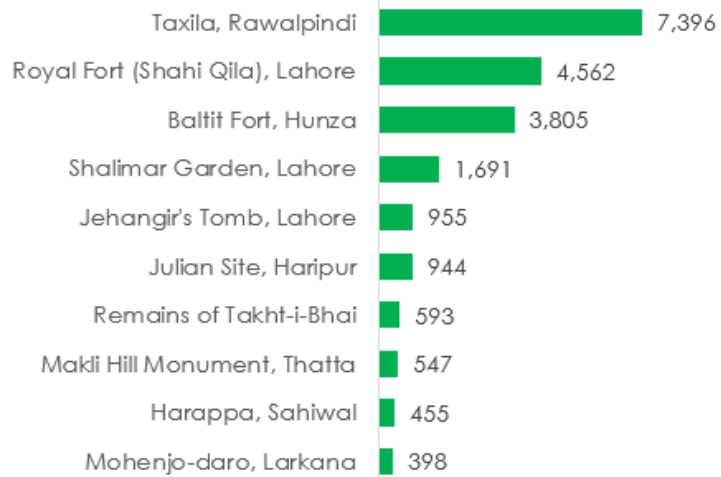
Source: Gallup Pakistan / Department of Archaeology & Museum, Government of Pakistan



Top 10 Cultural Sites Among Pakistani Tourists



Top 10 Cultural Sites Among Foreign Tourists

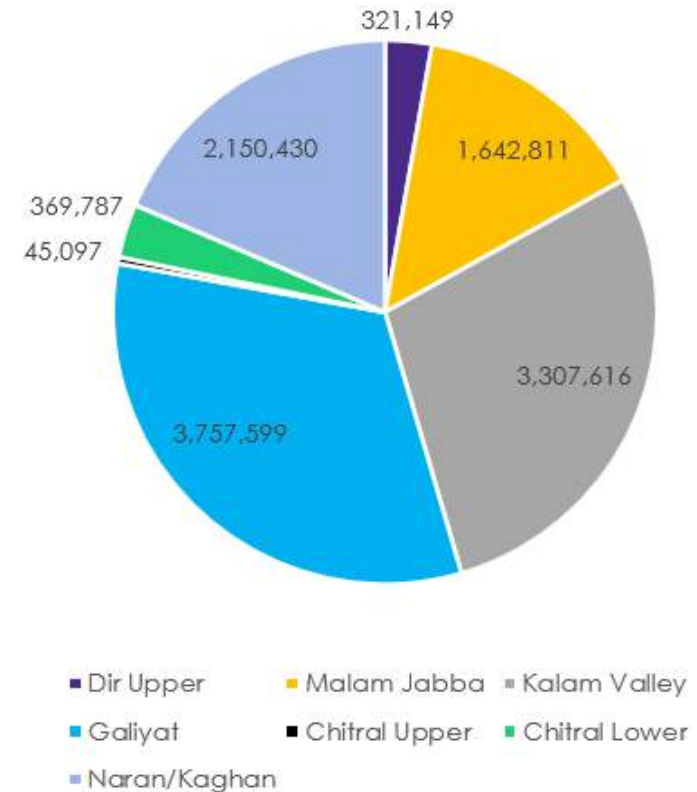


Source: Gallup Pakistan / Department of Archaeology & Museum, Government of Pakistan



Tourism in Khyber Pakhtunkhwa

Yearly Domestic Tourist Influx in Khyber Pakhtunkhwa
January-December 2022

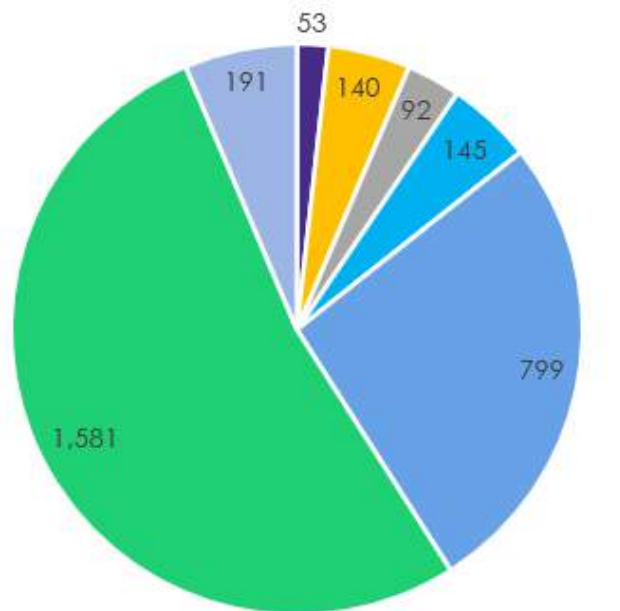


Source: KP Tourism Department



Tourism in Khyber Pakhtunkhwa

Yearly Foreign Tourist Influx in Khyber Pakhtunkhwa
January-December 2022



■ Dir Upper ■ Malam Jabba ■ Kalam Valley
 ■ Galiyat ■ Chitral Upper ■ Chitral Lower
 ■ Naran/Kaghan

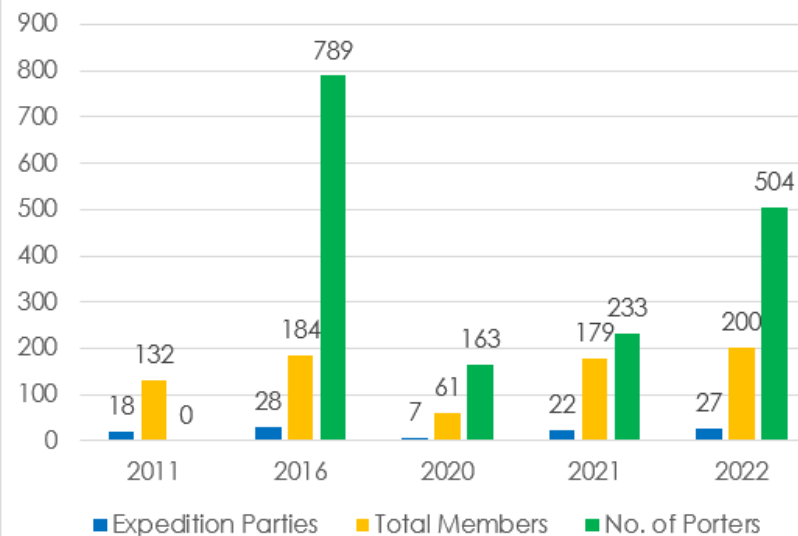
Source: KP Tourism Department



Consolidated Data of Mountaineering Expeditions in Gilgit Baltistan (GB)

Year	Expedition Parties	Total Members	No of Porters
2011	18	132	0
2016	28	184	789
2020	7	61	163
2021	22	179	233
2022	27	200	504

Expedition Parties in Gilgit - Baltistan



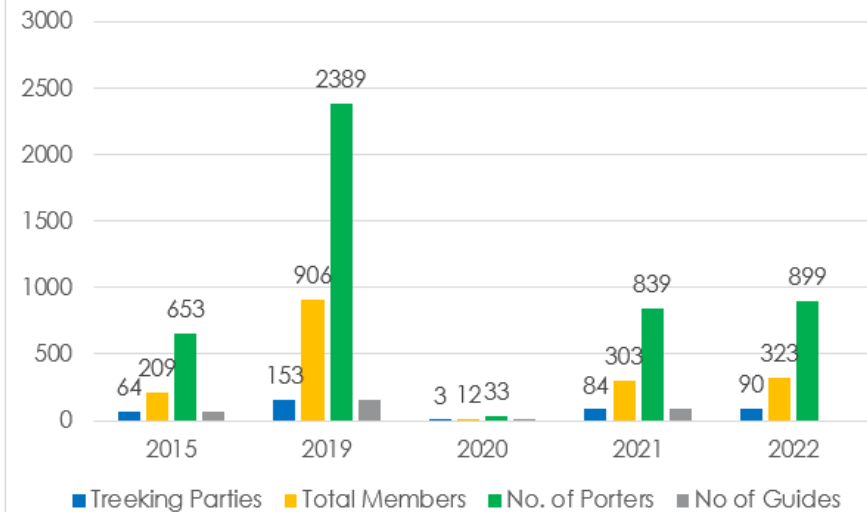
Source: GB Tourism Department



Consolidated Data of Trekking Parties in Gilgit Baltistan (GB)

Year	Trekking Parties	Total Members	No of Porters	No of Guides
2015	64	209	653	64
2019	153	906	2389	153
2020	3	12	33	5
2021	84	303	839	84
2022	90	323	899	0

Trekking Parties in Gilgit Baltistan



Source: GB Tourism Department



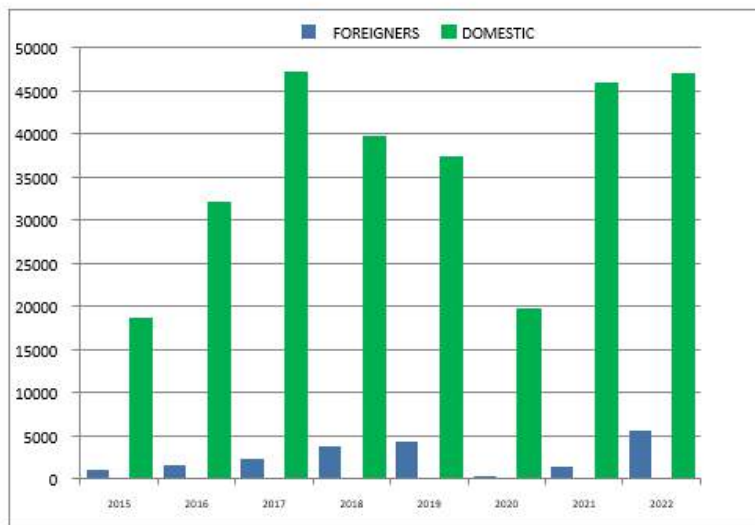
Domestic and Foreign Tourist Arrivals in Gilgit Baltistan

Year	Domestic Tourist Arrivals	Foreign Tourist Arrivals
2007	23,770	10,338
2008	54,040	8,504
2009	54,602	7,739
2010	45,300	7,728
2011	61,233	5,242
2012	28,893	4,324
2013	51,914	4,501
2014	50,304	3,442
2015	200,651	4,084
2016	439,685	4,773
2017	781,224	6,212
2018	1,391,628	9,027
2019	1,023,023	10,828
2020	634,344	1,098
2021	819,402	3,237
2022	912,587	12,140

Source: Gilgit Baltistan Tourism Department



Domestic and Foreign Visits to Balti Fort Hunza 2015–2022



Source: Baltit Heritage Trust



Domestic Tourist Arrivals in Azad Jammu & Kashmir (AJK)

Year	Tourist Arrivals (M)
2012	0.750
2013	1.000
2014	1.200
2015	1.350
2016	1.500
2017	1.200
2018	1.450
2019	0.650
2020	0.357
2021	0.425
2022	0.630

Source: AJK Tourism Department



No. of Registered Tour Operators / Travel Agents in Pakistan

Province / Territory	Tour Operators
Islamabad	820
Punjab	5,810
Sindh	2,213
Khyber Pakhtunkhwa	2,010
Balochistan	234
Total	11,087

Registered Tour Operators and Travel Agents



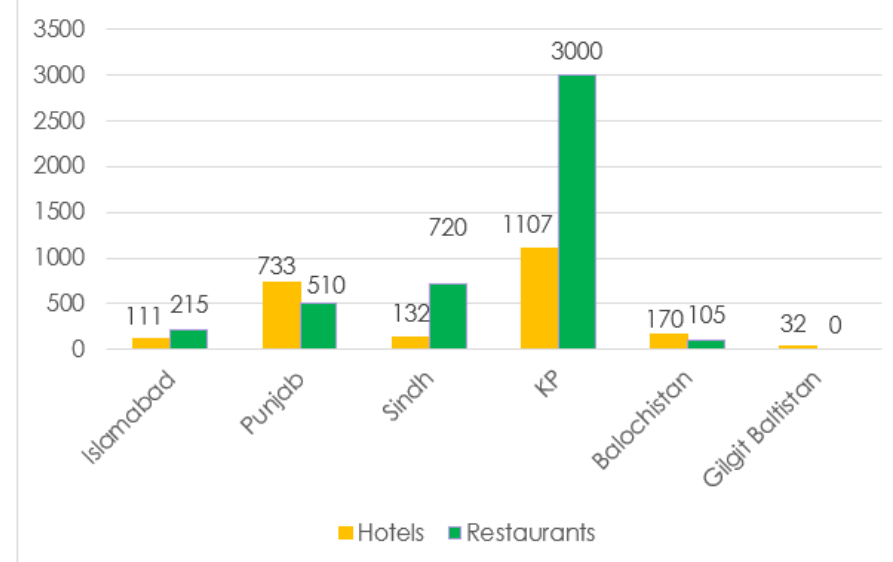
Source: Department of Tourist Services



No. of Registered Hotels and Restaurants in Pakistan

Province/Region	Hotels					Total	Restaurants
	5*	4*	3*	2*	1*		
Islamabad	02	02	10	97		111	215
Punjab	06	13	56	58	600	733	510
Sindh	06	02	17	07	208	240	720
Khyber Pakhtunkhwa	01	02	23	161	920	1107	3000
Balochistan	02	01	01	05	161	170	105
Gilgit Baltistan	0	0	4	28		32	-
Total	17	20	111	2,245	2,393	2,393	4,550

Registered Hotels and Restaurants in Pakistan



Source: Department of Tourist Services

