# INITIAL ASSESSMENT AROUND TWENTY-THREE SITES WITH SPECIAL REFERENCE TO WOMEN BUSINESS/ ENTREPRENEURSHIP DEVELOPMENT THROUGH TOURISM PROMOTION IN PUNJAB

GALLUP PAKISTAN
Affiliated with Gallup International
Pakistan's Foremost Social Research Lab

**Contact details:**

**Islamabad:**

Phone: +92-51-2655630
Fax: +92-51-2655632
Email: isb@gallup.com.pk
www.gallup.com.pk
www.gallup-international.com



Gallup Pakistan, the Pakistani affiliate of Gallup International, is a leading survey research agency and an emerging Social Science Research Lab in Pakistan. Gallup Pakistan is a specialist in independent third party evaluation and ratings.

This report is prepared by Gallup Pakistan for the World Bank.

# Contents

## List of Tables

## Abbreviations

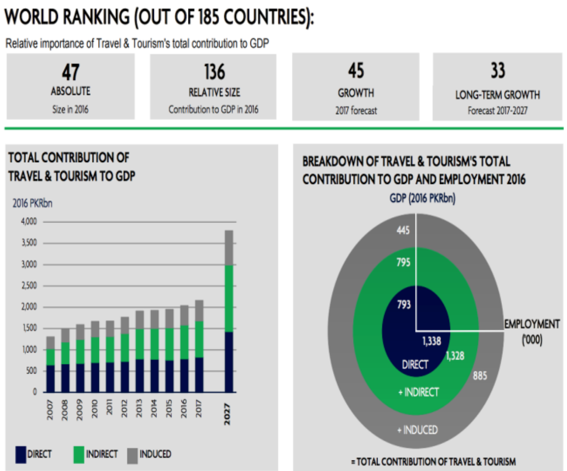
| | |
|---|---|
| DCO | District Coordination Officer |
| DK / NR | Don't know / No response |
| ETPB | Evacuee Trust Property Board |
| GDP | Gross Domestic Products |
| GoP | Government of Pakistan |
| GoPb | Government of Punjab |
| GPS | Global Positioning System |
| JCT | Information and Communications Technology |
| OECD | Organisation for Economic Cooperation and Development |
| P&DD | Planning and Development Department |
| PTDC | Pakistan Tourism Development Corporation |
| TDCP | Tourism Development Corporation of Punjab |
| TMA | Tehsil Municipal Administration |
| UNESCO | The United Nations Educational Scientific and Cultural Organisation |
| WBG | World Bank Group |

# Executive Summary

Pakistan is blessed with remarkable wealth in natural, historic, and cultural heritage. These endowments highlight the tremendous potential locked in the country's tourism sector. Globally, tourism has grown at an impressive scale to become a dynamic engine of economic growth. Despite facing serious headwinds from unpredictable shocks from political instability and security, health pandemics, sluggish economic growth, and natural disasters, this sector was valued at USD $7.6 trillion in 2016, and accounted for 292 million jobs worldwide – equivalent to one in every ten jobs in the global economy.[1]

Despite the sector's potential positive socioeconomic impact, tourism's potential in Pakistan remains underutilized. The sector has evolved in the larger, complex and challenging macroeconomic and political context: terrorism, violence, and insecurity; political instability; institutional weaknesses e.g. in economic governance; inequality and poverty; scarcity of investment flows; and low-quality or absent infrastructure. These headwinds have eroded the latent growth potential locked in the sector.

Notwithstanding these challenges, tourism and travel make important contributions to the national economy and society: in 2016, the sector directly contributed an estimated PKR 793 billion (USD$7.6 billion), or 2.6 percent to GDP.[2] When looking at the sector's dynamic interlinkages that cut across multiple industries, tourism and travel's total direct and indirect contributions to Pakistan's national GDP in 2016 were estimated at PKR 2,033.5 billion (USD $19.4 billion), or 6.9 percent.[3] In 2016, the sector's contributions to employment, including indirect and induced jobs, were estimated at 6 percent of total national employment, or 3.5 million jobs. This is expected to rise by 2.7 percent per annum until 2027 to reach 4.7 million jobs. Total travel and tourism investment in 2016 was PKR 375.2 billion (USD $3.6 billion), and is expected to grow by 8 percent per annum to PKR 872 billion (USD $8.3 billion) by 2027.[4] The infographic, from World Travel and Tourism Council provides a snapshot of the sector in Pakistan.




[1] World Travel & Tourism Council, "Travel & Tourism – Economic Impact Pakistan, 2017", https://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2017/pakistan2017.pdf

[2] Ibid.

[3] Ibid.

[4] Ibid.

Tourism's combined footprint extends beyond economic indicators: the sector's inherent reliance on the natural environment, culture, and people, implies the presence of multidimensional, socioeconomic impacts. Recognizing tourism's potential for sustainable development, both the Government of Pakistan, and the Provincial Government of Punjab have adopted policies intended to support the growth and expansion of the sector. The World Bank has been engaged by Punjab's Provincial Government to provide technical and financial assistance in catalyzing tourism's growth multiplier in the province. This support is being launched through the Punjab Tourism for Economic Growth Project.

This study was commissioned by the World Bank to understand the business landscape and customer experiences of visiting 23 selected tourist sites across the province. A key objective of this research project was to delineate the engagement of youth and women in the sector – typically underrepresented in most economic activities and policy thinking. Given this scope of work, Gallup Pakistan completed a detailed survey exercise around these selected sites to list businesses, and collect granular information on the supply and demand-side dynamics. This Report presents these results and analyzes them at length.

Overall, several key insights were gleaned from the information provided to Gallup by listed businesses. The most significant finding for this study is that the majority of all listed businesses are small-scale, micro enterprises. These businesses generate limited revenues (< PKR 1,000 per day), have a single outlet/branch, and employ a limited number of employees. The small operational footprint of these enterprises can also be deduced from the fact that an average business listed in this study is started with total average investment of **PKR 156,661** per business. This finding broadly accords with the anecdotal and informed insights available for businesses around tourist sites in Punjab. Most such businesses are indeed small-scale operations that require limited capital investments and rolling inventories to service tourists visiting the area. This finding alludes to the need for programmatic interventions designed to increase access to financial resources that could help businesses increase the quantum and value of business investments. Such investments are likely to act as a multiplier for the economy the sites. 63 percent of all businesses reported that a lack of money i.e. financial investments was an obstacle for expanding their business operations.

Most tourist businesses, in line with the sectoral dynamics, have seasonal flows. Around the sites selected for this study, the ebb and flow of this seasonality converges around festivals and events organized periodically throughout the year. Critically, businesses listed around these sites appear to be inefficient: while they experience increased revenues around seasonal high-flows, their profitability declines as revenues increase. This finding shows that the businesses are either operating with operational inefficiencies or imbalanced cost structures that depress potential profitability. Here, businesses can benefit immensely through technical support that helps them revamp operations, such that the revenue-cost dynamic attains better balance.

This study also focused on the economic impacts generated by these businesses for youth and women. On the aggregate level, the limited operational scale of these businesses restricts total employment generated by the business. Young male workers do tend to find employment in tourist businesses around the 23 selected sites. On average, these businesses employ at least one male worker below the age of 25 years. However, women remain completely locked out from the operations and economic footprint generated by these businesses. Only two businesses in the listing directory reported employing women, while no women owners were running businesses around the 23 sites. Furthermore, part-time work opportunities remain limited, as very few businesses reported employing part-time workers.

From a technical skills point of view, most businesses are operating with low labour skills. 92 percent of all businesses reported that employees in their industry/business neighbourhood did not have formal training or skills to run these tourist businesses. Despite this low skills penetration, slightly more than half of all business (55 percent) did report that training workers in tourism and business skills is likely to improve worker efficiency, and improve business operations (27 percent). This calls for educating business owners on the benefits seeking skills development for workers, and then following up this effort with access to formal technical tourism skills development opportunities for both business owners and employees.

Looking forward, businesses reported that lack of financial resources, low profitability, and weak law and order situation around the tourist sites were operational challenges for their businesses. This finding suggests that businesses need targeted interventions to improve these variables, which will likely help improve the overall business climate around these sites.

Despite challenges for these businesses, both intrinsic to the operations and extrinsic in the local economic environment, 83 percent of business owners indicated that their operations were improving, while 64 percent expected their businesses to improve in the short-term. A notable feature of the overall causes of deterioration in business performance was attributed to governance weaknesses e.g. regulatory pressures and burdens (36 percent). Most of the sites included in this study are governed by multiple and competing jurisdictions exercised by provincial and district-level authorities. In addition, religious tourism sites and the attached economies are further tightly regulated by management, influential local actors, and government authorities. Easing this regulatory burden and simplifying governance is likely to open up the space for these businesses to improve their performance and increase their impact.

The customer (tourist) dimension of this study generated important demand-side insights around the 23 selected sites. The majority of visitors to these sites are a first-time visitor (61 percent), which indicates that the tourist flows to these sites are increasing, and fresh, new visitors are thronging these attractions. This finding was confirmed when 68 percent of all visitors reported that they first visited the site in 2017. 64 percent of all visitors are going to these sites in groups, while a third are arriving alone.

A key insight generated by this study was the source of this demand: 62 percent of the visitors indicated that they were visiting the area after recommendations from friends and family. This implies that for these businesses customer satisfaction, branding, and loyalty are critical. Unless enterprises operating in the area provide satisfactory services to their customers, they are likely to lose out on word-of-mouth recommendations that seem to be driving tourist flows to these sites. While tourist traffic is increasing around these sites, most tourists are same-day visitors that typically spend between one and four hours at the site (68 percent of all visitors). This indicates that businesses around these sites need to diversify product and service offerings, while the overall activities around these sites need to be increased to keep visitors around for longer – extended duration stays would increase tourist expenditure, and therefore, revenue sources for the businesses.

Overall, tourists to these sites are satisfied with their visit: 51 percent rated their experience of visiting the site as very good. This high level of satisfaction is critical to sustaining high levels of tourist flows in the long-term. However, several challenges were identified by tourist respondents, that underline the need to improve specific features of these sites: 21 percent reported the need for improving washroom facilities, 24 percent pointed to the need for more female-friendly washroom facilities and infrastructure, 43 percent highlighted the need for more gift and souvenir shops, while 36 percent rated the available services as moderate for children. These services and related infrastructure can be improved to enhance the overall environment and its attraction for tourists.

Highlights from the data are briefly listed below:

**Business-side:**

- **Most businesses are small-scale and micro enterprises.** These small businesses involve small-scale investments, and are generating limited revenues, profits, and incomes for their owners. Almost all businesses listed in this exercise have a single branch. Relatedly, this indicates low carrying capacity for the majority of businesses.

- Nearly all businesses are operating a single enterprise; the average age of an enterprise is seven years, however, their operations are still run at a limited scale; average investments in businesses is around PKR 150,000; and 95 percent of all listed businesses are generating incomes well below PKR 1 million per year; average physical area of most enterprises was recorded as 198.44 square feet; and 97 percent of all business are sole proprietorships.

- **Most businesses are concentrated in two broad categories**. Food vendors and souvenir shops were the most common types of businesses around the selected sites. 44% percent of all listed businesses were running food businesses (vendors), while 25 percent were souvenirs shops selling pottery and decoration items.

- **Listed businesses are competing on restricted verticals**. Given the lack of diversity in types of businesses operating around core sites, competition is intense for revenues and profits. This finding is connected to the previous point. 69 percent of all businesses are operating in just two verticals (restaurants and souvenir/retail shops).

- **Collectively, businesses around these sites are generating limited employment opportunities**. Most businesses generate between one and ten jobs per enterprise for full-time male employees. On average, businesses around these sites employ around 1 worker per enterprise.

- **Youth are represented in the limited jobs generated by businesses**. Young male workers find employment opportunities in the businesses. But the small-scale of operations limit the total number of job opportunities. On average, each business is employing one worker under the age of 25 years.

- **Women are absent from employment and ownership of businesses**. All businesses typically only employ male workers. Women are neither workers nor owners in the tourist economy around the 23 sites selected for this study.

- **Businesses are under-exploiting multiple verticals**. A typical tourist's journey is composed of multiple experiences across demand for varied products and services. Currently, businesses around these sites are operating in isolated business verticals.

- **Inefficiencies are common in listed businesses**. Most listed businesses generate limited revenues, and profits decline as revenues increase. This reflects the presence of high costs and operational inefficiencies.

- **Informality is common across all businesses**. Most businesses are sole proprietorships that are not members of any business associations. This implies a high degree of informality that imposes inefficiencies and limited operational impact.

- **Demand for better security, investment resources and better infrastructure is high**. The majority of listed businesses indicated that they viewed improvements in the law and order situation, access to business investments, and investments in the overall infrastructure as critical to their business' success. For example, on an average day, profit margins for 14 percent of listed businesses decline as they move into revenues between PKR 1,000 to PKR 2,000.

- **There is a window of opportunity for female entrepreneurship**. Customers indicated a desire to see more gift shops around the sites. Business owners reported that women in their cities/regions are engaged in producing traditional handicrafts and goods. These products can be brought to the market by encouraging and incentivizing female entrepreneurship in this vertical.

**Customer-side:**

- **Word-of-mouth attracts high tourist volumes**. Customers visiting listed sites indicated a high preference for recommendations passed along by friends and family who had previously visited. This implies that positive experiences of visiting these sites likely results in higher customer traffic. 67 percent of the arriving tourists had heard of the site from their friends, while 58 percent had also received information from close family members. 62 percent of all incoming tourists reported that they had come to site because of recommendations passed along by friends and family members.

- **General Satisfaction levels are healthy**. Most customers rated their overall experiences as positive, which augurs well for the long-term viability and potential of these sites. 51 percent of all visitors rated their experience of visiting the site as very good.

- **Demand for better facilities is high**. Customers indicated that better facilities e.g. washrooms and recreational facilities are lacking around the tourist sites.

- **Short-duration stays:** Most tourists are arriving at these tourist sites for short duration trips, which limits the scale of economic impact generated by tourist expenditure. 68 percent of all tourists were planning on staying between one and four hours, while 52 percent were on a same-day trip.

- **Women and children are under-serviced.** Respondents reported that generally, services and products for women and children, e.g. gifts, are in short supply around these sites.

# TOURISM AND SOCIOECONOMIC DEVELOPMENT

CHAPTER 1

# CHAPTER 1:
# TOURISM AND SOCIOECONOMIC DEVELOPMENT

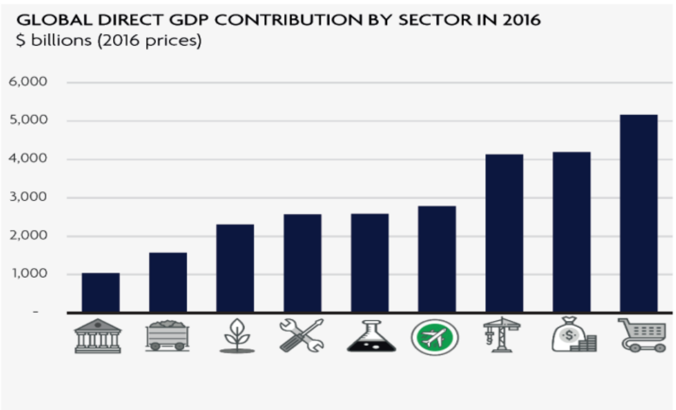
Tourism is a major global industry. In the early 2000s, several estimates (mostly from the World Travel & Tourism Council) identified it as the largest industry in the world by virtually any economic measure, including: gross output, value-added, capital investment, employment, and tax contributions.[5] Historical trends from the World Tourism Organization (WTO) show almost uninterrupted growth since 1950:[6]

Table 1: **World Tourism Growth 1950-2002**

| YEAR | International Tourist Arrivals (Millions) | International Tourist Receipts (US $ billions) |
|---|---|---|
| **1950** | 25.3 | 2.1 |
| **1960** | 69.3 | 6.8 |
| **1970** | 165.8 | 17.9 |
| **1980** | 286.0 | 105.3 |
| **1985** | 327.2 | 118.1 |
| **1990** | 457.3 | 263.4 |
| **1995** | 552.3 | 406.5 |
| **2000** | 696.7 | 474.4 |
| **2002** | 715.6 | 478.0 |

More recent data from the World Travel & Tourism Council further underscores the economic significance of the industry. As seen in the Figure below, Travel and Tourism accounted for USD $2.3 trillion in 2016 in the Global GDP.[7]

Fig. 1:




[5] William F. Theobald, "*The meaning, scope, and measurement of travel and tourism*" in "*Global Tourism*", by William F. Theobald. Routledge, London, U.K. 2012.
[6] Ibid.
[7] World Travel & Tourism Council, "How Does Travel & Tourism Compare to Other Sectors", 2017.

The sector's GDP contribution is greater than automotive and chemical manufacturing sectors, while it was 60 percent of the global construction industry in 2016. Crucially, travel and tourism generated an impact of USD $7.6 trillion in 2016, which lagged only financial services and retail sectors. Alternatively, the direct and indirect impact of travel and tourism on the global economy accounted for 10.2 percent of the global GDP in 2016.[8]

Tourism and travel combine to generate an equally large footprint on employment across the world. In 2016, WTTC estimated that the sector sustained 108.2 million jobs, which is greater than every other sector except for agriculture, construction, and retail trade. From a holistic perspective, travel and tourism collectively supported 292.2 million direct, indirect, and induced jobs across the different industries tied to the sector – which are 9.6 percent of global employment figures in 2016.[9] Growth prospects for the sector are also healthy. While the global economy was expected to grow at 2.7 percent per annum in 2016, tourism and travel were projected to grow at a healthy 4 percent per annum.[10] These numbers tell the story of tourism's economic imprint on all levels of the economy. The sector incorporates multiple industries, generates substantial economic impact, and can act as a growth multiplier at the local and national scales.

These impacts of tourism on local, regional and international economies have been extensively documented and researched through robust empirical impact measurement models.[11] This measurement of tourism's economic impact has a long and established pedigree in economic research. Effectively, the impact of tourism activity – particularly economic impact, is determined by the volume and profile characteristics of tourists.[12] These characteristics include length of stay, type of activity, mode of transport, purchasing power etc.

Tourism's economic impact manifests through three channels:[13]

- Direct impact: Value added by employees and businesses through accommodation, transportation, recreation, and other related sectors.
- Indirect impact: Supply-chain impact that accrue through inter-industry linkages.
- Induced impact: Measure of impact generated by incomes earned directly and indirectly, as they are spent in the local economy.

---

[8] World Travel & Tourism Council, "How Does Travel & Tourism Compare to Other Sectors", 2017.

[9] Ibid.

[10] Ibid.

[11] Brian Archer, Chris Cooper, and Lisa Ruhanen, "*The Positive and Negative Impacts of Tourism*" in "*Global Tourism*", by William F. Theobald. Routledge, London, U.K. 2012.

[12] Ibid.

[13] Oxford Economics, "The Comparative Economic Impact of Travel & Tourism", *World Travel & Tourism Council*, 2012.

Tourism injects economic value through its inter-industry linkages, and can create an outsized influence on the overall local economic activity – especially in low and middle-income, developing economies. Chang et al. (2009) show through their research across countries, that developing countries, and economies with low-to-medium levels of tourism specialization, can generate significant economic growth through growth and activity in this sector.[14] This average multiplier effect for the sector has been estimated at around 3.2 i.e. for every dollar spent directly on travel and tourism-related expenditures, $3.2 are generated through indirect and induced impact channels.[15] Evidence shows that tourism can act as the engine of growth for low and middle-income economies through two pathways. First, it generates value spinoffs that spread through the inter-industry linkages built around tourism. Second, the sector has the dual advantage of attracting capital investments in infrastructure in local economies, as well as generating employment, and simultaneously promoting culture and heritage. Tourism's positive socioeconomic impact has been documented

Recent research on tourism has matured into the multidimensional impact shadow cast by the sector. This approach views tourism as a social phenomenon, *not* just a production activity; the sum of expenditures of all travellers for *all* purposes; and an experience or process, *not* just a product.[16] The major emerging finding from this body of literature highlights direct, indirect and induced industrial linkages and impacts that are driven primarily by the tourism flows into and through an economy. Furthermore, not all of tourism's impacts are positive. Carrying capacity issues have been identified with a number of tourist destinations that highlight the sometimes negative consequences generated by tourist flows to certain sites.[17]

## Tourism: Women & Youth

Men and women have highly gendered socialization experiences, which filter through in differences in not only how tourism is viewed, but also in the division of labour and economic participation within the industry.[18] Women around the world generally, and in Pakistan specifically, are largely locked out of participation in the labour force due to cultural, economic, and social barriers. This form of economic marginalization closes off many economic sectors for women's equal participation. Significantly, tourism, at least in theory, presents an exception to this status-quo. Given the low-skills level requirement, high degree of mobility, seasonality,

[14] Chia-Lin Chang, Thanchanok Khamkaew, and Michael McAleer, "A Panel Threshold Model of Tourism Specialization and Economic Development", *CIRJE Discussion Paper*

[15] Ibid.

[16] Thomas L. Davidson, "*What are travel and tourism? Are they really an industry*", in "*Global Tourism*", by William F. Theobald. Routledge, London, U.K. 2012.

[17] Brian Archer, Chris Cooper, and Lisa Ruhanen, "*The Positive and Negative Impacts of Tourism*" in "*Global Tourism*", by William F. Theobald. Routledge, London, U.K. 2012.

[18] Linda K. Richter, "*Exploring the Political Role of Gender in Tourism*", in "*Global Tourism*", by William F. Theobald. Routledge, London, U.K. 2012.

and general labour market flexibility, tourism can be a significant source of employment for women.[19]

Empirical data confirms the higher proportional participation of women in businesses based on tourism. For example, around 50 percent of all workers in the accommodation, hotels and restaurant industries in the EU-27 have been reported to be women.[20] However, research also shows two significant barriers to translating women's participation in the tourism sector in robust economic gains. First, tourism businesses tend to be vulnerable to seasonal variations and cycles, which imply a higher proportion of low-skilled, part-time work. While this opens up opportunities for women, it also implies that the employment can be precarious. Second, tourism jobs are generally low-income jobs with shorter career trajectories i.e. upward professional mobility has a ceiling. These are critical factors when considering the gender dimensions of tourism's contributions to the local economy and labour force.

Youth employment in tourism has also been the subject of research into the employment dynamics and impacts associated with the sector. In general, tourism jobs are low-skilled occupations with low barriers to entry, and relatedly, low wages. This structural and operational feature of the industry makes it particularly attractive for young workers either seeking entry into the labour force, or transitioning between different employment and skills stages.

Overall, tourism businesses tend to be small-scale, which implies that they provide short-term, limited employment opportunities for women and youth. This study reveals this dynamic around the sites selected for analysis. Further discussion and results analysis of women and youth in tourism around the selected sites is contained in Chapter 6 of this Report.

## Tourism: Sustainable & Human Development

Tourism's impact link with sustainable and social development is intrinsic to the nature of production and consumption in the industry. Tourism is a resource industry, which is "dependent on nature's endowment and society's heritage."[21] It depends on the natural and human elements of a given place and society. Given these inherent social, human, cultural and environmental dimensions of the sector, the range and quantum of impact channels goes beyond strictly economic values.

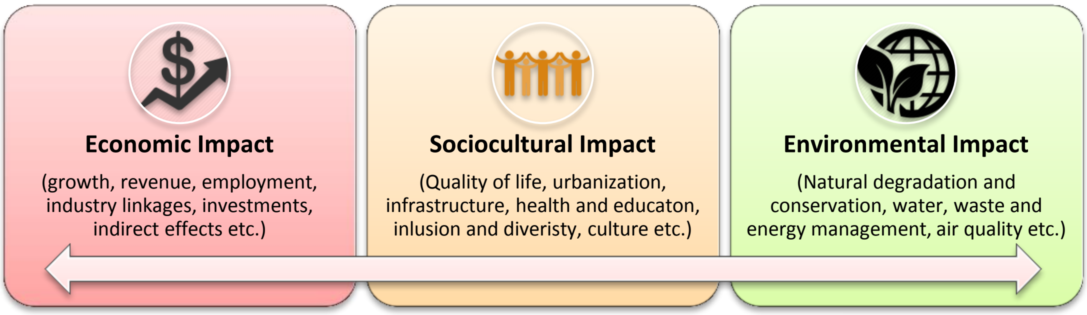
[19] Lucy Ferguson, "Promoting Gender Equality and Empowering Women? Tourism and Third Millennium Development Goal", *Current Issues in Tourism*, 14, no.3: (2011)

[20] Alka Obadic and Ivana Maric, "The Significance of Tourism as an Employment Generator of Female Labour Force", 2009.

[21] Peter E. Murphy and Garry G. Price, "*Tourism and Sustainable Development*", in "*Global Tourism*", by William F. Theobald. Routledge, London, U.K. 2012.

The measurement of social and environmental impacts in and around tourism has lagged behind. Research on secondary and tertiary impacts of tourism on social and human development dimensions is insufficient in its scope and empirical rigorousness. When mapping the impact channels and footprint of the tourism economy, it is crucial to include and assess these multidimensional factors that affect long-term sustainable development and functioning of an economy. The diagram below aims to collect and represent these diverse socioeconomic impacts:

Fig. 2:




## Tourism Development in Punjab: Project Context

Tourism is a large and growing market that Pakistan could better serve to create more and better jobs. Pakistan is home to numerous important historic sites linked to the Indus Valley civilization, a Bronze Age civilization in north-western Pakistan, the Mughal Empire and colonial era monuments. It hosts the holiest sites of Sikhism and many important pilgrimage sites for Buddhists, Hindus and Muslims. In 2014, the direct contribution of travel and tourism in Pakistan was 2.9 percent of GDP and the sector supported 1.4 million jobs. The total contribution of travel and tourism was 6.9 percent of GDP and the sector supported 3.5 million jobs. This is significantly lower than in South Asia at large: according to the World Travel and Tourism Council, in 2014, the travel and tourism industry in South Asia generated 9 percent of GDP and supported 5 percent of employment. Approximately 40 percent of the world tourism revenue is linked to religious tourism and this is a market with tremendous potential that Pakistan has hardly started to develop. The tourism sector could be turned into an important income source and engine for employment.

Tourism development is a priority both at the federal and provincial levels and the World Bank has worked closely with the GoPb in assessing the sector. The GoP and the GoPb both target tourism development as a means to generate more jobs and to promote regional cooperation. In 2014, the GoPb requested support from the World Bank Group (WBG) to produce a series of studies to assess the potential of the sector and explore options for a lending program. The analytical work and consultations conducted until date highlight that a stronger historical, leisure and cultural and heritage tourism sector would not only help promote economic development and better protect the country's cultural heritage but also help project a softer image of the country and its most populous province. Theory and evidence on the tourist economy in low and middle-income countries, as shown in the preceding section, show that it can become an engine of socioeconomic development.

There is proven private sector interest to invest in new accommodation and improved infrastructure and logistics services linked to tourism. A combination of an inadequate response by concerned authorities and regulatory burdens impede progress. This finding is supported by the empirical data discussed in the following chapters of this report.

GoP and the GoPb are greatly interested in implementing a Tourism for Economic Growth project, and the private sector and civil society are strongly supportive of such an initiative. The Chief Minister of Punjab established a Steering Committee on July 7, 2015, to oversee promotion of tourism, especially cultural and heritage tourism, in the province. It is chaired by the Minister of Tourism and comprises senior representatives from the Planning and Development Department (P&DD), Tourism, Archaeology and Youth Affairs, Home Affairs, Finance, Construction and Works, the TDCP and a Member of the Punjab Assembly. Two private sector representatives have also been invited to join the committee. A sub-committee was formed in November 2015 with key focal points from the TDCP, the ETPB and District Coordination Officers (DCOs). The DCOs serve as lead persons, or project directors, for the sites in their areas. Finally, the GoPb has also recently set up an Advisory Council comprising distinguished professionals to oversee the overall policy related to the promotion of tourism and project implementation. These proactive initiatives show a commitment to turn this project into an effective vehicle for tourism development and socioeconomic development.

The World Bank's Punjab Tourism for Economic Growth Project aims to assist the GoPb in catalyzing growth in the provincial tourism sector. The project is designed to strengthen institutional capacity, increase private sector participation and improve infrastructure services in support of the provincial tourism sector. The project has four core components:

- **Policy, Institutions and Governance for Tourism Development**: for better policy and sector coordination, public governance, and knowledge outreach.
- **Private Investment and Entrepreneurship Promotion**: to encourage private participation and leadership in the development of the sector and the emergence of a better trained workforce.
- **Public Investment Facility**: to strengthen infrastructure services that can improve access and support facilities to and around the sites.
- **Project Management, Monitoring and Evaluation**: for daily project implementation activities.

The project aims to achieve the following results:

- Increased number of visitors to the targeted sites;
- Number of reforms implemented (as outlined in the Punjab Tourism Policy);
- Amount of private tourism-related investment facilitated;
- Number of individuals benefitting from improved infrastructure and training.

This research project aims to feed into the Bank's overall project activities. The following Chapters detail and analyze the empirical data collected from the sites chosen.

# OBJECTIVES & METHODOLOGY

CHAPTER 2

# CHAPTER 2:
# OBJECTIVES & METHODOLOGY

This project was undertaken by Gallup Pakistan to meet the objectives defined by the World Bank. This study was designed to comport on to the objectives and scope of work set by the Bank. Gallup interpreted the core objectives of the assignment as:

- **Quantifying and Listing of all Businesses and Economic Activity around the 23 Sites**

  An assessment of businesses that currently benefit from domestic and international tourism around selected sites included covering the number of businesses currently working around the identified sites and making a directory of such businesses.

- **Profiling the Businesses**

  Once the listing of businesses was completed a detailed profile of the businesses was drawn, including the following factors:

  a. Extent of economic benefit / value creation by the businesses.
  b. Extent of employment generation by listed businesses.
  c. Breakdown of employment by age so that the Bank can assess whether tourism sector in its current state is generating employment for youth or not and what is the potential the sector carries.
  d. Within the businesses employed or run by youth, understand the penetration of skills and technical training.
  e. Perception of Businesses regarding current challenges they face and impediments that obstruct entrepreneurship development in tourism and travel.

- **Identification of Potential in Future**

  The study identifies potential areas of business development and employment generation with the current inflow of tourists. Recommendations to overcome the impediments that businesses currently face in serving the tourists around these sites and in general about ease of doing business have been provided.

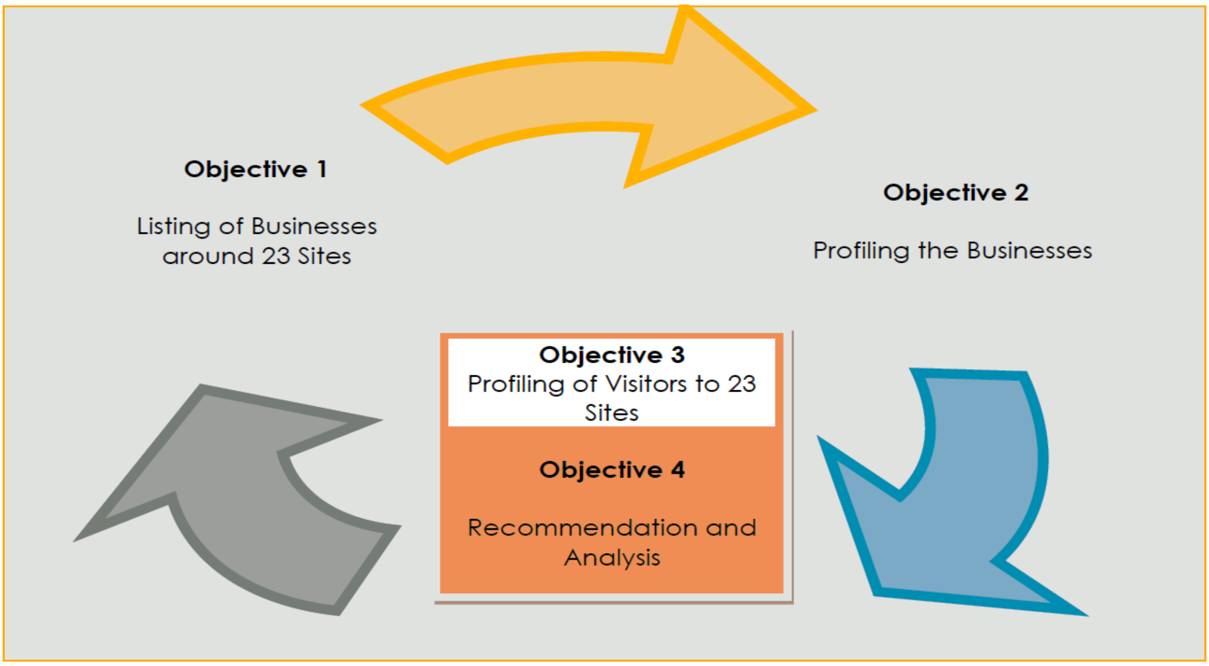
- **Profiling of the Site visitors: Who visits and Why?**

  Profile of the visitors, gender segregated, including, but not limited to:

  a. Spending patterns of visitors to shrine,
  b. Group size,
  c. Frequency of their visits,
  d. Places of origin etc.

The following diagram shows the mapping of these core objectives:

Fig. 3:




## Description of Approach

Based on our understanding of the objectives of the study, Gallup Pakistan proposed the following Modules:

Module 1: **Literature Review / Desk Research**

Module 2: **Listing of Business**

Module 3: **Survey of Businesses**

Module 4: **Survey of Site Visitors**

## Detailed Methodology for the study

This section provides details on the 4 modules implemented by Gallup for the study. We believe that these four components helped understanding and developing key insights into the tourism potential as well as current trends into businesses affected or influenced by tourism in the specific region / sites.

Furthermore, combined together the four modules highlight case studies and provide ethnographic voices to the study, which help triangulate the data.

### Module 1: Desk Research

Desk research for this study was done by senior researchers at Gallup and supported the primary research activities as per the proposal. The need for Desk Research before embarking on the main modules of the study was critical because of the dearth of empirical information on the size of tourism industry, its composition (regional, geographical, demographic) and its impact at macro and micro levels. Some information available is from before 2010, before passage of the 18th amendment in the country which devolved Tourism to provincial level and thereby reducing the level of attention paid to this industry.

The desk research included information on:

- Tourism landscape in Pakistan and the region,
- Understanding which types of businesses are directly and indirectly effected by tourism across the world and in the region
- Detailed analysis on each proposed site through online information, Government Published data, as well as academic research.

The desk research was crucial in defining the direct and indirect beneficiaries of tourism and therein identifying the key stakeholders for detailed interviews as in component II.

### Module 2: Business Listing around the 23 Shrines

#### Universe Identification

The universe for the business listing and interviews study were businesses that may benefit from tourism / travel on the allotted sites and was in relatively close proximity* of the site.

#### Coverage within 1 KM radius of the Sites

For this purpose, we listed all such relevant businesses (business type / profile may be confirmed from the desk research as well as stakeholder interviews). The geographic proximity for the listing was 1 Km.

## Screener Questionnaire

We understand that one key challenge during the business listings across the 23 sites was to isolate those businesses which are affected in a meaningful way from the tourist crowds attracted to the relevant tourist spot.

Therefore, we implemented a screener questionnaire for each of business within the 1 KM radius and only those that qualified the Screener were included in the Directory developed by Gallup.

The Screener questions assessed the proportion of Sales attributable to the Site visitors (according to the business owner). Only businesses with 10% or more of their monthly business attributable to the site were included in the later stages of the study.

## Expected Businesses around the Sites

Anecdotal experience suggests that the sectors (directly or indirectly) affected by tourism around these sites include (but not restricted to)

i. Transport
ii. Construction
iii. Trade / Crafts
iv. Agrifood
v. ICT etc.

## Expected number of listings

In order to make the exercise practical and for proposal writing and costing purpose we have assumed that the Business Listing would be restricted to a maximum of **50 (average amount)**. This would mean that our listing exercise in the end would generate approximate Directory of 23*50 Businesses i.e. **1150**

## Businesses

The consultant expected this number to vary by 15-20% in the end and the relevant timeline and cost accounts for this variation. Also note that 50 businesses was not a ceiling used by Gallup. The criteria remained 1 KM Square around the main entrance of the site for Business Listing.

**Mode of Data Collection**

Data was collected using Paper and Pencil Questionnaire by specially trained Enumerators. A Questionnaire was specifically designed to capture the information for the Listing exercise.

**Information to be collected**

Limited information was collected at the Listing stage of the survey. Detailed information was collected in Module 3 of the survey. This was both for practical purposes as well as to ensure that Quality responses were being achieved from the field.
The information collected at this stage included:

- Name of Business
- Business Sector
- Business Occupation Group
- Size of Shop
- Total Number of people working at the business (by age and Gender)

### Module 3: Survey of Random Businesses around the 23 Sites

The purpose of this module was to collect detailed information from the businesses that are operating around the 23 Sites selected.

**Universe**

As per Gallup's preliminary estimates the upper limit of businesses around the 23 sites was restricted to between 1200-1400 Businesses in total.

**Proposed Methodology**

Gallup believed that seeking detailed information from each of these businesses would be expensive and redundant. We therefore suggest a sample of 20- 25 businesses around each site thus leading to a sample of ~500 businesses who became respondents to this module.

**Sampling Methodology**

Simple Random Sampling was used for the detailed Business Survey. All the businesses listed at each of the site were used as a universe; and 20-25 businesses were selected using a simple random draw.

**Questionnaire**

A structured Questionnaire was designed looking at following issues (see Appendix for questionnaires):

a. Extent of economic benefit / value creation by listed businesses.

b. Extent of employment generation these businesses are creating and employing.

c. Breakdown of employment by Age so that the Bank can assess whether tourism sector in its current state is generating employment for youth or not and what is the potential the sector carries.

d. Within the businesses employed or run by youth, it would be important to know whether they get any formal training or not.

e. Perception of Businesses regarding current challenges they face and impediments that obstruct entrepreneurship development in tourism and travel.

**Note:** Our literature review suggests that many of these sites would have seasonal traffic. Some religious sites would have more traffic (and therefore more business) during certain days of the week (Thursday's are generally busier) and during the Annual Urs. Similarly, summer vs. winter season flow of traffic (and therefore business activity around) may vary. The Gallup Questionnaire looked at various segments of the year when seeking information on Sales, Employment, Profit, Problems etc.

**Data Collection Method**

Paper and Pencil Questionnaires were used for data collection. A trained interviewer from Gallup Pakistan team interviewed the business at the business site.

**Survey Respondent**

It was preferred that the survey respondent is the owner of the business. This ensured that most accurate information is achieved.

**Mix of Qualitative and Quantitative**

The Questionnaire had a Qualitative Segment which would have open ended and semi closed questions. This was to ensure that we have a detailed and in-depth understanding of the issues of the businesses in the area and how their tourism potential can be uplifted.

**Distribution of Business Surveys across 25 Proposed Sites**

Following table shows proposed distribution across 25 Sites:

Table 2: **Proposed Distribution of Business Surveys**

| Site | Type | District | Business interviews Sample | Accepted/ Dropped |
|---|---|---|---|---|
| **Site at Garhi** | Archaeological site | Attock | ~20-25 | Dropped |
| **Shrine of Hazrat Makhdum Jahaniyan Jahangasht and attached mosque** | Shrine | Bahawalpur | ~20-25 | Accepted |
| **Derawar Fort** | Archaeological site | Bahawalpur | ~20-25 | Accepted |
| **Shrine of Hazrat Syed Ahmad Sultan Sakhi Sarwar** | Shrine | Dera Ghazi Khan | ~20-25 | Accepted |
| **Wangar Wala Tibba** | Archaeological site | Faisalabad | ~20-25 | Dropped |
| **Rohtas Fort** | Fort | Jhelum | ~20-25 | Accepted |
| **Raja Man Singh's Haveli** | Monument/ Landmark | Jhelum | ~20-25 | Accepted |
| **Tilla JogianTemple** | Archaeological site | Jhelum | ~20-25 | Dropped |
| **Shrine of Shaikh Ali Baig (locally called Hanjeera)** | Shrine | Mandi Bahauddin | ~20-25 | Dropped |
| **Sawi Masjid** | Mosque | Multan | ~20-25 | Dropped |
| **Tombs of Petrick Alexander Van; Andrew & William Anderson** | Monument/landmark | Multan | ~20-25 | Dropped |
| **Tomb of Shah Rukn-e-Alam** | Shrine | Multan | ~20-25 | Accepted |
| **Tomb of Shams Tabriz** | Shrine | Multan | ~20-25 | Accepted |
| **Tomb of Mai Maharban** | Shrine | Multan | ~20-25 | Accepted |
| **Clock tower** | Landmark | Multan | ~20-25 | Dropped |
| **Tomb of Thar Khan Nahar (or Tahar Khan Nahar) and nearby mosque** | Shrine | Musaffargarh | ~20-25 | Dropped |
| **Rawal Fort** | Archaeological Site | Rawalpindi | ~20-25 | Dropped |
| **Nicholson’s Obelisk** | Monument | Rawalpindi | ~20-25 | Dropped |
| **Palace** | Archaeological Site | Rawalpindi | ~20-25 | Dropped |
| **Giri Mosque and Tombs** | Archaeological Site | Rawalpindi | ~20-25 | Dropped |
| **Shrine of Hazrat Imam Ali-ul-Haq** | Shrine | Sialkot | ~20-25 | Dropped |
| **Shrine of Hazrat Syed Murad Ali Shah** | Shrine | Sialkot | ~20-25 | Dropped |
| **Shrine of Hazrat Baba Haji Sher Dewan Chawli Mashaikh** | Shrine | Vehari | ~20-25 | Accepted |
| **Khewera Salt Mines** | Site Seeing | Jhelum | ~20-25 | Dropped |
| **Kotli Sattiyan** | Site Seeing | Rawalpindi | ~20-25 | Dropped |
| **TOTAL** | | | **1200** | |

Of the above-mentioned sites, 16 were dropped after Literature Review and reconosence missions at the sites by Gallup. The main reason for dropping sites was that sufficient business activity and tourist traffic was not found. The table below lists the 23 sites where fieldwork was completed (Profile of each of these sites is available in the last chapter of this report):

| Sites | Type of Site | District |
|---|---|---|
| **Derawar Fort** | Fort | Bahawalpurr |
| **Shrine of Hazrat Syed Ahmed Sultan Sakhi Sarwar** | Religious | Dera Ghazi Khan |
| **Rohtas Fort** | Fort | Jhelum |
| **Tomb of Shah Rukn-e-Alam** | Religious | Multan |
| **Tomb of Shams Tabriz** | Religious | Multan |
| **Tomb of Mai Maharban** | Religious | Multan |
| **Shrine of Hazrat Baba Haji Sher Dewan Chawli Mashaikh** | Religious | Vehari |
| **Shrine Sakhi Saiden Shah Shirazi in Choa Saiden Shah** | Religious | Chakwal |
| **Sultan Baho Shrine** | Religious | Jhang |
| **Fort Munro** | Fort | Dera Ghazi Khan |
| **Jahangir/Noor Jahan Tomb** | Shrine | Lahore |
| **Harappa- Capital city of Indus Civilization** | Archaeological Site | Sahiwal |
| **Kalabagh** | Adventure/Sports | Mianwali |
| **Sadiq Garh Palace/Noor Palace** | Monument | Bahawalpur |
| **Cholistan Desert** | Adventure/Sports | Bahawalpur |
| **Thal Desert** | Adventure/Sports | Bhakkar |
| **Khanpur Dam** | Adventure/Sports | Haripur |
| **Jalo Park** | Adventure/Sports | Lahore |
| **Shrine & Mosque Hazrat Makhdum Jahaniyan Jahangasht** | Religious | Bahawalpur |
| **Raja Man Sing Haveli** | Monument | Jhelum |
| **Hiran Minar** | Archaeology | Sheikhupura |
| **Lal Suhanra National Park** | Adventure/Sports | Bahawalpur |
| **Khabeki Lake** | Adventure/Sports | Khushab |

## Module 4: Visitor Survey

### Rationale for the Visitor Survey

The purpose of the exit interviews was to record the visitor's journey, profile, spending patterns, frequency of visits as well as origin of visit. The interviewers may get a visitor diary filled as exit interviews from each site.

## Sample Size

We proposed a sample of maximum N 50 at each of the 23 Sites. This was to ensure that a variety of visitors to sites can be captured. This would add up to 1150 Visitors being part of the survey, and the expected Error Margin at 95% Confidence level for these 23 sites combined was +- 2-5 %.

### Sampling Methodology: Random Probability Sampling and Quota Sampling

A hybrid approach for sampling was used in order to ensure that not only the current profile of visitors to each site in general, but also a good idea about particular segments, for example foreigners who may be visiting less often but are more important to businesses in terms of their economic impact, may be captured. Moreover, the purpose of this module was to understand the problems of those visiting the sites and to see if there are business opportunities in addressing the needs of the visitors, therefore, we needed sample power to account for various categories that may be less in number currently (and therefore not naturally falling in the sample) but may be of importance in the future (Diaspora, foreigners, domestic visitors).

We therefore suggested that the interviewer complete a **Random Exit Interview** for the first 25 interviews out of the 50 needed at each site. For the rest of the 25 interviews, interviewer shifted to a **quota sampling**. Following quotas applied to the following types of visitors to sites:

Table 3: **Sampling Methodology: Random Probability Sampling and Quota Sampling**

| | |
|---|---|
| **International Travellers** | 20% |
| **Diaspora Tourism vs. heritage tourism vs. Religious / spiritual pilgrimage vs. cultural tourism vs. wild life / eco-tourism** | 40% |
| **Local (from the same Village / City) tourist** | 20% |
| **Domestic travellers/ tourist (those visiting from within Pakistan but not from same city as the site)** | 20% |

Note : During the field work despite strenuous efforts by Gallup Staff , foreign and diaspora visitors were not encountered and therefore the quota for these segments had to be dropped.

## Field Methodology

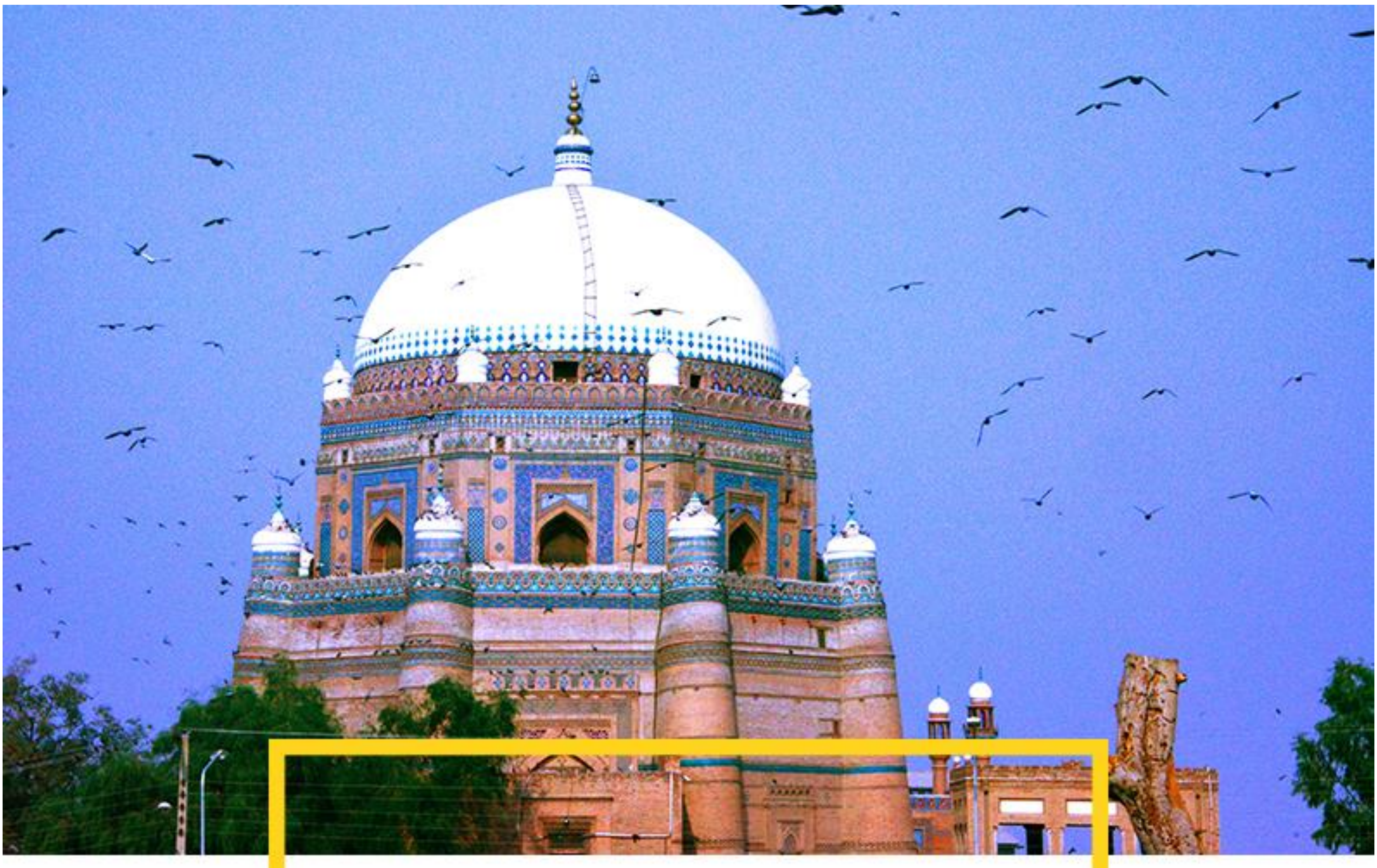
Gallup approached potential respondents coming out of the sites with an interval of 3 (depending on footfall/traffic at the specific site) and a semi-structured questionnaire was administered to the respondent if they were available and willing.

## Over view of the Proposed Methodology by Modules

Below is a snapshot of the methodology being proposed by Gallup in terms of Modules, Sample Size, Approach and Nature of Tools required

Table 4: **Over view of the Proposed Methodology by Modules**

| | Proposed Sample Size | Proposed Methodology | Proposed Total |
|---|---|---|---|
| **Module 1 : Literature Review / Desk Research** | 3-4 Interviews | Qualitative | Discussion Guide |
| **Module 2 : Listing of Business** | ~1,200-1,400 | Quantitative | Questionnaire |
| **Module 3 : Survey of Businesses** | ~ 500 | Quantitative +Qualitative | Questionnaire |
| **Module 4 : Survey of Site Visitors** | 1,150 | Quantitative | Questionnaire |
| **TOTAL** | | **~ 4,300** | |



# QUANTIFICATION OF BUSINESS ACTIVITIES

CHAPTER 3

# CHAPTER 3:
# QUANTIFICATION OF BUSINESS ACTIVITIES

Capturing and quantifying the multidimensional tourism landscape around the twenty-three selected sites for this study requires a granular understanding of the business activities in the area of interest. To achieve this objective, the research completed a comprehensive business listing exercise. For each site covered in this exercise, all businesses within a 1KM radius were listed.

The business listing exercise is a useful starting point for mapping the socioeconomic impacts of the tourism industry. Businesses within the pre-defined radius generate a directory of listings. This directory can reveal two important dimensions. First, it indicates the intensity of business activity around a site. Intensity further highlights the demand and supply of tourism activities. Second, listings reveal a comprehensive typology of businesses. Together, intensity and typology further highlights the demand and supply of tourism activities.

For the business listing module of this study, the following indicators were captured:

Fig. 4:

The indicators included in the study helped delineate a comprehensive picture of the business listings around the twenty-three tourism sites. These indicators are described below:

- Type of Business:
- Business Listings:
- Full-time/Part-Time Employees:
- Physical Area of Businesses:
- Duration of Business Operations:
- Business Revenue:
- Owner/Employee:
- Business Branches:
- Quality of Responses:

Analysis of these indicators covers the scope of work designated in this module of the study. Results for these indicators are discussed further in the rest of this Chapter.

**Business Listings:**

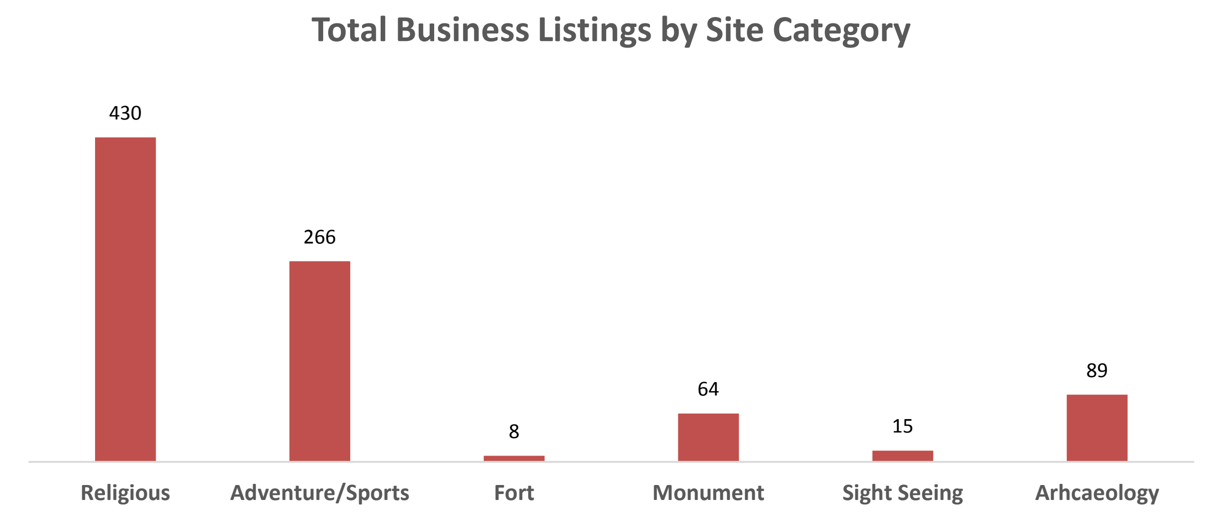
The listing module aimed at quantifying the total number of businesses operating at twenty-three sites. These numbers show the intensity of business activity at each location. The Table below displays the results for each of the twenty-three sites included in the study:

Table 5: **Business Listings:**

| Sites | Type of Site | Total Business Operating |
|---|---|---|
| **Derawar Fort** | Fort | 10 |
| **Shrine of Hazrat Syed Ahmed Sultan Sakhi Sarwar – DG Khan** | Religious | 55 |
| **Rohtas Fort – Jhelum** | Fort | 8 |
| **Tomb of Shah Rukn-e-Alam – Multan** | Religious | 51 |
| **Tomb of Shams Tabriz – Multan** | Religious | 50 |
| **Tomb of Mai Mahraban – Multan** | Religious | 50 |
| **Shrine of Hazrat Baba Haji Sher Dewan Chawli Mashaikh – Vehari** | Religious | 50 |
| **Shrine Sakhi Saiden Shah Shirazi in Choa Saiden Shah – Chakwal** | Religious | 39 |
| **Sultan Baho Shrine – Jhang** | Religious | 60 |
| **Fort Munro – DG Khan** | Fort | 50 |
| **Jahangir/Noor Jahan Tomb- Lahore** | Shrine | 39 |
| **Harappa- Sahiwal** | Archaeology | 50 |
| **Kalabagh – Mianwali** | Adventure/Sports | 57 |
| **Sadiq Garh Palace/Noor Palace – Bahawalpur** | Monument | 9 |
| **Cholistan Desert – Bahawalpur** | Adventure/Sports | 20 |
| **Thal Desert Mankera- Bhakkar** | Adventure/Sports | 41 |
| **Khanpur Dam- Haripur** | Adventure/Sports | 27 |
| **Jallo Park – Lahore** | Adventure/Sports | 43 |
| **Shrine & Mosque Hazrat Makhdum Jahaniyan Jahangasht – Bahawalpur** | Religious | 36 |
| **Raja Man Sing Haveli – Jhelum** | Monument | 5 |
| **Hiran Minar – Sheikhupura** | Archaeology | 29 |
| **Lal Suhanra National Park – Bahawalpur** | Adventure/Sports | 28 |
| **Khabeki Lake – Khushab** | Adventure/Sports | 50 |
| **TOTAL** | | **872** |

The results shown above indicate that there was great variation in amount of busineses directly or indirectly serving the tourists. Given the 1KM radius, there are several businesses operating directly in and around the sites. The Figure below shows the distribution of total business listings by site category:

Fig. 5:




Disaggregated by type of tourist site, the data shows that most number of businesses are located around religious (shines and mosques) and adventure & sports sites. A high number of business listings around these sites is indicative of demand: more tourists visit religious and adventure/sports sites than forts, monuments and sight-seeing sites. Archaeological sites are also served by a healthy number of businesses.

**Duration of Business Operations:**

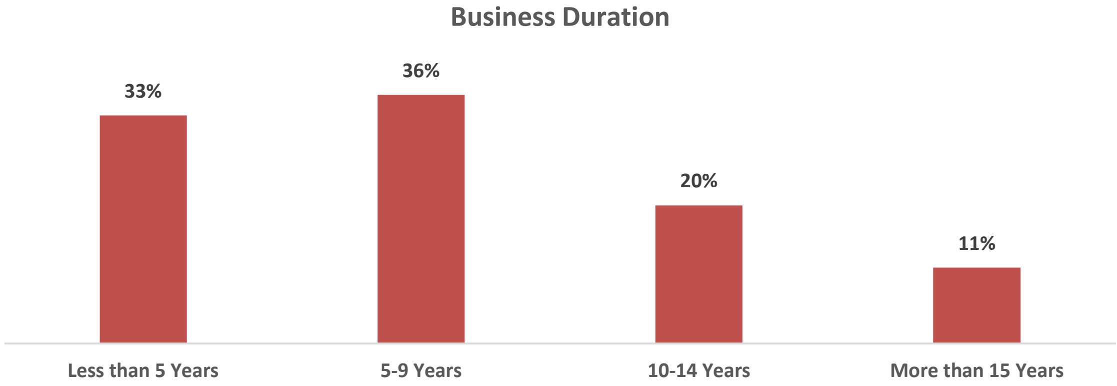
Another crucial indicator included in this module assessed the duration that each listed business has been operating at its current site. Mature and economically vibrant tourism sites have long-standing business operations. Length of operations is also a proxy indicator of the demand and supply robustness at a given tourism site. Results for this indicator are shown in the Table below:

Table 6: **Duration of Business Operations**

| Sites | Type of Site | Less than 5 years (%) | 5-10 Years (%) | 10-14 Years (%) | More than 15 Years (%) |
|---|---|---|---|---|---|
| **Derawar Fort- Bahawalpur** | Fort | 100 | 0 | 0 | 0 |
| **Shrine of Hazrat Syed Ahmed Sultan Sakhi Sarwar – DG Khan** | Religious | 7 | 25 | 25 | 23 |
| **Rohtas Fort – Jhelum** | Fort | 0 | 13 | 50 | 36 |
| **Tomb of Shah Rukn-e-Alam – Multan** | Religious | 14 | 33 | 27 | 25 |
| **Tomb of Shams Tabriz – Multan** | Religious | 14 | 38 | 32 | 16 |
| **Tomb of Mai Mahraban – Multan** | Religious | 8 | 40 | 36 | 16 |
| **Shrine of Hazrat Baba Haji Sher Dewan Chawli Mashaikh –Vehari** | Religious | 90 | 8 | 2 | 0 |
| **Shrine Sakhi Saiden Shah Shirazi in Choa Saiden Shah – Chakwal** | Religious | 56 | 33 | 10 | 0 |
| **Sultan Baho Shrine – Jhang** | Religious | 28 | 30 | 10 | 32 |
| **Fort Munro – DG Khan** | Fort | 24 | 36 | 28 | 12 |
| **Jahangir/Noor Jahan Tomb-Lahore** | Shrine | 28 | 46 | 15 | 8 |
| **Harappa- Sahiwal** | Archaeology | 14 | 56 | 24 | 6 |
| **Kalabagh – Mianwali** | Adventure/Sports | 12 | 56 | 30 | 2 |
| **Sadiq Garh Palace/Noor Palace – Bahawalpur** | Monument | 89 | 11 | 0 | 0 |
| **Cholistan Desert – Bahawalpur** | Adventure/Sports | 95 | 5 | 0 | 0 |
| **Thal Desert Mankera- Bhakkar** | Adventure/Sports | 54 | 29 | 17 | 0 |
| **Khanpur Dam- Haripur** | Adventure/Sports | 7 | 41 | 48 | 4 |
| **Jallo Park – Lahore** | Adventure/Sports | 42 | 37 | 16 | 5 |
| **Shrine & Mosque Hazrat Makhdum Jahaniyan Jahangasht – Bahawalpur** | Religious | 100 | 0 | 0 | 0 |
| **Raja Man Sing Haveli – Jehlum** | Monument | 0 | 20 | 40 | 40 |
| **Hiran Minar – Sheikhupura** | Archaeology | 34 | 48 | 17 | 0 |
| **Lal Suhanra National Park – Bahawalpur** | Adventure/Sports | 18 | 75 | 7 | 0 |
| **Khabeki Lake – Khushab** | Adventure/Sports | 20 | 54 | 20 | 6 |

This data shows that for each site covered in this study, businesses have varying lifespans. Viewed from a different angle, the Figure below includes business duration by site categories:

Fig. 6:

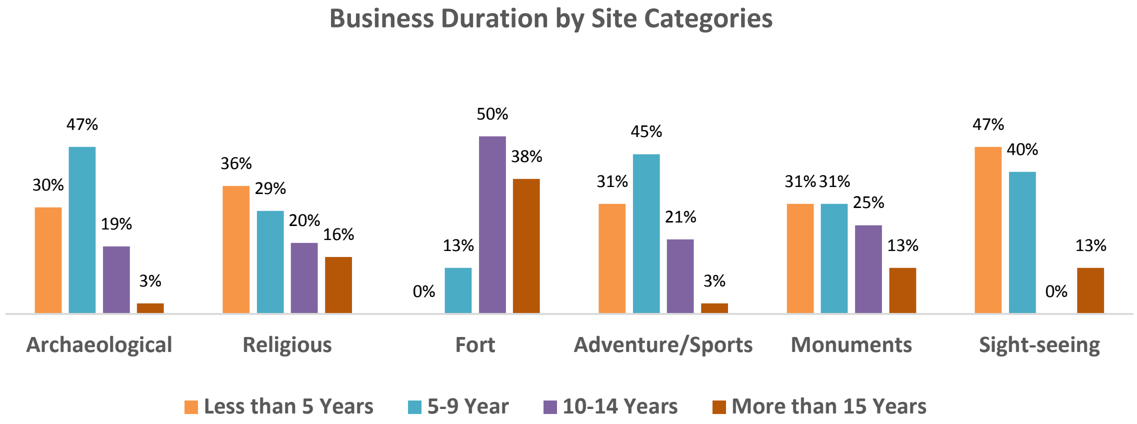



Business listing data shows that the majority of businesses servicing the sites included in this study are less than a decade old. One-third of all listed businesses have been in operation for less than five years. This implies that most businesses around these sites were established relatively recently, and are most likely still in early-stages of their operations. Since the sites have been in operation for several decades the results also point to possibly high business failures and new ones emerging to replace the previous ones, potentially pointing towards need for programmatic intervention to sustain the growth of businesses. Mature businesses around tourist sites exploit business potential along multiple service verticals. A recent Deloitte study examined this feature, and found that travel is fragmented around micro-experiences such that tourists (consumers) interact with multiple services in a single trip.[22] Early-stage businesses are more likely to operate within their vertical, and have low brand exposure and customer loyalty. Only 11 percent of businesses listed in this study have been in operation for more than 15 years. Slightly more than two-thirds of all business listings have been in operation for less than a decade. Only one in five businesses around the sites covered in this study has been in operation between 10 and 14 years.

How does this duration vary with the site category? The Figure below shows this data:

Fig. 7:

[22] Deloitte, "2017 Travel and Hospitality Industry Outlook"




Significant variance in business lifespan becomes evident when the data is disaggregated into site categories. Each of these is briefly described below:

- **Archaeological Sites:** For archaeological sites most businesses have been established over the last ten years. This reflects that tourism flows to these destination types have only been serviced by businesses in recent years.
- **Religious Sites:** For religious sites, business operation duration is more evenly distributed. While most businesses around these types of sites were only recently established, a significant number has been operating for more than 5 years.
- **Forts:** Businesses around forts have a longer operation history, with most operating for over ten years.
- **Adventure/sports Sites:** Most businesses around adventure and sports sites have been established in the last ten years. This reflects a growing service supply trend around these types of sites.
- **Monuments:** Businesses around monuments and historic landmarks have a short-to-medium operational duration.
- **Sight-seeing Sites:** Sight-seeing businesses have mostly been established within the last ten years, which indicates that these destinations have a recent history of growing tourism flows.

When the listing data is read in the aggregate, most businesses documented in this study are recent in origins, with the highest density recorded around religious and adventure/sports tourist sites.


Average Business Life-span Across All Sites (Years)

**Business Revenues:**

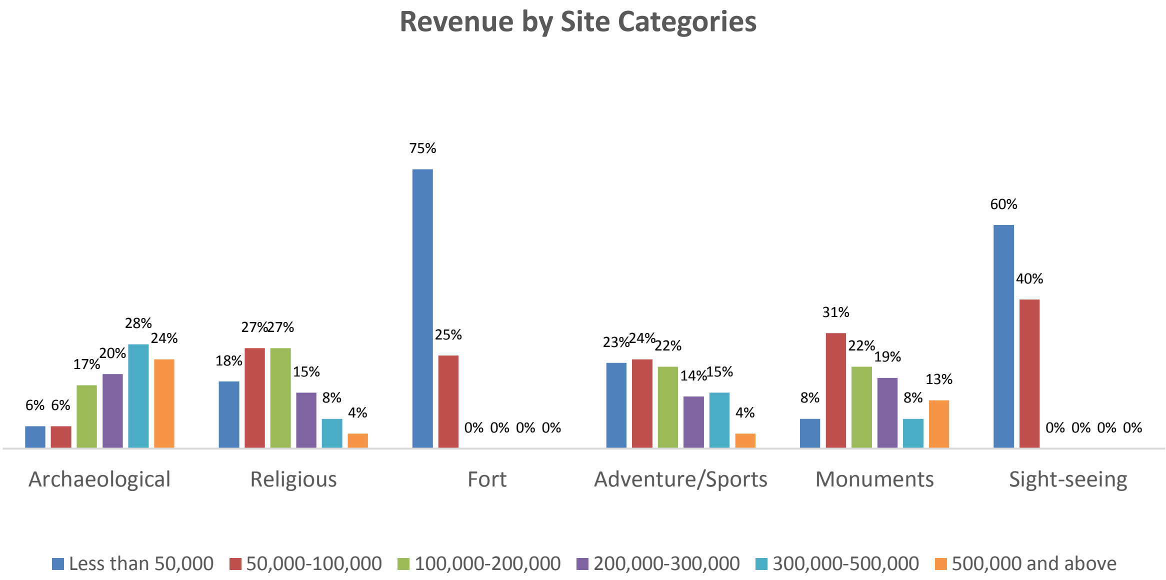
Business revenue data is a strong indicator of the volumes and value of tourist expenditure on tourism destinations. This study asked respondents to provide an indication of the annual business revenues. Measuring business revenue allows us to sketch a picture of the business performance and potential in a region. The Table below shows the percentage of businesses across different revenue intervals for all sites:

Table 7: **Business Revenue**

| Sites | Type of Site | Less than 50,000 PKR | 50,000 – 100,000 PKR | 100,000-200,000 PKR | 200,000-300,000 PKR | 300,000-500,000 PKR | 500,000 and above PKR |
|---|---|---|---|---|---|---|---|
| **Derawar Fort- Bahawalpur** | Fort | 30 | 30 | 40 | 0 | 0 | 0 |
| **Shrine of Hazrat Syed Ahmed Sultan Sakhi Sarwar – DG Khan** | Religious | 0 | 38 | 27 | 13 | 15 | 7 |
| **Rohtas Fort – Jhelum** | Fort | 75 | 25 | 0 | 0 | 0 | 0 |
| **Tomb of Shah Rukn-e-Alam – Multan** | Religious | 16 | 33 | 29 | 8 | 2 | 12 |
| **Tomb of Shams Tabriz – Multan** | Religious | 2 | 26 | 22 | 30 | 14 | 6 |
| **Tomb of Mai Mahraban – Multan** | Religious | 10 | 36 | 36 | 8 | 4 | 6 |
| **Shrine of Hazrat Baba Haji Sher Dewan Chawli Mashaikh – Vehari** | Religious | 14 | 30 | 46 | 2 | 4 | 4 |
| **Shrine Sakhi Saiden Shah Shirazi in Choa Saiden Shah – Chakwal** | Religious | 51 | 28 | 21 | 0 | 0 | 0 |
| **Sultan Baho Shrine – Jhang** | Religious | 0 | 35 | 28 | 32 | 3 | 2 |
| **Fort Munro – DG Khan** | Fort | 0 | 28 | 24 | 22 | 10 | 16 |
| **Jahangir/Noor Jahan Tomb-Lahore** | Shrine | 3 | 3 | 21 | 38 | 36 | 0 |
| **Harappa- Sahiwal** | Archaeology | 4 | 4 | 10 | 12 | 28 | 42 |
| **Kalabagh – Mianwali** | Adventure/Sports | 0 | 30 | 35 | 21 | 11 | 4 |
| **Sadiq Garh Palace/Noor Palace – Bahawalpur** | Monument | 44 | 33 | 11 | 11 | 0 | 0 |
| **Cholistan Desert – Bahawalpur** | Adventure/Sports | 95 | 0 | 5 | 0 | 0 | 0 |
| **Thal Desert Mankera-Bhakkar** | Adventure/Sports | 7 | 17 | 22 | 15 | 22 | 17 |
| **Khanpur Dam- Haripur** | Adventure/Sports | 96 | 4 | 0 | 0 | 0 | 0 |
| **Jallo Park – Lahore** | Adventure/Sports | 5 | 5 | 21 | 26 | 44 | 0 |
| **Shrine & Mosque Hazrat Makhdum Jahaniyan Jahangasht – Bahawalpur** | Religious | 97 | 3 | 0 | 0 | 0 | 0 |
| **Raja Man Sing Haveli – Jehlum** | Monument | 20 | 60 | 20 | 0 | 0 | 0 |
| **Hiran Minar – Sheikhupura** | Archaeology | 0 | 0 | 21 | 41 | 38 | 0 |
| **Lal Suhanra National Park – Bahawalpur** | Adventure/Sports | 32 | 61 | 7 | 0 | 0 | 0 |
| **Khabeki Lake – Khushab** | Adventure/Sports | 2 | 38 | 34 | 14 | 10 | 2 |

For most sites, the majority of businesses are generating low revenues. A very high proportion of businesses across all sites reported earning less than PKR 200,000 in annual revenues. This indicates that the current businesses can be classified as small and micro in terms of their revenue generation activities. This data can also be classified and reviewed from a site category perspective. The Figure below shows this distribution:

Fig. 8:

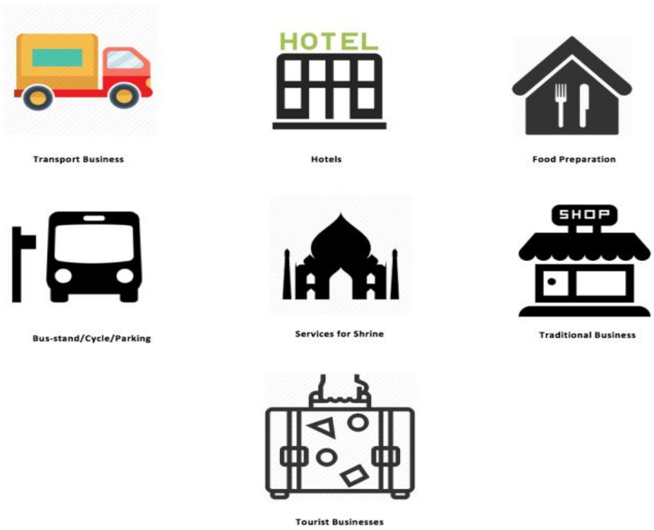



Disaggregated by site category, the results indicate that a significant proportion of businesses generate up to PKR 200,000 revenues per year. The clear exception is archaeological sites, where most businesses earn PKR 300,000-500,000. Businesses around adventure and sports sites have a more even distribution in total revenue generation. Fort-based tourist sites generate the least amount of revenues. Across the board, most businesses listed in this study generate low revenue levels.

## Types of Businesses:

Another important indicator measured in the business listing exercise was around mapping the types of businesses. The following business categories were included in the study:

Fig. 9:




These indicators are described below:

- **Transportation Related Businesses:** Businesses that provide transportation to and from, and around the tourist sites.

- **Food Vendors**: Businesses that prepare food for visitors around tourist sites e.g. tea stall / fruit and vegetable vendor.

- **Food Vendors/Restaurants**: Businesses that provide food to tourists around the sites.

- **Hotels / Motels:** Businesses that provide accommodation services to tourists.

- **Services at sites:** Businesses that provide direct services at sites e.g. washroom / guides

- **Local Businesses serving tourists:** Businesses that provide services to visitors e.g. grocery store etc.

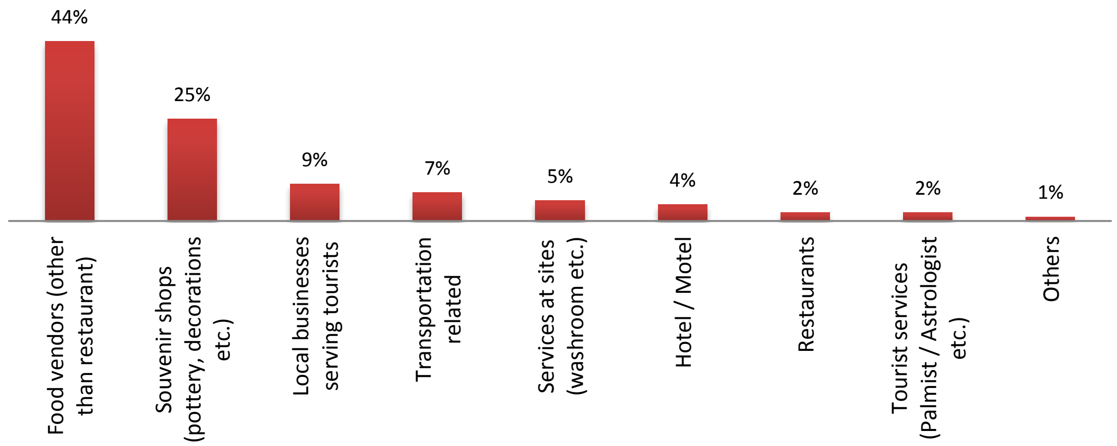
- **Souvenir Shops:** Businesses that sell traditional goods and services around tourist destinations.

- **Tourist Services:** Businesses that provide direct services to tourists visiting destinations e.g. Palmist / Astrologists.

- **Other:** Miscellaneous businesses.

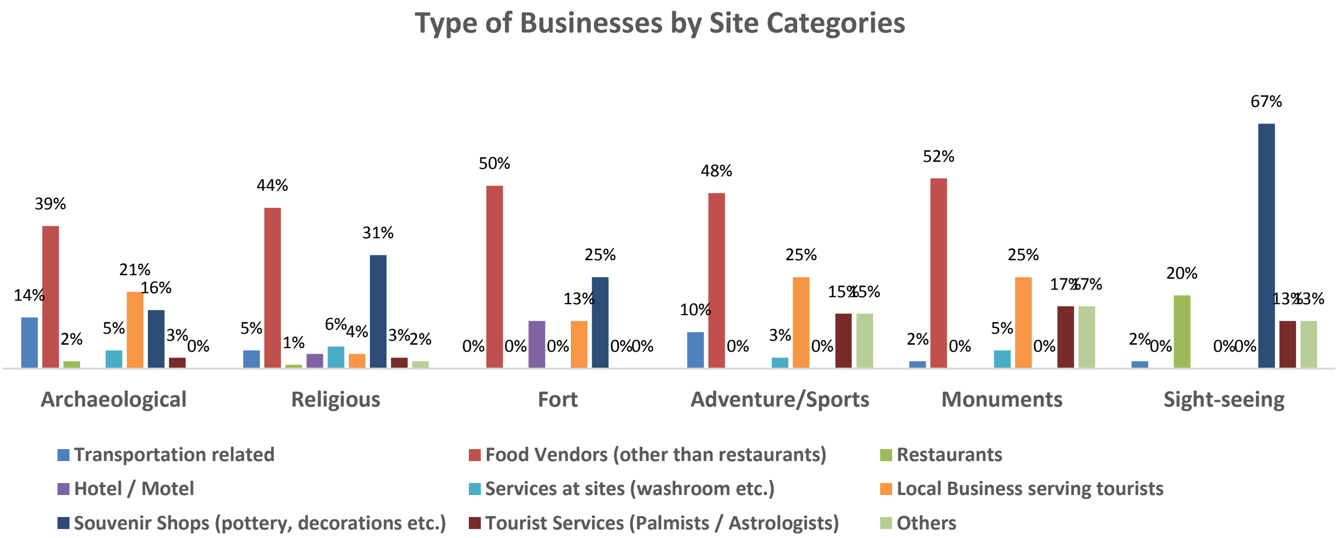
This typology covers an extensive range of businesses listed in this study. Overall results on business types are shown in the Figure below:

Fig. 10:




As seen here, the most common types of businesses are food vendors and souvenir shops. This finding indicates that for the sites covered in this study, businesses tend to be concentrated around these two types of products and services, which is indicative of customer demand. A small proportion of businesses are engaged in providing transportation services for tourists. Around 1 percent of all listed businesses were offering miscellaneous products and services. The Figure below shows types of businesses by site categories:

Fig. 11:




Types of businesses by site category vary significantly. As discussed above, food vendors are the most common type of listed business recorded for this study. Souvenir shops (traditional businesses – operations that sell traditional products and services) are the second most common type of businesses recorded.

## Number of Branches and Outlets:

Another indicator included in this study examined the number of branches or outlets operated by each listed business. This indicator is a proxy for understanding the scale of operations at tourist businesses. By mapping the number of outlets operated by businesses, the network size can also reveal the ability of businesses to exploit multiple verticals demanded by tourists.

On average, the business listing exercise reveals that almost **all businesses are operating a single enterprise**. The highest number of branch locations – 4 – was reported at the Tomb of Mai Maharban in Multan. These findings show that businesses around these sites have limited, small-scale operations.

## Physical Area:

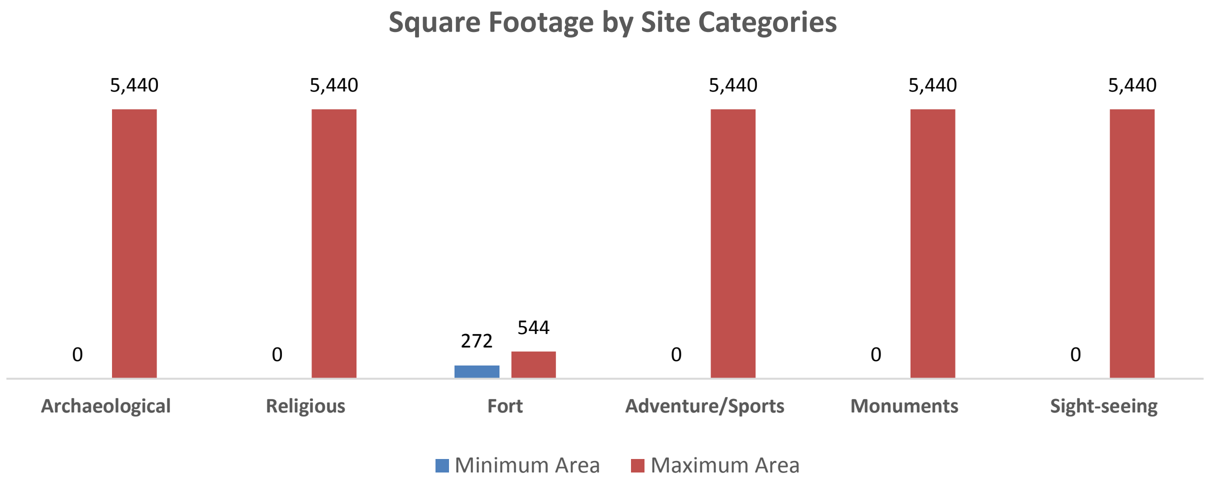
This study also includes data on the physical area of each business listed in square footage terms. In general, the physical area occupied by a business can reveal the range of operations. Larger space occupation can indicate that a given business is offering a diverse range of products and services to its customers, across multiple verticals. The Table below shows the minimum and maximum square footage area occupied by businesses around each site.

Table 8: **Physical Area**

| Sites | Type of Site | Minimum Area (Sq. Feet) | Maximum Area (Sq. Feet) |
|---|---|---|---|
| **Derawar Fort- Bahawalpur** | Fort | 25 | 255 |
| **Shrine of Hazrat Syed Ahmed Sultan Sakhi Sarwar – DG Khan** | Religious | 0 | 5,440 |
| **Rohtas Fort – Jhelum** | Fort | 272 | 544 |
| **Tomb of Shah Rukn-e-Alam – Multan** | Religious | 0 | 700 |
| **Tomb of Shams Tabriz – Multan** | Religious | 0 | 1,088 |
| **Tomb of Mai Mahraban – Multan** | Religious | 0 | 1,200 |
| **Shrine of Hazrat Baba Haji Sher Dewan Chawli Mashaikh – Vehari** | Religious | 0 | 1,088 |
| **Shrine Sakhi Saiden Shah Shirazi in Choa Saiden Shah – Chakwal** | Religious | 0 | 600 |
| **Sultan Baho Shrine – Jhang** | Religious | 0 | 1,200 |
| **Fort Munro – DG Khan** | Fort | 0 | 5,440 |
| **Jahangir/Noor Jahan Tomb- Lahore** | Shrine | 0 | 396 |
| **Harappa- Sahiwal** | Archaeology | 0 | 5,440 |
| **Kalabagh – Mianwali** | Adventure/Sports | 0 | 1,904 |
| **Sadiq Garh Palace/Noor Palace – Bahawalpur** | Monument | 0 | 300 |
| **Cholistan Desert – Bahawalpur** | Adventure/Sports | 0 | 150 |
| **Thal Desert Mankera- Bhakkar** | Adventure/Sports | 0 | 5,440 |
| **Khanpur Dam- Haripur** | Adventure/Sports | 42 | 272 |
| **Jallo Park – Lahore** | Adventure/Sports | 0 | 340 |
| **Shrine & Mosque Hazrat Makhdum Jahaniyan Jahangasht – Bahawalpur** | Religious | 15 | 120 |
| **Raja Man Sing Haveli – Jehlum** | Monument | 100 | 120 |
| **Hiran Minar – Sheikhupura** | Archaeology | 0 | 720 |
| **Lal Suhanra National Park – Bahawalpur** | Adventure/Sports | 0 | 2,720 |
| **Khabeki Lake – Khushab** | Adventure/Sports | 0 | 4,080 |

These numbers indicate that by and large, most businesses around the sites chosen for this study occupy a limited area. The same data is visualized by site category below:

Fig. 12:




As seen here, almost all site categories, with the exception of forts, have a fairly small space occupation. This data must be read carefully. The small physical size of businesses does not in and of itself reveal the potential of businesses. Small-scale businesses can generate high revenues and service high customer volumes. Two possible interpretations can be gleaned from this data. First, the nature of customer demand might require small-scale operations around these sites. Alternatively, businesses in the immediate vicinity of tourist destinations could be hampered by high commercial rents.

However, when read together and contextualized with the preceding data in this Chapter, it becomes evident that most businesses around chosen sites are small scale: they have limited revenue turnover and are operating only a single enterprise. More clarity on the scale and potential of businesses around these sites will become evident in the discussion of data in the subsequent sections and chapters.

**Employment Status: Full-time/Part-time, Gender & Age:**

This study also gathered data on the employment status of employees working at each business around the selected sites. Specifically, the data captured the full-time/part-time status of employees at listed businesses, their gender, and age groups. These results help arrive at three findings. First, it alludes to the scale and intensity of operations. A higher number of employees indicate that business is servicing a high volume of customers; or that it offers multiple products and services that require a larger workforce. Second, the data also reveals the gender distribution of employees at the listed businesses. This distribution provides a window into the labour force participation rates of men and women in tourist businesses around destinations.

Third the data reveals whether young workers are involved in the tourist industry at selected locations.

The Tables below shows the number of full-time/part-time, male and female employees, and their ages at each site included in the study:

Table 9: **Employment Status: Full Time**

| Sites | Type of Site | Male Full-time Up to 18 Years | | Male Full-time 19-25 Years | | Male Full-time 26-50 Years | | Male Full-time 50+ Years | | Male Full-time Total | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Min | Max | Min | Max | Min | Max | Min | Max | Min | Max |
| **Derawar Fort- Bahawalpur** | Fort | | | 1 | 2 | 1 | 2 | 1 | 1 | 1 | 3 |
| **Shrine of Hazrat Syed Ahmed Sultan Sakhi Sarwar – DG Khan** | Religious | 1 | 2 | 1 | 1 | 1 | 2 | 1 | 1 | 1 | 4 |
| **Rohtas Fort – Jhelum** | Fort | | | 1 | 1 | 1 | 1 | | | 1 | 1 |
| **Tomb of Shah Rukn-e-Alam – Multan** | Religious | 1 | 1 | 1 | 1 | 1 | 4 | 1 | 1 | 1 | 4 |
| **Tomb of Shams Tabriz – Multan** | Religious | 1 | 1 | 1 | 2 | 1 | 2 | 1 | 2 | 1 | 5 |
| **Tomb of Mai Mahraban – Multan** | Religious | 1 | 1 | 1 | 2 | 1 | 1 | 1 | 1 | 1 | 5 |
| **Shrine of Hazrat Baba Haji Sher Dewan Chawli Mashaikh – Vehari** | Religious | 1 | 2 | 1 | 3 | 1 | 3 | 1 | 2 | 1 | 6 |
| **Shrine Sakhi Saiden Shah Shirazi in Choa Saiden Shah – Chakwal** | Religious | | | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 2 |
| **Sultan Baho Shrine – Jhang** | Religious | | | 1 | 2 | 1 | 3 | 1 | 1 | 1 | 4 |
| **Fort Munro – DG Khan** | Fort | 1 | 1 | 1 | 2 | 1 | 2 | 1 | 2 | 1 | 6 |
| **Jahangir/Noor Jahan Tomb- Lahore** | Shrine | 1 | 1 | 1 | 2 | 1 | 2 | 1 | 1 | 1 | 3 |
| **Harappa- Sahiwal** | Archaeology | 1 | 2 | 1 | 3 | 1 | 2 | 1 | 1 | 1 | 4 |
| **Kalabagh – Mianwali** | Adventure/Sports | 1 | 2 | 1 | 2 | 1 | 2 | 1 | 2 | 1 | 6 |
| **Sadiq Garh Palace/Noor Palace – Bahawalpur** | Monument | | | 1 | 1 | 1 | 1 | | | 1 | 1 |
| **Cholistan Desert – Bahawalpur** | Adventure/Sports | | | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| **Thal Desert Mankera-Bhakkar** | Adventure/Sports | 1 | 1 | 1 | 3 | 1 | 3 | 1 | 2 | 1 | 5 |
| **Khanpur Dam- Haripur** | Adventure/Sports | | | | | 1 | 3 | | | 1 | 3 |
| **Jallo Park – Lahore** | Adventure/Sports | 1 | 1 | 1 | 2 | 1 | 2 | 1 | 1 | 1 | 4 |
| **Shrine & Mosque Hazrat Makhdum Jahaniyan Jahangasht – Bahawalpur** | Religious | | | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 2 |
| **Raja Man Sing Haveli – Jehlum** | Monument | | | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| **Hiran Minar – Sheikhupura** | Archaeology | 1 | 1 | 1 | 2 | 1 | 1 | | | 1 | 3 |
| **Lal Suhanra National Park – Bahawalpur** | Adventure/Sports | 1 | 1 | 1 | 2 | 1 | 2 | | | 1 | 4 |
| **Khabeki Lake – Khushab** | Adventure/Sports | | | 1 | 5 | 1 | 4 | 1 | 1 | 1 | 10 |

Table 10: **Employment Status: Part Time**

| Sites | Type of Site | Male Part-time Up to 18 Years | | Male part-time 19-25 Years | | Male Part-time 26-50 Years | | Male Part-time 50+ Years | | Male Part-time Total | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Min | Max | Min | Max | Min | Max | Min | Max | Min | Max |
| **Derawar Fort-Bahawalpur** | Fort | | | | | | | | | | |
| **Shrine of Hazrat Syed Ahmed Sultan Sakhi Sarwar – DG Khan** | Religious | 1 | 1 | 1 | 2 | 1 | 1 | | | 1 | 3 |
| **Rohtas Fort – Jhelum** | Fort | | | | | | | | | | |
| **Tomb of Shah Rukn-e-Alam – Multan** | Religious | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 3 | 1 | 2 |
| **Tomb of Shams Tabriz – Multan** | Religious | | | 1 | 1 | 1 | 1 | | | 1 | 1 |
| **Tomb of Mai Mahraban – Multan** | Religious | 1 | 1 | 1 | 1 | 1 | 1 | | | 1 | 2 |
| **Shrine of Hazrat Baba Haji Sher Dewan Chawli Mashaikh – Vehari** | Religious | | | | | | | 1 | 1 | 1 | 1 |
| **Shrine Sakhi Saiden Shah Shirazi in Choa Saiden Shah – Chakwal** | Religious | | | | | | | | | | |
| **Sultan Baho Shrine – Jhang** | Religious | | | | | | | | | | |
| **Fort Munro – DG Khan** | Fort | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| **Jahangir/Noor Jahan Tomb- Lahore** | Shrine | | | | | | | | | | |
| **Harappa- Sahiwal** | Archaeology | | | | | | | | | | |
| **Kalabagh – Mianwali** | Adventure/Sports | 1 | 1 | 1 | 2 | 2 | 2 | 1 | 2 | 1 | 5 |
| **Sadiq Garh Palace/Noor Palace – Bahawalpur** | Monument | | | | | | | | | | |
| **Cholistan Desert – Bahawalpur** | Adventure/Sports | | | | | 1 | 1 | | | 1 | 1 |
| **Thal Desert Mankera-Bhakkar** | Adventure/Sports | | | 1 | 1 | 1 | 2 | | | 1 | 2 |
| **Khanpur Dam- Haripur** | Adventure/Sports | | | | | | | | | | |
| **Jallo Park – Lahore** | Adventure/Sports | | | | | | | | | | |
| **Shrine & Mosque Hazrat Makhdum Jahaniyan Jahangasht – Bahawalpur** | Religious | | | | | | | | | | |
| **Raja Man Sing Haveli – Jehlum** | Monument | | | | | | | | | | |
| **Hiran Minar – Sheikhupura** | Archaeology | | | | | | | | | | |
| **Lal Suhanra National Park – Bahawalpur** | Adventure/Sports | | | | | | | | | | |
| **Khabeki Lake – Khushab** | Adventure/Sports | | | 1 | 2 | 1 | 2 | 1 | 2 | 1 | 5 |

This data reveals the following:

- Most male employees currently employed in the businesses around the selected sites are working full-time, as opposed to part-time work.
- The majority of employees are between the ages of 19 and 50 years. This reveals that youth are getting employment opportunities in touristic businesses. However, given the small-scale of these businesses, the total employment levels are currently low for listed businesses.
- Most businesses employ a low number of full-time employees across the board. The highest number of employees – 10, was employed at Khabeki Lake in Khushab.
- Employment opportunities in listed businesses around the selected sites are limited. This further reinforces the finding that the most businesses around these sites are operating at limited scales.

## Female Workers:

Data on female employment in listed businesses in this study shows that very few women, of any age, are currently employed in the businesses. Moreover, no women were employed as part-time workers in any of the listed businesses. Businesses at only two sites reportedly employed full-time female employees, as shown in the Table below:

Table 11: **Female Workers**

| Sites | Type of Site | Female full-time Up to 18 Years | | Female full-time 19-25 Years | | Female full-time 26-50 Years | | Female full-time 50+ Years | | Female full-time Total | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Min | Max | Min | Max | Min | Max | Min | Max | Min | Max |
| **Shrine of Hazrat Syed Ahmed Sultan Sakhi Sarwar – DG Khan** | Religious | | | | | 1 | 1 | | | 1 | 1 |
| **Kalabagh – Mianwali** | Adventure/Sports | | | 2 | 2 | 1 | 1 | 1 | 1 | 4 | 4 |

Businesses around these two sites buck the overall trend. For example, businesses operating around the adventure/sports sites in Kalabagh employ women aged between 19 to above 50 years. This could be indicative of the nature of products and services offered by these businesses, as well as demand generated by female customers.

The lack of women employees in businesses around these sites accords with the general labour force structure in Pakistan. Women across the country are principally employed in the domestic household economy. Overall, women's labour force participation rates are around 25 percent in Pakistan, which is well below countries at comparable income levels.[23] Results from this study show that businesses around local and regional tourist destinations in Punjab do not employ women.

**Respondent Status & Quality of Response:**

Data from the business listing module also identified respondents by their status within the business i.e. owner or employee. The Figure below shows these results:

Fig. 13:


Furthermore, the quality of responses was evaluated by our technical and field teams as follows:

Fig. 14:


These results show that the most respondents engaged in the business listing module were owners of the business. Most of the responses were gauged between excellent and good. Based on these numbers, this listing data can be used and interpreted with a high degree of reliability.

[23] Asian Development Bank, "ADB Briefs – Policy Brief on Female Labour Force Participation in Pakistan", October, 2016.

**Composite Picture: Business Listings:**

The business listing module gathered extensive data on several indicators. This data can be juxtaposed to provide a composite picture of business listings around each site. These results are displayed in the Table below:

Table 12: **Composition Picture: Business Listening**

| Total Business Listings | Average Duration of Operations | Average Space Occupied | Average Revenue PKR Annual | Most common type of Businesses | Average No. of Branches | Average Male Employees | Average Female Employees |
|---|---|---|---|---|---|---|---|
| **872** | 7 Years | 198.44 ft. | 232,060 | Food Vendors/ Restaurants | 1 | 1 | Nil |

# BUSINESS PROFILES & POTENTIAL

CHAPTER 4

# CHAPTER 4:
# BUSINESS PROFILES & POTENTIAL

Business biographies reveal important, granular-level data that can help assess the structure, operations, and potential of businesses operating in an industry. This module of the study delved deeper into the business survey exercise by going beyond listings. Detailed biographical information paints a thorough picture of business entities around the area of interest.

Broadly speaking, two thematic areas were assessed in this evaluation of business activities. The first theme is built around the nature and scope of economic opportunities and estimation of the scope of business activities around selected sites. The second theme analyzes the challenges associated with operating businesses around the tourist destinations. The common thread running through these macro-level themes is a focus on the level of engagement of youth and women in tourism businesses. Cumulatively, this module helps delineate the supply-side business landscape around tourist sites.

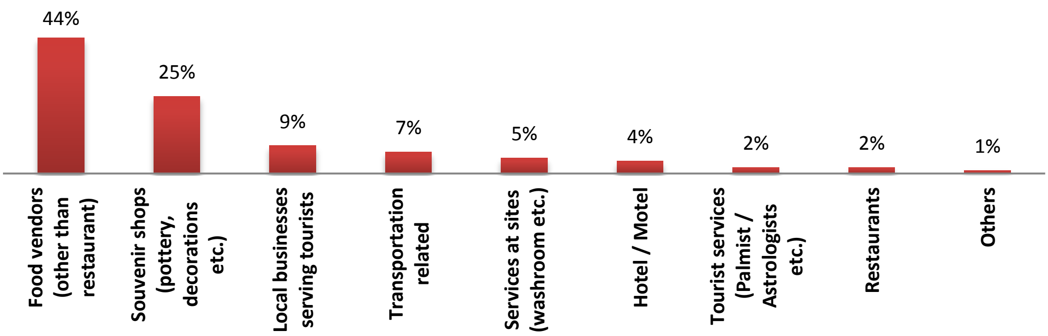
## ECONOMIC OPPORTUNITY & POTENTIAL OF BUSINESSES

Estimation of economic opportunities of businesses around the selected site was a major objective for this study. The indicators discussed below disaggregate the business structures and dynamics of listed enterprises in detail.

### Types of Businesses:

Business typology was discussed in the previous Chapter. These results are shown in the Figure below, and are a useful starting point for understanding the nature and potential of businesses:

Fig. 15:



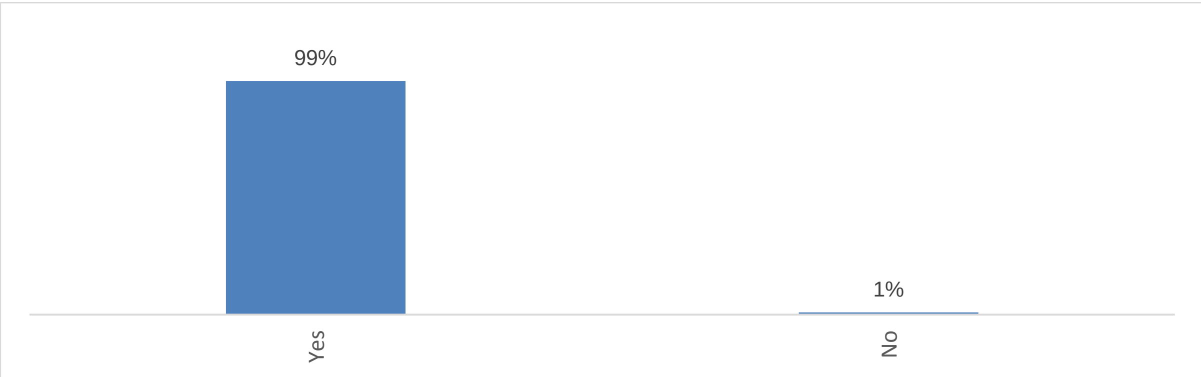

As seen here, the most common types of businesses are food vendors and souvenirs shops. This finding indicates that for the sites covered in this study, businesses tend to be concentrated around these two types of products and services, which could be indicative of customer demand. Around 2 percent of all listed businesses were offering miscellaneous products and services.

Crucially, this typology reveals that the range of services and products offered to tourists around these sites are limited. This limitation shows that the businesses are under-exploring the diverse range of service and product verticals that tourists utilize when undertaking trips.

### Association with Tourist Sites:

An important angle explored in this study was the assessment of business dependency on the tourist sites. Specifically, this dimension assesses whether businesses are operating directly to service tourist demand around sites, or whether these enterprises offer stand-alone products and services – outside the economy created by tourist sites. The Figure below shows results on this indicator:

Fig. 16:

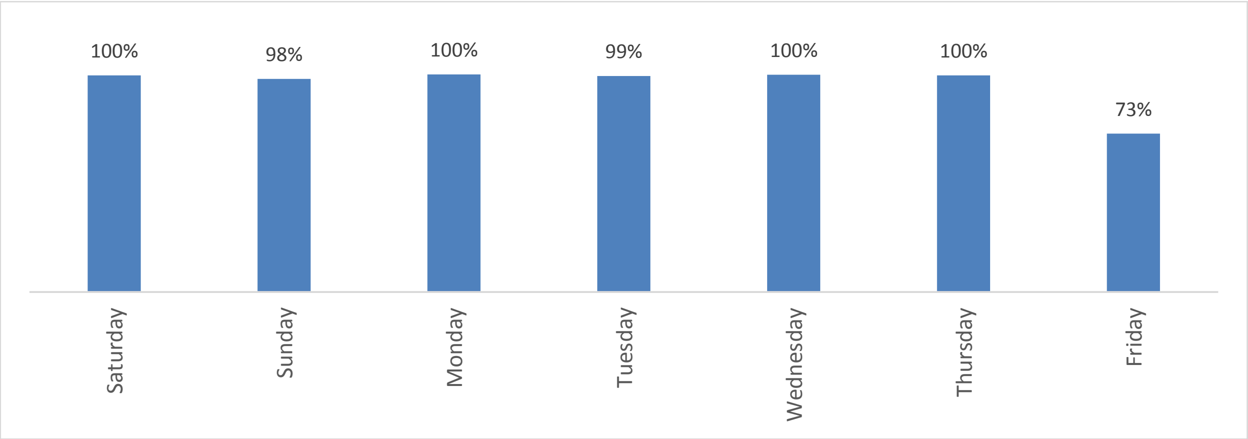



Nearly all businesses operating around the sites are directly dependent on the tourism economy generated by the sites. This implies that the data can be interpreted reliably to estimate and interpret the economic potential of all businesses listed in this study. Any changes in the economic, cultural, and physical dynamics of these sites are likely to generate a direct and significant impact on the economic health and potential of listed businesses.

### Business Operations: Days and Daily Hours:

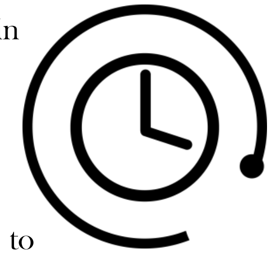
Businesses decisions on days of operations in a week, and daily schedule of operations are integral to the scale of activities. This factor also reflects demand flows and dynamics: the type of customer demand affects how businesses structure their operations and delivery of services. The Figure below shows data on this indicator:

Fig. 17:




As seen above, almost all enterprises run operations throughout a given week. The only exception is Friday: although regulations in Pakistan stipulate Friday as a full working day, many businesses choose to reduce operations to half-day, or take the day off. However, in the data collected, this variation is only partial. Nearly three-quarters of all businesses continue operations on Friday. This is especially relevant for religious sites that tend to attract a high volume of tourists on Fridays, which is a religious day in Islamic societies.

All businesses listed in this study were also asked to report their average hours of operations on any typical day. On average, listed businesses operated for approximately 9-hours every day. This daily schedule appears to be on par with businesses, and also points to the flow of customer demand around selected sites.



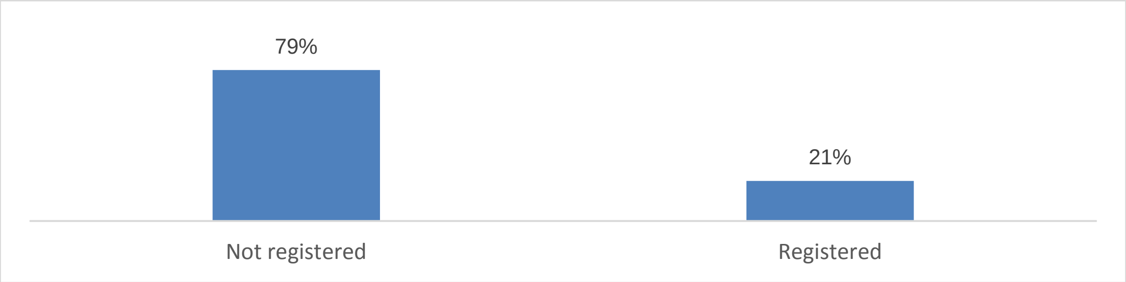
9

Average Daily Hours of Operations

## Business Status:

Two critical business status dimensions were included in this study: business registration status and ownership arrangements. Registration records indicate whether a given enterprise has formalized its activities, and is included in the formal economy. The Figure below shows the registration status of businesses listed in this exercise.

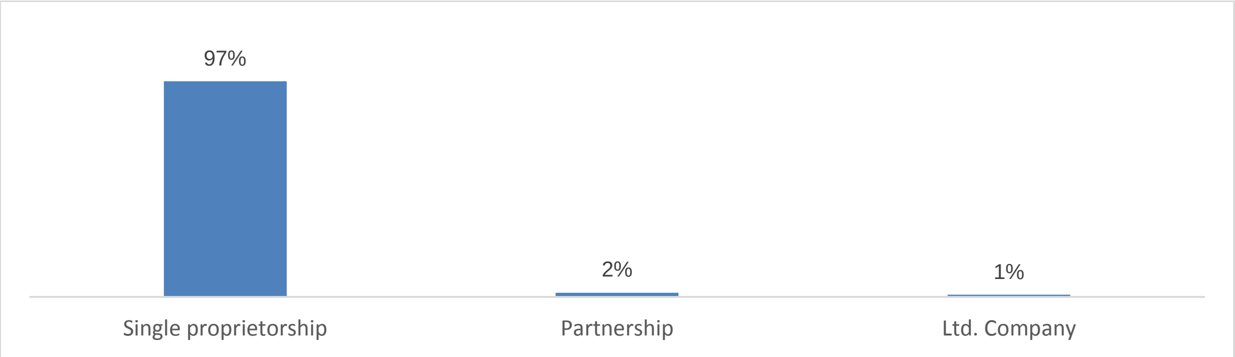
Fig. 18:




These results are in line with the general business environment in Pakistan. According to the State Bank of Pakistan's macroeconomic, monetary-estimates, nearly 20-30 percent of the national economy operates in the informal sector.[24] This is especially true for micro and small-enterprises that remain unregistered, and operate informally. From an economic perspective, informal business operations keep enterprises outside the margins of economic and business policies, and restrict them from obtaining formal assistance and resources for business development. The finding here suggests that nearly four in every five businesses listed in the study are operating without formal registration, which is line with the overall finding that most businesses around the sites are small-scale.

As a corollary, the study also asked respondents to indicate the management and ownership status of their businesses. The results are shown in the Figure below:

Fig. 19:




These numbers lend further credence to the small-scale nature of businesses around the twenty-three sites covered in the study. 97 percent of all listed businesses are sole proprietorships around selected tourist destinations. This implies that most operations have single-owners, and are running small-scale operations. Furthermore, this finding also impacts the potential for businesses: single-owner enterprises have limited ability to raise large sums of capital investments, and are usually able to employ fewer workers.

[24] State Bank of Pakistan, "The Size of the Informal Economy in Pakistan", SBP Working Series no.33, 2010. http://www.sbp.org.pk/repec/sbp/wpaper/wp33.pdf

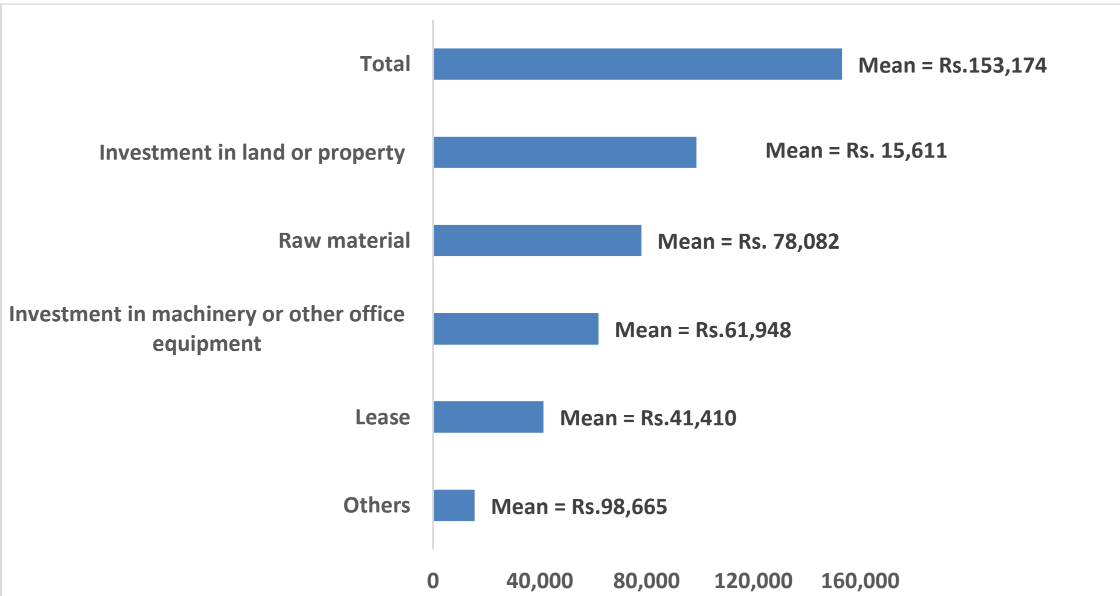
## Investments, Revenues, and Income:

A key component of business potential estimation and mapping the scale of activities is the measurement of total investments in the enterprise, as well as data on revenue generation and business incomes. This study collected survey data from businesses on all three aspects of their businesses. Based on these numbers, a number of crucial deductions can be made regarding the business size and potential of listed enterprises.

### Investments

Businesses listed in this study were requested to indicate the level of investment that had been made in their businesses. These investments were broken down into five distinct categories: land and property; business lease; capital investment; raw materials; and miscellaneous categories. Average investment data on these dimensions are shown below:

Fig. 20:




As seen here, the average total investment made by listed businesses in their operations was recorded at PKR 153,174. In accordance with the overall findings in this study, this is a low level of investment made by owners in the listed enterprises. The highest investment was made in land or property, which amounted to an average of PKR 98,665 for all listed businesses.

**PKR 153,174**
Average Business Investment

Businesses are investing the least amount in their business lease/licensing activities with an average of PKR 41,410. Given that around three-quarters of all businesses are operating informally, without registrations, this finding fits the emerging picture. Raw materials or inventory investments absorb the second highest

**PKR 497.2**
Average investment per sq. foot

levels of average business investments at PKR 78,082. This might indicate that businesses around these sites tend to purchase inventory/stock just-in-time to service customer demand, and most likely do not have the physical infrastructure or incentives to build up inventory. In total, all listed businesses have invested more than PKR 1 billion in their businesses.

**Revenues:**

Revenue data was analyzed at the aggregate level, to indicate the total average annual revenues generated by all businesses. This data was acquired for disaggregated streams: average revenue on typical day; an off day; and, on special-event days. The results are shown in the Figures below:

Fig. 21:

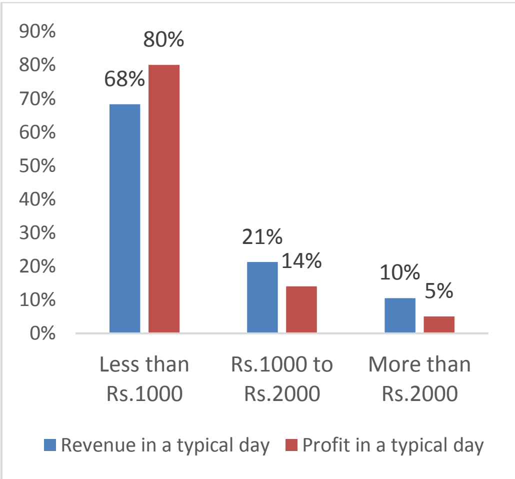



Fig. 22:

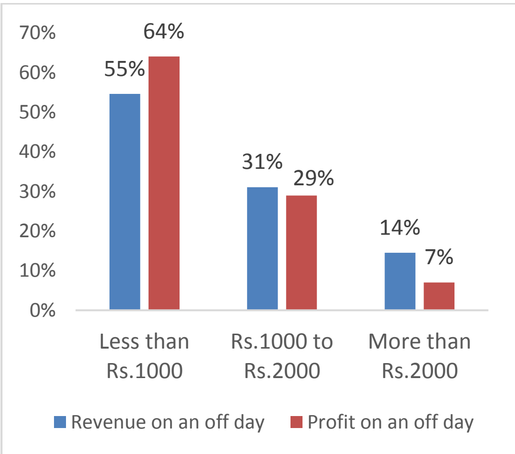
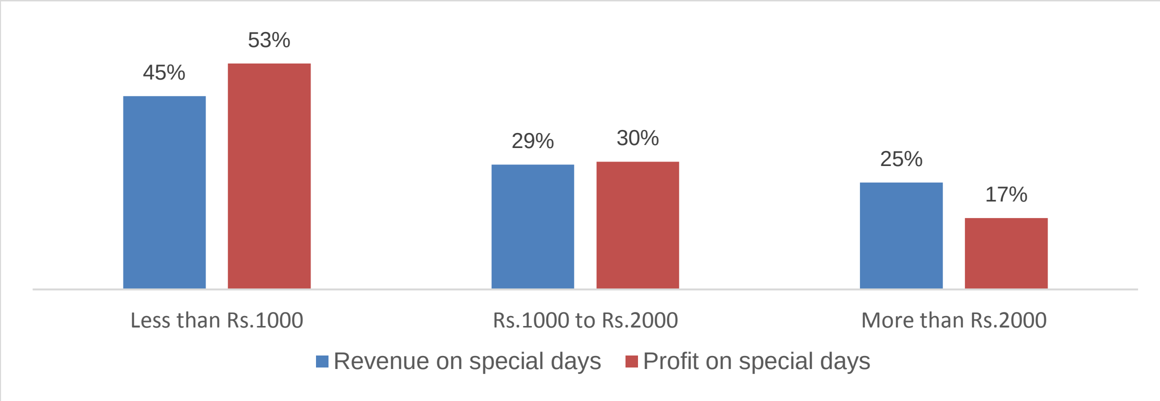


Fig. 23:




These numbers reveal on the cash flow and profitability aspects of listed businesses. Across all three disaggregated events, most businesses earn less than PKR 1,000 in their daily operations. This fits with the previously discussed finding that the listed businesses are small-scale, with limited investments, revenues, profitability, and employment-generation potential. On typical days, these businesses tend to be most profitable at lower revenue levels. Higher revenues on typical and off-days tend to decrease profits. This could be because these businesses are likely inefficient and not operating at scale. Increasing revenue streams tend to inflate costs for the businesses, and earning profits becomes more difficult.

Special events around the tourist sites tend to change the dynamics. More businesses experience a bump in revenues, and tend to become slightly more profitable. This could indicate that the listed businesses invest in efficiency gains (employee-capital ratio, raw-materials, turnover, operations etc.) on and around special events and tend to earn higher revenues and profits. However, at more than PKR 2,000 per day revenue streams, businesses tend to make fewer profits on any given day of the year.

## Special Events:

Special events are an integral component of the business cycles and economies built around tourist sites. Event-based tourism provides significant fillip to the local economy. According to OECD, one-off or cyclical special events can expand visitor economy, increase business revenues and profitability, promote regional development, stimulate the upgrading of infrastructure and capital, create jobs, and open up new avenues of economic partnerships.[25] This indicates that the occurrence of special events and their duration likely has a positive net economic impact on businesses around the sites covered in this study. Results on these indicators are shown in the Figures below:

[25] OECD, "Major Events as a Catalyst for Tourism Development", *OECD Tourism Papers*, 2017.

Fig. 24:

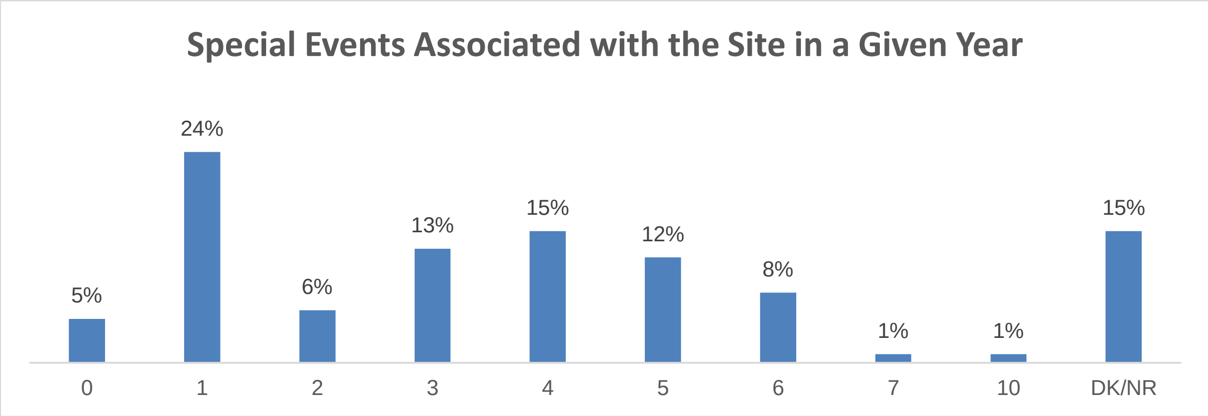
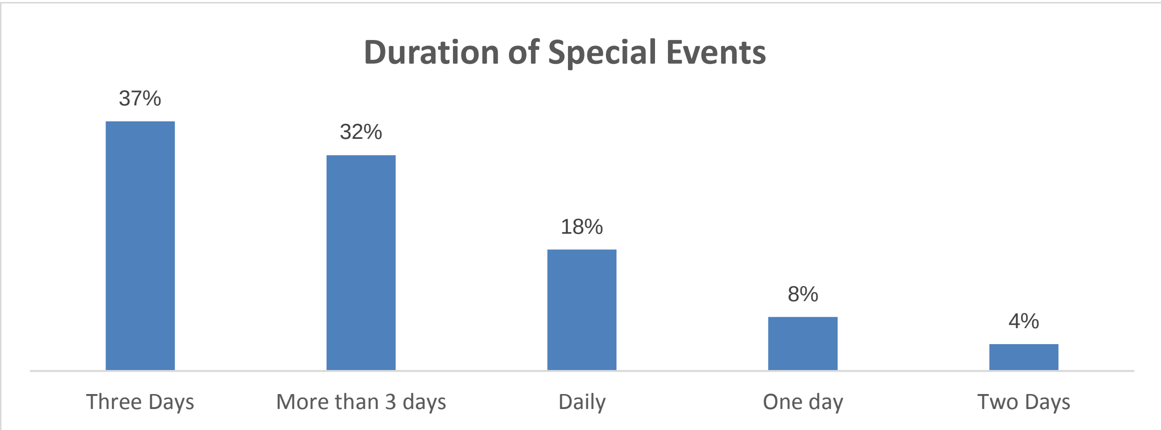



Fig. 25:




This data shows that special events e.g. festivals, Urs etc. are a regular occurrence at most sites. Almost a quarter of all businesses report at least one special event that is organized at the tourist sites. Another 39 percent of all businesses indicate that between 3 and 5 special events are associated with their sites. 37 percent all businesses reported that these special events last from around three days to more than three days (32 percent).

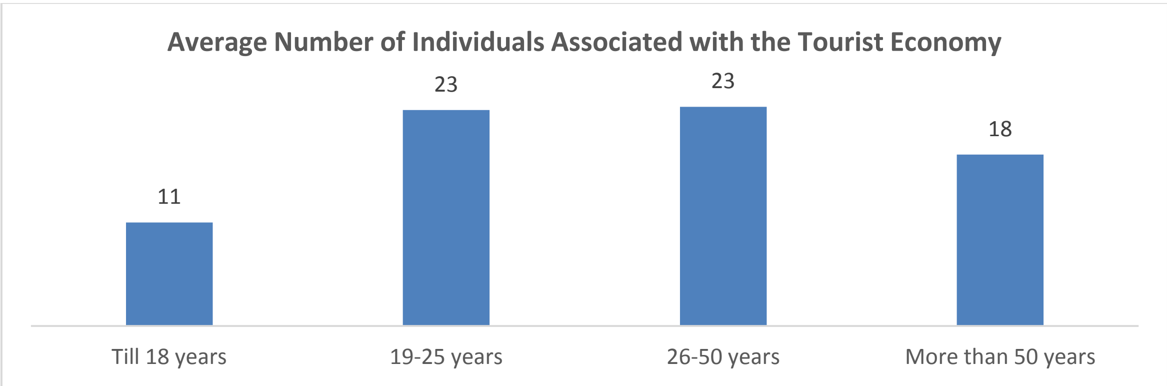
18 percent of all businesses reported that special events were a daily occurrence. This occurrence rate would be natural for religious sites that tend to organize daily and weekly special religious and spiritual events associated with shrines and tombs. Cumulatively, this data can be linked to revenue generation discussed previously to indicate that most businesses experience an increase in revenues around special event days associated with their surrounding tourist destination.

## Industry Employment, Incomes, and Gender:

This study also asked business respondents to provide estimated intelligence on the state of employment, labour income, and gender distribution in their industry. Given that these businesses are directly associated with tourism, and are operating in a tourism-based economy, these estimates provide a window into the state of industrial employment around these sites. The study gathered this intelligence on age structure of individuals associated with tourist businesses, income estimations of individuals associated with the tourist economy, female employment in the tourist economy, and employment status of youth in the region. Each of these dimensions is discussed below:

Respondents were asked to indicate the number of people associated with the tourist economy around the sites they were currently associated with. Data from this query are shown below:

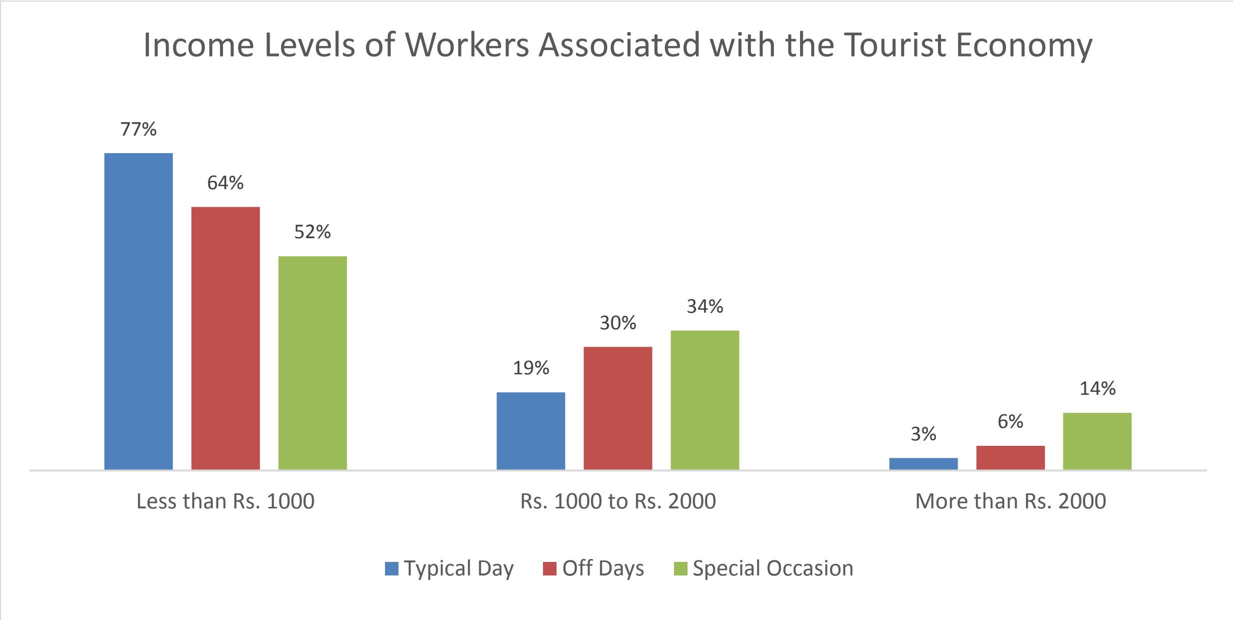
Fig. 26:




Most respondents estimated that on average around 67 people were working in professions associated with their businesses in their city.

Respondents were asked by the research team to estimate the income levels of other individuals associated with the tourist economy on different days. The figure below provides these estimates:

Fig. 27:




This data can be juxtaposed with the previous sections. All businesses reported earning an average of less than PKR 1,000 on an average day. Respondents projected the same income estimations to other businesses and workers associated with the industry. As seen above, the majority of workers associated with the tourist economy earn low incomes on any given day of the year. However, the income levels go up slightly on special-event days associated with the sites. Overall, this fits with the finding that the businesses operating in the economy around the sites are small-scale and micro-enterprises, with low revenue and employment generation performance.

Since most of the respondents engaged in this study were business owners, they likely have valuable and reliable insight and information on the employment status of women and youth in the overall regional economy. To extract this information, respondents were asked to report their estimations of the average number of women and youth working in different industries. The results are shown in the Figures below:

Fig. 28:

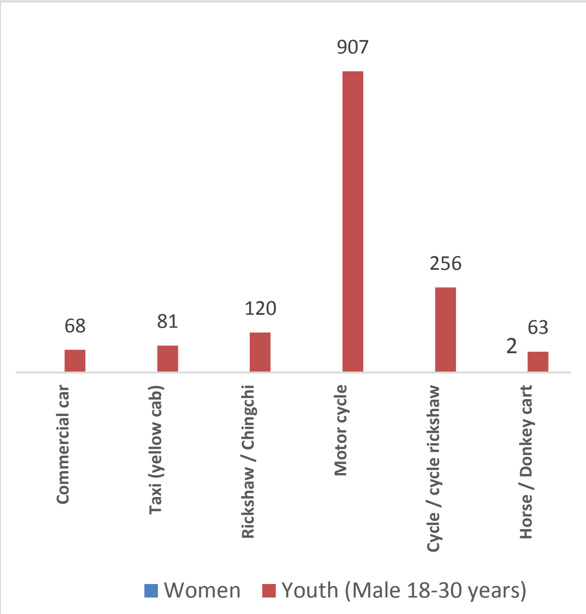



Fig. 29:

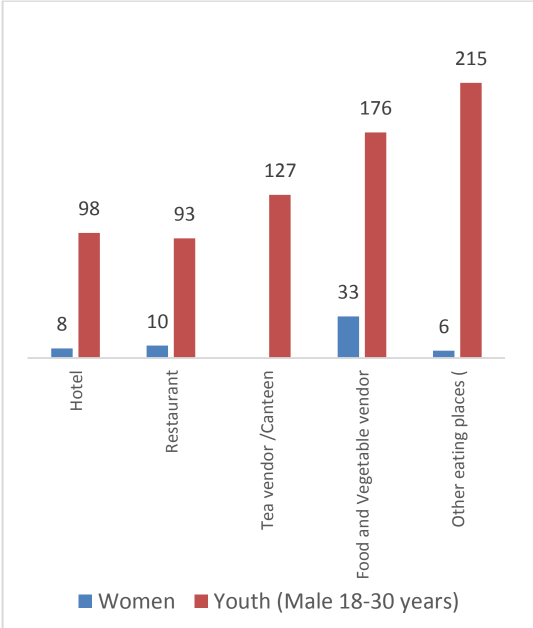



Fig. 30:

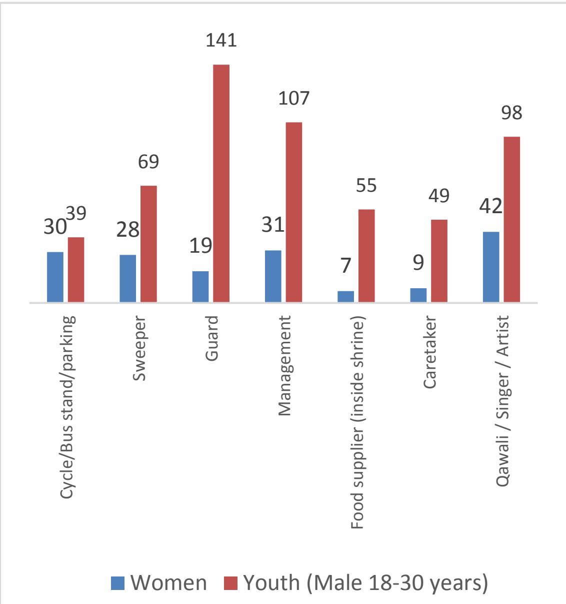



Fig. 31:

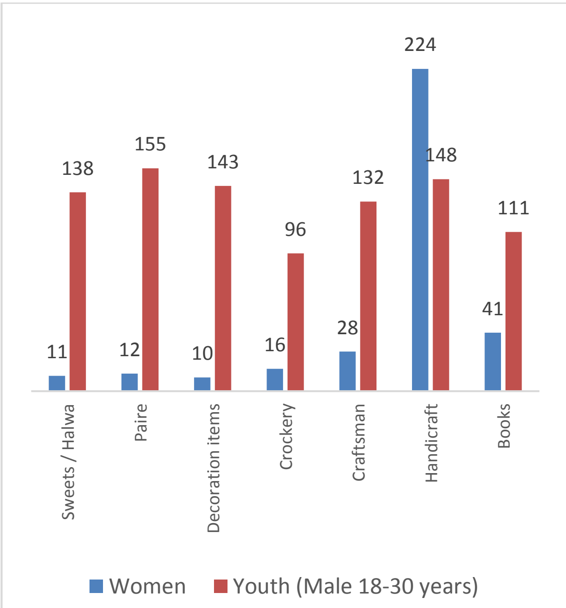
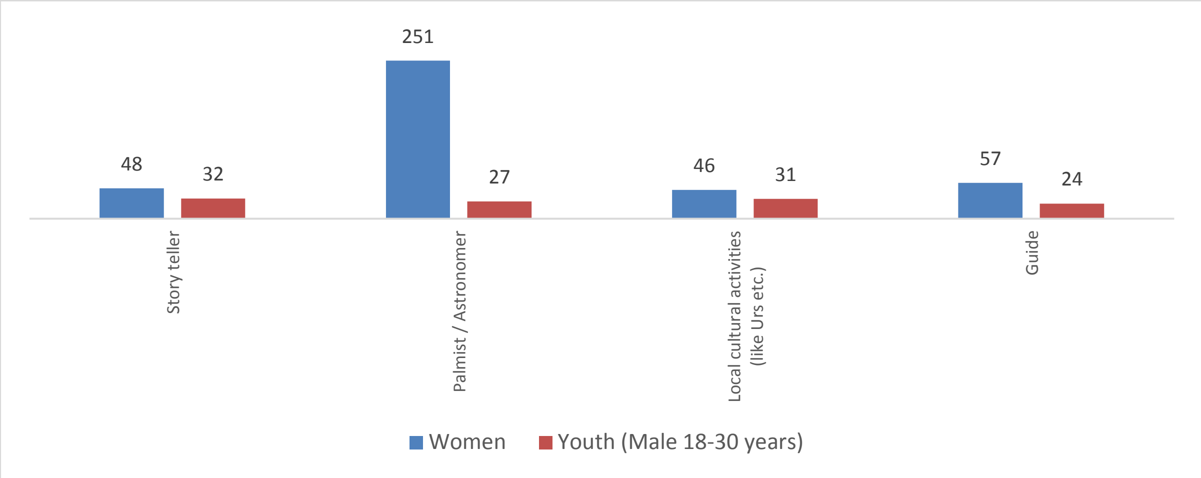


Fig. 32:



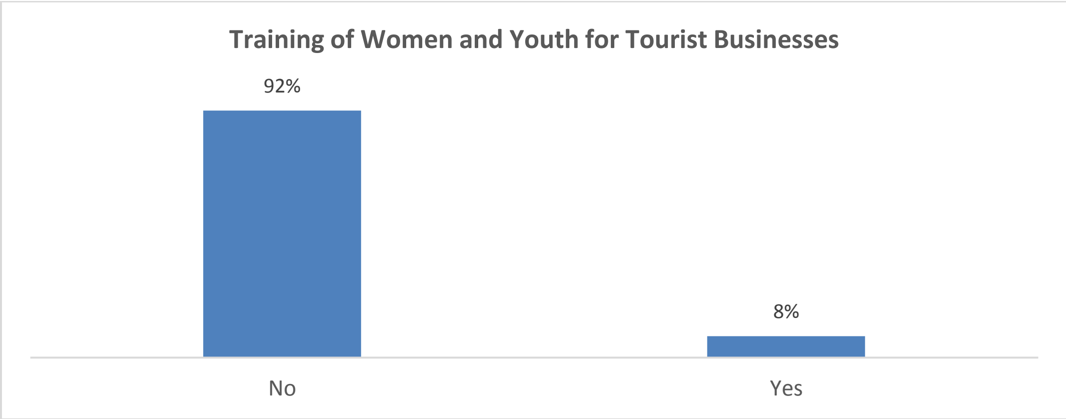

These results provide a general window into patterns of employment intensity experienced by youth and women in different industries in the respondents' local economy. As seen in this data, business owners think that the highest proportion of youth workers in the regional economy are employed in businesses associated specifically with motorbikes e.g. selling, repairing, and servicing motorbikes. Other significant employment generating industries include restaurant and food places, security services (guards), and businesses associated with decorative items.

Across the board, and in line with the employment patterns in the tourist economy, most business owners reported that women constitute a negligible proportion of the labour force across all industries. The most significant employment generation for women comes from handicrafts businesses (most likely manufacturing handicrafts that are sold on to wholesalers), and palmistry/astronomy. Transport and restaurant/hotel industries – also major business categories in the tourism economy- employ next to no women. As seen in the business listing data form this study (Chapter 2), women are generally absent from employment opportunities around these sites.

## Women's and Youth's Labour Force Training:

Given that the respondents come from the business community, their views and intelligence on the local economy and labour force were solicited to delve deeper into the status of employment training and associated opportunities and potential available for women and youth. Respondents were asked to indicate whether if women and youth are provided training to work in their industry:

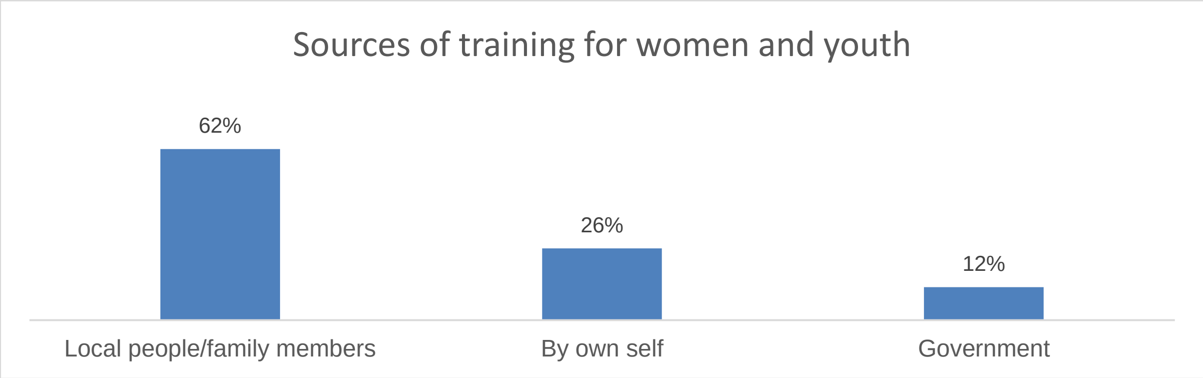
Fig. 33:




This finding shows that women and youth lack the training required for working in the tourism economy associated with the selected sites. Youth are also not formally trained to work in the tourist businesses. Generally, lack of training and skills credentials are a critical bottleneck for workers to find gainful employment in an industry. However, given the context of findings generated by this study, and the general information on Pakistan's business environment, the conventional interpretation can be tempered for both demographic groups. Firstly, women are generally locked out of the labour force and the formal economy. This is specifically true for the businesses listed in this study. Second, most businesses covered in this study are small-scale, with low revenue generation and weak profitability. This implies that most businesses employ low numbers of youth; and that they do not require formal training and skills for youth employees to work in the industry.

Following on from the skills evaluation query, respondents were asked to indicate the sources of training for the 8 percent of youth and women employees currently working in their industry. These results are shown in the Figure below:

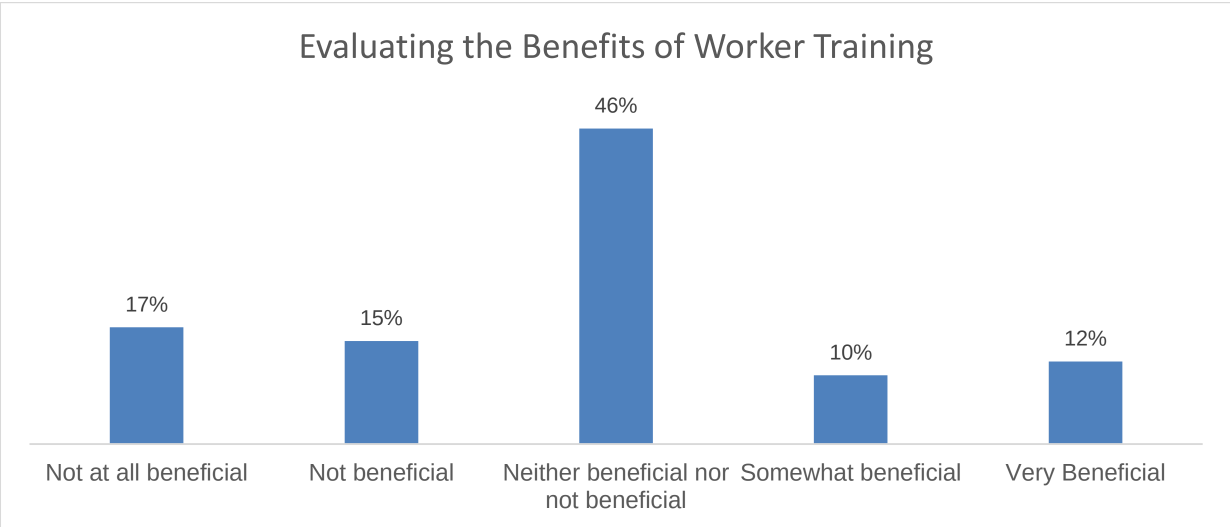
Fig. 34:




The predominant supply of training for women and youth workers in the tourist economy associated with the sites covered in this study comes from informal sources. 62 percent of all respondents indicated that family members and local individuals provide these services. Another quarter of all respondents indicated that they provide training to these employees. This implies that given the small-scale operations of these businesses, most operators are relying on informal training sources and most likely provide on-the-job training for workers. This training is largely restricted to youth, as the data in this study shows that women constitute a low proportion of the employed labour force.

Respondents were then quizzed on their assessment on the utility of training for workers in their businesses. Results from this indicator are shown below:

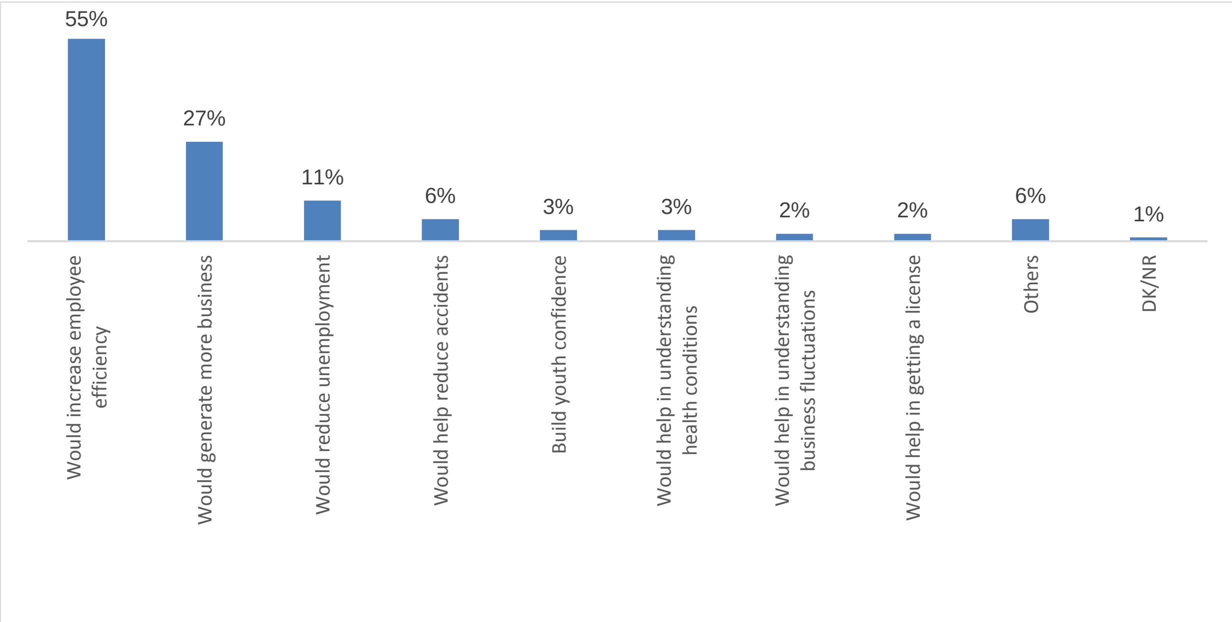
Fig. 35:




As seen above, most respondents are ambivalent regarding the benefits of training workers for their businesses and industry. 46 percent were unsure whether training or skills development would be beneficial to their business or the local tourism economy. Only 22 percent believed that this skills development could be useful for them. Tellingly, 32 percent respondents believed that worker training would not be beneficial for them. This lends credence to the scale and nature of businesses operating around the tourist sites.

Respondents were also asked to assess the perceived benefits of skills development for workers in their industry. These results are shown below:

Fig. 36:




For those respondents that evaluated the skills development as beneficial for their operations, the majority reported that their businesses would benefit from efficiency gains and increasing the scope of business activities. Given that these businesses tend to be low-efficiency and low-profitability in their operations, this finding is crucial and underscores the importance of training workers to provide services to customers visiting these sites. Business owners recognize that increasing the proportion of trained workers would improve business profitability.

## Employment & Training Status of Workers:

In addition to these lines of inquiry, respondents were asked to report the employment status (full-time/part-time) of: all workers employed in their business; and trained workers currently working with them. These results are shown below:

Fig. 37:

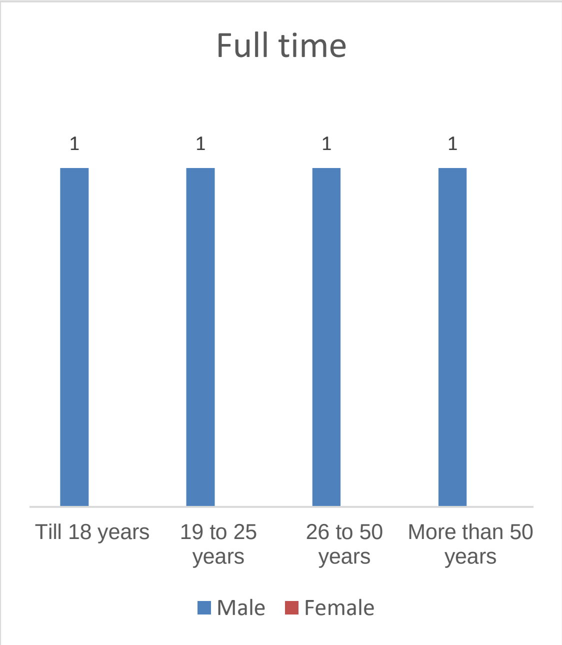



Fig. 38:

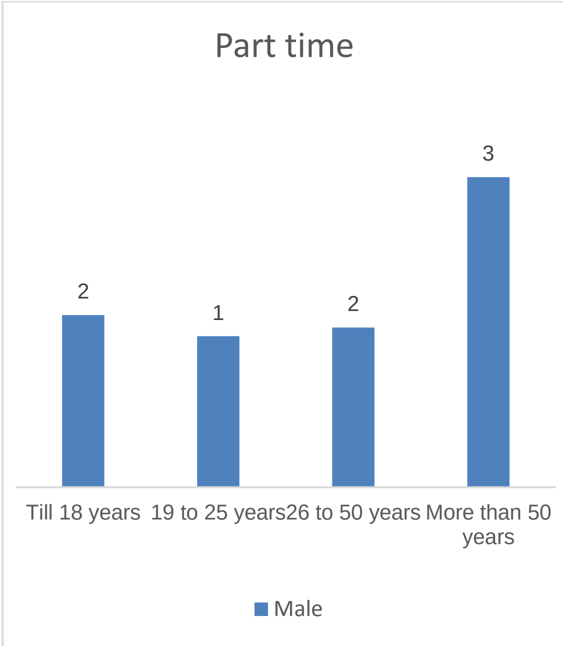



Fig. 39:

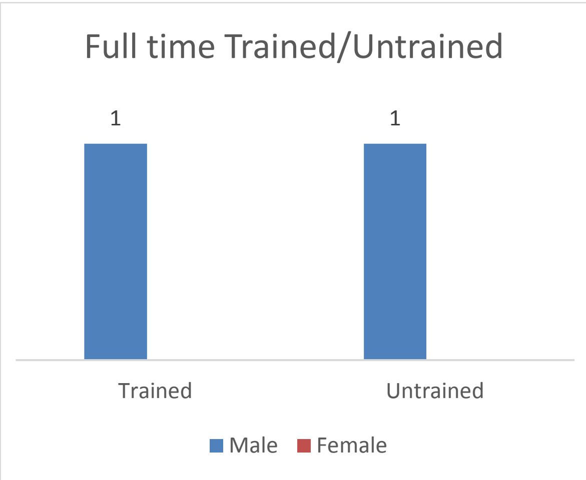
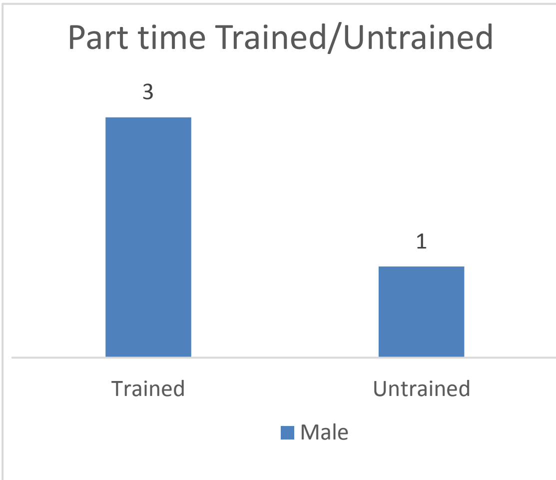



Fig. 40:




As seen above, generally, women are not employed in the workforce currently engaged with tourist businesses in the sites covered in this study. The only businesses that employed women in this study were around the Kalabagh sports and recreational site in Mianwali. However, in line with the overall employment trend, listed businesses are currently operating with small teams of workers. No transgender workers were employed in any business surveyed and listed in this exercise.

On average, each business employs one full-time male worker; however, the proportion of trained full-time male workers to untrained workers is the same for businesses.

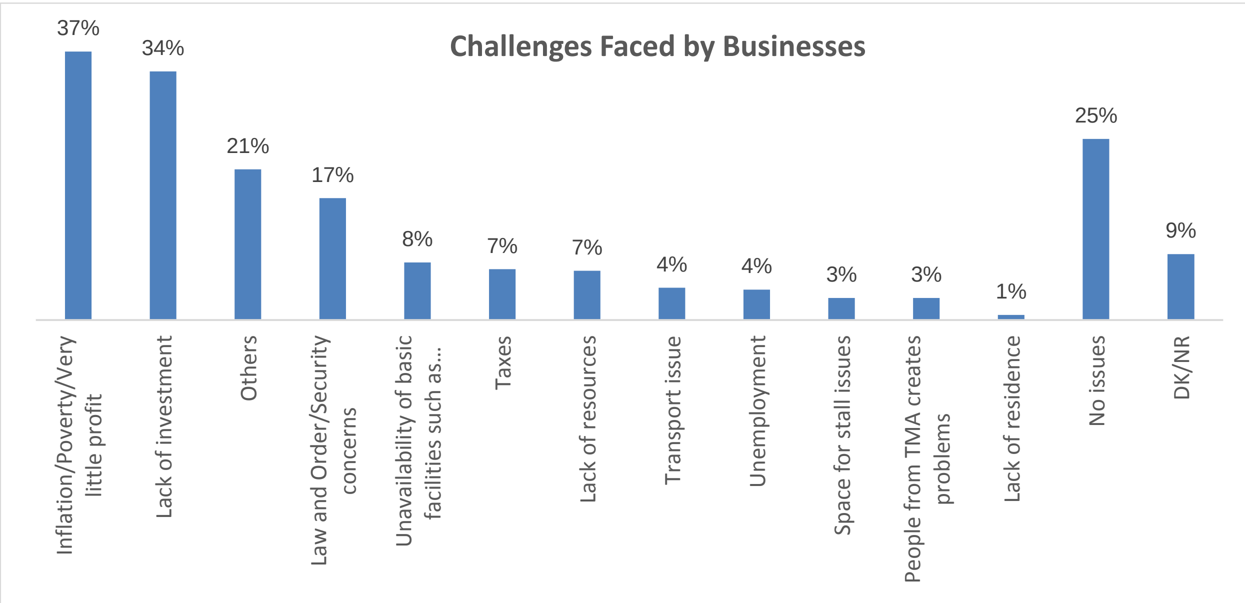
# EVALUATION OF BUSINESS ENVIRONMENT

The second major theme covered in this module was based on the evaluation of the general and specific factors affecting the overall business environment faced by businesses in the tourism economy. This evaluation is critical in that it contextualizes the businesses within their environment, and further explains some of the business features, structures, and dynamics discussed elsewhere in this Report. Several different indicators were assessed under this theme, which are further discussed below.

## Challenges for Businesses:

All businesses listed in this study were asked to evaluate the overarching and specific features of their business environment. This evaluation helps build a typology of challenges that limit the ability of mostly small-scale businesses around these sites to scale efficiently. Respondents were first asked to assess the major challenges faced by their business. Results are shown in the Figure below:

Fig. 41:

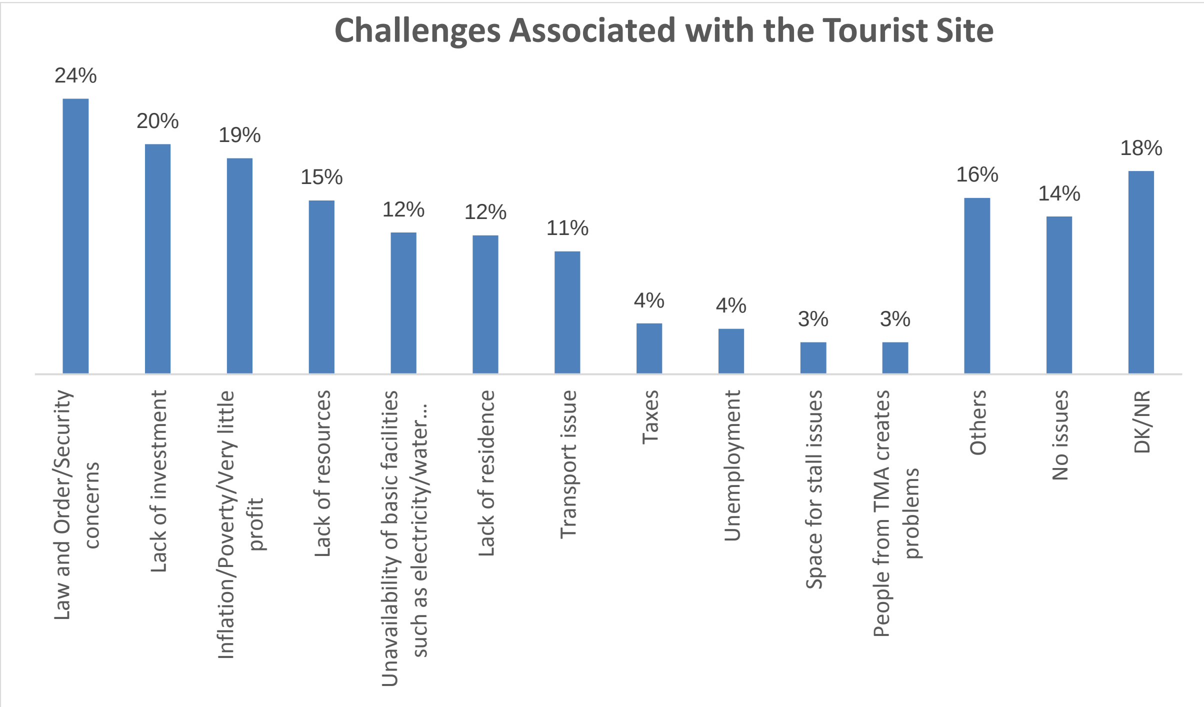



The data shown above supports the finding discussed in the previous sections. Most businesses around the sites included in this study are small-scale, micro enterprises that are generating low revenues and profits, involve low investments, currently generate limited employment, and are operating inefficiently without achieving scale in their operations. 37 percent of all respondents reported that their business's main challenge was low profitability, which in the macroeconomic context of high poverty rates and fluctuating inflations puts them in operational peril. These business owners are likely eking out barely enough profits to meet immediate business and household expenditure needs. 34 percent of all respondents reported lack of investments in their current business as a major challenge to increasing revenues and profitability.

However, a quarter of all respondents reported no major challenge for their business. This might allude to the fact that these businesses are currently generating enough income for the owners – given that an average business employs one worker. At these low scales, the businesses owners are satisfied with the sustainability of their businesses. However, research shows that small-scale and micro businesses are most vulnerable to economic shocks and fluctuations in the business cycles. This feature requires further research and investigation.

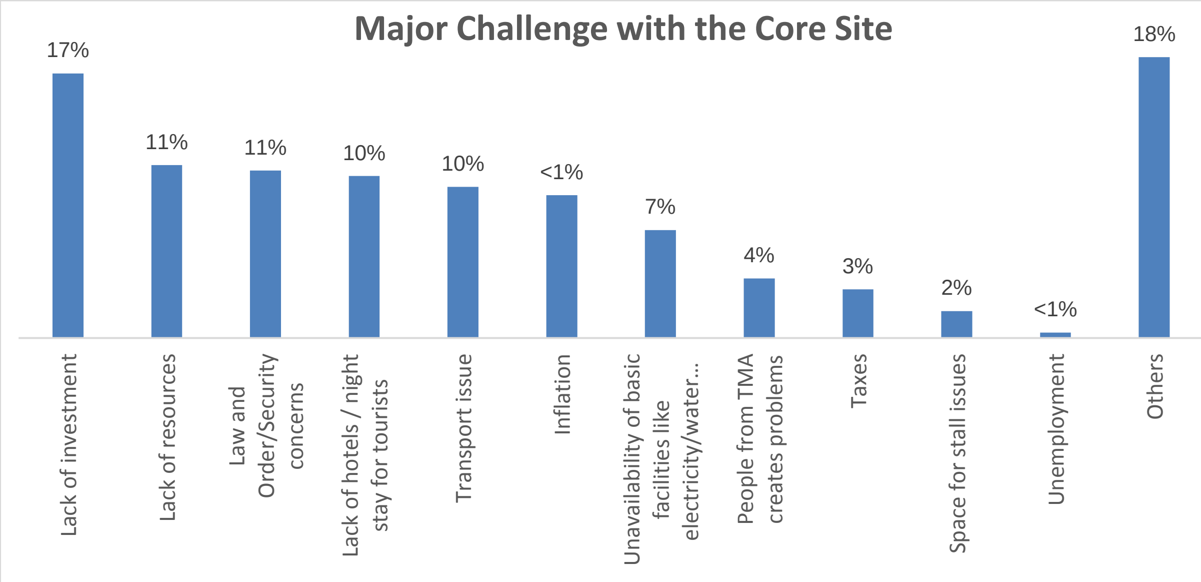
Respondents engaged in this study were also asked to assess the major challenges associated with the core tourist site that their businesses depend on. These results are shown in the Figure below:

Fig. 42:




As seen above, a variety of challenges were identified with the core tourist site. The diversity of these challenges indicates that the businesses are operating in a challenging tourism economy, which could be affecting their current viability, profitability, and specific business challenges. The most common types of problems identified with the tourist sites were: law and order/security concerns; lack of investments in the sites; low profitability potential associated with these sites; and lack of resources at the core site. These overarching economic challenges make the business climate unfavourable, disruptive, cyclical, and structurally locked into low profitability and efficiency patterns. A variety of reasons could explain these weaknesses: low investment in the physical infrastructure; weak security situation and state's inability to guarantee peace and stability; lack of attractions in and around the core sites that would attract and expand tourist demand patterns etc. Respondents were then asked to choose the one major challenge that they felt incurred difficulties for the overall business climate. This result is shown below:

Fig. 43:




Drilling down further into this line of inquiry reveals that the overall shortage/lack of investment in the physical infrastructure in and around core tourist sites, and associated lack of resources in the local economy are major challenges. Together these two obstacles are seen by most respondents as the sources of weaknesses in the overall business environment.

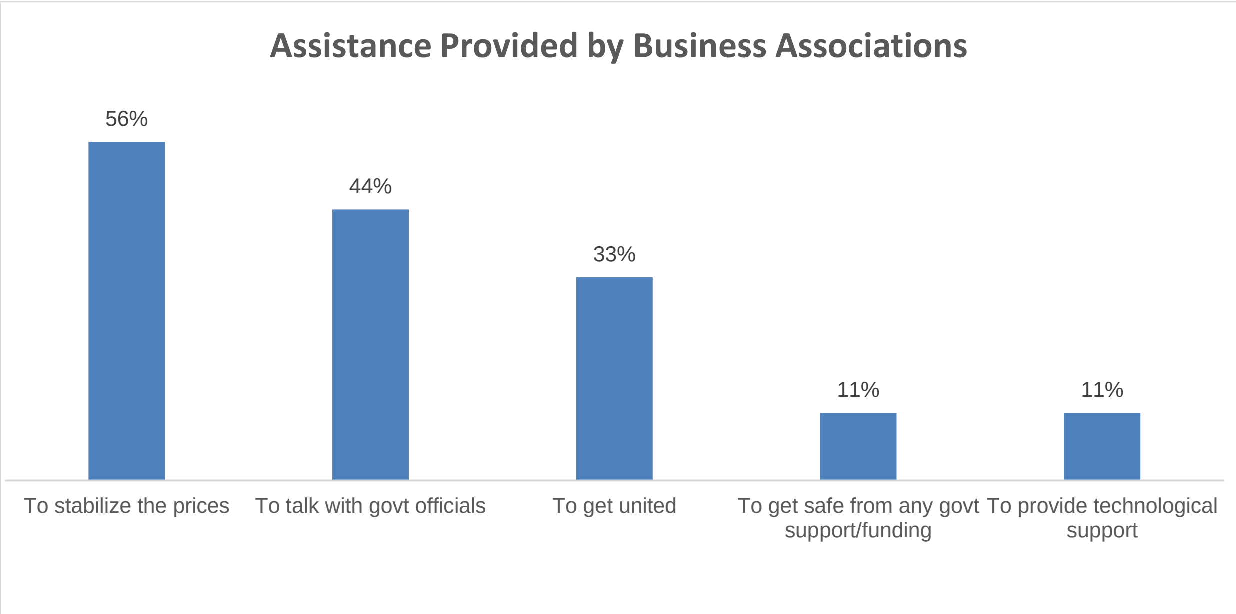
## Participation in Business Associations:

All businesses listed were asked to identify if they were members of any business association:

Fig. 44:

This finding is critical in that 98 percent of all listed business were not currently registered as members of any representative business association. Membership and participation in businesses associations is a critical component of the organizational structure of industries. Such associations help member businesses by pooling in their interests and resources, which allows for the pursuance of common goals. These goals can range from public relations campaigns for the industry to lobbying the government for favorable policies towards the given industry. However, very few listed businesses included in this study were a part of this formalized institutional setup. This implies that most tourist businesses around these sites are failing to capitalize on the strengths and advantages that can be accrued by joining or forming business associations. The meagre 2 percent of businesses were asked to assess and report the benefits of membership in a business association. Their responses are shown in the Figure below:

Fig. 45:

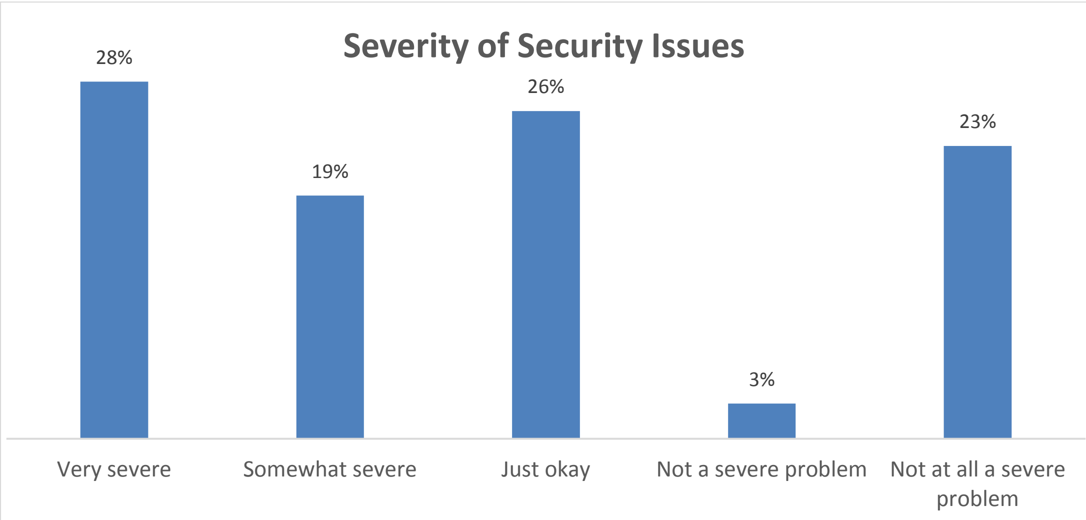



As seen above, participation in formal business associations helps member businesses collectivize their interests and pursue common goals through shared strategies. Business associations are helping some listed businesses with controlling the prices of raw materials and supplies, as well as creating a united platform through which these businesses can engage government officials and advocate for favourable policies. However, a large segment of all listed businesses are currently locked out of these benefits.

## Security Environment around Tourist Sites:

Over the last fifteen years or so, Pakistan has borne the brunt of a substantial onslaught of domestic terrorism, violence, and instability. Areas all across the country have been caught up in this cycle of violence, which has negatively affected the domestic business environment and confidence, and placed fetters on the country's economy. Many terrorist groups have intentionally targeted civilian tourist sites – specifically religious and spiritual sites like shrines and tombs, which has led to death of hundreds of innocent people. This breakdown in general security has given rise to increase in criminal activities. In this study, respondents were asked to assess the security situation in their areas. Results on this indicator are shown in the Figure below:

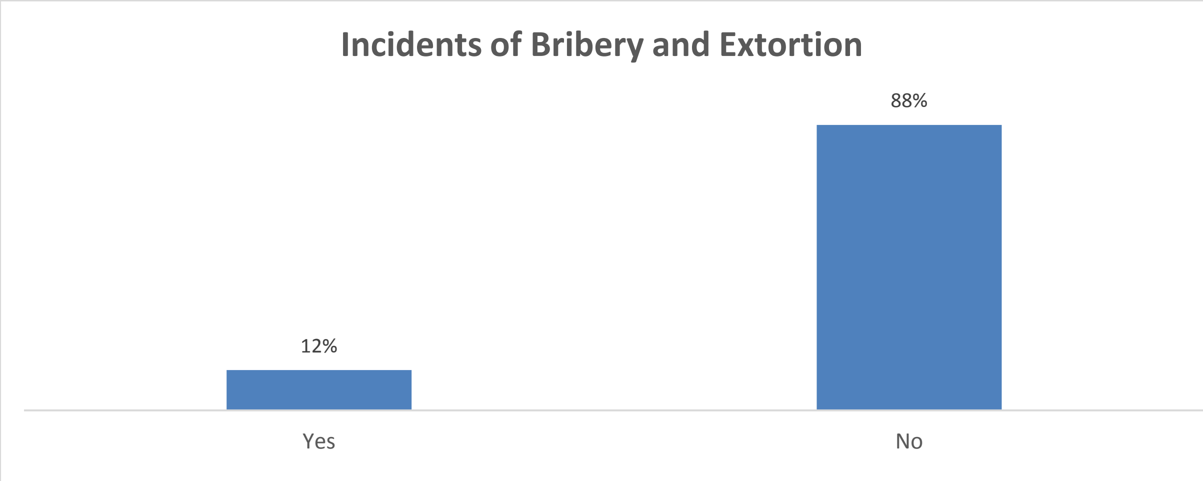
Fig. 46:




This query was structured around the localized law and order situation, specifically asking respondents to evaluate the environment by taking into account incidents of robbery, theft, and kidnapping. As seen in the data above, 47 percent of all respondents evaluated the general security situation as severe to somewhat severe. Another 26 percent found the situation precariously balanced, with significant risks. This is indicative of a generally poor law and order situation around the selected tourist sites, which negatively impacts the flow of customers, as well as the ability of businesses to operate freely, at maximum operational efficiency levels.

Businesses in Pakistan also face another critical security risk: the incidence of corruption, bribery, and extortion. This pilferage is a major drag on business profitability and efficiency gains. Respondents engaged in this study were asked to assess whether they had been targeted by any of these actions. Responses are shown in the Figure below:

Fig. 47:

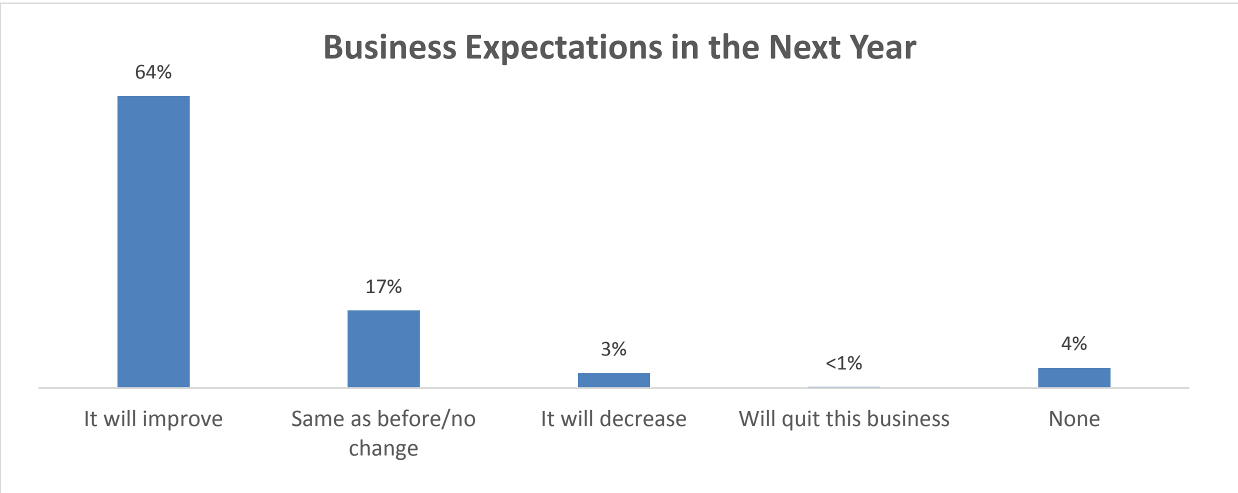



While the majority of businesses reported not being targeted by extortionists, or paying bribes or illegal taxes, 12 percent of listed businesses were exposed to these practices. This is a signal of a weak and risky business environment, which undermines business performance. More critically, it has a negative impact on the overall business climate and confidence in the local tourist economy.

## Business Sentiments and Expansion Plans:

Business sentiment is critical to understanding the flow of resources and investments into an economy. This study aimed to gauge business sentiments by asking respondents to assess their current state of operations, as well as project and provide indications of their future planning. Specifically, listed businesses were first asked to report their business expectations in the next year. These results are displayed in the Figure below:

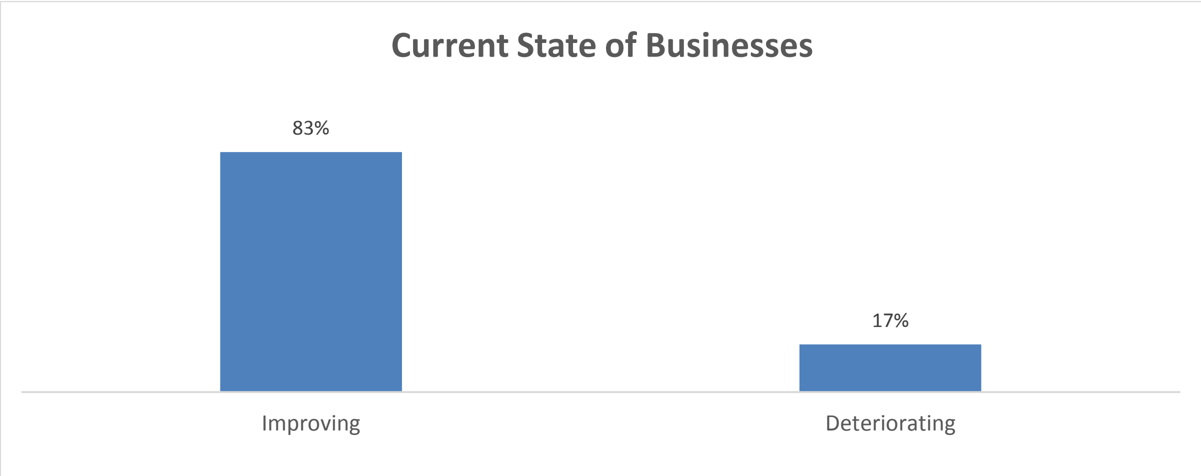
Fig. 48:



This is a vital insight, as nearly 2 out of every three listed businesses are expecting their businesses to improve and grow in the next year. Given the small-scale of operations of most of these businesses, this finding suggests that business owners are expecting both their internal operations (revenue, profitability, incomes) and the external economic situation to improve significantly in the coming year.

To assess the state of affairs currently, business respondents were asked to indicate whether their business's health was improving or deteriorating. These responses are captured in the Figure below:

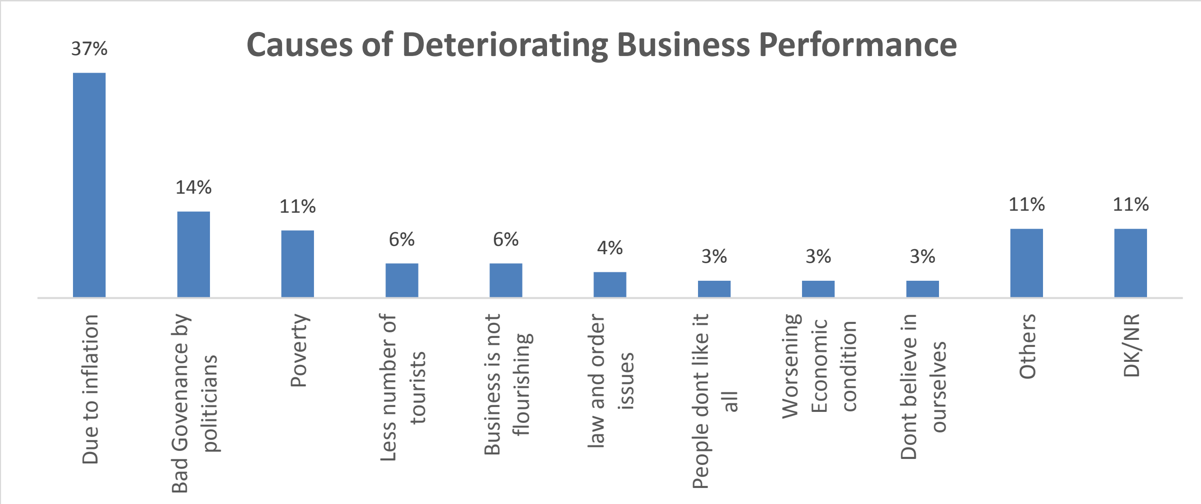
Fig. 49:




In line with the previous finding, 83 percent of all business respondents indicate that their businesses are on an improvement trajectory. This implies that while these businesses are small-scale limited operation enterprises, their profitability and performance is improving. Given the recent acceleration in macroeconomic conditions in the country, the overall businesses sentiment and evaluations are also on an upswing around the sites selected for this study.

For those businesses that reported that their business performance was currently deteriorating, they were asked to assess the cause. This data is shown in the Figure below:

Fig. 50:




The businesses assessed in this study are operating at a small-scale, where macroeconomic fluctuations and headwinds can have significant impact of the health of the operations. As seen above, 37 percent of all businesses that reported going through erosion in performance based this on the high rate of inflation. This implies that changes in prices of inputs affect the incomes and profitability of these businesses significantly.

Looking forward, business owners were asked to report if they planned on expanding their operations in the near future, and simultaneously, identify hurdles that limit their business expansion strategies. Results on these indicators are shown in the Figures below:

Fig. 51:

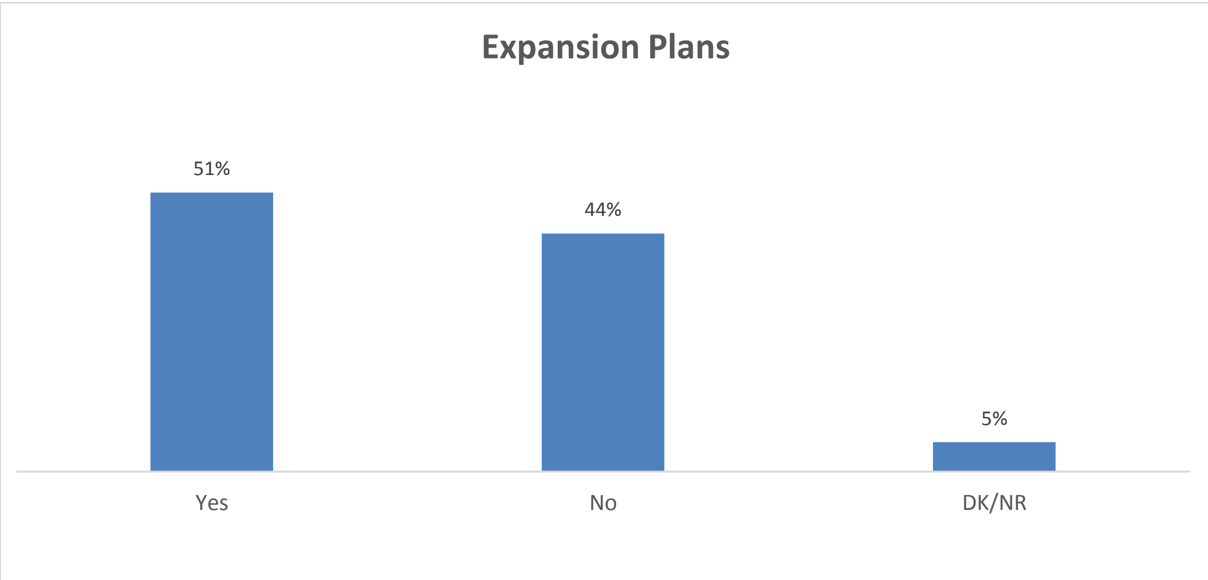
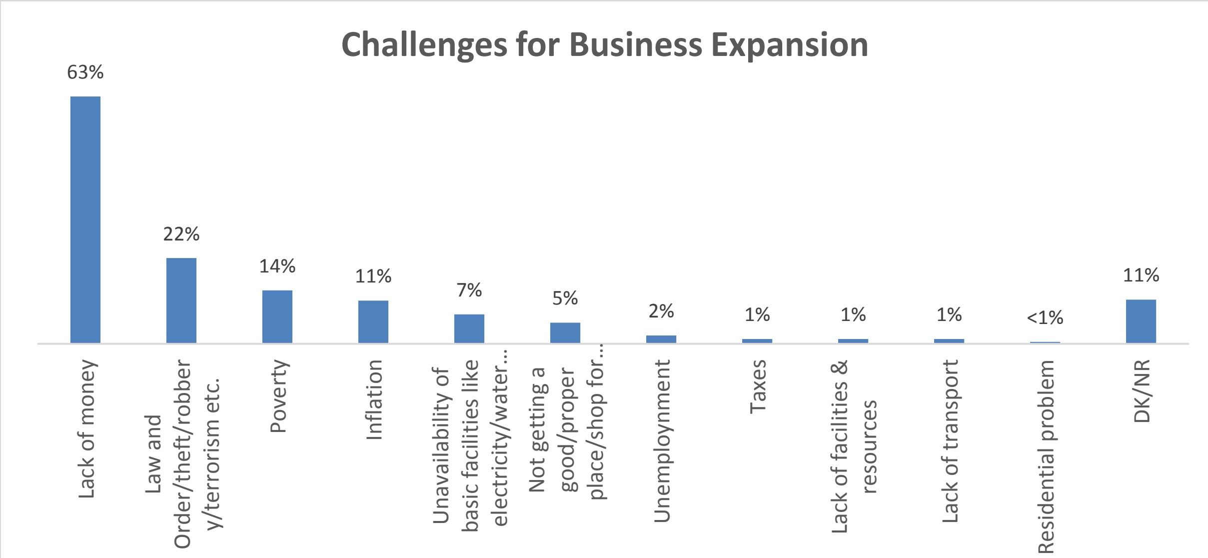


Fig. 52:




These results provide both reasons for optimism and pessimism. On the optimistic side, at least half of all listed businesses stated that they planned on expanding operations in the near future. This fits in line with the previous finding that most businesses reported improvements in current operations, which provides a basis for expansion strategies and plans in the near future. However, when identifying challenges for business expansion around these sites, the most frequently identified reason is the "lack of money". As discussed earlier in this Chapter, most businesses listed in this study are operating at low investment levels, and generate limited revenues and profits. It can be inferred that these same businesses also face limitations in their ability to raise funds for capital investments, operational expansion, and improvement of products and services currently on offer.

## Pressing Challenges:

A core sub-indicator in the business evaluation theme was the identification of general challenges facing respondents. All listed businesses were presented a list of generic problems, and asked to identify and rank the most pressing challenges from this basket. The results are shown in the Figures below:

Fig. 53:

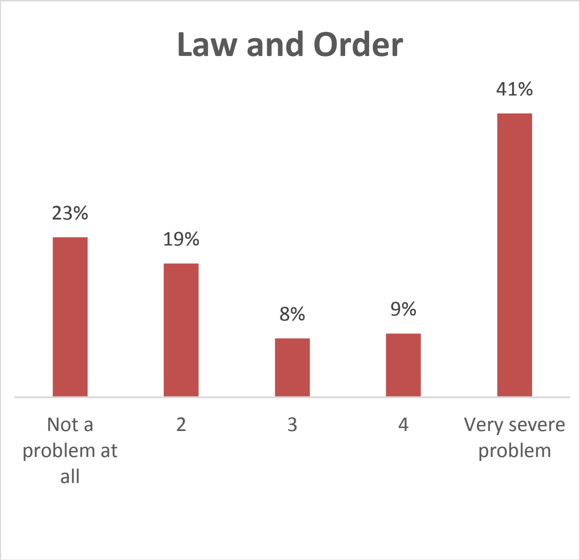



Fig. 54:

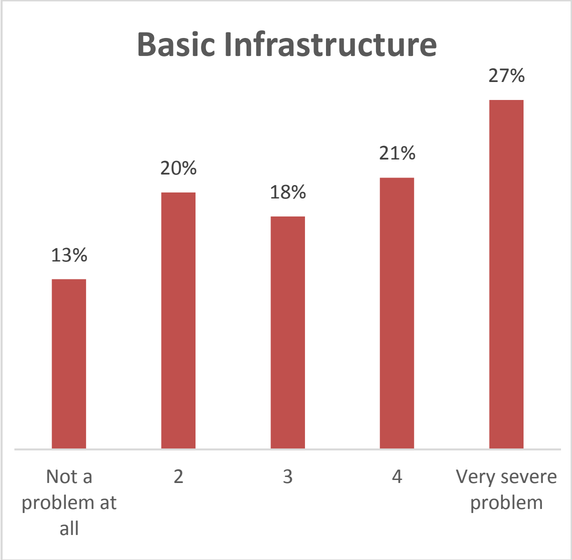



Fig. 55:


Fig. 56:

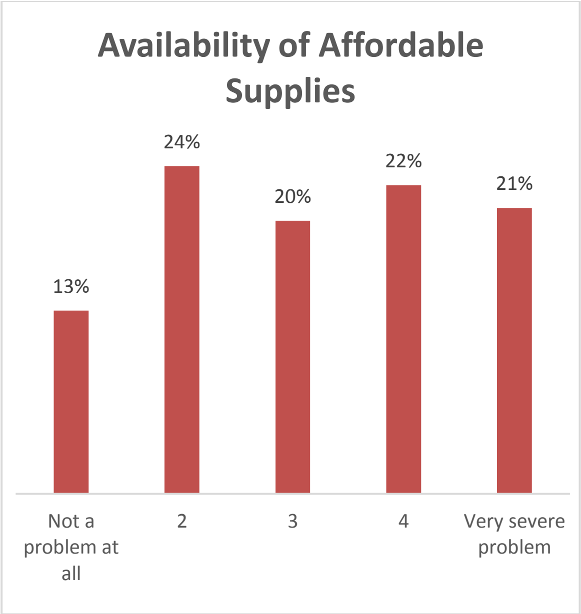


Fig. 57:

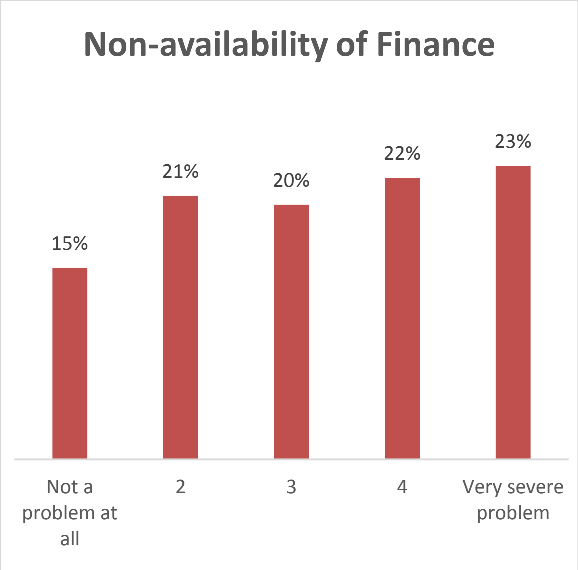



Fig. 58:

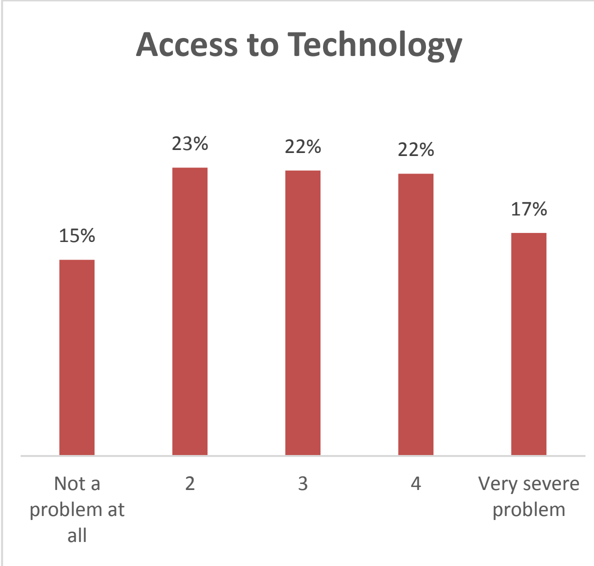



Fig. 59:

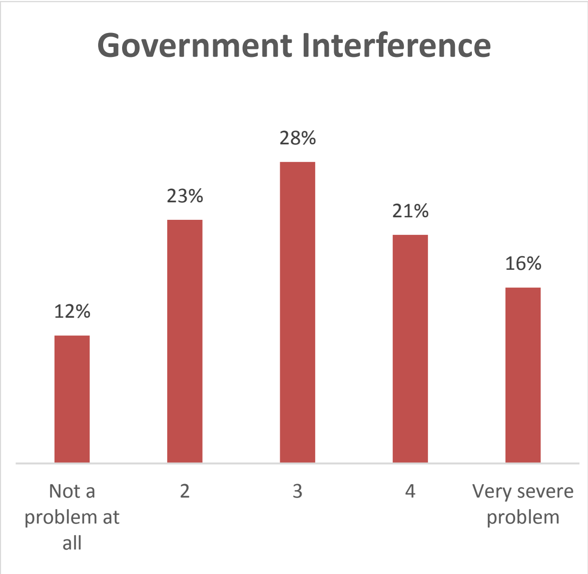



Fig. 60:

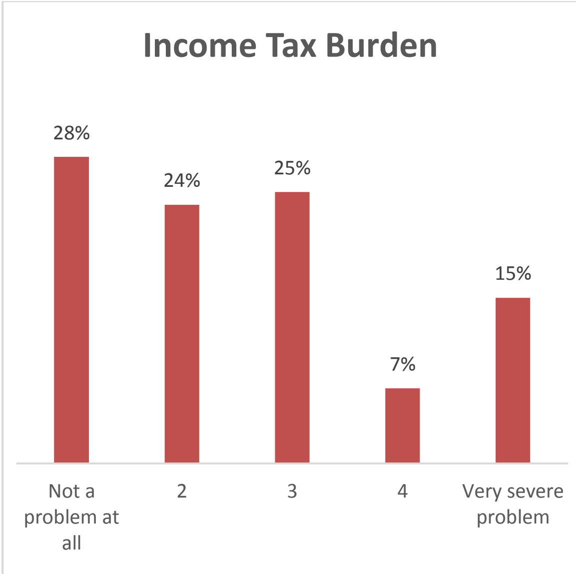



Fig. 61:

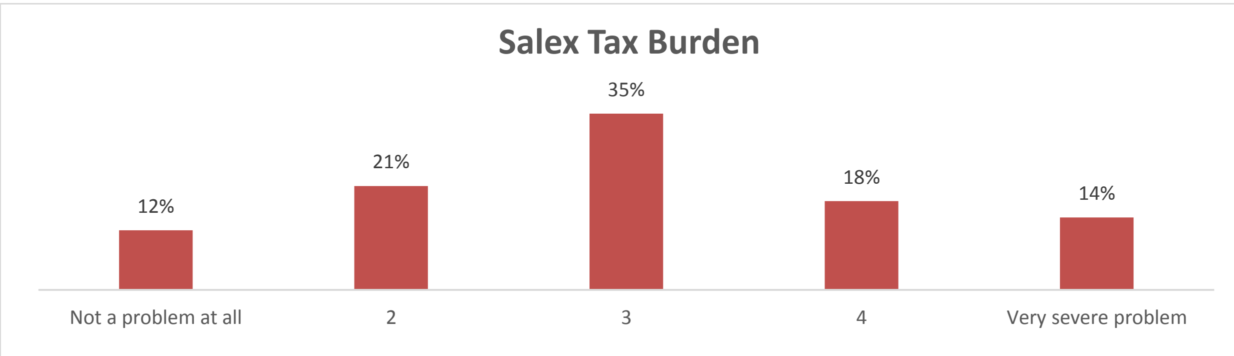


Fig. 62:

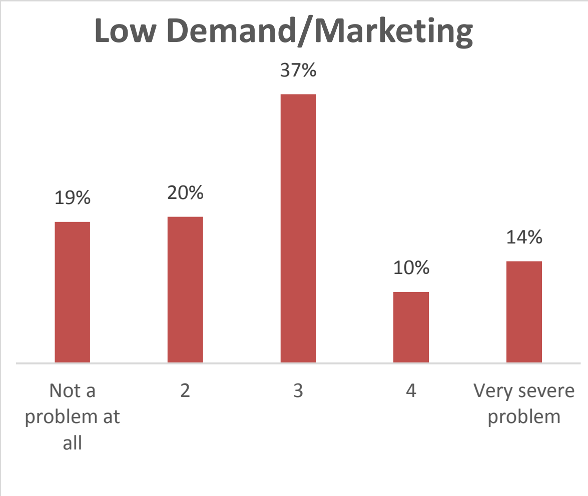
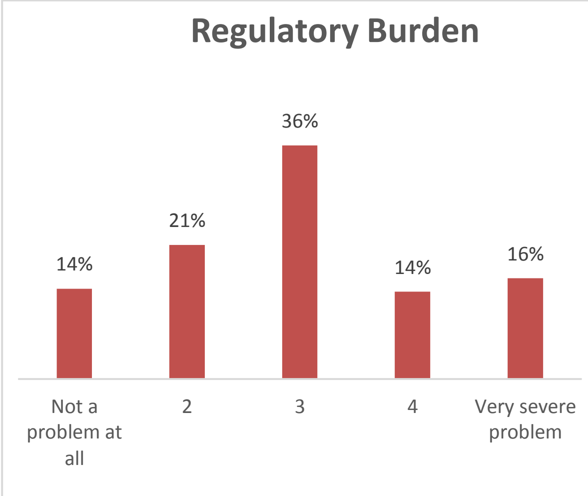



Fig. 63:




This typology of problem identification and associated severity analysis reveals several insights into each sub-indicator. The insights are discussed below:

- **Law and Order:** Law and order is generally identified as the most severe of all problems facing these businesses. This implies that the security environment, especially low incidence of crime is vital for these businesses to operate, and for customers to frequent these destinations.

- **Basic Infrastructure:** Businesses report that the quality of general infrastructure around tourist sites is the second most severe issue facing their operations. Quality public infrastructure is essential for markets to function. Tourist economies in particular depend heavily on the quality of infrastructure, which, in this case, has been evaluated as lacking by most businesses.

- **Finance and Investment:** As discussed in the previous sections, the non-availability of financial investments is a key impediment on the operational efficiency and growth performance of listed businesses.

- **Technology:** Most businesses have low technology intensity in their operations, and do not consider this variable as particularly problematic for their operations.

- **Taxation:** Given that the majority of listed businesses are operating informally, they are likely also operating outside of the tax streams, and therefore do not see taxation as a major issue.

- **Marketing and Demand:** Since most businesses listed in this study are small-scale, they are also likely weak on branding and marketing. Added to this operational weakness, the general environment (security and infrastructure) acts as an impediment to sustained and robust customer demand, i.e. frequency of visits. This variable is evaluated as a mildly severe problem by business respondents.

# PROFILES OF TOURISTS

CHAPTER 5

# CHAPTER 5:
# PROFILES OF TOURISTS

Most of this study's focus so far has been on the supply-side dynamics of the tourism economy around the selected side. Previous chapters investigated different features of the business environment and operational performance around the selected sides. However, this supply-side picture can only inform policies and understanding of the local economy if paired with examination of the dynamics of consumer (tourist) demand. This Chapter shifts the perspective of the local economies around the selected tourist sites by gathering and assessing the views of tourists that visit these destinations.

Understanding consumer demand is a vital ingredient in the analysis of tourism economies. Tourists demand a variety of products and services that constitute the demand facing businesses. Disaggregating motivations for undertaking tourism, means of accessibility and transportation, experiences while on tour and perception analysis are all critical aspects of measuring and evaluating tourist demand. This study examined tourism demand from five major thematic perspectives: travel frequency and demand structure; sources of information and knowledge regarding sites; overall experience and evaluation; expenditure analysis; accessibility. Together these five themes provide a multidimensional view of the tourist demand and experience around selected sites. Results on all five themes are discussed further.

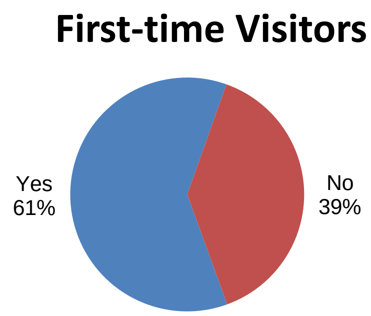
## Travel Frequency and Demand Structure

In this thematic component of the module, the research team asked visitors at the selected tourist site to provide information on the frequency of their visit, as well as the structure of overall consumer demand i.e. composition of travel groups.

**Travel Frequency & Demand Features:**

First, all tourists visiting these selected sites were asked if this was the first time they were visiting this destination. As the Figure below shows, nearly three in every five tourists at these sites were undertaking a first-time visit to these sites.

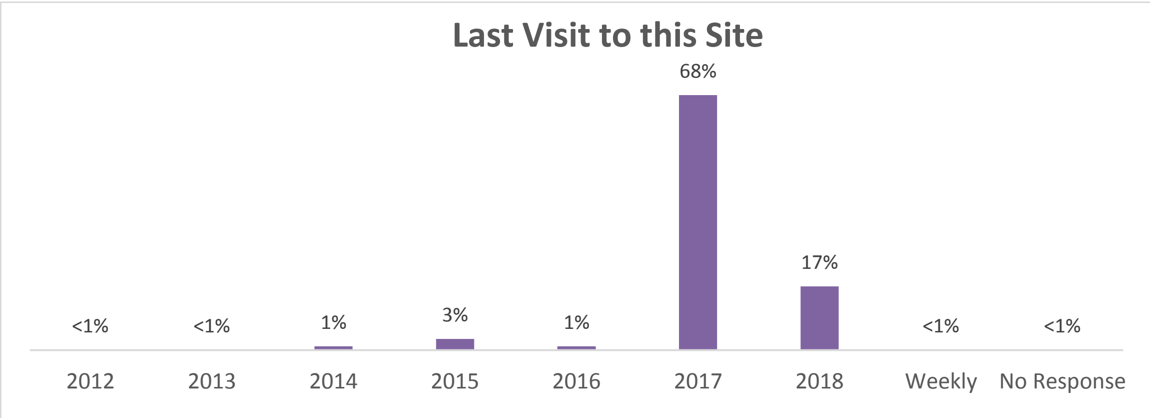
Fig. 64:



This is a crucial finding in that it suggests that demand for products and services is largely coming from new/fresh customers to these sites. This implies that in order to capitalize on this new demand source, businesses must be able to meet and exceed tourists' demand expectations. Without this demand-servicing, businesses are unlikely to generate customer loyalty and repeat demand from these first-time visitors.

Those tourists who had visited before were then asked to recall the last time that they visited the site. The results are shown in the Figure below:

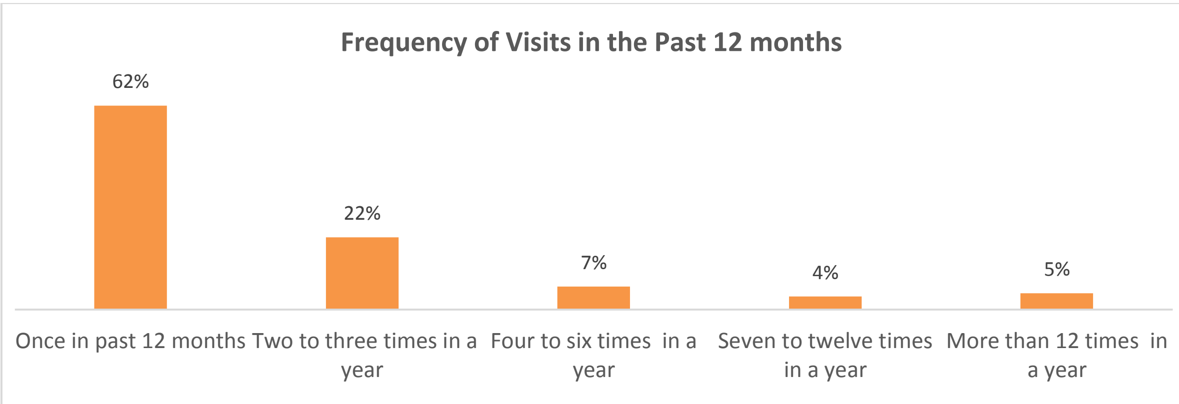
Fig. 65:




As seen above, of the visitors who had been at these destinations before, the majority, 68 percent, had visited the site in 2017. This implies that most customers who had previously been to this site, had visited within the last few months, implying a repeat customer demand. This is a positive indicator of the strength of the demand, as repeated customers tend to arrive back at the site within a few months of their last visit.

To drill further down into this finding, the study asked respondents to indicate how many times they had visited in the last twelve months. The results for this query are show in the Figure below:

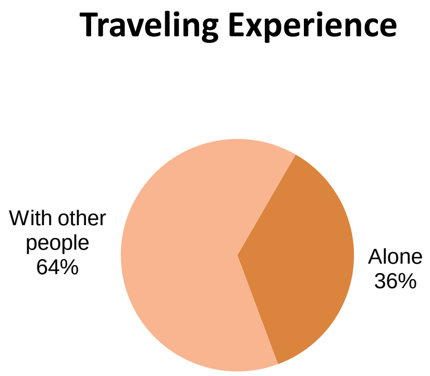
Fig. 66:



As most customers to these sites are fresh/new and first-time visitors, 62 percent reported that this was the first time they were visiting this destination in the last calendar year. However, of the repeat customer category (39 percent of all visitors), a healthy 22 percent had visited the area two-to-three times in the last twelve months. This indicates that repeat customers to these sites generally undertake more than a single trip in a given year.

Respondents were also quizzed on the whether they were undertaking the trip alone or as part of a group. Group tourism is a common feature of tourism economies, and allows customers to bundle their resources and demand as part of the tourist experience. The results for this indicator are shown below:

Fig. 67:




These numbers are interesting in that they reveal that the majority of tourists, 64 percent, arriving at these sites are a part of a group. This implies that businesses are facing group consumer demand, and likely have to offer bundled products and services with group discounts and features. However, slightly more than one in every three tourists is arriving at the site alone. This is an important insight. Given the first-time nature of most visitors' trips, customers arriving at these destinations alone are likely evaluating and sharing their experiences. Meeting these lone customers' demands could be vital for translating them into frequent and repeat group visits.

Tourists were also asked to indicate the composition of their groups. These results from the selected sites are shared below:

Fig. 68:

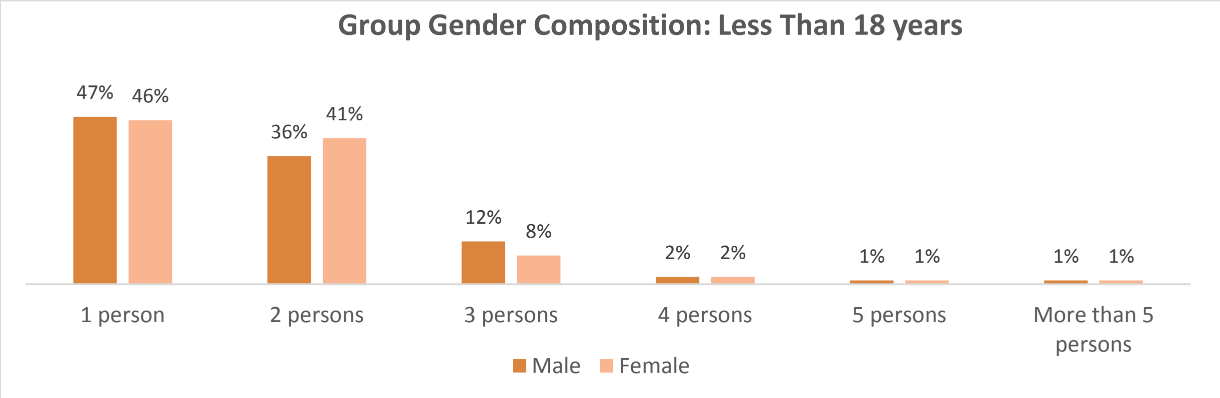
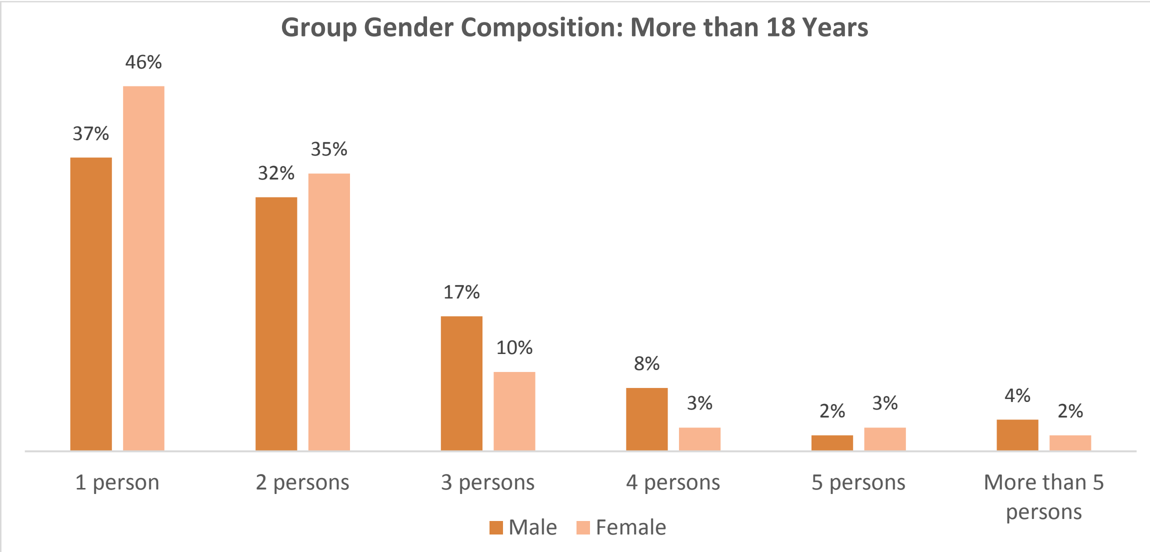



Fig. 69:




These results show that the majority of tourists around these sites visit with at least one other person. The gender distribution of these groups almost equally divided between men and women, indicating that the sites are attractive for both genders. Groups of three are the second most common type of group tourists arriving at these sites. The majority of group visitors at these sites are likely to above the age of 18 years.

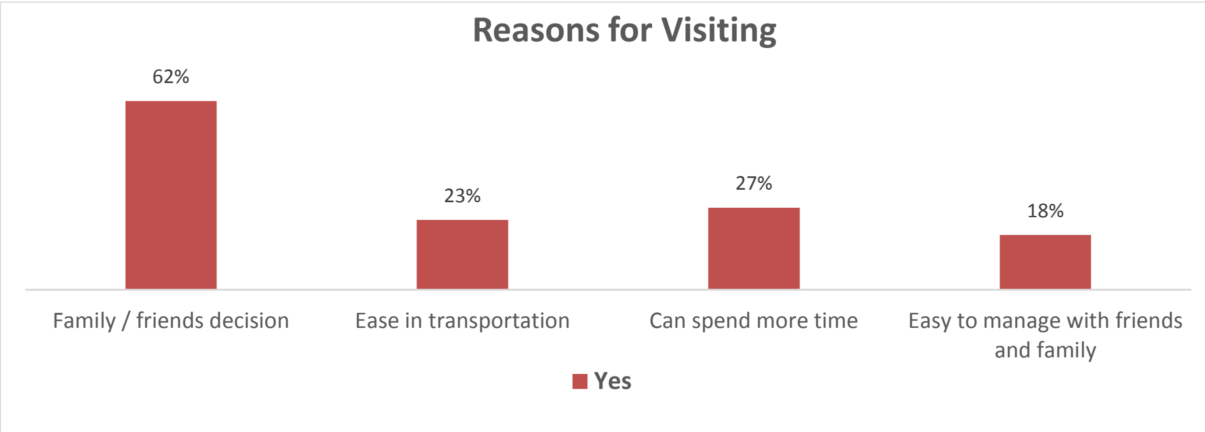
Visitors to these sites were asked to indicate the timing of their arrival/visit to the tourist destination. This query provides an indication of the flow of customers to these sites, and can help businesses map the daily fluctuation of consumer demand. The results showed that most customers arrived at the sites between 11am and noon, or just before lunch hours.

On average tourists arrived at
11.20 am

## Consumer Choice:

Tourists were also asked to reveal the motivations behind their trip i.e. what made them choose this specific site. This query gets at uncovering the core motivation behind the trip, which can be useful in helping shape the products and services available for customers. This result is shown in the Figure below:

Fig. 70:




A substantial number of respondents indicated that they were visiting the site at their friends or family's suggestion. This indicates that the tourist demand around these sites is highly dependent on recommendations. Positive tourist experience is likely translating into repeat customers. As most customers around these sites are first-time visitors, it is likely that they were brought to these destinations by a friend or family member who had previously been here. This word-of-mouth recommendation is a major driver of tourist frequency at these sites.

## Planned Duration of Stay:

Drilling further down into the dynamics and features of demand around these sites, tourist respondents were asked to indicate their planned duration of stay. This intention reveals the probable range of products and services consumers might demand: longer demand duration likely translates into higher expenditure at the tourist sites. The results for this query are shown in the Figure below:

Fig. 71:

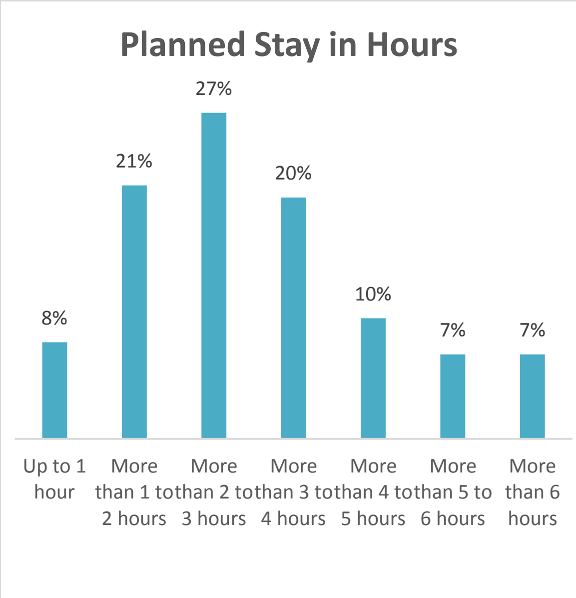
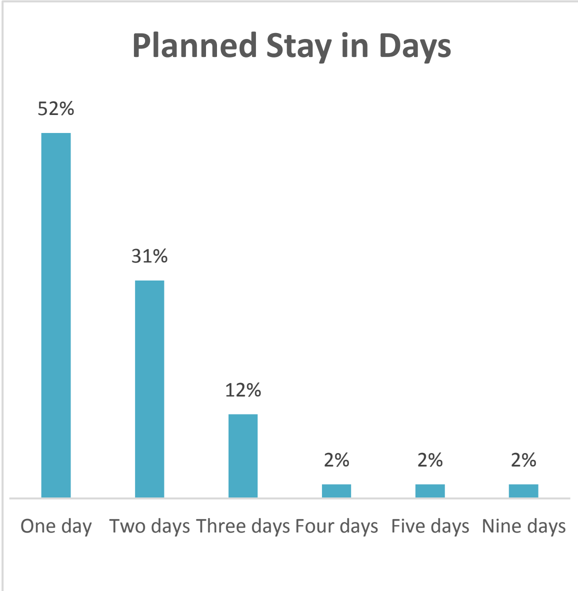



Fig. 72:

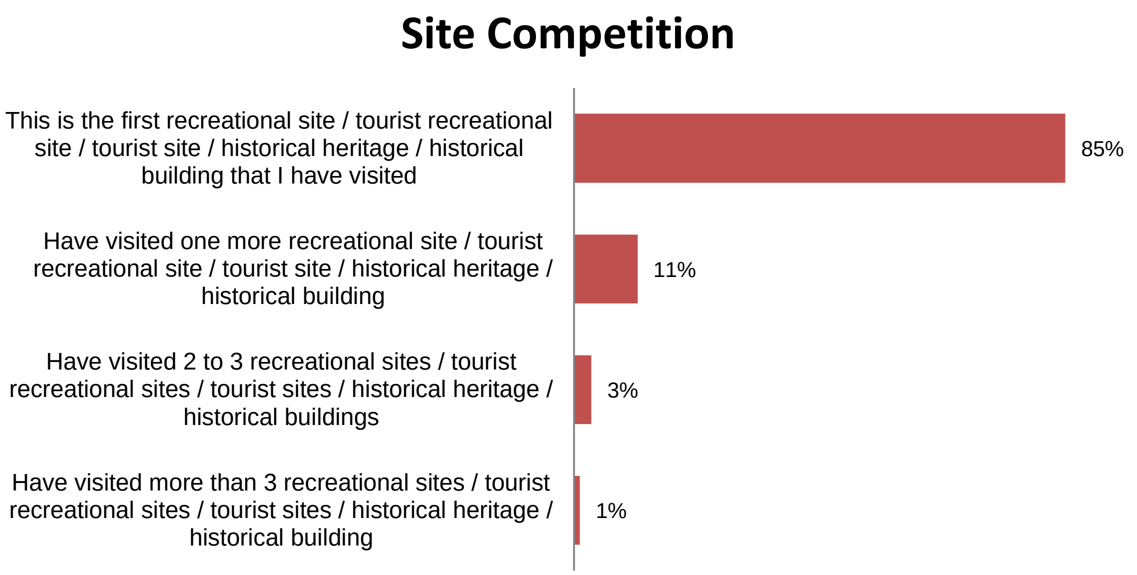



The majority of all tourists (68 percent) at these destinations plan to stay between one and hour hours at these sites. This indicates a low-to-medium intensity of demand in terms of the duration spent by customers in and around these sites. Only 7 percent of all customers indicated planning on staying at these destinations for more than 6 hours. This implies that most customers arriving at these sites are day visitors, who tend to arrive in the morning hours, and leave by early-to-late afternoon. This finding shows that the businesses are likely facing demand for short durations, with a limited range of products and services needed by tourists. The majority of customers at these sites are planning single-day visits. About a third of all tourists plan on staying for at least two days. This longer duration expands the range and variation of customer needs. However, very few customers stay at these sites beyond two days.

## Site Competition:

Customers were quizzed on whether they had visited any other tourist destinations during the same visit. This data shows whether the site under review faces competition from other tourist destinations. As the results in the Figure below indicate, the overwhelming majority of all respondents, 85 percent indicated that this was the first destination that they had visited during the current trip. This implies that customers arriving at these sites are visiting with the sole intention of staying at the local attraction during this visit. This offers businesses, collectively, a monopoly over the customer demand and indicates low competition between sites.

Fig. 73:


Site Competition
This is the first recreational site / tourist recreational site / tourist site / historical heritage / historical building that I have visited
85%
Have visited one more recreational site / tourist recreational site / tourist site / historical heritage / historical building
11%
Have visited 2 to 3 recreational sites / tourist recreational sites / tourist sites / historical heritage / historical buildings
3%
Have visited more than 3 recreational sites / tourist recreational sites / tourist sites / historical heritage / historical building
1%

## Sources of Information and Knowledge

As this study shows, word-of-mouth and recommendations play a crucial role in attracting visitors to these sites. To unpack this and confirm the sources of knowledge and information regarding the selected sites, visitors were requested to provide information on where they had acquired relevant information before planning and undertaking the visit.

### Sources of Information & Knowledge:

Fig. 74:

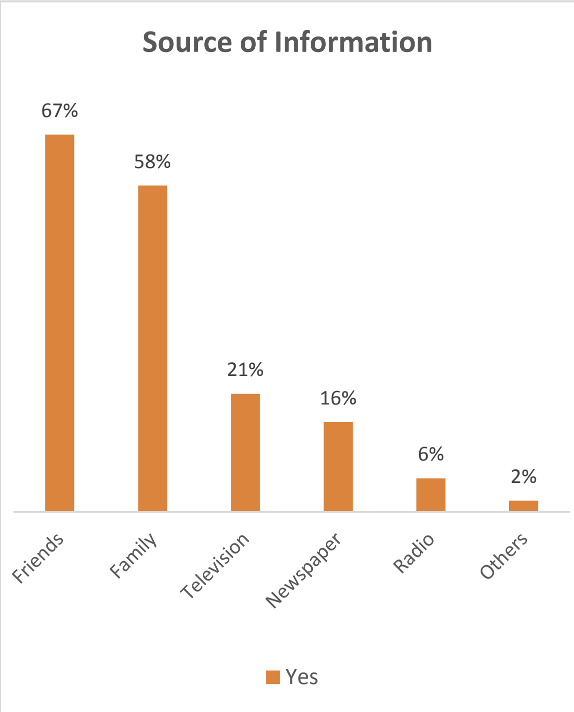
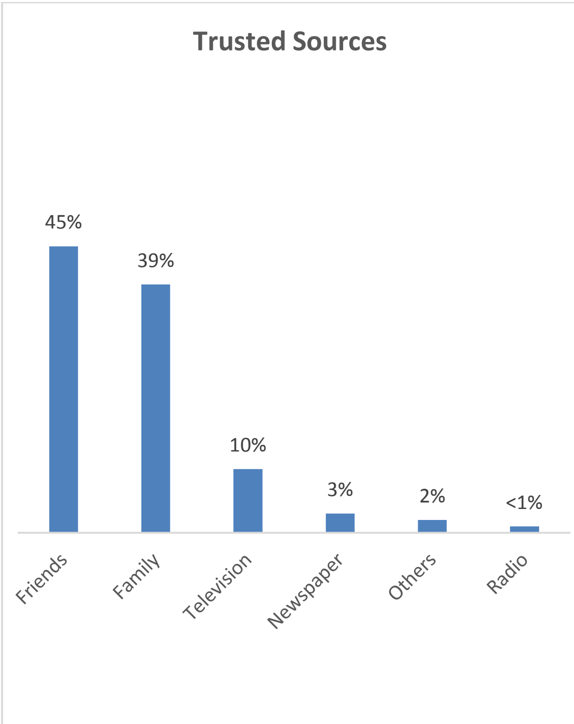



Fig. 75:




Friends and family hold the key to unlocking customer demand at these tourist sites. Visitors only plan trips to these destinations when advised and informed by their friends or family. As seen above, most visitors acquired information about the sites they were visiting from friends and family. These sources were also the most trusted by all visitors arriving at the selected destinations. For businesses in the local economy, it is critical to understand that their customer demand is dependent entirely on the personal experiences of individual clients. These clients are the vital source for attracting their peer and familial networks to the sites.

## Experience Evaluation

This study engaged tourist respondents in evaluating the quality of their trip and the overall experience of visiting the relevant selected site. This experience evaluation opens a window into consumer satisfaction. Given the primacy of customer experiences and word-of-mouth recommendations by friends and family for the tourist economy around these sites, it is critical to understand customer satisfaction levels and evaluations.

## Overall Assessment:

Overall, customers were generally happy and satisfied with their experience of visiting these sites, as shown in the Figure below:

Fig. 76:


84 percent of all respondents rated their experience highly. This bodes well for these sites, and the businesses dependent on the tourist economy. Given that the majority of visitors were fist-time tourists to these destinations, who were convinced by friends and family members to visit; this finding shows that the local tourist economy is experiencing repeat and expanding demand.

## Disaggregated Evaluation of Experiences:

Each respondent was asked to evaluate various aspects of their experience. These results are shown below:

Fig. 77:

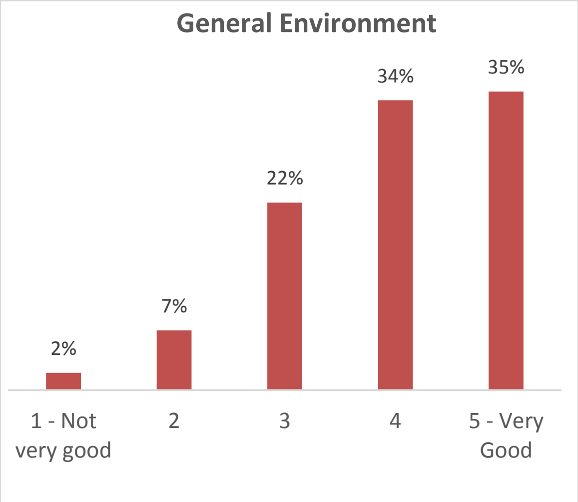



Fig. 78:


Fig. 79:


Fig. 80:

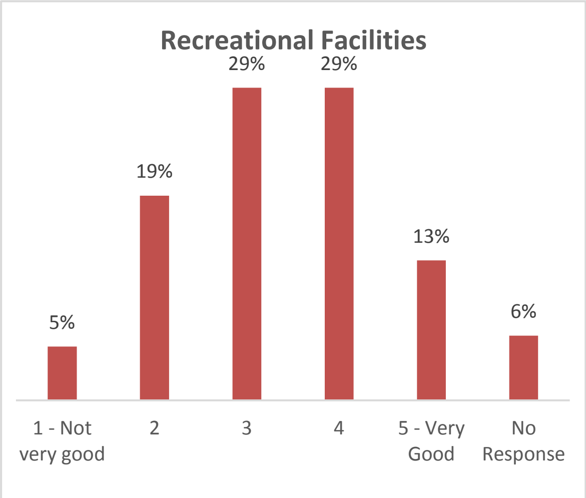


Fig. 81:

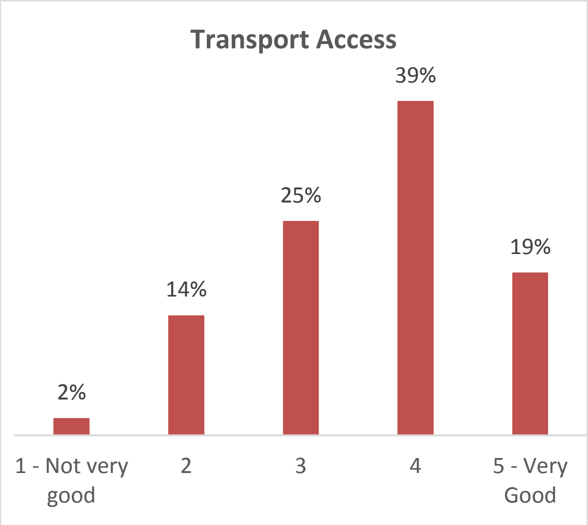



Fig. 82:

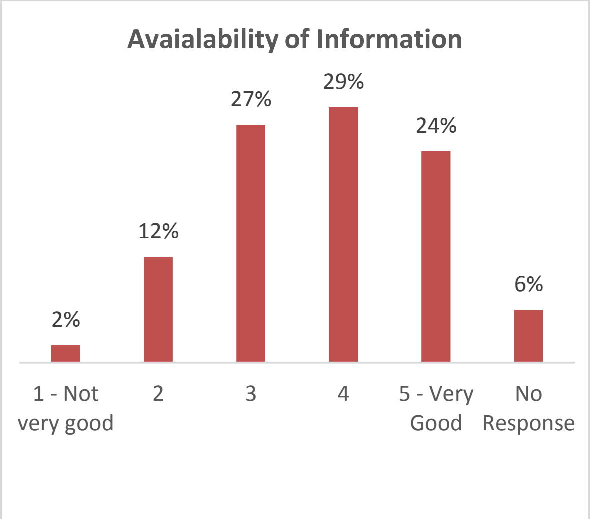



Fig. 83:

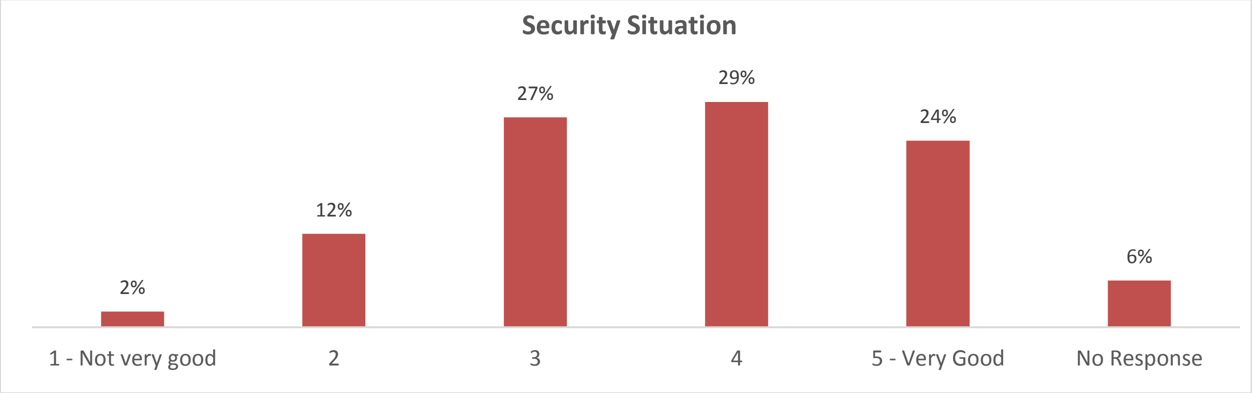


Fig. 84:

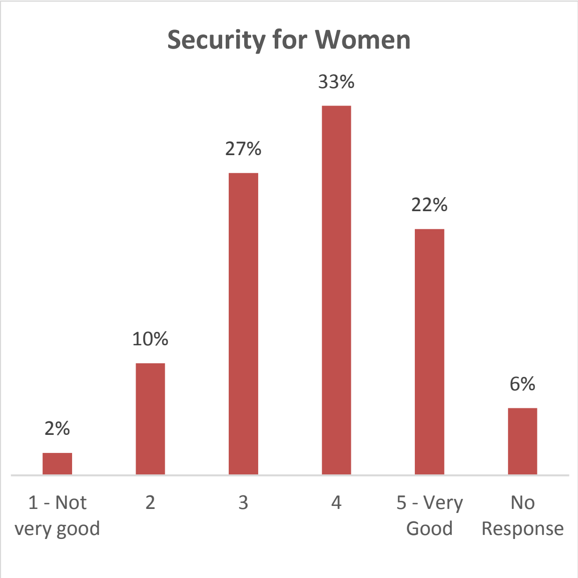



Fig. 85:


Fig. 86:

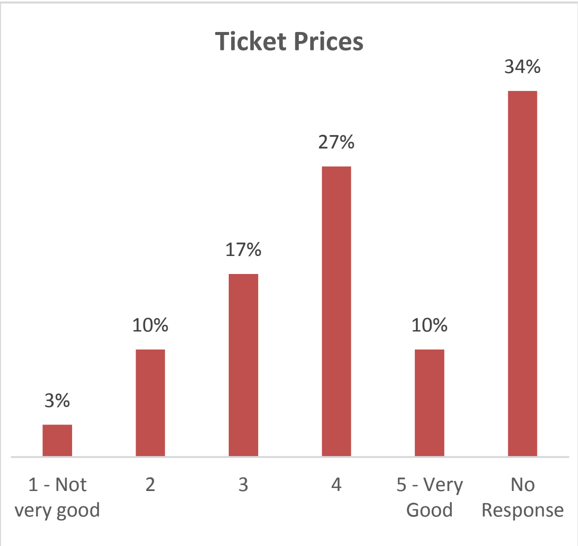



Fig. 87:

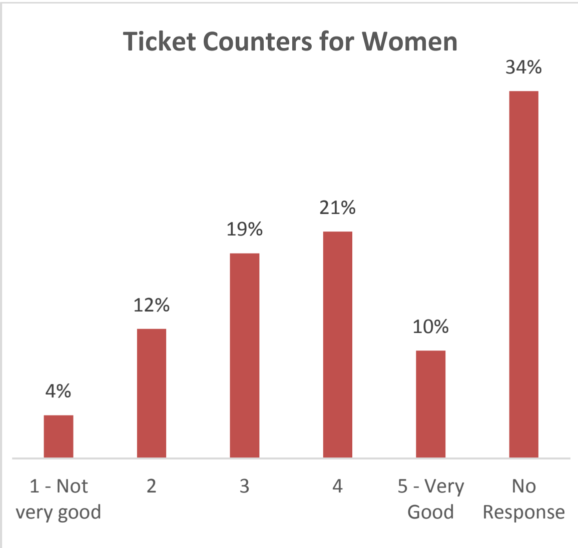



Fig. 88:

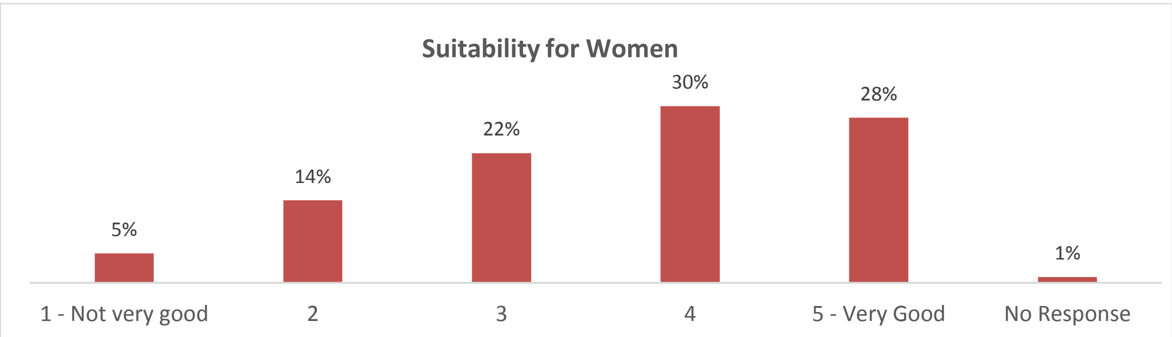


Fig. 89:

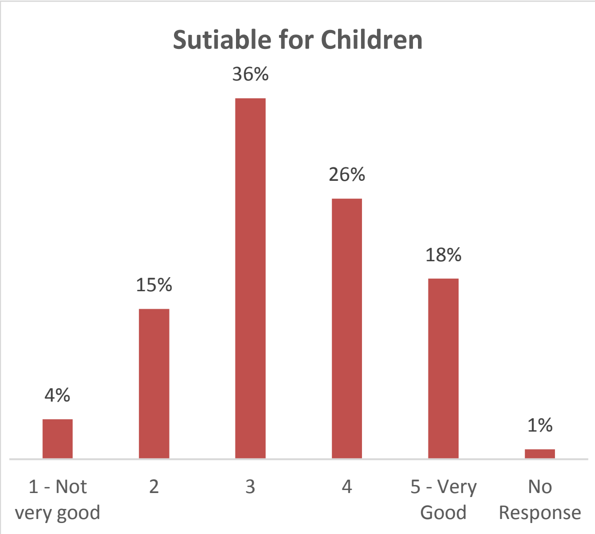



Fig. 90:

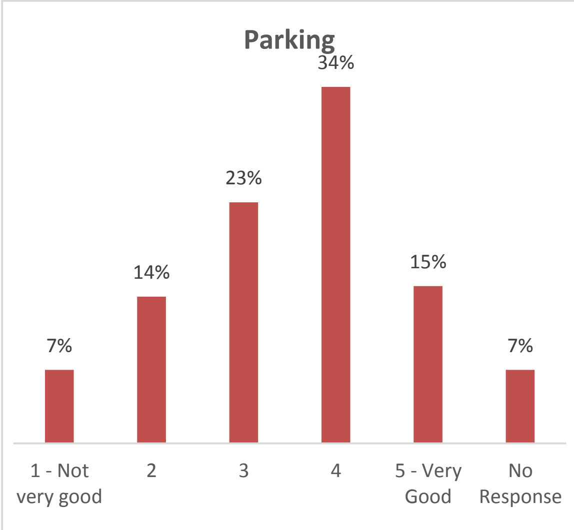



Fig. 91:

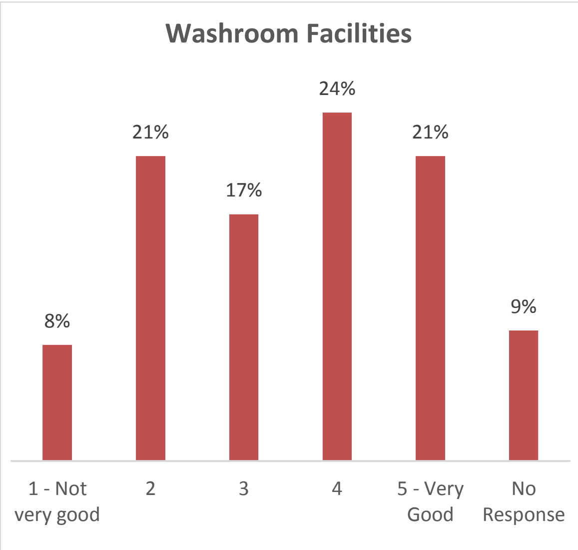



Fig. 92:

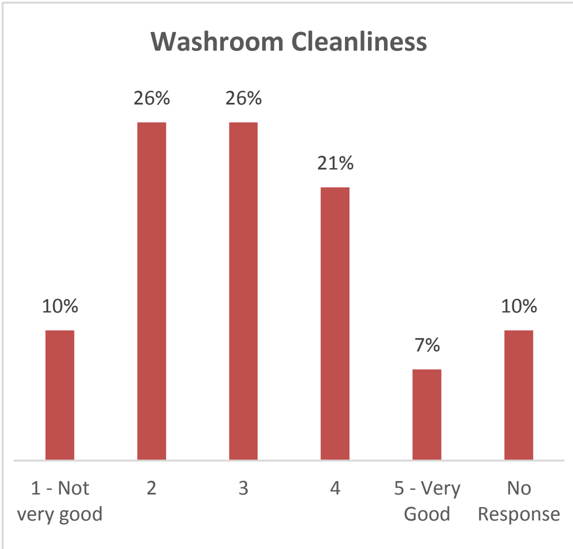
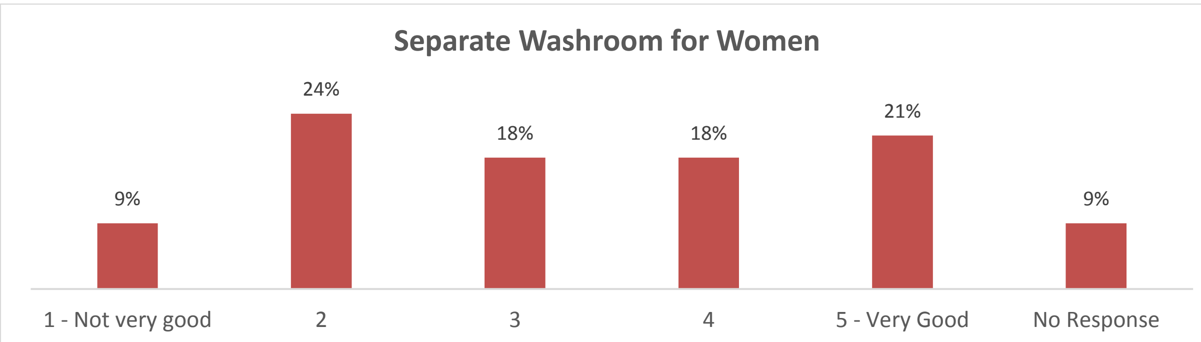



Fig. 93:

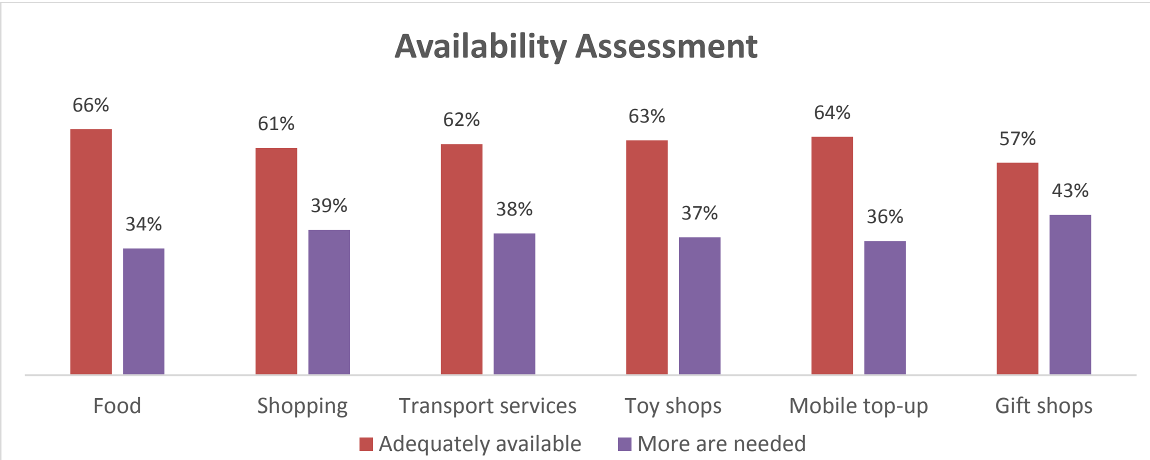


These ratings are highly revealing across a spectrum of different customer experiences. Generally, the overall satisfaction levels remain high, with 68 percent evaluating the general environment at the sites as good or very good. However, some aspects of the tourists' overall experiences received low ratings. Chief among these were the low ratings provided for general washroom facilities and their cleanliness, including the availability of washrooms for women. This implies that most sites are most likely dis-incentivizing customers as they cannot find suitable washroom facilities. Similarly, the facilities received lower aggregate satisfaction ratings on site suitability for children.

## Evaluation of Available Services:

Tourists were asked to assess the availability of selected services. As shown in the figure below, most services were assessed as adequately available, with around 30-40 percent respondents assessing these services as inadequate. Gift shops were identified as the least available kind of service in the area, which highlights potentially unmet demand in this service category. Across the board, improvements can be made by businesses to increase the availability of these services to customers.

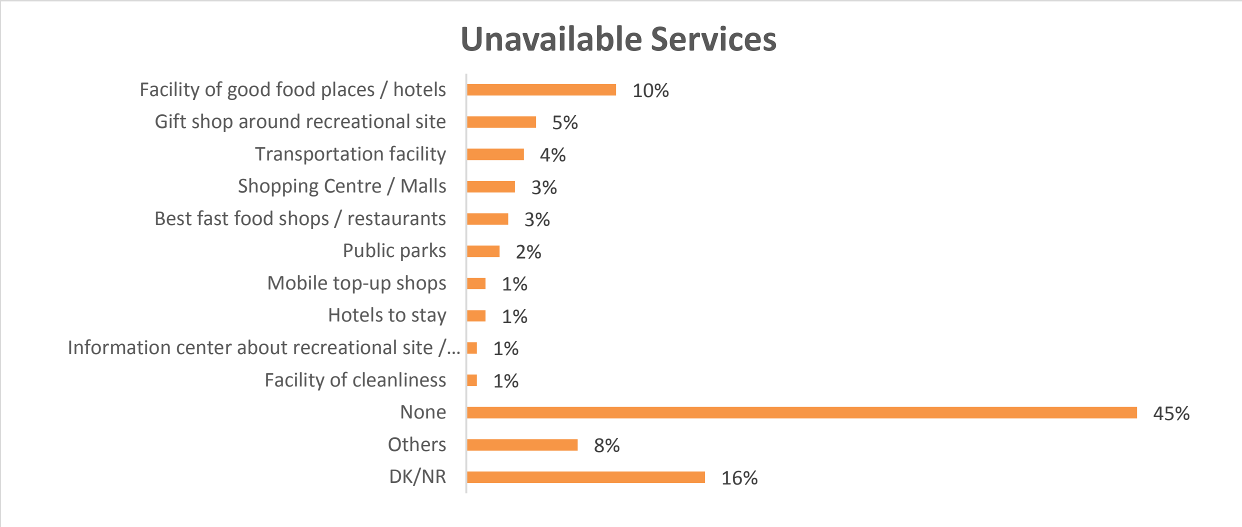
Fig. 94:




## Unavailable Service:

Following on from the preceding query, customers were asked regarding the availability of a wider range of services. The data shows that around 10 percent of all customers indicated that good food places/restaurants were unavailable around these sites. This finding can be juxtaposed with results discussed in Chapters and 2 and 3. Food Vendors/ Restaurants are the most common type of businesses within the 1KM radius of assessed sites. This implies that there is scope for improving the quality and range of services offered by these businesses – as a small proportion of customers judged these businesses as "unavailable". However, broadly speaking, customers found the services adequate and available in the vicinity of these tourist destinations.

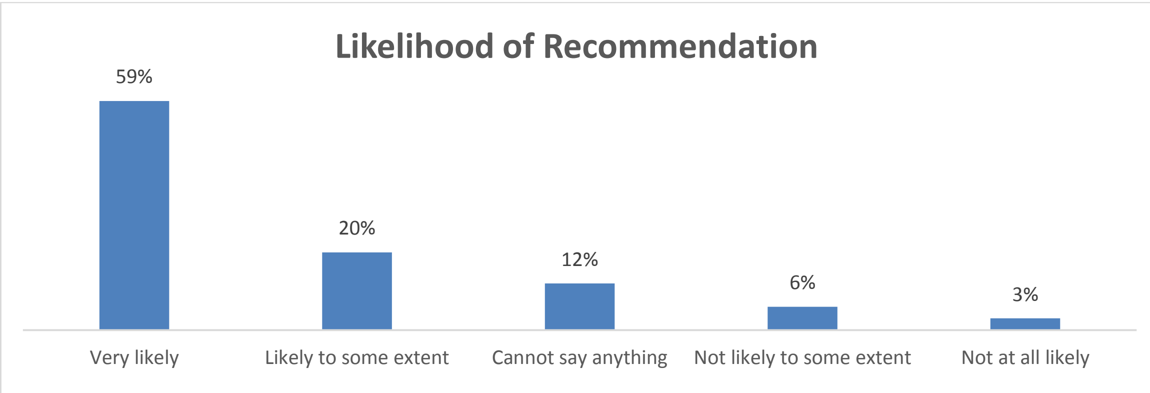
Fig. 95:




## Likelihood of Recommendation

Customers were asked to indicate whether they were likely to recommend the site of their visit to people in their networks. It is important to note, as discussed earlier in this chapter, most customers are arriving at these destinations through personal recommendations by friends and family members. The results on this question are shown in the Figure below:

Fig. 96:

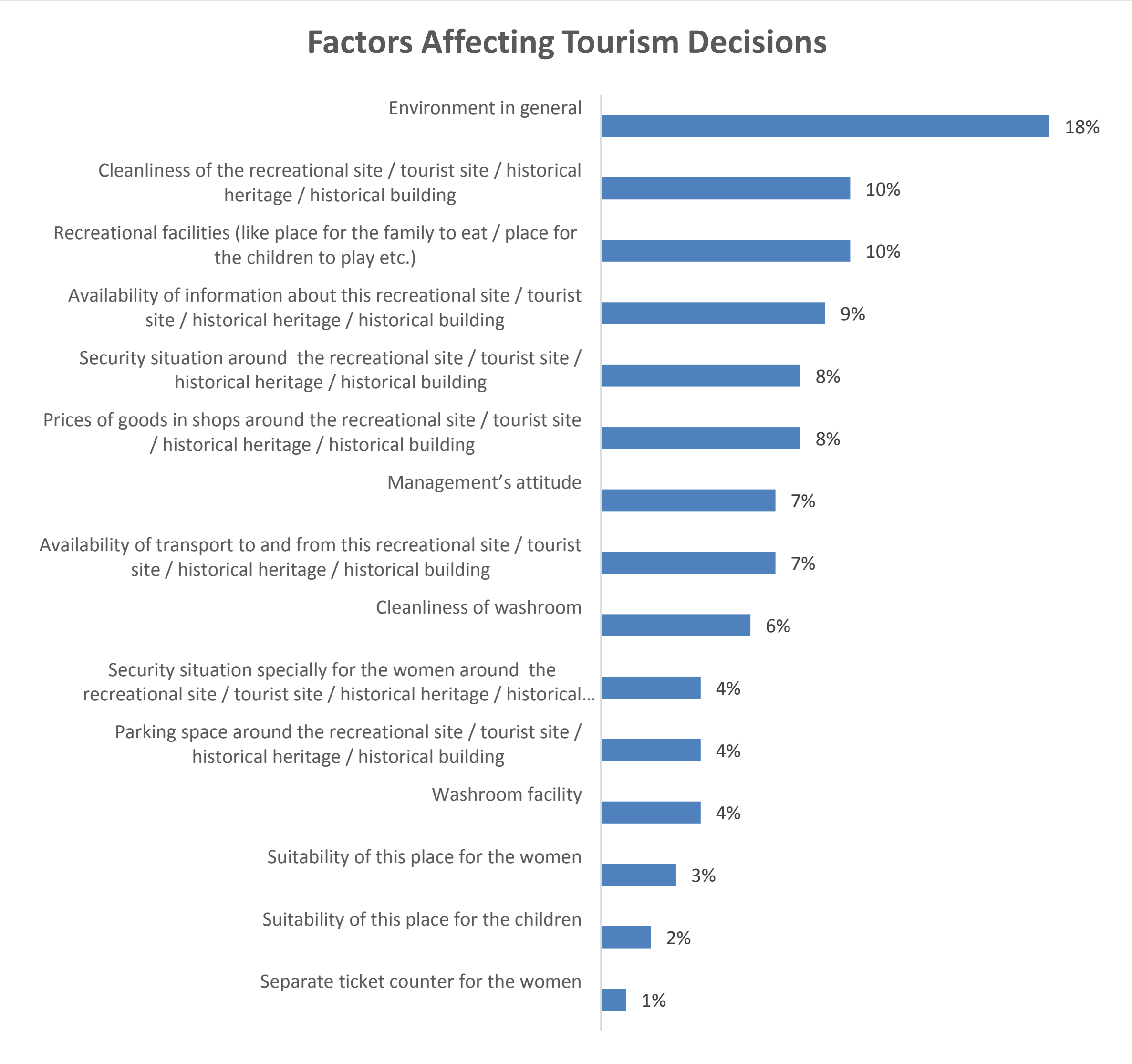



This finding supports the overall picture emerging from the demand-side study of the sites. Customers to these locations tend to base their decision on recommendations and advice provided by their peer and relational networks. When asked to indicate whether they would recommend the current site to other members of their networks, a substantial 79 percent indicated that they are very likely to somewhat likely to recommend the site and its attractions to their friends and family. This high likelihood is an indication of the healthy demand generated around these sites through personal recommendations. This demand can be further bolstered by removing low customer satisfaction evaluations on the indicators discussed in the preceding section.

## Factors Affecting Demand

Tourists were asked to indicate the factors that affect their decision-making vis-à-vis tourism. This query unpacks the issue of customer demand from a slightly different vantage point. The results are shown and discussed below:

Fig. 97:




These results indicate that a variety of factors affect tourists' decision-making around trips to these destinations. Of these, the general environment of the tourist destination was the most frequently cited factor. As seen previously in this Chapter, most tourist customers were satisfied with the general environment around tourist sites. Cleanliness and availability of recreational facilities (especially for children) are other important factors affecting tourist demand.

# Expenditure Patterns

Expenditure data was collected from customers to assess customer spending patterns.

**Average amount per tourist**

The results show that an average tourist spent a mean amount of around **150 PKR** at the tourist sites covered in this study. The expenditure does not include amount of money spent to reach and leave the site. However, it does cover expenses like on food, ticket and others.

**Distribution of money spent**

The highest expense from within different categories was found to be on food (an average of around 100 PKR) majority of which was spent on Cooked Food available in Restaurants followed by food and drinks available on stalls.

**Variation in reported expenditure**

It should be mentioned that there was great variation in expenditure data and a significant proportion of tourists interviewed for this study reported not having spent any money at the site itself and reported they have brought all food and other ancillaries from their home or town.

**Highest and lowest per person expenditure reported**

The highest amount of expenditure per person was recorded for Fort Munro in DG Khan at around 400 PKR, while the lowest was reported from Sakhi Saidan Shah at Zero.

**Note:** For the purpose of analysis of expenditure, Alms, Nazar and Nazranas, money spent on Langars was also not included. It is also pertinent to mention that the current exercise was planned to be an initial assessment and therefore the sample size used for estimating the expenditure per person was limited (N 50). Such small sample size limits the reliability of results and therefore caution must be observed in interpreting these values.

# Preliminary Evaluation of Business Valuation at the 23 Sites

Considering the limited scope and nature of the evaluation and lack of accurate estimation of traffic at the 23 sites (estimating the traffic at these 23 sites was not the mandate of the study), business valuation at the 23 sites is difficult. However, a basic number crunching exercise is done below.

We consider 3 scenarios of low, medium and high traffic at these sites of 100, 300 and 500 tourists per day.

The table below shows that in low scenario, per site total current business value can be estimated to be around 5 million, medium scenario 10 million and high scenario 54 million.

Table 13: **Average Business Valuation**

| | | Total Tourists per day for 23 sites | Estimated Business Valuation across the 23 sites per day (PKR) | Estimated Business Valuation across 23 sites Annually (PKR) | Average Business Valuation per Site per Year (PKR) |
|---|---|---|---|---|---|
| **Average Amount Spent per Person (PKR)** | 150 | | | | |
| **Low Scenario of average visitor per site** | 100 | 2300 | 345,000 | 125,925,000 | 5,475,000 |
| **Medium Scenario of average visitors per site** | 300 | 6900 | 690,000 | 251,850,000 | 10,950,000 |
| **High Scenario of average visitors per site** | 500 | 11500 | 3,450,000 | 1,259,250,000 | 54,750,000 |

If the current traffic flow estimation per site was available, the valuation could have been further improved.

An annual business per site of 5.4 million generated per day, would be a close approximation and matches with the annual revenue reported in the business survey of this study (which calculated most businesses to be doing an annual business of under 100,000 PKR and an average site having 25-30 businesses operating.

These figures point to although a low business activity around the sites, however when looked in the context of limited business investment and limited employment generation reported by businesses (an average investment of around 150,000 PKR), the figures look realistic and plausible. Moreover, there appears immense opportunity to improve the product and service offering around the sites to enhance the amount spent by visitors.

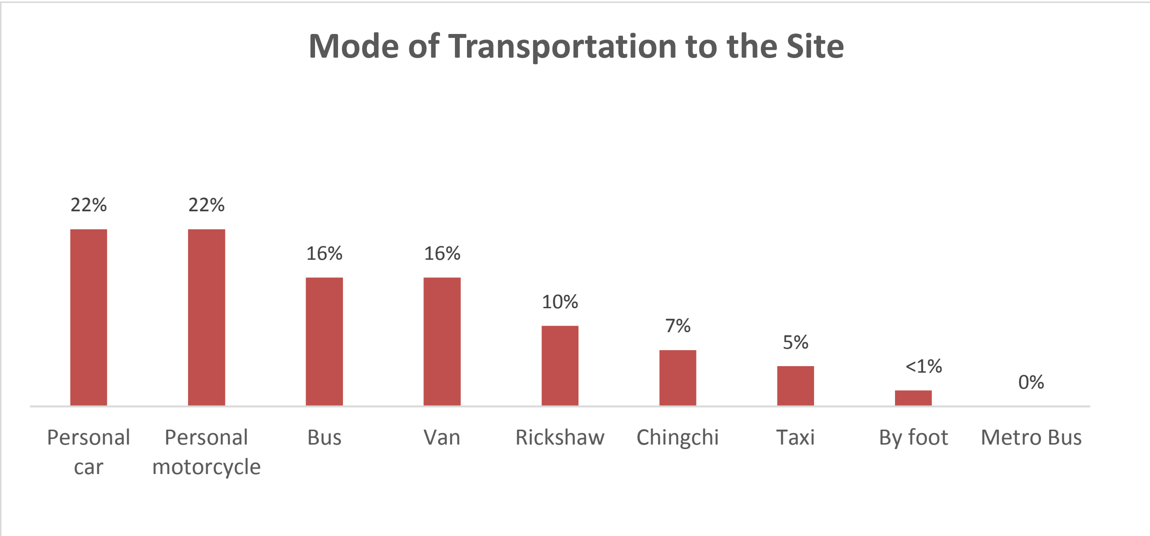
# Access and Transportation Modes

Transportation accessibility is a key determinant of tourism demand. Ease of access and availability of multiple modes of transportation tend to increase tourism flows. This data was collected to assess the mode of transportation and distances covered by tourists arriving at these sites.

## Mode of Travel to the Site:

As seen in the Figure below, the most common modes of transportation were personal cars and motorbikes – 22 percent of all respondents arrived at these sites through these modes. Another 16 percent of all customers arrived through public transportation: buses and vans. Given that transportation is the second highest incurred expenditure, this implies that groups of customers pay a median of PKR 500 on fuel or public transportation expense.

Fig. 98:

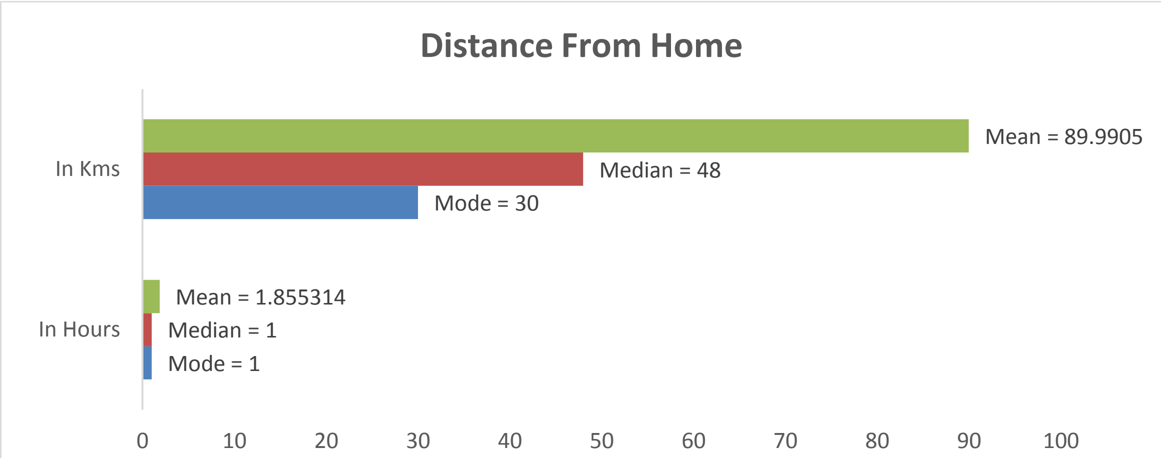



## Distance from Home:

The Figure below shows the distances covered by tourists arriving at the sites included in this study. The median distance covered by customers is 48 KMs, which takes around 1 hour for an average customer. This implies that most of the tourist flows are generated from close distances.

**PKR 10.41 per KM** expenditure

Fig. 99:


Distance From Home
In Kms
Mean = 89.9905
Median = 48
Mode = 30
In Hours
Mean = 1.855314
Median = 1
Mode = 1
0
10
20
30
40
50
60
70
80
90
100

# WOMEN & YOUTH IN LOCAL TOURISM

CHAPTER 6

# CHAPTER 6:
# WOMEN & YOUTH IN LOCAL TOURISM

Tourism is a dynamic industry whose impacts have been measured and mapped across multiple dimensions. Tourism's economic impact is the most widely measured impact vector in research on this industry. As discussed in the opening Chapter of this Report, substantial literature and investigative empirical studies have proven that tourism generates positive economic benefits for the local, regional, and national economic systems.

Recent studies have expanded the range and quality of discourse around tourism's impact. These impacts span across different socioeconomic dimensions. While the conventional view treats the economic impact of tourism on local economies in terms of economic values (revenue generated, tax contributions, business investments). Employment is another crucial area of impact. Tourism globally generates significant employment opportunities for local workers. And this contribution to the labour economy goes beyond wages and incomes. Tourism-based employment can be disaggregated to assess the quality and extent of impact on specific demographic groups: youth and women.

## Tourism and Employment:

Tourism is a dynamic industry, and this dynamism is most visibly reflected in the labour markets associated with tourism. As a sector, tourism incorporates and connects a range of sectors through its economic linkages, including, but not limited to:[26]

- Transport
- Tour Operations
- Tourism Destinations and Facilities
- Tour Guides
- Food and Entertainment
- Recreational Facilities
- Supply networks providing raw materials
- Conferences and business facilities
- Direct, small-scale services and products for tourists

These sectors are all linked by tourism, and the range of employment opportunities, wages, incomes, and productivity levels spans cross-sectoral dynamics. Given the breadth of industries operating within the tourism sector, there is a wide diversity in the quality and range of

[26] Michael Riley, Adele Ladkin, and Edith Szivas, "Tourism Employment – Analysis and Planning", *Channel View Publications*, UK, 2002.

occupational opportunities generated by tourism. These occupations differ markedly based on the size of the sector and industry, business structures, and fluctuations in consumer demand.[27] Tourism-based employment opportunities also incorporate process diversity. At the basic level, this process diversity includes cross-cutting aspects such as manufacturing tasks, retail tasks, customer-service tasks, service tasks, and information processing tasks.[28] Workers often have to combine these tasks in the occupations associated with the sector.

Tourism employment is directly affected by the range of occupations and sub-industries affiliated with the sector. In general, employment in the industry is highly accessible. This accessibility comes from the low-skill and technical requirements to enter the industry.[29] Tourism employment is also attractive because these low barriers to entry ensure greater accessibility. Therefore, tourism has the potential of absorbing a high rate of unskilled labour.[30] The corollary to this sectoral dynamic is that wages and incomes tend to be lower in the industry. Low skill and aptitude levels command average income levels. Depending on the sector's sophistication and market characteristics, earnings in the industry range from 69 percent to 99 percent of average national incomes.[31]

Labor flexibility in the tourism sector is also attractive to demographic groups that are significantly underrepresented in the larger labour force: youth and women. This study focused the data collection and segments of the analysis in this Report on the status of these demographic groups within the businesses operating around the selected sites.

## YOUTH EMPLOYMENT IN BUSINESSES AROUND SELECTED SITES

General research consensus on tourism indicates that the industry generates high level of employment opportunities for youth worldwide.[32] Given the range of occupations and low skills-level required for entering the market, tourism is a significant generator of youth employment in many economies. Labour market flexibility in tourism, especially low barriers to entry offer instant employment opportunities to youth either looking to break into the labour force, finding employment to support transition to other occupations and trades, or mobility between jobs.

[27] Ibid, p. 13.
[28] Ibid.
[29] Ibid, p. 23.
[30] Ibid.
[31] Ibid, 40.
[32] Andreas Walmsley, "Youth Employment in Tourism and Hospitality – A Critical Review", *Goodfellow Publishers Ltd.*, London, UK, 2016.

Three key features of employment patterns in tourism also affect youth employability. Tourism is a labour intensive sector, which requires high ratios of labour to capital.[33] In addition, due to low skill-intensity, the sector is also considered weak on labour productivity. Third, the sector is known for high labour turnover.[34] This turnover is explained by a high degree of part-time work and seasonal occupations. Many tourist sites experience seasonal or event-based surge in demand throughout the year, which creates demand for low-skilled labour. Young workers benefit from this structural feature of the tourism economy.

Research from across different tourism economies shows that more young workers find gainful employment in tourism businesses, compared with other sectors of the economy. While several methodological issues have been raised in the literature vis-à-vis measuring the dispersion of youth employment, data from cross-country contexts show high youth employment levels in the industry. The proportion of youth workers in European tourism businesses ranges from 9.8 percent in Spain to 50 percent in Iceland.[35] Similarly, youth employment in tourism businesses – especially food and accommodation- has been recorded at 31 percent in the UK, 40 percent in the U.S., 33 percent in Canada, and 39 percent in New Zealand.[36] Data from low and middle-income countries is hard to acquire and quality issues militate against making concrete inferences. However, from Pakistan, one publication of the Ministry of Labour (2008) indicated that youth employment in 'wholesale, retail trade, restaurant and hotels' was 14.5 percent.[37]

This study gathered data on the penetration of youth employment in the businesses around the selected sites. An overarching summary look at these numbers is given below:

[33] Ibid, p. 21.
[34] Ibid.
[35] Ibid, p. 27.
[36] Ibid.
[37] Ibid.

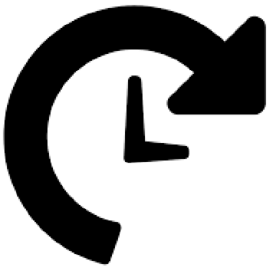
Fig. 102:

Average Number of Youth (< 25 years) Employed per Business

**1**

Total Full-time Youth Employed (< 25 years) in all listed Businesses

**1,006**



Total Part-time Youth Employed (< 25 years) in all listed Business

**31**

Average Male Trained Employees (< 25 years) in all listed Business

**1**

These results indicate that nearly all listed businesses employ, on average, at least one full-time male employee younger than 25 years old. Given that the total number of full-time male youth workers is greater than part-time workers; this indicates that the businesses around these sites are generating more full-time job opportunities for male youth than part-time jobs.

However, given the discussion in the preceding chapters, most businesses are small-scale with limited revenue generation daily and on an annual basis, low profitability, and high levels of inefficiency. This implies that the overall level of employment generated by these businesses remains lower than the potential size (customer flow, demand dynamics, and density of businesses) of the tourism economy around sites included in this study.

## WOMEN EMPLOYMENT IN BUSINESSES AROUND SELECTED SITES

This study also assessed main features of the employment opportunities and participation of women in the tourist labour force around the selected sites. Across the board, the results indicate that women are largely absent from the labour force in the industry. This finding is aligned with the overall levels of female labour force participation in the country. According to the World Bank's 2017 data, women's labour force participation in Pakistan is a low 22.4 percent.[38] This penetration is lower than both middle-income countries, as well as comparable economies in the region. This study affirms this finding, and shows that women are largely locked out of employment in tourism businesses around the selected sites.

While women have been reported to have higher comparative participation rates in the labour force engaged with tourism, they are generally under-represented as owners and entrepreneurs in this economy.[39] This study also confirms this feature of women's participation in tourist economies around the selected sites: none of the businesses listed around the sites were owned or operated by women.

An important insight from the customer profiling module of this study was that significant proportions of tourists to these sites gave low or mixed satisfaction ratings to facilities and services available for women around the sites. This implies that female customers are largely underserviced, and listed businesses can improve their offerings by taking on-board more female workers to make the experiences more satisfactory for tourists in these areas. Similarly, tourists declared that they found gift retail shops to be unavailable around the sites. This finding can be matched to the business survey module, where most business owners indicated that the highest level of female employment in their cities/regions is in the manufacturing of traditional handicrafts. There could be a significant and as yet under-explored opportunity for these women to become employed and/or open businesses selling traditional handicrafts as gift items directly to customers visiting these sites.

[38] World Bank, "Labour Force, female participation (% of total labour force)" 2017 https://data.worldbank.org/indicator/SL.TLF.TOTL.FE.ZS

[39] Linda K. Richter, "*Exploring the Political Role of Gender in Tourism*" in "*Global Tourism*", by William F. Theobald. Routledge, London, U.K. 2012.

# RECOMMENDATIONS

CHAPTER 7

# CHAPTER 7: RECOMMENDATIONS

This Report has cast an extensive look at the various business (supply) and customer (demand) dynamics of the selected tourist sites. Based on the three core data modules, the study allowed Gallup Pakistan to compare and rank all sites, as well as delve deeper into the varying dimensions of business environment and customer demand in the region. This in-depth look at all included sites has allowed us to come up with several recommendations.

Before enumerating and discussing these recommendations, the following SWOT analysis can be completed for all sites at an aggregate level.

## SWOT ANALYSIS:


Based off of this analysis, Gallup Pakistan can recommend the following actions for the World Bank team and its clients:

1. **Provide Financial Resources for Investments in Businesses**

As discussed extensively in Chapter 4 of this Report, most businesses around the selected sites have low investments in their current operations. Average investment across all businesses listed in this study amounted to PKR153,174. With an average operational life of 7 years across all sites, this implies that most businesses operating around the tourist destinations are small or micro enterprises, with limited investments in capital and operations. This finding is bolstered by the business owners' identification of lack of financial as a major business challenge. Targeted financial assistance to increase investments in the carrying capacity of these businesses can increase the scale and diversity of business operations around these sites.

2. **Mapping and Servicing Demand Segments**

Tourism demand is marked by significant variety and heterogeneity based on the diversity of consumer preferences.[40] Not all visitors to tourist destination are alike. This variation requires active scanning of consumer preferences and tastes, and responding appropriately with relevant products and services. The search for new segments and niche demand preferences provides continuous sources of growth in the tourism economy.[41] However, as the typology of businesses listed in this study shows, the majority of all businesses are concentrated in the accommodation and food markets. This implies that the business networks operating around these sites do not have a robust understanding of the variety of preferences that shape customer demand. Helping businesses map this market demand segmentation, and matching it with appropriate products and services would enhance the business potential, and expand employment intensity in tourism businesses.

3. **Technical Support and Advice for Existing Businesses**

This study has uncovered some intriguing features of the listed businesses: most businesses are small, employ few workers, and generate low revenues, profits, and incomes. Most businesses reported their average daily income as PKR 1,000, with very few businesses making more than PKR 2,000 outside of special event days. Critically, all businesses reported that as revenues increased, their profitability declines. This inverse relationship is best explained by operational inefficiency and cost overruns weaknesses. These businesses are likely hindered by their small-scale operations in achieving higher efficiency levels, and cutting/controlling costs to increase profits as revenues increase.

[40] Sara Dolnicar, "*Empirical Market Segmentation: what you see is what you get*", in "*Global Tourism*", by William F. Theobald. Routledge, London, U.K. 2012.

[41] Stanley C. Plog, "*Targeting Segments: more important than ever in the travel industry*", in "*Global Tourism*", by William F. Theobald. Routledge, London, U.K. 2012.

This insight calls for a dedicated program of technical business advice and support for businesses around the sites. Such a program can provide free operational advice to listed businesses to help them overcome a glaring structural weakness.

4. **Scaling-up & Growth Strategies**

The overwhelming majority of businesses surveyed and listed by Gallup are small-scale, micro enterprises. This implies limited scale of operations. These business respondents also noted a shortage of resources for their businesses. With technical support and improved access to resources, policymakers and program managers should look to enable these business to achieve scale and increase their carrying capacity. Small-scale businesses in tourism have carrying capacity issues i.e. a limit or ceiling on the maximum number of customers that can be serviced by an enterprise.[42] This then translates into limits on revenues, profits, and incomes. Scaling-up these businesses would be a critical step in bolstering the local tourism economy and expanding its positive impact for the region.

5. **Capitalizing on Word of Mouth Customer Trend: Build Brands**

Thriving and mature tourism businesses are able to understand their customers' needs in granular detail, and tailor their offerings accordingly. Some of the most successful brands in the industry are also able to scale their operations across different verticals within the travel market i.e. service consumer demands across different travel segments. In this study, most customers to these sites are first-time visitors who undertook the journey on recommendations provided by friends or family. This implies that for many of these businesses branding needs to take this market feature into account. Accordingly, two key interconnected developments need to take place within the business ecology of these sites: businesses need to grow upwards and beyond their current operational scales; and building brands that satisfy cross-cutting consumer needs. At present most tourists around these sites arrive on single-day visits. Businesses need to build stronger brands off of diverse services and products to extend these trips.

6. **Invest in Infrastructure**

A key finding from the demand and supply-side modules is that businesses and customers view the public infrastructure lacking. For businesses, general investments need to be made in the public infrastructure to improve the business environment, and pull greater tourist flows through these sites. For tourist visitors, availability of public

[42] Peter W. Williams and Alison Gill, "*Addressing Carrying Capacity Issues in Tourism Destinations through Growth Management*", by William F. Theobald. Routledge, London, U.K. 2012.

washrooms and recreational facilities are missing elements of the tourist experience. Investments in building these public infrastructure facilities can act as a multiplier for business growth in the region.

7. **Decrease Regulatory Burden**

Most tourist sites in Punjab are subject to a complex web of overlapping governance jurisdictions from different government authorities, as well as site management, and local influential e.g. *pirs*. A third of all businesses (36 percent) reported that regulatory burdens were a challenge for expanding their businesses, as well as the current business performance. Anecdotally, heavy regulatory control over tourist sites tend to limit and erode business diversity, as well as profits. If a high proportion of business profits and revenues are carved off as rents by regulatory controllers and other agents with influence, it severely weakens the ability of businesses to fully exploit their potential and achieve economies of scale. Easing of the regulatory burden through simplifying jurisdictional control over sites, especially religious and adventure/sports sites can allow local businesses to expand operations, improve performance, better serve tourists, and generate greater employment opportunities for youth and women in the local communities.

8. **Opportunities for Women Entrepreneurship**

This study shows that women are generally missing from the landscape as employees or owners in the listed tourist businesses. However, business intelligence from owners shows that women in the wider region are engaged in the informal economy, and crucially activities like, manufacturing traditional handicrafts. The customer module of this study indicated that consumers felt that the sites did not have enough adequate gift shops – likely a reference to non-availability of traditional items for sale. This opens a window of opportunity for women in the wider economy: they should be supported with financial and technical assistance to step-in and fill the gaps in products and services being currently offered to customers.

9. **Continued Research**

Data form this study shows that there is room for expanding the scope of inquiry to include vital information on various dimensions of the tourist economy. For example, detailed information on business practices, range of products and services, pricing and branding strategies, legal and regulatory hurdles, labour market practices etc. would help elucidate future programs designed to accelerate inclusive growth in the tourism economy.

## 10. Improve Law and Order

Deterioration in the general security situation, and more specifically, the law and order conditions (rates of crime) around these sites is critical to the sustainability of the tourist economy around these sites. A significant proportion of business owners reported law and order/security as one of the weak areas of their general business environment. This needs to be rectified to improve business confidence, and crucially, preserve and expand tourist flows to these sites.

## 11. Formalize Businesses

A large proportion of businesses listed in this study are sole proprietorships, with no linkage with the formal economy, or membership in representative business organizations. This further depresses the scope of operations and the potential socioeconomic benefits generated by these enterprises. Therefore, it is vital to start formalizing these businesses to improve their access to formal business services provided by the Government of Punjab, financial resources (for investments in business up-scaling), and collective interest representation at the provincial level.

## 12. Sustainable Tourism

As discussed briefly in Chapter 1, tourism generates multidimensional impacts. The sector can only benefit the local economy, culture, environment and society, if all these diverse impact channels are properly accounted for, assessed, and worked on through targeted policies. There is a need around these sites to improve the sustainability of the tourism economy, and the society and environment attached with these sites. The diagram below illustrates this insight:[43]

[43] Peter E. Murphy and Garry G. Price, "*Tourism and Sustainable Development*", in "*Global Tourism*", by William F. Theobald. Routledge, London, U.K. 2012.


Social Goals
community benefits
participation
education
health
employment
visitor satisfaction
Economic Goals
economic benefits to local and other stakeholders
economically viable industry
Community Based Economics
SUSTAINABLE TOURISM
Conservation with Equity
Integration of Environment with Economy
resource benefits
minimal resource degradation
acceptance of resource values
matching of supply and demand
Environment and Resource Goals

# SITE-BASED ANALYSIS & SCORECARD

CHAPTER 8

GALLUP PAKISTAN
Affiliated with Gallup International
Pakistan's Foremost Social Research Lab

# CHAPTER 8:
# SITE-BASED ANALYSIS & SCORECARD

This study collected extensive and detailed data on the business dynamics and operational structures around selected sites. In addition, data was collected from tourists from these sites on their overall evaluation of the experience of visiting these sites.

Using a composite methodology, Gallup has constructed a report card for each site. These indicators are chosen arbitrarily, but they reflect the core dimensions of supply and demand-side dynamics of this study, as well as the core objectives set by the client. Details on these indicators are shown in the Table below:

Table 14: **Site-Based Analysis and Scorecard**

| Report Card - Summary of Key Findings from the Evaluation at each site | | | |
|---|---|---|---|
| | **Indicator** | **Results** | **Rank out of 23** |
| BUSINESS PROFILE | Average Investment by a business | Rs. | |
| | Total businesses found at site | N | |
| | Average total employed per business | N | NA |
| | Youth | N | |
| | Women | N | |
| | Average age of business | Years | |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | % | |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | | N/A |
| | Business registered or unregistered | % | N/A |
| | Participation in Business Association | % | N/A |
| | Current State of Business (improving or deteriorating) | % | |
| | Expansion Plans | % | |
| | Business expectation in the next year | % | |
| | Challenges faced in business expansion (% citing lack of business finance) | % | |
| | Structure of business | % | N/A |
| TOURIST PROFILE | First time visitor | % | N/A |
| | Travel experience (Group or Individual) | % | N/A |
| | Average Distance travelled to reach site | Km | N/A |
| | Time taken on average to reach site | Hours | N/A |
| | Mode of Transportation to Site | | N/A |
| | Planned duration of stay | Hours | N/A |
| | District from which tourist is coming from | % | N/A |
| | Source of knowledge about site | % | N/A |
| | Overall satisfaction rating (respondents rating 5) | % | |
| | Satisfaction with management attitude respondents rating 5) | % | |
| | Likelihood of recommendation | % | |
| | Suitability for women (% citing not suitable) | % | |

# Derawar Fort – Bahawalpur

With its landmark architecture symbolizing centuries of grandeur, the Derawar Fort is a standout attraction in the Cholistan desert. Despite its awe-inspiring allure, however, it seems on the verge of collapse due to the neglect of authorities. The Derawar Fort was first built in the 9th century under the kingship of Rai Jajja Bhati, a Hindu Rajput from Jaisalmir in India's Rajasthan state. However, it was the Nawab of Bahawalpur, Sadeq Mohammad Khan I, who captured the fort in 1733 and had it rebuilt to how it looks today: 30-metre-high bastions surround the fort, along with walls that span over 1.5 kilometres. In the scorching summer of the Cholistan desert, the fort's red-bricked facade seems to glow with the heat and is visible for miles[44]. Inside Derawar Fort, a number of buildings provided quarters for Nawab's army. The quarter, standing deserted inside the fort, are turning to dust. There are shrines of four pious Muslims near Derawar Fort. The Derawar Mosque, built in 1844 A.D, has four minarets and three domes and is an exact replica of Moti Mosque at Red Fort Dehli.

Derawar Fort is located 100 kilometers (62 miles) from Bahawalpur, Pakistan. The fort is a square with each wall 204.8 meters (672 feet) in length. Vertically, the walls are 30 meters (98.4 feet) high and the total circumference of the Fort's walls is 1500 meters (4921.5 feet). The gate of the fortress is on its southern side and can be reached by a winding ramp. Most of the bastions of fort adorn geometric designs made by burnt bricks. The strong fort standing over the semi desert is visible from miles around[45].

Derawar fort was built by Rai Jajja Bhatti, a Rajput ruler of the Bhatti clan. The fort was built in the 9th century AD as a tribute to Rawal Deoraj Bhatti, a Rajput sovereign king of the Jaisalmer and Bahawalpur areas who had his capital at Lodhruva. The fort was initially known as *Dera Rawal*, and later referred to as *DeraRawar* which, with the passage of time, came to be pronounced as *Derawar*- its present name.

[44] https://www.dawn.com/news/1311657
[45] http://www.pakistantoursguide.com/derawar-fort.html


A shop near Derawar Fort

In the 18th century, the fort was taken over by Muslim Nawabs of Bahawalpur from the Shahotra tribe. It was later renovated by Abbasi rulers, but in 1747 the fort slipped from their hands owing to Bahawal Khan's preoccupations at Shikarpur. Nawab Mubarak Khan took the stronghold back in 1804. This historically significant fort presents an enormous and impressive structure in the heart of the Cholistan desert, but it is rapidly deteriorating and in need of immediate preventative measures for preservation[46].

[46] https://en.wikipedia.org/wiki/Derawar_Fort

Table 15: **Derawar Fort - Bahawalpur**

| Report Card - Summary of Key Findings from the Evaluation: Derawar Fort | | | |
|---|---|---|---|
| | | **Results** | **Rank out of 23** |
| BUSINESS PROFILE | Average Investment by a business | 20,700 PKR | 22 |
| | Total businesses found at site | 10 | N/A |
| | Average total employed per business | 2 | NA |
| | Youth | 1 | |
| | Women | 0 | |
| | Average age of business | 1 years | 13 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 10% | 13 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Lack of investment<br>2. Unavailability of basic facilities like electricity/water supply/ telephone/roads etc.<br>3. Law and Order/Security concerns | N/A |
| | Business registered or unregistered | Registered 0% | N/A |
| | Participation in Business Association | 100% unassociated | N/A |
| | Current State of Business (improving or deteriorating) | 70% improving | 9 |
| | Expansion Plans | 100% intend to expand | 1 |
| | Business expectation in the next year | Improve 100% | 1 |
| | Challenges faced in business expansion (% citing lack of business finance) | 90% | 3 |
| | Structure of business | Single proprietorship 90%<br>Partnership 10%<br>Limited company 0% | N/A |
| TOURIST PROFILE | First time visitor | 82% | N/A |
| | Travel experience (Group or Individual) | Group 82%<br>Alone 18% | N/A |
| | Average Distance travelled to reach site | 70 km | N/A |
| | Time taken on average to reach site | 1.5 hrs | N/A |
| | Mode of Transportation to Site | Personal Car 64% | N/A |
| | Planned duration of stay | 2.6 hrs | N/A |
| | District from which tourist is coming from | 100% Bahawalpur | N/A |
| | Source of knowledge about site | Family 64%<br>Friends 45% | N/A |
| | Overall satisfaction rating (respondents rating 5) | 9% | 16 |
| | Satisfaction with management attitude respondents rating 5) | 9% | 14 |
| | Likelihood of recommendation | 91% | 6 |
| | Suitability for women (% citing not suitable) | 86% | 1 |

## Shrine of Hazrat Syed Ahmed Sultan Sakhi Sarwar – D.G. Khan

The shrine of Sakhi Sarwar, a 13th century saint, is a major hallmark of Dera Ghazi Khan. Devotees from different sects and religions regularly visit the shrine located at the foothills of the famous Sulaiman Range[47]. The tomb of Hazrat Sakhi Sarwar was built in the 13th century in a small village named Muqam. Later, Mughal king Zahir-ud-din Muhammad Babur amended his tomb. It is a unique building of Mughal architecture. Thousands of people from all over the Subcontinent visit to take part in the Annual Celebrations of the birth of Sakhi Sarwar in March, every year.

Sangh Mela, a Vaisakhi fair during March and April, is celebrated in Sakhi Sarwar by people coming from Jhang and Faisalabad since centuries. This festival is celebrated by Hindus and Muslims especially at the time of wheat harvesting- at some places, this festival is also referred to as Basant. Throughout history, a large number of followers coming from different religions became the followers of Sakhi Sarwar. In the 1911 census of India, 79,085 Sikhs reported to be the follower of Sakhi Sarwar.

Annual fairs in other parts of the country, such as the annual Dhaunkal fair, Jhanda fair in Peshawar, and Kadmon fair in Anarkali, Lahore, are also connected with Sakhi Sarwar. Many villages in the Indian Punjab also home shrines of Sakhi Sarwar, more popularly referred to as Lakha Data Pir across the border[48].

[47] https://www.dawn.com/news/1100057

[48] https://pakistaniinformation.wordpress.com/hazrat-sultan-sakhi-sarwar/

Table 16: **Shrine of Hazrat Syed Ahmed Sultan Sakhi Sarwar – D.G. Khan**

**Report Card - Summary of Key Findings from the Evaluation: Shrine of Hazrat Syed Ahmed Sultan Sakhi Sarwar**

| | | Results | Rank out of 23 |
|---|---|---|---|
| BUSINESS PROFILE | Average Investment by a business | 208,325 PKR | 6 |
| | Total businesses found at site | 55 | NA |
| | Average total employed per business | 2 | NA |
| | Youth | 1 | |
| | Women | 0 | |
| | Average age of business | 11 years | 3 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 36% | 8 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Law and Order/Security concerns<br>2. Lack of resources<br>3. Poverty | NA |
| | Business registered or unregistered | Registered 44% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 72% improving | 8 |
| | Expansion Plans | 12% intend to expand | 16 |
| | Business expectation in the next year | Improve 60% | 12 |
| | Challenges faced in business expansion (% citing lack of business finance) | 80% | 5 |
| | Structure of business | Single proprietorship 92%<br>Partnership 4%<br>Limited company 4% | NA |
| TOURIST PROFILE | First time visitor | 48% | NA |
| | Travel experience (Group or Individual) | Group 64%<br>Alone 36% | NA |
| | Average Distance travelled to reach site | 103 km | NA |
| | Time taken on average to reach site | 2.4 hrs | NA |
| | Mode of Transportation to Site | Van 34% | NA |
| | Planned duration of stay | 7.7 hrs | NA |
| | District from which tourist is coming from | 50% D.G Khan | NA |
| | Source of knowledge about site | Friends 88%<br>Family 82% | NA |
| | Overall satisfaction rating (respondents rating 5) | 94% | 2 |
| | Satisfaction with management attitude respondents rating 5) | 50% | 5 |
| | Likelihood of recommendation | 90% | 7 |
| | Suitability for women (% citing not suitable) | 0% | 15 |

# Rohtas Fort – Jhelum

Rohtas Fort is a garrison fort built by the great Afghan king, Sher Shah Suri during the 1540s. The fort measures approximately 4 km in circumference displaying the first successful amalgamation of Pukhtun and Hindu architecture in the sub-continent. Sher Shah Suri named Qila Rohtas after the famous Rohtasgarh Fort in Shahabad district near Baharkunda, Bihar which he captured from the Raja of Rohtas Hari Krishan Rai in 1539. Rohtasgarh, situated on the upper course of the river Son, 20 37' N and 85 33'E, was built by Harish Chandra of the Solar dynasty and was named after his son, Rohitasva.

Sher Shah constructed Qila Rohtas to block Emperor Humayun's return to India after defeating him in the Battle of Kanauj. The building of the fort started in 1541 with Todar Mal Khatri, the revenue minister in charge of the project. Sher Shah Suri died before the completion of the magnificent structure. UNESCO designated Qila Rohtas a World Heritage Site in 1997. The Fort served to suppress the Gakhars of Potohar, allies of Humayun who refused to give their allegiance to Sher Shah Suri. The Gakhars made a feeble retort by building some fortifications near the village of Sultanpur, which still remain today.

Ten years after Sher Shah's death and the end of the Suri dynasty, Emperor Humayun returned to rule India for another 15 years. When Humayun returned, the Governor of Rohtas Tatar Khan Kasi fled. The fort had never been popular with the Mughals because of its military character. The later Mughals, particularly, seem to have made no use of the fort.

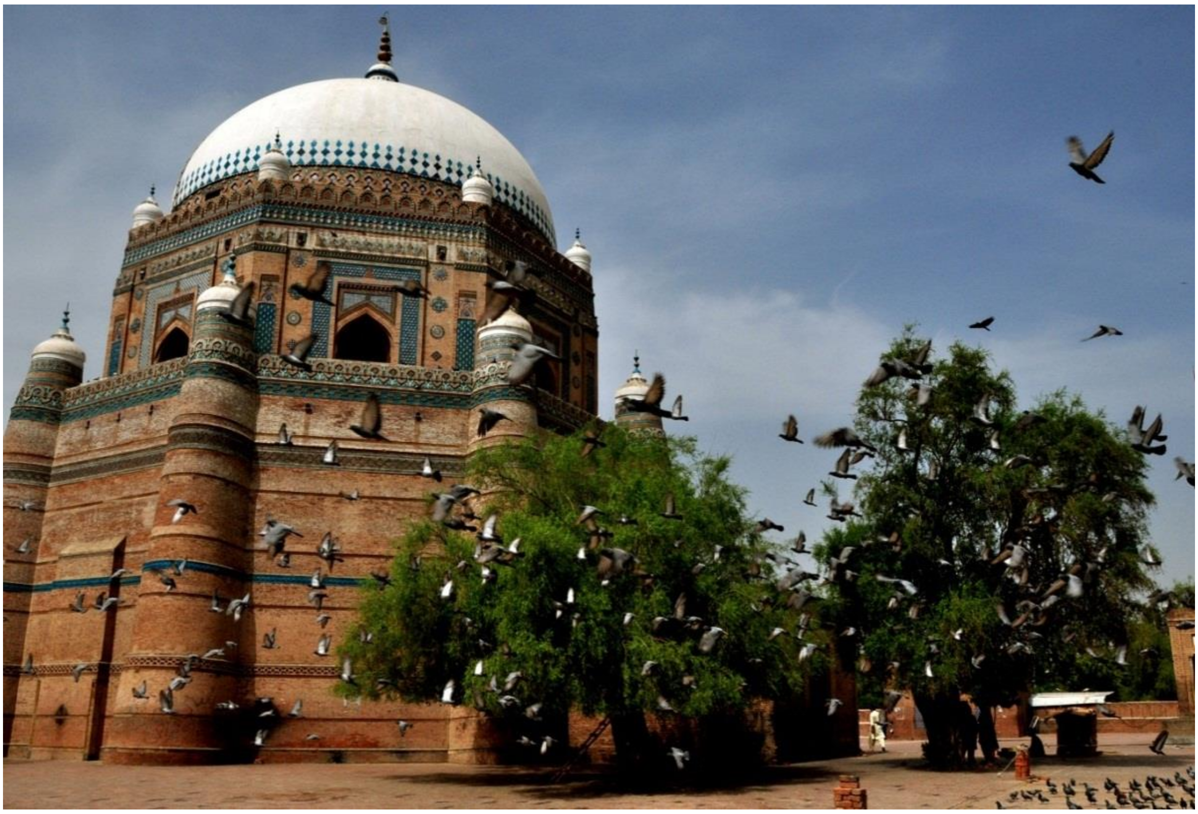
Rohtas Fort has 12 gates, all of which are built in ashlar stone. Most of the fort remains in excellent preservation. The central archway of the Chandwali Gate has been rebuilt recently, constituting the only portion of the fort reconstructed from scratch. In early 2005, seepage, heavy rains, and general neglect caused the left inner face of the Talaqi Gate to collapse, and the right flank and foundation to become detached from the original structure. The Gatali Gate forms one of the original entrances to Rohtas. Over time, its right bastion and supporting wall have collapsed as a result of permeated rainwater and the erosion of its foundations[49].

[49] http://www.newworldencyclopedia.org/entry/Rohtas_Fort

Table 17: **Rohtas Fort – Jhelum**

| Report Card - Summary of Key Findings from the Evaluation: Rohtas Fort | | | |
|---|---|---|---|
| | | **Results** | **Rank out of 23** |
| BUSINESS PROFILE | Average Investment by a business | 51,667 PKR | 20 |
| | Total businesses found at site | 8 | NA |
| | Average total employed per business | 1 | NA |
| | Youth | 0 | |
| | Women | 0 | |
| | Average age of business | 13 years | 1 |
| | Average annual revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 33% | 9 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Inflation<br>2. Unavailability of basic facilities like electricity/water supply/ telephone/roads etc.<br>3. Transport issues | NA |
| | Business registered or unregistered | Registered 0% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 100% improving | 1 |
| | Expansion Plans | 100% intend to expand | 1 |
| | Business expectation in the next year | Improve 65% | 11 |
| | Challenges faced in business expansion (% citing lack of business finance) | 67% | 11 |
| | Structure of business | Single proprietorship 100%<br>Partnership 0%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 93% | NA |
| | Travel experience (Group or Individual) | Group 81%<br>Alone 19% | NA |
| | Average Distance travelled to reach site | 115 km | NA |
| | Time taken on average to reach site | 1.9 hrs | NA |
| | Mode of Transportation to Site | Bus 33% | NA |
| | Planned duration of stay | 4.26 hrs | NA |
| | District from which tourist is coming from | 40% Jhelum | NA |
| | Source of knowledge about site | Television 98%<br>Radio 98% | NA |
| | Overall satisfaction rating (respondents rating 5) | 47% | 12 |
| | Satisfaction with management attitude (respondents rating 5) | 14% | 13 |
| | Likelihood of recommendation | 74% | 11 |
| | Suitability for women (% citing not suitable) | 37% | 5 |

## Tomb of Shah Rukn-e-Alam – Multan



Shaikh Rukn-i-Alam (Rukn-al-Din) died on the 7th of Friday (735/3 Jamadial-Awwal, January 1335). He was buried in the mausoleum of his grandfather, according to his own will. After some time, however, his coffin was transferred to the present mausoleum. It was constructed, according to popular belief, by Ghiyas-al-Din Tughluq (1340-1350) during the days of his governorship of Depalpur, but was given by Feruz Shah Tughluq to the descendants of Shah Rukn-I-Alam for the latter's burial. The mausoleum of Rukn-I-Alam has been admired by not only the travellers and chroniclers but also by the art-historians and archaeologist who wrote the architectural history of the subcontinent.

The mausoleum was constructed with burnt brick, supported by timber framing, and decorated with tile faced bricks and wood beams. The whole structure is divided into three stories. Over the second story is a smaller Octagon, leaving a narrow passage all around the place, above which stands a hemispherical dome. As the tomb is standing on a high artificial mound, it is visible from about 45 kilometers. Most of its patterns are geometric-created by arranging the glazed tiles- a living testimony to creative genius of their designers. The building is also decorated with floral and calligraphic patterns. In the 1970s, the mausoleum was thoroughly repaired and renovated by the Auqaf Department of the Punjab Government. The entire glittering glazed interior is the result of new tiles and brickwork done by the Kashigars of Multan, demonstrating the talents and dexterity of local craftsmen.

The Mazar of Rukn-i-Alam is the glory of Multan. It is the most prominent sight when approaching the city from any side and its large dome can be seen from miles all around. The tomb is located on the south-West side of the Fort premises. This elegant building is an octagon, 51 feet 9 inches in diameter internally, with walls 41 feet 4 inches high and 13 feet 3 inches thick, supported at the angles by sloping towers. Over this is a smaller octagon, 25 feet 8 inches on the exterior side, and 26 feet 10 inches high, leaving a narrow passage all-round the top of the lower story for the Moazzan, or the public caller to prayers. The whole is surmounted by a hemispherical dome. The total height of the building, including a plinth of 3 feet, is 100 feet. The total height above the road level is 150 feet. This contributes materially to the majestic and colossal appearance of the tomb, making it the most prominent object of view to the visitors. Besides its religious importance, the mausoleum is also of considerable archaeological value as its dome is reputed to be the second largest in the world after 'Gol Gumbad' of Bijapur, India.

The mausoleum is built entirely of red brick, bounded with beams of Shisham wood, which have now turned black with the passage of time. The whole of the exterior is elaborately ornamented with glazed tile panels, string courses and battlements. Dark blue, azure, and white are some of the colors used extensively, contrasted with the deep red of the finely polished bricks, yielding a result that is both effective and pleasing. The patterns are raised from half an inch to two inches above the background. This mode of construction must have been very difficult but its aesthetic effect is undeniable- uniting the variety of colors with the light and shades of a raised pattern[50]

Every year in the month of April, the Urs of this Rukn-i-Alam is celebrated with great respect.

[50] https://www.tripadvisor.com/ShowUserReviews-g317117-d6782517-r509395641-Tomb_Shah_Rukne_Alam-Multan_Punjab_Province.html#

Table 18: **Tomb of Shah Rukn-e-Alam - Multan**

| Report Card - Summary of Key Findings from the Evaluation:Tomb of Shah Rukn-e-Alam | | | |
|---|---|---|---|
| | | **Results** | **Rank out of 23** |
| BUSINESS PROFILE | Average Investment by a business | 78,368 PKR | 17 |
| | Total businesses found at site | 51 | NA |
| | Average total employed per business | 2 | NA |
| | Youth | 1 | |
| | Women | 0 | |
| | Average age of business | 10 years | 4 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 28% | 10 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Lack of investment<br>2. Inflation<br>3. Poverty | NA |
| | Business registered or unregistered | Registered 28% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 68% improving | 10 |
| | Expansion Plans | 28% intend to expand | 13 |
| | Business expectation in the next year | Improve 68% | 10 |
| | Challenges faced in business expansion (% citing lack of business finance) | 76% | NA |
| | Structure of business | Single proprietorship 92%<br>Partnership 4%<br>Limited company 4% | NA |
| TOURIST PROFILE | First time visitor | 33% | NA |
| | Travel experience (Group or Individual) | Group 45%<br>Alone 55% | NA |
| | Average Distance travelled to reach site | 258 km | NA |
| | Time taken on average to reach site | 5.3 hrs | NA |
| | Mode of Transportation to Site | Bus 45% | NA |
| | Planned duration of stay | 11 hrs | NA |
| | District from which tourist is coming from | 45% Multan | NA |
| | Source of knowledge about site | Friends 96%<br>Family 67% | NA |
| | Overall satisfaction rating (respondents rating 5) | 96% | 1 |
| | Satisfaction with management attitude respondents rating 5) | 63% | 2 |
| | Likelihood of recommendation | 96% | 3 |
| | Suitability for women (% citing not suitable) | 6% | 12 |

# Tomb of Shah Shams Tabriz – Multan

Shah Shams-ud-Din mausoleum is located on Baba Safra Road and is half a mile to the east of the Fort site near Aam-Khas Garden, Multan, Pakistan. Also known as Shah Shams Sabzwari or Shah Shams Tabrez, Shams-ud-Din is credited as the spiritual instructor of MawlānāJalā ad-Dīn Rumi. According to contemporary Sufi tradition, Shams Tabrizi mysteriously disappeared from Konya, Turkey, where he spent several years guiding Rumi on his spiritual journey. There are several tombs that claim to house the body of the Sufi Saint. This particular tomb in Multan is 39 feet high and has been constructed with ornamental glazed tiles[51].

The shrine is frequented by visitors for its spiritual associations.

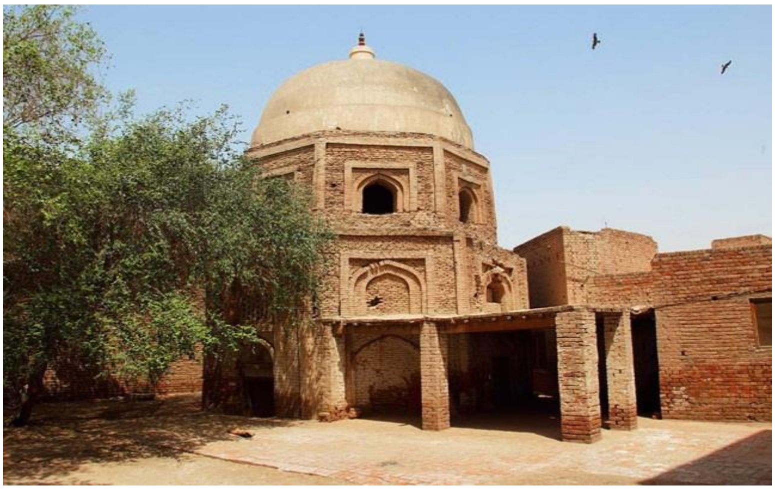

Small shop at Mausoleum of Shah Shams Tabriz, Multan

[51] http://travel.hamariweb.com/Asia/Pakistan/Multan/Places-to-Visit/Shah-Shams-Tabrez-(Mausoleum)

Table 19: **Tomb of Shah Shams Tabriz – Multan**

| Report Card - Summary of Key Findings from the Evaluation: Tomb of Shams Tabriz | | | |
|---|---|---|---|
| | | **Results** | **Rank out of 23** |
| BUSINESS PROFILE | Average Investment by a business | 87,388 PKR | 14 |
| | Total businesses found at site | 50 | NA |
| | Average total employed per business | 2 | NA |
| | Youth | 1 | |
| | Women | 0 | |
| | Average age of business | 09 years | 5 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 8% | 14 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Lack of investment<br>2. Law and Order/Security concerns<br>3. Unemployment | NA |
| | Business registered or unregistered | Registered 36% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 68% improving | 10 |
| | Expansion Plans | 20% intend to expand | 15 |
| | Business expectation in the next year | Improve 12% | 20 |
| | Challenges faced in business expansion (% citing lack of business finance) | 96% | 2 |
| | Structure of business | Single proprietorship 100%<br>Partnership 0%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 28% | NA |
| | Travel experience (Group or Individual) | Group 38%<br>Alone 62% | NA |
| | Average Distance travelled to reach site | 65 km | NA |
| | Time taken on average to reach site | 2 hrs | NA |
| | Mode of Transportation to Site | Personal Motorcycle 56% | NA |
| | Planned duration of stay | 3 hrs | NA |
| | District from which tourist is coming from | 60% Multan | NA |
| | Source of knowledge about site | Friends 96%<br>Family 66% | NA |
| | Overall satisfaction rating (respondents rating 5) | 94% | 2 |
| | Satisfaction with management attitude respondents rating 5) | 32% | 9 |
| | Likelihood of recommendation | 100% | 1 |
| | Suitability for women (% citing not suitable) | 0% | 15 |

## Tomb of Mai Maharban – Multan



The tomb of Mai Maharban is located near Children Complex on Abdali Road. It is a very old structure (probably oldest remaining structure in Multan).

There is practically no information about the person of Mai Meharban and very little has been written about the architecture of the building in which she is buried. Scholars like A.N. Khan mention her name only once but nothing about her life, time or the period of construction of her tomb. She was the wife of one Shaikh Hasan who is said to have come to Multan shortly after the time of Shah Yousaf Gardezi. If date of its construction (1140/535) is accepted the lady becomes a contemporary of Shah Yousaf Gardezi who died in 1136 AD. Her tomb turns out to be contemporary to Yousaf Gardezi but over a hundred years earlier than that of the Mausoleum of Baha ul Haq Zakriya (d. 656/ 1258 to 666 AH/ 1267). But in plan and elevation it is closer to the latter and much different from the former. Thus, for all intents and purposes, the construction of the tomb must be related to the Post-Baha ul Haq Zakriya's time towards the close of the 13th century.

The structure comprises octagonal building with an octagonal second storey and a plastered dome with finial on a thick cylindrical mass of masonry laid in mud mortar. The exposed brick work laid in mud mortar is now decaying and certain portions are missing altogether. Due to lack of maintenance, water penetration and settlement, dangerous cracks have appeared both in the walls and dome.

Set in the corner of an oblong court, the tomb is approached from a very narrow street. The houses have been built at a distance of 2 feet on the north/east and west sides.

Sections of brickwork have already fallen off while cracks are developing in the dome also. The interior is devoid of any decoration. It is in very poor condition due its masonry set in mud mortar which is eroding due to weathering.[52]

[52] : https://www.facebook.com/pg/Exploring-Multan-133375346760712/photos/?tab=album&album_id=277536422344603

Table 20: **Tomb of Mai Maharban – Multan**

| Report Card - Summary of Key Findings from the Evaluation: Tomb of Mai Maharban | | | |
|---|---|---|---|
| | | Results | Rank out of 23 |
| BUSINESS PROFILE | Average Investment by a business | 116,780 PKR | 12 |
| | Total businesses found at site | 50 | NA |
| | Average total employed per business | 1 | NA |
| | Youth | 0 | |
| | Women | 0 | |
| | Average age of business | 9 years | 5 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 24% | 11 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Lack of investment<br>2. Law and Order/Security concerns<br>3. Space for stall issues | NA |
| | Business registered or unregistered | Registered 40% | NA |
| | Participation in Business Association | 100% Unassociated | NA |
| | Current State of Business (improving or deteriorating) | 72% Improving | 8 |
| | Expansion Plans | 32% Intend to expand | 11 |
| | Business expectation in the next year | Improve 56% | 13 |
| | Challenges faced in business expansion (% citing lack of business finance) | 80% | 5 |
| | Structure of business | Single proprietorship 96%<br>Partnership 4%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 36% | NA |
| | Travel experience (Group or Individual) | Group 44%<br>Alone 56% | NA |
| | Average Distance travelled to reach site | 17 km | NA |
| | Time taken on average to reach site | 1 hrs | NA |
| | Mode of Transportation to Site | Rickshaw 34% | NA |
| | Planned duration of stay | 1.6 hrs | NA |
| | District from which tourist is coming from | 84% Multan | NA |
| | Source of knowledge about site | Family 86%<br>Friends 64% | NA |
| | Overall satisfaction rating (respondents rating 5) | 86% | 3 |
| | Satisfaction with management attitude respondents rating 5) | 6% | 15 |
| | Likelihood of recommendation | 76% | 10 |
| | Suitability for women (% citing not suitable) | 0% | 15 |

## Shrine of Hazrat Baba Haji Sher Dewan Chawli Mashaikh – Vehari

The holy shrine of Baba Haji Sher Dewan is located in Chak No. 317 EB, on the Burewala-Sahoka road. It is also known as Chak Dewan Sahib Chawli Mashaekh, however, was more famous by its name Khatowal during the early days within the sub-continent. It is said that the great Sufi preachers of Islam- Hazrat Baba Faridudin Masud Ganj Shakar and Makhdoom Allauddin Ahmad Sabir Kalyari- were born here. Hazrat Bahuddin Zakrai Multani, Hazrat Syed Jalaluddin Shah Bukhari, Hazrat Usman Marvandi famous known as Lal Shahbaz Qalandar, Makhdoom Allauddin Ahmad Sabir Kalyari and Sikhism founder Baba Guru Nannak are also known to have stayed at this shrine.[53]

[53] https://www.flickr.com/photos/17667265@N07/3420805013

Table 21: **Shrine of Hazrat Baba Haji Sher Dewan Chawli Mashaikh – Vehari**

| Report Card - Summary of Key Findings from the Evaluation: Haji Sher Dewan Chawli Mashaikh | | | |
|---|---|---|---|
| | | Results | Rank out of 23 |
| BUSINESS PROFILE | Average Investment by a business | 73080 PKR | 18 |
| | Total businesses found at site | 50 | NA |
| | Average total employed per business | 2 | NA |
| | Youth | 0 | |
| | Women | 0 | |
| | Average age of business | 2 years | 12 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 28% | 10 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Lack of hotels / night stay places for tourists<br>2. Transport issue<br>3. Lack of resources | NA |
| | Business registered or unregistered | Registered 0% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 36% improving | 12 |
| | Expansion Plans | 48% intend to expand | 8 |
| | Business expectation in the next year | Improve 40% | 16 |
| | Challenges faced in business expansion (%age citing lack of business finance) | 52% | 12 |
| | Structure of business | Single proprietorship 96%<br>Partnership 0%<br>Limited company 4% | NA |
| TOURIST PROFILE | First time visitor | 46% | NA |
| | Travel experience (Group or Individual) | Group 41%<br>Alone 59% | NA |
| | Average Distance travelled to reach site | 80 km | NA |
| | Time taken on average to reach site | 1.74 hrs | NA |
| | Mode of Transportation to Site | Bus 41% | NA |
| | Planned duration of stay | 5.91 hrs | NA |
| | District from which tourist is coming from | 61% Vehari | NA |
| | Source of knowledge about site | Friend 80%<br>Family 17% | NA |
| | Overall satisfaction rating (respondents rating 5) | 83% | 4 |
| | Satisfaction with management's attitude (respondents rating 5) | 9% | 14 |
| | Likelihood of recommendation | 98% | 2 |
| | Suitability for women (%age citing not suitable) | 6% | 12 |

## Shrine (Darbar) Sakhi Saiden Shah Shirazi in Choa Saidan Shah - Chakwal

Choa Saidan Shah is located in the south of Chakwal about 35 kilometres (22 mi) from the town centre on the Chakwal-Khewra road, in the east of Kallar Kahar, about 27 kilometres (17 mi) from the M2 motorway, about 10 kilometres (6 mi) north of Khewra and about 6 kilometres (4 mi) from Katas. The town is placed in a bowl shaped valley, surrounded by hills. It is surrounded by trees and orchards, and is famous for its roses and perfumes.

This town is named after the saint Saidan Shah Shirazi. The legend goes that the area was a desert until the holy man arrived, when he struck the ground with his staff and sweet water sprang up ("Choa" چویا Punjabi meaning "spring"). The saint's shrine is set back from the main bazaar in a courtyard, and the annual Urs is held in April.[54]

[54] https://en.wikipedia.org/wiki/Choa_Saidanshah

Table 22: **Shrine (Darbar) Sakhi Saiden Shah Shirazi in Choa Saidan Shah - Chakwal**

| Report Card - Summary of Key Findings from the Evaluation: Shrine Sakhi Saiden Shah Shirazi in Choa Saiden Shah | | | |
|---|---|---|---|
| | | Results | Rank out of 23 |
| BUSINESS PROFILE | Average Investment by a business | 128,571 | 11 |
| | Total businesses found at site | 39 | NA |
| | Average total employed per business | 1 | NA |
| | Youth | 0 | |
| | Women | 0 | |
| | Average age of business | 4 years | 10 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 0% | 16 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | NA | NA |
| | Business registered or unregistered | Registered 92% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 100% improving | 1 |
| | Expansion Plans | 100% intend to expand | 1 |
| | Business expectation in the next year | Improve 100% | 1 |
| | Challenges faced in business expansion (%age citing lack of business finance) | 0% | 17 |
| | Structure of business | Single proprietorship 100%<br>Partnership 0%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 98% | NA |
| | Travel experience (Group or Individual) | Group 88%<br>Alone 12% | NA |
| | Average Distance travelled to reach site | 32 km | NA |
| | Time taken on average to reach site | 0.71 hrs | NA |
| | Mode of Transportation to Site | Personal car 50% | NA |
| | Planned duration of stay | 1.83 hrs | NA |
| | District from which tourist is coming from | 93% Chakwal | NA |
| | Source of knowledge about site | Friend 33%<br>Family 62% | NA |
| | Overall satisfaction rating (respondents rating 5) | 29% | 13 |
| | Satisfaction with management attitude (respondents rating 5) | 2% | 19 |
| | Likelihood of recommendation | 35% | 15 |
| | Suitability for women (%age citing not suitable) | 41% | 4 |

## Mazar Shah Bahu – Jhang

Hazrat Sultan Bahoo's mausoleum is situated in a village, also known as "Sultan Bahoo", near the banks of the river Chenab in the town of Gar Maraja, district Jhang, Pakistan.

Millions of visitors from far and wide visit the mausoleum to receive blessings and benefits of the spiritual guide. His Urs is celebrated on first Thursday of Jamadi Us Sani every year.

This is the third relocation of the shrine and it is visited by people from all over the country and also from all across the globe.

The present shrine is situated in a populated area. The city Garh Maharaja is at a distance of two miles from the shrine, and the MuzzaffarGarh Road passes at the distance of one and a half mile towards the west. Currently, access to the shrine has become very easy with the construction of concrete roads. The pilgrims from Garh Maharaja and Ahmad PurSial in the South can easily approach the shrine whenever they want.

Table 23: **Mazar Shah Bahu – Jhang**

| Report Card - Summary of Key Findings from the Evaluation: Sultan Baho Shrine- Jhang | | | |
|---|---|---|---|
| | | Results | Rank out of 23 |
| BUSINESS PROFILE | Average Investment by a business | 176,000 | 8 |
| | Total businesses found at site | 60 | NA |
| | Average total employed per business | 2 | NA |
| | Youth | 0 | |
| | Women | 0 | |
| | Average age of business | 12 years | 2 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 8% | 14 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Transport issue<br>2. Unavailability of basic facilities like electricity/ water supply/ telephone<br>3. Law and order/security concerns | NA |
| | Business registered or unregistered | Registered 0% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 100% improving | 1 |
| | Expansion Plans | 22% intends to expand | 14 |
| | Business expectation in the next year | Improve 92% | 4 |
| | Challenges faced in business expansion (%age citing lack of business finance) | 100% | 1 |
| | Structure of business | Single proprietorship 100%<br>Partnership 0%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 76% | NA |
| | Travel experience (Group or Individual) | Group 10%<br>Alone 90% | NA |
| | Average Distance travelled to reach site | 56 km | NA |
| | Time taken on average to reach site | 1.21 hrs | NA |
| | Mode of Transportation to Site | Van 90% | NA |
| | Planned duration of stay | 2.86 hrs | NA |
| | District from which tourist is coming from | 100% Jhang | NA |
| | Source of knowledge about site | Friends 52%<br>Family 71% | NA |
| | Overall satisfaction rating (respondents rating 5) | 0% | 18 |
| | Satisfaction with management's attitude (respondents rating 5) | 0% | 20 |
| | Likelihood of recommendation | 67% | 13 |
| | Suitability for women (%age citing not suitable) | 2% | 14 |

# Fort Munro – DG Khan

**Fort Munro** also known as *TumanLeghari*, is a hill station, located at a height of 6,470 feet above sea level in Dera Ghazi Khan. It attracts many people for short stays during the hot summer. It is around 85 kilometres from Dera Ghazi Khan city, Punjab, Pakistan and about 185 kilometres from Multan in Sulaiman Mountain range. The people of Fort Munro are nomads, especially of the Leghari tribe.

Fort Munro is the only hill station in southern Punjab with an altitude of 1800 meters. Fort Munro can be reached either from Loralai Balochistan or from Multan (Punjab). From Punjab, the mountain range starts near Rakhni, which is a border-post between Balochistan and Punjab.

The town was founded by Robert Groves Sandeman in the later part of the 19th century and named Fort Munro after Colonel Munro who was the commissioner of the Derajat Division.

Fort Munro is part of the Sulaiman Mountain range. The range is located in central Pakistan, extending southward about 280 miles (450 km) from the Gumal Pass to just north of Jacobabad, separating the khyberpakhtunkhwa and Punjab from Balochistan. Its heights gradually decrease toward the south, with summits averaging 6,000–7,000 feet, the highest being the twin peaks (30 miles from the Gumal Pass) called Takht-iSulaiman, or Solomon's Throne, which legend connects with King Solomon's visit to Pakistan

It attracts a number of tourists every year, particularly those who wish to escape from hot plains of southern Punjab to enjoy mild and pleasant weather for a day or two. The Punjab Government has released over Rs2 billion in July 2015 for the provision of basic facilities at the hill station in a bid to make it an important tourist haven. Out of the funds, Rs750 million would be spent on the installation of the chairlift and cable car facility between Fort Munro and Khar, Rs300 million on the provision of clean drinking water, Rs300 million on a wastewater treatment and drainage scheme, Rs1.60 billion on the construction of six new carpeted roads and a cadet college.

Additionally, state-of-the-art landscaping initiatives and the cultivation of cut flowers would also promote development in the region and open new avenues of employment. The Forest Department would afforest 300 acres in the hill station's vicinity. The Irrigation Department is also believed to have forwarded a proposal regarding the construction of six small dams in Fort Munro's vicinity. The development project, which is expected to kick off soon, to attract people from surrounding areas being the only hill station of southern Punjab in Dera Ghazi Khan district. Fort Munro is a cool resort in summers for the people living in south Punjab.

Table 24: **Fort Munro – DG Khan**

| Report Card - Summary of Key Findings from the Evaluation: Fort Munro | | | |
|---|---|---|---|
| | | **Results** | **Rank out of 23** |
| BUSINESS PROFILE | Average Investment by a business | 154,000 | 9 |
| | Total businesses found at site | 50 | NA |
| | Average total employed per business | 2 | NA |
| | Youth | 0 | |
| | Women | 0 | |
| | Average age of business | 8 years | 6 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 24% | 11 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Lack of investment<br>2. Law and order/security concerns<br>3. Poverty | NA |
| | Business registered or unregistered | Registered 36% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 80% improving | 6 |
| | Expansion Plans | 40% intend to expand | 9 |
| | Business expectation in the next year | Improve 48% | 15 |
| | Challenges faced in business expansion (% citing lack of business finance) | 88% | 4 |
| | Structure of business | Single proprietorship 96%<br>Partnership 4%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 62% | NA |
| | Travel experience (Group or Individual) | Group 86%<br>Alone 14% | NA |
| | Average Distance travelled to reach site | 152 km | NA |
| | Time taken on average to reach site | 2.97 hrs | NA |
| | Mode of Transportation to Site | Personal motorcycle 38% | NA |
| | Planned duration of stay | 9.48 hrs | NA |
| | District from which tourist is coming from | 54% DG Khan | NA |
| | Source of knowledge about site | Friends 94%<br>TV 92% | NA |
| | Overall satisfaction rating (respondents rating 5) | 46% | 12 |
| | Satisfaction with management attitude (respondents rating 5) | 38% | 7 |
| | Likelihood of recommendation | 70% | 12 |
| | Suitability for women (% citing not suitable) | 2% | 14 |

## Tomb of Nur Jahan – Lahore

The Tomb of Nur Jahan is a 17th-century mausoleum in Lahore, Pakistan, that was built for the Mughal empress Nur Jahan. The tomb's marble was plundered during the Sikh era in 18th century for use at the Golden Temple in Amritsar. The red sandstone mausoleum, along with the nearby tomb of Jahangir, tomb of Asif Khan, and Akbari Sarai, forms part of an ensemble of Mughal monuments in Lahore's Shahdara Bagh.

Nur Jahan contributed extensively to the expansion of the Mughal Empire during her reign between 1611 and 1627, by helping foster overseas trade.

Having survived Jahangir by 18 years, she died at the age of 68 years and much of the mausoleum was most probably constructed during her lifetime. The tomb took four years to complete at the cost of Rupees three lakhs. Following the ascent of Shah Jahan to the Mughal throne, she was provided a yearly allowance of 200,000 rupees. Given the poor state of relations between her and Shah Jahan, it is likely that she funded the construction of her tomb from her annual allowance.

As with the Tomb of Asif Khan, Nur Jahan's tomb was stripped of its ornamental stones and marble during the occupation of Lahore by the army of Ranjit Singh. Much of the materials were used to decorate the Golden Temple in Amritsar, and it has been said that half of the Golden Temple's splendour is derived from marble plundered from Nur Jahan's shrine.

The Shahdara ensemble of monuments, including the Nur Jahan tomb, suffered under British rule when a railway line was built between the tombs of Asif Khan and Nur Jahan. The tomb underwent minor repairs but is slated for major restoration.

The tomb was built on a podium, in the *takhtgah* style in which the podium serves as the *takht*, or "throne." With a platform measuring 158 square feet, the tomb is in the shape of a square and measures 124 feet on each side, and is 19.6 feet high. Minarets may previously have risen from the corners of the mausoleum, similar to the nearby Tomb of Jahangir.

Table 25: **Tomb of Nur Jahan – Lahore**

| Report Card - Summary of Key Findings from the Evaluation: Tomb Nur Jahan | | Results | Rank out of 23 |
|---|---|---|---|
| BUSINESS PROFILE | Average Investment by a business | 144,200 | 10 |
| | Total businesses found at site | 39 | NA |
| | Average total employed per business | 1 | NA |
| | Youth | 0 | |
| | Women | 0 | |
| | Average age of business | 7 years | 7 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 64% | 5 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. People from TMA create problems 2. Unavailability of basic facilities like electricity/water supply/ telephone/roads etc, 3. There are no issues | NA |
| | Business registered or unregistered | Registered 0% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 96% improving | 2 |
| | Expansion Plans | 36% intends to expand | 10 |
| | Business expectation in the next year | Improve 24% | 17 |
| | Challenges faced in business expectation (%age citing lack of business finance) | 28% | 40 |
| | Structure of business | Single proprietorship 100%<br>Partnership 0%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 86% | NA |
| | Travel experience (Group or Individual) | Group 100%<br>Alone 0% | NA |
| | Average Distance travelled to reach site | 17 km | NA |
| | Time taken on average to reach site | 0.39 hrs | NA |
| | Mode of Transportation to Site | Rickshaw 64% | NA |
| | Planned duration of stay | 2.89 hrs | NA |
| | District from which tourist is coming from | 98% Lahore | NA |
| | Source of knowledge about site | Friends 40%<br>Family 90% | NA |
| | Overall Satisfaction Rating | 78% | 7 |
| | Satisfaction with management attitude (Very good) | 32% | 9 |
| | Likelihood of recommendation | 100% | 1 |
| | Suitability for women (%age citing not suitable) | 4% | 13 |

## Harappa – Sahiwal

Harappa is the name of the ruins of the capital city of the Indus Civilization, and is one of the best-known sites in Pakistan, located on the bank of River Ravi in central Punjab. At the height of the Indus civilization, between 2600–1900 BC, Harappa was one of the handfuls of cities and towns covering a million square kilometers (about 385,000 square miles) of territory in South Asia.

Harappa was occupied between about 3800 and 1500 BCE: and, in fact, the modern city of Harappa is still built atop some of these ruins. At its height, it covered an area of at least 100 ha (250 ac) and may have been about twice that, given how much of the site has been buried by the alluvial floods of the Ravi river. Intact structural remains include those of a citadel/fortress, a massive monumental building once called the granary, and at least three cemeteries. Many of the adobe bricks were robbed in antiquity from the significant architectural remains.

At its beginnings, Harappa was a small settlement with a collection of workshops, where craft specialists made agate beads. Some evidence suggests that people from older Ravi phase sites in the adjacent hills were the migrants who first settled Harappa.

Harappa was discovered in 1826 and first excavated in 1920 and 1921 by the Archaeological Survey of India, led by Rai Bahadur Daya Ram Sahni, as described later by M.S. Vats. Over 25 field seasons have occurred since the first excavations. Other archaeologists associated with Harappa include Mortimer Wheeler, George Dales, Richard Meadow, and J. Mark Kenoyer.[55]

[55] https://www.thoughtco.com/harappa-pakistan-capital-city-171278

Table 26: **Harappa – Sahiwal**

| Report Card - Summary of Key Findings from the Evaluation: Harappa- Capital city of Indus Civilization | | | |
|---|---|---|---|
| | | Results | Rank out of 23 |
| BUSINESS PROFILE | Average Investment by a business | 532,320 PKR | 1 |
| | Total businesses found at site | 50 | NA |
| | Average total employed per business | 1 | NA |
| | Youth | 0 | |
| | Women | 0 | |
| | Average age of business | 7 years | 7 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 80% | 2 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Transport issues<br>2. People from TMA creates problems<br>3. Unavailability of basic facilities like electricity/water supply/ telephone/roads etc. | NA |
| | Business registered or unregistered | Registered 8% | NA |
| | Participation in Business Association | 76% Unassociated | NA |
| | Current State of Business (improving or deteriorating) | 96% improving | 2 |
| | Expansion Plans | 88% intent to expand | 4 |
| | Business expectation in the next year | Improve 80% | 7 |
| | Challenges faced in business expansion (% citing lack of business finance) | 92% | 3 |
| | Structure of business | Single proprietorship 92%<br>Partnership 4%<br>Limited company 4% | NA |
| TOURIST PROFILE | First time visitor | 52% | NA |
| | Travel experience (Group or Individual) | Group 36%<br>Alone 64% | NA |
| | Average Distance travelled to reach site | 41 km | NA |
| | Time taken on average to reach site | 1.2 hrs | NA |
| | Mode of Transportation to Site | Personal motorcycle 40% | NA |
| | Planned duration of stay | 4.9 hrs | NA |
| | District from which tourist is coming from | 76% Sahiwal | NA |
| | Source of knowledge about site | Television 44%<br>Friend 46% | NA |
| | Overall satisfaction rating (respondents rating 5) | 10% | 15 |
| | Satisfaction with management attitude (respondents rating 5) | 18% | 12 |
| | Likelihood of recommendation | 76% | 10 |
| | Suitability for women (% citing not suitable) | 16% | 9 |

# Kalabagh – Mianwali

Kalabagh, on the bank of Indus River, was a state ruled by the Nawabs for nearly 900 years, since the time of Sultan Mahmud of Ghazni. During the British Raj, Kalabagh was not made a princely state by the British.

Kalabagh is a town and union council of Mianwali District in the Punjab province of Pakistan. It is located on the western bank of Indus River and is also the site of the proposed Kalabagh Dam. It is famous for its red hills of the salt range and scenic view of the Indus River traversing through the hills. It also produces handicrafts, especially footwear, and Makhadi Halwa.

The naming clearly is of Turkic and Persian origin. 'Kalay' is a typical Pashto word meaning 'village' or 'dhok', and 'Bagh' means 'garden'. Hence 'Kalabagh' simple means 'Garden Village' in local language. Similar names of some other nearby towns are "Kot Kala" ("Fort village"), "Sarai Kala" ("Sarai village" or "Inn village") or "Samundar Khan Kala" ("village of Samundar Khan").[56]

[56] https://en.wikipedia.org/wiki/Kalabagh

Table 27: **Kalabagh – Mianwali**

| Report Card - Summary of Key Findings from the Evaluation: KalaBagh | | | |
|---|---|---|---|
| | | Results | Rank out of 23 |
| BUSINESS PROFILE | Average Investment by a business | 325,292 PKR | 2 |
| | Total businesses found at site | 57 | NA |
| | Average total employed per business | 2 | NA |
| | Youth | 0 | |
| | Women | 0 | |
| | Average age of business | 8 years | 6 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 28% | 10 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. No issue<br>2. Inflation<br>3. Unavailability of basic facilities like electricity/water supply/ telephone/roads etc. | NA |
| | Business registered or unregistered | Registered 48% | NA |
| | Participation in Business Association | 96% Unassociated | NA |
| | Current State of Business (improving or deteriorating) | 100% improving | 1 |
| | Expansion Plans | 60% intent to expand | 7 |
| | Business expectation in the next year | Improve 76% | 8 |
| | Challenges faced in business expansion (% citing lack of business finance) | 68% | 10 |
| | Structure of business | Single proprietorship 100%<br>Partnership 0%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 24% | NA |
| | Travel experience (Group or Individual) | Group 66%<br>Alone 34% | NA |
| | Average Distance travelled to reach site | 199 km | NA |
| | Time taken on average to reach site | 3.3 hrs | NA |
| | Mode of Transportation to Site | Bus 28% | |
| | Planned duration of stay | 3.1 hrs | |
| | District from which tourist is coming from | 26% Mianwali | NA |
| | Source of knowledge about site | Friend 54%<br>Family 42% | NA |
| | Overall satisfaction rating (respondents rating 5) | 66% | 8 |
| | Satisfaction with management attitude (respondents rating 5) | 56% | 4 |
| | Likelihood of recommendation | 98% | 2 |
| | Suitability for women (% citing not suitable) | 15% | 10 |

## Sadiq Garh Palace – Bahawalpur

The Sadiq Garh Palace was established in 1882 by His Highness Nawab Sadiq Muhammad Khan (IV). This Palace was constructed under the supervision of expert engineers with a cost of approximately 1,500,000 Pakistani rupees. The construction work continued for almost ten years. After the completion of the palace it was inaugurated in the presence of a majestic court.

There is huge wall all around the palace with lush green lawns adorning beautiful plants and vibrantly coloured flowers. This sky building is a masterpiece in itself with a bastion in every corner of the palace placed to resemble a soldier on his duty to protect. There is a beautiful dome in the center of the building which glows with multi-colored lights during night time.

There are cellars under the bastions which allows for natural light to penetrate through. Inside the Central Senate is a court hall with all accessories for respected guests. From the wash rooms to the office, the floors, roofs and walls are all beautifully designed.

All the material and furniture is of best quality. There are big mirrors and lamps in the rooms along with beautiful art norms and curtains.

In the Durbar hall a kingly plank is placed with a large mirror behind it. It is claimed that in order to transport this mirror from the ports in Karachi to the city of Bahwalpur, many platforms of various railway stations had to be expanded.

There is a beautiful shower in front the porch of the Palace increasing its majesty. The palace also homes a zoo along with a museum in which deceased animals and birds are mummified using chemical methods.

The structure of the palace has been designed with such expertise that the palace appears like a garden from all its views. The northern door has been designed such that one can view pools of water from one side and the desert from the other. There is also a library in the palace housing some rare books of English, Urdu, Persian and Arabic.

**Table 28: Sadiq Garh Palace – Bahawalpur**

| Report Card - Summary of Key Findings from the Evaluation: Sadiq Garh Palace/Noor Palace | | | |
|---|---|---|---|
| | | Results | Rank out of 23 |
| BUSINESS PROFILE | Average Investment by a business | 185,556 PKR | 7 |
| | Total businesses found at site | 9 | NA |
| | Average total employed per business | 3 | NA |
| | Youth | 2 | |
| | Women | 0 | |
| | Average age of business | 2 years | 12 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 44% | 7 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Lack of hotel / night stay places for tourists | NA |
| | Business registered or unregistered | Registered 11% | NA |
| | Participation in Business Association | 100% Unassociated | NA |
| | Current State of Business (improving or deteriorating) | 89% improving | 3 |
| | Expansion Plans | 100% intent to expand | 1 |
| | Business expectation in the next year | Improve 90% | 5 |
| | Challenges faced by business (% citing lack of business finance) | 100% | 1 |
| | Structure of business | Single proprietorship 100%<br>Partnership 0%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 33% | NA |
| | Travel experience (Group or Individual) | Group 93%<br>Alone 7% | NA |
| | Average Distance travelled to reach site | 18 km | NA |
| | Time taken on average to reach site | 0.36 hrs | NA |
| | Mode of Transportation to Site | Personal motorcycle 53% | NA |
| | Planned duration of stay | 2.4 hrs | NA |
| | District from which tourist is coming from | 100% Bhawalpur | NA |
| | Source of knowledge about site | Friend 40%<br>Family 60% | NA |
| | Overall satisfaction rating (respondents rating 5) | 80% | 6 |
| | Satisfaction with management's attitude (respondents rating 5) | 87% | 1 |
| | Likelihood of recommendation | 100% | 1 |
| | Suitability for women (% citing not suitable) | 0% | 15 |

## Cholistan Desert – Bahawalpur

The Cholistan Desert, also locally known as Rohi (روہی), sprawls 30 km (19 mi) from Bahawalpur, Punjab, Pakistan and covers an area of 16,000 km² (6,200 sq mi). It adjoins the Thar Desert, extending over to Sindh and into India.

The word Cholistan is derived from the Turkic word *chol*, meaning *desert*. The people of Cholistan lead a semi-nomadic life, moving from one place to another in search of water and fodder for their animals. The dry bed of the Hakra River runs through the area, along which many settlements of the Indus Valley Civilization have been found. The desert also hosts an annual Jeep rally, known as Cholistan Desert Jeep Rally. It is the biggest motor sports event in Pakistan.

Table 29: **Cholistan Desert – Bahawalpur**

| Report Card - Summary of Key Findings from the Evaluation: Cholistan Desert | | | |
|---|---|---|---|
| | | **Results** | **Rank out of 23** |
| BUSINESS PROFILE | Average Investment by a business | 38,200 PKR | 21 |
| | Total businesses found at site | 20 | NA |
| | Average total employed per business | 2 | NA |
| | Youth | 2 | |
| | Women | 0 | |
| | Average age of business | 3 years | 11 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 15% | 12 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Lack of hotels / night stay places for tourists<br>2. Lack of resources<br>3. unavailability of basic facilities like electricity/water supply/ telephone/roads etc. | NA |
| | Business registered or unregistered | Registered 10% | NA |
| | Participation in Business Association | 100% Unassociated | NA |
| | Current State of Business (improving or deteriorating) | 100% improving | 1 |
| | Expansion Plans | 100% intent to expand | 1 |
| | Business expectation in the next year | Improve 95% | 3 |
| | Challenges faced in business expansion (% citing lack of business finance) | 75% | 8 |
| | Structure of business | Single proprietorship 100%<br>Partnership 0%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 48% | NA |
| | Travel experience (Group or Individual) | Group 88%<br>Alone 12% | NA |
| | Average Distance travelled to reach site | 76 km | NA |
| | Time taken on average to reach site | 2 hrs | NA |
| | Mode of Transportation to Site | Personal motorcycle 44% | NA |
| | Planned duration of stay | 5.3 hrs | NA |
| | District from which tourist is coming from | 76% Bhawalpur | NA |
| | Source of knowledge about site | Friend 44%<br>Family 52% | NA |
| | Overall satisfaction rating (respondents rating 5) | 48% | 11 |
| | Satisfaction with management attitude respondents rating 5) | 20% | 11 |
| | Likelihood of recommendation | 92% | 5 |
| | Suitability for women (% citing not suitable) | 86% | 1 |

## Khanpur Dam – Haripur

Khanpur Dam is a dam located on the Haro River near the village of Khanpur, Khyber Pakhtunkhwa, Pakistan, approximately 50 km from the Capital city of Islamabad. It was constructed in 1953, along with the construction of Khanpur Lake, and is 51 meters (167 feet) high with a storage capacity of 110,000 acre feet. Khanpur dam is used to supply water for both irrigation and municipal purposes to the surrounding districts of Rawalpindi and Attock.

The Khanpur Lake attracts hundreds of tourists from all over the country. With a view of Margla hills, the lake has become a popular tourist destination where families and individuals can enjoy boating, picnicking, speed boating and fishing. There is an island in the middle of lake that can be reached by boats which provide pick and drop services. An adventure club, by the name of Hawk Adventure Club, has recently created its camp near the lake shore. They provide facilities for adventure sports like rowing, diving and speed boating- multiple varieties of airborne and waterborne sports offered year round. The historical places of Taxila nearby, particularly the Taxila Museum, further add to the touristic charm.

Table 30: **Khanpur Dam – Haripur**

| Report Card - Summary of Key Findings from the Evaluation: Khanpur Dam | | | |
|---|---|---|---|
| | | Results | Rank out of 23 |
| BUSINESS PROFILE | Average Investment by a business | 95,571 PKR | 13 |
| | Total businesses found at site | 27 | NA |
| | Average total employed per business | 2 | NA |
| | Youth | 0 | |
| | Women | 0 | |
| | Average age of business | 9 years | 5 |
| | Average annual revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 50% | 6 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Inflation<br>2. Less Profit<br>3. Lack of hotel / night stay places for tourists | NA |
| | Business registered or unregistered | Registered 7% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 93% improving | 3 |
| | Expansion Plans | 93% intend to expand | 2 |
| | Business expectation in the next year | Improve 71% | 9 |
| | Challenges faced in business expansion (%age citing lack of business finance) | 71% | 9 |
| | Structure of business | Single proprietorship 93%<br>Partnership 7%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 59% | NA |
| | Travel experience (Group or Individual) | Group 62%<br>Alone 38% | NA |
| | Average Distance travelled to reach site | 68 km | NA |
| | Time taken on average to reach site | 1.6 hrs | NA |
| | Mode of Transportation to Site | Van 86% | NA |
| | Planned duration of stay | 4.8 hrs | NA |
| | District from which tourist is coming from | 21% Haripur | NA |
| | Source of knowledge about site | Family 93%<br>Friend 41% | NA |
| | Overall satisfaction rating (respondents rating 5) | 0% | 18 |
| | Satisfaction with management attitude (respondents rating 5) | 0% | 20 |
| | Likelihood of recommendation | 86% | 8 |
| | Suitability for women (% citing not suitable) | 45% | 3 |

# Jallo Park – Lahore

Jallo Park (sometimes called Jallo Wildlife Park), established in 1978, is a public recreation and wildlife site located in Lahore District, Punjab, Pakistan. Spread over an area of 461 acres (187 ha), it is one of the three main wildlife parks located in Lahore, the other two being Changa Manga and Lahore Zoo Safari. The park is 7 kilometres (4.3 mi) east to Lahore city. Facilities at Jallo Park include a Forest Research Centre, Wildlife Breeding Center, restaurants, coffee shops, a theme park, a sports complex, swimming pool, and a large lake for fishing and boating. It is currently funded by Punjab Wildlife and Parks Department of Government of Punjab. It is easily accessible by taxi, TransLahore buses and Lahore City Commuter trains that stop at Jallo Railway Station. Now the Botanical Garden Jallo is the part of this biggest Wildlife park Jallo.

Jallo Park was established in 1978 as a recreation park for the public. 43 acres (17 ha) of the park have been allocated as a breeding center for wildlife. In 2007, many sambar and chital deer were brought to the park for breeding. A number of birds, such as species of pheasants and parrots, were also added to the park.

In 2008, the Government of Punjab took steps for the development and beautification of the park. A sports complex was added which included courts for lawn tennis and volleyball, grounds for cricket and soccer, and a 50-kilometre (31 mi) track for bicycling. The park also has a public swimming pool[57].

The park is situated 20 km east of Lahore along Wagha – Amritsar Railway Line and ½ km from Lahore Canal Branch on its left side. This area of 837 acres was a reserve forest since 1922 and was being managed for production of timber/fuel wood and for conducting forestry research. Out of 837 acres, the Park was established over 456 acres under various development schemes since 1978. Moreover, during 2007-08 to 2009-2010, a development scheme namely "Addition of Recreational Facilities in Jallo Park Lahore" with the total cost of Rs.19.280 million has been launched. The Park has been conceived as a theme Park with a combination of cultural, educational and amusement facilities.

The park can be accessed without having to pay an entry fee. The recreational facilities at economical charges provide an opportunity to educate the public about nature, forests and forest trees.

[57] https://en.wikipedia.org/wiki/Jallo_Park

Table 31: **Jallo Park – Lahore**

| Report Card - Summary of Key Findings from the Evaluation: Jalo Park | | | |
|---|---|---|---|
| | | **Results** | **Rank out of 23** |
| BUSINESS PROFILE | Average Investment by a business | 67800 PKR | 19 |
| | Total businesses found at site | 43 | NA |
| | Average total employed per business | 0 | NA |
| | Youth | 0 | |
| | Women | 0 | |
| | Average age of business | 7 years | 7 |
| | Average annual revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 88% | 1 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. People from TMA create problems<br>2. police<br>3. Lack of investment/food authorities impose challan | NA |
| | Business registered or unregistered | Registered 0% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 96% improving | 2 |
| | Expansion Plans | 32% intends to expand | 11 |
| | Business expectation in the next year | Improve 20% | 18 |
| | Challenges faced in business expansion (% citing lack of business finance) | 44% | 13 |
| | Structure of business | Single proprietorship 100%<br>Partnership 0%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 84% | NA |
| | Travel experience (Group or Individual) | Group 98%<br>Alone 2% | NA |
| | Average Distance travelled to reach site | 18 km | NA |
| | Time taken on average to reach site | 0.5 hrs | NA |
| | Mode of Transportation to Site | Rickshaw 44% | NA |
| | Planned duration of stay | 3.4 hrs | NA |
| | District from which tourist is coming from | 96% Lahore | NA |
| | Source of knowledge about site | Family 60%<br>Friend 56% | NA |
| | Overall satisfaction rating (respondents rating 5) | 82% | 5 |
| | Satisfaction with management attitude (respondents rating 5) | 42% | 6 |
| | Likelihood of recommendation | 92% | 5 |
| | Suitability for women (% citing not suitable) | 0% | 15 |

## Shrine of Hazrat Makhdum Jahaniyan Jahangasht – Bahwalpur

Makhdoom Jahaniyan Jahangasht (b 1308- d 1384) was a Sufi saint from the South Asia. His descendants are known as Bukhari and are a prominent lineage of Suhrawardi Saadat. Makhdoom was born on 19 January 1308 AD (14 Shaban 707 AH) in Uch near Bahawalpur, Pakistan. His father, Syed Ahmed Kabir, was the youngest son of Jalaluddin Surkh-Posh Bukhari[58]

The tomb of Makhdoom Jahaniyan Jahangasht is a fine example of the flat-roofed tomb building tradition at Uch Sharif. The design typically consists of a large rectangular funerary chamber with the grave of a specific luminary occupying a prime position. Around the main shrine-but still under the same roof-are unmarked masonry graves of those who wished to be buried in close proximity to their religious leader. Entrance to the building is typically through a wooden porch, as is the case here. A mosque is also located on the premises, although it is not always attached to the main building.

The architect and historian Kamil Khan Mumtaz notes that the age of many of these buildings in Uch is uncertain. All of them were definitely standing by the 19th or early 20th centuries, but they are likely restorations of far older structures, some of which may be faithful reconstructions of 13th or 14th century originals. However, as this structure was built to honor Jahaniyan Jahangasht, there is good reason to assume that it was originally constructed immediately after his death in the late 14th century.

Makhdoom Jahaniyan Jahangasht (1308-1384) was a prominent Sufi saint and the grandson of Jalaluddin Surkh-Posh Bukhari whose tomb is also shown on this website. He is an important figure in Uch Sharif's history not just for his religious work, but also for his architectural legacy. It was he who raised the necessary funds to construct the magnificent tomb of Baha'al-Halim which inspired several other domed monuments in Uch Sharif. This tomb, as well as many others in Uch Sharif, remains a site of popular devotion.

[58] https://en.wikipedia.org/wiki/Jahaniyan_Jahangasht

Table 32: **Shrine of Hazrat Makhdum Jahaniyan Jahangasht – Bahawalpur**

| Report Card - Summary of Key Findings from the Evaluation: Hazrat Makhdum Jahaniyan Jahangasht | | | |
|---|---|---|---|
| | | **Results** | **Rank out of 23** |
| BUSINESS PROFILE | Average Investment by a business | 17,760 PKR | 23 |
| | Total businesses found at site | 36 | NA |
| | Average total employed per business | 0 | NA |
| | Youth | 0 | |
| | Women | 0 | |
| | Average age of business | 2 years | 12 |
| | Average annual revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 0% | 16 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Unavailability of basic facilities like electricity/water supply/ telephone/roads etc.<br>2. Taxes<br>3. Lack of resources | NA |
| | Business registered or unregistered | Registered 0% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 52% improving | 11 |
| | Expansion Plans | 92% intend to expand | 3 |
| | Business expectation in the next year | Improve 52% | 14 |
| | Challenges faced in business expansion (% citing lack of business finance) | 80% | 5 |
| | Structure of business | Single proprietorship 100%<br>Partnership 0%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 60% | NA |
| | Travel experience (Group or Individual) | Group 80%<br>Alone 20% | NA |
| | Average Distance travelled to reach site | 80 km | NA |
| | Time taken on average to reach site | 1.8 hrs | NA |
| | Mode of Transportation to Site | Personal car 73% | NA |
| | Planned duration of stay | 3 hrs | NA |
| | District from which tourist is coming from | 100% Bahawalpur | NA |
| | Source of knowledge about site | Friend 60%<br>Family 40% | NA |
| | Overall satisfaction rating (respondents rating 5) | 0% | 18 |
| | Satisfaction with management's attitude (respondents rating 5) | 3% | 18 |
| | Likelihood of recommendation | 100% | 1 |
| | Suitability for women (%age citing not suitable) | 33% | 6 |

## Hiran Minar – Sheikhupura

Hiran Minar (literally, the "deer tower") is a hunting retreat built by Emperor Jahangir to the northwest of Lahore. It was constructed in memory of an antelope named Mansraj that was beloved to the emperor. The memorial tower stands 30 meters high and is 10 meters wide at its base. Around the perimeter are 214 holes that are believed to have been used as supports for the severed heads of animal trophies taken by the emperor. This form and function is similar to an earlier tower, also known as Hiran Minar, built at FatepurSikri. It also resembles the NimSerai Minar at Malda, whose projections may have been used in a similar manner to display the captured heads of local rebels.

To the east of the tower is an enormous rectangular tank with an octagonal baradari at its center. The baradari was used as a royal retreat by the emperor and is accessible via a bridge extending west toward the tower. Small pavilions mark the corners of the tanks and feature pyramidal roofs with entrances on four sides. On each side of the tank are shallow ramps that allowed wildlife in the hunting park easy access to the water. The water level was maintained using a series of channels and catchment basins leading to the site. Unlike nearby Lahore, the surrounding countryside is thinly populated and remains largely rural. A belt of forest surrounds the site, further insulating it from the modern environment, allowing the visitor to experience the Mughal garden in a landscape that has changed relatively little since its inception[59].

[59] http://www.orientalarchitecture.com/sid/871/pakistan/sheikhupura/hiran-minar

In 1634, Jahangir's successor Shah Jahan visited his father's favourite hunting preserve and decided to add to the complex by constructing a large water tank and octagonal pavilion to the east of the memorial tower (for context, this was two years after Shah Jahan started building the Taj Mahal). The rectangular water tank measures 750 feet by 895 feet and features a sophisticated series of channels and catchment basins to maintain the water level. Brick ramps in the middle of each side of the tank provide access to the water for animals living in the preserve. The octagonal pavilion, which served as a royal retreat, sits in the middle of the tank and is accessible via an arched stone bridge that leads directly from the pavilion to the tower. Despite being upstaged by these newer structures, the original tower still provides the name for the site as a whole, and HiranMinar remains a testament to a heartwarming — if slightly eccentric — interspecial friendship.[60]

[60] https://www.atlasobscura.com/places/hiran-minar

Table 33: **Hiran Minar – Sheikhupura**

| Report Card - Summary of Key Findings from the Evaluation: Hiran Minar | | | |
|---|---|---|---|
| | | Results | Rank out of 23 |
| BUSINESS PROFILE | Average Investment by a business | 79,875PKR | 15 |
| | Total businesses found at site | 29 | NA |
| | Average total employed per business | 0 | NA |
| | Youth | 0 | |
| | Women | 0 | |
| | Average age of business | 6 years | 8 |
| | Average annual revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 67% | 3 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | N/A | NA |
| | Business registered or unregistered | Registered 0% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 88% improving | 5 |
| | Expansion Plans | 29% intend to expand | 12 |
| | Business expectation in the next year | Improve 13% | 19 |
| | Challenges faced in business expansion (% citing lack of business finance) | 25% | 15 |
| | Structure of business | Single proprietorship 92%<br>Partnership 8%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 50% | NA |
| | Travel experience (Group or Individual) | Group 100% | NA |
| | Average Distance travelled to reach site | 15 km | NA |
| | Time taken on average to reach site | 0.28 hrs | NA |
| | Mode of Transportation to Site | Chingchi 28% | NA |
| | Planned duration of stay | 3.46 hrs | |
| | District from which tourist is coming from | 82% Sheikhupura | NA |
| | Source of knowledge about site | Family 98%<br>Friends 44% | NA |
| | Overall satisfaction rating (respondents rating 5) | 52% | 10 |
| | Satisfaction with management attitude respondents rating 5) | 24% | 10 |
| | Likelihood of recommendation | 62% | 14 |
| | Suitability for women (% citing not suitable) | 20% | 7 |

## Lal Suhanra National Park – Bahwalpur

Lal Sohanra is a biosphere reserve in central Pakistan, 36 Kilometers from Bahawalpur City. The park has a small zoo recreation area and a conservation area for animals. Lal Sohanra is spread over 153,000 acres (620 km2) and is notable for the diversity of its landscape, which includes areas of desert, forest and water.

Lal Suhanra National Park occupies land on both sides of Desert Branch canal, and is spread over an area of 127,480 acres (51,368 hectares) - out of which 20,974 acres (8,491 hectares) are green land (irrigated plantations), 101,726 acres (40,942 hectares) are dry land (desert), and 4,780 acres (1,935 hectares) are wet land (ponds and lakes). The park's terrain is generally flat, interspersed with sand dunes measuring between 1 and 6 meters in height and occupying as many as thousands of acres apiece.

The park has watchtowers, catching ground, tourist huts, rest houses, Motels, camping grounds and treks for the visitors and lovers of nature. Tourism Development Corporation of Punjab

(TDCP) owns and operates a Motel with six double rooms (A.C.) near the park (Ph. No. 0621-871144).

Many species of animals can be found throughout the Lal Suhanra conservation area. These include several wild animals of the desert such as wildcats, rabbits, bustards, and deer. Reptiles in the park include the Monitor lizard, Russell's Viper, Indian Cobra, Saw Scaled Viper, Wolf Snake, John's Sand Boa, and Spiny Tailed Lizard. More than 160 species of birds are also present. Patisar Lake, a large body of water in the center of the park, is ideal for bird watching. In mid-winter, the lake is regularly home to between 10,000 and 30,000 ducks and common coot.

Blackbuck became virtually extinct in the Cholistan Desert but the species has been re-introduced in Lal Suhanra within large enclosures. There is big lake in the center of the park called Patisar Lake, which is ideal for bird watching. Patisar Lake regularly holds between 10,000 and 30,000 ducks and common coot in mid-winter. Over 1300 waterfowl were present in January 1987. The park also supports a large population of birds of prey.[61]

[61] https://www.travel-culture.com/pakistan/lal_suhanra_nationalpark.shtml

Table 34: **Lal Suhanra National Park – Bahawalpur**

| Report Card - Summary of Key Findings from the Evaluation: Lal Suhanra National Park – Bahawalpur | | | |
|---|---|---|---|
| | | Results | Rank out of 23 |
| BUSINESS PROFILE | Average Investment by a business | 224,878 PKR | 4 |
| | Total businesses found at site | 28 | NA |
| | Average total employed per business | 1 | NA |
| | Youth | 1 | |
| | Women | 0 | |
| | Average age of business | 7 years | 7 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 7% | 15 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Unavailability of basic facilities like electricity/water supply/ telephone/roads etc<br>2. Inflation<br>3. Transport issue | NA |
| | Business registered or unregistered | Registered 0% | NA |
| | Participation in Business Association | 96% Unassociated | NA |
| | Current State of Business (improving or deteriorating) | 78% Improving | 7 |
| | Expansion Plans | 67% Intend to expand | 6 |
| | Business expectation in the next year | Improve 89% | 6 |
| | Challenges faced in business expansion (% citing lack of business finance) | 67% | 11 |
| | Structure of business | Single proprietorship 96%<br>Partnership 4%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 92% | NA |
| | Travel experience (Group or Individual) | Group 56%<br>Alone 44% | NA |
| | Average Distance travelled to reach site | 52 km | NA |
| | Time taken on average to reach site | 1.10 hrs | NA |
| | Mode of Transportation to Site | Personal Car 32% | NA |
| | Planned duration of stay | 3 hrs | NA |
| | District from which tourist is coming from | 80% Bhawalpur | NA |
| | Source of knowledge about site | Friends 48%<br>Television 32% | NA |
| | Overall satisfaction rating (respondents rating 5) | 52% | 10 |
| | Satisfaction with management attitude respondents rating 5) | 36% | 8 |
| | Likelihood of recommendation | 24% | 17 |
| | Suitability for women (% citing not suitable) | 8% | 11 |

# Khabeki Lake – Khushab

Khabikki Lake is a salt water lake, in the Soan Sakaser Valley in the southern Salt Range area in Khushab District, Punjab, Pakistan. This lake is formed due to the absence of drainage in the range. It is part of Uchhali Wetlands Complex and has been designated a Ramsar site.

The lake is one-kilometer-wide and two kilometres long. A hill gently ascends on the right side of the lake. Khabikki is also the name of a neighbouring village. Boats are available, and there are two places to stay. One is a hotel by PTDC and the other is a caravan styled stay by a local, where fresh food and transport is available.[62]

[62] https://en.wikipedia.org/wiki/Khabikki_Lake

Table 35: **Khabeki Lake – Khushab**

| Report Card - Summary of Key Findings from the Evaluation: Khabeki Lake | | Results | Rank out of 23 |
|---|---|---|---|
| BUSINESS PROFILE | Average Investment by a business | 217,292PKR | 5 |
| | Total businesses found at site | 50 | NA |
| | Average total employed per business | 3 | NA |
| | Youth | 1 | |
| | Women | 0 | |
| | Average age of business | 7 years | 7 |
| | Average daily revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 8% | 14 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | 1. Lack of investment<br>2. Inflation<br>3. Lack of resources | NA |
| | Business registered or unregistered | Registered 48% | NA |
| | Participation in Business Association | 100% Unassociated | NA |
| | Current State of Business (improving or deteriorating) | 100% Improving | 1 |
| | Expansion Plans | 76% Intend to expand | 5 |
| | Business expectation in the next year | Improve 96% | 2 |
| | Challenges faced in business expansion (% citing lack of business finance) | 78% | 6 |
| | Structure of business | Single proprietorship 100%<br>Partnership 0%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 44% | NA |
| | Travel experience (Group or Individual) | Group 86%<br>Alone 14% | NA |
| | Average Distance travelled to reach site | 304 km | NA |
| | Time taken on average to reach site | 3.82 hrs | NA |
| | Mode of Transportation to Site | Taxi 44% | NA |
| | Planned duration of stay | 3 hrs | NA |
| | District from which tourist is coming from | 21% Mianwali | NA |
| | Source of knowledge about site | Family 67%<br>Friends 44% | NA |
| | Overall satisfaction rating (respondents rating 5) | 56% | 9 |
| | Satisfaction with management attitude respondents rating 5) | 58% | 3 |
| | Likelihood of recommendation | 93% | 4 |
| | Suitability for women (% citing not suitable) | 0% | 15 |

**Thal Desert**

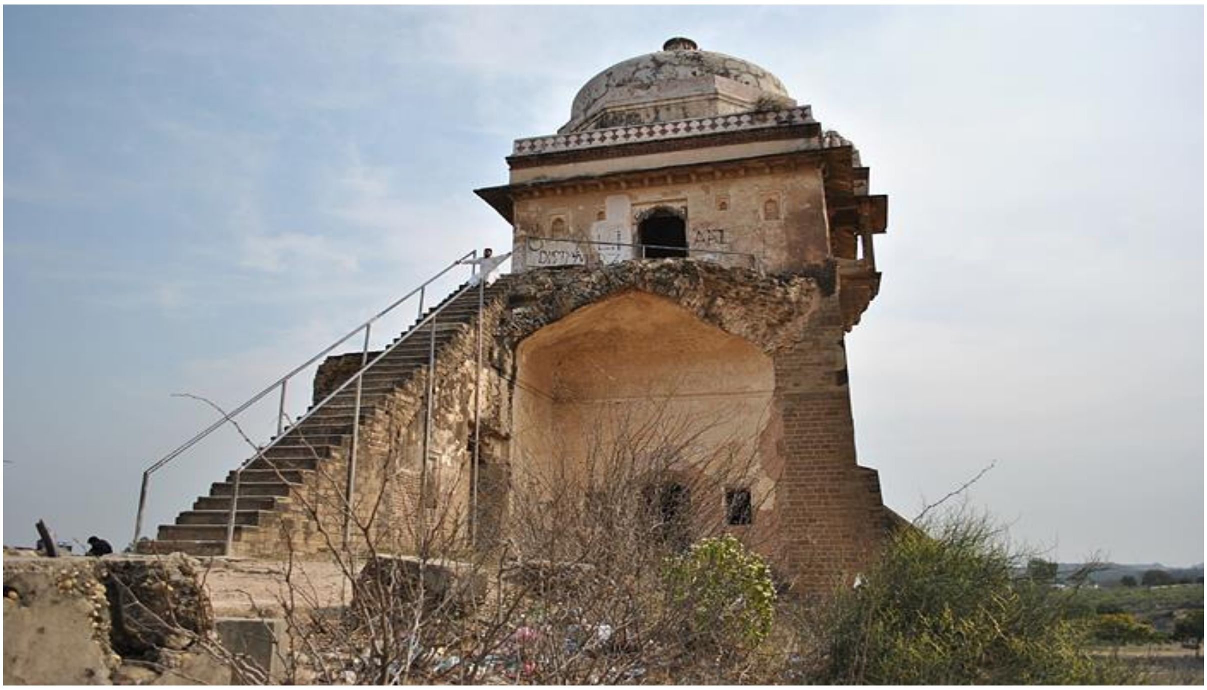
The Thal desert is situated in Punjab, Pakistan. It is vast area mainly between the Jhelum and Sindh rivers near the Pothohar Plateau. Its total length from north to south is 190 miles, and its maximum breadth is 70 miles (110 km) while minimum breadth is 20 miles. This region is divided into the districts of Bhakkar, Khushab, Mianwali, Jhang, Layyah, and Muzaffargarh. Its part in Jhang is on the left bank of the river Jhelum. Geographically, it resembles the deserts of Cholistan and Thar.

The history of Thal Project goes back to over 130 years. It was in 1873 that the project was first conceived for the whole of Thal Doab. The proposal to irrigate this area was repeatedly brought up for discussion in 1919, 1921, 1924, 1925, 1936 and in 1949. But the British colonial masters repeatedly shelved the project on the pretext that it will severely hurt the water availability to lower riparian. The project proposal once again came under discussion in 1975 in a controversial way when Executive Committee of National Economic Council (ECNEC) refused to endorse the project. Finally, on August 16, 2001, General Pervez Musharraf (Retired), then Chief Executive of Pakistan, inaugurated the 30-billion rupee Greater Thal Canal (GTC) project.

Table 36: **Thal Desert – Jhelum**

| Report Card - Summary of Key Findings from the Evaluation: Thal Desert | | | |
|---|---|---|---|
| | | Results | Rank out of 23 |
| BUSINESS PROFILE | Average Investment by a business | 352, 860 PKR | 3 |
| | Total businesses found at site | 41 | NA |
| | Average total employed per business | 3 | NA |
| | Youth | 1 | |
| | Women | 0 | |
| | Average age of business | 5 years | 9 |
| | Average annual revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 66% | 4 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | NA | NA |
| | Business registered or unregistered | Registered 4% | NA |
| | Participation in Business Association | 100% unassociated | NA |
| | Current State of Business (improving or deteriorating) | 100% improving | 1 |
| | Expansion Plans | 8% intends to expand | 17 |
| | Business expectation in the next year | Improve 96% | 2 |
| | Challenges faced in business expansion (%age citing lack of business finance) | 4% | 16 |
| | Structure of business | Single proprietorship 100%<br>Partnership 0%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 96% | NA |
| | Travel experience (Group or Individual) | Alone 95%<br>Group 5% | NA |
| | Average Distance travelled to reach site | 36 km | NA |
| | Time taken on average to reach site | 0.9 hrs | NA |
| | Mode of Transportation to Site | Personal motorcycle 45% | NA |
| | Planned duration of stay | 3.7 hrs | NA |
| | District from which tourist is coming from | 74% Bhakar | NA |
| | Source of knowledge about site | Friend 81%<br>Family 33% | NA |
| | Overall satisfaction rating (respondents rating 5) | 17% | 14 |
| | Satisfaction with management attitude (respondents rating 5) | 5% | 17 |
| | Likelihood of recommendation | 79% | 9 |
| | Suitability for women (%age citing not suitable) | 19% | 8 |

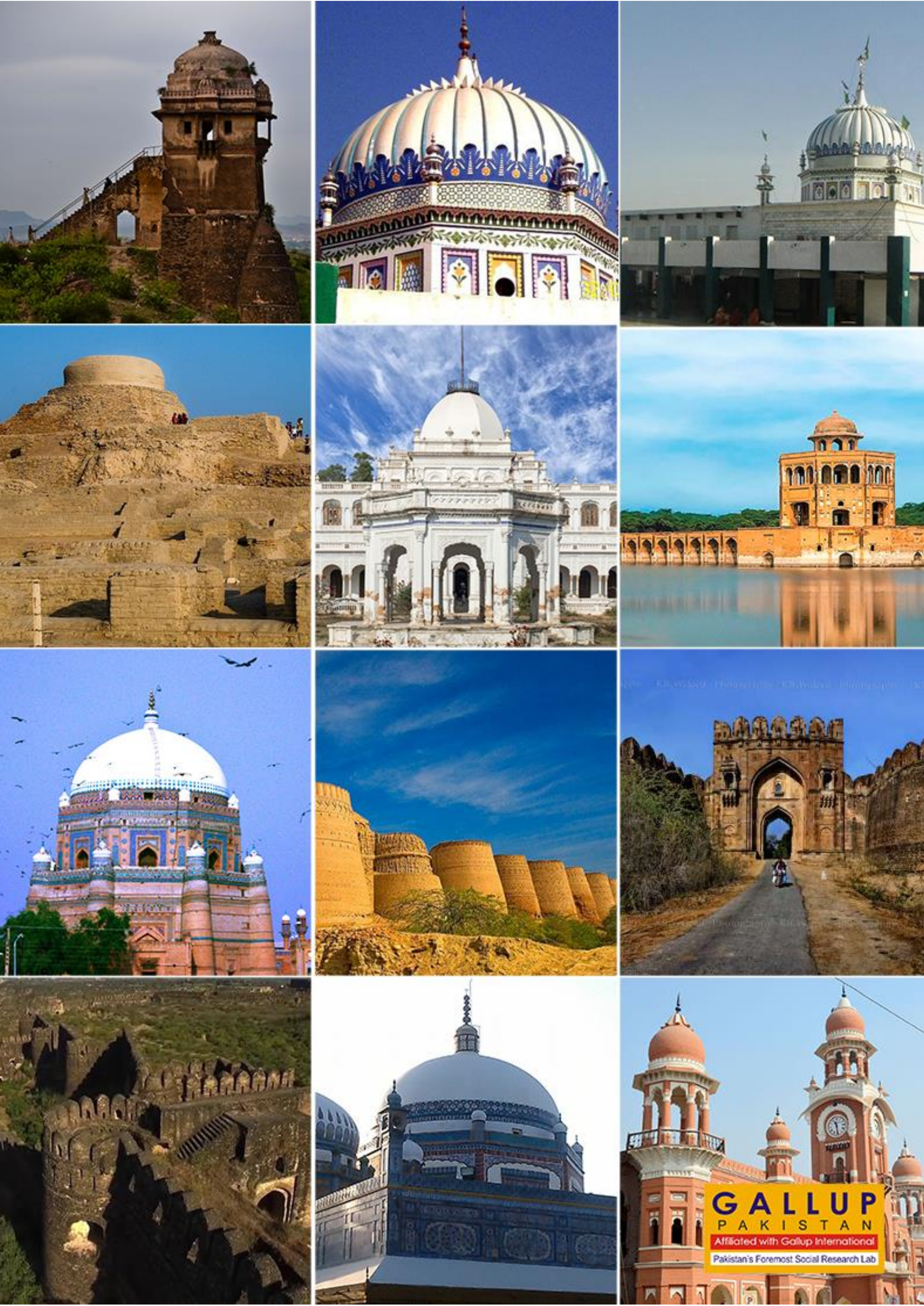
## Raja Man Singh's Haveli- Jhelum



Raja Man Singh, died in 1614, was one of Emperor Akbar's most trusted generals. His haveli (mansion) at Rohtas Fort originally comprised of four rooms, out of which only one survives. The remaining room is approximately 5.5 meters square and is notable for its two balconies on the eastern and southern facades. Each is supported by four brackets with a garuda motif, and surmounted by a three level canopy. The main chamber is domed with a lotus shaped finial on the roof.

Table 37: **Raja Man Singh's Haveli – Jhelum**

| Report Card - Summary of Key Findings from the Evaluation: Raja Man Singh Haveli | | | |
|---|---|---|---|
| | | Results | Rank out of 23 |
| BUSINESS PROFILE | Average Investment by a business | 79,872 PKR | 16 |
| | Total businesses found at site | 29 | NA |
| | Average total employed per business | 1 | NA |
| | Youth | 9 | |
| | Women | 0 | |
| | Average age of business | 6 years | 8 |
| | Average annual revenue (reported in the survey) - Percent business reporting higher than 1000 PKR per day revenue (typical day) | 66% | 4 |
| BUSINESS OPERATIONS | Major issue reported by business (top 3) | No Issue 75% | NA |
| | Business registered or unregistered | Registered 0% | NA |
| | Participation in Business Association | 100% Unassociated | NA |
| | Current State of Business (improving or deteriorating) | 88% Improving | 5 |
| | Expansion Plans | 67% intend to expand | 6 |
| | Business expectation in the next year | 100% Improve | 1 |
| | Challenges faced in business expansion (% citing lack of business finance) | 0% | 17 |
| | Structure of business | Single proprietorship 92%<br>Partnership 8%<br>Limited company 0% | NA |
| TOURIST PROFILE | First time visitor | 50% | NA |
| | Travel experience (Group or Individual) | Group 100%<br>Alone 0% | NA |
| | Average Distance travelled to reach site | 9.88 km | NA |
| | Time taken on average to reach site | 0.28 hrs | NA |
| | Mode of Transportation to Site | Bus 33% | NA |
| | Planned duration of stay | 1.58 hrs | NA |
| | District from which tourist is coming from | 23% Jhelum | NA |
| | Source of knowledge about site | Television 98%<br>Radio 98% | NA |
| | Overall satisfaction rating (respondents rating 5) | 3% | 3 |
| | Satisfaction with management attitude respondents rating 5) | 3% | 18 |
| | Likelihood of recommendation | 32% | 16 |
| | Suitability for women (% citing not suitable) | 54% | 2 |


GALLUP
PAKISTAN
Affiliated with Gallup International
Pakistan's Foremost Social Research Lab