



FOSTERING ECONOMIC GROWTH

(A Company set up under Section 42 of the Companies Ordinance 1984)

Promoting International Religious Tourism to Pakistan

Presentation of PBC's Study for the Event,
Reimagining Tourism as a Pathway to Pakistan's Economic Growth

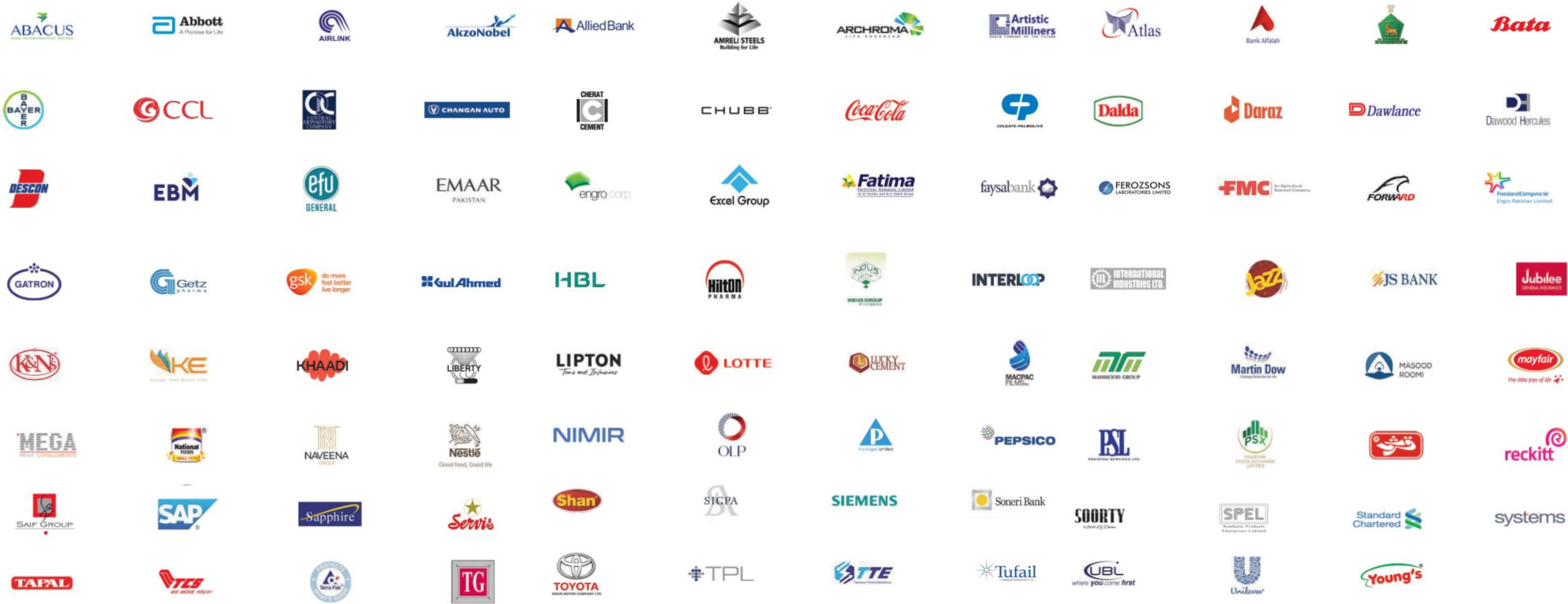
14th April, 2025

About the PBC

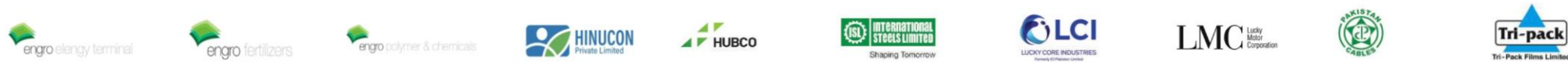
The Pakistan Business Council (PBC) is a research-based business advocacy platform established in 2005. It is now supported by over 100 private sector local and multinational businesses with significant investment in, and long-term commitment to sustainable growth of the country. The PBC members come from 14 countries, have leading roles in 17 major sectors of the formal economy, generate 40% of Pakistan's annual exports, contribute a third of Pakistan's total tax revenues and employ three million persons.

Their combined sales represent every 9th Rupee of Pakistan's GDP. PBC's major objectives are to advocate policies that lead to the creation of jobs, value-added exports and reduction in import reliance through improved competitiveness of manufacturing, services and the agriculture sectors. It also promotes formalization of the economy. PBC's over-arching theme, "Make-in-Pakistan" consists of three pillars: "Grow More/Grow Better", "Make More/ Make Better" and "Serve More/Serve Better." Its evidence-based advocacy is backed by over two hundred and fifty studies to date through its full-time research team, supplemented by collaborative research with renowned industry experts and economists.

The PBC Member Companies



The PBC Member Affiliates



Introduction to the Study

This report titled “**Promoting International Religious Tourism to Pakistan**” is a part of **PBC’s Make-in-Pakistan** initiative. One Pillar of which is to ‘**Serve Better**’

Secondary desk research was complimented with **qualitative interviews** of the Religious Tourism Industry Participants.

The report is **the 4th in the PBC’s series on the services sector**, which covers Pakistan’s Travel services and tourism for personal reasons with a primary focus on the **potential of Pakistan’s Religious Travel services & the tourism sector**



Global Religious Tourism

Global Religious Tourism Market

- **What is Religious Tourism?**

The industry is associated with pilgrims affiliated with a particular faith visiting sacred places. Apart from this, it also includes nonreligious tourists that visit sacred sites due to their cultural, historical and religious significance (Khan, 2018).



Estimated Worth \$16.1 billion in 2024



Projected Growth between 2025 and 2034 at a CAGR of 9.1%



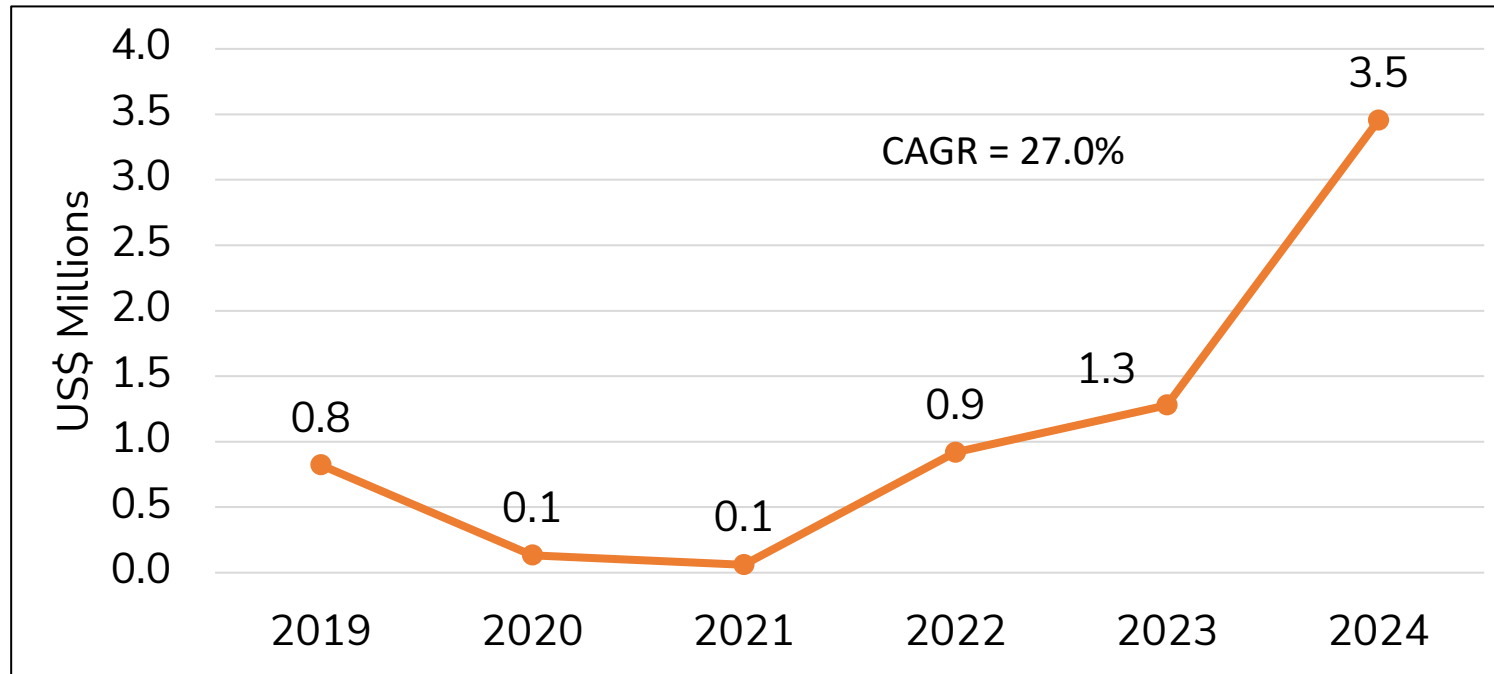
Makes about 26.0% of all tourism flows
(2018 est.)



Religious Tourism in Pakistan

Religious Tourism in Pakistan

Religious Travel Exports from Pakistan – 2019 to 2024

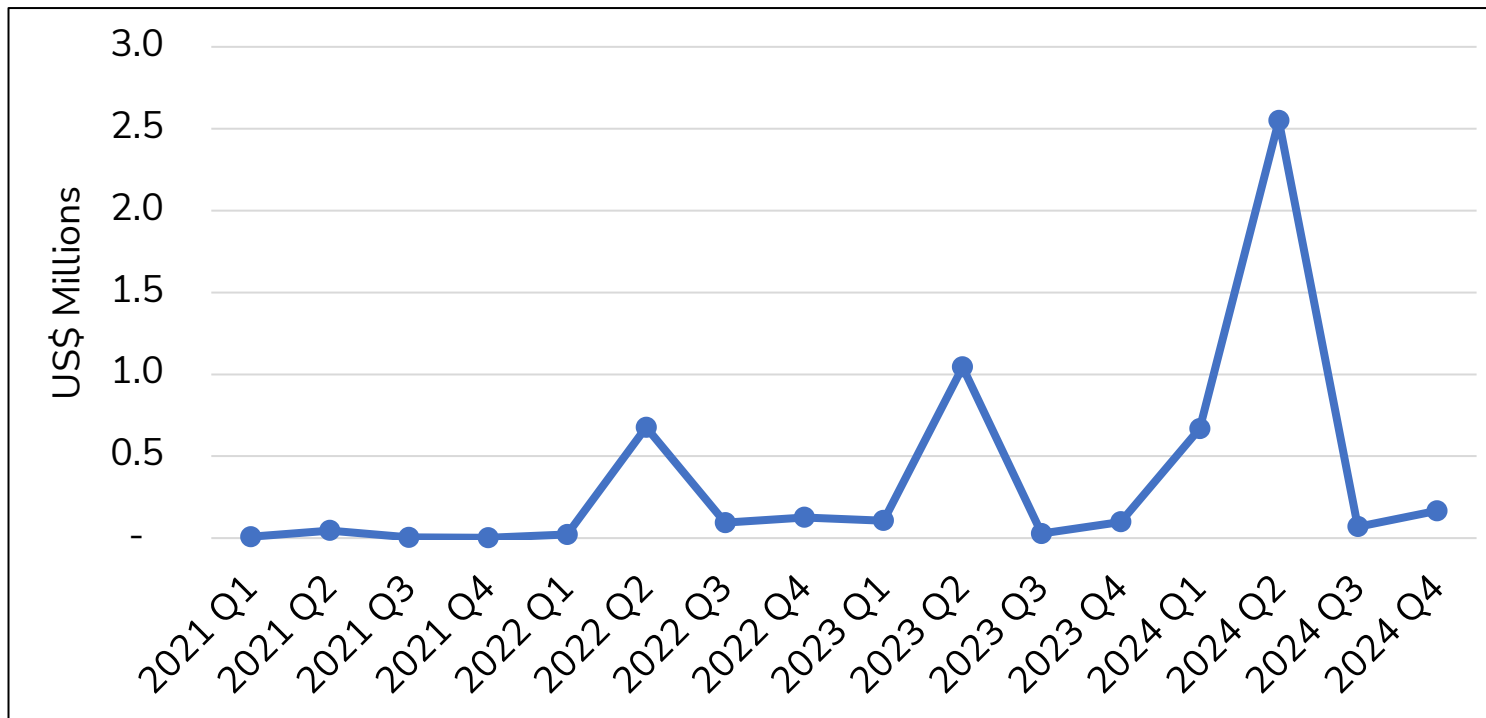


Source: State Bank of Pakistan

- Religious Travel Exports from Pakistan amounted to **\$3.5 million in 2024**.
- A **CAGR of 27.0%** has been witnessed in the religious travel exports between 2019 and 2024.
- This rise in religious travel exports is most likely attributed to the surge in Sikh pilgrims from 2022 to 2024, **which can be seen in the seasonality of the exports**.

Seasonality in Pakistan's Religious Tourism

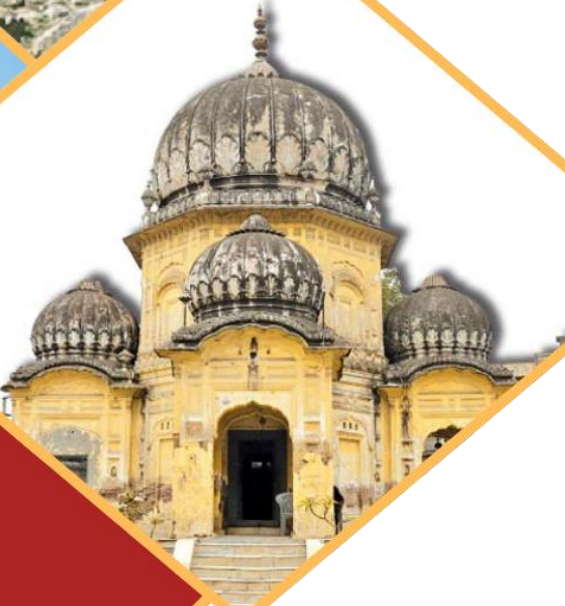
Religious Tourism Exports from Pakistan, Quarter Wise – 2021 to 2024



Source: State Bank of Pakistan

- Surges in Religious Travel Exports were seen in the **1st and 2nd Quarters of 2022, 2023, and 2024.**
- Mostly due to a major event for Sikhs is the **Baisakhi or Vaisakhi Mela** which is from April 12th and is a 3/4-day event.
- In **2023, 10,000** and in **2024, 35,000 Sikh pilgrims** from all over the world reached for the Mela.
- **Hindu Festivals of Maha Shivaratri, Holi, and Navaratri** also occur during the 1st and 2nd quarters.

Potential of Religious Tourism in Pakistan



Pakistan's Religious Tourism Potential

India is estimated to have 6-10% share in the Global Market for Faith-Based Tourism.

Pakistan is home to several religious sites similar to India.

Major Religions:

- **Buddhism**, **Sufism**, **Sikhism**, **Hinduism**, **Christianity**

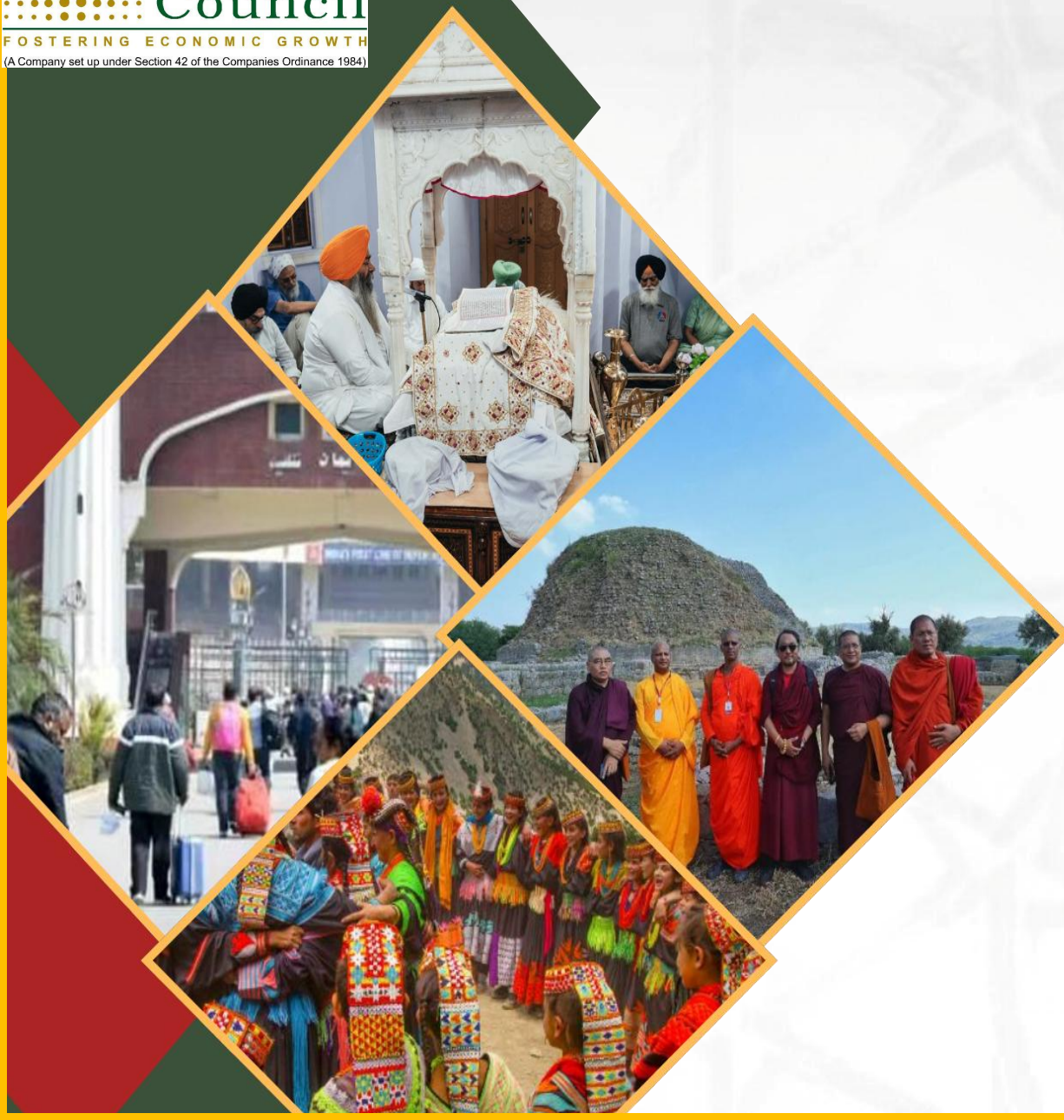
Lesser Promoted Religions in Pakistan:

- **Jainism**: There are several Jain Shrines present in **Lahore, Multan, Sialkot, Bhera, Kaur, and Jhelum. Only 1 or 2 are functional in every Punjab city, most demolished.**
- **Zoroastrianism (Parsi)**: No attempts have been made to restore the Jandial Temple in Taxila, which dates back to the 1st Century.
- **Kalash Religion**: Unique to Pakistan



Major Potential International Markets for the Major Religions in Pakistan

Buddhist	Sufi	Sikh	Hindu	Jain	Zoroastrianism
South Korea	India	India	India	India	India
China	Indian and Pakistani diaspora in U.K., U.S.A., Canada, Australia and European countries	Indian and Pakistani diaspora in U.K., U.S.A., Canada, Australia and European countries	Indian and Pakistani diaspora in U.K., U.S.A., Canada, Australia and European countries	Indian and Pakistani diaspora in U.K., U.S.A., Canada and European countries	Indian and Pakistani diaspora in U.K., U.S.A., Canada and European countries
Vietnam	Iran			Iran	Iran
Thailand	Afghanistan				
Japan	Turkey				
Sri Lanka	Malaysia				
Myanmar	Singapore				
	Bangladesh				



Industry Insights

Major Findings

Visa Application Procedure for Pilgrims is Tedious

- As specified by Nadra, Sikh pilgrims should come in person to verify a long list of documents to the nearest mission**

Government Entities are Interfering rather than Facilitating:

- Pilgrims are required to register at every police station (Form C issued at Wagha Border)**
- Restrictions on entry at certain religious sites**

Restrictive Visa Policies:

- Indian citizens are brought in on set quotas during festivities, private tour companies cannot contact them**
- Hindu PR holders are not given visas to visit Sikh religious sites**

Unfavorable Law and Order and Security Conditions in the Country

- Street crimes discourage pilgrims from returning especially Buddhists**

Major Findings

Too Much Focus on a Few Religious Sites

-Prioritizing a few religious sites has led to the ruin or conversion of many others

Lack of Facilitation of Tour Companies

-High licensing barriers for tour operators lead to unlicensed fraud, while religious travel licenses fail to distinguish between exporters and importers.

Lack Facilities, Hotels and Infrastructure around the Sites

- Poor facilities and infrastructure around Pakistani religious sites, especially during festivals, discourage foreign tourists.

Lack of Proper Research and Planning on Site Restoration

-Restorations of sites are not respectful of the religious sentiments, sensitivities of climate and structural requirements.

Lack of Private-Public Partnership Initiatives

-Weak government involvement, lack of trust in official entities, and insufficient literature



Recommendations

Recommendations



Devise and Implement Effective Marketing Strategies

- Need to invest in **documentaries, movies, and readable material** for the promotion of religious tourism.
- **FAM trips** should be organized to engage foreign tour operators.

Government Needs to Act as a Facilitator

- Management of religious sites should be handed over **to its' respective communities**.
- **Insurance cover** should be offered in case of flight cancellations.
- Government should **fully sponsor, offer guidance and support tour operators during international travel exhibitions**.

Create and Market Events throughout the Year

In order to encourage investments in **infrastructure, facilities, and renovations of the religious sites**

Improve Performance of Pakistani Embassies

Pakistan's embassies need to work together with the tourism department to promote religious tourism especially during the dates of the festivities of Sikh, Hindu and other religions.

Improvements of Religious Sites

- Significant Improvements required in **Infrastructure, Facilities and Medical Services**.
- Prepare Sites for **Festivities**.
- **Activate Some** of the In-active Religious Sites
- **Restore** Sites with **Proper Planning and Research**

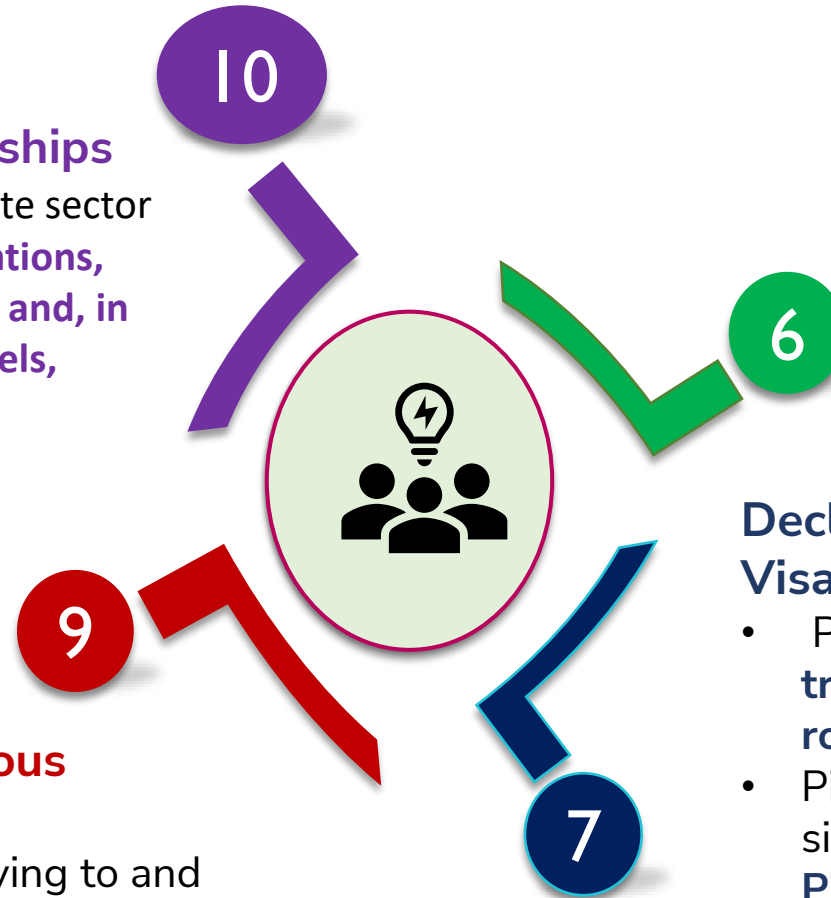
Recommendations

Encourage Public Private Partnerships

The government needs to involve the private sector in its **advisory boards, committees, renovations, creation of reading materials, fund raising and, in the construction, and management of hotels, guest houses, roads, and hospitals.**

On-Arrival Facilitation of Religious Tourists:

- **Transit Visas for Sikh Pilgrims** flying to and from India
- **Dedicated Air Corridor for Indian Pilgrims** Visiting Pakistan for Religious Tourism.



• Changes in the Religious Pilgrim Visas

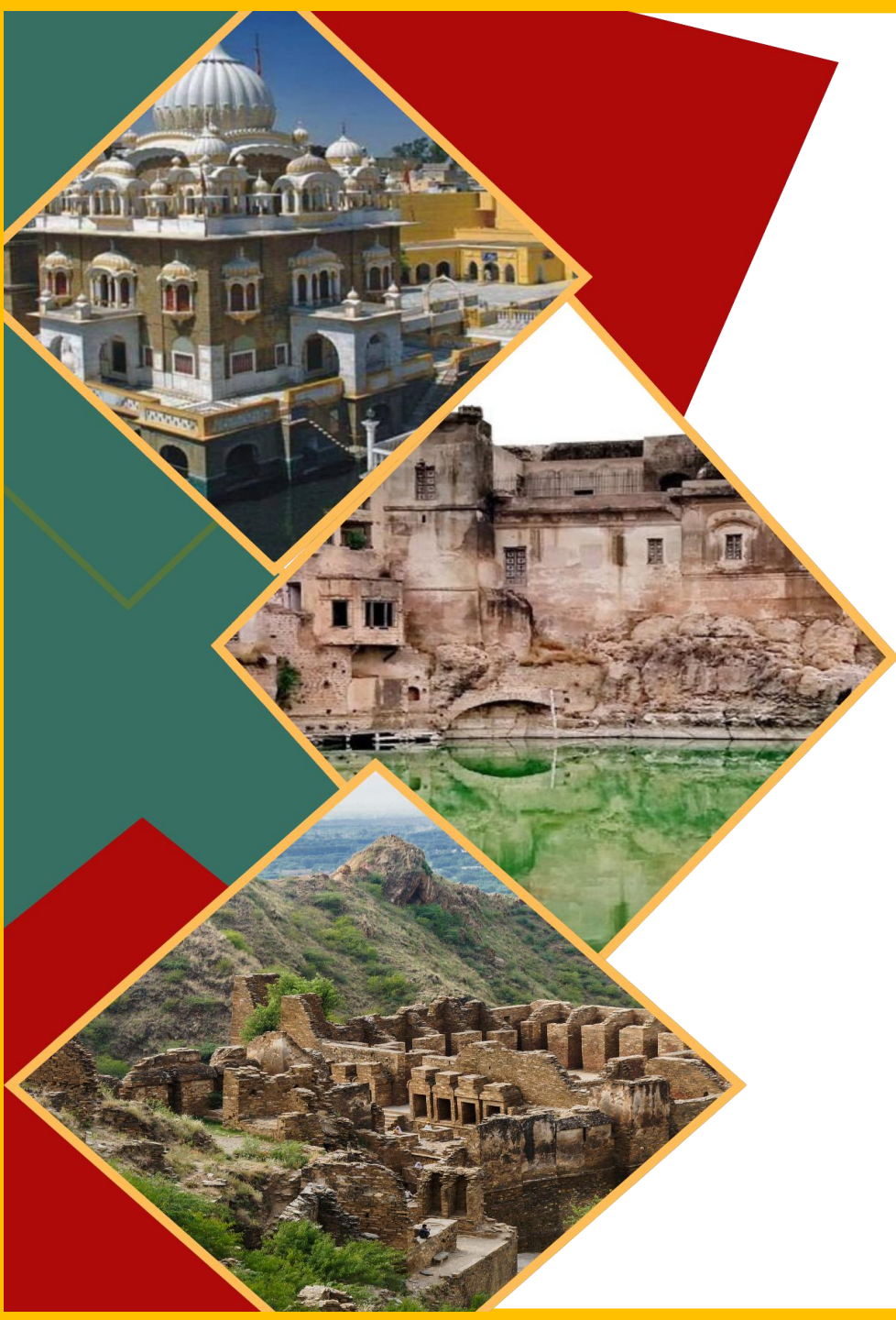
- Current Nadra system only covers **Sikhism- should cover all religions.**
- Instead of Sikh Pilgrim it should state Pilgrim Tourist

For Indian PR Pilgrims:

- No police reporting required
- No visa fee
- Visa should be issued within 24 hours

Declare Pilgrim Tourist Visa as Privilege Visa:

- Pilgrims will not be followed by **agencies, transport carrying pilgrims will not be asked route permits**
- Pilgrim Tourist Visa will allow pilgrims to visit all sites as normal tourists do (**mentioned on Pilgrim Tourist Visas to avoid confusion for state departments**)
- **No entry fees to sites** after showing Pilgrim Tourist Visa
- Launch of **Group Pilgrim Tourist Visas**



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Thank You
