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## PUNJAB'S TOURISM POLICY IN FOCUS: AN IN-DEPTH ANALYSIS

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### ABSTRACT

*The tourism industry has gained immense popularity in the 21<sup>st</sup> century and for many developed and developing countries owing to its socio-economic dividends. Tourism requires systematic planning for its development. The purpose of tourism planning is to efficiently manage the supply and demand of tourism in the area. Tourism policies are formulated to include tourism planning to increase tourism in the country. This policy paper analyzes the Punjab Tourism Policy, 2019. The Punjab Tourism Policy 2019 was formed with a view to providing a holistic and cross-cutting framework for strengthening the tourism infrastructure and improving governance and regulation regime. The policy aimed at promoting a soft image of the province and Pakistan and attracting more foreign as well as local tourists for overall economic uplift and well-being of communities. The review of the policy and analysis of the available information and data shows that considerable progress has been made in the tourism sector of Punjab. There has been some investment in the physical infrastructure of existing sites and new attractions have been identified and development started. A separate Department of Tourism and Archeology has been created and subordinate organizations like TDCP, DTS, etc. are being revitalized. Moreover, various steps including but not limited to outsourcing of resorts by TDCP, and installation of safety measures such as Punjab Tourism Squad by DTS, have been initiated. Despite significant progress, various factors have hindered the achievement of set goals owing to political, administrative, and financial factors. It is high time that the government took stock of the situation by mid-course review of the policy to remove bottlenecks that hinder the realization of the full potential of the tourism sector.*

**Keywords:** Punjab's, Tourism, Policy, Analysis

### INTRODUCTION

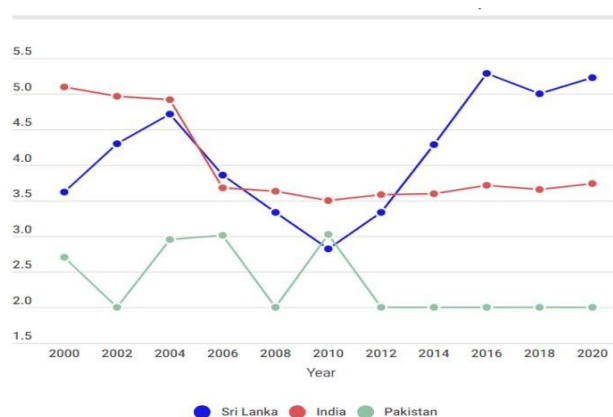
Since many developing nations believe that tourism has the potential to help them overcome economic challenges, tourism is fast becoming a priority sector. In such countries, tourism policy and planning are extremely important to prevent resource depletion, unsafe activities, and wasteful development. Due to its role in economic growth and job creation, tourism has emerged as a crucial industry worldwide. For emerging nations, tourism offers significant prospects as one of the fastest-expanding industries. It boosts living standards, adds new jobs, brings foreign exchange, and helps reduce poverty. Recently, traveling has gained popularity on a global scale for a variety of reasons. Nowadays, there are many different types of tourism activities available, such as historical, natural, health, thermal, sporting, cultural, and educational. In order to promote world peace, educate people, safeguard the environment, and preserve traditional and historical monuments, tourism activities could be increased. Additionally, tourism boosts

employment locally, hastens socioeconomic growth, spreads well-being, and reduces migration. Through its contribution to carbon-clean operations, tourism is also crucial for the economy's transition to a green economy. Tourism, as the UNWTO emphasizes, "means jobs, infrastructure, trade, and development".

The travel and tourism industry contributed directly to the national economy of Pakistan in 2021 to the tune of PKR 1300 million (3.7% of total GDP), according to the World Travel and Tourism Council's (WTTC) Economic Impact 2022 report. Nearly 3.3 million jobs were directly created in the sector in 2021, accounting for 5.1% of all employment, and 140 billion Pakistani rupees were generated from investment in tourism. Being the top destination for international travelers, Punjab claims a sizeable portion of these contributions. Furthermore, if the sector continues to grow at the rate predicted by the WTTC, it is estimated to contribute PKR 4.2 trillion to the nation's economy by the year 2028 (WTTC, 2021).

A sizable portion of Pakistan's GDP is contributed by the Punjab's provincial economy. The tourism industry is the mainstay of the economy and a significant factor in the development of many nations, like Turkey, Thailand, Malaysia, and others. The UNWTO's World Tourism Barometer estimated that there were 900 million more travelers worldwide in 2022 than there were in 1964. Pakistan, however, missed this growth trajectory, and as a result, the tourism industry has not been able to fully contribute to Pakistan's development.

According to TDCP, there are about 146 religious sites located in Punjab still it lags behind India, Sri Lanka, and the region (Figure 3). The development of the existing and new sites and a range of related cultural and economic activities, would not only draw higher-paying domestic and foreign tourists but also contribute to the reduction of economic inequities.



**Figure 1**  
*Travel and Tourism's Direct Contribution to GDP*

The Punjab Tourism Policy 2019 was formulated with the vision to uplift the economy of Punjab through an inclusive development approach. The Government of Punjab realizes that with the correct policies in place, Punjab can realize its untapped potential and contribute towards the economic growth of the province. This policy paper reviews the Punjab Tourism Policy, 2019 and analyses the effectiveness of the policy's implementation. The study focuses on the relationships

between policy implementation, the state, and society and aims to suggest ways forward to bridge this gap for effective policy implantation and development of the tourism sector.

The tourism sector of Pakistan has the potential to contribute to the improvement of the country's socio-economic development. Domestic tourism has historically remained neglected in so far as investment, marketing, and development are concerned. It has not optimally attracted travelers to explore the rich heritage, exotic hill stations, and cultural and religious sites. With a coherent and well-thought-out tourism policy and its effective implementation, this potential can be tapped. In 2019, the Punjab Tourism Policy was formulated with the purpose of increasing economic growth through tourism. The policy lays emphasis on institutional reforms and enhanced investment to improve the tourism infrastructure and governance in Punjab. Although, the policy has achieved considerable milestones, yet a wide range of challenges hinder not only the implementation of the tourism policy but also the overall development of the sector.

In connection with this, an analysis is needed based on several theoretical concepts and research results as described below; Guo et al. (2019) claim that Mathews' 1975 essay "International Tourism and Political Science Research" in the *Annals of Tourism Research* marked the beginning of the study of tourist policy. Goeldner (2012) defined tourism policy as a set of rules that directly influence the long-term development and day-to-day operations of a tourist destination. Sessa (1976) defined tourism policy as the actions planned and carried out by various related agencies to achieve specific goals of tourism development. Hall and Jenkins (1995) also defined tourism policy as the government's decision-making behavior in the tourism field. It is challenging to create a cohesive research framework because the idea of tourist policy is vague and the field of tourism policy study is relatively large. There is no widely acknowledged definition of tourist policy. Borrelli et. al., (2011) state that tourism planning, as in every plan, is prepared to achieve specific objectives by using existing resources and programs to meet the needs and desires of people. Tourism would have both beneficial and negative effects on a region or nation, but negative effects may be minimized or even eradicated via thoughtful policy development and planning. One of the primary goals of tourist policy and planning can be summed up as developing, evaluating, and directing tourism supply effectively to the development of the nation's economy (Demirkol et al., 2014). Success in tourism depends on the planning, management, and marketing of destinations or organizations as a whole, regardless of their size (Polat et al., 2017).

According to Polat et al. (2017), tourism is an area that calls for a coordinated effort. Political instability is also a concern as the same has a direct impact on tourism. The need for coordinating and regulating the interests of various stakeholders involved in the growth of tourism

grows stronger as more passengers and tourists move throughout the globe. Policies offer a course of action to direct choices and produce logical results (Ismet et al., 2016). According to Krutwayshe, O. (2003), economic considerations have dominated much of the study on tourism policy. The wide spectrum of political, environmental, and social ramifications for tourism were purposely ignored or underappreciated in early tourism legislation. Governments at all levels, from the federal to the municipal, frequently devoted more energy to marketing tourism plans than to the possible drawbacks. The social, economic, and environmental implications of tourism, besides the welfare of locals and the competitive focus of entrepreneurial tourism tactics, are the current focus of tourism policy study. Recent events demonstrate that environmental and sociocultural concerns, along with the preservation and protection of the environment and the distinctiveness of a country or region, should all be given due consideration in tourism policy.

Given that tourism is a rapidly expanding and diverse industry, the way it is developed in a low-income country frequently sparks heated discussions. In the developing world, bureaucratic initiatives frequently institutionalize and manipulate tourism (Liu & Wall, 2006). Additionally, there are concerns with the insufficient consideration given in tourist policies and planning to the various stakeholders and the local aspects (Singh et al., 2002). It is also clear that many tourist strategies are intended to increase visitor numbers instead of any focus on equity.

*International Best Practices*, Orozco J. (2016) mentions that the successful formulation of tourism policies is an important step in the meaningful implementation of tourism initiatives. Following consultation with several Ministries, Boards, and pertinent Regional and International Agencies, many nations, like Barbados, Dominica, Belize, Sri Lanka, Turkey, Costa Rica, St. Lucia, and Trinidad and Tobago, have produced successful tourist policies. The successful standardization of procedures and practices within the specific tourism industry targeted by the policy is one of the main goals of creating a tourism policy. This standardization promotes consistency and agreement on procedures that may increase sustainability and enhance the overall quality of tourism services. Making sure that the local community is adequately engaged in tourism activity in order to provide enhanced socio-economic benefits is one of the top priorities when developing sustainable tourism strategies.

Turkey's tourism vision calls for three goals by 2023: first, to make tourism the leading industry for job creation and regional growth; second, to establish Turkey as a new and distinct brand in the world; and third, to position Turkey among the top five travel destinations in the world for foreign tourists. Planning, investment, organization, research and development, strengthening of service, transportation, infrastructure, advertisement and marketing, education, tourism

diversification, and improving tourism destinations are all envisaged in Turkey's tourism strategy for 2023 (The Culture and Tourism Ministry of Turkey, 2007), (Keskin A. et al., 2010).

According to Sri Lanka's National Tourism Policy, the country's 1,585 km coastline, eight UNESCO World Heritage Sites, and the wealth and diversity of its cultural and natural legacy make it an ideal destination for tourists. The policy aims to provide a wide range of opportunities for strategic change in the tourism industry, including improved governance efficiency, competitive wages, new marketing techniques, new travel products, and markets. It also aims to promote climate- and nature-conscious development, increased connectivity, and more transparent and effective private-sector participation.

Based on the problems described, this researcher raises research questions; *First*, How far has the Punjab Tourism Policy 2019 been successful in achieving its stated goals? *Second*, What is the way forward for the effective implementation of the Tourism Policy to realize the full potential of the sector in Punjab? with the scope of the paper, namely: The Policy Paper is confined to the review of the Punjab Tourism Policy 2019 only. For this purpose, data from the last five years has been obtained and analyzed. This paper does not touch upon the tourism sector of other provinces.

## **METHOD**

This research is analytical in nature and is based on qualitative research methodology; it utilizes both primary and secondary data sources. Primary data was collected through semi-structured interviews, a list of questions was prepared (**Annex-A**) and focal persons from the relevant departments were requested to respond to the questions. Focal persons from the Directorate General of Archaeology and TDCP answered the questions. For secondary data, different research papers and other scholarly articles were studied and analyzed.

## **RESULTS AND DISCUSSION**

### **1. Punjab Tourism Policy at a Glance**

The Youth Affairs, Sports, Archaeology, and Tourism (YASAT) Department formulated the Punjab Tourism Policy in 2019. Later in 2020, the Tourism Department was separated and is now known as the "Tourism, Archaeology, and Museums Department". The focus of the Punjab Tourism Policy 2019 is the economic uplift of the province of Punjab by increasing employment, private sector investment, and attracting foreign and domestic tourists. The policy gives a SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats) of the Punjab province with respect to the tourism sector.

Salient features of the policy are listed below:

- The stated objectives of the tourism policy include:
  - Making tourism a provincial priority
  - Transforming tourism into the engine of economic growth
  - Updating and developing state-of-the-art infrastructure
  - Standardization of various tourism-related sectors
  - Building institutional capacity and improving regulation regime
  - Diversifying tourism destinations
  - Effective marketing and branding of new tourist sites
  - Developing new tour packages

- The policy specifies three reformlevers that can be used to support the growth of the tourism industry: first, revamping the institutions; second, modifying the rules; and third, providing the necessary funding. The Reform Framework envisaged in Punjab Tourism Policy 2019 can be seen in Figure 2.



**Figure 2**  
*Tourism Reform Framework*

- Additionally, it provides a package of institutional reforms for the tourist industry based on three main tenets: a) guaranteeing coordination and alignment between the federal and provincial governments; b) enhancing fundamental governance capabilities of the provincial government for management of the tourism industry; and c) integrating private sector-led growth.
- Moreover, the government has made a commitment to limiting its role in service delivery, which unintentionally distorts competition, in order to provide the required room for private sector growth. It aims to draw in more private-sector investment flows and accelerate growth.
- The policy outlines the Government of Punjab's overall strategy for the growth of the province's tourist industry, as well as sector-specific, location-specific, and event-specific strategies.
- Finally, the government sought to revitalize the department to spearhead the reform initiative by building the capacity of organizations like TDCP and DTS to achieve policy goals.

## **2. Achievements by The Department**

### **A. Tourism Development Corporation of Punjab (TDCP):**

The government of the Punjab approved the “Outsourcing Policy” for Government Rest Houses or Guest Houses in September 2021. This will open avenues for private sector investment under the PPP model. TDCP has entered into agreements with the Forest and Irrigation Departments, wherein, the potential tourist sites of these Departments are being allocated to TDCP for project planning and ultimate outsourcing to the private sector through open tendering for development and operations for a period of 20 years.

#### **a. The Following New Tourist Infrastructure Has Been Built After 2019:**

- Development of tourism infrastructure at Daudkhel District Mianwali.
- Installation of zipline facility at Daudkhel District Mianwali and Changa Manga District Kasur.
- Development of a Tourist Resort at Dharabi Lake District Chakwal (in progress).
- Parkway project and boating safari at District Rahim Yar Khan (in progress).
- Development of a Tourist Resort at Derawar Fort, District Bahawalpur.
- Parkway project at Kotli Sattian, Narr Kahuta District Rawalpindi.
- Parkway project at Koh-e-Suleman District D.G Khan.
- Installation of Glamping Pods at Patriata, Dhanoi Kotli Sattian District Rawalpindi, Khabeki, Kanhatti Garden Soon Valley District Khushab, and Changa Manga District Kasur.
- Provision of two convertible and two closed top tourist buses for tourist facilitation.
- Some other equipment includes zip lining, golf carts, desert safari, and boating safari provided at different destinations.

#### **b. The Following Safety Measures Have Been Installed:**

- Launching of Punjab Tourism Squad.
- Training of Patriata Chairlift operators Kallar Kahar, Khabeki, and Daudkhel boating staff through Rescue 1122 for tourist safety and making training a regular feature for continued focus on safety aspects.
- Directional/Informative boards for tourist facilitation installed at different locations of Murree and other destinations for tourist guidance.

#### **c. The Following Measures Have Been Taken for Tourism Promotion:**

- Launching of Tourism App.
- Signing of MoU with Bookkaro.com for online booking of TDCP’s DoubleDecker Bus Service and other facilities.

- The agreement signed with PITB for queue management and online booking of Patriata Chairlift and Cable Car tickets (work in progress).
- 7 SMDs installed in the Murree region for information like travel advisories, weather updates, traffic plans, etc.

**d. Workforce Training Under the Institute of Tourism and Hotel Management (ITHM):**

- Total workforce trained from 2019 to June 2023 is 1121.
- Regular Courses: 363
- NAVTTC Program: 275
- Other short Training; 543
- Four ITHM franchises set up in Faisalabad, Gujranwala, Multan and Rawalpindi.

**e. TDCP Has Also Upgraded The Following Tourist Sites:**

- TDCP Resort Fort Monroe.
- TDCP Resort Changa Manga.
- TDCP Resort Jallo (work in progress).
- Lakhwal rest house (work in progress)
- Dharabi rest house (work in progress)
- Dhok Tallian rest house (work in progress)
- Dhanoi rest house (work in progress)
- Taxila rest house (work in progress)
- TDCP Kallar Kahar resort (work in progress)

**B. Directorate General of Archaeology**

**a. The Following New Infrastructure Has Been Installed At The Sites:**

- Construction of auditorium at Taxila Museum, Harappa Museum and Allama Iqbal Museum.
- Development of infrastructure at Nandana Fort (Hiking track and approach road walkway, Ghazebos, toilet block).
- Development of jeep track and parking area at Rohtas Fort.
- Development of Mughal Garden Wah (walkways, parking, approach path and children play area) (In progress)
- Development of Tulaja Fort Khushab (Jeep track and hiking track and establishment of viewpoint). (In progress).
- Construction of approach road from GT Road to Mankayala Stupa with collaboration of PTEGP.



- Construction of Entrance Gate at Taxila Museum in collaboration with PTEGP.
- Construction of new Museum at Multan and Harappa (in progress).
- Provision of Heritage Rickshaws and Golf Carts for tourists at most visited site like Shalamar Gardens, Jahangir Tomb, Noor Jahan Tomb, Hiran Minar, Rohtas Fort, Harappa Museum, Taxila Museum.

**b. The Following Safety Measures Have Been Installed:**

- Provision of walk-through gates at important heritage sites.
- Provision for Metal Detector and Installation of Fire Alarm System and CCTV Camera System at Harappa Museum, Sahiwal.

**c. The Following ICT Initiatives For Tourism Promotion Have Been Taken:**

- Geo Mapping of key heritage sites
- Documentaries of 08 key Heritage Sites
- Webinars for awareness of heritage Sites
- Development of Website and Social Media pages

**d. The Following Improvements Have Been Brought To The Current Tourist Sites:**

- Provision of Public Facilities (like benches, dustbins, canopies, and drinking water facilities at important Heritage Sites of the Province.
- Illumination of key Heritage Sites.
- Provision of Public Toilets at Kallar Kahar Museum.
- Installation of direction boards on the roads leading to the historical sites (in collaboration with PTEGP)
- Establishment of Deer Observatory at Hiran Minar, Sheikhpura
- Improvement of Taxila Museum (Upgradation of Museum Galleries, Cafeteria, Public toilets, Children's Play Area, benches, dustbins, drinking water facilities etc.)
- Conservation and Preservation of Shahadara Complex of Monuments. (In Progress).
- Conservation of Archaeological Sites of Taxila. (In Progress)
- Preservation and Conservation of Rohtas Fort. (In Progress)
- Conservation and Preservation of historical monuments (Tomb of Nadira Begum, Tomb of Nawab Bahadur Khan, Losar Boali Wah Cantt, Bahar Wali Boali, Kharian, Chitti Masjid Rahim Yar Khan, Boali at Wan Bachra, Mianwali).

**3. Critical Appraisal of the Punjab Tourism Policy 2019**

The Punjab Tourism Policy 2019 has touched upon the key areas of the tourism sector in the province. The policy recognizes a clear status of tourism in Punjab and it provides the strategy

required to make tourism successful in Punjab. The policy provides an implementation framework that if worked upon by departments could yield positive results. After the formation of the policy, some improvement has been brought to the tourism sector of Punjab. The Tourism, Archaeology and Museums Department was formed to focus on tourism in the province. Secondly, the role of the Department of Tourist Services (DTS) has been enhanced from just a licensing firm to managing the Punjab Tourism Squad. Other results achieved by TDCP and the Directorate General of Archaeology have been discussed in detail in the preceding paragraphs.

Although considerable improvement has been made, still there is a long way to go. For instance, the privatization of resorts is a positive move by TDCP and it can lead to an increase in revenue and better upkeep of the facilities. However, there have been several stumbling blocks in this regard, and evidence as to the increased revenue is not yet fully available. Despite the Punjab Tourism Policy 2019 in place for four years and efforts to ameliorate tourism in Punjab and overall Pakistan, the tourism sector still lags behind when compared to other countries in the region as shown by Figure 3. On the other hand, Pakistan's performance in tourism shows that it ranks low on most of the indicators as shown by Figure 4.



**Figure 3**  
*Regional Share of Tourism*



**Figure 4**  
**Pakistan Performance Review**

This clearly shows that a lot more is needed to be done to achieve the stated objectives. Part of the problem has been political stability in the province since early 2022. This has resulted in frequent transfers of government officials including the Secretary of the Departments and heads of TDCP and Archeology.

Although the Punjab Tourism Policy 2019 is currently in effect, there is a need for its midcourse review and to transform it into a policy that is coherent, integrated, and in line with the pertinent sectoral policies while also acknowledging the trans-sectoral nature of tourism. This is necessary to achieve sustainable growth and a more inclusive sector for all stakeholders. In order to achieve the desired results, the following measures are recommendations for all relevant departments and stakeholders.

*The first is* that the tourist policy should be consistent with current government policies and should provide a mechanism for the several ministries, associations, and stakeholders to assess their individual contributions to the sector's ability to develop sustainably. National policies, development strategies, and international agreements should all be taken into account.

*Second;* The government needs to reenergize the tourism department to spearhead the reform agenda and play a crucial role in the capacity building of DTS and TDCP in order to achieve the tourism policy. It is crucial to improve the institutional mechanisms at the Tourism Department, DTS, and TDCP to make these organs more vibrant to play facilitation and regulation roles in an

effective and efficient manner. This will help make tourism a catalyst for the economic growth of the province.

- a. In order to gain a competitive edge for the promotion of tourism in Punjab, human resource management is of prime importance. In today's quality-driven environment, only a motivated, empowered, and trained team can contribute. In order to implement the policy guidelines, the government should hire a pool of efficient and professional individuals at competitive market remunerations.
- b. The Institute of Tourism and Hotel Management's (ITHM and COTHM) capacity is insufficient given the lack of human resources in this sector. By building tourism and hospitality institutions, it is suggested that a competitive atmosphere may be created to encourage the private sector to engage in human resource development.
- c. The government should concentrate on creating high-quality tourist infrastructure and supporting infrastructure, including local transportation and tourist service infrastructure, possibly through PPP models, enabling better management of facilities, developing sustainable models, and increasing private sector involvement through specialized contractors and improved supervision.
- d. A communications strategy promotes the proactive involvement of many stakeholders, such as government agencies and ministries, the private sector, established performers, specialists, and practitioners from the creative and heritage industries, service providers and suppliers from the tourism and hospitality sector, civil society, development organizations, financial institutions, and communities, among others. In order to promote tourism, a communications and outreach strategy should be implemented.
- e. On the demand side government needs to aggressively market the tourism potential of the province. In particular, the department should target the Sikh diaspora in the West, Buddhist tourists in Southeast Asia, and Western tourists to attract them to explore the rich heritage and tourist sites. It should be a three-pronged framework for designing and implementing a cohesive, thorough, and distinctive communications and marketing plan that reaches out to potential tourists.
- f. The tourism policy suggested a mid-course review of the Punjab Tourism Policy 2019 after two years. This review needs to be undertaken by the Tourism Department Punjab through a third party so that the achievements are recorded and the bottlenecks can be identified.

## **CONCLUSION**

The Government of Punjab aims to tap the enormous economic potential of the tourism sector and realizes that to tap this potential there is a dire need to develop state-of-the-art tourist

services across all tourist sites in Punjab and the need for investment by the private sector to boost economic growth in tourism. The government understands that tourism will boost the economy and have a positive impact on communities if the right policies are in place and the business environment is investor-friendly. The Government of Punjab drafted the Punjab Tourism Policy in 2019 and a separate department was also formed for tourism to steer the revitalization agenda forward. The Punjab Tourism Policy is an ambitious document and has succeeded in achieving stated objectives to some extent. However, not enough evidence is available to suggest that the policy has been a great success in terms of bringing in positive changes in the economy. A host of factors including but not limited to political instability, insufficient investment and poor coordination among departments are responsible for the partial success of the policy. It is high time that the government took stock of the situation and prioritized tourism for the economic and social uplift of the province besides portraying a soft image of Pakistan and Punjab province around the globe.

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