

Sri Lanka Tourism Alliance's



Resilience Action Plan



Building a thriving
and sustainable
tourism industry.

"Tourism in Sri Lanka is an industry built on inclusivity. It's a way to connect and welcome everyone in the spirit of cultural peace and authenticity" – Sri Lanka Tourism Alliance

A practical plan to unite and assist the industry.

Resilience:
the capacity to recover
quickly from difficulties.



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“We need to focus on being united in the face of the tragedy and challenges we have experienced”

– Shiromal Cooray, Chairperson
Jetwing Hotels Ltd. and Co-Chair
Sri Lanka Tourism Alliance

On Easter Sunday,
21 April 2019, three
churches in Sri Lanka
and three hotels in the
commercial capital
Colombo were
targeted in a series
of terrorist attacks.

Out of this tragedy however has emerged something positive.

Like previous incidents in Paris, London, New York, Egypt, Christchurch and Bali, this one-off tragic event had an immediate and devastating impact on the tourism industry. International visitor arrivals to Sri Lanka initially dropped by 71% and the ongoing effect on the entire tourism industry supply chain continues to be felt.

Increased security measures were implemented, and all perpetrators apprehended.

Visitors are now slowly returning to the country that Lonely Planet crowned 2019's Best Destination in the World.

Out of this tragedy however has emerged something positive. A group of like-minded Sri Lankan tourism business leaders who have joined together to form the Sri Lanka Tourism Alliance.

Their common goal was to communicate that Sri Lanka is open for business with timely, relevant and useful information. Their first task was to create lovesrilanka.org and related social feeds, to provide up-to-date information for both the industry and potential visitors.

The goal of this document, the Love Sri Lanka Resilience Action Plan, is simple - to assist the whole industry move forward in a united, successful and sustainable way.

The intended results will be increased international visitation and spend from priority visitor markets that benefit the entire Sri Lankan tourism industry and visitor economy.

“The successful resurrection of a destination’s tourism industry depends largely on its ability to reshape the beliefs of international visitors.”

–Dr. Taleb Al-Rifai,
former secretary general UNWTO



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About the Alliance

The Alliance’s vision is to build a resilient and strong private sector that embraces international sustainable tourism best practices, and where tourism benefits are driven to communities and people across Sri Lanka at every level.

One voice

The Alliance’s aim is to lead with one united industry voice, and foster information, education and collaboration across the entire tourism sector.

For the Alliance, representing the whole tourism industry means;

- Both the formal and informal tourism sectors
- All tourism businesses ranging from start-ups right through to large operators
- Working alongside and supporting current tourism sector associations
- Embracing gender equality, social and cultural inclusion
- A truly national focus on visitor experiences across the country.

Our values

Inclusive, agile, innovative and collaborative.

Funding

The long term goal of the Sri Lanka Tourism Alliance is to be a self-sustaining organisation.

This first Resilience Action Plan will be funded via:

- The private sector
- International Donor Development Partners
- Industry participation fees for Sri Lanka Tourism Alliance events
- Potential joint government co-operative promotions and initiatives.

“Tourism in Sri Lanka is an industry built on inclusivity.”

– Malik Fernando,
Managing Director, Resplendent
Ceylon and Founder and Co-Chair
Sri Lanka Tourism Alliance



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Strategic context

In developing the Love Sri Lanka Resilience Action Plan, the Alliance draws upon the existing national 2025 Tourism Vision and 2020 Tourism Strategic Plan:

- **Vision** – To be the world’s finest island for diverse, authentic and memorable experiences
- **Mission** – To be a high value destination offering extraordinary experiences that reflect Sri Lanka’s natural and cultural heritage, and which drive economic benefits to communities and the country that are socially inclusive and environmentally responsible.

Guiding philosophy

- Position Sri Lanka as a higher value destination. Value is not just monetary value. It includes experience, authenticity, diversity, sustainability, green credentials, health, safety and community value.
- Ensure world-class preservation and management of tourism assets.
- Create memorable experiences rooted in Sri Lanka and its heritage.
- Dispel misconceptions about Sri Lanka being a seasonal destination, a round trip only or a destination still experiencing a civil war.

Transformation themes

- **Collaboration** – Improve institutional performance, governance and regulations. Strengthen cooperation, consultation and collaboration with the private sector.
- **Insights** – Improve market understanding and visitor segmentation.
- **Communication** – Marketing effectively across all channels.
- **Quality** – Lift industry standards across conservation, preservation and management of natural and cultural assets as well as private sector visitor experiences.
- **Sustainability** – Identify new transformative tourism development projects and signature tourism experiences.
- **Engaging** – Improve engagement with tourism workers, communities and stakeholders.

Authentic experiences

Leverage the destinations unique experiences around nature and wildlife, culture, trade, water, urban and wellness. Ensure that the people of Sri Lanka are celebrated and connected to all these experiences.

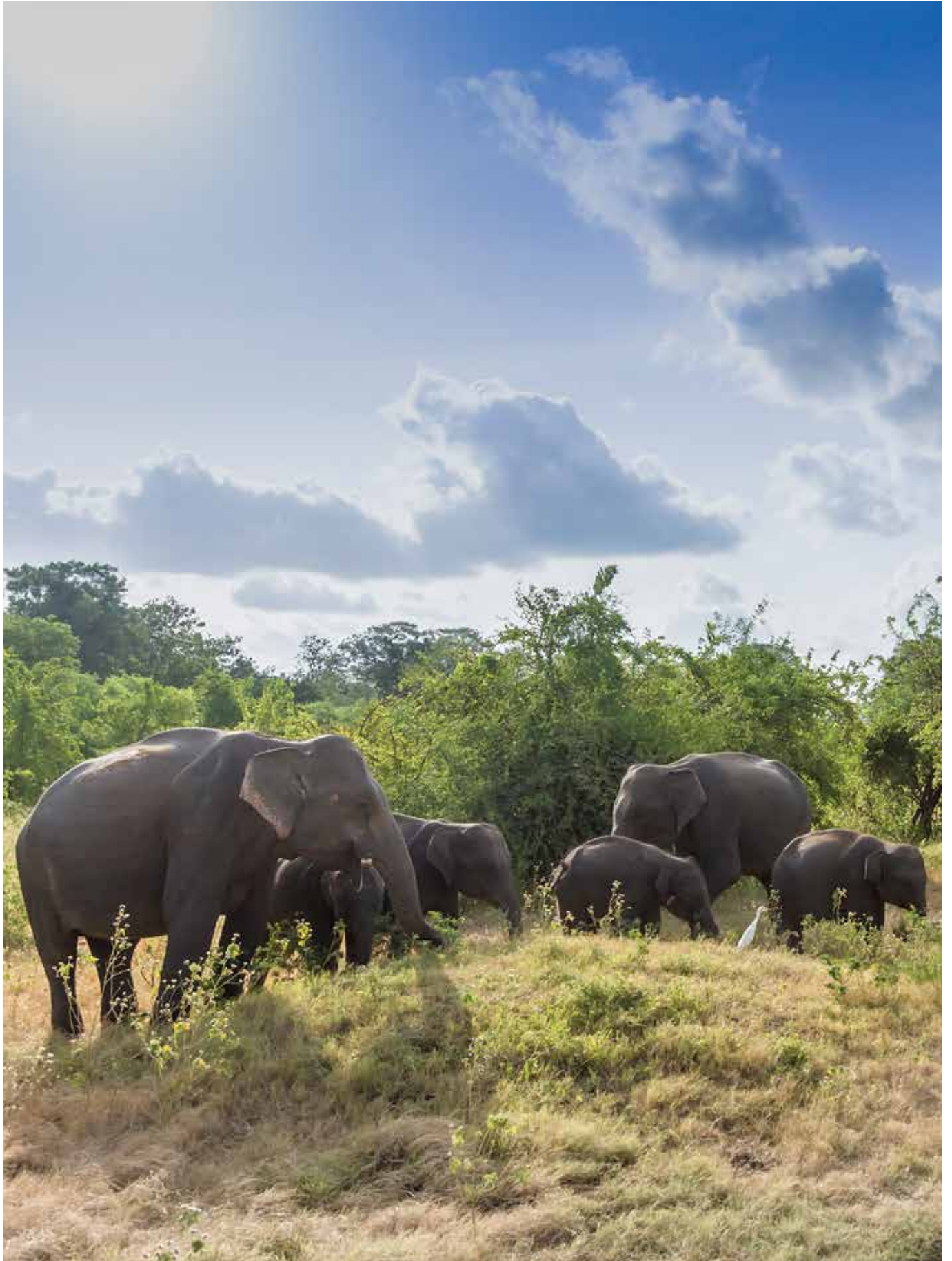
Markets

The Sri Lanka Tourism Promotions Bureau’s post crisis recovery public relations markets include:

- China
- UK
- Germany
- Austria
- Switzerland
- France
- Spain
- Australia
- Japan
- Benelux (Belgium, The Netherlands and Luxemburg)
- Italy
- Poland
- Ukraine
- Russia
- Gulf Cooperation Council Countries (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates)

Note: Ongoing work to identify priority markets based on value not volume is required. This is a key focus for the Alliance in the next 12 months.

Source: Sri Lanka Tourism 2025 Vision, Sri Lanka Tourism Strategic Plan 2020 and Sri Lanka Tourism Promotions Bureau



Two brands working together

The Alliance's Love Sri Lanka brand works in harmony with So Sri Lanka, to showcase the country's unique experiences.

- **So Sri Lanka** – A way to encompass the destination's unique message.
- **Love Sri Lanka** – A brand to demonstrate what is unique. The industry voice.

“This crisis provides the opportunity to reset our tourism industry, to refocus together on the right customers who spend more, stay longer and immerse in experiences that are unique to Sri Lanka”.

–Harith Perera, Diethelm Travel,
Sri Lanka Association of Inbound
Tour Operators, and Sri Lanka
Tourism Alliance



- Creating awareness of authenticity, diversity and compactness of destination Sri Lanka.
- Creating salience on a global scale for destination Sri Lanka.
- Enabling key stakeholders to market destination Sri Lanka using a singular proposition of So Sri Lanka.
- Engaging with online travel community, to create buzz and excitement for destination Sri Lanka.
- Engaging media stakeholders in creating valuable global content for destination Sri Lanka.



- Regional product development to drive authenticity, diversity and compactness of destination Sri Lanka.
- To create activism with local Sri Lankans to participate in creating authentic and diverse experiences and champion destination Sri Lanka.
- To mobilise internal stakeholders to build tomorrow's business based on purpose and sustainability.
- To support internal stakeholders in adapting So Sri Lanka brand to promote their own businesses.
- To step-in to explore agile PR and content opportunities where So Sri Lanka brand cannot leverage.

Source: Wunderman Thompson



Tourism insights

Pre attacks (2018 data)

\$4.3 TOURISM
RECEIPTS
BILLION (+11%)

388,487
TOURISM JOBS (+15.7%)

2.3 VISITORS
MILLION (+10.3%)

\$173.8 USD
SPEND PER DAY (2.2%)

Top 8 holiday markets

1. India	337,557
2. China	256,011
3. UK	200,129
4. Germany	134,474
5. France	93,937
6. Australia	73,458
7. Russia	60,015
8. USA	54,103

Post attacks (total visitor arrivals)

37,802
MAY 2019 71% ▼

63,072
JUNE 2019 57% ▼

115,701
JULY 2019 47% ▼

143,587
AUGUST 2019 28% ▼

Top 5 visitor volume markets (May-August 2019)

MARKET	VISITOR ARRIVALS	% CHANGE 2018
India	82,171	-40.5
UK	34,460	-51.0
China	21,514	-76.5
Germany	21,131	-38.5
Australia	18,499	-42.0

- Australia was the most resilient market in the first two months post the attacks, with the second highest arrival numbers behind India.
- The least resilient markets are China (-76.5%), Saudi Arabia (-67.5%), Netherlands (-54.1%) and the UK (-51%).
- International direct aviation seat capacity reduced by 13%. China reduced by 32% (July 18 vs May 19).

Source: SLTDA



Bouncing back from a crisis – global learnings

What can we learn from Paris?

The terror attacks in Paris on November 13, 2015 had a significant impact on their tourism industry. It took Paris over two years to fully recover its international markets and within 12 months domestically. The country spent €10 million in two years post the attacks promoting the destination.

Key learnings:

- Media monitoring with online tools is essential.
- Have dedicated social media resources to counter misinformation immediately.
- Use social media as a key tool – #Parisweloveyou online and in situ.
- Communicate and engage with all international trade and airline partners to provide clear messaging, support and toolkits for communication to clients.
- Survey potential visitors and review data to assess which markets are most likely to return first.
- Commence consumer campaigns in a phased approach, first domestic audiences, then existing visitors as ambassadors, international markets close by and finally longer haul priority markets.
- Focus on back to basic messaging – unique experiences.

- Secure key influencers, bloggers, trade and consumer media to visit and create positive stories.
- Reduce red tape – streamline visa processes.
- Promote a warm welcome on arrival and training for industry.
- Focus on value-adds not discounting to stimulate bookings.
- Repetition and consistency of messages by all stakeholders reinforces the destination is appealing and safe.
- Be prepared as an industry and country for any future crisis.

Source: WTTC

Positive change

The learnings from Paris are consistent with a global study of post-crisis recovery by Ritchie and Walter. This study also found that a crisis can present opportunities for positive change. This could include improved tourism government policies, new products, services, events, and most importantly, the opportunity to reposition a destination offering as higher quality.

“A coordinated effort is key, Paris worked with regional and national tourism authorities, companies and tourism organisations on crisis management, communication and promotion.”

– Paris Mayor, Anne Hidalgo



Love Sri Lanka Resilience Action Plan

6
projects

17
actions

Project criteria

Alliance-led projects have been created based on the following criteria:

1. Reflect the Tourism 2025 Vision and 2020 Tourism Strategic Plan
2. Are targeted at driving sustainable international visitor growth
3. Deliver benefits and impact countrywide
4. Everyone is welcome to engage and get involved in Alliance projects
5. Focused on fewer, higher impact actions
6. Can be delivered within the next 12-18 months
7. Support not duplicate government initiatives
8. Measurable.

project

1

LOVE SRI LANKA ONE VOICE

The Alliance is focused on increasing timely, relevant and consistent messaging to the industry to aid greater collaboration and performance.

1. Industry Communication Channels

- The Alliance will create a new Sri Lanka Tourism Alliance tri-lingual (English, Sinhalese and Tamil) website for industry communication srilankatourismalliance.com.
- Creation of a new Love Sri Lanka Tourism Alliance tri-lingual monthly industry newsletter.
- The Alliance will conduct face-to-face industry engagement with regions and in Colombo.
- Regular Alliance industry newsletter to international tourism trade.

2. Sri Lanka Tourism Alliance Crisis Response Plan

- Based on the learnings from the Easter Sunday attacks, a private sector-led crisis response team and plan has been created with the assistance of USAID YouLead. This plan and team will lead Alliance communication in the event of any future crisis.
- The Alliance will also share crisis management templates and practical tips for operators to manage their businesses during a crisis.



LOVE SRI LANKA RESEARCH

A key priority for the Alliance is the provision of better insights, data and analytics for industry-wide planning, decision making and performance tracking.

3. Industry benchmark study

- The Alliance will produce the first national tourism private sector-led online benchmark survey to commence in October, with results shared at the end of December 2019.

4. Aggregated industry performance data

- The Alliance will champion Sri Lanka's first industry performance survey to assist Alliance members with better business decision making.
- The online monthly survey will collect private sector performance metrics including visitor numbers, length of stay and average spend.
- All data will be anonymous and collated by a leading independent research firm and shared back as aggregated tourism data to Alliance members each month.

5. Online tourism research library

- Within the Alliance's new industry website, a free research library will be accessible for members, with links to relevant global tourism research studies and insights. Focus areas will include industry performance, consumer travel trends, sustainability and digital marketing.

6. Wellness tourism research

- The Alliance is proud to be partnering with the not-for-profit Global Wellness Institute's Wellness Tourism Initiative consumer study. The insights will also support the country's National Export Strategy on Wellness.

7. Love Sri Lanka 2030 tourism white paper

- The Alliance, in consultation with the industry, will champion the creation of a Tourism 2030 white paper. The paper will discuss the key priorities relevant to all operators, for the next decade in tourism.

LOVE SRI LANKA SIGNATURE EXPERIENCES



To support the effective marketing of Sri Lanka globally, the Sri Lanka Tourism Alliance will focus on two key pillars - content creation and partnerships.

8. Love Sri Lanka content creation

- The Sri Lanka Tourism Alliance will deliver the first ever private sector-led national signature experiences content strategy aimed at providing inspiring messages to support Sri Lanka's 2025 vision.
- The core focus will be working with regions and private sector to collate the top 10 experiences against criteria that reflect the Sri Lanka 2020 strategic plan. The content can be by region eg Love Kandy, Love Colombo, Love Arugam Bay, Love Trincomalee or by experience categories - Love Wellness, Love Wildlife, Love Surfing.
- These content lists will be available to everyone for use including regions in their own marketing, the Sri Lanka Tourism Promotions Bureau, Sri Lanka Tourism Development Authority, Industry Associations, International Tour Operators, media and with consumers directly.

9. Love Sri Lanka marketing partnerships

- The Alliance will target a select number of major global and local partnerships to distribute the new Love Sri Lanka Signature Experiences content.
- The Alliance will utilise each partner's own high impact channels rather than paid advertising, with a focus on digital for maximum global impact.

Love Sri Lanka global brands

- Partnerships being considered include media travel brands, adventure retail brands, social media platforms, global airline and hotel chain partners.

Love Sri Lanka local brands

- Partnerships being considered include Sri Lankan wellness brands and sustainable tea, coffee and spice brands.

Love Sri Lanka influencers

- Partnerships will include one major media influencer in priority international visitor markets. The influencer will have a high reach and brand fit with Sri Lanka and its target visitors.

Love Sri Lanka public relations

- Partnerships will include sharing the content with all Alliance members' existing PR teams and networks.
- Our lovesrilanka.org consumer website will be relaunched to focus entirely on inspiring and relevant content for potential visitors.

LOVE SRI LANKA LEARNING



The Alliance is dedicated to supporting all tourism businesses to build the knowledge and experience required to deliver quality visitor experiences throughout Sri Lanka and succeed in the current tourism environment.

10. Online learning portal

- An online learning portal of existing partner links and resources covering tourism marketing, distribution and operational insights on how to improve performance. This will include relevant global and local best practice case studies and interviews.

11. Industry events training calendar

- A calendar of all industry training events and summits occurring across the country from tourism associations, government, and the private sector.

12. Tourism jobs portal

- A one-stop portal for employees, employers, trainers, youth and parents to access information about careers and opportunities in the Sri Lanka tourism and hospitality industry. The portal will be trilingual.

13. International travel agent training

- The Alliance will lead the creation of e-learning tools for international travel agents about Sri Lanka.

LOVE SRI LANKA SUSTAINABLY

The Alliance will support operators to lift industry sustainability practices and will provide event platforms to foster new product development and business opportunities.

project
5

14. Ten sustainable tourism industry priorities

- The Alliance is excited to co-create and champion ten sustainable tourism priorities.
- The Alliance will build on existing Greening Sri Lanka projects and seek expert advice from existing local and global tourism sustainability champions when creating the list. Once finalised, the Alliance will share best practice case studies and tips in this space.
- The aim is to deliver countrywide simple sustainable changes across daily tourism operations.

15. Love Sri Lanka transformational industry events

- The Alliance in collaboration with key tourism associations and the government, will support the industry's development of authentic sustainable tourism experiences via high impact transformative industry events. Ideas to be investigated and costed further include:
 - » Love Sri Lanka Industry Summit
 - » Love Sri Lanka Wellness Tourism Summit
 - » Love Sri Lanka Experience Development Regional Roadshow
 - » Love Sri Lanka Tourism Exchange
 - » Global Tourism Event Partnerships – Host one of the leading global international tourism conferences such as the Global Ecotourism Network Conference or the Adventure Travel Trade Association World Summit in Sri Lanka.



LOVE SRI LANKA COLLABORATION

To achieve the greatest impact for Sri Lanka's tourism sector, close engagement with all stakeholders continues to be critical.

16. Stakeholder collaboration

- Contribute to the creation of annual government marketing, events and development plans that can be supported by industry.
- Advocate for experiential sustainable development policies and promotion.
- Support the execution of the Sri Lanka brand positioning and So Sri Lanka campaign via the Love Sri Lanka Signature Experiences Content Creation project.

17. International diplomacy

- The Sri Lanka Tourism Alliance will continue its public diplomacy efforts and dialogue with international embassies from key global tourism markets. This will ensure the industry's key messages and latest insights are shared and international confidence in our tourism industry is maintained and elevated.



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What does success look like?

Success so far

The Sri Lanka Tourism Alliance has been in operation for six months and delivered the following results to date:

- 186 Alliance Members and 467 companies signed-up for updates
- Love Sri Lanka was visible in over 80% of searches related to travel safety in Sri Lanka globally. (up until mid-August)
- Love Sri Lanka website has had 24,255 unique visitors since the site went live on the 10th of May
- The number 1 traffic source is from the UK, followed by Sri Lanka, USA, Australia and India.

Success of this Love Sri Lanka Resilience Action Plan

Macro tourism measures

- Overall Sri Lanka Tourism Industry performance increases to better than before the Easter Sunday attack eg average visitor spend and visitor numbers from key markets. (as measured by the Alliance's industry tracking survey).

Alliance specific measures

- Deliver on our promise – Alliance led projects are delivered on time and on budget.
- 75% Sri Lanka Tourism Alliance member and stakeholder satisfaction overall.
- 75% member satisfaction with the delivery of the Sri Lanka Tourism Alliance Resilience Action Plan.
- 75% member satisfaction across the following;
 - » The Alliance has provided consistent messaging and a unified voice for industry
 - » Communication from the Alliance is regular, multi-lingual and valued

- » New Alliance website portal is used as a resource for industry
- » Research insights provided have helped members make better informed decisions
- » Alliance's Love Sri Lanka experiences content creation
- » Alliance's Love Sri Lanka marketing partnerships.

- 75% of members are aware of the Alliance's ten sustainable industry tourism priorities.
- 75% of members are embracing at least two of the sustainable industry tourism priorities within their business in first 12 months.

Love Sri Lanka digital metrics

- 100% increase in total unique visitors.
- 100% increase in social followers and engagement.

Alliance membership - it's free!

Become a member today of the Sri Lanka Tourism Alliance and access opportunities to grow your tourism business in a sustainable way.

The Alliance welcomes individuals or organisations based in Sri Lanka or overseas including;

- Those in the private sector who own or work for a business connected to Sri Lanka tourism
- Those in the public sector working for government, educational institutions, regional or industry associations related to Sri Lanka tourism.

Annual membership to the Sri Lanka Tourism Alliance is free.

Alliance member benefits

As a member of the Sri Lanka Tourism Alliance, you will receive:

1. Monthly Industry Newsletter (Tri-lingual – choice of English, Sinhalese or Tamil)
2. Complimentary business listing on the new Sri Lanka Tourism Alliance industry website srilankatourismalliance.com.
3. If you are a Sri Lanka tourism accommodation provider, visitor experience or relevant consumer travel intermediary;
 - a. One complimentary operator listing on the consumer website lovesrilanka.org
 - b. One complimentary Love Sri Lanka travel offer featured on lovesrilanka.org consumer website. The offer will link directly to the members nominated website and/or alternative call to action. All offers must match set criteria provided by the Alliance that support the countries Tourism 2025 Vision.

4. Free access to monthly aggregated industry performance data and research portal.
5. Opportunity to contribute experiences for the Love Sri Lanka Experiences content strategy which will be shared to partners and consumers worldwide.
6. Free access to the Love Sri Lanka online learning portal and industry events training calendar.
7. Free access to the Love Sri Lanka sustainable tourism industry priorities and tips for implementation.
8. Opportunity to attend Love Sri Lanka industry events.
9. Ability to contribute to the countries long-term tourism priorities as part of the 2030 Love Sri Lanka White Paper.
10. Have a voice with government as part of our ongoing dialogue with the Sri Lanka Tourism Promotions Bureau and Sri Lanka Development Authority.

Alliance member obligations

The only commitment required for membership, is participation in the Alliance's annual industry benchmark survey and ongoing monthly industry survey.

Implemented by a leading third-party research provider, results will be anonymous, aggregated and shared back to all members. We understand your time is precious, so the survey will take just 15 minutes to complete each month. That's only 3 hours of your time across a whole year in exchange for the above valuable member benefits.

Ready to join?

lovesrilanka.org/join-the-alliance

ACKNOWLEDGEMENTS



The Sri Lanka Tourism Alliance would like to thank the Australian Department of Foreign Affairs and Trade and their Market Development Facility (MDF) for their ongoing and invaluable support to the Sri Lanka Tourism Industry, and specifically, for their support in the creation of this Love Sri Lanka Resilience Action Plan.

Other key partners who have been critical in supporting the establishment of the Sri Lanka Tourism Alliance include:

- **USAID YouLead**
- **USAID SAIL**
- **Wunderman Thompson**
- **Antyra Digital Solutions**

Thank you also to the Sri Lanka Association of Inbound Tour Operators (SLAITO), The Hotels Association of Sri Lanka (THASL), The Association of Small and Medium Enterprises in Tourism Sri Lanka (ASMET) for their support of the Sri Lanka Tourism Alliance and input into this Resilience Action Plan.

Our sincere thanks to Matthew Williams-Ellis, an award-winning London-based travel, documentary and landscape photographer, who generously provided the use of his Sri Lanka travel images on page 6, 8 and 24 for this document. matthewwilliams-ellis.com

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