Sri Lanka Tourism
Strategic Plan
2017-2020
SUMMARY

Tourism in Sri Lanka: A Story of Untapped Potential

A transformation of the tourism industry is required to make Sri Lanka competitive in the global travel market place. This is the context and rationale for this Tourism Strategic Plan (TSP), which recommends actions and implementation mechanisms for the next four years, with a long-term view toward Tourism Vision 2025 and achieving the United Nations (UN) Sustainable Development Goals.

Tourism in Sri Lanka has been a story of untapped potential. The country is missing opportunities to increase investment and jobs and to use tourism revenues to conserve the environment and sustainably support communities in all parts of the island.

Growth in the sector — visitor numbers, investment projects and international interest — has taken place predominantly organically, without a definite vision and without coordinated planning. Visionary and strategic guidance for brand positioning as well as plans and policies for value addition have not been consistently executed.

Fundamentally, the ambitions of this TSP are to increase revenue for the country, support local communities, and increase tourism on a sustainable platform.

To achieve these ambitions, a variety of stakeholders must be involved to ensure that:

- Visitors have more opportunities to spend on extraordinary experiences, with more value added sites to visit and stay longer.
- Communities are active participants in delivering the memorable experiences.
- Investors have access to hassle-free opportunities and partnership prospects.
- A skilled, service-oriented workforce is better equipped to engage in higher-value tourism services.
- Government is well coordinated and consistent, prioritising sustainability and using reliable data to make decisions.

The industry is poised to offer great growth and investment potential. The underlying goal of all efforts is to improve visitor experiences so that they are world class and sustainable while still being firmly rooted in the inherent natural, cultural, historic and social capital of Sri Lanka and its people.

By 2025, it is hoped that Sri Lanka will be identified as a place for memorable, authentic, and diverse tourism experiences.

High-level objectives aligned with national strategies were defined.

Higher-skill & more jobs, more female employment	More opportunities for foreign direct investment & domestic investment	Greater inclusivity & sustainability

A clear strategic direction underpinned these: **TOURISM VISION 2025**

Philosophy, vision, mission, objectives,
UN SDGs & guiding principles

This was followed by analysis of products, markets, institutions, partnerships and policies.

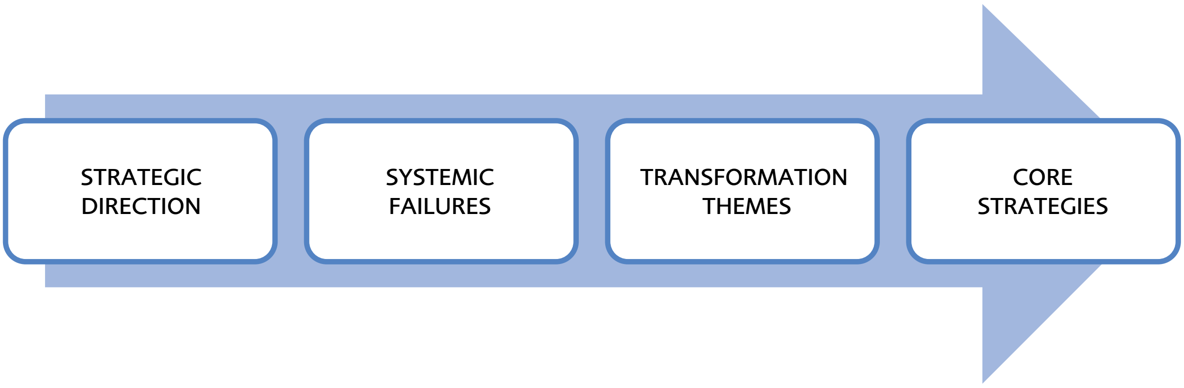
Analysis leading to 4-year
TOURISM STRATEGIC PLAN (TSP)

The analysis highlighted areas of **systemic failure** that undermine achievement of Tourism Vision 2025.

Market Failures	Institutional Failures	Resource Failures	Coordination Failures

Six transformational themes are defined in the TSP to help **achieve objectives**
and address the **systemic failures identified.**

Improve institutional performance, governance & regulations	Improve market understanding & visitor segmentation	Improve communication across marketing channel
Lift industry standards at all touch points	Develop & plan destinations; identify transformative project opportunities & signature tourism experiences (product definition & diversification)	Improve workforce & stakeholder engagement



ROOTS PHILOSOPHY

- Celebrate Sri Lanka
- Tourism is rooted in the people, places, heritage, and values of the country
- Tourism can promote a sense of place and belonging and a voice for every community
- Tourism should be used as an income generator to protect, conserve and enhance Sri Lanka's natural environment as well as the tangible and intangible cultural and historic assets
- This Roots Philosophy should govern policy, planning and development to build economic, social, environmental and local capital
- Visitors, both domestic and international, are guests in the country

VISION

To be recognised as the world's finest island
for memorable, authentic, and diverse experiences

[MADE in Sri Lanka]

MISSION

To be a high-value destination offering extraordinary experiences
that reflect Sri Lanka's natural and cultural heritage,
are socially inclusive and environmentally responsible,
and provide economic benefits to communities and the country.

HIGH LEVEL OBJECTIVES FOR 2020

- **TOURISM TO BE SRI LANKA'S #3 NET FOREIGN EXCHANGE EARNER, WITH A TARGET OF US$7 BILLION EARNED IN 2020.**
  In 2015, tourism was the #3 foreign exchange earner, at US$2.98 billion.

- **TOURISM AND ITS SUPPORTING INDUSTRIES TO EMPLOY 600,000 SRI LANKANS, WITH WOMEN ACCOUNTING FOR 10% OF THE WORKFORCE.**
  In 2015, 319,436 people were employed in the tourism sector. Female employment has not been calculated in official statistics.

- **TO INCREASE DAILY SPENDING PER VISITOR TO US$210.**
  In 2015, the daily spend was US$164.

UN SUSTAINABILITY DEVELOPMENT GOALS & TARGETS

- **SDG8: Promote sustained, inclusive, and sustainable economic growth; full and productive employment; and decent work for all**
  By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products

- **SDG12: Sustainable consumption and production patterns**
  Develop and implement tools to monitor the effect of sustainable development on sustainable tourism, which creates jobs and promotes local culture and products

- **SDG14: Conserve and use the oceans, seas, and marine resources for sustainable development**
  By 2030, increase the economic benefits of small island destinations and low-income countries from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture, and tourism

GUIDING PRINCIPLES

1. **CAPTURING THE BENEFITS OF TOURISM FOR SRI LANKA**
   The tourism industry makes a significant contribution to the growth and diversification of Sri Lanka's economy. It should be considered a key pillar of the economy and a priority in government decision-making. Facilitated by the public sector, the private sector should play a lead in the development of the tourism industry.

2. **DEMOCRATISATION OF ECONOMIC PARTICIPATION**
   Tourism should result in optimal economic benefit to Sri Lanka's economy by maximising net foreign exchange income, spreading development throughout the island, and creating gainful employment for Sri Lankans. Tourism growth should stimulate and deepen the value chain and ensure viable, long-term economic operations, providing socioeconomic benefits that are fairly distributed to all stakeholders.

3. **CONSERVATION AND WORLD-CLASS MANAGEMENT OF ASSETS**
   Tourism development should promote the conservation and enhancement of Sri Lanka's natural environment and its historical, social and cultural heritage, avoiding harmful effects. It should make optimal use of environmental resources — maintaining essential ecological processes and helping to conserve natural biodiversity.

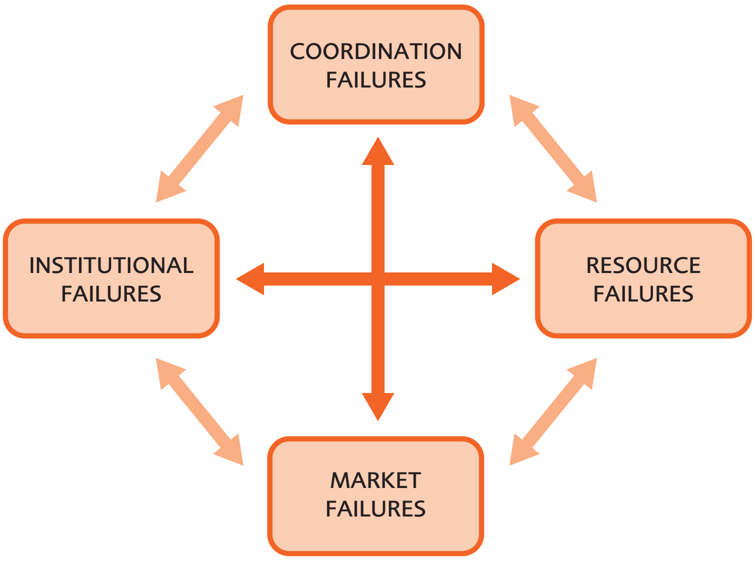
4. **LOCAL COMMUNITY INVOLVEMENT**
   Tourism should respect the sociocultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to intercultural understanding and tolerance. Tourism development should involve local communities in a real, holistic capacity. Strong political leadership, including regional and local government, should foster informed, wide participation of all relevant stakeholders and support consensus building.

5. **MEMORABLE EXPERIENCES ROOTED IN HERITAGE**
   All tourism services and activities should be visitor-centric and rooted in the environmental, religious, social and cultural heritage of Sri Lanka. They should provide a high level of visitor satisfaction and ensure a meaningful visitor experience, providing learning opportunities and raising awareness about best tourism practices.

6. **RESPONSIBLE DESTINATION MARKETING**
   Sri Lanka should be marketed responsibly to highlight the country's distinctive environment, traditions and attractions. Efforts should also be made to dispel longstanding misconceptions about the country and the tourism sector.

7. **SAFETY AND SECURITY FOR ALL**
   A safe and secure environment should be ensured for all visitors, investors and communities, as well as animals.

Systemic Failures



COORDINATION FAILURES

- **Poor coordination and communication between government ministries, institutions and stakeholders with respect to tourism planning, tourism asset management and tourism destination management.** The distribution of tourism-related responsibilities across multiple agencies and government levels complicates this. Similarly, there is poor communication and coordination with other tourism stakeholders (e.g., with respect to conservation, education, small and medium enterprises (SMEs)), which contributes to conflict in land use[13], and complicates and slows administrative and decision-making processes.

INSTITUTIONAL FAILURES

- **Deficient and politicised leadership and management at all levels of government.** There is a greater emphasis on institution and infrastructure building than on core functions. Political interference has hindered overall output of government agencies and progress on key growth initiatives.

- **Limited awareness and participation in tourism by host communities.** This has caused conflicts between local communities, institutions and investors and has negatively affected local perceptions of tourism-related FDI projects.

- **Inadequate attention to cultural heritage conservation and natural habitat preservation.** Initiatives to monitor over-visitation and promote animal welfare and natural habitat regeneration are not prioritised. There has been a reliance on regulation to manage quality, safety and standards, but limited enforcement of the regulations. In addition, rent-seeking practices subvert the regulatory process.

RESOURCE FAILURES

- **Limited emphasis in the public and private sectors on human capital development and on an inclusive employment agenda across the tourism and hospitality value chains.** In addition to the shortage of skilled staff at all levels and professions, this has led to a failure to identify and foster talent. Women are highly under-represented in the sector, particularly in comparison with other regional destinations.

- **Lack of comprehensive visitor research and data, ongoing research into products and markets, and market intelligence.** Research into alternative attractions and niche and emerging market segments is limited, which limits the effectiveness of product development decisions and marketing strategies, as well as the ability to address seasonality and to make the most of regional attributes.

- **Lack of access to investment and financing, especially for SMEs and women, and high capital costs.** For example, high land prices in certain areas hinder independent small businesses. Construction costs are high as a result of the high cost of inputs (e.g., steel, cement, aluminium, tile), and in some cases, there is over-engineering of resorts, which adds to costs.

MARKET FAILURES

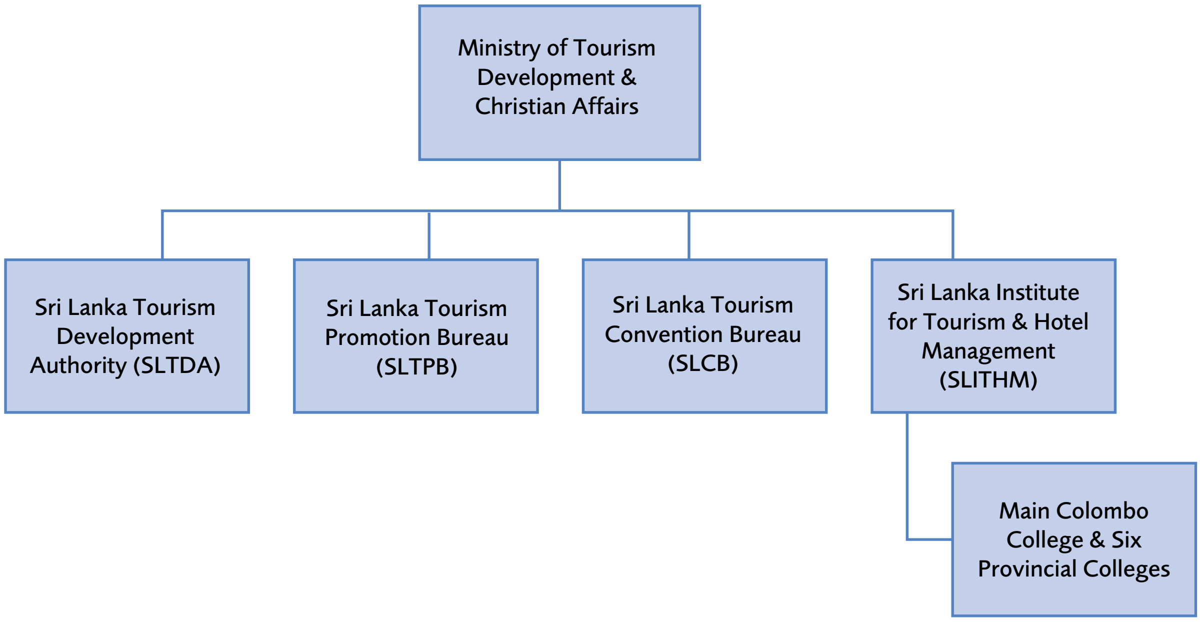
- **Limited attention paid to product diversification and destination development.** This restricts competitiveness, recreation and tourism choices, development of niche markets, and the ability to add value to the visitor experience. The emphasis has been predominantly on site-specific copycat construction, without a holistic approach, which has affected the authenticity and uniqueness of the Sri Lankan product. More importantly, it has led to geographic disparity, with significant tourism growth in only a few areas.

- **Lack of effective mechanisms to manage, standardise and enforce best practices.** This has contributed to poor interpretation, poor visitor experiences, and poor conservation of environmental and cultural values. Specifically, tour operators visit only the sites and outlets where they receive benefits, and middlemen control the delivery of experiences.

- **Market distortions** because of government policies, rent-seeking and subsidised government operations (e.g., tariff rates, Colombo room rates, domestic aviation). Also, several government agencies with limited tourism core skills and functions are responsible for government-owned tourism products and services (e.g., hotel accommodations, tours).

Improving Governance and Regulation

FIGURE 1: Current public sector institutional framework for tourism



Extensive regulatory and structural reforms are needed to:

> Revitalise national-level tourism institutions

> Enable institutions to meet core responsibilities more effectively and efficiently

> Establish a more whole-government consultative, cooperative, coordinated framework for tourism at the central level and with provincial and local governments

> Strengthen consultation and cooperation with the private sector

> Enable business and investment, especially SMEs

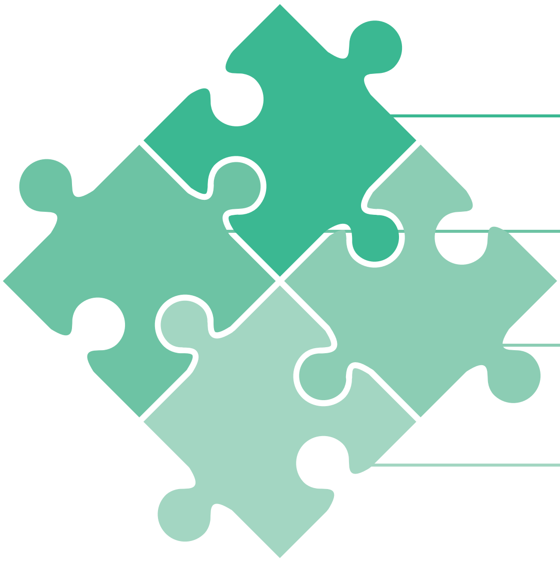
STRENGTHS

- Strong funding and empowerment of national tourism institutions in some areas (e.g., marketing)
- Strong private sector entrepreneurship and institutional framework
- Large public land holding and extensive protected natural and cultural heritage areas

CHALLENGES

- Multiplicity of government agencies with sole or shared responsibilities for important aspects of tourism
- Further fragmentation between national, provincial and local levels of government
- Silo approach within tourism institutions, leading to inefficiency and duplication
- Inadequate planning, development, regulation, marketing and HR training in the public sector
- Lack of consultation, cooperation and coordination within and between all levels of government and with the private sector
- Impediments to business and investment
- Many unregulated tourism businesses that can contribute to risks to safety and reputation

Core Strategies



IMPROVE GOVERNANCE & REGULATION: CORE STRATEGIES 2017-2020

1. REVITALISE KEY INSTITUTIONS
2. IMPROVE RELATIONSHIPS, COMMUNICATION AND COORDINATION
3. REFORM CORE LEGISLATION AND REGULATIONS
4. ENABLE BUSINESS AND INVESTMENT

Understanding Visitors

Core Strategies

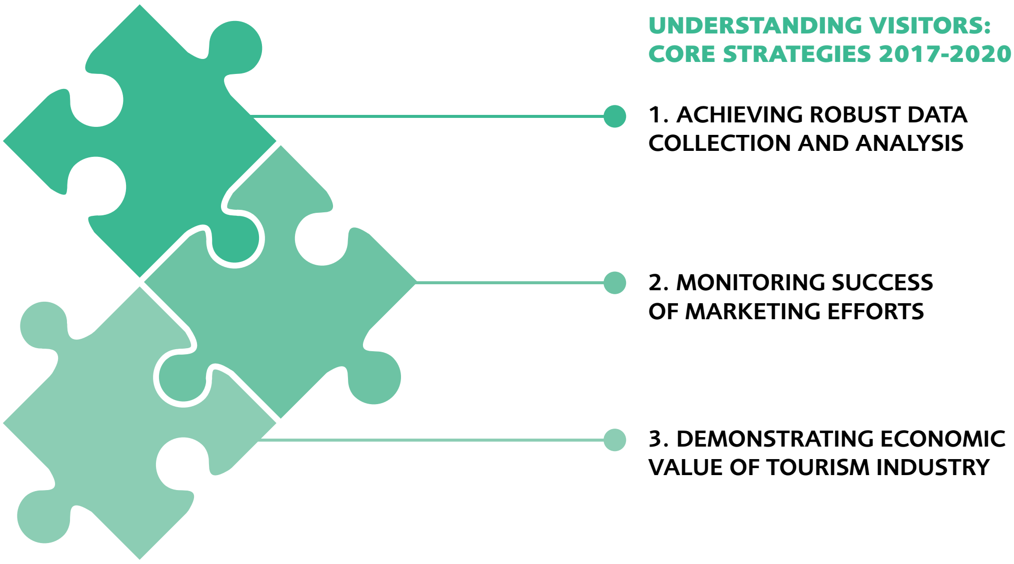


FIGURE 2: Visitor Segmentation Model

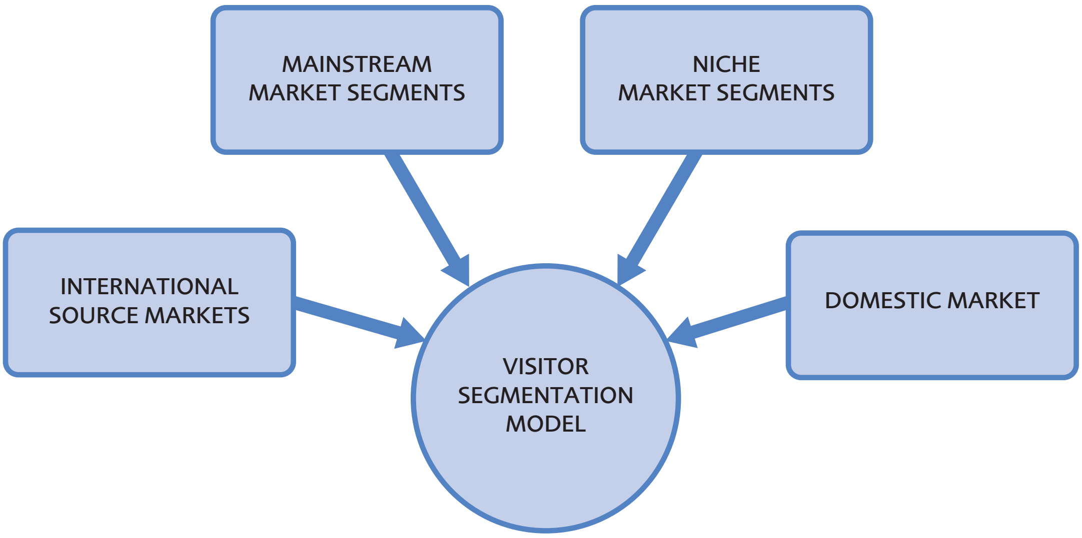


TABLE: Priority and Seasonal Travellers from the Interim Visitor Segmentation Analysis

Category	Markets[1,4]	Attributes and Considerations
Priority	**United Kingdom, China, Germany, France, United States, India[2], Russia[3], Canada, Middle East, Australia**	• Double-digit annual growth from 2012–2015 except Australia and Canada • Traditionally large markets accounting for more than 2% of total arrivals to Sri Lanka - Longer-than-average stay except China and India - United Kingdom and United States are influencer markets - To consider: Effect of Brexit in United Kingdom; oil price slump in Saudi Arabia; economic hardship in Russia; aftermath of U.S. presidential election
Seasonal	**India, Malaysia, South Korea**	• Sizeable source markets • Seasonal patterns could help better use tourism assets (India peaks in May, October, December; Malaysia in June, December; South Korea in January, May, October)

Notes: Less emphasis was placed on spending because of lack of reliable data. This list should be revisited annually to review global and source-specific trends. Although India is identified as a priority market, the relative value addition of this market should be further examined. An alternative ranking system generated through the segmentation model revealed that, because of low spending and short average stay, India's significance in the overall ranking is low, although lack of spending data could have had a distorting effect on this finding. The Indian market could be important in managing tourism assets efficiently during low seasons. Indian states and travellers could be better targeted with more comprehensive, better-quality data.

Russia was included in the priority segment based on historical data despite year-to-date double-digit contraction in 2016. This reflects the expectation of economic recovery in Russia in 2017 and beyond (International Monetary Fund World Economic Outlook, October 2016 Edition).

MAINSTREAM EXPERIENCE SEGMENTS

> Sun and beach

> Historical and cultural sites

> Wildlife viewing

NICHE EXPERIENCE SEGMENTS

> Health and wellbeing

> Pilgrimages

> Bird watching

> Surfing and kite surfing

> SCUBA diving

> Cuisine

> Meetings, incentives, conventions, exhibitions (MICE)

> Weddings

> Cruises

Marketing and Communicating Effectively

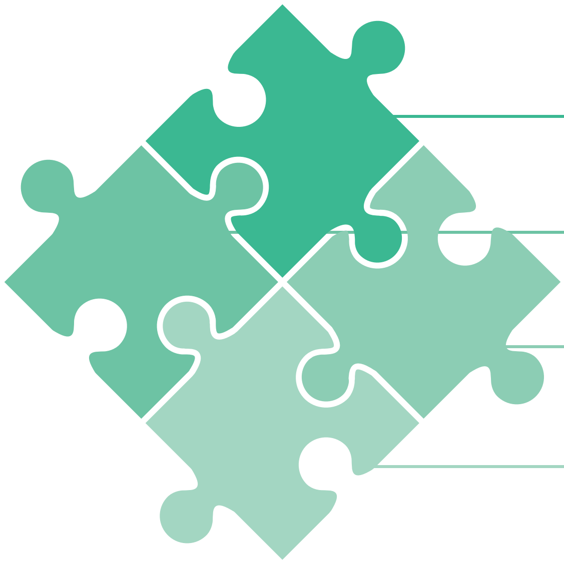
STRENGTHS

- Asia's travel growth is the highest it has ever been, and Sri Lanka is strategically placed in the region alongside growing source markets; it has the ability to attract people already travelling within the region.
- Perceptions of Sri Lanka as a tourism destination are largely positive albeit not widespread.
- Sri Lanka is well positioned to be marketed as an authentic destination for experiential travel, including high-value, nature-based, culturally rich tourism.
- Sri Lanka fills a niche in high-value destinations.

CHALLENGES

- Absence of a holistic approach to marketing and communications from overarching policy to strategic planning.
- Absence of quality-driven, professional, digitally savvy strategic activity plans.
- SLTPB focuses on limited low-return marketing activities, namely conventional methodologies such as trade shows, consumer shows and above-the-line advertising.
- SLTPB marketing and communications activities have not been trend conscious and dynamic in response to market requirements.
- SLTPB is faced with challenges in implementing and executing due to capability, competence and experience limitations of staff.
- Perceptions exist of Sri Lanka as a country that is still at war and therefore unsafe.

Core Strategies



MARKETING AND COMMUNICATING EFFECTIVELY: CORE STRATEGIES 2017-2020

1. SHARPEN THE BRAND FOCUS
2. EMBRACE THE DIGITAL AGE
3. HARNESS THE POWER OF STAGING
4. BUILD STRONGER PARTNERSHIPS

VISION, MISSION, PHILOSOPHY, OBJECTIVES, PRINCIPLES

MARKETING STRATEGY

RESEARCH

Brand health & tracking, data & indicator trends, visitor segmentation & insights, competitor destination trends, brand equity study & key drivers, journey mapping

BRAND DEVELOPMENT

- Define brand, position values, personality, target consumer values, proposition
- Brand comprises brand identity (logo), brand architecture (extension), value proposition (tagline), and brand guidelines covering all touch points
- Resources required: internal team to define brand strategy, external contract or outsourced agency for brand identify development

MARKET DEVELOPMENT

- Formulate development plans and strategy for current markets: mainstream markets, source markets, domestic market
- Formulate development plans and strategy for new markets: niche markets
- Consider sales channel development because of global trends toward greater independent travel and less use of intermediaries
- Use of channels to reach these identified markets (conventional above-the-line and below-the-line, digital, public relations, staging)
- Resources required: internal team to develop product plans, execution, monitoring; cross-functional working groups or teams should come together.

CONVENTIONAL ABOVE-THE-LINE AND BELOW-THE-LINE ADVERTISING

- Brief advertising agency
- Develop advertising campaign, collateral, merchandise
- Resources required: internal team to brief and evaluate advertising agency, contract advertising agency

DIGITAL

- Prepare digital strategy roadmap
- Aspects include web development, social media, content development & management, other web tools
- Resources required: provide brief & contract external company for digital strategy roadmap

PUBLIC RELATIONS

- Prepare public relations an communications plan
- Resources required: internal team for planning, one external global agency or an agency in key markets for execution

STAGING

- Includes events, activations, road shows, trade shows
- Overall plan and events calendar

Developing Sustainable Destinations

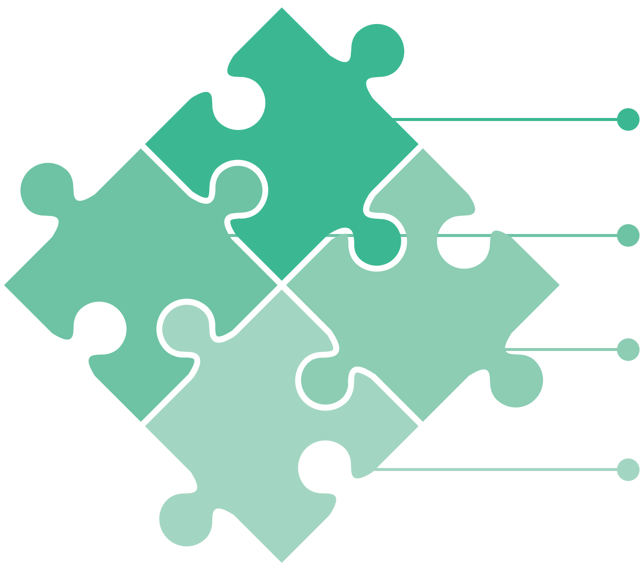
STRENGTHS

- Hundreds of significant cultural sites, national parks, forests and sanctuaries around the country
- Eight UNESCO World Heritage Sites
- Opening up of significant areas that were not easily accessible during the civil war
- Relatively small island with short distances between tourism sites
- 61% of the national road network developed
- Two international airports with planned expansions and upgrades
- Development plans for domestic light aviation network
- Colombo and other strategic port expansions and upgrades
- Good telecommunications and Internet, strong Information and Communication Technology plans for the country
- Accessible high standards for services such as health care and banking

CHALLENGES

- Limited systematic implementation of existing plans and projects
- Protracted and disjointed government decision-making and approval processes
- Inconsistent policy and political interference in infrastructure priorities
- No formal, organised destination management framework linking central, provincial and local governments
- Economic disparity between areas, particularly those inaccessible during the civil war
- Cases of over- and under-development leading to destinations not evolving individual "personalities"
- Long travel time because of road conditions and congestion
- Limited vital connectivity infrastructure such as highways and domestic aviation and leisure infrastructure such as cruise facilities, tourist jetties and marinas
- Lack of established tour routes to north, east, northwest and southeast

Core Strategies



DEVELOPING SUSTAINABLE DESTINATIONS: CORE STRATEGIES 2017-2020

1. IMPLEMENT INTEGRATED DESTINATION PLANNING
2. DIVERSIFY PRODUCT RANGE AND CREATE SIGNATURE EXPERIENCES
3. IMPROVE CONNECTIVITIY TO TOURISM EXPERIENCES
4. FOCUS ON DESTINATION DEVELOPMENT VIA 'TRANSFORMATIVE TOURISM PROJECTS'

MAP: New Tourism Development for Feasibility and Consideration

Note: The map is a visual aid but is not comprehensive. There are many hundreds of additional cultural heritage sites that are not depicted but could be developed to increase the depth of attractions on touring routes.

Transformative Tourism Projects

Ecotourism Discovery Circuit

Coastal Forts of Sri Lanka

Colombo Conventions & Exhibitions Centre and Other Recreation

Marvels of Ancient Wewas

East Coast Sunrise Corridors

Jaffna Islands Exploration

Religious and Spirituality Experience

TABLE: Emerging Tourism Gateway Towns

Location	Significance	Access
Kurunegala	Several notable historical sites, including impressive remains of citadels and palaces built by Sri Lankan kings, Buddhist temples, and monasteries	On route to Kandy, Anuradhapura, Passikudah and BIA Airport
Ratnapura	Gem mining	On route to hill country, Sinharaja Rainforest and Ella and opening to east
Anuradhapura	UNESCO World Heritage Site but currently has only small hotels and homestays	Opening to Jaffna, north and east
Around Digana	Quality golf course and can ease congestion in Kandy	Access to Kurunegala and central highlands, eastern national parks
Around Bandarawela	Tea estates and potential for ecotourism, can ease congestion in Nuwara Eliya during peak season	Connects to Wellawaya
Okanda	Along the south coast, just outside Yala National Park; good surfing	Access to Arugam Bay and east coast
Pottuvil	Coastal town on east coast, close to Arugam Bay	Access to east coast
Mullaitivu	Historical significance and two renowned birding areas nearby—Chundikulam Sanctuary and Kokkilai Bird Sanctuary	Access to northeast coast

TABLE: Possible Use of International and Domestic Airports in Sri Lanka

Airport	Status	Service potential
International		
Katunayake	Existing international airport Domestic terminal to be located at BIA instead of Ratmalana	
Mattala	Existing international airport underused	Access to popular south and east tourism areas and Hambantota commercial area. Possible charter flight hub
Domestic		
Hingurakgoda	Currently Air Force base	Access to Polonnaruwa and Dambulla and to Kandy and national parks in vicinity. Potential to be assessed for international airport.
Trincomalee	Existing Air Force base and domestic airport	Access to east and northeast
Kandy	To be constructed	Direct access to hill country and central highlands
Batticaloa	Air Force base that has operated as domestic airport since July 2016	Access to east and southeast including Arugam Bay
Ampara	Existing Air Force base and domestic airport	Access to east and southeast
Jaffna	Existing Air Force base and domestic airport	Access to north
Anuradhapura	Currently Air Force base	Access to Cultural Triangle and Cultural Heartland Zone
Palavi	Currently Air Force base	Access to west, including Kalpitiya and national parks

TABLE: Current and Potential Locations for Marinas for Consideration

Type	Existing locations	Potential future locations
Mini-marina or jetty	Beruwala, Mirissa	Department of Aquaculture Resources–identified locations Mannar, Kalpitiya
Leisure marina (medium sized)	None	Colombo, Galle, Hambantota, Trincomalee, Batticaloa, Jaffna, Palamunai
Working marina	None	Dikkowita, Oluvil, Kankesanthurai

Lifting Industry Standards

Core Strategies

LIFTING INDUSTRY STANDARDS: CORE STRATEGIES 2017–2020

1. ENHANCE CONSERVATION, PRESENTATION AND MANAGEMENT OF NATURAL AND CULTURAL ASSETS

2. FACILITATE UPTAKE OF BEST PRACTICES AT KEY TOUCH-POINTS

3. IMPROVE VISITOR INFORMATION AND INTERPRETATION

STRENGTHS

- **A wealth of natural, cultural, historical and community lifestyle assets** is well distributed around the island — including eight UNESCO World Heritage sites, five Ramsar wetlands, and many areas of high environmental, cultural and historical value still underused for tourism. Sri Lanka has the second-highest coverage of protected areas in Asia, with the Department of Wildlife Conservation managing nearly 90 natural areas. The Forest Department manages more than 500 areas, many with high levels of biodiversity, endemism, and tourism values similar to those of currently overvisited sites[28]. The Central Cultural Fund, in the Ministry of Education, manages 21 cultural sites, including four World Heritage Sites[29]: Anuradhapura Sacred City, Polonnaruwa Ancient City, Sigiriya Rock Fortress, Kandy Sacred City. There are several noteworthy Buddhist, Hindu, Christian and Muslim religious sites.

- All this provides year-round opportunities for a diverse range of visitor experiences and activities without the need to contrive attractions. As a result, Sri Lanka **possesses significant potential to offer excellent ecotourism and interpretation** around:
  - Large charismatic species
  - Endemic species and high levels of terrestrial and marine biodiversity
  - Agri-tourism — particularly tea and spice production
  - Gemstones and jewellery
  - Religious pilgrimage
  - Historical ports, forts, and engineering feats

- There is a **good revenue base** that the respective organisations collect and directly manage and the **ability to disperse visitor numbers and impacts**. Using other areas with the same-quality values is an advantage for implementing good conservation and visitor management practices.

- The **presence of large international chains** provides opportunities for private sector–led leadership in developing voluntary certification and standards schemes to drive higher standards across the industry. It also provides opportunities for mentoring and training support through information sharing in industry meetings and forums.

CHALLENGES

- **Nature-based, religious and cultural experiences are confined to a few high-profile sites that are congested and poorly managed**. Visitor management plans for sites are deficient, not visitor centric, or not comprehensive. For national parks, visitor use is controlled using only a permit system and available on a park-by-park basis. There is no system for managing commercial operators.

- **There is little information or feedback collected at the site level on visitor numbers, profiles and preferences.** Collecting such information would provide insights into visitor needs and levels of satisfaction; is fundamental for planning and monitoring the effectiveness of infrastructure, interpretation, soft adventure activities, accommodation options, and merchandising; and would provide better understanding of visitors.

- **There is no effective national standard or certification system covering tourism operations for accommodations, tours, events, attractions and speciality services, and retail businesses** (e.g., arts, crafts, Ayurveda, gemstones). This limits Sri Lanka tourism's capacity to:
  - Provide consistent guidance to operators on how to improve their business, environmental and social performance
  - Provide visitors with the ability to identify and indicate a preference for best-practice operators
  - Assist in promoting Sri Lanka as a sustainable tourism destination (by highlighting best-practice operators) to the market segments identified

- **Standards for accommodation, tour and retail providers vary greatly. There is little management, monitoring, or enforcement of best practices, professionalism, or quality**. This is particularly prevalent in protected areas, land-based and marine life tours with respect to health and safety, and in certain specialist services and retail such as Ayurveda and gemstones. There are inconsistent industry standards regarding best practices in waste management, water and energy conservation, habitat preservation, and marine and wildlife interactions, which are all serious reputational risks for a destination.

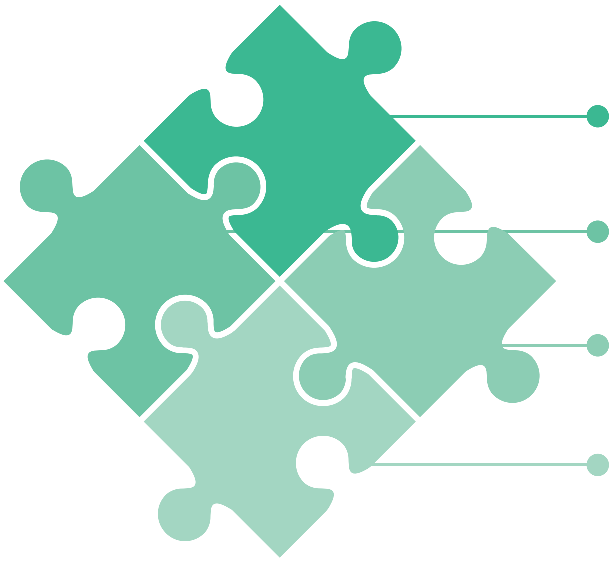
- **There is generally a poor standard of information, narrative, interpretation, and presentation of values at most sites.** Visitor services, signage and infrastructure are absent or substandard, and packaging, presentation and connectivity between sites is poor. Visitor information and information centres are hard to find and inconsistently presented and offer limited services. Visitor information regarding health, safety, and appropriate conduct with respect to wildlife, religion, culture and communities is minimal.

- **Most sites offer one-dimensional experiences and limited opportunities for community interaction.** There are significant opportunities to broaden the range of culturally-based activities to celebrate the country and Sri Lankan life. This would involve the local community in activities (e.g., local crafts, music, traditional livelihoods, authentic Sri Lankan foods) while alleviating negative aspects such as touting. This could encourage voluntourism and local events.

- **The range of touring routes offered is limited and standardised, with tour operators largely using the same overfrequented natural and cultural sites.** In their defence, these have established infrastructure connectivity and visitor facilities. However, tour operators and guides recommend establishments that give them a commission, which disadvantages smaller rural entrepreneurs. Many Sri Lankan operators offer a little of everything in their tourism promotion literature, without perhaps an appreciation that potential niche markets (e.g., bird watching) require more-focused and higher standards of guiding and service delivery. All this limits the diversity of tourism experiences and hinders the regional spread of benefits to communities outside the popular attractions.

Engaging the Workforce and Communities

Core Strategies



ENGAGING THE WORKFORCE & COMMUNITIES: CORE STRATEGIES 2017-2020

1. DEVELOP AN ACTIVELY ENGAGED WORKFORCE
2. PROMOTE EMPLOYMENT AND CAREER OPPORTUNITIES IN TOURISM
3. PRIORITISE LIFELONG TRAINING AND DEVELOPMENT
4. ENGAGE LOCAL COMMUNITIES IN TOURISM

STRENGTHS

- A public sector willing to review existing structures that understands the need for change to ensure that goals and objectives are achieved. There is a desire for a strong learning, development and training framework in the tourism ministry and institutions.

- A resilient private sector, including an upsurge in SMEs, that has withstood trying times during the civil war and is attracting experienced Sri Lankans who have been working overseas. International hospitality brands entering the country are raising the benchmark for industry HR standards.

- Standardised and subsidised training offered at the government-run SLITHM and a national qualifications framework — the National Vocational Qualification (NVQ) system — including national competency standards and competency-based training.

- Friendly, hospitable people and widespread conversational English, which offers an advantage for developing high standards of community engagement and interaction.

CHALLENGES

- A limited understanding among decision-makers and influencers in the public sector of the **importance of HR strategy** in achieving a sustainable workforce.

- A prescriptive, obsolete **scheme of recruitment** in the tourism institutions that does not reflect current best practices for effective service delivery. There is no accountability for achieving outcomes within designated timeframes. Appropriate technology and a work environment conducive to productive work outputs are lacking in the public sector.

- A **lack of formal data and comprehensive research** to capture information on:
  - Employment profiles and practices in the private sector
  - Learning and development programmes in the private sector
  - Number of women employed in the sector and in what capacities
  - Factors attracting or discouraging potential employees to or from the tourism and hospitality sector, especially women
  - Available skill sets of the workforce and trainers
  - Attraction, recruitment and retention strategies for the public and private sectors

- **Limited diversity and inclusiveness** in the private and public sectors, including low female participation in the hospitality workforce.

- **A dearth of qualified trainers**, with little emphasis on soft skills training. The components required to deliver quality training are inadequate, which includes instructors with industry experience, well-equipped facilities for practical demonstration, and significant exposure to on-the-job training. Resource people for training in the north and east are particularly lacking because of language challenges.

- Strong growth in the tourism and hospitality sector places **additional demand** on the labour market, with corresponding shortfalls in supply.

- **Migration** of trained, experienced Sri Lankans to overseas tourism and hospitality jobs that may offer better remuneration and career development prospects.

- Employment in the tourism and hospitality sector is not a **preferred career option** for a variety of reasons, including economic reasons, lack of general awareness of the sector, work hours and environment, and sociocultural pressures.

For more information, please refer to the complete Tourism Strategic Plan 2017-2020, which was led by the Prime Minister's Team on Tourism and Ministry of Tourism Development & Christian Affairs, and with support from the World Bank Group and Australian High Commission.