

# SRI LANKA'S NEW TOURISM PATH



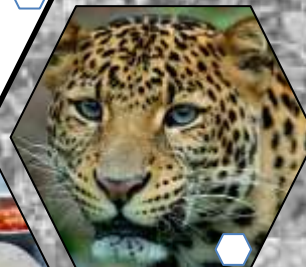




History  
dating to  
**5BC**



**8**  
UNESCO  
SITES



**1,300 Km**  
coastline



Biodiversity  
hotspot



**23**  
National  
Parks



**25,000**  
water  
bodies

World's  
best **spices**



Largest  
land &  
ocean  
mammal



# SRI LANKA TOURISM

- **GROWTH TO DATE**
- **CHALLENGES**
- **NEW STRATEGIC DIRECTION**

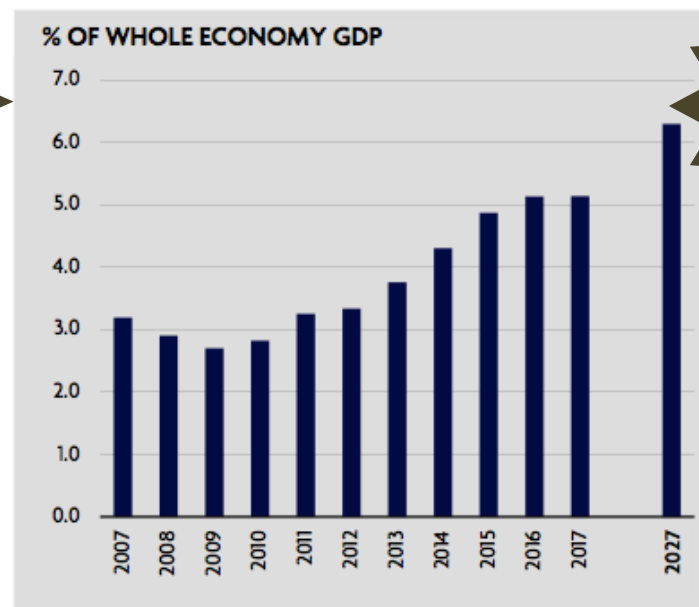
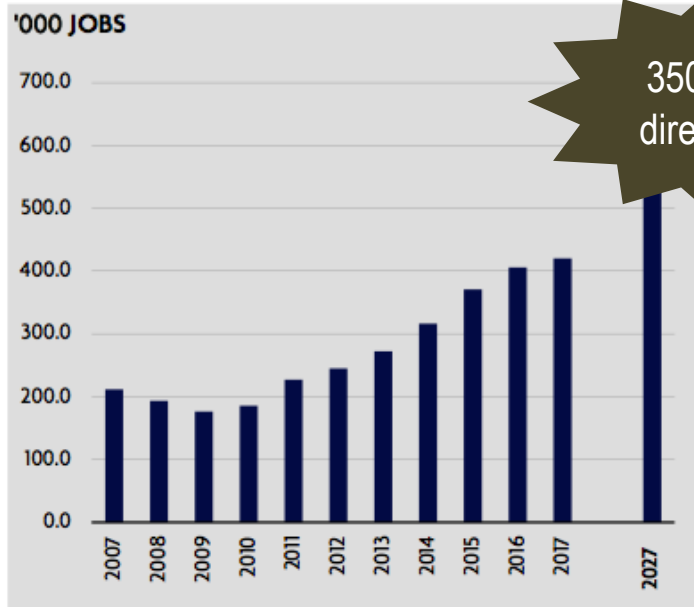






*SRI LANKA TOURISM – GROWTH TO DATE*

# STRONG TOURISM GROWTH





Travellers'  
Choice

# Why is Sri Lanka becoming the most fashionable place to travel?



*Forbes Magazine's top 10 coolest countries to visit (2015)*

*Top destination on Condé Nast Traveler, Rough Guides, Lonely Planet, The Guardian, Vogue, Harper's Bazaar and The New York Times (2016)*

*Bloomberg's top 20 destinations to go in 2017*

*Asia's leading destination and Asia's leading adventure tourism destination, World Travel Awards 2017*

# INTERNATIONAL & HOMETGROWN BRANDS IN SRI LANKA

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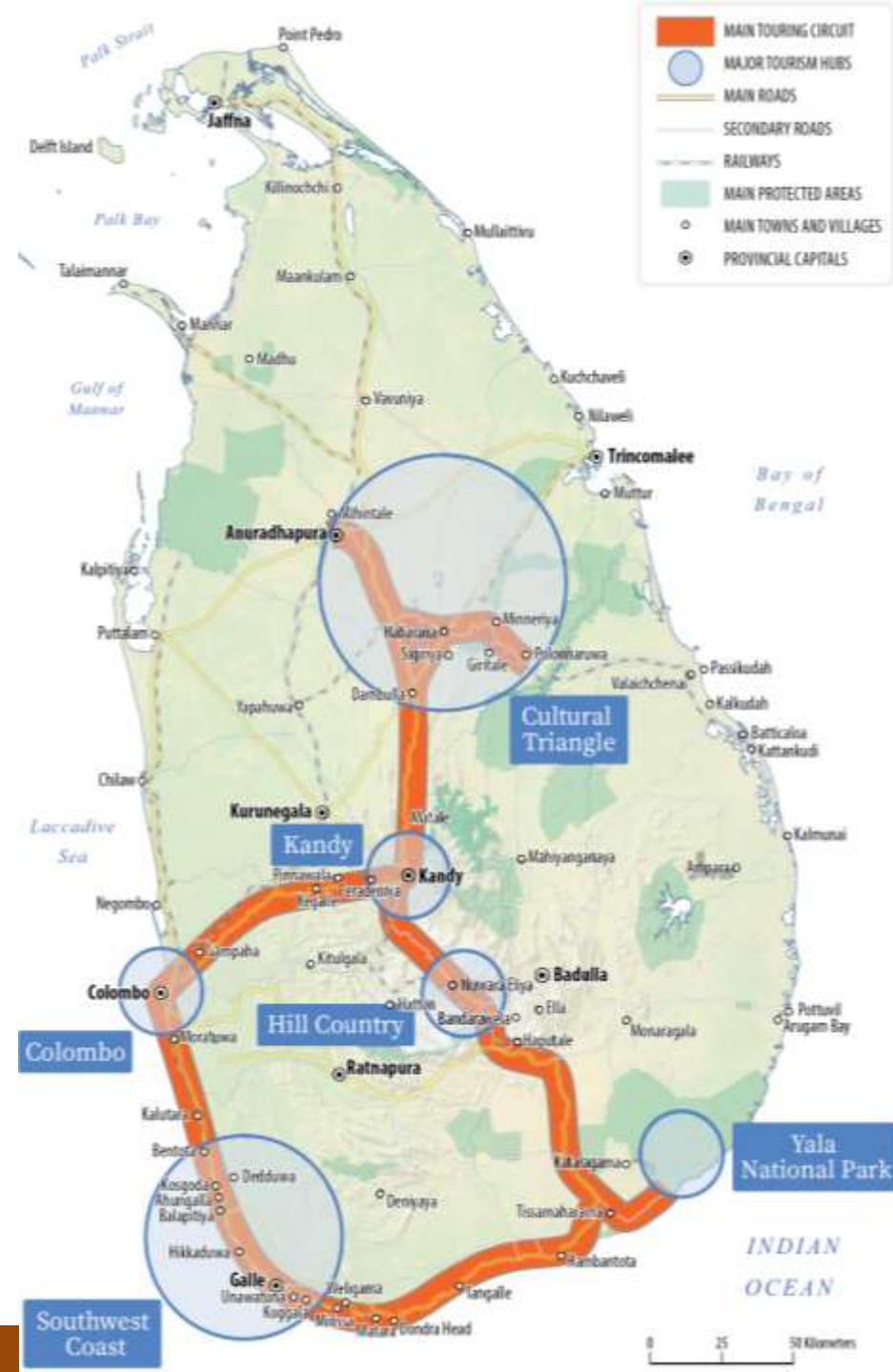


## ***SRI LANKA TOURISM – CHALLENGES***



# CHALLENGES

- SAME TOURING ROUTE FOR DECADES
- LESS REPEAT CLIENTELE
- UNDERVALUING & MISMANAGEMENT OF ASSETS
- LITTLE TO NO VALUE ADDITION & INNOVATION TO CREATE WORLD-CLASS EXPERIENCES
- SEASONAL TRAVEL TRENDS
- BRAIN DRAIN OF BEST TALENT



# CONSTRAINTS

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- **COORDINATION FAILURE** – Between different ministries, institutions & stakeholders for tourism planning, asset & destination management
- **INSTITUTIONAL FAILURE** – Limited host community participation, inadequate attention toward heritage conservation & habitat preservation, limited enforcement of regulations
- **RESOURCE FAILURE** – Limited emphasis on human capital development, lack of comprehensive visitor research & market intelligence, inadequate access to financing & high capital costs
- **MARKET FAILURE** – Inadequate product diversification & destination development, poor interpretation & visitor experiences, market distortions



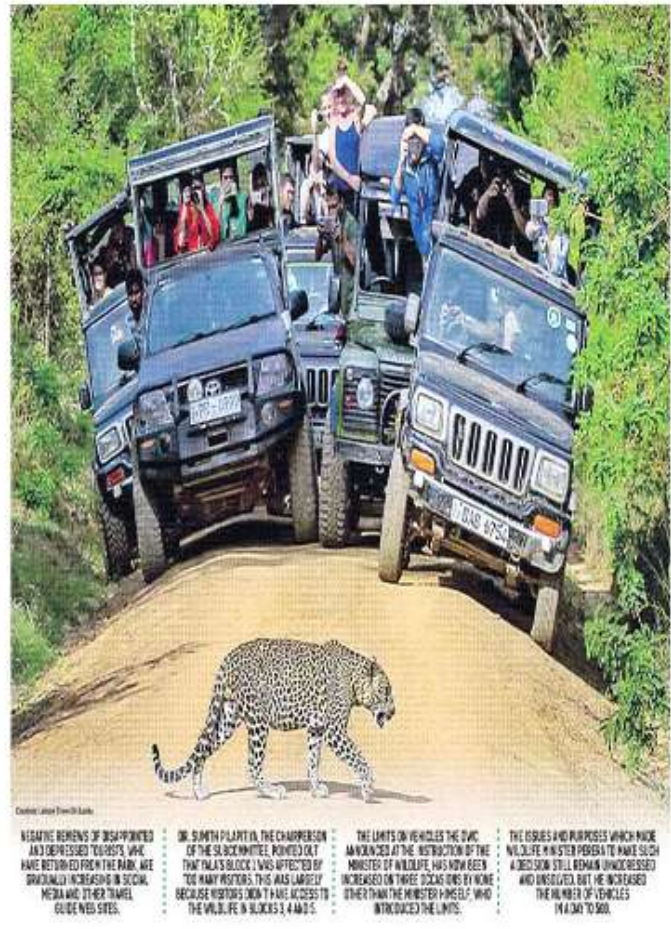


# Selfie leads to Chinese woman's death

Monday, 10 October 2016 09:46 font size - +




MOUNTING  
JEEP  
SAFARIS  
MAKE  
YALA  
ANIMALS  
SNARL



COLOMBO, DEVELOPMENT, PEACE AND CONFLICT, POLITICS AND GOVERNANCE

## Tourism mega-development in Sri Lanka results in human rights violations



Over-  
crowded

Mismanaged

No  
information or  
background

Traffic jams  
inside Yala  
National Park

Dirty

Poor service

Very long  
travel times

Congeste  
d

More like a  
whale &  
dolphin hunt

Rogue guides

Poor  
experience, not  
worth the price

Attractions lack  
basic infrastructure  
& maintenance

No experiences to  
become a high-  
end destination





*SRI LANKA TOURISM – NEW STRATEGIC DIRECTION*







# ROOTS PHILOSOPHY

*Define Sri Lanka's value proposition  
and competitive advantage*



# Sri Lanka Tourism Vision 2025

## VISION

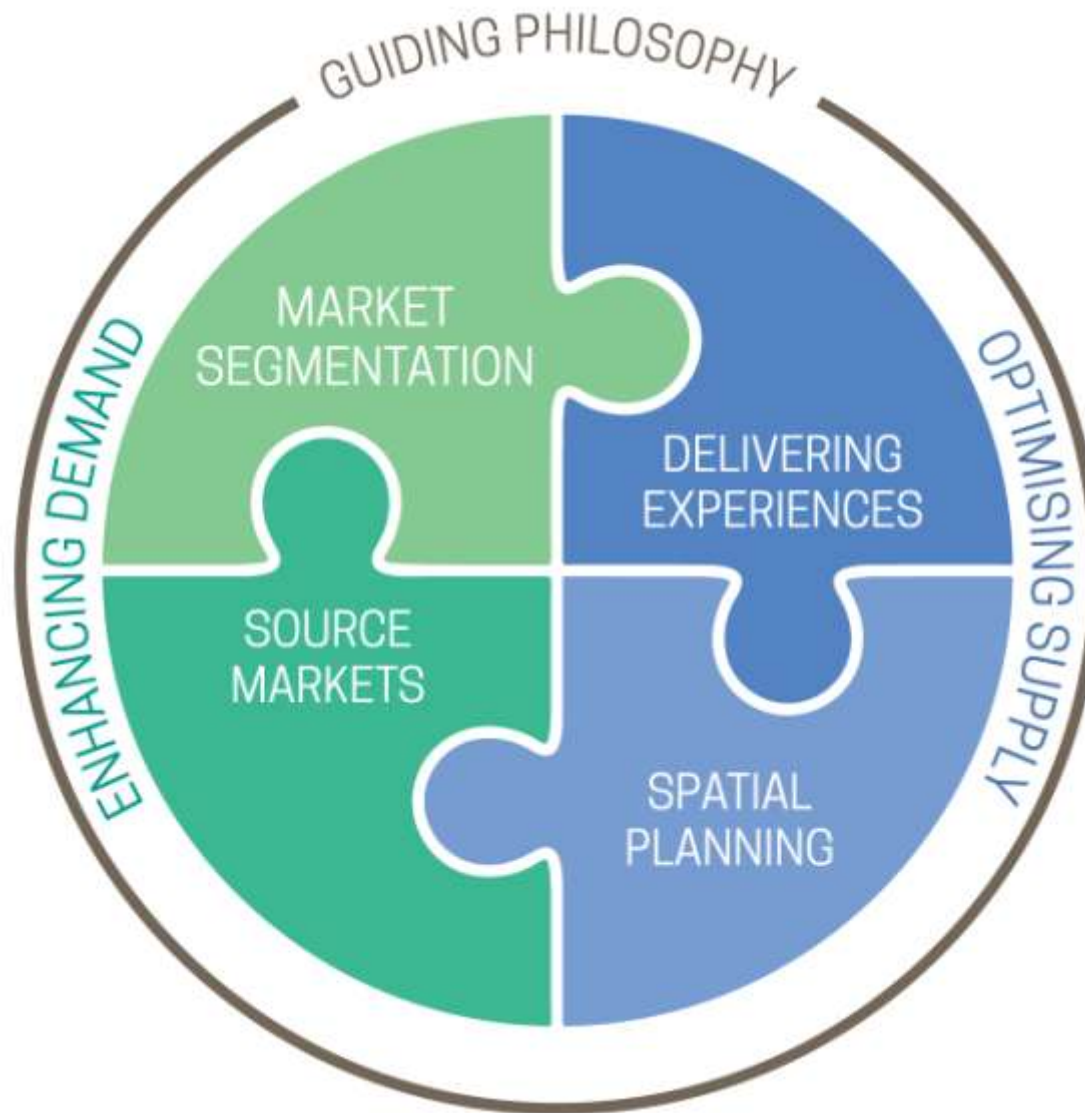
TO BE RECOGNISED AS  
THE WORLD'S FINEST ISLAND FOR  
MEMORABLE, AUTHENTIC AND DIVERSE  
EXPERIENCES  
(MADE IN SRI LANKA)

## MISSION

TO BE A HIGH VALUE DESTINATION  
OFFERING EXTRAORDINARY EXPERIENCES  
THAT REFLECT SRI LANKA'S  
NATURAL AND CULTURAL HERITAGE;  
ARE SOCIALLY INCLUSIVE AND  
DRIVE ECONOMIC BENEFITS TO  
COMMUNITIES AND THE COUNTRY.



# HOLISTIC APPROACH TO PLANNING, DEVELOPMENT & PROMOTION





“Tourism Vision 2025 and Tourism Strategic Plan 2017-2020 were the first steps in changing the sector’s growth trajectory and aligning stakeholders.”

JULY 2016

## **SRI LANKA TOURISM VISION 2025**

- Ministry-led stakeholder consultations
- Individual meetings
- World Bank & Australian consultancy support

DECEMBER 2016

## **SRI LANKA TOURISM STRATEGIC PLAN 2017-2020**

MARCH 2017

**Cabinet approval** for Vision and Strategic Plan

Ministry-led high-profile **stakeholder workshop**

MAY 2017

**TOURISM TASK FORCE** appointed by Hon. Prime Minister

SINCE JULY 2017

**Project management** of 144 actions in Tourism Strategic Plan





# GUIDING PRINCIPLES

- ➔ CAPTURING THE BENEFITS OF TOURISM FOR SRI LANKA
- ➔ DEMOCRATISATION OF ECONOMIC PARTICIPATION
- ➔ CONSERVATION & WORLD-CLASS MANAGEMENT OF ASSETS
- ➔ LOCAL COMMUNITY INVOLVEMENT
- ➔ MEMORABLE EXPERIENCES ROOTED IN HERITAGE
- ➔ RESPONSIBLE DESTINATION MARKETING
- ➔ SAFETY & SECURITY FOR ALL



# TOPLINE OBJECTIVES FOR 2020

## → INCREASE EARNINGS

Target of US\$ 7 billion earned from tourism sector

Sri Lanka's top 3 Forex earner  
Higher daily visitor spend

## → CREATE EMPLOYMENT

Target of 600,000 Sri Lankans employed in hospitality  
10% of workforce to be women





# TOPLINE STRATEGIES FOR 2020

## → DIFFERENTIATION

Value addition & multi-dimensional

## → DIVERSIFICATION

More spending opportunities

## → DISTRIBUTION

Island-wide travel

## → DEDICATION

To natural & cultural heritage conservation

# TSP

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## IMPROVE GOVERNANCE

- ➔ STRENGTHEN & REVITALIZE CENTRAL INSTITUTIONS
- ➔ IMPROVE COORDINATION AT CENTRAL, PROVINCIAL AND PRIVATE SECTOR

## BETTER MARKET INTELLIGENCE

- ➔ TARGET AUDIENCES
- ➔ FORMULATE VISITOR SEGMENTATION MODEL

## HUMAN CAPITAL DEVELOPMENT

- ➔ EMPOWERED WORKFORCE, IMPROVED SKILLS, DIGNITY OF LABOUR





# TSP

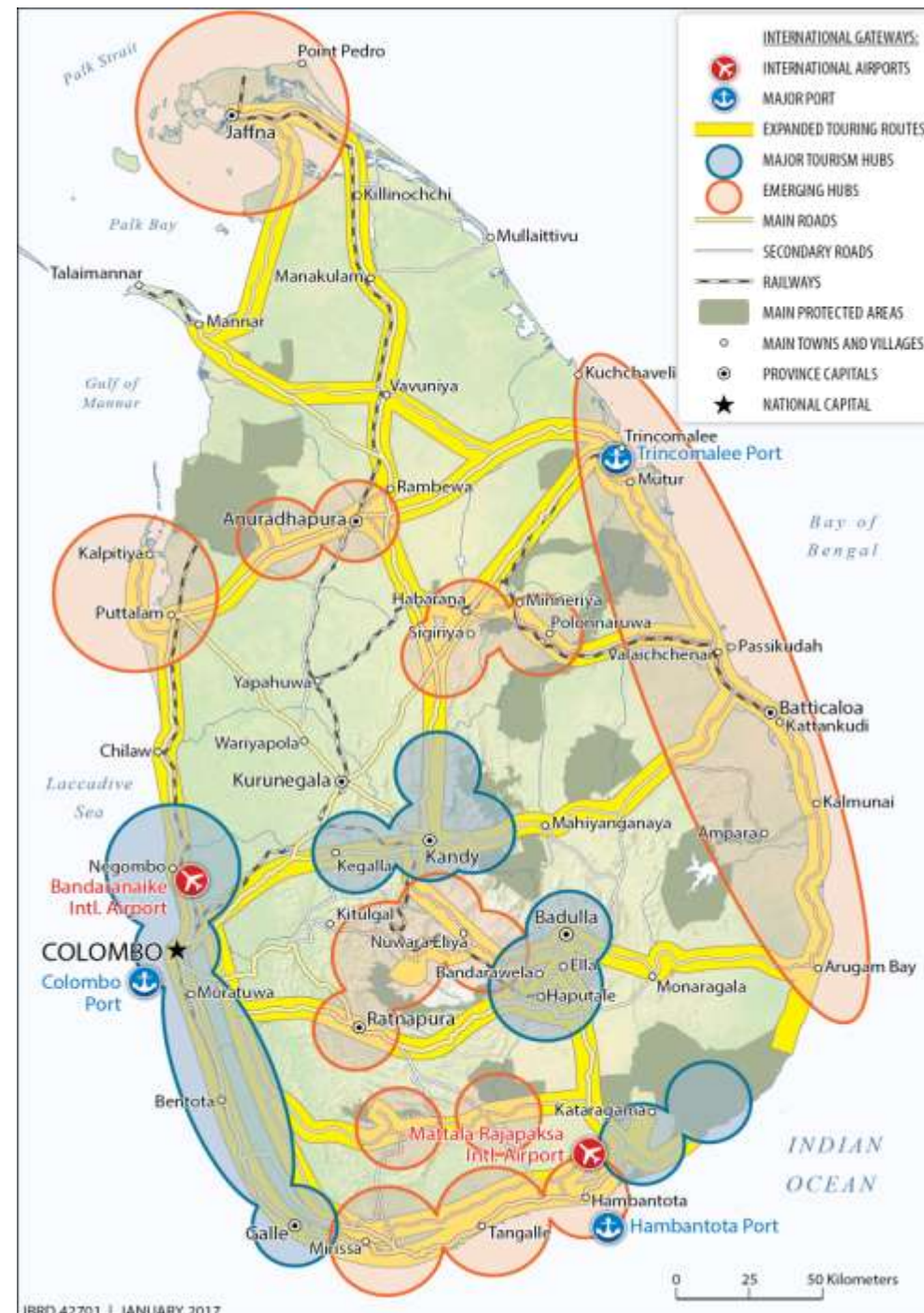
## TARGETED DESTINATION MARKETING

## BETTER MANAGED RESOURCES

- ➔ NATIONAL “HOUSEKEEPING” PROGRAMME
- ➔ IMPROVED VISITOR MANAGEMENT

## DIVERSIFY PRODUCT RANGE & SIGNATURE EXPERIENCES

- ➔ HUBS & NODES CONCEPT
- ➔ CONNECTIVITY
- ➔ OPPORTUNITIES FOR INVESTMENT & COMMUNITY INVOLVEMENT



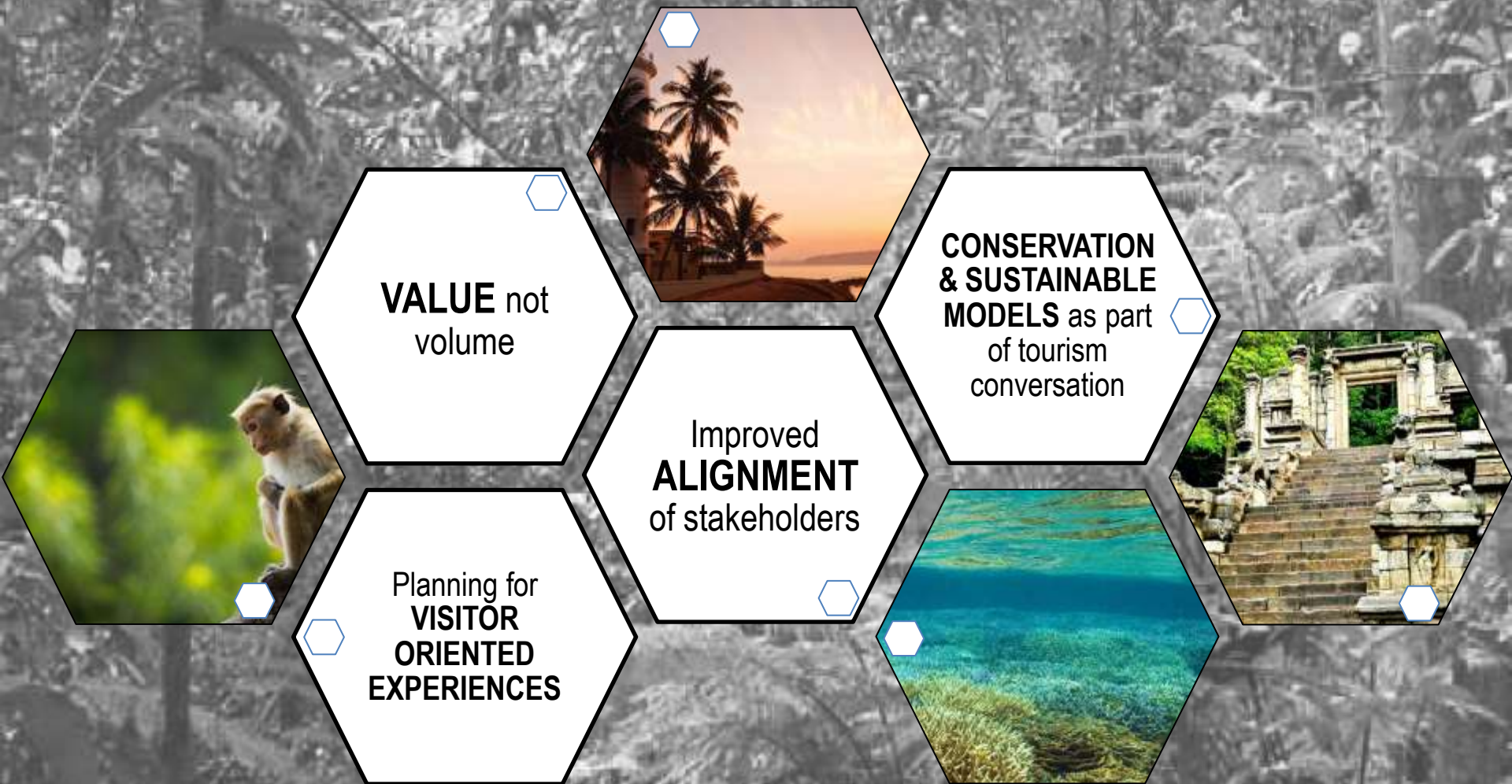


# CATALYTIC PROJECTS

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- **Ecotourism Discovery Circuit**  
First-of-its-kind-in-Asia, eco-certified tourist itinerary, new wilderness & research products
- **Coastal Heritage Forts in Sri Lanka**  
Mini island cruise, anchor attractions, World Heritage listing, Hammenheil Fort as Asian War museum, opportunities for PPPs
- **Colombo Conventions & Exhibitions Centre**  
Also development of recreation & events in Colombo
- **Marvels of Ancient Wewas**  
Showcase ancient engineering, adds to Cultural Triangle itinerary, Rajarata Hydraulics Civilization Museum, birdwatching & nature excursions
- **East Coast Sunrise Corridors**  
Batticaloa Fort, Trincomalee waterside, Passikudah family entertainment, nature tourism around Arugam Bay
- **Jaffna Islands Exploration**  
Accommodation in custom-built vessels, excursions on islands
- **Religious & Spirituality Experience**  
Pilgrimage trails coupled with Ayurveda





2017 Global Eco Asia-Pacific  
Tourism Conference

27<sup>th</sup> – 29<sup>th</sup> November 2017  
Adelaide



*Thank you*

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