



LASTING IMPRESSIONS

The New Face of Tourism in Sri Lanka

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Introduction

Travelling across Sri Lanka

Growing up in a small island country has afforded me the opportunity of being able to visit the minimal expanse of my homeland in relatively little time. From Jaffna in the North to Galle in the South, to Pasikuda in the East and my neighboring city Colombo in the West, I have been privileged to see the beautiful sights of the 'Pearl of the Indian Ocean'. Just as Marco Polo was entranced by the visage while exploring the island during the 13th century, I remain enchanted by Sri Lanka and all it has to offer.

When travelling across Sri Lanka, I travel as a tourist. Thus, it allows a better opportunity to look at all the attractions I visit with a more objective view. This has honed my ability to also notice where our shortcomings lie as a tourist destination. Sri Lanka has much to offer to satisfy tourists. There is a significant balance in both nature and culture, with the abundance of beaches, rainforests and wildlife, alongside the historic cultural and religious heritage sites. However, there is a difference in having the attractions and being attractive. It matters very much that what a country offers to its tourists is maintained properly and ensure that that tourists are satisfied with their experience. My personal experience in which I have visited every major and minor attraction in the country, greatly influenced my decision to do more research on tourism, not only to understand what lies behind making Sri Lanka worth the visit, but identifying what can be done especially during this time when we are experiencing the onset of peace since the conclusion of the internal conflicts in the year 2009. Through this identification we can note where Sri Lanka tourism is lacking and how to make it worthwhile as a major industry and economic sector in the country.

Tourism in Sri Lanka: A history

Sri Lanka has enjoyed a myriad of visitors since early historical times. As recorded on the Sri Lanka Tourism website¹, the first attempt to develop tourism was believed to have been made by the British colonial government via the establishment of the Government Tourism Bureau in the year 1937. Though not meant to facilitate tourism in the modern sense, the intention of setting up the bureau was in order to provide facilities and services to passengers sailing through the port of Colombo. Sri Lanka's location in the Indian Ocean, a central point when crossing from the West to the East, made it a veritable attraction to various passenger ships passing through. Many who disembarked these vessels enjoyed visiting the sights in Colombo, Kandy and the natural surroundings, and the bureau provided necessary services such as tours. Though no accurate records are available, it is believed that approximately one hundred to two hundred thousand passengers visited annually. With the commencement of the Second World War, the bureau ceased operations and tourist activity was limited.

Having gained its independence in the year 1948, the new government of Sri Lanka decided to revive tourism by setting up the second Government Tourist Bureau which functioned under the Ministry of Commerce, and was later brought under the Ministry of Defense. Unlike its predecessor, the new bureau was entrusted with more responsibilities. Not only did it involve meeting and greeting facilities, but the bureau also engaged in promotional work overseas and developed accommodation facilities. A Director was selected to oversee the bureau and various divisions were established to handle the new functions assigned to it.

Sri Lanka soon saw a rapid increase in the influx of tourists. This was largely propelled by the development of jet aircraft civilian transport post-World War II, though Sri Lanka didn't

¹ www.sltda.gov.lk

gain an early advantage from its central location, having only begun improvements on its main airport in Katunayake in the year 1965. The advantage of the head start was gained by Singapore instead.

Furthermore, the development of accommodation facilities was undertaken by the Government Tourist Bureau. The Bureau took advantage of colonial buildings previously built on plantations, or former residences and business facilities and renovated these as hotels. Some of the examples include Galle Face Hotel (Colombo), Mount Lavinia Hotel (south of Colombo), Queens Hotel (Kandy), Suisse Hotel (Kandy) and New Oriental Hotel (Galle). These accommodation facilities were developed in areas of scenic beauty. Other than renovated facilities, no efforts were made to establish new accommodation facilities until 1969, when the Blue Lagoon Hotel in Negombo was established. Despite the fact that international brand name hotels were developing across Asia, there was no attempt to construct hotels of international fame in Sri Lanka.

In 1964 Prime Minister Sirimavo Bandaranaike established the first Hotel School in order to develop skilled manpower in the hotel and catering sector. The private sector was seen playing a role in terms of providing travel agency facilities for visitors, such as meeting on arrival, transfers to hotels, reservation of accommodation, arranging tours, guiding etc. While one of the main functions of the Government Tourist Bureau was to involve itself in promotional activities overseas, local travel agents and some hotels undertook their own promotional activities. If any promotions were carried out abroad, it was done mostly through Sri Lankan embassies and consulates overseas, and through limited participation in travel fairs overseas.

1966 saw the establishment of the Ceylon Tourist Board (CTB), as a government entity focusing on developing tourism in a much more systematic manner. The CTB was allowed

greater flexibility in its functioning, and also sought the establishment of many major accommodation. In October 2007 the Tourism Act No 38 of 2005 came into effect, and provided for the setting up of the Sri Lanka Tourism Development Authority (SLTDA), Sri Lanka Promotions Bureau, Sri Lanka Conventions Bureau and Sri Lanka Institute of Hotel Management, thereby replacing the CTB².

Tourism during conflict

Between 1976 and 1982, tourist arrivals increased by 24% per annum, rising to 407, 230 before dropping to 337, 342 in 1983. The drop in tourist arrivals was largely influenced by the internal conflict that erupted between the Liberation of Tamil Tigers Eelam (LTTE) and the Sri Lankan Army. With the onset of violence in the form of outright war, largely isolated in the North and East of the island, Sri Lanka was soon considered a dangerous destination. Tourist arrival figures fell by 43% to 230, 106 in 1986 in comparison to 1982. The CTB provided a range of concessions in order to help the industry survive the crisis, but the number of tourist arrivals continued to decline. Unless there was a resolution in the ethnic conflict, a recovery was not foreseen, not only in tourism but in various other industries across the country. Initially the conflict was limited to the Northeast, but with targeted attacks in the capital via bomb blasts, the prospect of visiting Sri Lanka became less and less attractive.

However, a ceasefire agreement backed by Norway and signed between then Prime Minister Ranil Wickremasinghe and rebel leader Velupillai Prabhakaran in the year 2002 brought back hope and an immediate boost in tourism. Soon, the number of rooms on the island,

² *SLTDA*: Develop Sri Lanka as a tourist and travel destination both in Sri Lanka and abroad.

Sri Lanka Promotions Bureau: Develop, promote, and market Sri Lanka as a travel destination both in Sri Lanka and abroad. *Sri Lanka Conventions Bureau*: To develop and encourage MICE tourism. *Sri Lanka Institute of Tourism and Hotel Management*: Undertake human resource training and development activities.

totaling approximately 14, 000 in the year 2003, proved insufficient to accommodate the massive inflow. With decreased security at attractions in the Northeast, such as Trincomalee with its beautiful beaches, travelers were encouraged to start travelling to previously inaccessible places again. Even the LTTE were seen as a tourist attraction, as adventurous travelers dared to venture into guerilla zones and satisfy their curiosity. The change was evident in tourism numbers, with 2002 recording 393, 171 arrivals and jumping to 500, 642 in 2003.

However, the devastating tsunami of December 26 2004 temporarily destabilized tourism in the country. With the beautiful coastline of the East and South being heavily damaged, and residential as well as tourist facilities being effectively ruined, tourism experienced a huge loss. As a result of the tsunami, loss of income earnings in the tourism sector was estimated at \$130 million. In terms of rooms 3,500 out of the total 14, 000 rooms in medium and large scale hotels were out of service in late February 2005. About 40 per cent of foreign guest night stays in Sri Lanka are usually enjoyed along the beaches of the island's southern and eastern coasts, which were negatively impacted. Some of the undamaged hotels did experience high occupancy, though it consisted of mainly aid workers etc. It also adversely affected the incomes of multitudes of people who depended on tourism and thus compounded livelihood issues. With the ceasefire agreement still in place during this time, the expectations of tourism growth was temporarily dampened, but eventually bounced back.

The numbers in tourist arrivals continued to increase, until hostilities restarted in 2005 and continued to escalate until major offensives were undertaken in 2006. Finally, the 2002 ceasefire agreement completely collapsed on 2 January 2008. Since then, government control over former LTTE holdings began to spread, and the almost three decade civil war came to its welcome conclusion on 17 May 2009.

The resurgence of Tourism in Sri Lanka post-conflict

With the end of the conflict, tourism in Sri Lanka has flourished. According to official tourism statistics, the number of tourist arrivals grew by 50 percent in the first quarter of 2010 compared to 2009. The SLTDA soon reported a total number of just over one million arrivals in Sri Lanka in the year 2012 alone. Europe, especially Western Europe, continued to dominate tourist arrivals, but there was also a rapid increase of visitors arriving from East Asia. During the first seven months of 2014, tourist arrivals from China jumped 144.2% compared to the same period in 2013. Overall tourist arrivals rose by 25.2% in July 2014 compared to the same month in 2013. The SLTDA had established an ambitious plan, the 'Tourism Development Strategy', in 2011 with many objectives to be achieved by the year 2016. Some of the goals included increasing tourist arrivals to 2.5 million by 2016, increase tourism related employment from 125, 000 to 500, 000 in 2016, increase room capacity to 45, 000 by 2016 and many more. As we are now within 12 months of embarking on the year 2016, it will be interesting to investigate whether these objectives have been achieved, or whether they still can be.

Tourism in Sri Lanka is booming. Or so reports suggest. An analysis on the progress of Sri Lanka's plans as laid out by the SLTDA in 2011 can provide a better understanding on how far has Sri Lanka gone already, and how much further it has left to go. Taking the developments in tourism at face value can be misleading and there is a necessity to look beyond the statistics. Furthermore, putting in place a plan of action to develop tourism just in the view point of the government might not be sufficient, as the objectives of the SLTDA might not necessarily satisfy the expectations of tourists themselves. Looking at what tourists like, what they don't like and what needs to be improved could indicate different paths to take in order to make Sri Lanka an even stronger competitor as a destination in Asia. With famous locations such as the Maldives,

India, and Thailand being quite nearby, Sri Lanka needs a stronger foothold in the global industry. Thus the question at hand is, how much has been achieved in terms of meeting tourism objectives, and what needs to be done in order to further improve tourism in post-conflict Sri Lanka. By answering these questions we can ensure that we meet the expectations of our visitors and be considered a world-renowned destination from the viewpoint of travelers all across the globe.

Literature Review

Tourism in Sri Lanka contributes just over 2% to GDP, and with the conclusion of internal conflicts in the country in May 2009, there has been a significant push to develop tourism. With a strategic plan having been set in place by the Ministry of Economic Development in 2009, measures were taken to increase the infrastructure and arrivals by the year 2016. However, tourism development post-conflict is not proving easy to pursue and there is a necessity to identify whether what Sri Lanka has achieved so far has proven satisfactory for those who indulge in it. Furthermore, it is not only the satisfaction that tourists obtain from their experience in Sri Lanka, but it is also what tourism has done for the country in terms of the effect on the environment that is important to identify.

The following literature review will look at the theories and discussion behind tourism development post-conflict, and ecotourism, especially in terms of developing countries.

In “Innovative solutions for future tourism development in Sri Lanka (2013-2026)” Chandana Jayawardena (2013) rightly identifies that “any country that intends to grow tourism optimistically must develop destination-positioning and brand image in a research based, systematic manner.” According to Jayawardena, Sri Lanka is on the correct path to achieving this

end but there is a problem in communication. He recognizes the need for new thinking and innovative solutions to ensure the future success of tourism in Sri Lanka (526). Over the last couple of decades, international tourists have sought distant, exotic destinations, and by recognizing this opportunity to earn valuable foreign currency, most developing nations have catered to these desires by encouraging international tourism (Werner 141). However, in terms of tourism related research there is a larger focus on the consequences of tourism on localities as opposed to the way tourism affects tourists or the reasons why locals engage in tourism, as identified by Anthony Stronza in “Anthropology of Tourism: Forging New Ground for Ecotourism and other Alternatives” (2001). By looking at the manner in which tourists engage with tourism and locals, there is the potential to identify what measures should be taken to better improve the tourism infrastructure and attractions. In return, tourist interest in a local culture can also bring a greater sense of social solidarity and ethnic pride. Thus researching the opinions of tourists can benefit multiple stakeholders, and yet research in this area is very lacking.

Post-conflict tourism development places emphasis on peace influencing sustainable tourism. Though Kim and Predaux in their article “Using Tourism to Promote Peace on the Korean Peninsula” (2003) expressed skepticism with tourism’s ability to promote peace there is still potential for it to play a positive role. The methodology by which tourism promotes peace post-conflict is identified in stages by Levy and Hawkins (2010) in the article “Peace through Tourism: Commerce Based Principles and Practices.” During initial stages of conflict, tourism destination, tourists and basic infrastructure can often be a target of violence, which results in a disruption of the economies of nations or tourism destinations which rely on tourism. As a country moves into a high conflict period, tourism is virtually non-existent. During the post-conflict period, tourism becomes a way to initiate a low-level diplomacy in order to begin

rebuilding international ties. Soon after, as a destination enters full-fledged reconciliation, tourism can provide a method to explore the healing process, rebuild societies, and reconnect nations or cultures that were separated through conflict (Levy and Hawkins 2010). Businesses can also contribute to strengthening peaceful societies in four ways: fostering economic development, adopting principles of external evaluation, nourishing a sense of community, and utilizing track-two diplomacy suggest Fort and Schipiani in the article “An Action Plan for the Role of Business in Fostering Peace.” Thus, the positive consequences of tourism in a post-conflict arena as it is in Sri Lanka could foster development in multiple avenues, especially in terms of establishing an atmosphere of peace.

According to the Committee on Economic Development (CED), the principle of visitor fulfillment “provides a satisfying and fulfilling experience for visitors, available to all without discrimination, and encourages active interpretation by engaging both visitors and local communities in the learning process” (2008). Tourists can not only provide the means of identifying where tourism itself can improve, but play an integral role in shaping society through their interactions with locals. These groups of tourists that influence society are represented in the article “The New Silk Road: Mediators and Tourism Development in Central Asia” (2003) by Werner. The tourists are considered responsible for bringing either positive or negative changes to local communities, meaning “good” tourists are culturally sensitive, socially responsible, and more likely to bring benefits to local communities, while “bad” tourists are only interested in superficial encounters and do not care about the consequences of their activities. This is a means of pinpointing what markets should be focused on, in order to ensure we welcome those who would be the best influence of social change among the local community, and sustain eco-tourism in the locations they are visiting. Furthermore, the principle of cultural

richness “respects and enhances the historic heritage, authentic culture, traditions and distinctiveness of host communities and local destinations” (CED, 2008). Thus, not only do we cater to a more appropriate market, but we ensure that the market looks to indulge in the rich cultural heritage which Sri Lanka has to offer.

During recent times, countries seek to take advantage of tourism’s economic potential, therefore more attention is being given to developing and implementing sustainable tourism (Levy *et al* 2010). As the United Nation World Tourism Organization (2005) states, “Sustainability principles refer to the environmental, economic, and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability.” There are many experts in academics and industry that propagate anti-tourism sentiments, and there are numerous reasons behind these beliefs, some being that tourism development fails to consider sustainable development goals, thereby being a disruptive force by degrading the natural environment, commercializing culture, reinforcing negative host-guest stereotypes, and creating an economy over-reliant on services and sensitive to seasonal variations, among many other negative impacts. Thus, by pursuing a sustainable tourism approach, tourists can be provided a higher quality experience, an improved quality of life for local residents, justification for environmental protection and enhancement of cultural pride (Levy *et al* 2010). Thus sustainable tourism is a pursuit that could play a significant role in improving tourism as well ensuring environmental protection.

In 2002 an UN-sponsored conference issued ‘The Quebec Declaration on Eco-tourism’, stating that it ‘recognizes’ that ‘eco-tourism embraces the principles of sustainable tourism, concerning the economic, social and environmental impacts of tourism.’ In terms of environmental degradation by means of tourism, growth in the industry has been overly rapid,

unplanned and intrusive and has damaged insular ecosystems. When considering small islands in the Indian Ocean, like the Maldives and Seychelles, tourism along with unplanned urbanization is associated with sand mining, mangrove destruction and coastal pollution (McElroy 2003). Due to tourism's bio-cultural base being in decline across the world, researchers have called for greener, lower density tourism styles and have started to explore the causes of this policy failure in the first place (2003). When visitors start to affect the wildlife, degrade the eco systems, and have to encounter the impacts left behind by other visitors, then the experience is marred and the carrying capacity is reached, suggest Tensie Whelan in the article "Ecotourism and its role in sustainable development" (1991). Proper management of natural resources and working to avoid adverse impacts as a result of the actions of tourists is a vital part of ensuring sustainable tourism.

Environmental conservation has to play a central role in tourism planning, and this role has been steadily growing in importance, as Levy and Hawkins (2010) found out when analyzing what factors influence awards and recognitions for tourism in the international arena. They noted that "the predominance of environmental conservation and protection practices within the cases examined underscore the strategic importance of attractive natural environment for many hospitality and tourism operations" (579). Recognition has been awarded to sustainable practices, but the tourism industry still has much to achieve. Sri Lanka, has a long way to go to develop proper eco-tourism practices, especially in post-war and post-tsunami development.

By looking at the manner in which tourists interact with local communities and the attractions a location has to offer, we note effects it has on cultural identity. Tourism is a tool by which identities can be shaped, and can lead to a kind of "cultural dependency" in which local people gain economic benefits, but only as they are catering to the needs of outsiders (Stronza

2001). In this process, loss of identity occurs in the way that authenticity can become subjective, and tourists often tend to define what they believe is authentic and rely on popular stereotypes as opposed to factual reference points. By looking at what cultural heritage tourists seek by researching their opinion, we can also identify what has been marketed to appeal to tourist opinions and what has been molded to become what it is not, in order to generate further tourism satisfaction. By trying to match the visitors' expectations, tourism can become an empowering vehicle of self-representation and locals may purposely choose to reinvent themselves and modifying how they are perceived by outsiders (2001). These alterations can also occur in the representation of cultural heritage, history, and attractions; when we compare what tourists seek and what a location offers to service that pursuit, we begin to understand what extremes tourism can go to be considered an attractive option. This suggests the question as to whether pursuing tourism satisfaction at the cost of altered heritage is a good idea.

Sri Lanka has much to offer to all those visiting the island nation. The beauty of its nature and the abundance of its cultural heritage has made it an attractive destination. However, this review highlights the necessity to look at tourism satisfaction in order to identify whether the Sri Lanka has taken the measures necessary to improve tourism in the nation. Due to the lack of literature portraying tourists' perspectives on the industry, primary data would better serve to recognize the improvements made thus far. In terms of post-conflict development of tourism in the island nation, the method of using tourism as a propeller of peace needs to be considered. Furthermore, we note that eco-tourism plays a significant role in how tourism is perceived as a viable industry. By ensuring the establishment of sustainable practices, we can further the progress of eco-tourism and conservation of the abundant natural resources Sri Lanka has to offer. Moreover, by looking at the development of tourism and the impacts by tourists in

the nation, we have the means to define which sources of tourists better inculcate “good” social change, and accept the cultural heritage Sri Lanka has to offer, as opposed to seeking an altered form in order to satisfy personal beliefs of authenticity and stereotyped ideas.

Preliminary Analysis

The SLTDA Tourism Development Strategy 2011-2016

According to former Sri Lanka President Mahinda Rakapaksa’s ‘Mahinda Chinthana’ development policy framework, the vision for tourism was to fulfill the infrastructure and other requirements in order to attract 2.5 million tourists annually by the year 2016 (2010, 94). Thus, the Ministry of Economic Development, under whose jurisdiction the SLTDA falls, developed the Tourist Development Strategy of 2011-2016 which identifies several key objectives to be achieved by the year 2016.

The first key objective was to increase tourist arrivals from 650, 000 in 2010, to 2.5 million by 2016. According to the 2013 Annual Statistical Report, Sri Lanka recorded 1.275 million tourist arrivals, and a report of the cumulative of monthly arrivals in 2014 noted an influx of 1.5 million tourists. At present, the monthly arrivals for 2015 from January-March have totaled almost 500, 000 tourists, with evident increases compared to reported values during the same time period in 2014. However, considering the difference of an additional 420, 000 arrivals when comparing 2013-2014, it appears that Sri Lanka is headed towards 1.75 million tourist arrivals for this year, which might make the goal of 2.5 million by 2016 difficult to achieve. Thus, additional incentives to attract tourists to the country within the next two years need to be established.

The next objective to be achieved was to attract US \$3billion as Foreign Direct Investment for the country within the five years. Unfortunately, the amount of FDI in the tourism industry thus far has not been reported, but it was reported that overall FDI in Sri Lanka for the year 2013 was US \$1.42 billion, which was well shy of the \$2billion target set by the Central Bank. The goal was to record \$2.5billion for 2014, and a report of the result is still pending. However, this is marked as overall investment, thus allowing one to believe that perhaps the goal of US \$3billion FDI in tourism alone would be difficult to achieve.

Increasing tourism related employment from 125, 000 in 2010 to 500, 000 by 2016, and expansion of tourism based industry and services across the island, was the third objective laid out in the strategy. 2013 statistics reported an estimate of 112, 550 directly employed in the tourism industry, which is far from the intended target. In this regard, I take note of a discrepancy in the targets laid out in the Strategy. As stated above, the objective seeks an increase of employment in tourism above the reported 125, 000 in 2010 according to the Strategy. However, this 2010 statistic of employment is not officially reported. In fact, the statistic reported in 2010 was a total of 55, 000 directly employed in the tourist industry, and the difference of 70, 000 has not been accounted for anywhere else in SLTDA statistics. When considering groupings of direct employment, the SLTDA categorizes it as managerial, scientific and professional staff, technical, clerical, allied and supervisory staff, and manual and operative staff, with numbers reported based on employment under several categories of establishments. It is possible to consider that indirect employment might be included in the reporting of 125, 000 in 2010 which might account for the discrepancy. However, the SLTDA report does not indicate how and whether it is including indirect employment. Furthermore, the statistics as reported in the Annual Report do not take into account indirect employment, nor how indirect employment

in tourism can be accounted, as per whether it has achieved the goal set out in the Strategy. At this point it is difficult to support the objective of employment in tourism related industry, due to lack of supporting statistics. Perhaps, if there is a report on the conclusion of the Strategy, we can look at whether it has provided a means to account for indirect employment. However, this lack of citation in the Strategy is a shortcoming.

The fourth objective is difficult to quantitatively report, as it looks at distributing the economic benefits of tourism to a larger cross section of the society and integrate tourism to the rest of the economy. Though the Strategy suggests that this distribution is expected to especially advantage small and medium-sized enterprises, it is difficult to statistically account for this and it has, thus far, not been reported on.

The fifth objective looks at increasing foreign exchange earnings in tourism from US \$500million in 2010 to US \$2.75billion by 2016. Based on the report of foreign exchange earnings in tourism, US \$1.715billion was recorded in 2013, compared to \$1billion in 2012. This is an evident large leap in foreign exchange earnings over the compared years, but is again suggesting difficulty in achieving the ultimate target, like it appears to be in terms of the targeted tourist arrivals, and FDI.

The sixth and seventh objectives are also qualitative objectives, looking to have Sri Lanka tourism contribute towards improving the global trade and economic linkages of Sri Lanka, and to position Sri Lanka as the world's most treasured island for tourism. These are ambiguous and ambitious objectives. Sri Lanka is an already an active actor in the sphere of trade, exporting agricultural and manufactured commodities such as tea, rubber and garments, and relying on imports of major consumer and intermediate goods. However, the method of adding to trade and facilitating economic linkages via tourism has not been clarified in the

Strategy, and is an additional shortcoming in the goal-oriented framework. The objective to position Sri Lanka as the world's most treasured island is also an extremely ambitious one. Island tourism is a prominent form of tourism across the globe, and Sri Lanka would be battling for the top position against numerous contenders, including Caribbean islands, island destinations in the Pacific Ocean, and even the neighboring Maldives which reports 1.125 million arrivals in 2013 and US \$2.2billion in tourism receipts that same year.

The Strategy has also outlined multiple methods as means to achieve the objectives discussed above, and some of these methods are also either ambitious or vague. The strategy of creating an environment conducive for tourism looks to build on capacity by increasing the number of rooms to 45, 000 to facilitate the goal of 2.5million tourists by 2016. Based on the 2013 report, the number of rooms in graded establishment is 16, 223 and 7, 373 in supplementary establishments, which totals 23, 596 rooms. Graded establishments refer to resorts and star-rated hotels, while supplementary accommodation refers to lodgings such as motels, hostels, camping sites, guest houses, and pensions. While there could be additional establishments utilized by tourists, such as home-stays, since they are not highly used, it is not included in statistical reports. I would like to point out again a discrepancy in the statistics laid out in the Strategy, which states that in 2010 there were 22, 735 SLTDA approved rooms, whereas according to the 2013 report, that number was 20, 356 in 2010. The additional 2500 have not been accounted for or supported in the Strategy. Perhaps there is a change in definition in terms of accounting for number of rooms, but the Strategy suggests all rooms counted are those approved by the SLTDA, which one assumes is the same as the number of rooms reported in the Annual Reports of the SLTDA. However, no precise definition or citation is provided in the Strategy.

Another controversial strategy laid out in order to achieve the objectives was the strategy of attracting the ‘right-type’ of tourists. Later on in this preliminary analysis this question is addressed by the Marketing Director at the Sri Lanka Tourism Promotions Bureau, which falls under the SLTDA, but still there is the question of defining the ‘right-type’ of tourist. The Strategy suggests that this means to aim for high end tourism by appealing to high spenders. The purpose of increasing the number of high spending tourists is evident in the marketing campaigns conducted by the Promotions Bureau, which will be discussed later in this research, and the current construction of high end resorts and graded hotels such as Shangri La and the Marriot. Sri Lanka is aiming to become a resort destination, much like the Maldives, and it is a concern that this might deviate from the value of being a cultural destination, especially considering the vast array of cultural attractions in Sri Lanka. Ensuring tourism satisfaction is also considered an essential strategy in achieving the objectives laid out. According to research done by the SLTDA, 70% of the tourists who visited the country between 2009-2010 did so based on the recommendation from someone who has visited the country before. Thus, ensuring tourist satisfaction is key. This strategy is addressed in the survey research conducted by myself which is available later on in this paper.

We can see that, based on a preliminary analysis of the SLTDA tourism development strategy, there are many shortcomings, lofty ambitions and ambiguities to the goals of Sri Lanka tourism. Quantitative discrepancies and unclarified statistical reporting weigh heavily on the structure of the Strategy, and the aim towards achieving qualitative goals that cannot be measured do not help objectively identify Sri Lanka’s achievements. There is a need to revise the goals of tourism in Sri Lanka in order to ensure high satisfaction and to accrue and spread the benefits of the industry.

Public vs Private perspective

Mrs. Madhubani Perera, Director of Marketing, Sri Lanka Tourism Promotions Bureau with whom I had personal communication, addressed the question of attracting tourists to Sri Lanka and the issue in regards to attracting the right-type of tourists, as referred to above. The Bureau carried out major promotional activities, especially in India and China, to tap into new market potential. In India, the aim was to attract the “right kind” of tourists, mainly referring to high spenders. With this in mind, the Bureau launched 3-day mega promotions, conducted in Mumbai and Bangalore where high spenders reside, in high end malls and graded hotel establishments.

Similar events were also conducted in China, mainly in Beijing and Shanghai, preceded by awareness campaigns to better inform Chinese residents of Sri Lanka and what it has to offer. More than Rs.400million (approx. US \$3million dollars) was spent on promotion activities in China, which has led to good results, with China being the number three country for number of tourist arrivals in Sri Lanka. Similar promotional activities were conducted in Russia, but activities in the Middle East were limited and the Bureau looks towards expanding in this sector.

While the SLTDA and the Sri Lanka Promotions Bureau are optimistic about the goals for the future, there is some opposition and accusations leveled by private entities. In an interview with Mr. Eraj Abeywardane, Director of Studies, Institute of Hospitality in Sri Lanka, who spoke in his personal capacity, he stated that the statistics reported by the SLTDA have been grossly exaggerated. He believes that the number of tourist arrivals have been inflated by 20%, and that numbers have been duplicated. He also referred to the development, and occasional overdevelopment, of certain regions especially the East Coast which is inundated by resort facilities, and the building of hotels in Colombo and Kandy. He agrees that there is a need to

attract high end spenders, and that the infrastructure is being developed, but there are still many obstacles to achieving this goal, such as transportation issues, appropriately trained human resources, lack of quality, and clandestine transactions and dealings.

Considering the cultural attractions available in Sri Lanka, he believes that there is a need to improve on destination tourism marketing, including by establishing a niche market in the eco-tourism sector. He noted the lack of eco-friendly hotels due to the absence of guidance by the SLTDA. There is a need to expand on ecotourism, especially considering the increased focus on ecofriendly movements across the globe. He also critiqued the hotel standards especially in relation to human resources. He said that there is a need, not just for more people, but for trained, quality employment, and forecasts the potential of importing labor to ensure high quality standards in hotels. He believes this would be an unfortunate consequence, considering the availability of human capital within the country, only that there is a lack of quality and training.

Thus, the aim of the SLTDA should be to establish a better policy, especially focusing on destination marketing. He referred to the successes achieved by other Asian nations, such as Malaysia and Thailand where promotional activities hinge on destination marketing. Mr. Abeywardane stressed the necessity to take that example and have a policy tailor-made to the country, emphasizing on destination marketing.

Improving on cleanliness, sanitation, and hygiene standards at cultural attractions should also be a primary objective of the government. Mr. Abeywardane noted that at major attractions, like the Cultural Triangle, which include the sacred cities of Anuradhapura and Kandy, and ancient cities of Sigiriya, Polonnaruwa and Dambulla, tourists are charged between US \$30-40 as entrance fees at each site, and are additionally charged to use the restroom facilities which are in poor condition. He expressed his concern of regional tourism offices pocketing the fees which

are intended to be used to improve on maintenance and infrastructure. The government needs to take the lead on this matter, but with the issue of the lack of maintenance stemming from corruption in the system, finding a solution to this problem is envisioned to be much more difficult. Mr. Abeywardane did express optimism, considering the recent change in government, and looks forward to major improvements in the industry.

Thus it is evident that while the government has a positive outlook on tourism based on the objectives and strategies laid out by the SLTDA, the private sector perspective is critical of the success of tourism pursuits. There is a need to establish better policy, improve on destination marketing, expand on maintenance and provision of cleanliness and sanitary facilities, and ensure the influx of high spenders as per the perspective of both the public and private sector.

Tourism Satisfaction Survey

I conducted a tourism satisfaction survey to supplement the research in order to provide feedback on tourism in Sri Lanka. This feedback would help identify the successes and shortcomings of the work of Sri Lanka Tourism, thus allowing to develop where satisfaction falls short.

A. Participants

54 surveys were successfully completed. The surveys were handed out to tourists from various nations across the globe, spanning all the continents (excluding Antarctica). The major bias of the surveys were identified as being language barriers. Some participants had limited English proficiency and thus their answers were incomplete, did not relate to the questions asked, or were not provided due to lack of understanding.

Table A: Participants based on regions

| Region | Number of surveys |
|--------------------------|-------------------|
| Europe | 40 |
| South Asia | 1 |
| East and South East Asia | 2 |
| Middle East | 6 |
| Australia | 1 |
| South America | 1 |
| North America | 2 |
| Africa | 1 |

B. Location

Due to travel and time limitations, only three primary locations were surveyed. These locations were Sigiriya, situated in the North-Central province of Sri Lanka, Kandy in the Central Province, and Hikkaduwa in the Southern Province, which are indicated in the Tourist Map of Sri Lanka in Appendix B. The surveys done in Sigiriya were conducted on star-rated hotel premises and at the entrance to the Sigiriya Fortress. The surveys conducted in Kandy and Hikkaduwa were conducted in five-star hotel premises. Access to attractions was limited.

Table B: Numbers surveyed in location

| Location | Number of total surveys |
|-------------------|-------------------------|
| Sigiriya (Hotels) | 20 |
| Kandy (Hotels) | 19 |
| Hikkadua (Hotel) | 15 |

C. Results

The results of the survey based on responses to individual questions are identified below. The survey is provided in Appendix A. Each table provided below identifies responses to particular questions on the survey, followed by an analysis of the responses. If there were any answers to choose from that were not selected at all in the process of completing surveys, they have been removed from the tables below. It is important to note that the survey asks to choose multiple answers for one question, thus the totals do not directly relate to the number of surveys administered at any point.

Table C: Purpose of Visit**Table C:1 - Sigiriya**

| Origin of Respondent | Purpose of Visit | | | | | | |
|----------------------|------------------|----------|-----------|-----------|-------------------------------------|----------|----------|
| | Beaches | Climate | Culture | Wildlife | Best vacation value for your dollar | Shopping | Other |
| Europe | 10 | 8 | 11 | 8 | 2 | | 1 |
| South Asia | | | 1 | 1 | | | |
| East Asia | 1 | | 2 | 1 | | | |
| Australia | | | 1 | 1 | | | |
| South America | 1 | | 1 | 1 | | | |
| North America | | | 1 | 1 | 1 | 1 | |
| Total | 12 | 8 | 17 | 13 | 3 | 1 | 1 |

Table C:2 – Kandy

| Origin of Respondent | Purpose of your visit | | | | | | | | |
|----------------------|-----------------------|-----------|-----------|-----------|-------------------------------------|------------------|----------------|----------|----------|
| | Beaches | Climate | Culture | Wildlife | Best vacation value for your dollar | Hotel Facilities | Easy to get to | Shopping | Other |
| Europe | 5 | 7 | 9 | 7 | 3 | 1 | 1 | 1 | 1 |
| Middle East | 3 | 3 | 3 | 4 | 3 | 1 | 1 | | 1 |
| Australia | 1 | 1 | 1 | 1 | | | | | |
| North America | | | | | | | | | 1 |
| Total | 9 | 11 | 13 | 12 | 6 | 2 | 2 | 1 | 3 |

Table C:3 – Hikkaduwa

| Origin of Respondent | Purpose of your visit | | | | | | | |
|----------------------|-----------------------|---------|---------|----------|------------------|----------------|----------|-------|
| | Beaches | Climate | Culture | Wildlife | Hotel Facilities | Easy to get to | Shopping | Other |
| Europe | 12 | 11 | 8 | 6 | 1 | 1 | 1 | 3 |

According to the tables above it is evident that the location of the survey is reflected in the choice of visiting. In cultural centres such as Sigiriya and Kandy, the respondents tend to choose culture as their primary purpose of visit. In locations where nature is the primary attraction, as is Hikkaduwa, the majority choice was beaches, climate and wildlife. According to Table C:2, Kandy has a balance in demand for culture and nature, considering its location in the scenic hilltops of the Central Province, and it is reflected in the responses.

Table D: Where did you visit during your stay in Sri Lanka**Table D:1 - Sigiriya**

| Origin of Respondent | Places visited | | | | | | | | | | | | | |
|----------------------|----------------|-------|-------------|----------|-------|--------------|-------------|-------------|-------------|--------|-----------|--------------------|----------|-------|
| | Colombo | Kandy | Nuwaraeliya | Sigiriya | Galle | Anuradhapura | Polonnaruwa | Adam's Peak | Trincomalee | Jaffna | Pasikudah | Yala National Park | Dambulla | Other |
| Europe | 8 | 11 | 1 | 12 | 8 | 5 | 6 | 2 | 1 | | | 4 | 9 | 10 |
| South Asia | 1 | 1 | | 1 | | | | | | | | | | |
| East Asia | 2 | 2 | 1 | 2 | 1 | 1 | | | | | 1 | 1 | | |
| Australia | 1 | 1 | 1 | 1 | | 1 | | | | | 1 | 1 | 1 | |
| South America | 1 | | | 1 | | 1 | | | | | | | 1 | |
| North America | 1 | 1 | 1 | 1 | 1 | 1 | 1 | | 1 | 1 | | | 1 | |

Table D:2 – Kandy

| Origin of Respondent | Places visited | | | | | | | | | | | | | |
|----------------------|----------------|-------|-------------|----------|-------|--------------|-------------|-------------|-------------|--------|-----------|--------------------|----------|-------|
| | Colombo | Kandy | Nuwaraeliya | Sigiriya | Galle | Anuradhapura | Polonnaruwa | Adam's Peal | Trincomalee | Jaffna | Pasikudah | Yala National Park | Dambulla | Other |
| Europe | 10 | 10 | 5 | 5 | 6 | 3 | 4 | 1 | 1 | | | 2 | 2 | 10 |
| Middle East | 5 | 6 | 3 | 2 | | | | | | | | 1 | 2 | 7 |
| North America | | 1 | | | | | | | | | | | | |
| Africa | 1 | 1 | 1 | | | | | | | | | | | |

Table D:3 – Hikkaduwa

| Origin of Respondent | Places visited | | | | | | | | | | | | | |
|----------------------|----------------|-------|-------------|----------|-------|--------------|-------------|-------------|-------------|--------|-----------|--------------------|----------|-------|
| | Colombo | Kandy | Nuwaraeliya | Sigiriya | Galle | Anuradhapura | Polonnaruwa | Adam's Peal | Trincomalee | Jaffna | Pasikudah | Yala National Park | Dambulla | Other |
| Europe | 11 | 9 | 6 | 5 | 10 | 2 | 4 | 1 | 1 | | 1 | 6 | 4 | 8 |

While many visitors preferred the mainstream attractions to visit, such as prominent cultural centers like Kandy and Sigiriya, many visitors also considered locations due to nature. While many tourists visited Colombo, not many enjoyed the visit because of a lack of attractions. Many of the popular locations, in terms of a resident's point of view, are considered unattractive for many visitors. The reasons for the lack of attraction to these locations are due to distance making access very difficult, or lack of information about the location. For example, Jaffna

which is a newly opened up location, is not well known so only one person really considered visiting.

Table E: Type of lodgings

Table E:1 – Sigiriya

| Origin of Respondent | Types of Lodgings | | | | | | |
|----------------------|--------------------|----------------|--------|-------------|----------------|-----------|-------|
| | Hotel (star-rated) | Hotel (Budget) | Resort | Guest House | Rented Cottage | Home-stay | Other |
| Europe | 8 | 2 | 3 | 5 | 1 | 1 | |
| South Asia | 1 | | | | | | |
| East Asia | 2 | | | | | | |
| Australia | 1 | | | | | | |
| North America | | | | 1 | | | |

Table F:2 – Kandy

| Origin of Respondent | Types of Lodgings | | | | | | |
|----------------------|--------------------|----------------|--------|-------------|----------------|-----------|-------|
| | Hotel (star-rated) | Hotel (Budget) | Resort | Guest House | Rented Cottage | Home-stay | Other |
| Europe | 11 | | | | | | |
| Middle East | 6 | | | | | | |
| Africa | 1 | | | | | | |
| North America | | | 1 | | | | |

Table F:3 – Hikkaduwa

| Origin of Respondent | Types of Lodgings | | | | | | |
|----------------------|--------------------|----------------|--------|-------------|----------------|-----------|-------|
| | Hotel (star-rated) | Hotel (Budget) | Resort | Guest House | Rented Cottage | Home-stay | Other |
| Europe | 13 | 1 | 3 | 2 | | | |

Star-rated hotels and resorts were the preferred types of lodgings among almost all respondents. The few respondents who preferred staying in rented cottages or guest houses were younger people who wanted to engage with the residents living around them. A respondent from Germany whom I spoke to in Hikkaduwa had visited Sri Lanka on multiple occasions due to his father’s academic interest in the country, and he indicated that visitors stay in star-rated hotels due to a lack of interest in engaging in their surroundings. In Hikkaduwa the survey was conducted in the afternoon and the tourists were lounging in the sun, drinking a beer and engaging in conversation. This respondent used this to exemplify that the tourists priority was to disengage from their location, which shouldn’t be the case because of all that Sri Lanka has to offer. What the respondent believed is that Sri Lanka’s main aim was to promote star-rated hotels and resorts. The priority is high-spenders, which might not always be a good target group. He doesn’t see a change in this mission, but he suggests that having tourists engage with the area around them would spread the word about Sri Lanka more.

Table G: Cleanliness rating

Table G:1 – Sigiriya

| Origin of Respondent | Levels of cleanliness | Cleanliness Rating | | | | | | | |
|----------------------|-----------------------|--------------------|-------|----------|-------|-------------|--------------------|----------|-------|
| | | Colombo | Kandy | Sigiriya | Galle | Adam's Peak | Yala National Park | Dambulla | Other |
| Europe | Very Clean | 1 | 1 | 5 | 1 | | | | |
| | Clean | 1 | 2 | 5 | | | 1 | 2 | 1 |
| | Neutral | 1 | 1 | | | 1 | | | |
| | Unclean | 1 | | | 2 | | | 1 | 1 |
| | Very Unclean | 2 | | | | | | | 1 |

In terms of cleanliness, there weren't consistent opinions on the cleanliness of the places visited. Many did express neutrality regarding Colombo, especially tourists surveyed in Hikkaduwa, mainly because the stay in Colombo was brief before travelling to other parts of the country. However, it must also be noted that especially in Hikkaduwa and Kandy, the responses were recorded as cleanliness of the immediate vicinity, mostly within the hotel premises. Hotel premises are kept clean by the management, thus the respondents related their measurement of cleanliness based on hotel management. However, some respondents who visited specific attractions noted the need for clearing of garbage, more trash cans, and much better upkeep of the infrastructure in terms of drainage systems and sanitary facilities. There is much to be improved in these areas.

Table H: Likelihood of recommending Sri Lanka as a tourist destination

Table H:1 – Sigiriya

| Origin of Respondent | Likelihood of Recommendation | | | | |
|----------------------|------------------------------|--------|---------|----------|---------------|
| | Very Likely | Likely | Neutral | Unlikely | Highly Likely |
| Europe | 10 | 2 | 1 | 2 | |
| South Asia | | | 1 | | |
| East Asia | 2 | | | | |
| Australia | 1 | | | | |
| South America | 1 | | | | |
| North America | 1 | | | | |

Table H:2 – Kandy

| Origin of Respondent | Likelihood of Recommendation | | | | |
|----------------------|------------------------------|--------|---------|----------|---------------|
| | Very Likely | Likely | Neutral | Unlikely | Highly Likely |
| Europe | 8 | 3 | | | |
| Middle East | 4 | 2 | | | |
| North America | 1 | | | | |
| Africa | | 1 | | | |

Table H:3 – Hikkaduwa

| Origin of Respondent | Likelihood of Recommendation | | | | |
|----------------------|------------------------------|--------|---------|----------|---------------|
| | Very Likely | Likely | Neutral | Unlikely | Highly Likely |
| Europe | 9 | 6 | | | |

While just two tourists responded that they were unlikely to recommend Sri Lanka, those who suggested likely or neutral based their recommendation on the poor infrastructure. Travel time between locations were long due to bad roads and lack of highways. Some also indicated that the prevalence of garbage around attractions also made it unattractive.

Additional Comments

The majority of the respondents identified that the source of information about Sri Lanka tended to come from recommendations from previous visitors. Some also responded to promotions and advertisements. Many also noted that Sri Lanka was a well-known destination that they intended to visit in the first place based on prior knowledge of the country.

In terms of lengths of stay in the country, stays tended to vary between 7-30 days of stay. Very few respondents planned to stay for longer than a month. Itineraries tended to depend on pre-purchased packages, and only a small minority of tourists travelled on personal itineraries. The recommendation of certain locations also varied. Some favored more natural sites as opposed to cultural, and quite a few expressed distaste for sites due to lack of maintenance and difficulty in access. Additional comments made by tourists mainly suggested that their interactions with the local peoples have been positive, and most complaints were regarding lack of infrastructure development in terms of transportation, roads and highways and the length of travel between one location to another.

Conclusions

Statistically, it seems like Sri Lanka has made a lot of progress. Annual reports indicate that Sri Lanka is on its way to achieving the goals it had intended to achieve, as laid out in their Strategy, but further analysis notes that there is still a long way to go. The potential of reaching the target is diminishing as it gets closer to the year 2016. It is clear that the focus has been on improving numbers in inflows, especially focusing on high-spending markets. The foray into new markets also concentrates on the high spending markets as opposed to others, as could be inferred by the promotional strategies in various countries. The improvement in accommodation has also been focused on star-rated hotels and resorts as opposed to other facilities due to the main focus on high spenders. Furthermore, the qualitative shortcomings of multiple objectives laid out in the Strategy developed in 2011 make it difficult to identify whether there has been improvement in multiple areas, such as Sri Lanka becoming the foremost island destination in the world, a difficult objective in the first place. With the new government in place, however, there is an expectation for a new methodology to be set out in order to improve tourism. Monitoring what new plans are to be laid out and analyzing it in future, especially in comparative terms to the previous strategy, can identify whether there has been significant improvement in the pursuit of tourism excellence or whether it has fallen short once more.

Cleanliness has not been a major concern for Tourism authorities. The responsibility for cleanliness in certain locations, such as cultural sites, has been entrusted to the Cultural Heritage Fund. The claim is that the charging of ticket prices in certain locations, such as in Sigiriya and Kandy, has been used for maintenance and cleanliness, though according to the responses not many tourists observe this. There needs to be a much bigger effort towards maintenance and

cleanliness. It could be suggested that there be further research into the measures taken by institutions responsible for cleanliness and maintenance.

Improving infrastructure has to be a priority for the government. Transportation infrastructure has improved in many ways, such as the development of the highways between Colombo and the Bandaranaike International Airport in Katunayaka, as well the highway between Matara and Kottawa. However, there is still a long way to go. Infrastructure changes needs to be a priority of the government, especially in terms of access to locations further away from the capital. With the conclusion of the civil war in 2009, many parts of the country have opened up. The Eastern coast of Sri Lanka has amazing natural beauty to offer, especially beaches, and Jaffna is an unexplored region that has undiscovered gems waiting for wandering travelers to alight on. Sri Lanka looks to have tourism play a bigger role in the economy. Until improvements in infrastructure and cleanliness are also undertaken, as well as not just focusing on high spending groups, Sri Lanka cannot become a globally recognized contender as a must-see tourism location.

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Glossary

| | | |
|---------------------|---|--|
| CTB | - | Ceylon Tourist Board |
| SLTDA | - | Sri Lanka Tourism Development Authority |
| FDI | - | Foreign Direct Investment |
| The Strategy | - | Sri Lanka Tourism Development Strategy 2011-2016 |

Appendix A

Tourism Exit Survey – Sri Lanka

1) Where are you from? (Country of origin) _____

2) How many, including yourself, visited the country? _____

3) What was the purpose of your visit to Sri Lanka?

- Business Trip..... []
- Accompanying family member on business trip... []
- Convention/Conference..... []
- Honeymoon..... []
- Vacation..... []
- Visiting friends or relatives..... []
- Personal business or family matter..... []
- Other _____ []

4) Why did you choose to visit Sri Lanka?

- Beaches ()
- Climate ()
- Culture ()
- Wildlife ()
- Best vacation value ()
- Hotel facilities ()
- Easy to get to ()
- Shopping ()
- Other (Please write in) _____

5) Where did you hear about Sri Lanka?

6) How long was your stay in Sri Lanka?

_____ no. of days

7) Where did you visit during your stay in Sri Lanka? (Check all that apply)

- | | |
|--------------------|------------------------|
| • Colombo () | Adam’s Peak () |
| • Kandy () | Trincomalee () |
| • Nuwaraeliya () | Jaffna () |
| • Sigiriya () | Pasikudah () |
| • Galle () | Yala National Park () |
| • Anuradhapura () | Dambulla () |
| • Polonnaruwa () | Other _____ |

8) What type of lodgings did you mostly utilize during your stay on Sri Lanka (Check all that apply)

- Hotel (star-rated) ()
- Hotel (budget) ()
- Resort ()
- Guest house ()
- Rented cottage ()
- Home-stay ()
- Other _____

9) What was your favorite location/attraction during your visit here in Sri Lanka? Why?

10) What was your least favorite location/attraction? Why?

11) What was your opinion on the maintenance and cleanliness of the places you visited? (1 – Very unclean, 2 – Unclean, 3 – Neutral, 4 – Clean, 5 – Very Clean)

- | | |
|--------------------|------------------------|
| • Colombo () | Adam’s Peak () |
| • Kandy () | Trincomalee () |
| • Nuwaraeliya () | Jaffna () |
| • Sigiriya () | Pasikudah () |
| • Galle () | Yala National Park () |
| • Anuradhapura () | Dambulla () |
| • Polonnaruwa () | Other _____ |

12) How likely are you to recommend visiting Sri Lanka to a friend/family?

- | | | | | |
|-------------|--------|---------|----------|-----------------|
| Very Likely | Likely | Neutral | Unlikely | Highly Unlikely |
| () | () | () | () | () |

13) Additional comments you would like to make about your visit to Sri Lanka.

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