



SeaGoingGreen

Case Study

SRI LANKA - MARINE TOURISM DEVELOPMENT

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CONTEXT

Referred to as the “Wonder of Asia”, Sri Lanka is home to vast biodiversity-rich marine ecosystems dotted around the entirety of its coastline. Sri Lanka’s unique coral reef and mangrove ecosystems, picturesque beaches and the presence of numerous species of dugongs, dolphins and whales, have put the destination on traveler’s radar. These natural assets have positioned marine tourism as one of the island’s fastest growing tourism markets in parallel with an overall rise in arrivals; rising 207% in 2022 (SLTDA) and generating \$500 million by the end of quarter one in 2023 (Central Bank).

Diving, snorkeling, surfing, fishing and other leisure activities stand out as Sri Lanka’s most sought after marine activities, appealing to as many as 80% of European visitors, who make up the majority of tourism arrivals according to SLTDA. Cognizant that the potential for growth is huge, the opportunity to develop Sri Lanka’s marine tourism offering into a world-class marine tourism destination is tangible and in reach.

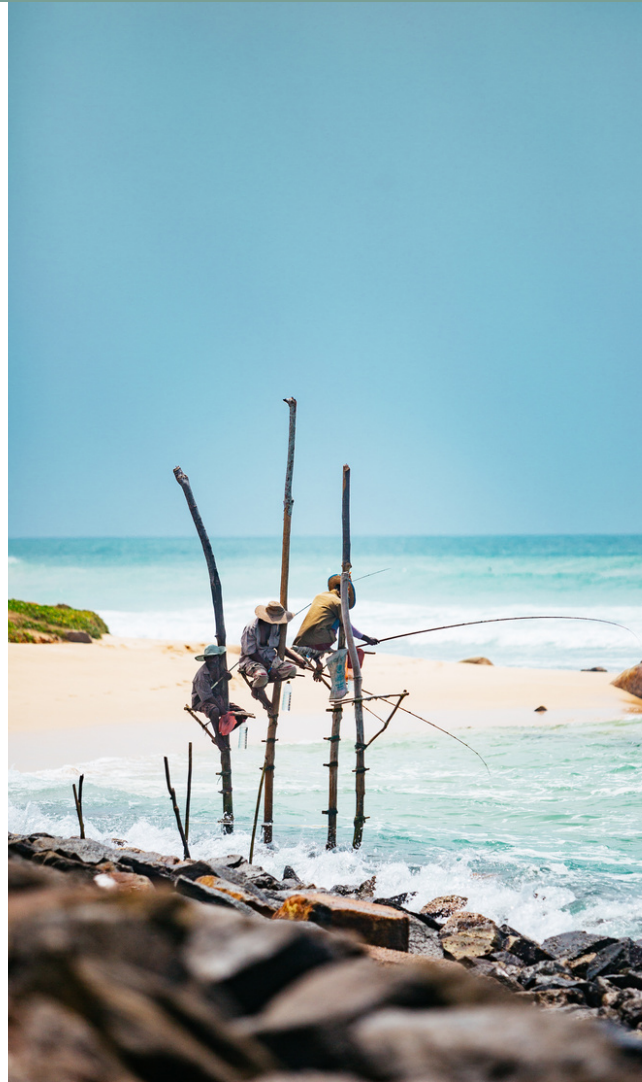
Sri Lanka aspires to offer marine tourism products and services on par with leading destinations in the Asia-Pacific region, Australia and the Caribbean, who consistently attract elusive high-value tourists. In order to appeal to high-value tourists, these destinations offer luxury accommodations, including unique stays at water-bungalows, opportunities for yacht chartering and event hosting, high quality and niche diving experiences and hospitality services that meet international standards.

Sri Lanka’s competitiveness will require standardizing the quality of tourism products and services, introducing luxury services and accommodation offerings and developing niche activities such as shipwreck diving and leisure yachting that entice lifestyle tourists to visit the island.

THE PROJECT

The Asian Development Bank (ADB) commissioned the project, “TA-9881 SRI: Supporting Tourism Resilience” to develop a roadmap for marine tourism development for the purpose of supporting the efforts of the Sri Lanka Tourism Development Authority (SLTDA) to enhance Sri Lanka’s marine tourism offering. Sea Going Green was awarded the project for the initial scope of Kalpitiya, Galle and Trincomalee with an extended contract to cover the Northern Province destinations of Jaffna, Mannar and the north eastern coastal belt.

While the possibilities for Sri Lanka’s marine tourism industry are plentiful, the industry faces substantial challenges that will need to be overcome before it can reach its full potential. Sri Lanka’s many coastal areas have faced unequal development with the southern coast hosting a more developed and diversified industry compared with destinations in the Northern Province. The quality and diversity of products and services often fluctuate within destinations, causing the offering to lack reliability and standardization that meets international tourist demand.





THE CHALLENGE

Throughout the entirety of the country, the tourism industry is still largely informal with many tourism services operating as unregulated businesses, without having to adhere to regulations or guidelines set out by the Sri Lanka Tourism Development Authority (SLTDA).

Many unregistered businesses continue to offer wildlife watching (whale sightseeing), often leading to unsustainable interactions with wildlife. This not only causes harm to marine species, but also the ability for registered businesses to offer these experiences as species become far and few between. Apart from this, infrastructural shortcomings (restrooms, changing areas, potable water, waste bins and sunbeds) in coastal areas lower the quality of Sri Lanka's existing products and services. This is especially relevant for one of the country's most promising activities, diving, where decompression chambers are found in only two areas of the country, far from the south coast, where the majority of activities are located.

The presence of dynamite fishing, an issue that is plaguing Sri Lanka's many coral reef ecosystems, threatens the health and safety of divers, but also, if left unabated through stricter punishment and enforcement, will collapse the fishery sector and with that, the diving industry.

Therefore, without significant efforts to combat these challenges and raise the standard of the existing tourism offering, Sri Lanka will face a long and daunting road to realizing its ambitions.



OUR SERVICE

In keeping with Sri Lanka's ambition to leverage marine tourism as a catalyst for tourism development and post-covid recovery, Sea Going Green delivered an inception report, market analysis, spatial and zonation report (with an environmental inventory mapping), key infrastructure development report, marine tourism anchor product summary, governance framework, and marine tourism strategy and roadmap for Scope 1 (Kalpitiya, Galle and Trincomalee) and Scope 2 (Jaffna, Mannar and the north eastern coastal belt) destinations.

Deliverables combined desktop research, empirical findings, and insights from (three) on site stakeholder consultations (with high level, industry-specific and informal sector stakeholders), culminating into a compilation of short, medium and long-term site-specific recommendations and a summary of each destinations' conservation requirements, zonation gaps, infrastructural needs and anchor products.



OBJECTIVES MET



Desktop research
and market analysis



Stakeholder
consultations



Site-specific
reports



Policy recommendations
for marine tourism
development

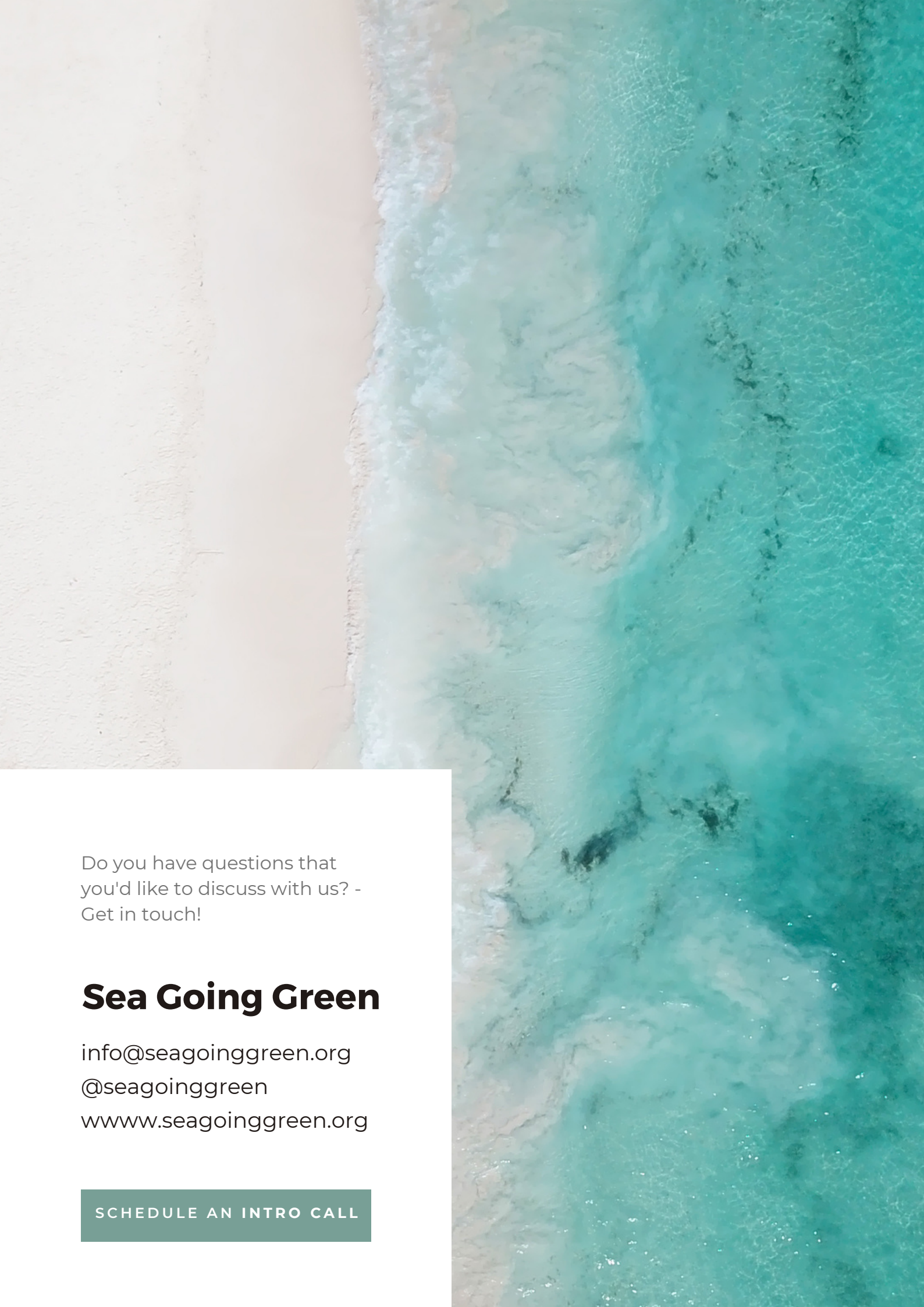


Marine tourism
strategy and
roadmap

& MORE

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