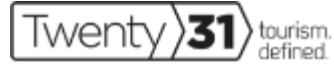




With the technical assistance of:



BENCHMARKING SRI LANKA'S DESTINATION BRAND AND TRAVEL OUTLOOK

A TOPLINE PRESENTATION BASED ON A CUSTOM DESTINATION BRAND SURVEY OF INTERNATIONAL TRAVEL CONSUMERS

November 2021



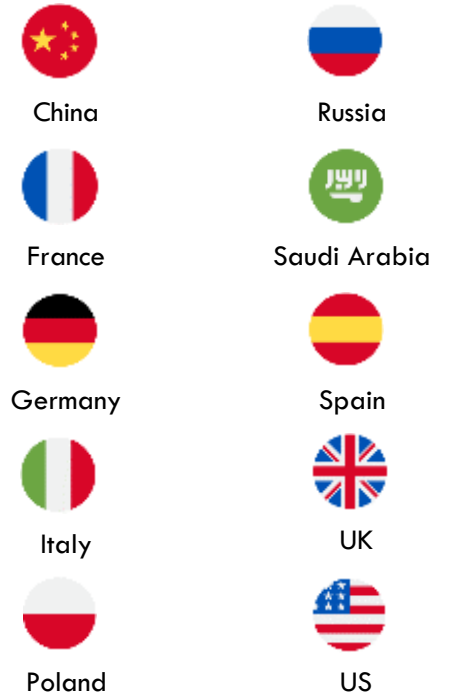


THIS RESEARCH BENCHMARKS SRI LANKA'S DESTINATION BRAND AND PROVIDES A PROFILE OF SRI LANKA'S IDEAL TRAVEL CONSUMER

- Market research study conducted in May, 2021 with identified travel consumers in 10 major outbound travel markets.
- Online survey methodology, providing statistically representative results with n=1,000 responses in each of the markets.
- Designed to provide an accurate read of Sri Lanka's destination brand; how travellers plan and book travel; and identify Sri Lanka's ideal travel consumer.
- Used to develop marketing, PR and product development by leading NTOs and their partners:



SURVEY MARKETS



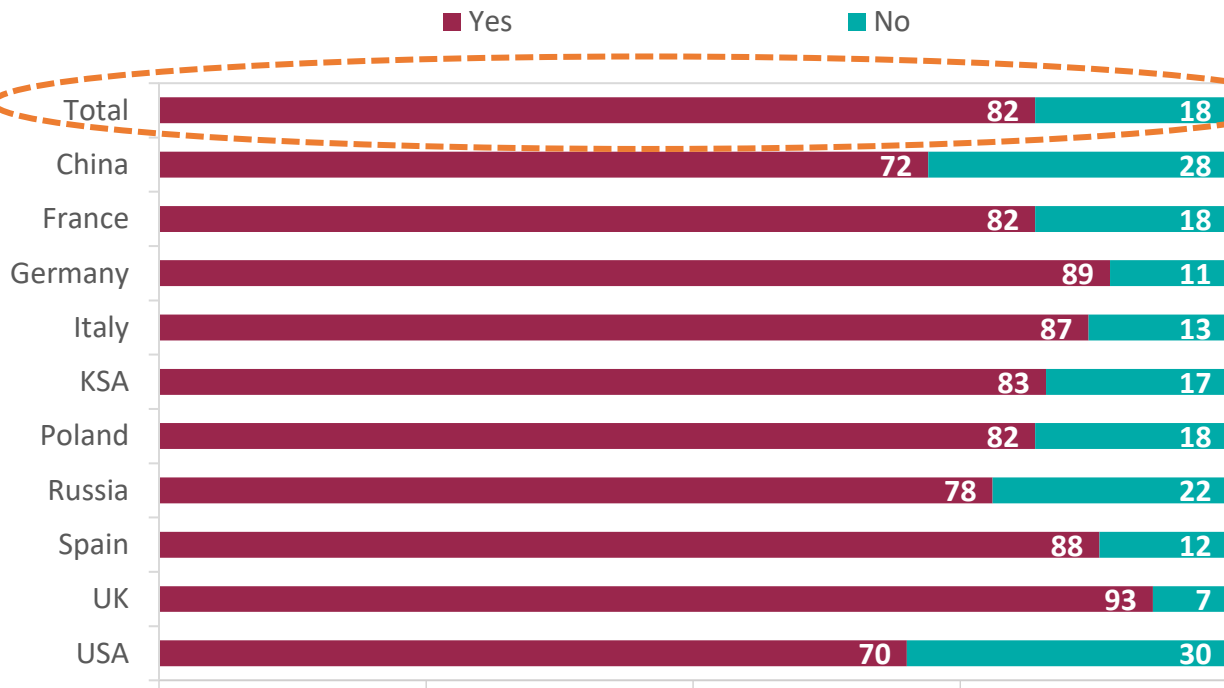
Note: a separate study assesses perception of Sri Lanka in Australia



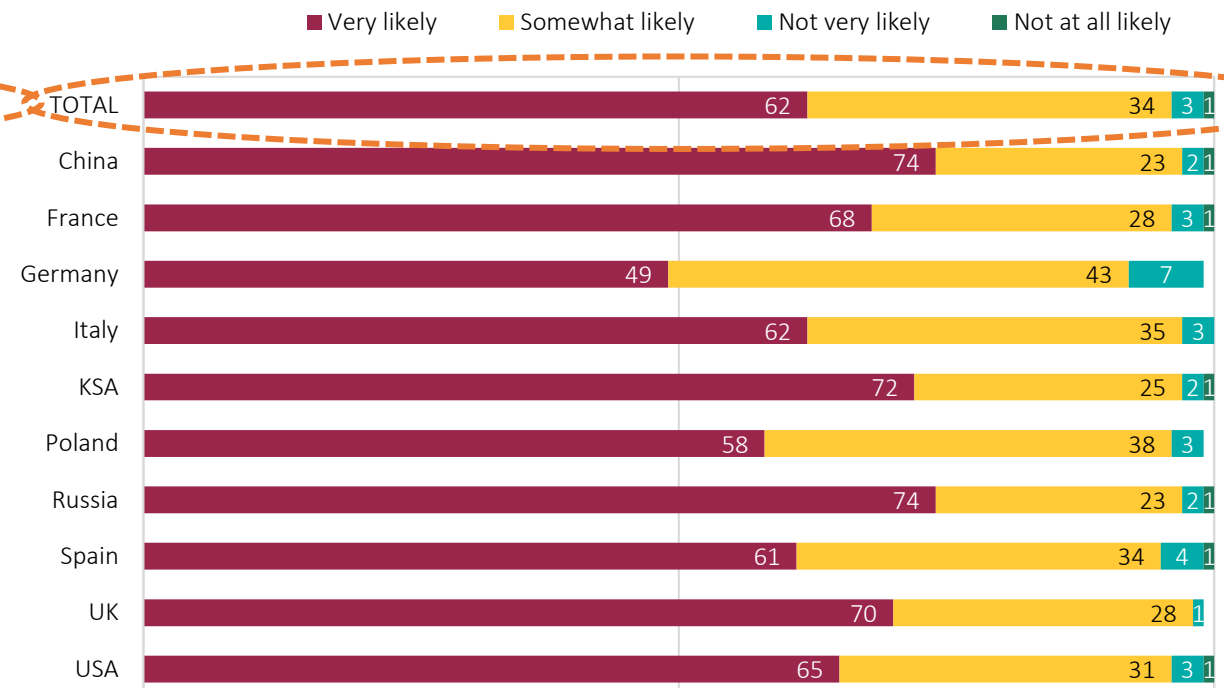


PRIOR TO COVID-19, 82% OF CONSUMERS TRAVELLED INTERNATIONALLY; POST COVID-19, THE MARKET HAS SHRUNK WITH 62% OF CONSUMERS EXPRESSING INTEREST TO TRAVEL IN THE FUTURE.

REPORTED INTERNATIONAL LEISURE TRAVEL OVER PAST THREE YEARS



LIKELIHOOD TO TRAVEL IN NEXT THREE YEARS





SPAIN, ITALY AND FRANCE DOMINATE FUTURE TRAVEL WISH-LISTS, FOLLOWED BY JAPAN, GREECE, EGYPT AND TURKEY. SCORES FOR SRI LANKA ARE 1% OR LESS.

FUTURE HOLIDAY DESTINATIONS CURRENTLY BEING CONSIDERED – TOP 10 DESTINATIONS

	Total	China	France	Germany	Italy	KSA	Poland	Russia	Spain	UK	USA
1st	Spain (19%)	Japan (33%)	Italy (31%)	Spain (32%)	Spain (34%)	Egypt (42%)	Spain (35%)	Turkey (43%)	France (32%)	Spain (37%)	Italy (20%)
2nd	France (16%)	USA (16%)	Spain (31%)	Italy (29%)	France (29%)	UAE (18%)	Greece (27%)	Egypt (30%)	Italy (31%)	USA (21%)	France (17%)
3rd	Italy (15%)	France (15%)	Greece (14%)	Greece (17%)	Greece (20%)	Bahrain (14%)	Germany (19%)	Italy (16%)	USA (17%)	France (19%)	Canada (16%)
4th	Egypt (14%)	Thailand (14%)	USA (11%)	France (16%)	USA (12%)	France (11%)	Croatia (19%)	Spain (12%)	Germany (16%)	Italy (19%)	Mexico (14%)
5th	Greece (13%)	Singapore (14%)	Canada (10%)	USA (13%)	Egypt (12%)	Morocco (11%)	France (17%)	Greece (12%)	Portugal (15%)	Greece (17%)	Japan (11%)
6th	USA (11%)	Republic of Korea (12%)	Japan (9%)	Netherlands (9%)	Egypt (10%)	Malaysia (9%)	Egypt (15%)	Germany (12%)	Egypt (11%)	Portugal (11%)	Australia (10%)
7th	Germany (9%)	Egypt (11%)	Morocco (9%)	Portugal (8%)	Portugal (8%)	USA (7%)	USA (10%)	France (11%)	Greece (11%)	Turkey (8%)	Ireland (10%)
8th	Japan (9%)	UK (10%)	Egypt (8%)	Croatia (7%)	UK (7%)	Lebanon (6%)	Portugal (10%)	Thailand (10%)	UK (10%)	Egypt (7%)	Spain (9%)
9th	Portugal (6%)	Australia (9%)	Germany (6%)	Thailand (6%)	Japan (7%)	UK (5%)	Norway (6%)	China (9%)	Japan (8%)	Australia (7%)	Germany (9%)
10th	Turkey (6%)	Germany (8%)	Thailand (5%)	Norway (6%)	Australia (6%)	Japan (5%)	Tunisia (5%)	Cyprus (8%)	Mexico (7%)	Germany (6%)	UK (9%)
	Sri Lanka (<1%)	Sri Lanka (<1%)	32nd Sri Lanka (1%)	Sri Lanka (<1%)	Sri Lanka (<1%)	25th Sri Lanka (1%)	Sri Lanka (<1%)	Sri Lanka (<1%)	Sri Lanka (<1%)	Sri Lanka (1%)	Sri Lanka (<1%)

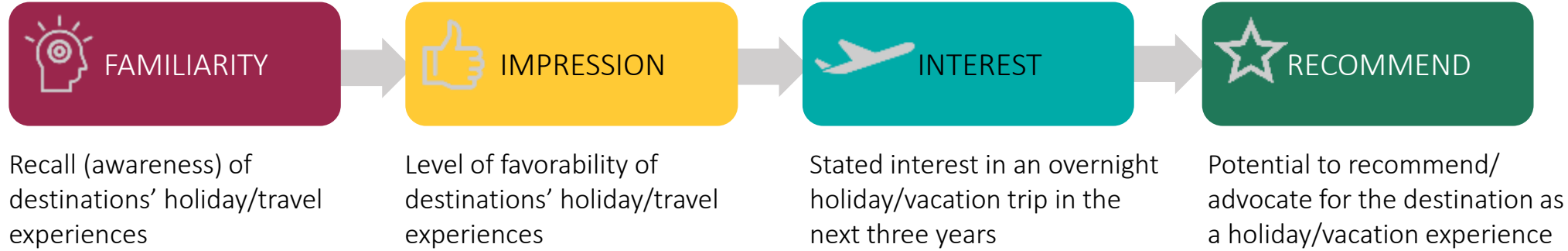
Base per country: Total n=10054, China n=1016, France n=1002, Germany n=1000, Italy n=1003, KSA n=1002, Poland n=1021, Russia n=1004, Spain n=1000, UK n=1005, USA n=1001
 Base: All Respondents
 Q12. Looking forward to the next three years, which countries are you considering as possible holiday/vacation travel destinations, apart from your own?
 You may mention up to three. Please type the first few letters of your destination and then click to select the correct item from the list.





DESTINATION BRANDS CAN BE MEASURED VIA MYRIAD VARIABLES LINKED TO THE TRAVEL CONSUMER PATH-TO-PURCHASE

MEASURING SRI LANKA'S DESTINATION BRAND HEALTH



- We asked a series of prompted questions focused on Sri Lanka and a set of 8 specific competitive destinations: Kenya, Botswana, Seychelles, Turkey, Greece, Jordan, Morocco, Tunisia.
- Taken together, these four questions are a basket of measures to evaluate the overall brand health of the destination.



31% OF TRAVEL CONSUMERS ARE FAMILIAR WITH SRI LANKA AS A TRAVEL DESTINATION – WITH FAMILIARITY HIGHEST IN CHINA AND KSA. SRI LANKA IS ON PAR WITH KENYA AND JORDAN.

FAMILIARITY WITH TOURISM OFFERING OF DIFFERENT DESTINATIONS

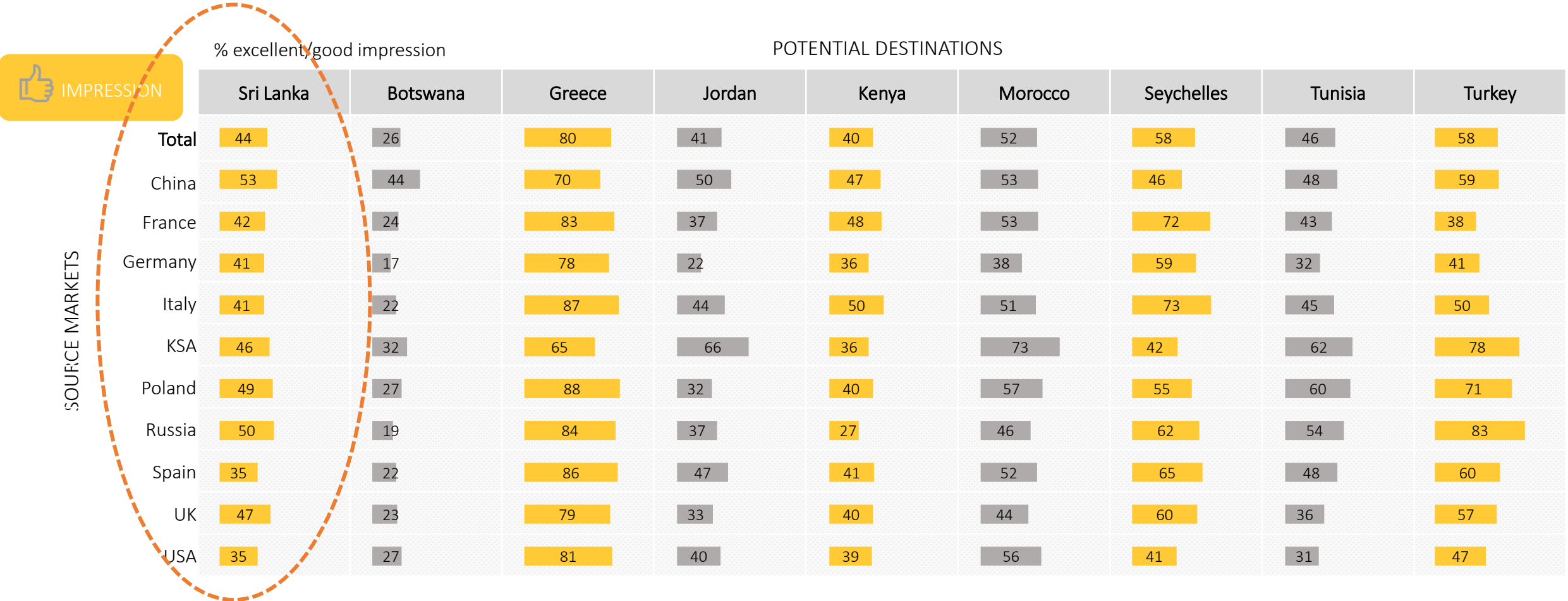


Base per country: China n=1016, France n=1002, Germany n=1000, Italy n=1003, KSA n=1002, Poland n=1021, Russia n=1004, Spain n=1000, UK n=1005, USA n=1001. Total n=10054
 Base: All Respondents
 Q14. How familiar are you with each of the following tourism destinations in terms of what they have to offer as holiday/vacation travel experiences?



44% OF TRAVEL CONSUMERS HAVE A POSITIVE IMPRESSION OF SRI LANKA'S TRAVEL EXPERIENCE WITH RATINGS RELATIVELY CONSISTENT ACROSS SOURCE MARKETS.

OVERALL IMPRESSION OF TOURISM OFFERING OF DIFFERENT DESTINATIONS



Base per country: China n=1016, France n=1002, Germany n=1000, Italy n=1003, KSA n=1002, Poland n=1021, Russia n=1004, Spain n=1000, UK n=1005, USA n=1001. Total n=10054
 Base: All Respondents
 Q15. What is your overall impression of the following tourism destinations in terms of what they have to offer as holiday/vacation travel experiences?



38% OF TRAVEL CONSUMERS ARE INTERESTED TO TRAVEL TO SRI LANKA IN THE NEAR FUTURE FOR A HOLIDAY. RESULTS ARE HIGHLY DEPENDENT ON MYRIAD FACTORS, ESPECIALLY THE COVID-19 SITUATION.

INTEREST IN TRAVEL TO DIFFERENT DESTINATIONS



		% very/somewhat interested								
		POTENTIAL DESTINATIONS								
		Sri Lanka	Botswana	Greece	Jordan	Kenya	Morocco	Seychelles	Tunisia	Turkey
SOURCE MARKETS	Total	38	23	75	34	34	46	49	39	50
	China	54	42	69	50	49	53	45	48	60
	France	33	19	78	27	36	45	60	33	31
	Germany	33	15	69	16	28	30	46	24	32
	Italy	34	21	82	37	41	45	64	38	41
	KSA	41	30	62	58	34	67	41	55	74
	Poland	43	22	84	26	35	51	49	54	59
	Russia	42	16	77	28	21	40	51	45	72
	Spain	32	20	78	37	33	42	51	36	48
	UK	34	20	72	26	30	38	48	29	46
	USA	32	27	76	35	33	51	34	28	38



Base per country: China n=1016, France n=1002, Germany n=1000, Italy n=1003, KSA n=1002, Poland n=1021, Russia n=1004, Spain n=1000, UK n=1005, USA n=1001. Total n=10054
 Base: All Respondents
 Q13. How interested, if at all, are you in taking an international overnight holiday/vacation trip in the next three years to each of the following destinations?



41% OF TRAVEL CONSUMERS WOULD RECOMMEND SRI LANKA AS A HOLIDAY DESTINATION WITH RATINGS HIGHEST IN EASTERN, NOT WESTERN EUROPE.

LIKELIHOOD TO RECOMMEND DIFFERENT DESTINATIONS



% very/somewhat likely

POTENTIAL DESTINATIONS

SOURCE MARKETS

	Sri Lanka	Botswana	Greece	Jordan	Kenya	Morocco	Seychelles	Tunisia	Turkey
Total	41	25	75	38	38	49	53	44	54
China	35	37	36	35	35	35	34	35	36
France	39	24	81	34	43	50	67	39	37
Germany	37	16	74	20	35	34	54	31	38
Italy	37	22	86	41	48	51	69	42	45
KSA	45	31	67	65	36	74	41	63	77
Poland	51	25	88	33	41	59	56	63	71
Russia	53	18	85	34	26	46	63	52	82
Spain	39	25	82	47	41	50	58	46	59
UK	42	23	75	30	36	41	53	34	54
USA	35	28	78	38	37	54	35	31	46



Base per country: China n=1016, France n=1002, Germany n=1000, Italy n=1003, KSA n=1002, Poland n=1021, Russia n=1004, Spain n=1000, UK n=1005, USA n=1001. Total n=10054

Base: All Respondents

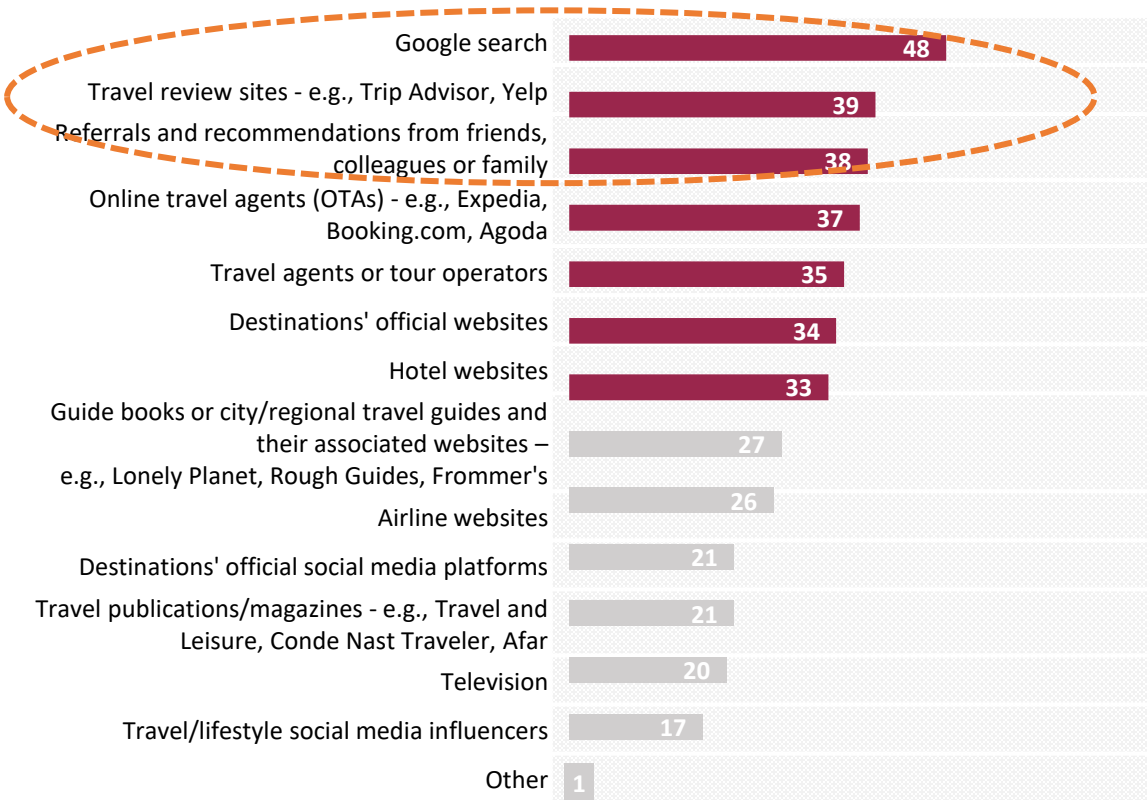
Q16. How likely, if at all, would you be to recommend the following tourism destinations in terms of what they have to offer as holiday/vacation travel experiences?



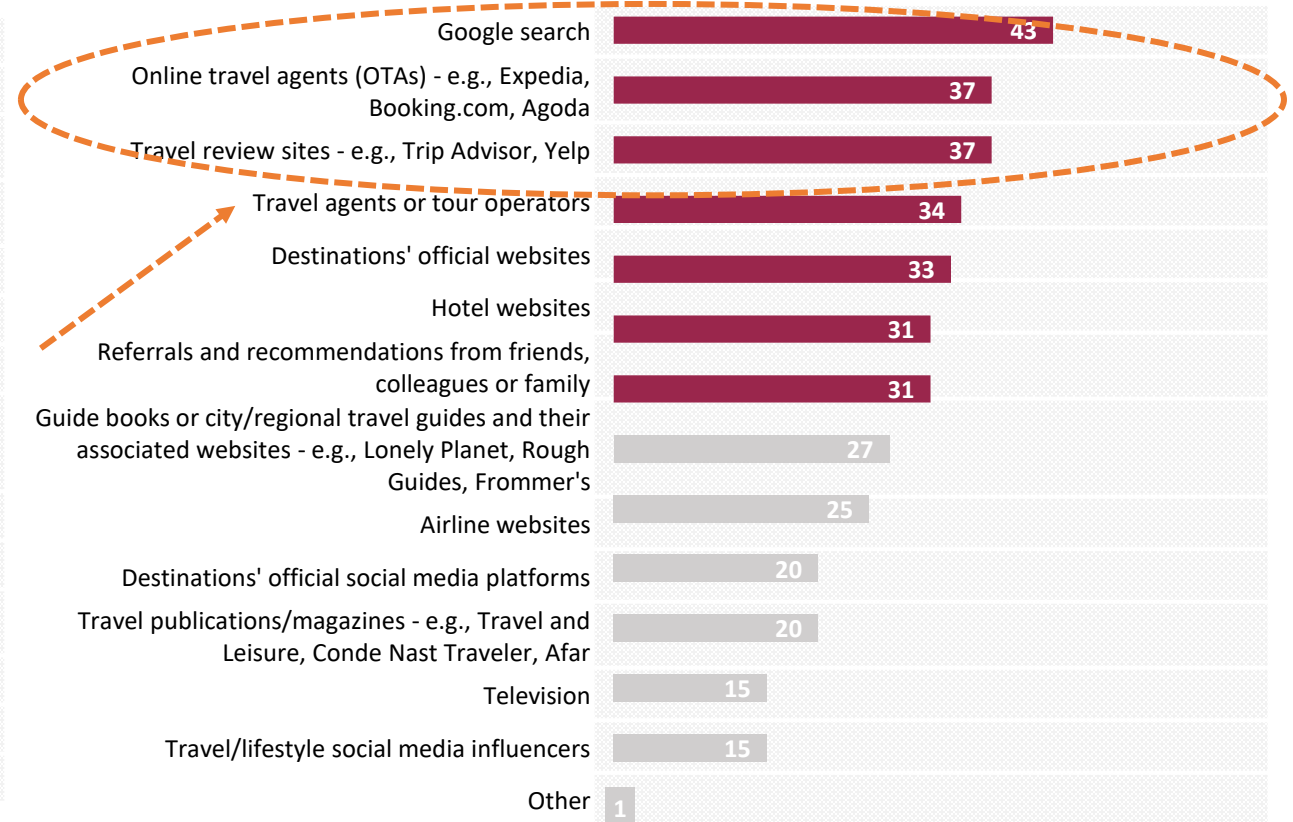


THE MARKET CONTINUES TO SHIFT TO A PREDOMINANTLY DIGITAL CHANNEL BASED PLANNING PROCESS, WITH HUMAN CONNECTION.

TOP SOURCES OF DESTINATION INSPIRATION



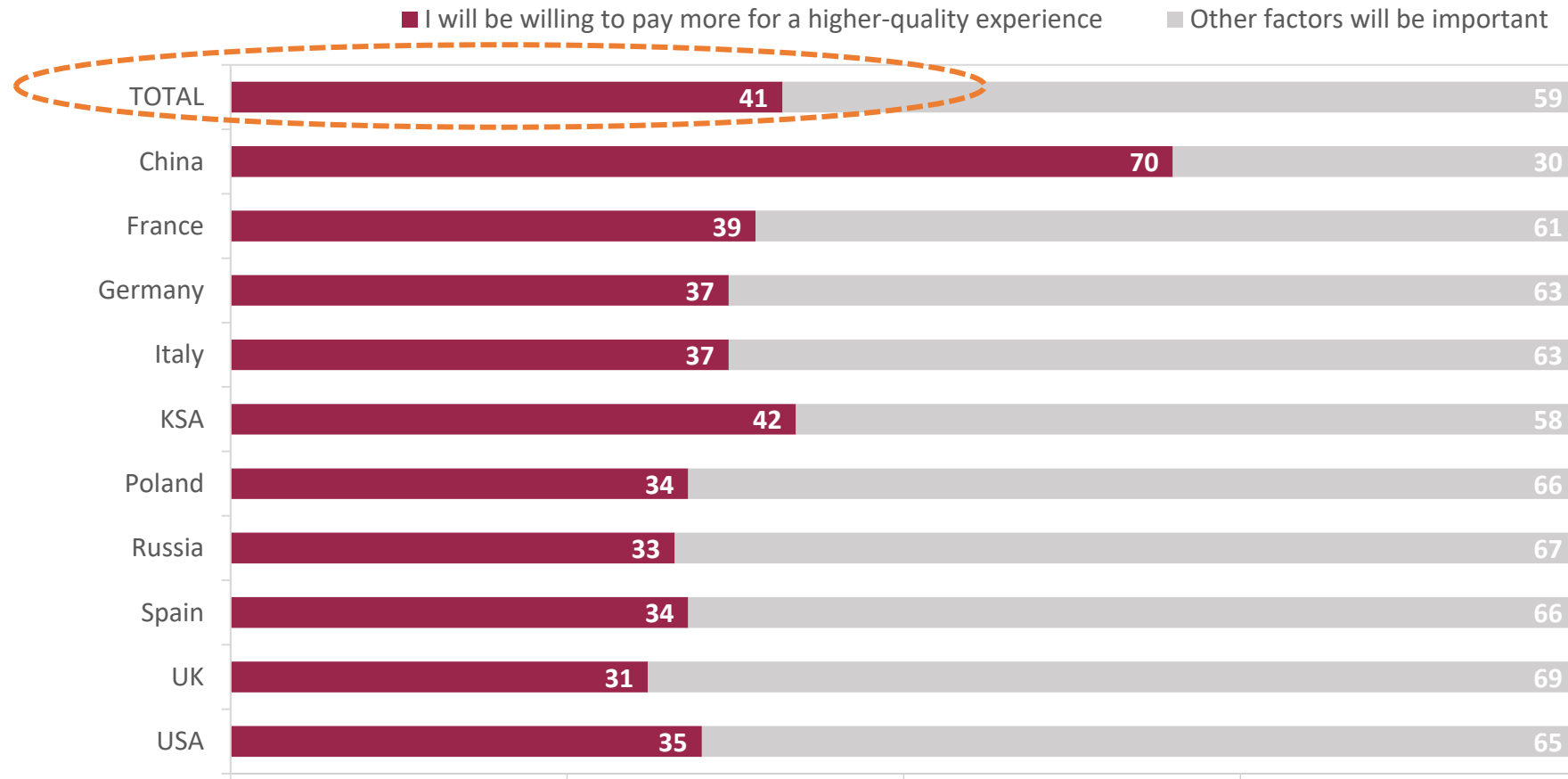
TOP SOURCES OF INFORMATION TO AID TRIP PLANNING





THE EMERGING POST-COVID-19 TRAVEL CONSUMER IS SEEKING A HIGHER-QUALITY EXPERIENCE AND IS WILLING TO PAY; PRICE SLASHING IS NOT NEEDED TO STIMULATE TRAVEL TO SRI LANKA.

TRAVEL PRIORITIES AFTER COVID-19 PANDEMIC





THE EMERGING POST-COVID-19 TRAVEL CONSUMER INTERESTED IN SRI LANKA IS ALSO SOCIALLY AND ENVIRONMENTALLY CONSCIOUS .

SUSTAINABLE TOURISM IS BECOMING MAINSTREAM



Social and Environmental Values Increasingly Drive Consumers' Choices, According to New Research

Nearly nine in ten people who recognise the Fairtrade label trust it, compared with much lower trust in companies' self-reported sustainability performance

Sustainable Business Practices

Research: Actually, Consumers Do Buy Sustainable Products

by Tensie Whelan and Randi Kronthal-Sacco

June 19, 2019



Shana Novak/Getty Images

Summary. For years, brand managers have grouched that consumers say they intend to buy sustainable products but don't actually buy them. Companies have used this conventional wisdom as justification for not making their products more sustainable. A new study... [more](#)

For years, brand managers have grouched that while consumers say they intend to buy sustainable products, in store they don't actually purchase them. This conventional wisdom has been used by many brands as justification for not making their products more sustainable.

CLIMATE AND ENVIRONMENT | News

Yes, there really is a 'Greta Thunberg effect,' new research reveals

Ryan Flanagan CTVNews.ca Producer
@flanaganryan | Contact
Published Thursday, February 4, 2021 9:56AM EST



Swedish climate activist Greta Thunberg speaks with the media as she arrives for a meeting of the Environment Council at the European Council building in Brussels, Thursday, March 5, 2020. (AP Photo/Virginia Mayo)

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TORONTO -- The celebratization of young activist Greta Thunberg actually did help convince some of her fans to think they should take action on the climate crisis, according to new research.

Thunberg, who was recently nominated for a Nobel Peace Prize, rocketed to worldwide fame in 2018 when, at the age of 15, she became the leader of the Fridays for Future

Advertisement

MOST-WATCHED



CTV National News for Monday, November 29, 2021



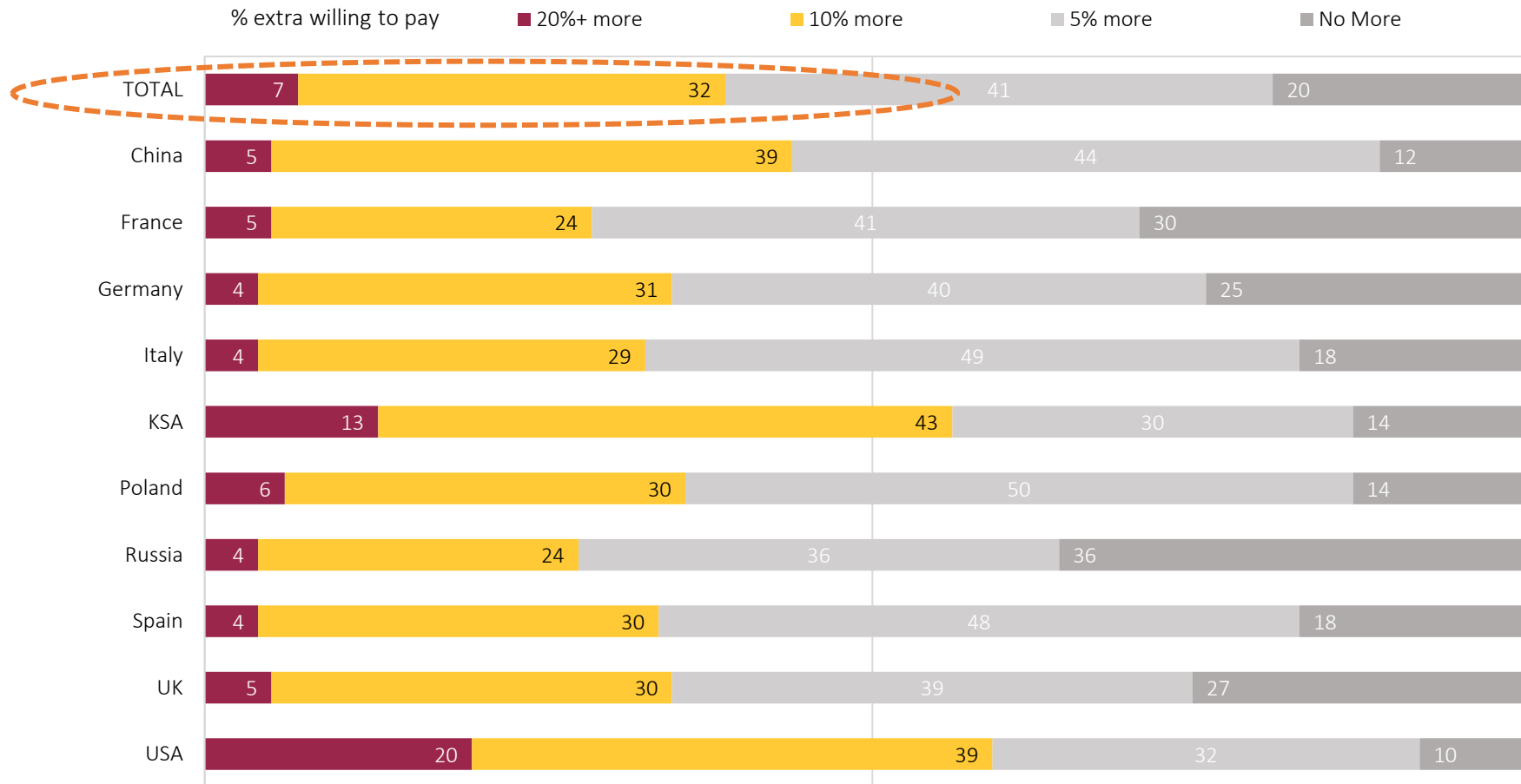
CTV National News: Climate devastation in B.C.





AN OVERWHELMING MAJORITY OF TRAVEL CONSUMERS WOULD BE WILLING TO PAY MORE FOR A RESPONSIBLE AND SUSTAINABLE TOURISM EXPERIENCE, WITH AMERICANS MOST OPEN TO THIS.

WILLINGNESS TO PAY PREMIUM FOR RESPONSIBLE TRAVEL



Base per country: China n=548, France n=333, Germany n=331, Italy n=344, KSA n=407, Poland n=439, Russia n=418, Spain n=320,

UK n=342, USA n=321. Total n=3803

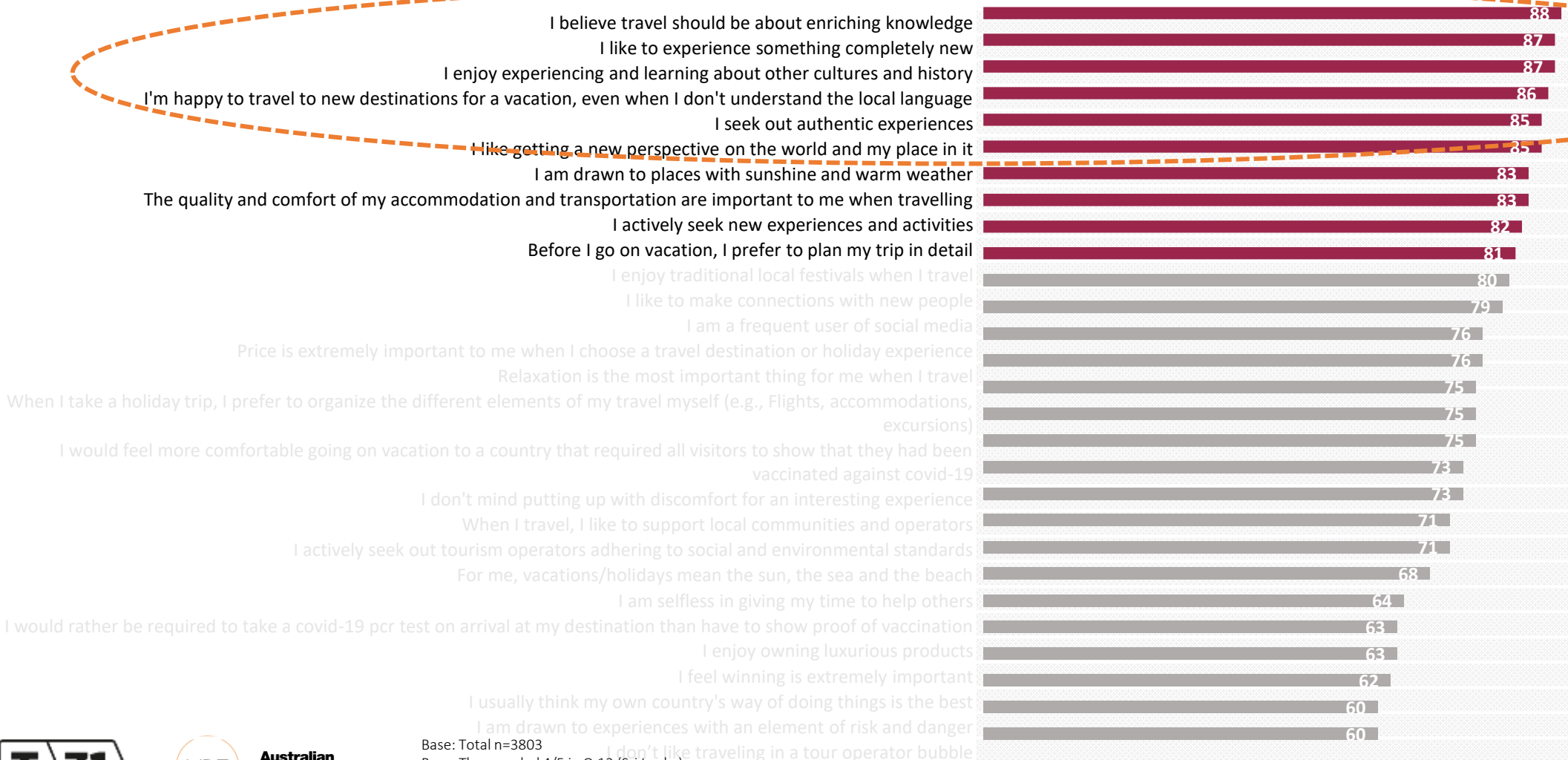
Base: Those coded 4/5 in Q.13 (Sri Lanka)

Q35. How much extra would you be willing to pay for vacation experiences that had been certified by an independent third-party organization as being environmentally and socially responsible?



IMMERSIVE AND LEARNER TRAVELLERS DOMINATE THE PROFILE OF POTENTIAL TRAVEL CONSUMERS TO SRI LANKA.

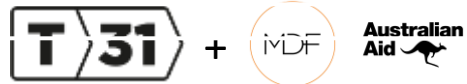
ATTITUDES AND PREFERENCES CONNECTED WITH TRAVEL (% AGREE)



Base: Total n=3803

Base: Those coded 4/5 in Q.13 (Sri Lanka)

Q31. How well do each of the following statements describe you? Move the sliders below to indicate to what extent each quality applies to you

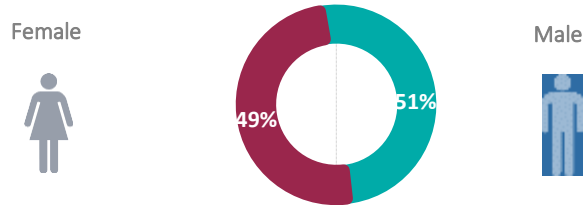


BRIT TRAVELLERS INTERESTED IN SRI LANKA TEND TO BE MIDDLE AGED, HIGHLY EDUCATED WITH ABOVE AVERAGE INCOMES.

DEMOGRAPHIC PROFILE – THOSE INTERESTED IN SRILANKA - UK

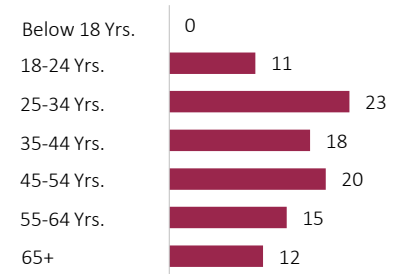


Gender



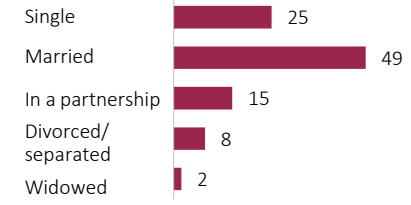
Q2. What is your gender?

Age



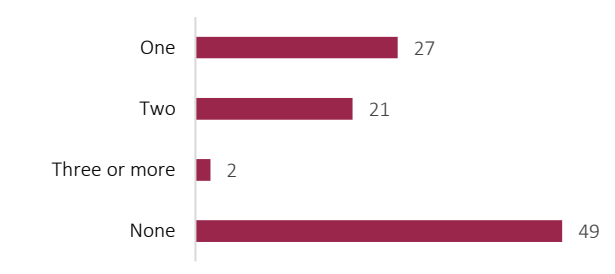
Q1. How old are you?

Relationship Status



Q4. What is your relationship status?

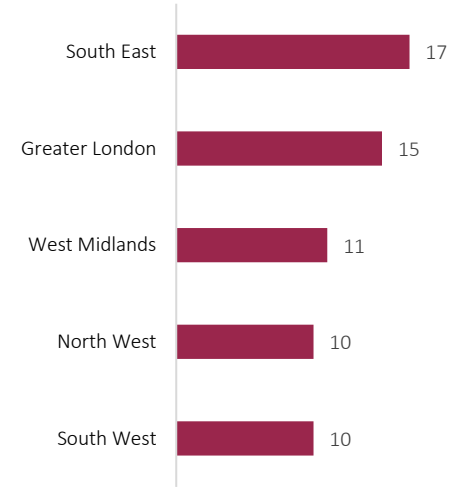
Number of Children Under 18 in Household



Q3. How many children under 18 years of age are living with you in your household?

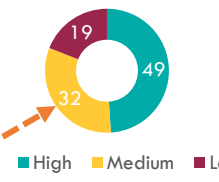


Top 5 Regions



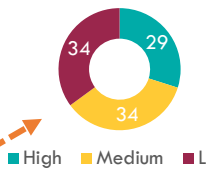
Q5. In which of the following regions do you live?

Level of Education



Q7. What is the highest level of formal education you have completed?

Level of Income



Q8. What is your average annual household income?



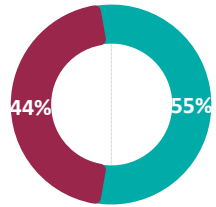
FRENCH TRAVELLERS INTERESTED IN SRI LANKA TEND TO BE YOUNGER, HIGHLY EDUCATED WITH ABOVE AVERAGE INCOMES.

DEMOGRAPHIC PROFILE – THOSE INTERESTED IN SRILANKA - FRANCE



Gender

Female

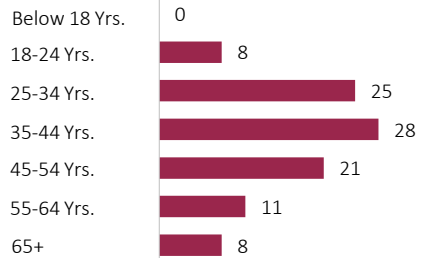


Male



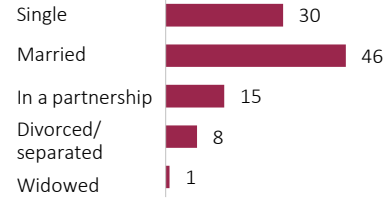
Q2. What is your gender?

Age



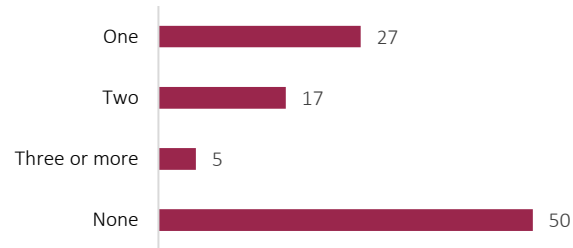
Q1. How old are you?

Relationship Status



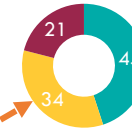
Q4. What is your relationship status?

Number of Children Under 18 in Household



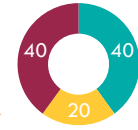
Q3. How many children under 18 years of age are living with you in your household?

Level of Education



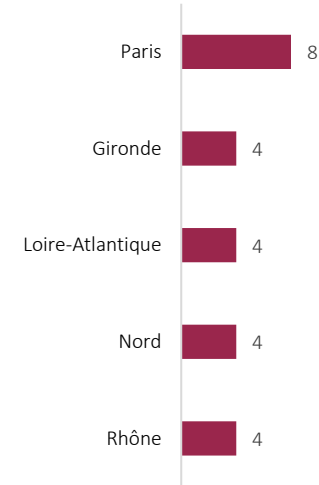
Q7. What is the highest level of formal education you have completed?

Level of Income



Q8. What is your average annual household income?

Top 5 Regions



Q5. In which of the following regions do you live?

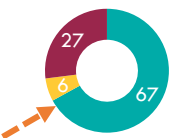


RUSSIAN TRAVELLERS INTERESTED IN SRI LANKA COME FROM ALL AGE GROUPS, BUT ARE DOMINATED BY HIGH EDUCATION AND INCOMES.

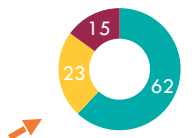
DEMOGRAPHIC PROFILE – THOSE INTERESTED IN SRILANKA - RUSSIA



Level of Education



Level of Income



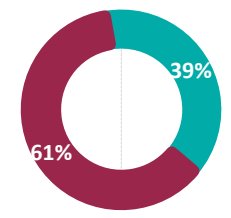
Q7. What is the highest level of formal education you have completed?

Q8. What is your average annual household income?

Top 5 Regions

Gender

Female

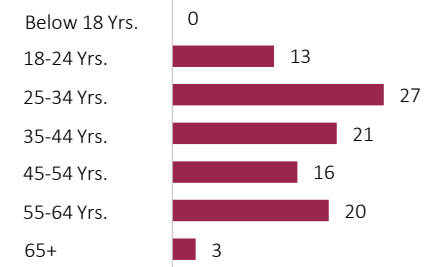


Male



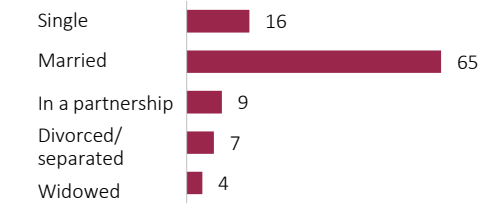
Q2. What is your gender?

Age



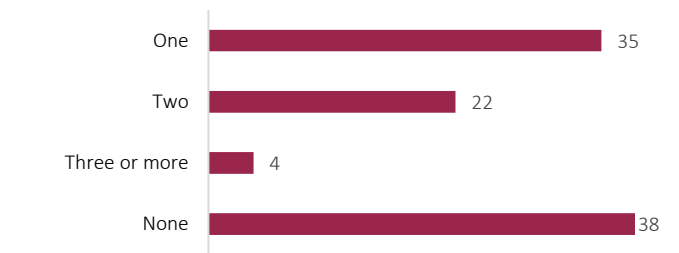
Q1. How old are you?

Relationship Status

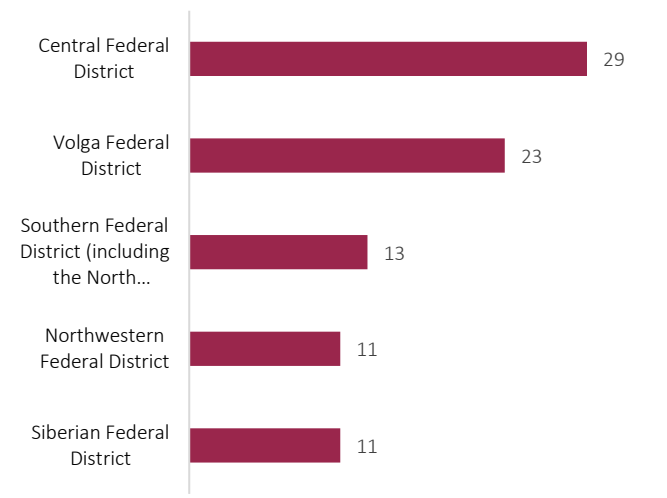


Q4. What is your relationship status?

Number of Children Under 18 in Household



Q3. How many children under 18 years of age are living with you in your household?



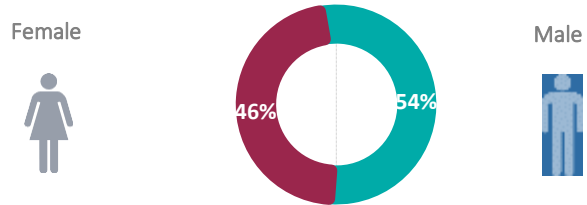
Q5. In which of the following regions do you live?



SAUDI TRAVELLERS INTERESTED IN SRI LANKA ARE THE FAMILY MARKET, WITH HIGH EDUCATION AND INCOMES.

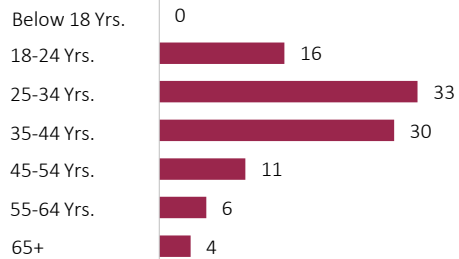
DEMOGRAPHIC PROFILE – THOSE INTERESTED IN SRILANKA - KSA

Gender



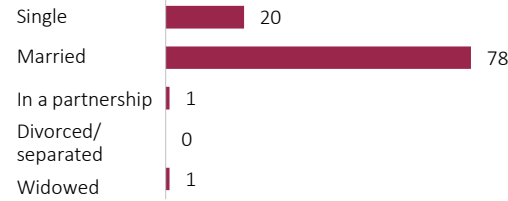
Q2. What is your gender?

Age



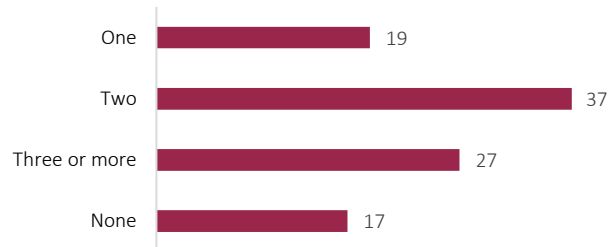
Q1. How old are you?

Relationship Status



Q4. What is your relationship status?

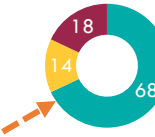
Number of Children Under 18 in Household



Q3. How many children under 18 years of age are living with you in your household?

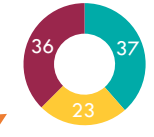


Level of Education



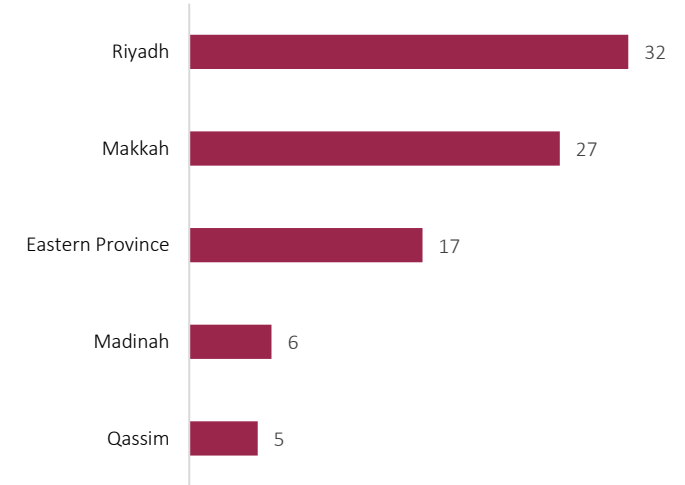
Q7. What is the highest level of formal education you have completed?

Level of Income



Q8. What is your average annual household income?

Top 5 Regions



Q5. In which of the following regions do you live?

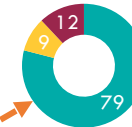


CHINESE TRAVELLERS INTERESTED IN SRI LANKA TEND TO BE MIDDLE AGED, HIGHLY EDUCATED WITH ABOVE AVERAGE INCOMES.

DEMOGRAPHIC PROFILE – THOSE INTERESTED IN SRILANKA - CHINA



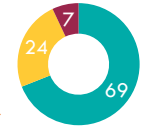
Level of Education



■ High ■ Medium ■ Low

Q7. What is the highest level of formal education you have completed?

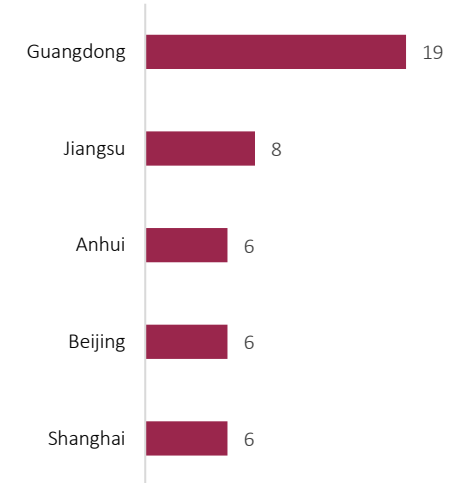
Level of Income



■ High ■ Medium ■ Low

Q8. What is your average annual household income?

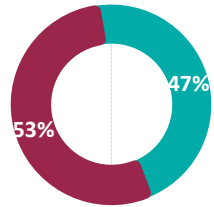
Top 5 Regions



Q5. In which of the following regions do you live?

Gender

Female

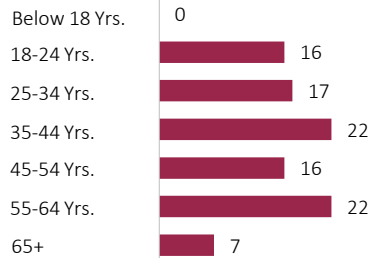


Male



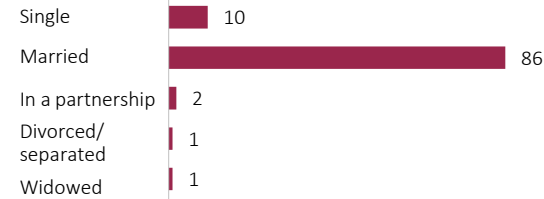
Q2. What is your gender?

Age



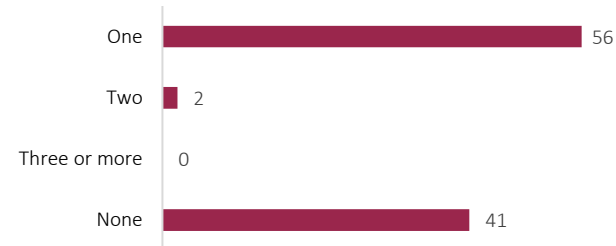
Q1. How old are you?

Relationship Status



Q4. What is your relationship status?

Number of Children Under 18 in Household



Q3. How many children under 18 years of age are living with you in your household?



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