



**The Potential of Agro-Tourism in Sri Lanka: A Case Study of the Tea Industry**

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**A Thesis Submitted in Partial Fulfillment of the Requirements for the Degree of  
Master of Business Administration in Hospitality and Tourism Management  
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### บทคัดย่อ

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วัตถุประสงค์ของการศึกษาเพื่อบ่งชี้ให้เห็นถึงศักยภาพ ปัญหาและสิ่งท้าทายในการพัฒนาการท่องเที่ยว สิ่งอำนวยความสะดวกที่มีอยู่ในปัจจุบัน บริการและผลิตภัณฑ์อื่นและปัจจัยอื่นที่จำเป็นเพื่อนำมาเข้าอยู่ในการท่องเที่ยวและชุมชนสามารถได้ประโยชน์ผ่านภาคส่วนของการท่องเที่ยว

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### **ABSTRACT**

Travel & Tourism is currently one of the world's largest and most important economic activities in the world. It is the leading industry and is the fastest growing economic sector in terms of job creation worldwide. Tourism in Sri Lanka plays an important role in the maintenance of financial stability and is ranked as the 4<sup>th</sup> largest source of foreign exchange earner in the country. Sri Lanka has predominantly been known for its beach, heritage and culture oriented destination and a mass tourism destination. As an alternative to this and the heavy dependence on the traditional markets and the current forms of tourism, this paper investigates the potential to promote tea industry as one of the forms of the tourism product and a new market segment to develop Sri Lanka as a tea-tourism destination by considering the following established brand names "Ceylon Tea", colonial tea history, beautiful tea landscapes, unique climate, etc.

The objectives of this study are to identify the potential, problems and challenges in tea-tourism development, existing facilities, services & other products and other factors needed to incorporate tea into tourism and how community can get benefits through this tea-tourism sector.

The study identifies six stakeholders as the target population of this research and follows a mixed method approach through questionnaires and interviews to acquire the necessary data. The findings indicate that Sri Lanka has tremendous potential and opportunities to attract foreign tourists and domestic tourists to the country through tea-tourism and various suggestions for the development of this sector and other social problems have been identified. The study also identifies mechanisms and strategies on how tea-tourism can be incorporated into the overall tourism strategy through measures such as product development, promotions and formulation of

policy decisions, development of value added products in tea-tourism and more importantly in enhancing benefits to the local community through pro-poor partnerships to alleviate their poverty and the study recommends that selected tea plantation areas be identified where tea-tourism could be developed as a pilot project.

**Keywords:** Agro-tourism, Tea, Tea-tourism, Pro-poor tourism, Sri Lanka

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## LIST OF ABBREVIATIONS AND SYMBOLS

|                   |  |
|-------------------|--|
| <b>AD:</b>        | Agriculture Department   |
| <b>AT:</b>        | Alternative Tourism  |
| <b>BCATA:</b>     | British Columbia Agri-Tourism Alliance                                   |
| <b>BIA:</b>       | Bandaranaike International Airport                                       |
| <b>CBSL:</b>      | Central Bank of Sri Lanka  |
| <b>CD:</b>        | Compact Disk   |
| <b>CEB:</b>       | Ceylon Electricity Board   |
| <b>CEA:</b>       | Central Environmental Authority  |
| <b>CMT:</b>       | Conventional Mass Tourism  |
| <b>CTC:</b>       | Cut, Tear and Curl   |
| <b>FAM tours:</b> | Familiarization tours  |
| <b>GCE (O/L):</b> | General Certificate of Education - Ordinary Level                        |
| <b>GDP:</b>       | Gross Domestic Products  |
| <b>IUCN:</b>      | International Union for the Conservation of Nature and Natural Resources |
| <b>MICE:</b>      | Meetings, Incentives, Conventions and Exhibitions                        |
| <b>NIPM:</b>      | National Institute of Plantation Management                              |
| <b>Mn.:</b>       | Million  |
| <b>MOP:</b>       | Ministry of Plantation Industries  |
| <b>MOT:</b>       | Ministry of Tourism  |
| <b>NGOs:</b>      | None Government Organizations  |
| <b>NTO:</b>       | National Tourism Organization  |
| <b>OAS:</b>       | Organization of America States   |
| <b>PA:</b>        | Planters' Association  |
| <b>PC:</b>        | Plantation Companies   |
| <b>PPTO:</b>      | Pro Poor Tourism Organization  |

|               |  |
|---------------|--|
| <b>PRC:</b>   | Provincial Council   |
| <b>RDA</b>    | Road Development Authority   |
| <b>SD:</b>    | Standard Deviation   |
| <b>SLTDA:</b> | Sri Lanka Tourism Development Authority (former Sri Lanka Tourist Board) |

#### **LIST OF ABBREVIATIONS AND SYMBOLS (CONTINUED)**

|                    |  |
|--------------------|--|
| <b>SIT:</b>        | Special Interest Tourism                                 |
| <b>SL:</b>         | Sri Lanka  |
| <b>SLRs:</b>       | Sri Lankan Rupees  |
| <b>SLTB:</b>       | Sri Lanka Tourist Board                                  |
| <b>SWOT:</b>       | Strength, Weaknesses, Opportunity and Threats            |
| <b>TRBMO:</b>      | Tourism Resource Base Managing Organizations             |
| <b>TSHDA</b>       | : Tea Small Holders Development Authority                |
| <b>TRI:</b>        | Tea Research Institute                                   |
| <b>US\$:</b>       | United States Dollars                                    |
| <b>UNCTAD:</b>     | United Nations Conference on Trade and Development       |
| <b>UN:</b>         | United Nations   |
| <b>UNCED:</b>      | United Nations Conference on Environment and Development |
| <b>VFR:</b>        | Visiting Friends and Relatives                           |
| <b>WB:</b>         | Water Board  |
| <b>WCED:</b>       | World Commission on Environment and Development          |
| <b>WTO/UNWTO :</b> | World Tourism Organization                               |
| <b>WTTC:</b>       | World Travel and Tourism Council                         |

# CHAPTER 1

## INTRODUCTION

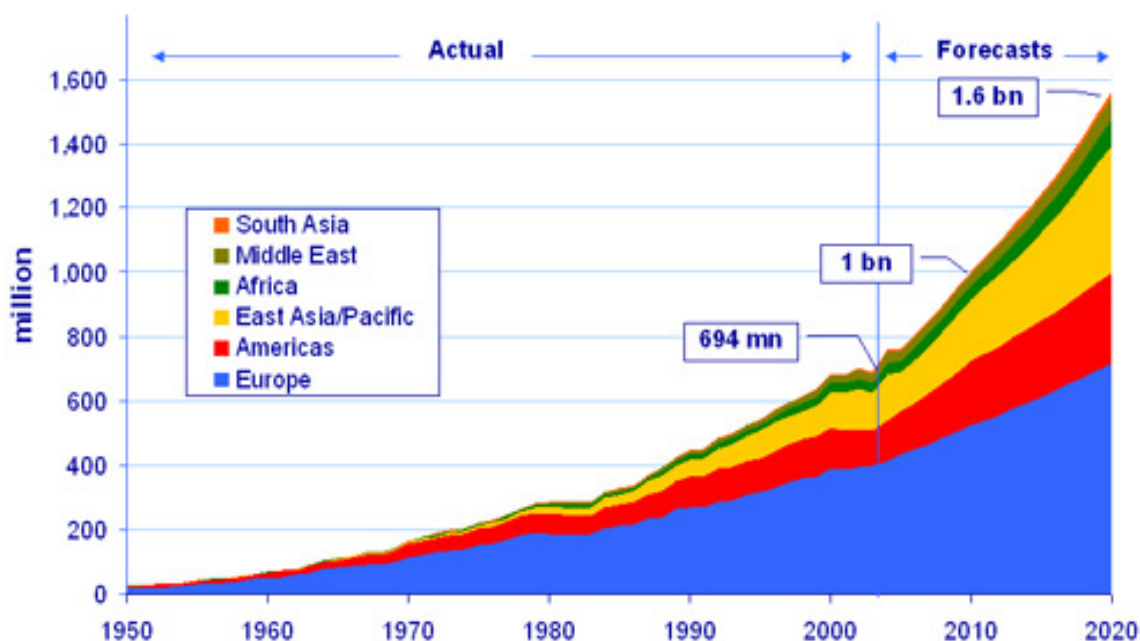
### 1.1 Statement of the Problem

Travel & Tourism is currently one of the world's largest and most important economic activities in the world. It is the leading industry in many countries, as well as the fastest growing economic sector in terms of job creation world wide (World Economic Forum, 2007). The economic significance and potential of Travel & Tourism is particularly prominent in the developing world. In fact, according to the World Travel & Tourism Council (WTTC), most new jobs in developing economies are created in the tourism industry. In 2006, the sector generated 10.3% of world gross domestic product (GDP), providing 234 million jobs, or 8.2% of world employment (World Economic Forum, 2007). The international tourism receipts totalled US\$ 735 billion or US\$ 2 billion a day in 2006. The percentage of the world GDP and the job creation in the Travel & Tourism industry have been forecasted as 11.7% and 255 million respectively in 2020 (WTTC, 1999).

The rising economic importance of the industry has been fuelled by the large and growing number of international travellers. According to the UNWTO, the number of international arrivals grew from 25 million in 1950 to 842 million in 2006, corresponding to an average annual growth rate of 6.5% and which is predicted to be at one billion in 2010 and 1.6 billion in 2020 (WTO, 2003 & 2006). Of these worldwide arrivals in 2020, 1.2 billion will be intraregional and 378 million will be long-haul travellers. Further the UNWTO has indicated that the global demand patterns will be changing from Europe to Asia and the Pacific region by 2020 (WTO, 1997). In addition, Travel & Tourism helps diversify economic activity and enables the creation of wealth and jobs in rural areas (World Economic Forum, 2007).

**Table 1.1** World Tourism Forecasts: 2010-2020

|                         | <b>Base year in Million</b> | <b>Forecasts in Million</b> |             | <b>Market Share (%)</b> |             | <b>Average annual growth rate (%)</b> |
|-------------------------|-----------------------------|-----------------------------|-------------|-------------------------|-------------|---------------------------------------|
| <b>Year</b>             | <b>1995</b>                 | <b>2010</b>                 | <b>2020</b> | <b>1995</b>             | <b>2020</b> | <b>1995-2020</b>                      |
| World                   | 565                         | 1006                        | 1561        | 100                     | 100         | 4.1                                   |
| Africa                  | 20                          | 47                          | 77          | 3.6                     | 5.0         | 5.5                                   |
| Americas                | 110                         | 190                         | 282         | 19.3                    | 18.1        | 3.8                                   |
| East Asia & the Pacific | 81                          | 195                         | 397         | 14.4                    | 25.4        | 6.5                                   |

**Figure 1.1** World Tourism Arrivals and Forecasts

|             |     |     |     |      |      |     |
|-------------|-----|-----|-----|------|------|-----|
| Europe      | 336 | 527 | 717 | 59.8 | 45.9 | 3.1 |
| Middle East | 14  | 36  | 69  | 2.2  | 4.4  | 6.7 |
| South Asia  | 4   | 11  | 19  | 0.7  | 1.2  | 6.2 |

1,600

Actu

Foreca  
1.6

Source: UNWTO, 2006

| Purpose of Visit                 | 2000  | 2002  | 2003  | 2004  | Share 2000 | Share 2004 | Average Annual Growth (%) |
|----------------------------------|-------|-------|-------|-------|------------|------------|---------------------------|
| World                            | 686.7 | 706.4 | 693.2 | 763.9 | 100        | 100        | 2.7                       |
| Leisure, recreation and holidays | 351.5 | 356.3 | 349.8 | 383.1 | 51.2       | 50.1       | 2.2                       |
| Business & professionals         | 112.1 | 112.9 | 111.2 | 119.3 | 16.3       | 15.6       | 1.6                       |
| VFR, health, religious & other   | 164   | 171.2 | 176.1 | 197.7 | 23.9       | 25.9       | 4.8                       |
| Not classified                   | 59    | 61    | 56.1  | 63.8  | 8.6        | 8.3        |                           |

Source: UNWTO, 2006  
 TABLE 1.2 World Tourism Arrivals by Purpose of Visit

Source: UNWTO, 2006

Table 1.2 indicated that 50.1% of the world tourism arrivals from the purpose of visit for leisure, recreation and holidays of the 2004 arrivals with the 2.2% average annual growth rate for this sector.

Although Europe recorded highest market share (Table 1.1), South Asia is recorded highest average annual growth rate more than Europe at 6.2%. World Tourism Organization (WTO, 2004) forecasted that the international visitor arrivals will grow approximately five times more rapidly in developing countries, especially in the Asia & the Pacific.

**Table 1.3** International Tourism Receipts: 2004 - 2005

| Region                        | Tourism Receipts<br>US\$ billion |              | Share<br>(%)<br>2005<br>of<br>Total<br>World | Receipt<br>per Arrival<br><br>US\$ |
|-------------------------------|----------------------------------|--------------|--|------------------------------------|
|                               | 2004                             | 2005         |  |                                    |
| <b>World</b>                  | <b>633</b>                       | <b>680</b>   | <b>100</b>                                   | <b>840</b>                         |
| <b>Europe</b>                 | <b>328.5</b>                     | <b>348.2</b> | <b>51.2</b>                                  | <b>790</b>                         |
| Northern Europe               | 48.9                             | 53.8         | 7.9  | 1,020                              |
| Western Europe                | 117.6                            | 121.9        | 17.9   | 850                                |
| Central/Eastern Europe        | 29                               | 32.3         | 4.7  | 370                                |
| Southern/Mediter.Europe       | 133                              | 140.2        | 20.6   | 890                                |
| <b>Asia &amp; the Pacific</b> | <b>127.8</b>                     | <b>138.6</b> | <b>20.4</b>                                  | <b>890</b>                         |
| North-East Asia               | 64                               | 70.8         | 10.4   | 810                                |
| South-East Asia               | 32.2                             | 33.4         | 4.9  | 680                                |
| Oceania                       | 22.9                             | 24.5         | 3.6  | 2,330                              |
| South Asia                    | 8.7                              | 9.8          | 1.4  | 1,220                              |
| <b>Americas</b>               | <b>132</b>                       | <b>144.6</b> | <b>21.2</b>                                  | <b>1,080</b>                       |
| North America                 | 98.2                             | 107.1        | 15.7   | 1,190                              |
| Caribbean                     | 19.2                             | 20.4         | 3  | 1,080                              |
| Central America               | 4                                | 4.6          | 0.7  | 700                                |
| South America                 | 10.6                             | 12.5         | 1.8  | 690                                |
| <b>Africa</b>                 | <b>19.2</b>                      | <b>21.5</b>  | <b>3.2</b>                                   | <b>590</b>                         |
| North Africa                  | 6.1                              | 7            | 1  | 510                                |
| Subsaharan Africa             | 13.1                             | 14.5         | 2.1  | 630                                |
| <b>Middle East</b>            | <b>25.5</b>                      | <b>27.6</b>  | <b>4</b>                                     | <b>710</b>                         |

**Source:** UNWTO, 2006

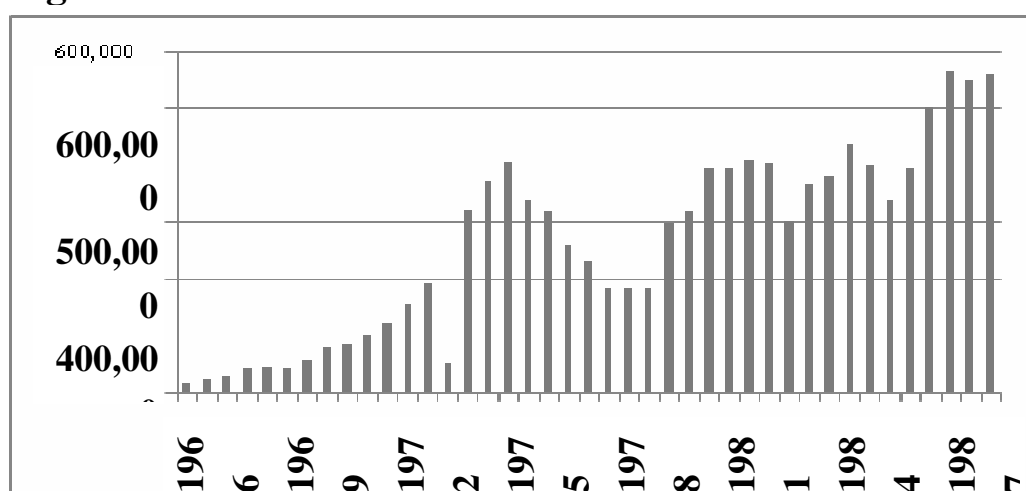
Table 1.3 shows that 20.4% of the world tourism receipts were dominated by the Asia & the Pacific region and it indicated that the world second highest receipt per arrival was recorded by this region (US\$ 890) as compared to Europe at US\$ 790.



The tourism for Sri Lanka plays an important role in the maintenance of financial stability and ranked as a 4<sup>th</sup> largest source of foreign exchange earner in the country (CBSL, 2006). Tourist arrivals to Sri Lanka from 18,969 in 1966 increased to 559,603 in 2007 and able to contributed 3.8% of the total foreign exchanged earnings to the economy in 2006 by creating 55,649 and 77,909 direct and in direct employments respectively in the country. A Research conducted in Sri Lanka indicated that ratio of the direct employments to indirect employment is 1:1.4 and which resulting that there will be 140 employments created in the supply sector when 100 employments created in the tourism sector (SLTB, 2006 a).

Irrespective to all efforts, industry is struggling to sustain with unstable security situation in the country. Thus, tourism growth both by numbers and foreign exchange earnings has experienced fluctuations and slow growth in 1990s and 2000s. Since 2001, government recognized tourism as a one of the foremost industries in its economic development plan (Task Force, 2000).

**Figure 1.2** International Tourist Arrivals to Sri Lanka: 1966 -



**Source:** SLTB, 2006

Figure 1.2 indicates the fluctuations of tourist arrivals to Sri Lanka due to many reasons in the country i.e.

unstable security situation, natural disasters, etc. as well as the global changes occurred in the world economy over the period.

**Table 1.4** Tourist Arrivals to Sri Lanka by Purpose of Visit

| Purpose of Visit/Year              | Tourist Arrivals (%) |            |            |
|------------------------------------|----------------------|------------|------------|
|                                    | 1998                 | 2002       | 2006       |
| Pleasure                           | 93.1                 | 85.4       | 67.4       |
| Business                           | 4.1                  | 9.4        | 17.8       |
| Visiting Friends & Relatives (VFR) | 1.1                  | 2.0        | 7.6        |
| Religious & Culture                | 0.7                  | 1.0        | 1.7        |
| Others                             | 1.0                  | 2.2        | 5.5        |
| <b>Total</b>                       | <b>100</b>           | <b>100</b> | <b>100</b> |

**Source:** SLTB, 2006

Given this scenario in the tourism industry, Sri Lanka is predominantly known a beach destination for mass tourism and has so far been conducted in such a manner by the major foreign tour operators who have been able to achieve discounts in situation of instability and security concerns by operating larger groups organized (Buultjens, 2003).

Still Sri Lanka is popular as a beach, heritage and culture oriented destination (see Table 1.4). However, similar offers are become common in most tropical courtiers, resulting in diminishing competitive advantage for Sri Lanka. Recent development in tourist generating markets such as India, China, Korea, Maldives, Middle East, etc. suggests that tourism future is not going to depend only on traditional products (WTO, 2002).

When a destination is highly dependent on mass tourism, tourism demand fluctuations could be expected. On the

other hand, one can not assure that other forms of tourism (alternative tourism) are not sensitive to security aspect. However, in comparative sense between mass tourism and alternative tourism, the first category is more sensitive to any major problem including uncertainty in a destination (Buultjens, 2003).

And also, when mass tourism is rapidly growing, environmental protection has become a major issue in the recent years. In general, most people realize that the planet has quite limited resources and therefore attempt to identify various methods which will enable its preservation. “Despite the recognition of the long history of the environment problem, it should be noted that until the beginning of the twentieth century, in general only relatively modest environmental changes were taking the prevailing technological and economic was unable to alter environmental condition on earth dramatically” (Nijkamp, 1992, p. 37).

The environment is probably one of the most important contributors to the desirability and attractiveness of a destination. Scenic site, amenable climates and unique landscape features have an important influence in tourism development and the spatial distribution of tourist movements. Consequently, sustainable development can be defined as designing for a development that meets the needs of the present without compromising the ability of future generations to meet their own needs, required in order to preserve the environment as an asset for the tourism industry. However tourism has been responsible for a great number of environmental problems. The major problems arise because the environment (at least in the short term) is a zero priced public good and as with any zero-priced good, is subject to excess demand and over-utilization. This over-utilization of the natural resources, especially during the peak periods of tourist activities as well as often ill planned tourism development, have provided a number of examples

where tourism is conflict with the environment (Coccosis & Parpairis, 1995).

As a result of environmental consequences, a great number of alternative forms of tourism have been developed in the last decade. Various names are utilized to demonstrate the typologies of the environmentally conscious tourist. 'Green', 'Soft', 'Eco', 'Sustainable', 'Responsible', or 'Alternative' tourism are some of the terms for to describe the new tourism. This new trend, prefer the places which are not destroyed by the "mass of tourists" (Ozgen, 2003).

Continuing expansion of mass tourism is one of the contradictions of the dominant western environmental paradigm and its associated advocacy platform. The contradictory element of in this mode of tourism, specifically, is embodied in Butler's assertion (Butler, 1980) that the deterioration of the destination's physical and socio-cultural environment is the logical culmination of an unregulated resort cycle sequence (Weaver, 2001).

Understanding the trend and interest of the future market, most of the countries in Asia has already done researches and initiated formulation of tourism products in accordance to the trend. Those studies reveal that future tourism would mainly be nature friendly, activity based, educational oriented and focus on studying admiring nature etc. In other words the three "E" concepts i.e. Education, Excitement and Entertainment, is going to be the highlight in future tourism (Nam Ng, 2000).

As an alternative to the above issues, Sri Lanka has ample opportunity to attract more tourists from niche market such as nature, culture and adventure tourism by considering the tourism resources that the country have.

By considering the situation in the Tourism industry in Sri Lanka, the following measures have been taken by the Ministry of Tourism and Sri Lanka Tourism Board (SLTB) (at present Sri Lanka Tourism Development Authority (SLTDA))

to promote niche markets such as rural tourism, ecotourism, adventure and water sports in the country (SLTB, 2000, 2001 & 2001). Some of those initiatives are listed below:

- 1) Introduction of new theme for all Sri Lanka Tourism Promotions “Beyond Beaches”, Nature, Culture and Adventure”.
- 2) Diversify the tourism demand by tapping the other market segments such as “Special Interest” including adventure and MICE travel.
- 3) Identifies that the tourism industry has strong linkage with many other sectors such as transportation, agriculture, fisheries and handicraft, etc.
- 4) Completion of Ecotourism study with National Ecotourism Policy, Regulations, Guidelines and Strategies for Sri Lanka in 2003.
- 5) Conduct of Community awareness to minimize tourism negative impacts and to transform negative attitude of the community towards tourism.
- 6) Training of Ecotourism Guides selected from National Tourist Guides to serve predominantly in the ecotourism market.
- 7) Production of: “Sri Lanka Nature” brochures and promotional Compact Disk (CD) with ecotourism products.
- 8) Incorporation of Eco and Adventure activities in future mega tourism projects such as Dedduwa and Kalpitiya has been initiated by the Sri Lanka Tourist Board.
- 9) Strengthening the Tourism sector linkages with the other production sectors of the national economy to maximize the indirect and induced

effects of tourism through the operation of the multiplier principle.

(SLTB, 2003 a, 2004, 2005)

Therefore, an alternative to the above issues, this research investigates the potential that the Sri Lanka has, to promote tea industry in the agro-tourism, one of the form of alternative tourism developing in the world as a new market segment by considering the ample resources, since Sri Lanka is predominantly agricultural country having tea, rubber, coconut, vegetables, fruits & etc. over many years with the suitable climate for agriculture.

## **1.2 Related Literature**

### **1.2.1 Concept of Sustainability**

The concept of sustainable and sustainability is initially highlighted by the International Union for the Conservation of Natural Resources at World Conservation Strategy in 1980 (IUCN, 1980).

The “Sustainability Development” became after the first United Nations Environmental conference known as Earth Summit at Rio de Janeiro in June 1992.

The “Sustainability Development” concept was popularised in the late 1980s with the publication of *Our Common Future* by the World Commission on Environment and Development and has been defined as “development that meets the needs of the present without compromising the ability of future generations to meet their own needs” (WCED, 1987).

This concept has been applied by the different kinds of organizations and industries by developing their own definitions based on the UN idea and out of them some of the ideas can be stated as follows.

“Sustainability Development” implies economic growth together with the protection of environmental quality,

each reinforcing the other. The essence of this form of development is a stable relationship between human activities and the natural world, which does not diminish the prospects for future generations to enjoy a quality of life at least as good as our own. Many observers believe that participatory democracy, un dominated by vested interests, is a prerequisite for achieving sustainable development (Mintzer, 1992).

The sustainability goals stated by Organization of American States (OAS) are:

1. To develop greater awareness and understanding of the significant contribution that tourism can make to environment and economy
2. To promote equity in development
3. To improve the quality of life of the host community
4. To provide high quality experience for he visitor
5. To maintain the equality of the environment on which foregoing objectives depend.

(Organization of American States, 1997)

### **1.2.1.1 Sustainable Tourism**

“Sustainability Development” may be regarded most basically as the application of the sustainable development idea to the tourism sector. That is, tourism development that meets the needs of the preset without compromising the ability of future generations to meet their own needs. Essentially, sustainable tourism involves the minimization of negative impacts and the maximization of positive impacts. Yet, while sustainable tourism may therefore be regarded as a form of sustainable development (i.e. development as a goal), there is not as direct a relationship between the two terms as might be expected (UNCED, 1992).

It applying the sustainable concept into tourism and UN define the term “Sustainable Tourism” as:

‘the tourism industry must be profitable and environmentally sustainable if it is to provide long term benefits, but this will not achieved without a new and different approach to industry planning and development’ (UN, 1999).

WTO has defined the term “Sustainable Tourism” as:

“Sustainable Tourism” meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social, and aesthetic needs can be fulfilled while maintain cultural integrity, essential ecological process, biological diversity and life support systems (WTO, 2001).

The term “Sustainability Development” usually denotes the application of the more general concept of sustainable tourism development as a specific economic sector.

Sustainable Tourism sees tourism within destination areas as a triangular relationship between host areas and their habitats and peoples, holidaymakers and the tourism industry. Sustainable tourism aims to reconcile the tension between the three partners in the triangle, and keep the equilibrium in the long term. Sustainable tourism aims to minimize environmental and cultural damage, optimize visitor satisfaction, and minimize long-term economic growth in the region. It is way of obtaining a balance between the growth potential of tourism and the conservation needs of the environment (English Tourist Board, 1991; Hawkes & Williams, 1993; Bramwell & Lane, 1993).

### **1.2.2 Pro-Poor Tourism**

Pro-Poor Tourism (PPT) is a new agenda has been enthusiastically embraced developing world and international



agencies such as WTO, UNCTAD and the World Bank. Pro-Poor Tourism is ‘tourism that results in increased net benefits for poor people’. PPT is not a tourism product or some nice market segment but it is an approach to tourism development and management to create maximum benefits to the poor people while enhancing the linkages between tourism business and poor people. As a result tourism creates an environment to increase the poverty reduction hence poor people are able to participate more effectively in product development process. It is necessary to be considered to have a links with many different types of ‘the poor’: staff, neighbouring communities, land-holders, operators of micro tourism business, other users of tourism infrastructure and resources, etc. There are many types of pro-poor strategies, ranging from increasing local level employment to building mechanisms for consultations. In the tourism business any type company can be involved with the pro-poor tourism, but ultimately net benefits should be go to the poor people nevertheless the type of the company.

### **Strategies for Pro-Poor Tourism**

Strategies for pro-poor tourism can be divided into following three types:

#### **(1) Economic Benefits:**

1. Expansion of employment and local wages: via commitments to local jobs, training up locals for employment
2. Expansion business opportunities for the poor. These may be business/entrepreneurs that sell inputs such as food, fuel, or building materials to tourism operations. Or they

may be businesses that offer products directly to tourists, such as guiding, crafts, tea shops, etc. Support can vary from marketing and technical support (e.g. by nearby mainstream operators), to shifts in procurement strategy, or direct financial and training inputs.

3. Development of collective community income. This may be from equity dividends, lease fee, revenue share, or donations, usually established in partnership with tourism operators or government institutions.

## **(2) Other Livelihood Benefits e.g. Physical, Social or Cultural**

1. Capacity building, training and empowerment
2. Mitigation of the environmental impact of tourism on the poor and management of competing demands for access to natural resources between tourism and local people.
3. Address competing use of natural resources
4. Improved social and cultural impacts of tourism
5. Improved access to services and infrastructure: health care, radio access, security, water supply, transport.

## **(3) Policy, Process and Participation**

1. More supportive policy and planning framework that enables participation by the poor.
2. Increased participation by the poor in decision-making: i.e. ensuring that local people are consulted and have a say in tourism decision making by government and the private sector.
3. Pro-poor partnerships with the private sector.
4. At the minimum: increased flow of information and communication: meetings, reports back, sharing news and plans (PPTO, 2008).

### 1.2.3 Agro-tourism

The term Agro-tourism is referred to as “Agri-tourism”, “agriculture tourism”, etc. in the frame of “Special Interest Tourists (SIT)” by different authors. Agro-tourism, is also called eco-tourism or rural tourism, and is adopted by many countries around the world as one of major rural policies to generate rural viability (Lee & Nam, 2006).

The definition of agro-tourism utilized in this study is that of Weaver and Fennell (1997, p. 357): “rural enterprises which incorporate both a working farm environment and a commercial tourism component”.

Examples of agro-tourism may include farm stays, bed and breakfasts, pick-your-own produce, agricultural festivals, and farm tours for children, or hay rides (Clark, 1996, 1999).

According to the British Columbia agri-tourism Alliance (BCATA)’s definition for agro-tourism:

“Travel that combines agricultural or rural settings and products within a tourism experience. It includes providing visitors with a broad spectrum of agriculturally-based experiences ranging from fruit and vegetable stand shopping (direct farm marketing) to winery, orchard, garden and alpaca tours, from farm-based bed and breakfast accommodation, to participation in harvest festivals, farmer's markets and cattle drives”.

Agro-tourism, also called eco-tourism or rural tourism, is adopted by many countries around the world as one of major rural policies to generate rural viability and is composite of agricultural products, eco-products, and cultural products, which bears such diverse functions as economic, social, educational, environmental, recreational, therapeutic, etc. In fact, agro-tourism enables to rediscover the values of rural resources disregarded in the modernization process of a national economy, giving insights to both farmers and policymakers to

adopt a wider perspective than the hitherto agricultural product oriented mentality of rural development (Ohe, 2006).

The boundary and application of agro-tourism are quite diverse; however, it generally encompasses agricultural production, lifestyle, and rural environment to accommodate people in both urban and rural areas. It is also has been extensively studies from the viewpoint of farm-based rural business for both developed and developing countries (Kannan and Singh, 2006; Liu, 2006; Ohe, 2006; Page and Getz, 1997).

This new market segment is becoming alternative to the mass tourism as a Special Interest Tourism (SIT).

Alternative agriculture is defined as small-scale, low-capital agriculture that uses little or no herbicides, pesticides, fertilizers and other chemicals, limits the use of mechanization, and encourages diversity of crops (as opposed to mass production monocrop agriculture)(Meares,1997). Types of alternative agriculture include organic, regenerative, sustainable, eco-agriculture, permaculture, biodynamics, natural farming and low-input agriculture (Chiappe & Flora, 1998).

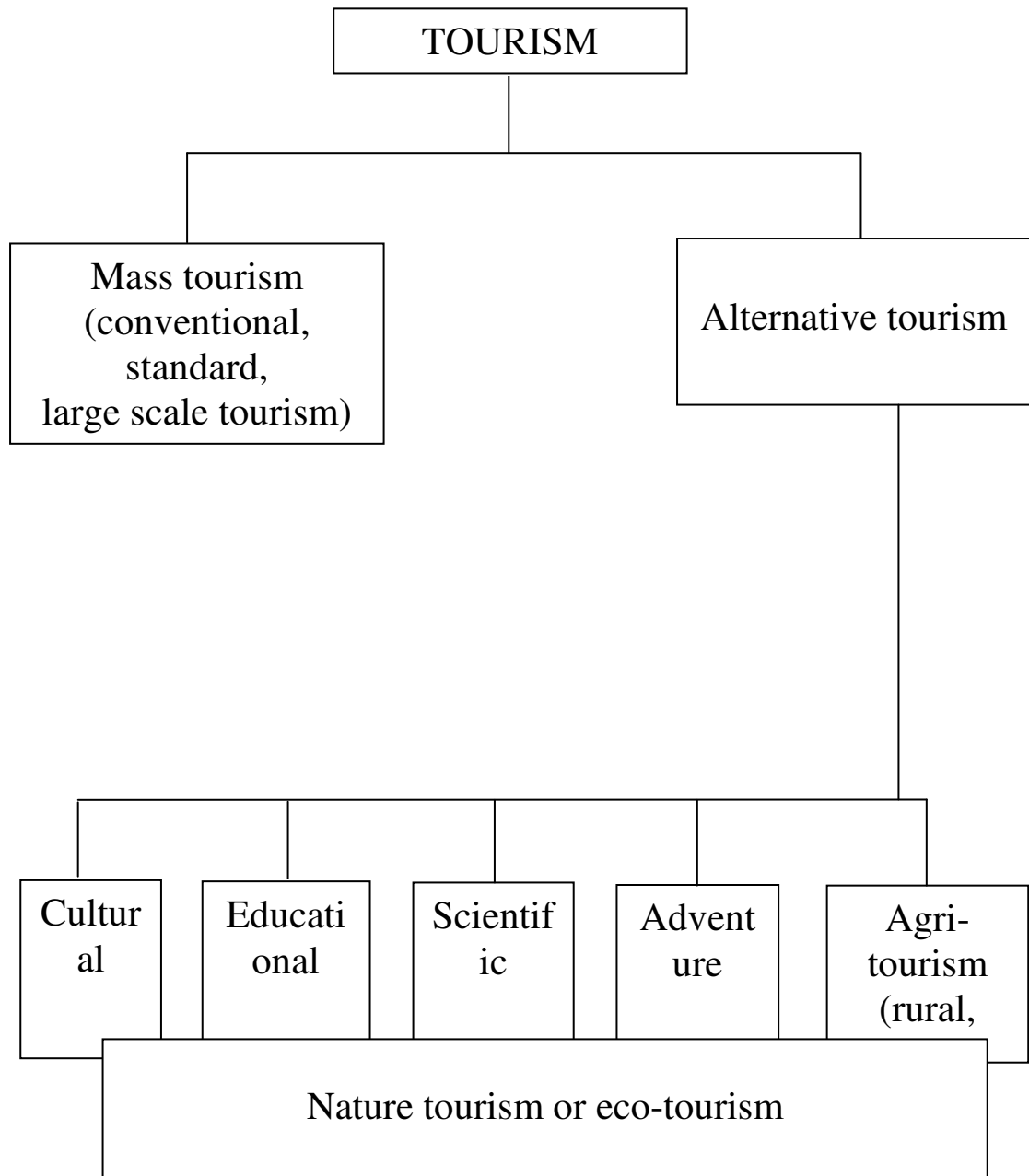
Farm tourism (agritourism or agrotourism) is a sub-sector of rural tourism (Coomber L. & Lim C., 2004). The term 'farm tourism' is used in some countries with agro-tourism or agri-tourism.

Roberts and Hall (2001), agro-tourism is one of the five categories of rural tourism, the other being ecotourism, cultural, adventure and activity tourism. The border sector of rural tourism can be defined as tourism activity in rural areas and has different meaning in different countries.

Hill et al. (1996, p. 50) define rural tourism as 'the natural life tourism, through which the customer may access the natural environment as opposed to commercially developed tourist activities and locations. Rural tourism has been initiated to satisfy tourists who are seeking, healthy, active, relaxing and culturally valid experiences to escape urban crowds and stressful work places (Coomber L. & Lim C., 2004).

Mieczkowski (1995) does identify agro-tourism as a form of alternative tourism (AT) (see Figure 1.3). Figure 1.3, identify alternative tourism as a tourism type but only in its relation as one of two broad categories along a spectrum of tourism type. The first is Conventional Mass Tourism (CMT), which has prevailed on the market for some time. The alternative tourism is the second category as per the Figure 1.3, a flexible generic category that contains a multiplicity of various forms that have one feature in common - they are alternative to CMT. Therefore, they are not associated with mass large-scale tourism but are essentially small scale, low density, dispersed in non-urban areas, and they cater to special interests groups of people with mainly above average education with relatively high disposable income. Furthermore, Mieczkowski (1995) finds that, agri-tourism aligned with nature-based tourism as well (see Figure 1.3).

**Figure 1.3** The Alternative Tourism



**Source:** The Alternative Tourism (after Mieczkowski, 1995:459)

Whatever the label agro-tourism has, most often it refers to 'rural tourism conducted on working forms were the working environment forms part of the product from the perspective of consumer (Roberts & Hall, 2001).

Agro-tourism can include:

1. Accommodation, Farm visitor centres, galleries & museums
2. Farm shop for produce & crafts
3. Guided walks and far trails
4. Educational visits
5. Farm activities, such as mustering, fruit picking, horse riding, fishing, tea plucking, tea tasting, etc.
6. Food & beverage outlets

A common feature relevant to all of the above is management by the owner/farmer with help from the family household. Tourism is usually secondary to the farm activities.

Considerable attention has been given to the food tourism & wine tourism in recent years. When visit to farms, and farm tours are part of the experience, these forms of tourism are best categorized as sub-sectors as farm tourism. The tangible and intangible elements of the farm landscape attract visitors and influence their level of satisfaction (Coomber L. & Lim C., 2004).

Hall et al. (2003) use the terms ‘winescapes’ and ‘foodscapes’ from wine-tourism and food tourism respectively. Author suggests the term focusing tea-tourism as ‘teascapes’.

### **1.2.3.1 Benefits of Agro-tourism**

There are advantages for farm operators, rural communities, and the tourism industry as a whole.

Agro-tourism advantages for farm operators include:

1. Developing new consumer market niches;
2. Increasing awareness of local agricultural products;
3. Creating greater appreciation of the importance of maintaining agricultural land uses;

4. Providing farm family members with on-site employment opportunities
5. Strengthening the long-term sustainability for farm businesses
6. For rural communities and regions, agro-tourism can be a vehicle for diversifying and stabilising rural economies by:
  1. Creating jobs and increasing community income;
  2. Providing a broader market base for local businesses; and
  3. Attracting other businesses and small industries.

From a tourism viewpoint, agro-tourism is a means of diversifying the mix of tourism products and services available to visitors and uniquely positioning rural regions and communities for tourism markets.

### **1.2.3.2 Overview of Global Agro-tourism Industry**

The notion agro-tourism appeared at the end of the twentieth century. Agro-tourism is a term introduced by representatives of those agricultural farms, which deal with tourism. That notion spread over all activities connected with not only tourists but also holiday-makers in general. For that reason the notion is understood differently by tourists themselves and by those who deal with tourism. For tourists agro-tourism means all activities of people who are going to learn about agricultural production or rest in a farm environment. There is a fundamental belief in agriculture that agricultural farm is a basic field that delivers tourist service.

Having free workforce, accommodation or cheap food supply it can gain income to the tourism. However, the



practice shows that other subjects are also interested in agricultural activity; while farms, especially those located in the area attractive touristically, narrow their activity to agriculture. The meaning of the nation agriculture changes depending on the geographical region in the world. What is more, the relations between agriculture and rural tourism also change. The difference is a consequence of the role of rural community and agriculture in a given country or region.

Some times where country has some different than agricultural functions, the differentiation between the agro-tourism and rural tourism is crucial. In the areas where farming production is divided and highly specialised and where it is possible to observe the close relations in the rural community, it is advisable to use the term “rural tourism” to agro-tourism. Agro-tourism is the example of the extra-agricultural development of the agricultural farms and rural areas.

Nowadays, this market segment contains wide knowledge in the areas of economy, organisation, marketing and managing.

This market segment is very important for the communities both urban and rural. It can have several functions, such as: income, employment, using free accommodation, activating the rural areas, preserving natural sources and also recreation and education of the urban community. The most common groups of functions are: socio psychology, economics and environmental.

The first one are connected with increasing respect for the rural community, culture promoting and possibilities of introducing the traditional lifestyle of the rural areas. Economical functions deal with stimulation of development of agricultural, horticultural or breeding farms, creating additional sources of income for farms and local governments. Environmental functions deal with protection of natural environment and taking care of the rural one.

The World Tourism Organization estimated that all nature-related forms of tourism and ecotourism now account for 20% of all international travel and that ecotourism is worth US\$ 20 billion a year (WTO, 1998). Beginning the 1990s, ecotourism (together with nature tourism) became the fastest growing sector of the industry, growing at about 20%-30% per year (The Nature Conservancy, 2002).

There is no actual statistics of this overall market size of the agro-tourism market, hence has to consider the size of this market as a size of the eco-tourism, rural tourism market or combination of both since this market segment belongs to eco-tourism or rural tourism. And also there is no actual statistics on the overall size of the eco-tourism or rural tourism market segments. Though there is no market size of the nature tourism market, eco-tourism market or agro-tourism market, various research studies and estimates revealed that the nature tourism market including eco-tourism market is large and growing.

By considering the above, author suggest to consider the size of this agro-tourism market as the same for as nature tourists, since the agro-tourism is a part of the nature tourism point of view.

#### **1.2.4 Overview of Tourism Industry in Sri Lanka**

Even though the Tourism Industry in Sri Lanka plays as a 4<sup>th</sup> Foreign Exchange Earner in the country at present, tourism as an economic indicator in Sri Lanka has no began early. Although in past times pilgrims and other travellers came to Sri Lanka, it was during the British colonial days that a constant flow of travellers developed, linked to the colonial trading relationship. In, particular, this was given an added boos by the fact that in past times pilgrims an other travellers came to

Sri Lanka, it was during the Sri Lanka tourism has long history and it reserved official recognition in Colombo served as a important staging post between Europe and the Orient. Nevertheless, these flows were not developed or tapped as economic resources (Fisher, 1964).

The formal tourism development in Sri Lanka started in 1966 with the establishment of Ceylon Tourist Board (presently call Sri Lanka Tourism Development Authority) under the parliament Act.No.10 in 1966.

After 1966 to at present there were lots of changes have being arose in the tourism industry in Sri Lanka. There were two, ten year Master Plans have been developed by the Sri Lanka Tourist Board for the periods (1967-1976) and (1992-2001).

After formulation of the Tourism Master Plans, Sri Lanka Tourism have been able to achieve more foreign visitors during past period and as a result Sri Lanka were very popular among foreign travellers as a beach destination. Since mid 1980s unfavourable security situation has been affecting on tourism for over two decades. Depending on sensitivity of incidents such as terrorist attack happed during that period resulted on fluctuations on tourism demand. In the meantime, the NTO and industry were taken many initiatives to drive the products range in the country towards culture, nature, hill country, waterspouts, adventure and sports.

Tourism starts to grow again in 2000s after a piece agreement had with the terrorist organization and reached to all time high amounting 566,202 arrival and over 129,000 employment opportunities in 2004. Although the growth expected to be continued to 600,000 in 2005 deterioration of the security situation resulted a sluggish in arrivals and foreign exchange earnings amounting 549,000 and US\$ 362 million with 3% and 13% down turn respectively compare to 2004 (SLTB, 2005).

Sri Lanka is popular as a beach destination from the beginning of the tourism in Sri Lanka and has been promoted also a beach destination in abroad. As a result there were more tourists received by the Sri Lanka Tourism from the countries UK, German, France, Scandinavian countries, etc. and became these markets as a one of the top ten tourist arrivals generating markets. From the recent years tourists arrivals to country shows that the declining of the arrivals mainly due security situation in the country and other factors and also shows that the increasing of the arrivals from the Asian markets like India, China, etc. Therefore, the initiatives have been taken by the Sri Lanka Tourism to give priorities to the tourism promotions in Asian countries rather than focusing more promotions in European countries as a result major promotions started to tap China, India, Korea, etc. by focusing their future tourism potential for outbound travels. And also the initiatives were taken to position Sri Lanka as a destination beyond beaches - Nature, Culture and Adventure in to alternative tourism. The government also recognizes that there should be a tourism development policy will be co-ordinated with the Aviation Policy in order to promote the harmonious growth and development of both sectors hence the Aviation industry needs to be expanded by promoting and charter air carrier services to meet the growing demand for seats from the tourism sector

The government recognizes tourism as an essential activity for economic and social development of Sri Lanka. Accordingly, a tourism accorded high priority in its overall program of national development. As a result government planned by its Tourism Plan for (2006-2007); while the main thrust of promotion will be directed at attracting each holiday and sightseeing tourists, attempts will be made to diversify the tourism demand by tapping the other market segments such as “Special Interest” including adventure tourism and MICE travel. Eco-tourism will be developed as an important branch of “Special Interest Tourism”. The pace and extent of tourism

development envisaged in this plan is such that it would become a key sector of the national economy of Sri Lanka by the end of this decade.

### **1.2.5 Agro-tourism Industry in Sri Lanka**

Agriculture is the most important sector of the Sri Lankan economy. Even though its contribution to the gross domestic product declined substantially during the past 3 decades (from 30% in 1970 to 21% in 2000), it is the most important source of employment for the majority of the Sri Lankan workforce. Approximately 38% of the total labour force was engaged in agriculture in 2006 (CBSL, 2007).

Tea, rubber, coconut and rice have dominated by the whole agriculture sector in Sri Lanka and apart from rice other agricultural products bring in more foreign exchange earning to the economy.

Because of the declining of plantations including tea, there is need to introduce a value added product to develop agriculture sector.

From the niche markets mentioned above in Sri Lanka, agriculture sector in Sri Lanka has a large potential which can incorporate with the tourism industry, since Sri Lanka is purely an agricultural country. But the agriculture sector has not much incorporate with the tourism sector i.e. agro-tourism has not much developed as a market segment in Sri Lanka due to many reasons. According to the National Economic Encyclopaedia for the Asia & the Pacific, in the subsistence sector, rice is the main crop and farming rice is the most important economic activity for the majority of the people living in rural areas. During the last five decades the rice sector grew rapidly and output more than tripled, reaching the highest ever output of 2.9 million metric tons in 1999. Increases in the area under cultivation, and improved productivity due to the modernization of agriculture are the main reasons for an

increase in production. The rehabilitation of Sri Lanka's extensive ancient irrigation network and massive new investment in construction and maintenance of irrigation infrastructure led to a large increase in the area under rice cultivation.

In addition to rice, various other food crops are produced for local consumption. They include yams, pulses, grains, vegetables, and fruits. Most of these crops are cultivated in family gardens, except for potatoes and sugar. Sugar cane is cultivated in the dry zone, and Sri Lanka produces only 15% of what it consumes domestically.

The major plantation crops of tea, rubber, and coconuts continue to figure prominently in the economy of Sri Lanka; however, the contribution of these commercial crops to gross domestic product declined from 11.5% in 1970 to 5% in 2000.

Tea, the prominent crop of the plantation sector, grows in many parts of the wet zone, and in particular in the central hill country. Sri Lanka is famous for its high quality black tea, and is one of the largest suppliers in the world. In 1999, 269.3 million kilograms of tea (95% of total tea production) was exported, earning US\$ 621 million in foreign exchange. The United Kingdom, Russia, and the Middle East are the major export markets.

The second major commercial crop is rubber, growing in the ridge and valley country of the wet zone interior. Of 159,000 hectares under cultivation, about 80% was being tapped (harvested) and in 1999, 96.6 million kilograms of rubber were produced. A sizable proportion of rubber production is used in the domestic manufacturing sector (56% in 1999) and the remainder is exported. In 1999, export earnings amounted to US\$ 33 million. China is traditionally the major buyer of Sri Lankan rubber. The performance of this sector has been subject to instability due to unfavourable movements in world prices. Competition from synthetic rubber producers has

caused rubber prices to drop. However, with rising petroleum prices (the major ingredient for synthetic rubber) there is a chance for world rubber prices to improve.

The third commercial crop, coconuts, is grown mainly in the hinterland of the western seaboard. Production in 1999 accounted for 2,828 million nuts, the highest output since 1986. Coconut (mainly coconut milk) is a major ingredient used in food preparation in Sri Lanka, and nearly 65% of the output is consumed locally. The remainder is exported in the form of kernel products (desiccated coconut, coconut oil, copra), coconut cream, and coconut milk powder. In 1999, kernel products generated US\$ 129 million in foreign exchange.

Forestry and fishing are less important components of the economy. Forests in the dry zone were cleared for settlement and agriculture early on. Unsustainable agricultural practices such as chena cultivation and logging resulted in land degradation and a reduction in the size of forest reserves. The country has abundant fishing resources, with an exclusive economic zone covering over 500,000 square kilometres (193,050 miles), a coastline of about 1,700 kilometres (1,056 miles), and a massive network of inland water reservoirs suitable for fish farming. However, this potential has not yet been exploited. Most marine fishing is concentrated in coastal areas, which account for about 12% of the exclusive economic zone. Total fish production in 1999 was estimated at 280 thousand metric tons, and the contribution of this activity to gross domestic product was about 3% in 1999.

The livestock sector in Sri Lanka is small, consisting mainly of the dairy and the poultry subsections. Unlike in the United States, where dairy production takes place on large farms, in Sri Lanka dairy farming is a small-scale domestic activity. Total milk production in 1999 accounted for 342 million litres, sufficient only to meet about one-fourth of local needs. The remainder is imported in the form of powdered milk (in 1999, 54,000 metric tons of milk powder was imported). An important

development in the livestock sector was the rapid increase in the poultry production. In 1999, approximately 57 million metric tons of poultry meat was produced, increasingly becoming a common source of animal protein in Sri Lanka.

## **1.2.6 Tea Industry**

### **1.2.6.1 History of Tea: World**

Tea as discovered by Chinese Emperor Shen Nung in 2737 B.C., when a tea leaf accidentally fell into the bowl of hot water he was drinking. Tea comes from the plant *Camellia sinensis*, a warm-weather evergreen. Tea is grown around the world in thousands of flavourful variations. Like wines, many teas take their names from the district in which they are grown, and each district is known for producing teas with unique flavour and character.

While there are more than 1500 varieties of tea available worldwide, all teas can be divided into three basic types: black, green and oolong. The way the fresh tea leaves are process and their level of contact with oxygen determines the types of tea. During oxidation, the tea leaves experience natural chemical reactions that in distinctive taste and colour characteristics. Even though there is a another type of tea called “Herbal tea” do not come from *Camellia sinensis*, but are an infusion of leaves, roots, bark, seeds or flowers of other plants (Tea Association of Canada, 2007).

Among the world tea producing countries Sri Lanka, China, India, Kenya, Turkey, Indonesia and Vietnam are considered as a world largest tea producing countries in the world.

### **1.2.6.2 History of Tea: Sri Lanka**



The plantation industry in Ceylon, now called Sri Lanka, began in 1825 with the widespread planting of coffee. According to the History of Ceylon Tea (2007), in 1839, Dr. Wallich, head of the botanical garden in Calicutta has been sent several Assam tea plant seeds to the “Peradeniya Estate” in Kandy district. Seeds of Chinese tea plants also brought to Sri Lanka by travellers such as Maurice de Worms, were also planted in the same nursery although these yielded disappointing results, and Chinese plants were gradually abandoned in favour of the Assam variety that is now grown on every estate in Sri Lanka. However, these early arrivals were largely ignored for the more lucrative coffee craze that had seized the region. However, this booming industry came to a dramatic halt in 1869 when a leaf disease *Hemileia vastatrix* (known as the “coffee rust”) spread rapidly throughout the countryside, reaching every coffee district within the span of five years. In 1851, James Taylor had signed on for three years as an assistant supervisor on a coffee plantation in Ceylon and later he has been appointed to do the experiments with tea plants in the Loolecondera estate.

After Taylor has been able to set up the first tea “factory” on the island and sooner it has been come famous throughout the island. In 1872, Taylor has been able to invent a machine for rolling leaves, and one year later he has been able to send twenty-three pounds of tea to United Kingdom for auction. This was the first time that Ceylon Tea has been sent to abroad for sale in the history of Ceylon Tea. This opened a new era of the tea industry in the country. By 1890 tea production was at 22,900 tons up from just a mere 23 pound between 1873 and 1880 (History of Ceylon Tea, 2007).

### **1.2.6.3 Present Situation of the Tea Industry in Sri Lanka**

#### **1.2.6.3.1 Sri Lanka’s Perspective**

Out the above commodities, Tea (*Camellia Sinensis*) plays a major role in the economy as a generator of foreign exchange and employment opportunities. It has been ranked as the 3<sup>rd</sup> highest foreign currency earning industry in the country (CBSL, 2006). Ceylon Tea is often acclaimed "the best tea in the world" which has been introduced by the James Taylor during the British colonial period to Sri Lanka.

In 2003, tea accounted 13% of Sri Lanka's merchandise exports and earned US\$ 683 million. Until the 1980s when it was surpassed in net contribution by the Apparel sector, tea was Sri Lanka's leading export. Tea is also a 3<sup>rd</sup> largest agricultural industry in Sri Lanka and represents 2.3% of overall GDP. The tea industry directly and indirectly employs 1 million people in Sri Lanka. Currently 8% of Sri Lanka's tea export value is in the form of tea bags or instant tea products. Of total, value added exports; approximately 10-12% exported under local brand names. However, since 59% of tea exports are still in bulk form, the value of Sri Lanka's tea exports is still subject to commodity-based price swings.

Average yield of green leaf in Sri Lanka, while improving, are significantly less than those of competitors. The smallholder sector, which accounts for roughly 40% share of land under tea cultivation, continues to be more productive than the more traditional plantation sector and produces approximately 60% of tea grown in the country. The following statistics shows that the strength belongs to the Sri Lanka tea industry.

**Table 1.5** Tea Exports by Category - Year 2006

| <b>Category</b> | <b>Volume (Kg)</b> | <b>Value (Rs.)</b> | <b>FOB (Rs.)</b> |
|-----------------|--------------------|--------------------|------------------|
| Bulk Tea        | 197,849,012        | 45,695,577,725     | 230.96           |
| Tea Bags        | 19,107,540         | 10,658,634,323     | 557.82           |
| Tea Packets     | 79,425,692         | 21,042,002,958     | 264.93           |
| Green Tea       | 3,513,228          | 2,021,486,728      | 575.39           |

|             |            |               |        |
|-------------|------------|---------------|--------|
| Instant Tea | 1,045,463  | 773,259,012   | 739.63 |
| Other Tea   | 13,973,687 | 6,145,748,516 | 439.81 |

**Source:** Sri Lanka Tea Board, 2006

**Table 1.6** Major Ceylon Tea Importing Countries - 2006

| No. | Country      | Amount (Kg.)  |
|-----|--------------|---------------|
| 1   | Russia       | 59,272,295 Kg |
| 2   | UAE          | 44,127,252 Kg |
| 3   | Syria        | 30,573,285 Kg |
| 4   | Iran         | 27,880,267 Kg |
| 5   | Turkey       | 13,344,452 Kg |
| 6   | Iraq         | 12,066,277 Kg |
| 7   | Japan        | 10,899,431 Kg |
| 8   | Jordan       | 9,472,852 Kg  |
| 9   | Ukraine      | 8,282,352 Kg  |
| 10  | Tunisia      | 7,991,814 Kg  |
| 11  | Saudi Arabia | 7,412,285 Kg  |
| 12  | Chile        | 7,215,655 Kg  |
| 13  | Germany      | 5,978,362 Kg  |

**Source:** Sri Lanka Tea Board, 2006

**Table 1.7** Ceylon Tea Statistics - 2006

|  | Important Statistics         |
|--|------------------------------|
| Total Export Volume                          | 314,914,622 Kg               |
| Total Export Value                           | Rs. 86,336,709,262           |
| Average FOB Value                            | Rs. 274.16 per Kg            |
| Total Production of Ceylon Tea               | 310.8 Metric tons            |
| Land Area under Tea Cultivation of Sri Lanka | <b>Elevation Wise (Ha) -</b> |
|  | High Lands -<br>41,137       |
|  | Medium Lands -<br>71,081     |
|  | Low Lands -<br>109,814       |
|  | <b>Total 221,969</b>         |

**Source:** Sri Lanka Tea Board, 2006

### **1.2.6.3.2 Global Perspective**

Sri Lanka is the world largest tea exporter with 21% global export market share. Kenya, which produces mainly, cut, tear, curl (CTC) tea-used primarily in tea bags' has a similar market share. Total world production in 2001 was 3.1 million tons with Sri Lanka's share being 10%. About 4% of world production is CTC tea and 31% Orthodox tea, with green tea making up the balance. Sri Lanka competes mainly in the orthodox tea market where it has a 32% market share and is the leading producer. The types of tea exported by Sri Lanka, major tea importing countries from Sri Lanka and volume of tea in 2006 describes by Table 1.5, 1.6 and 1.7 respectively.

Sri Lanka receives a price premium for tea relative to most other exporting countries. Comparing the average FOB prices that prevailed between 1995 and 2000, it is evident that Sri Lanka received higher price for its tea exports compared to India, Kenya and Indonesia (The Competitiveness Initiative-Tea Cluster, 2007).

### **1.2.6.3.3 Potential to Develop Tea-tourism in Agro-tourism**

Sri Lanka, with consistent tropical weather conditions allows tea to be grown as a perennial crop. Sri Lanka's climate is ideally suited to producing a variety of teas of high quality, appealing flavours and aromas. Dr. P.D. Collier, former Chairman of the European Tea Technical Committee, commented that Ceylon Tea was one of the cleanest teas

produces (d), with an insignificant level of pesticide residue (History of Ceylon Tea, 2007).

Agriculture sector in Sri Lanka continues to be a major contributor to the national economy despite the growth in the manufacturing sector having following strength for the tea industry in Sri Lanka.

- 1) Tea is the 3<sup>rd</sup> foreign exchange earner to the country
- 2) Brand name for Ceylon Tea in the world market
- 3) Good climate for Agriculture as well as for tea
- 4) Beautiful tea plantations scattered in the country
- 5) Availability of demand for tea
- 6) Availability of sufficient labour force for this sector
- 7) Rich Bio diversity with lot of tourist attractions
- 8) Eco friendly environment
- 9) Community Participation
- 10) Diversifies the product mainly in rural areas
- 11) Availability of tourist accommodations and services in plantation sector
- 12) Development of the tourism sector in Sri Lanka

#### **1.2.6.3.4 Current Position of the Tea-tourism in Sri Lanka**

The world has become more and more conscious of the need to consume health foods. As a health drink, tea is in the forefront of all beverages. Sri Lanka is doing all things required to meet the demands of the consumers to satisfy them as to the purity of the beverage they consume.

Sri Lanka's tea plantations are mainly located in the higher elevations, which have a cool, pleasant subtropical climate, and a rich diversity of natural flora and fauna. The tea

country included within it, many of Sri Lanka's most beautiful protected wilderness area, among them the Horton Plains, the Adam's Peak wilderness and the Hakgala and Udawattekele nature Reserves.

By focusing this market segment there are many hotels and tourism services have been developed in this hill country area. Major tour operators, hoteliers are currently involving in tea-tourism market. There are some hotels have been built surrounding of the tea landscapes in the hill country that promotes tea among tourists from the plucking of tea till final tea production comes from the tea factory. And also many tea centres, tea shops have been developed to cater the tea to tourists.

Even though this market segment has not yet developed in the country by developing this will able to generate more employment opportunities while creating the beauty of the hill country.

A leading medical journals and experts declare tea as a potential heart tonic, cancer blocker, fat buster, immune stimulant, arthritis soother, virus fighter and cholesterol detoxifier. The chemicals in tea have been shown to protect the body against stomach, breast, colon, and skin cancers, to lower blood pressure, to lower serum cholesterol, and triglycerides, and normalize blood sugar. A Rutgers University study found that a component of black tea called TF-2 causes colorectal cancer cells to "commit suicide", reduced more growth in colorectal cancer. A Japanese study has found that gargling with black tea boosted immunity to influenza (History of Ceylon Tea, 2007).

Tea can be use as a plant in the hill since it has a characteristic to minimize the degradation of the hill country land area (Sri Lanka Tea Board, 2006).

When considering the tourism resources in plantation sector especially in the tea sector, Sri Lanka has ample opportunities to attract tourists through beautiful tea landscapes

in the county by focusing tea as a main viable commodity in the agro-tourism market. There are no actual statistics of this overall market size of the agro-tourism market, hence has to consider the size of this market as a size of the eco-tourism, rural tourism market or combination of both since this market segment belongs to eco-tourism or rural tourism. Various research studies and estimates revealed that the nature tourism market including ecotourism market is large and growing. But the ecotourism and all nature related forms of tourism account 20% of all international travel and ecotourism is worth of US\$ 20 billion a year (WTO, 1998).

In addition to that, Filion (1992, cited in Honey, 2003) estimated that the 40 to 60% of all international tourists are belongs to the nature tourists and 20 to 40% are wildlife related tourists.

According to Roberts and Hall (2001) tourism in rural areas makes up to 10 to 20% of all tourism activities and 23% of European holidaymakers choose the countryside as a holiday destination. It is also sure that this share is still growing and that tourism activities may therefore in future be one of the growing engine for a lot of rural areas.

There are no estimates of the agro-tourism but Fig. 1.3 describes that Agro-tourism is one of the form of “Nature Tourism or eco-tourism”.

This market segment is very important for the communities both urban and rural. It can have several functions, such as: income, employment, using free accommodation, activating the rural areas, preservations natural sources and also recreation and education of the urban community. The most common groups of functions are: socio psychology, economics and environment.

A resent survey highlighted that the nearly 30% and 62 two% of the tourists travelling to Sri Lanka visiting Nuwara Eliya, Bandarawela & Ella (hill country) and Kandy respectively (SLTB, 2006 b).

The tea growing regions also contain within them most of Sri Lanka's spectacular natural sights and wonders, which include the World's End gorge, the Ginigathena, Ramoboda, Haputale and Bulutota mountain passes, and the Ella gap. Many of the island's scenically spectacular roads and railways traverse lush tea gardens, making travel in this region a highly enjoyable experience.

All public sector organizations like the Sri Lanka Tea Board, Tea Small Holders' Development Authority, and Tea Research Institute (TRI) and the various private sector voluntary organizations associated with the tea industry are very conscious of their responsibility to meeting challenges in their field to satisfy the consumers.

In addition to that there are some private hotel companies have been developed the theme of Boutique Hotel concept by targeting Tea-tourism area for up market tourists.

Since there is a big potential for tea-tourism, more labour force, more tourist abreaactions were scattered in this tea plantation area it can be easy to developed this new market segment near future.

Therefore, by looking at these potential in the Agriculture industry in Sri Lanka, this research study aims to identify the potential of tea industry to develop tea-tourism in the agro-tourism industry in Sri Lanka by looking at the followings:

- 1.No formal study has been undertaken so far to incorporate tea into Tourism on a full scale.
- 2.Effort has not been taken to bring up external know how into the understanding of the local environment on tea-tourism.
- 3.Identify possible innovations highlighting the uniqueness in the light of differentiating tea-tourism product in Sri Lanka.



Therefore, this study aims to do an in-depth study to identify the potential of this industry and in trying to incorporate the two industries to bring about tangible benefits in a sustainable and in an effective manner to the economy of the Sri Lanka. Furthermore, this study aims to identify the problems, main challenges and reasons behind them in tea-tourism development and how community get benefitted through tea-tourism and finally the study intend to recommend the strategies for each stakeholder for the future development of this new segment.

### **1.3 Aim and Objectives of the Study**

#### **1.3.1 Aim**

The aim of this research is to study the potential for the sustainable development at the tea-tourism industry in Sri Lanka.

#### **1.3.2 Objectives of the Study**

The following objectives were identified by the author to reach the above aim:

- 1) To identify the existing facilities, services & other products and the ways to find out value added services and products which the sector can offer for the visitors through tea tourism
- 2) To investigate the market potential for tea-tourism and identify the existing problems, main challenges and reasons behind them in the development of agro- tourism
- 3) To identify the factors needed to incorporate the tea into tourism sector.

- 4) To identify the ways in which community can benefit from tea-tourism.
- 5) To develop recommendations to the (a). Agro-tourism sector (including tea-tourism sector) and (b). Stakeholders for future development.

#### **1.4 Significance of the Study**

- 1) The study provides information on potential areas in the country which can promote tea-tourism. This study provides information on the places or resource base currently promoting this market segment.
- 2) Locally there are many different kinds of organization i.e. government, private or non government organization to manage, supervise or care each resource base in the country. Some times the area of supervision overlaps and not clearly defined at the beginning. The study will identify what resource managing organizations need to be working together and what are the possible benefits which the new market segment gets by developing these.
- 3) The study make effort to investigate barriers and other related problems which will affect to the development of this segment
- 4) Investigate the stakeholder co-operation and collaboration for tea tourism development in the agro-tourism area.
- 5) Investigate the existing facilities, services & other products which enable to promote tea-tourism.
- 6) Investigate the value added things which the agro industry can offer for the visitors through tea-tourism.

- 7) Investigate the economic & social benefits which can obtain by the community from the tea-tourism.
- 8) This study fulfil for some extent on the current research gap in the light of sustainable development of the Tea industry in agro-tourism sector.
- 9) The study will also investigate how stakeholders and community collaborating with each other to promote tea industry in the agro-tourism sector.

## **1.5 Scope of the Study**

### **1.5.1 Scope of Time**

Total study period commenced from December 2007 to Mach 2008. The respective questionnaires and in-depth interviews were carried out in December 2007/January 2008.

### **1.5.2 Scope of Geography**

To reach the aim of the study, six stakeholders were identified in this study i.e. international visitors, local community in selected tea plantation areas, service providers in tourism sector, service providers in plantation sector, public sector and other government authorities related to the study and researchers and scholars and six surveys were carried out in order to get the required information from each stakeholder category. A survey of international visitors was conducted at the departure lounge of the Bandranaike International Airport (BIA) in December 2007 to interview the foreign tourists those who visited Sri Lanka. A sample of community groups were considered to obtain required information to fulfil the objectives of the study from the Maskeliya and Bogawantalawa tea plantation areas since these areas has a great potential for the tea-tourism industry. There were no specific area to obtain the

information from the service providers in tourism sector, service providers in plantation sector and researchers and scholars but depending on the place they are stationed. Collection of data from the Government authorities was collected in and around Colombo.

### **1.5.3 Area of Research**

Study to identify existing facilities, services and other products and the ways to find out value added services and products which the sector can offer for the visitors through tea-tourism. Investigate the market potential for tea-tourism and identify the existing problems, main challenges and reasons behind them in the development of tea-tourism. Tea and tourism sectors remain as isolated sectors in the country. Hence, seek to investigate the present stakeholder co-operation and collaboration in tea industry and to identify factors needed to incorporate tea into tourism effectively. Investigate the area can be promote in tea-tourism and also study about the places or area currently promoting this market segment. Highlight the ways in which community can benefited through tea-tourism.

### **1.5.4 Scope of Demography**

International visitors who were departing from the country after their staying in Sri Lanka were selected randomly and conducted the respective survey at the departure lounge of the Bandranaike International Airport (BIA). To get the information from the visitors from different as per the stratified random sampling technique, specified flight times were selected from the weekly flight schedule of the airport. In order to get the respective information from the tourists from the respective market segments, the staffs of the Sri Lanka Tourist Board who are competent in French, German, Chinese and Japanese were employed after given the proper training for them.

For local community, two areas i.e. Maskeliya and Bogantalawa tea plantation estates where the areas having greatest potential for tea-tourism were selected to represent the community those who are living in tea plantation areas.

A respective information from Service Providers in Tourism sector were gathered from Colombo and hill country areas such as Nuwara Eliya, Talawakele and Haputale consisting tour operators, hotels, restaurants, tea shops, travel agents, tourist guides, etc.

Data collection for Service Providers in Plantation sector (Tea industry) were gathered main from the tea plantation companies, tea factories, tea broker companies and tea Exporting companies in Colombo and tea plantation areas.

A respective data from the Tourism Resource Base Managing Organizations (TRBMO) (Public sector and other government authorities) were collected from the senior and relevant officials in the tourism related government organizations such as Ministry of Tourism, Sri Lanka Tourist Board, Sri Lanka Convention Bureau, tea, agriculture and environmental related government organizations such as Ministry of Plantation Industries, Sri Lanka Tea Board, Tea Small Holders Development Authority, Department of Agriculture, Sri Lanka Council for Agricultural Research Policy, Provincial Councils and Central Environment Authority and Ministry of Urban Development and Scared Area Development in Colombo and tea plantation areas.

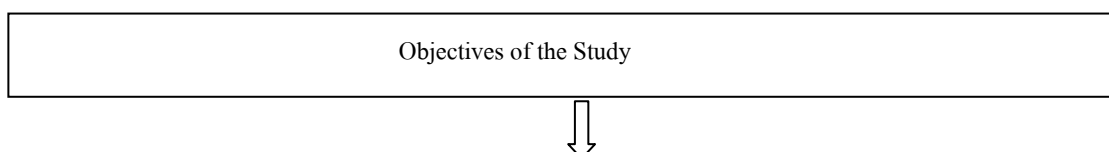
Data collection for Researchers and Scholars were collected from the academic institutions, researchers and non governmental organization who have expertise knowledge in tourism and tea industry in and around Colombo and respective areas.

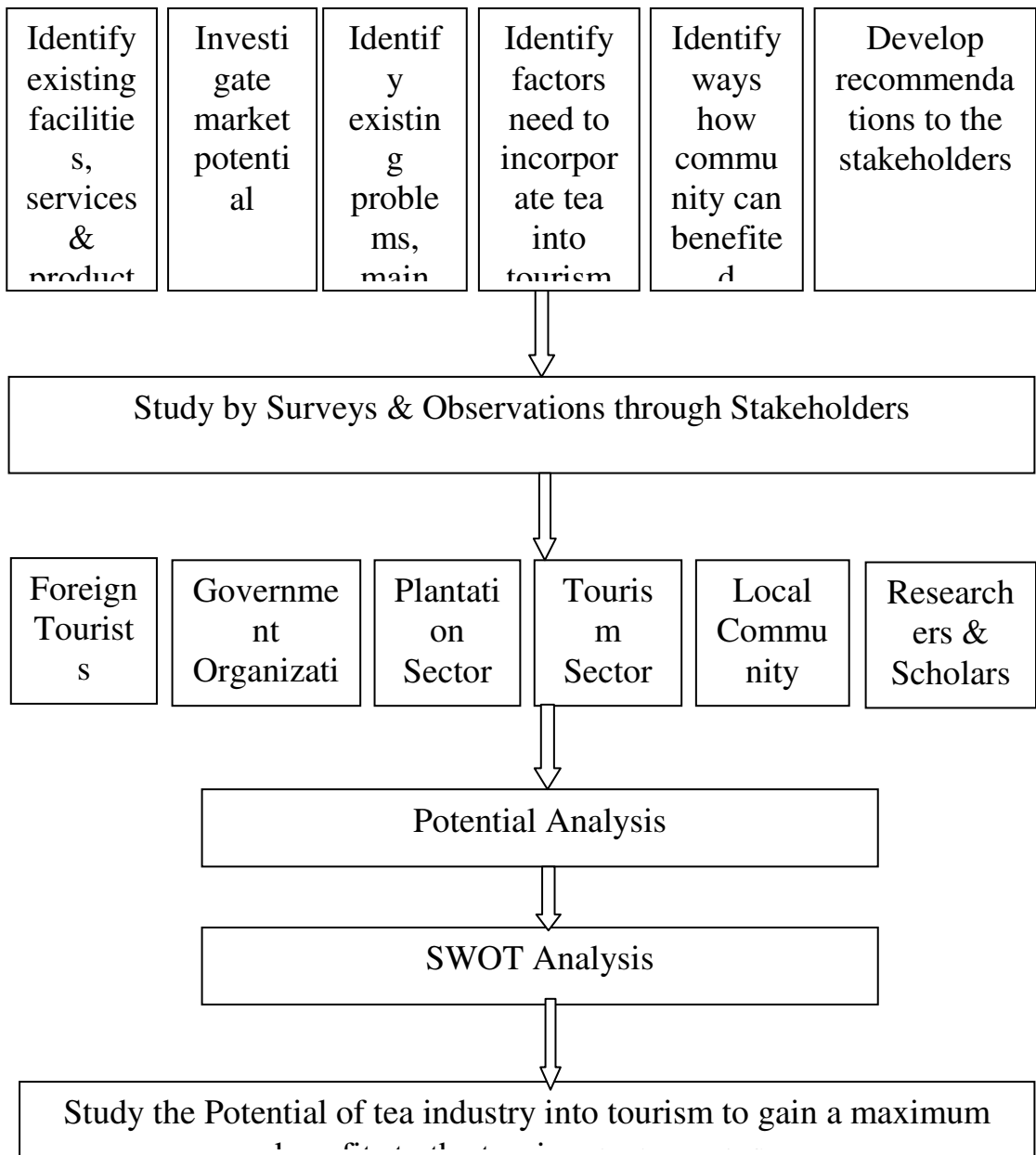
## **1.6 Assumptions**

- 1) Tea industry in Sri Lanka mainly divided in to three broader regions i.e. Hill country, Mid country and Low country as per geographic characteristics. In fact, taste of the tea also differs from these geographic characteristics. To make representative sample of the population Low country, Mid Country and Hill country areas should be taking into consideration. But due to time limitation, financial constrains and availability of resources, researcher considered the Hill country area to conduct the above research by taking Nuwara Eliya, Maskeliya , Bogawantalawa and Udupusellawa divisions since this area contributes the high tea production and also having the beautiful tea landscapes in the country.
- 2) To make a representative sample of the population, it is required to consider the seasonality patterns when conduct survey by considering foreign tourists visiting to Sri Lanka. Therefore, tourists have to be interviewed by considering different time periods to avoid the seasonality. But due to time limitation, financial constrains and availability of resources, a survey for international visitors was conducted during December 2007 to obtain required information from the international visitors when they departed from the airport.

## 1.7 Conceptual Framework

**Figure 1.4** Conceptual Framework





## **CHAPTER 2**

### **METHODOLOGY**

Throughout this research study there are six types of stakeholder groups (international visitors, community in tea plantation areas, service providers in the tourism sector, service providers in the tea plantation sector, public sector and government authorities and researchers and scholars) were used as the population of this study to obtain data with respect to their involvement with the tea and travel trade. Basically, primary data were collected during the period of December 2007 to 2<sup>nd</sup> of January 2008 depending on the various characteristics of the stakeholders. Since the different kinds of stakeholders having different objectives, behavioural patterns, benefits getting from the industry and contribution to the industry, etc, a mix sampling methods were applied throughout the research except from the Researchers and Scholars to get the data instead of having quantitative and qualitative surveys separately in order to save the time and resources by considering the study.

According to the type of the stakeholders, respective data were collected with their views, opinions and comments through following different sampling techniques to achieve the above objectives of the study: Stratified random sampling method for international tourists, Purposive sampling method for Service providers in Plantation sector and Scholars, Convenience sampling method for tourism based resource managing organizations (TBRMO), Snowball sampling method for Service providers in Tourism sector and Multi stage cluster sampling method for Local community. The respective data were collected with structured and semi structured questionnaires through face to face interviews by using the said sampling techniques from above six stakeholder categories. The surveys were carried out during the month of December 2007 to 2<sup>nd</sup> January 2008. The quantitative data for analysis were



gathered from all stakeholders mentioned above except stakeholder category of researchers and scholars and the same were analyzed by using SPSS 15.0 for Windows evaluation version through statistical analysis tools. The qualitative data were analyzed by using content and SWOT analysis to obtain recommendations for this study.

## **2.1 Population of the Research**

As yet there is no clear conformity on what tourism activity and to what extent is tea-tourism, i.e. market size, it was not easy to find the clear identification of the respective stakeholders and the defining of the population. There are many stakeholder categories exist in the tea-tourism, some of them are directly involved and some of them are indirectly involved in this sector. Hence, their level of involvements, contribution, level of benefits and type benefits share with the tea-tourism are also unable to quantify. Therefore, the length and the breath of the population is not clear. It was resulted that the researcher had a great difficulty to identify the exact population for this survey. However, finally this study considered the following list of stakeholders as a highest contributing sector of this study.

### **2.2.1 Selection of Stakeholders**

As indicated before, it was difficult to identify the exact stakeholder categories of the population for tea-tourism due to many factors mentioned above. Anyhow following stakeholders were identified by the researcher at the preliminary stage.

1. Service providers in the tea industry  
(Plantation companies, tea broker companies, tea exporting companies, tea factory owners, etc.)

2. International & domestic visitors
3. Government Authorities: Provincial Councils, Ministry of Tourism, Tourism Board, Hotel School, Ministry of Plantation Industries, Sri Lanka Tea Board, Tea Small Holders Development Authority, Central Environmental Authority, Department of Agriculture, etc.)
4. Protected area managers and land owners
5. Non Governmental Organizations (NGO's)
6. Tea smallholders
7. Local communities in respective tea plantation areas
8. Academic institutions (TRI, NIPM), researchers and scholars
9. Other specific interest groups
10. Service providers in the tourism sector (Hotels, guest houses, travel agents, transport providers, tour operators, tourist shops, restaurants, guides, etc.)

By considering the time limitation, financial constrains and resource availability, the following six stakeholders were identified in this study:

1. International visitors
2. Local community in respective tea plantation areas
3. Service providers in the tourism sector
4. Service providers in the tea industry
5. Public sector and other government authorities in tea and tourism
6. Even though the other sectors are important, due to practical and time limitations Researchers & Scholars those who have broad knowledge in this area were taken as a stakeholder to get data to fill the gap. It includes universities, research institutions such as NIPM, etc., environmentalists,

ecologists, economists, teachers, NGO's, community leaders, etc.)

The reasons behind to identify the above stakeholders were, considering the direct involvement with this sectors and by considering the significance of the research study as described bellow.

Since there is no way or method to identify and interview exact type of tourists who interested to the tea-tourism/nature, all international visitors were considered under the category of international visitors.

The local community, either they involve in tea-tourism or not, but living in tea plantation areas (Maskeliya and Bogawantalawa) were included in the category of local community, because ultimate objective is to provide maximum benefits to the local communities in the sustainable tourism development.

In the business community of the tourism industry, all kinds of services providers such as hotels, guest houses, travel agents, transport providers, tour operators, tourist shops, restaurants, guides, etc. were taken into accounts under the category of service providers in tourism Sector.

In the business community of the tea plantation industry, all kinds of service providers such as plantation companies, tea broker companies, tea exporting companies, tea factory owners, tea smallholders, etc. were considered as the category of service providers in the tea industry.

All public sector and government authorities related to tea-tourism such as Ministry of Tourism, Sri Lanka Tourism Board, Sri Lanka Convention bureau, Hotel School, Ministry of Plantation Industries, Sri Lanka Tea Board, Tea Small Holders Development, Authority, Central Environmental Authority, Ministry of Agriculture, etc. taking into account as a Tourism Resource Based Managing Organizations (TRBMO).

Academic and research institutions, NGOs, researchers and expertises in the tourism and agriculture fields were included into the category of Researchers and Scholars.

## **2.2 Research Method - Design and Instruments**

When the research consisting of multi faced stakeholders and their differences in characteristics, the research got apparently complex. Though some stakeholders have similar characteristics but different types of sub groups, e.g. academic institutions, researchers, etc. the research method got further composite. In many situations, sample size of different stakeholders is varying from one and another depends on the populations and other characteristics as in this study. Therefore, researcher had to look for for different sampling techniques and data collection methods for each sample size of the stakeholders in this study. In addition to the above respective questionnaires for each stakeholder category were designed by considering the nature of respective stakeholders and the objectives of the study. In addition to the above, different kinds of stakeholder have different objectives, behavioural patterns, benefits getting from the industry and contribution to the industry as well. Therefore, by taking into account the above mentioned reasons, researcher decided to employ the mix sampling methods in order to save the time and resources to collect the necessary and sufficient data for the research. As a result, the research was conducted with mixed sampling method to collect the quantitative and qualitative data of the study and both were included in the respective questionnaires separately. More over, additional comments and suggestions were gathered during the survey as well.

### **2.2.1 Questionnaire Design and Survey - International Visitors**

Tea-tourism is not yet developed in Sri Lanka as a market or segment under the “Special Interest Tourism”. And also it not possible to identified the visitors who especially visits to tea-tourism market segment, but most of visitors’ couple this segment as a part of their journey under the nature and adventure. Though there is such a difficulty, the size of the market segment, the visitors’ perception levels, their interests, etc. can be finding out by conducting proper research.

International visitors are primary important stakeholder sector in this study whose responses are high; therefore researcher decided to collect the respective data through distribution of structured questionnaires and interviews of the international visitors in such a manner. By considering the time factor, resource available and type of information required for the survey as per the research objectives, the following four sections included in the structured questioner in order to group the data for easy analysis. The four sections were:

- Part 1: Visitor preference, activities and expenditures
- Part 2: Agro-tourism resources and tourist perception
- Part 3: Visitor opinions and suggestions
- Part 4: Visitor profile

The first three parts of the questionnaire were designed to gather the related information as per the set objectives of the study and the fourth part was designed to gather mainly demographic information pertaining to the study which is comparatively less important than other parts of the questionnaire even if visitors do not responds. Part one is mainly focused on to gather the information of the visitor preferences of the prior visit to the country and experiences and expenses incurred during the staying in the country. Part two consists of the visitor assessment on the resources available in tea-tourism, impression on the tea-tourism and also on the destination. The third part of the questionnaire was designed to get the

information on visitors awareness on Ceylon Tea and Tea Plantations in Sri Lanka, sources of the above, visitors' satisfaction levels during their staying in Sri Lanka and mainly to get their suggestions, opinions and recommendations in tea-tourism.

## **2.2.2 Population, Sample Size and Sampling Technique**

### **International Visitors**

As mentioned in the previous sections, there is no specific size of the market segment of tea-tourism where visitors are visiting to get the experience of this tea-tourism. Since there is no socio- demographic data on tea-tourism, it was decided to employ stratified random sampling technique to select the required sample. To make a representative sample of the population, population was stratified according to the country of residence though the population could be stratified further according to the age, gender, etc. The purpose of the above stratification done by country of residence is by considering the time availability, resources availability, financial constrains and also by considering the difficulty to get the permission from the airport authorities to conduct the survey for a longer period due to security situation at the airport and the country. A sample size 400 was calculated using Taro Yamane formula at 0.05 (95%) level of confidence in order to find out the representative sample of the population by based on the 2006 year tourist arrivals to Sri Lanka since the tourist statistics has not been published by the Sri Lanka Tourism Development Authority for the year 2007 during the survey period.

$$n = N/[1+Ne^2]$$

n: Sample size

N: Size of the population (target number of tourists)

e: Inexactness from sample at confidence level at 95%

$$\begin{aligned} n &= 559,603/[1+559,603 (0.05)^2] \\ &= 399.71 \\ &\approx \mathbf{400} \end{aligned}$$

Therefore, Stratified Random Sampling method was applied by the researcher to make a sample as a representative sample of the population by stratifying according to the country of residence by applying the sample size as 403 due to round off the tourist arrivals from the above stratification as shown in Table 2.1.

Before finalized the questioner for the international visitors, it was tested by conducting a pilot survey prior to the main survey at the Tourist Board's Travel Information Counter (TIC) when international visitors are visiting to get the information from that counter. Finally, the main survey was able to conduct at the departure lounge of the Bandaranake International Airport (BIA) during the tight security situation at the airport for the period of three weeks in December 2007. There are six Tourist Board officials those who are competent in German, Japanese, French and Chinese languages were engaged to conduct the above survey under the supervision of the researcher. In order to obtain the reliability of information from the international visitors and also to get the said information from the approved time period by the airport authority, three day training was given to enumerators by the research prior to conduct the above survey. In order to collect the required information from the sample of international visitors, researcher decided to cover whole flights departs from the airport and a working roster was prepared to allocate required enumerators by considering their language competent to collect the information as per the flight destination. To maintain the reliability of the information of the survey, international visitors were

interviewed by distributing questionnaires at the waiting area of the departure lounge at the airport after completing their travel formalities. After completing of each questionnaire and the interviews from every visitors, a complimentary tea souvenirs arranged by the Sri Lanka Tea Board were distributed among responded visitors during the survey period by depicting the “Ceylon Tea” brand of Sri Lanka.

**Table 2.1** Sample Distribution of the International Visitors

| <b>Region</b>  | <b>Total</b>         | <b>Market</b>    | <b>Sample</b> | <b>Approx.</b>     |
|--|----------------------|------------------|---------------|--------------------|
|  | <b>Arrivals-2006</b> | <b>Share (%)</b> | <b>Size</b>   | <b>Sample Size</b> |
| <b>Main Sectors of North America, Latin America &amp; the Caribbean:</b> |                      |                  |               |                    |
| Canada   | 14,623               | 40.51            | 10.45         | 10                 |
| USA  | 20,700               | 57.34            | 14.80         | 15                 |
| Latin America & the Caribbean  | 775                  | 2.15             | 0.55          | 1                  |
| <b>Sub Total</b>   | <b>36,098</b>        | <b>100.00</b>    | <b>25.80</b>  | <b>25</b>          |
| <b>Main Sectors of Western Europe:</b>                                   |                      |                  |               |                    |
| UK   | 88,306               | 38.66            | 63.12         | 63                 |
| Germany  | 47,402               | 20.75            | 33.88         | 34                 |
| France   | 22,693               | 9.93             | 16.22         | 16                 |
| Netherlands  | 19,360               | 8.47             | 13.84         | 14                 |
| Italy  | 12,424               | 5.44             | 8.88          | 9                  |
| Switzerland  | 7,727                | 3.38             | 5.52          | 6                  |
| Scandinavian Countries   | 13,353               | 5.85             | 9.54          | 10                 |



|  |                |               |               |            |
|--|----------------|---------------|---------------|------------|
| (Norway, Sweden,<br>Denmark & Finland) |                |               |               |            |
| Others(Austria, Belgium,<br>Spain)     | 17,180         | 7.52          | 12.28         | 12         |
| <b>Sub Total</b>                       | <b>228,445</b> | <b>100.00</b> | <b>163.29</b> | <b>164</b> |
| <b>Main Sectors of Eastern Europe:</b> |                |               |               |            |
| Russia                                 | 7,985          | 56.15         | 5.71          | 6          |
| Others                                 | 6,236          | 43.85         | 4.46          | 4          |
| Total                                  | 14,221         | 100.00        | 10.17         | 10         |
| <b>Main Sectors of Middle East:</b>    |                |               |               |            |
| <b>Sub Total</b>                       | <b>10,345</b>  | <b>100.00</b> | <b>7.39</b>   | <b>8</b>   |
| <b>Main Sectors of Africa:</b>         |                |               |               |            |
| South Africa                           | 1,116          | 34.50         | 0.80          | 1          |
| Others                                 | 2,119          | 65.50         | 1.51          | 1          |
| <b>Sub Total</b>                       | <b>3,235</b>   | <b>100.00</b> | <b>2.31</b>   | <b>2</b>   |

Table 2.1 (Continued)

| <b>Region</b>                | <b>Total</b>         | <b>Market</b>    | <b>Sample</b> | <b>Approx.</b>     |
|------------------------------|----------------------|------------------|---------------|--------------------|
|                              | <b>Arrivals-2006</b> | <b>Share (%)</b> | <b>Size</b>   | <b>Sample Size</b> |
| <b>Main Sectors of Asia:</b> |                      |                  |               |                    |
| India                        | 128,370              | 53.02            | 91.76         | 92                 |
| Maldives                     | 24,831               | 10.26            | 17.75         | 18                 |
| Japan                        | 16,189               | 6.69             | 11.57         | 11                 |
| Malaysia                     | 9,713                | 4.01             | 6.94          | 7                  |

|   |                |               |               |            |
|---|----------------|---------------|---------------|------------|
| Singapore   | 7,012          | 2.90          | 5.01          | 5          |
| Pakistan  | 11,145         | 4.60          | 7.97          | 8          |
| China   | 16,274         | 6.72          | 11.63         | 12         |
| Others  | 28,598         | 11.81         | 20.44         | 24         |
| (Bangladesh, Hong Kong, Indonesia, Korea, Thailand, Taiwan, Nepal, Philippines, etc.) |                |               |               |            |
| <b>Sub Total</b>  | <b>242,132</b> | <b>100.00</b> | <b>173.07</b> | <b>177</b> |
| <b>Main Sectors of Australasia:</b>   |                |               |               |            |
| Australia   | 21,849         | 86.95         | 15.62         | 16         |
| New Zealand   | 3,147          | 12.52         | 2.25          | 2          |
| Others  | 131            | 0.52          | 0.09          | 0          |
| <b>Sub Total</b>  | <b>25,127</b>  | <b>100.00</b> | <b>17.96</b>  | <b>18</b>  |
| <b>Grand Total</b>  | <b>559,603</b> |               | <b>400.00</b> | <b>403</b> |

Source: SLTB, 2006

### 2.2.3 Questionnaire Design and Survey - Local Community

Southern, Western, Central and Cultural Triangle areas are mainly concentrated in tourism in Sri Lanka. Apart from them, tea plantations are scattered mainly in three regions i.e. high country, mid country and low country in Sri Lanka. Some of the above areas are popular or tourism and some of them are not. But according to the research study conducted by the Sri Lanka Tourist Board in 2005, 30% of the visitor travelled to Sri Lanka has visited Nuwara Eliya, Bandarawela and Ella which most popular areas having beautiful tea plantations in the country. According to the study, it was very difficult to conduct the survey for the local community who are living in the tea

plantation areas due to time factor, resource availability and financial constrains. Therefore, researcher selected the most viable and potential areas i.e. Bogawantalawa and Maskeliya recommended by the Tea Planters Association in Sri Lanka to conduct the above survey since there are some companies promoting tea-tourism in large scale which highly potential for this market segment.

By considering the time factor, resource available and type of information required for the survey as per the research objectives, the following five sections included in the structured questioner in order to group the data for easy analysis. The five sections were:

- Part 1: General Information (Visitor profile)
- Part 2: Community awareness on agro-tourism
- Part 3: Socio & cultural aspects of tea-tourism
- Part 4: Environmental aspects of tea-tourism
- Part 5: Judgments of the community on economic impact of tea-tourism

The first three parts of the questionnaire were designed to gather the profile of the local community living in tea plantation areas and their income levels. Part 2 to Part 5 were designed to gather the information on their preferences, impressions, their contributions to the tea-tourism, their suggestions to the future development of tea-tourism. Since majority of the tea plantation community communicate in Tamil language researcher had to translate respective questionnaire to Tamil language.

#### **2.2.4 Population, Sample Size and Sampling Technique - Local Community**

In this stakeholder category population is scattered in the up country & Low country in the plantation sector geographically. Each area belongs to the respective province and each province having districts. Each district divides to AGA divisions and further AGA divisions divided to GN (Grama Niladari) divisions. Therefore, to make a representative sample of the population researcher suggested to applying Multistage Cluster Sampling method to collect the data from the local communities in the plantation sector. To design the sample frame for this sector, respective data were obtained from the Census & Statistics Department in Sri Lanka. Researcher had a great difficulty to select the sample of household members living in the selected areas i.e. Bogawantalawa and Maskeliya since these areas are geographically located in the hill country. And also it is very difficult to collect the required information according to the time frame available if the suitable areas do not select by the researcher. Hence the researcher selected “Osborn” and “Castlereagh” divisions from “Maskeliya” area and “Bogawantalawa Estate” and “Bogawana” divisions from “Bogawantalawa” area as per the recommendation given by the “Grama Niladari” who is responsible government servant for these areas by considering the above factors and the potential for the existing tea-tourism development in the said areas. As per the households information collected from the Census & Statistics department population were stratified into the sub divisions of the “Maskeliya” and “Bogawantalawa” areas. As mentioned in the above factors above for sub divisions were selected to collect the required information and there were seventy five questionnaires were distributed among the tea plantation community in each area. In order to get the reliable information, four young Tamil speaking youth were selected as per the recommendation given by the responsible government servant for these areas and they were trained by using the translated questionnaires. In addition to the above, researcher selected the date to distribute the questionnaires as a holiday

since most of the main household members will available their houses during the particular day.

### **2.2.5 Questionnaire Design and Survey - Service Providers in Tourism Sector**

Service Providers in Tourism sector plays a major role in the tourism development in the country and some of them are leading service prodders while other plays a small role for the industry. Nevertheless, all service providers in this sector are more important to the stability of the industry. Therefore, researcher decided to collect data from these sector service providers by representing majority as per the research objectives. As per the preparation of the questionnaire, researcher included five sections in order to get the required information.

Part 1: Service/Facilities characteristics

Part 2: Tea-tourism markets and potential characteristics

Part 3: Product development in tea-tourism

Part 4: Cooperation and collaboration in tea-tourism

Part 5: Recommendations and Suggestions

Part 1 of the questionnaire was designed to investigate the strength and to find the categories of the service providers available in this tourism sector within the study. Part 2 of described the market size that these service providers are handling, potential markets for abroad and tea and tourism segment characteristics. Part 3 and 4 describes the product development in this sector and to investigate the responsible organization to work together to future development in this tea-tourism. Finally, part 4 designed to find out the information which to be used to SWOT analysis.

### **2.2.6 Population, Sample Size and Sampling Technique - Service Providers in Tourism Sector**

There are many tourist establishments are involving in the tourism industry in Sri Lanka. Some establishments are directly involved with the tea and tourism industry some are indirectly involved. Therefore, researcher selected snowball sampling method to identify the specific providers who involved with tea-tourism. There were 30 questionnaires were collected by representing many service provider types in the tourism industry e.g. tour operators, travel agents, hotels, restaurants, souvenir shops, transport providers, tea shops, etc.

### **2.2.7 Questionnaire Design and Survey - Service Providers in Tea Plantation Sector**

Service Providers in Tourism sector plays a major role in the tea industry in the country and some of them are leading service providers while other plays a small role for the industry. Some of them are directly involved with the tourism industry and some of them are indirectly involved. Researcher decided to collect data from these sector service providers by representing majority as per the research objectives. As per the preparation of the questionnaire, researcher included five sections in order to get the required information.

Part 1: Service/Facilities characteristics

Part 2: Tea-tourism markets and potential characteristics

Part 3: Product development in tea-tourism

Part 4: Cooperation and collaboration in tea-tourism

Part 5: Recommendations and Suggestions

Part 1 of the questionnaire was designed to investigate the strength and to find the categories of the service providers available in this tea industry within the study. Part 2 described the assessment of market size that these service providers are handling, potential areas to develop tea-tourism and tea and tourism segment characteristics. Part 3 and 4 describes the product development in this sector and to investigate the responsible organization to work together to future development in this tea-tourism. Finally, part 4 designed to find out the information which to be used to SWOT analysis.

### **2.2.8 Population, Sample Size and Sampling Technique - Service Providers in Tea Plantation Sector**

There are many tourist establishments are involving in the tourism industry in Sri Lanka. Some establishments are directly involved with the tea and tourism industry some are indirectly involved. Therefore, researcher selected purposive sampling method to collect the required information from the service providers who involved with tea industry. There were 30 questionnaires were collected by representing many service provider types in the tea industry e.g. tea plantation companies, tea factories tea broker companies, etc.

### **2.2.9 Questionnaire Design and Survey - Tourism Resource Based Managing Organizations**

This service provider category plays a most important role in the tourism and or tea industry in Sri Lanka. Most of the above stakeholder category organizations play their

role as a resource managing organizations, policy formulator, conservator and facilitator in the development of tea and tourism industry. By considering the above fact, researcher suggested to interview respective higher officials in the related organizations. In order to obtain more information on the above areas researcher designed the semi structured questionnaire by consisting following sections.

Part 1: Organizational characteristics to the tourism sector

Part 2: Tea-tourism in the tourism sector

Part 3: Community and stakeholder partnership

Part 4: Recommendations and Suggestions

Part 1 of the questionnaire was designed to investigate the involvement of the tea and tourism sector of the respective organizations. Part 2 described the scale of involvement; find out the value addition methods new potential areas to develop tea-tourism and to find out community involvements in this segment. Part 3 and 4 describes the community and stakeholder partnership in tea-tourism and to find out information for the SWOT analysis.

### **2.2.10 Population, Sample Size and Sampling Technique - Tourism Resource Based Managing Organizations**

Under this category of stakeholders, does not have the same size of level which differs from one stakeholder to other stakeholders. If it is institutional level which is higher than the government level and also characteristics of some government and public sector stakeholders are belongs to this study from the plantation sector areas. Therefore, researcher suggests to collecting data from the respective stakeholders through Convenience Sampling method by considering the time



availability, financial constraints and resources. Therefore, 30 questionnaires were collected while interviewing the said officials from the respective government officials such as Sri Lanka Tourism Board, Ministry of Tourism, Sri Lanka Convention Bureau, Hotel School, Ministry of Plantation Industries, Sri Lanka Tea Board, Tea Small Holders Development, Authority, Central Environmental Authority, Ministry of Agriculture, etc.

### **2.2.11 Questionnaire Design and Survey - Researchers and Scholars**

This stakeholder group is the 6<sup>th</sup> group of this study. Generally, this stakeholder category does not have any particular interest or getting benefits through this tea-tourism, but they have broader knowledge of tea and/or tourism industry in Sri Lanka. This category includes academics in the Universities, Research institutions such as NIPM, etc., Environmentalists, Ecologists, Economists, Teachers, NGO's, Community leaders, etc. Researcher was designed the questionnaire for this category stakeholder to analyse the data in a qualitative manner by including open ended questions to the questionnaire since these category respondents are most knowledgeable of tea and/or tourism industry. Therefore, respective questionnaire was designed with following five sections in order to get the broader information from the said category according to the research objectives.

Part 1: Involvement in tea-tourism

Part 2: Tea-tourism market and potential characteristics

Part 3: Product development in tea-tourism

Part 4: Cooperation and collaboration in tea-tourism

Part 5: Recommendation and suggestions

Part 1 of the questionnaire described the Researchers' and Scholars' involvements in their specialized areas while Part 2 describing the market and potential characteristics of tea-tourism. Part 3 has been designed to obtain broader information on the existing and suggested product development in tea-tourism sector. Part 4 included to investigate the responsible organization to work together to future development in this tea-tourism.

#### **2.2.12 Population, Sample Size and Sampling Technique - Researchers and Scholars**

This category of stakeholder is different from the previous five categories since this category some times does not fully focused only for this subject, some times they are not getting any kinds of benefits from this area or some times they may work in a non governmental organizations (NGO's), etc but this category more important since they have wide knowledge and experienced in this subject area. Therefore, it is idea if such a contribution can be obtained for this area specially by focusing their involvement to area; views on this new market segment, the ways of develop this area compatible to the country, potential of the market and finally suggestions for future development of this area. Therefore, by considering this, researcher suggests to applying Purposive Sampling method since the researcher will uses the scholars knowledge to determine who or what study units are the most appropriate for inclusion in the study based on the potential study units' knowledge base or closeness of fit to criteria associated with the study's focus.

### **2.3 Distribution of Sample Sizes and Sampling Techniques**

Table 2.2 describes the sample distributions, sampling techniques and survey instruments on the whole research study as a summary.

**Table 2.2** Sampling Distributions of the Research Study

| Stakeholders                | Population   | Sampling Technique                | Survey Instrument                             | Target Group                                   | Population Size | C.I  | Sample Size approx. |
|-----------------------------|--|-----------------------------------|---|--|-----------------|------|---------------------|
| 1. International Tourists   | International Tourists   | Stratified random sampling method | Structured Questionnaires                     | International Tourists                         | 559,603         | 0.05 | 403                 |
| 2. Government Organizations | SLTB, Tea Board, Ministry of Tourism, TSHDA, PC, AGA, FD, CEA, MPI | Convenience Sampling method       | Semi-structured questionnaires and interviews | Selected senior officials in the area of study |                 | 0.05 | 30                  |

**Table 2.2** (Continued)

| Stakeholders   | Population  | Sampling Technique        | Survey Instrument                             | Target Group   | Population Size | C.I  | Sample Size approx. |
|--|---|---------------------------|---|--|-----------------|------|---------------------|
| 3. Service Providers - Plantation Sector (excluding public sector) | Plantation companies, Tea exporting companies, Tea broke companies, Tea factories, etc. | Purposive Sampling method | Semi-structured questionnaires and interviews | Managers, tea factory owners, senior officials in the area of study, plantation company owners |                 | 0.05 | 30                  |
| 4. Service   | Hotel &   | Snowbal                   | Semi-   | Managers   |                 | 0.0  | 30                  |

|   |   |   |  |  |  |          |            |
|---|---|---|--|--|--|----------|------------|
| Providers<br>-Tourism<br>Sector<br>(excluding public<br>sector) | GH, TA,<br>transport<br>providers,<br>guides,<br>tour<br>operators,<br>restaurants<br>,<br>ecolodges,<br>golf<br>courses,<br>shops, etc.  | 1<br>Samplin<br>g<br>method               | structured<br>questionn<br>aires and<br>interview<br>s | , owners,<br>tour<br>planners,<br>respective<br>peoples in<br>the area<br>of study   |  | 5        |            |
| 5.Local<br>Communi<br>ty  | Villagers<br>in &<br>belongs to<br>the Tea<br>Plantation<br>s   | Multista<br>ge<br>cluster<br>samplin<br>g | Structure<br>d<br>Question<br>naires                   | Peoples in<br>the<br>selected<br>area  |  | 0.0<br>5 | 150        |
| 6.Scholar<br>s  | Universiti<br>es,<br>Academic<br>Institution<br>s related<br>to Tea &<br>Agricultur<br>e (NIPM)<br>Ecologists<br>,<br>Agrologist<br>s,<br>Scientists,<br>Environm<br>entalists,<br>Consultant<br>s,<br>Researche<br>rs,<br>NGO's<br>Economist<br>s,<br>Communit<br>y leaders<br>in the<br>respective<br>areas | Purposiv<br>e<br>samplin<br>g<br>method   | Semi-<br>structured<br>interview<br>s                  | Selected<br>scholars,<br>researche<br>rs,<br>Senior<br>officials<br>in the<br>research<br>institution<br>s,<br>Related<br>NGO's,<br>Communi<br>ty leaders<br>in<br>selected<br>areas |  |          | 30         |
| <b>Total</b>  |   |   |  |  |  |          | <b>673</b> |

## 2.4 Data Collection Method

### **2.4.1 Secondary Data**

Secondary data were obtained from the following sources to estimate the sample sizes, demand existing in the agriculture sector and also in the tea sector.

1. Annual Report & Research reports of Sri Lanka Tourist Board (SLTB)
2. Tea Board
3. Central Bank of Sri Lanka (CBSL)
4. Department of Census & Statistics (DCS)
5. WTO, PATA, WTTC

### **2.4.2 Primary Data**

The related primary data of the study were obtained during the month of December through specific surveys conducted for each stakeholders mentioned above.

To make the reliability of the data, pilot surveys were carried out by the researcher through specific questionnaires and interviews for each stakeholder categories and proper surveys were conducted by based on the observations of the above pilot surveys.

## **2.5 Data Analysis**

Throughout the study, related primary data were obtained from the field of the surveys and the quantitative data were analysed by Statistical Package for Social Science (SPSS) by applying various statistical tests. Content analysis was applied by grouping and summarizing of respective qualitative data with manual tabulations. Finally, SWOT analysis was applied with the discussions for the overall comparative assessment.

In the process of statistical analysis of the quantitative data, t-test, Analysis of Variance (ANOVA), were carried out as a statistical tool and which helped to check the level of significance of the survey findings to establish their reliability.

In addition to the above, the SPSS software was used by the researcher to analyze the satisfaction levels, perception levels and visitor ratings of the activities and resources mentioned in the questionnaires by using the Likert scale. This Likert scale was used to assess the above factors and the meaning of each assessed level ranged on interval level at 0.80 with five levels from the most interested/most satisfied/strongly agree to not interested/not satisfied/strongly disagree as follows:

| <b>Assessed level</b>            | <b>Opinion levels of respondents</b> |                 |
|----------------------------------|--------------------------------------|-----------------|
| 5<br>Satisfied/Strongly Agree    | Most                                 | Interested/Most |
| 4<br>Satisfied/Agree             | More                                 | Interested/More |
| 3                                | Interested/Satisfied/Not Sure        |                 |
| 2<br>Satisfied/Disagree          | Less                                 | Interested/Less |
| 1<br>Satisfied/Strongly Disagree | Not                                  | Interested/Not  |

All assessment ranging scales were analyzed by the descriptive statistics including frequency, percent and mean.

The analysis of mean which is based on the interval is calculated as follows:

$$\begin{aligned}
 \text{The interval level} &= (\text{Maximum}-\text{Minimum})/n \\
 &= (5-1)/5 \\
 &= 0.80
 \end{aligned}$$

Then, it as ranged the level of each assessment as follows:

| <b>Assessed levels<br/>by scores</b> | <b>Interval range</b> | <b>Meaning</b>                     | <b>determined</b> |
|--------------------------------------|-----------------------|------------------------------------|-------------------|
| 5<br>Important/Strongly Agree        | 4.21-5.00             | Most<br>Interested                 | /Most             |
| 4<br>Important/Agree                 | 3.41-4.20             | More<br>Interested/More            |                   |
| 3                                    | 2.61-3.40             | Interested/Important/Not Sure      |                   |
| 2                                    | 1.81-2.60             | Less Interested/Important/Disagree |                   |
| 1<br>Disagree                        | 1.00-1.80             | Not Interested/Important/Strongly  |                   |

Qualitative data plays a major role of any study to find out important findings of the study as well. As such, the Content Analysis and SWOT Analysis were applied to analysis of qualitative data of the study and which helped to researcher to state the respective recommendations to the study.

## **CHAPTER 3**

### **RESULTS**

This chapter illustrates the research findings where the researcher has found after analysing the quantitative and qualitative data throughout the whole research. There are six stakeholders' data are being considered as quantitative (five stakeholders) i.e. international visitors, local community in respective selected areas, tourism service providers, service providers in the plantation sector, public sector and other government authorities and qualitative (one stakeholder) i.e. researchers and scholars in this research. The analysis of quantitative and qualitative along with secondary data were used to identify the fulfil the research objectives i.e. to identify the existing problems, main challenges and reason behind them in tea-tourism development; to identify existing facilities, services and other products and the ways to find out value added things which the sector can offer for the visitors through tea-tourism; to identify the factors need to incorporate the tea-tourism into tourism sector; investigate market potential for tea-tourism in the development of agro-tourism segment in Sri Lanka; to identify the ways how community can benefit from tea-tourism. Finally, by combining the research findings at the end of this chapter, SWOT analysis was used to fulfil the sixth objective of the study i.e. to develop recommendations to the agro-tourism sector (including tea-tourism sector) and also the stakeholders for future development of tea-tourism to make better recommendation in the next chapter on tea-tourism sector.



## **3.1 The Findings**

### **3.1.1 International Visitors**

A survey was conducted at the Bandaranaike International Airport at Katunayaka, Colombo, Sri Lanka continuously for the period from 14<sup>th</sup> to 23<sup>rd</sup> December 2007 to collect data from the international visitors who were departing from Sri Lanka. Data were collected through the questionnaires by direct interviews conducted by the information assistants, competent with foreign languages such as German, Japanese, French and Chinese in addition to English language who are working for the Sri Lanka Tourism Development Authority (former Sri Lanka Tourist Board) under the supervision of the researcher. A sample of 403 international visitors was employed through the direct interviews to get the required information in connection with the related questionnaire and the same were analyzed at 0.05 (95%) level of confidence.

#### **3.1.1.1 Profile of International Visitors**

The International Visitor questionnaire comprises of four parts. The main objective of the part one was to examine the factors influencing tourists to visit Sri Lanka, places visited and activities done in each places including tea plantation areas with the level of satisfaction of visitors, type accommodation used and expenditure characteristics of visitors. Opinion of the tourists on agro-tourism resources and potential for tea-tourism were collected from part two and three of the questionnaire. The profile of the visitors was collected from the part four of the questionnaire and the Table 3.1 describes the profile of visitors those who interviewed at the airport. Table 3.1 shows that a major proportion of visitors accounted for male (68.2%) from international visitors. The age category of 21-30 yrs shows the

highest proportion (28.5%) of tourists followed by the age category 31-40 yrs (27.3%) visited to Sri Lanka.

The majority of the visitor travelled to Sri Lanka (36.7%) have a bachelor degree followed by the second highest having the educational qualification category as Post Graduate Degree (32.8%). In other words this shows that the more than 69.5% of the visitors travelled to Sri Lanka has at least bachelor's degree followed by 21.6 % having a Diploma. The occupational category shows that highest proportion of visitors (32%) employed as Professional workers as their employment followed by Educationalist (9.7%) and Retired (9.7%) occupational category. In other words nearly one-third (1/3) of the visitors travelled to Sri Lanka were Professional workers as their employment. It was noted that forty one percent (41%) of the visitors travelled to Sri Lanka represent under the income category between US\$1,000-US\$ 3,000. In other words, more than four-fifth (4/5) of the visitors travelled to Sri Lanka earn at least US\$ 1,000 per month as their income status.

**Table 3.1** Profile of the International Visitors

| <b>Gender</b>   | <b>Number</b> | <b>(%)</b>   | <b>Previous Visit</b>                | <b>Number</b> | <b>(%)</b>   |
|---|---------------|--------------|--------------------------------------|---------------|--------------|
| Male  | 275           | 68.2         | Yes                                  | 149           | 37.0         |
| Female  | 128           | 31.8         | No                                   | 254           | 63.0         |
| <b>Age</b>  |               |              | <b>Occupation</b>                    |               |              |
| Less than 20 ys   | 15            | 3.7          | Self employee                        | 29            | 7.2          |
| 21-30 ys  | 115           | 28.5         | Govt. Employee                       | 32            | 7.9          |
| 31-40 ys  | 110           | 27.3         | Private employee                     | 29            | 7.2          |
| 41-50 ys  | 66            | 16.4         | Professional                         | 129           | 32.0         |
| 51-60 ys  | 59            | 14.6         | Retired                              | 39            | 9.7          |
| Over 60 ys  | 38            | 9.4          | Scientists                           | 1             | 0.2          |
| <b>Education Qualifications</b>                               |               |              | Executive                            | 39            | 9.7          |
| Primary or less   | 1             | 0.2          | Educationalist                       | 7             | 1.7          |
| Secondary   | 35            | 8.7          | Business                             | 31            | 7.7          |
| Diploma   | 87            | 21.6         | No occupation                        | 11            | 2.73         |
| Bachelor  | 148           | 36.7         | Technical                            | 29            | 7.2          |
| Post Graduate   | 132           | 32.8         | Others                               | 27            | 6.7          |
| <b>Monthly Income</b>   |               |              | <b>Duration of Stay in Sri Lanka</b> |               |              |
|   | <b>Number</b> | <b>(%)</b>   |                                      | <b>Number</b> | <b>(%)</b>   |
| Less than US\$ 1,000  | 69            | 18.0         | 1-5 Nights                           | 42            | 10.4         |
| US\$1,000-3,000US\$   | 157           | 41.0         | 6 -10 Nights                         | 215           | 53.3         |
| US\$3,000-5,000   | 54            | 14.1         | 11 -15 Nights                        | 136           | 33.7         |
| US\$5,000-7,000   | 56            | 14.4         | Over 15 Nights                       | 10            | 2.5          |
| More than US\$7,000   | 47            | 12.3         |                                      |               |              |
| <b>Total</b>  | <b>403</b>    | <b>100.0</b> | <b>Total</b>                         | <b>403</b>    | <b>100.0</b> |
| <b>Estimated average duration of stay by foreign tourists</b> |               |              |                                      |               | <b>9.57</b>  |

The 53.3% of visitors stayed between 6-10 nights, whilst 33.7% stayed between 11-15 nights, 10.4% stayed between 1-5 nights and 2.5% stayed for more than 15 nights during their stay in Sri Lanka. The average duration of stay of the visitors recorded as 9.57. In other words more than half of the visitors travelled to Sri Lanka stayed between 6-10 nights during their stay.

Table 3.1 shows that nearly 37% of visitors travelled to Sri Lanka were repeat visitors. Table 3.2 shows that nearly 32% of the visitors who have come to Sri Lanka prior to this visit made four or more visits followed by 27% of the visitors made one visit and also two visits from their previous visits. In other words, more than one-fourth (1/4) of the repeat visitors travelled to Sri Lanka were recorded as two times.

**Table 3.2** Repeat Visits of International Visitors

| Number of Visits | Number     | (%)        |
|------------------|------------|------------|
| 1 visits         | 41         | 27         |
| 2 visits         | 40         | 27         |
| 3 visits         | 21         | 14         |
| 4 or more visits | 47         | 32         |
| <b>Total</b>     | <b>149</b> | <b>100</b> |

Table 3.3 shows that, 35.2% of visitors have travelled with their spouse while 29.8% travelled with relatives and/or friends, 26.3% alone, 2.5% with spouse and children and the balanced 6.2% with others.

**Table 3.3** Travel Companions

| Travel Party                  | Number     | (%)        |
|-------------------------------|------------|------------|
| Alone                         | 106        | 26.3       |
| With spouse only              | 142        | 35.2       |
| With relatives and/or friends | 120        | 29.8       |
| With spouse & children        | 10         | 2.5        |
| Others                        | 25         | 6.2        |
| <b>Total</b>                  | <b>403</b> | <b>100</b> |

### **3.1.1.2 Visitor Preferences, Activities & Expenditures**

Table 3.4 describes that a major proportion of the respondents (83.9%) indicated their main purpose of visit as Holiday or Vacation or Leisure. Further categorization of activities revealed that 7.4% came for Business, 4.5% for other purposes, 2.5% for Visiting Friends & Relatives (VFR) and 1.7% for MICE activities.

Table 3.4 describes that the special interests under the main three components i.e. “Seeing”, “Being” and “Doing” of the visitors travelled as a Holiday/Vacation/Leisure as their main purpose of visit to Sri Lanka. A major proportion of respondents travelled under the Holiday/Vacation/Leisure shows that their special interest under this category to visit Sri Lanka for Nature & Sceneries (53.3%), 52.1% of respondents declared their special interest of visit was Sun & Beaches, 49.6% for Culture & Heritage, 30.8% for Shopping, 20.8% for Wildlife Safaris, etc.

The table 3.4 explain that 33.5% of visitors came to Sri Lanka visited Tea Plantation areas. Among the places visited by tourists, Colombo was ranked as number one with 79.4% while Kandy (67.2%), beaches in the South of Sri Lanka (40.4%), Elephant Orphanage in Pinnawala (38.5%), Sigiriya/Dambulla (38.2%) and Nuwara Eliya (32.8%) were recorded as second, third, fourth and fifth highest interested places rated by the visitors respectively.

**Table 3.4** Main Purpose of Visits

| Main purpose of visit    | Number     | (%)        | Visit of Tea Plantations | Number     | (%)          |
|--------------------------|------------|------------|--------------------------|------------|--------------|
| Holiday/Vacation/Leisure | 338        | 83.9       | Visited<br>Not Visited   | 135<br>268 | 33.5<br>66.5 |
| Business                 | 30         | 7.4        |                          |            |              |
| MICE                     | 7          | 1.7        |                          |            |              |
| VFR                      | 10         | 2.5        |                          |            |              |
| Others                   | 18         | 4.5        |                          |            |              |
| <b>Total</b>             | <b>403</b> | <b>100</b> | <b>Total</b>             | <b>403</b> | <b>100.0</b> |

**Table 3.4** (Continued)

| Special Interests   |            |      | Places Visited in Sri Lanka | Number     | (%)  |
|---------------------|------------|------|-----------------------------|------------|------|
| <b>Seeing</b>       |            |      | Kandy                       | 271        | 67.2 |
| Sun & Beaches       | 210        | 52.1 | Nuwara Eliya                | 132        | 32.8 |
| Culture & heritage  | 200        | 49.6 | Horton Plains               | 25         | 6.2  |
| Wildlife Safaris    | 84         | 20.8 | Bandarawela                 | 18         | 4.5  |
| Nature & Sceneries  | 215        | 53.3 | Anuradhapura                | 41         | 10.2 |
| VFR                 | 30         | 7.4  | Polonnaruwa                 | 65         | 16.1 |
| Cricket             | 36         | 8.9  | Sigiriya/Dambulla           | 154        | 38.2 |
| <b>Being</b>        |            |      | East Coast                  | 6          | 1.5  |
| Ayurvedic treatment | 52         | 12.9 | Colombo City                | 320        | 79.4 |
| <b>Doing</b>        |            |      | Beaches in South            | 163        | 40.4 |
| Sports & Adventure  | 18         | 4.5  | National Parks              | 64         | 15.9 |
| Water Sports        | 28         | 6.9  | Elephant Orphanage          | 155        | 38.5 |
| Shopping            | 124        | 30.8 | Botanical Gardens           | 113        | 28   |
| Honeymoon           | 7          | 1.7  | Other places                | 42         | 10.4 |
| Other interest      | 31         | 7.7  |                             |            |      |
| <b>Total</b>        | <b>403</b> |      | <b>Total</b>                | <b>403</b> |      |

Table 3.5 describes the international tourists who have visited Tea Plantation areas by respective country of residence. The highest amount of visitors (86%) visited to tea plantations by the visitors from Netherlands, followed by 75% by Japan, 74% by Australia, 71% by Switzerland, 70% by Scandinavian countries, 67% by Italy and 60% by Canada.

**Table 3.5** Tourists Visited to Tea Plantation Areas by Country of Residence

| Country of Residence            | Visited Tea Plantations | Visitors in The Sample | Visited Tea Plantations (%) |
|---------------------------------|-------------------------|------------------------|-----------------------------|
| <b>Americas &amp; Caribbean</b> | <b>10</b>               | <b>19</b>              | <b>53</b>                   |
| Canada                          | 6                       | 10                     | 60                          |
| USA                             | 4                       | 9                      | 44                          |
| <b>Western Europe</b>           | <b>77</b>               | <b>166</b>             | <b>46</b>                   |
| UK                              | 21                      | 64                     | 33                          |
| Germany                         | 19                      | 33                     | 58                          |

**Table 3.5** (Continued)

| Country of Residence   | Visited Tea Plantations | Visitors in The Sample | Visited Tea Plantations (%) |
|------------------------|-------------------------|------------------------|-----------------------------|
| France                 | 1                       | 16                     | 6                           |
| Netherlands            | 12                      | 14                     | 86                          |
| Italy                  | 6                       | 9                      | 67                          |
| Switzerland            | 5                       | 7                      | 71                          |
| Scandinavian countries | 7                       | 10                     | 70                          |
| Other_West Europe      | 6                       | 13                     | 46                          |
| <b>Eastern Europe</b>  | <b>6</b>                | <b>10</b>              | <b>60</b>                   |
| Russia                 | 4                       | 6                      | 67                          |
| Other_East Europe      | 2                       | 4                      | 50                          |
| <b>Middle East</b>     | <b>4</b>                | <b>11</b>              | <b>36</b>                   |
| <b>Africa</b>          | <b>1</b>                | <b>2</b>               | <b>*</b>                    |
| South Africa           | 0                       | 1                      | 0                           |
| Other_Africa           | 1                       | 1                      | *                           |
| <b>Asia</b>            | <b>23</b>               | <b>176</b>             | <b>13</b>                   |

|                  |            |            |             |
|------------------|------------|------------|-------------|
| India            | 6          | 86         | 7           |
| Maldives         | 2          | 18         | 11          |
| Japan            | 9          | 12         | 75          |
| Malaysia         | 1          | 11         | 9           |
| Singapore        | 0          | 5          | 0           |
| Pakistan         | 2          | 8          | 25          |
| China            | 1          | 12         | 8           |
| Other_Asia       | 2          | 24         | 8           |
| <b>Austrasia</b> | <b>14</b>  | <b>19</b>  | <b>74</b>   |
| Australia        | 14         | 19         | 74          |
| <b>Total</b>     | <b>135</b> | <b>403</b> | <b>33.4</b> |

**Remark:** \* - Not sufficient data

Table 3.6 shows that the 83.7% of the tourists who visited to Tea plantation areas are visited to see tea plantations in Nuwara Eliya followed by 23% in Kandy and 4.4% in Bandarawela.

The activities done by international visitors in tea plantations were: visiting sightseeing (97%), “Tasting Ceylon Tea” (97%), “Visiting tea factories” (94.8%), “Exploring & learning about tea” (94.8%), “Visiting tea shops” (94.1%), “Visiting souvenir shops” 93.3%), “Visiting to see tea plucking & processing” (89.6%), “Exploring rural life style” (77.8%), “Trekking tea plantations” (73.3%) and “Cycling” (9.6%).



**Table 3.6** Visitors' Interests in Tea Plantation Areas

| <b>Tea Plantation Visited</b>                                       | <b>Total</b> | <b>(%)</b> |
|---|--------------|------------|
| Kandy   | 31           | 23         |
| Nuwara Eliya  | 113          | 83.7       |
| Bandarawela   | 6            | 4.4        |
| Horton Plains   | 1            | 0.7        |
| Hatton  | 1            | 0.7        |
| Other areas   | 1            | 0.7        |
| <b>Activities Done by International Visitors in Tea Plantations</b> |              |            |
| Visiting sightseeing  | 131          | 97.0       |
| Visiting Tea shops  | 127          | 94.1       |
| Visiting tea factories  | 128          | 94.8       |
| Visiting to souvenir shops  | 126          | 93.3       |
| Trekking tea plantations  | 99           | 73.3       |
| Tasting Ceylon tea  | 131          | 97.0       |
| Visiting to see tea plucking & processing                           | 121          | 89.6       |
| Exploring & learning  | 128          | 94.8       |
| Exploring rural life style  | 105          | 77.8       |
| Cycling   | 13           | 9.6        |

According to the results of investigation from Table 3.7, it describe that the visitors' satisfaction levels of the activities they performed during their visiting to tea plantations. In order to find out the scale for the satisfaction levels as per the Likert scale, a Mean was calculated for each activity mentioned in the table. Since the "Visiting sightseeing" shows the highest Mean value (Mean=4.37) from other activities, it has a greater satisfaction level than other activities at "Most Satisfies" level. Similarly, other interested activities among visitors visited tea plantations for "Visiting Tea Factories" (Mean= 4.30) and "Tasting Ceylon Tea" (Mean is 4.26), were rated at "Most

Satisfied” level. The activity “Exploring & Learning” (Mean= 4.10), “Visiting to see tea plucking & tea processing” (Mean=4.06), “Trekking tea plantations” (Mean= 3.75), “Exploring rural life style” (Mean= 3.66) and “Visiting tea shops” (Mean= 3.65) were rated at “More Satisfied” level while activity “Visiting to souvenir shops” (Mean=2.87) and “Cycling” (Mean=2.54) were rated as “Satisfied” level and “Less Satisfied” level respectively.

**Table 3.7** Tourists’ Satisfaction by Activities

| <b>Activity</b>                           | <b>Mean Value</b> | <b>S.D.</b> | <b>Level of Satisfaction</b> |
|---|-------------------|-------------|------------------------------|
| Visiting sightseeing                      | <b>4.37</b>       | 0.97        | Most Satisfied.              |
| Visiting tea factories                    | 4.30              | 1.19        | Most Satisfied               |
| Visiting Tea shops                        | 3.65              | 0.82        | More Satisfied               |
| Tasting Ceylon tea                        | 4.26              | 0.95        | Most Satisfied               |
| Exploring & learning                      | 4.10              | 1.12        | More Satisfied               |
| Visiting to see tea plucking & processing | 4.06              | 0.92        | More Satisfied               |
| Trekking tea plantations                  | 3.75              | 1.07        | More Satisfied               |
| Exploring rural life style                | 3.66              | 0.91        | More Satisfied               |
| Visiting to souvenir shops                | 2.87              | 1.03        | Satisfied                    |
| Cycling                                   | 2.54              | 1.31        | Less Satisfied               |

Table 3.8 describe that the visitors’ interesting levels of interesting places they enjoyed in the tea plantations. In order to find out the scale for the satisfaction levels Mean was

calculated for each place mentioned in the table. Though the Mean values related to the Hatton and Bandarawela accounted high value it will not reflect the reality because those places have been visited by low number of visitors in the most interested level. Therefore, since the highest Mean value (4.71) was accounted by Nuwara Eliya area will reflect the most interested place during their enjoyment in tea plantation area at “Most Interested” level. Though the next highest Mean value related to the Horton Plains, it will not reflect the reality because this place have been visited by considerably low number of visitors, hence the Kandy represents having the next highest Mean value (4.41) rated at “Most Interested” level as a scale of satisfaction levels after Nuwara Eliya within the tea plantation areas those who have visited.

**Table 3.8** Interesting Places Enjoyed in the Tea Plantations

| Places        | Mean Value  | S.D. | Level of Interest |
|---------------|-------------|------|-------------------|
| Kandy         | 4.41        | 0.80 | Most Interested   |
| Nuwara Eliya  | <b>4.71</b> | 0.54 | Most Interested   |
| Hatton        | 5           | *    |                   |
| Bandarawela   | 5           | *    |                   |
| Horton Plains | 4.5         | *    |                   |

**Remarks:** \* - Not adequate data

Table 3.9 reflects the type of accommodation used by the visitors during their staying in the plantation areas in Sri Lanka. As shown in the Table 3.10, 79.5% of visitors stayed at hotels while 7.7% at private accommodation places, 6.8% at Tea Plantation Bungalows and 6.0% at Guest Houses.

**Table 3.9** Accommodation of International Visitors during their Staying in Tea Plantations

| <b>Accommodation Category</b> | <b>Number</b> | <b>(%)</b> |
|-------------------------------|---------------|------------|
| Tea Plantation Bungalow       | 8             | 6.8        |
| Private Accommodation         | 9             | 7.7        |
| Hotel                         | 93            | 79.5       |
| Guest House                   | 7             | 6.0        |
| <b>Total</b>                  | <b>117</b>    | <b>100</b> |

### **3.1.1.3 Tourist Perception and Agro-tourism Resources**

Based on the experiences of the visitors those who visited tea plantation area, visitors were asked to assess certain characteristics of tourism resources related to tea-tourism which shows in the Table 3.10. According to the results reflected in the Table 3.10, the following characteristics have been rated by the visitors as “Strongly Agree” level as per their perception on tourism resources related to tea-tourism: “Sri Lanka has many nature attractions/places” (Mean = 4.96); “Good place as a honeymoon destination” (Mean = 4.27); “Climatic condition in hill country is unique” (Mean=4.21); “ I am happy with the environment in tea plantation” (Mean=4.24); “ Taste of the Ceylon Tea is extremely good” (Mean=4.4); “I am happy with the services of the hotel staff” (Mean=4.38); “Guides/Interpreters have a good knowledge” (Mean=4.27) and “I enjoyed a lot in tea plantation area” (Mean=4.23).

The following characteristics were rated by visitors as “Agree” level as per their perception on tourism resources related to tea-tourism: “Safe as a travel destination” (Mean=3.78); “Good place to take children” (Mean=3.81); “I am happy with the activities done in the tea plantation” (Mean=4.04); “I am happy with the tor package to tea plantations” (Mean=4.11); “Tour package include every thing in tea plantations” (Mean=3.58); “Quality of accommodation in

hill country is good” (Mean=4.19); “I am happy with the cleanliness of tea plantation area” (Mean=4.05); “Many agro products available in tea plantation area” (Mean=3.72); “Visiting tea factories is fascinates” (Mean=4.05); “There is enough information in hill country areas” (Mean=3.59); “I am happy with the services in the tea plantations” (Mean=4.03) and “I would like to visit tea plantations again for holiday” (Mean=4.15).

The following characteristics were rated by visitors as “Not Sure” as per their perception on the respective areas in connection with tea-tourism: “Has high degree of accessibility by roads” (Mean=3.33); “I am happy with the road system to hill country” (Mean=3.24) and “Mass tourism disturbs the nature in Sri Lanka” (Mean=3.15).

**Table 3.10** Assessment of Existing Tea-tourism Resources by International Tourists

| <b>Key Factors</b>   | <b>Mean</b> | <b>S.D.</b> | <b>Level of Agreement</b> |
|--|-------------|-------------|---------------------------|
| Sri Lanka has many nature attractions/places               | 4.96        | 0.20        | Strongly Agree            |
| Hill country has unique natural sceneries                  | 4.60        | 0.81        | Strongly Agree            |
| Taste of “Ceylon Tea” is extremely good                    | 4.40        | 0.59        | Strongly Agree            |
| Happy with the services of the hotel staff                 | 4.38        | 0.87        | Strongly Agree            |
| Good place as a honeymoon destination                      | 4.27        | 0.64        | Strongly Agree            |
| Guides/Interpreters have a good knowledge                  | 4.27        | 0.66        | Strongly Agree            |
| I am happy with the environment in tea plantations         | 4.24        | 0.61        | Strongly Agree            |
| Enjoyed a lot in tea plantation areas                      | 4.23        | 0.72        | Strongly Agree            |
| Climatic conditions in hill country is unique              | 4.21        | 0.69        | Strongly Agree            |
| Quality of accommodation in hill country is good           | 4.19        | 0.63        | Agree                     |
| I would like to visit tea plantations again for holiday    | 4.15        | 0.91        | Agree                     |
| I am happy with the tour package to tea plantations        | 4.11        | 0.92        | Agree                     |
| Happy with the cleanliness of plant. area                  | 4.05        | 0.98        | Agree                     |
| Visiting of tea factories is fascinates                    | 4.05        | 1.08        | Agree                     |
| I am happy with the activities done in the tea plantations | 4.04        | 0.50        | Agree                     |
| Happy with the services in the tea                         | 4.03        | 0.79        | Agree                     |

|  |      |      |          |
|--|------|------|----------|
| plantations  |      |      |          |
| Good place to take children                          | 3.81 | 0.82 | Agree    |
| Safe as a travel destination                         | 3.78 | 0.96 | Agree    |
| Many agro products are available in tea plant. area  | 3.72 | 0.68 | Agree    |
| Enough information in hill country areas             | 3.59 | 0.68 | Agree    |
| Tour package included every thing in tea plantations | 3.58 | 0.73 | Agree    |
| Has a high degree of accessibility by roads          | 3.33 | 0.88 | Not Sure |
| Happy with the road system to hill country           | 3.24 | 0.92 | Not Sure |
| Mass tourism disturbs the nature in Sri Lanka        | 3.15 | 1.05 | Not Sure |

### **Statistical Comparisons of Perception Levels Indicators between “Gender” of the Respondents on Resources in Tea-tourism Areas:**

The analysis in the Table 3.11 describes the comparisons of Mean scores among visitors those who has rated their perception on resources in tea plantation areas by their gender. The test result of independent samples t-test was used to indicate the significant differences among genders and key indicators of the study.

Male respondents had highest positive thinking (Mean=4.53) on “Taste of Ceylon Tea is extremely good”. There was statistically significant difference between male and female respondents. Furthermore, factors, “Safe as a travel destination”, “Has a high degree of accessibility by roads”, “I am happy with the activities done in the tea plantations”, “I am happy with the tour package to tea plantations”, “Tour package

included every thing in tea plantations”, “Guides/Interpreters have a good knowledge” , happy with the cleanliness of plantation areas and happy with the services in the tea plantations indicated that statistically significant difference between the male and female at 95% confidence level and at 5% error. All nine factors mentioned above reflected that male having more agreeable value than female respondents.

**Table 3.11** Assessment of Existing Tea-tourism Resources by International Tourists by Gender

| Key Factors  | Gender (Mean) |        | t-Test  |         |
|--|---------------|--------|---------|---------|
|  | Male          | Female | t-value | p-value |
| Sri Lanka has many nature attractions/places               | 4.75          | 4.62   | -1.663  | 0.99    |
| Safe as a travel destination                               | 4.01          | 3.47   | -4.182  | 0.00*   |
| Has a high degree of accessibility by roads                | 3.48          | 3.12   | -2.222  | 0.028*  |
| Good place to take children                                | 3.83          | 3.78   | -0.385  | 0.701   |
| Good place as a honeymoon destination                      | 4.26          | 4.29   | 0.252   | 0.801   |
| Hill country has unique natural sceneries                  | 4.62          | 4.57   | -0.519  | 0.604   |
| Climatic conditions in hill country is unique              | 4.14          | 4.29   | 1.031   | 0.304   |
| I am happy with the environment in tea plantations         | 4.27          | 4.21   | -0.701  | 0.484   |
| I am happy with the activities done in the tea plantations | 4.12          | 3.93   | -2.176  | 0.031*  |
| I am happy with the tour package to tea plantations        | 4.29          | 3.86   | -3.658  | 0.00*   |



**Table 3.11** (Continued)

| Key Factors   | Gender (Mean) |        | t-Test  |         |
|---|---------------|--------|---------|---------|
|   | Male          | Female | t-value | p-value |
| Tour package included every thing in tea plantations    | 3.78          | 3.31   | - 2.845 | 0.005*  |
| Taste of “Ceylon Tea” is extremely good                 | 4.53          | 4.22   | - 2.751 | 0.007*  |
| Quality of accommodation in hill country is good        | 4.20          | 4.19   | - 0.070 | 0.944   |
| Happy with the services of the hotel staff              | 4.46          | 4.28   | - 1.888 | 0.061   |
| Guides/Interpreters have a good knowledge               | 4.49          | 4.00   | - 3.060 | 0.003*  |
| Happy with the cleanliness of plant. Area               | 4.17          | 3.9    | - 2.191 | 0.030*  |
| Many agro products are available in tea plant. Area     | 3.81          | 3.61   | - 1.272 | 0.205   |
| Visiting of tea factories is fascinates                 | 4.05          | 4.05   | - 0.002 | 0.999   |
| Happy with the road system to hill country              | 3.30          | 3.17   | - 0.646 | 0.520   |
| Enough information in hill country areas                | 3.64          | 3.53   | - 0.857 | 0.393   |
| Happy with the services in the tea plantations          | 4.13          | 3.90   | - 2.335 | 0.021*  |
| Mass tourism disturbs the nature in Sri Lanka           | 3.18          | 3.12   | - 0.296 | 0.768   |
| Enjoyed a lot in tea plantation areas                   | 4.31          | 4.12   | - 1.654 | 0.100   |
| I would like to visit tea plantations again for holiday | 4.14          | 4.17   | 0.213   | 0.831   |

**Remarks:** \* Indicates “Statistically Significant” differences between gender at  $p \leq 0.05$

### **Statistical Comparisons of Perception Levels Indicators Among “Age group” of the Respondents on Resources in Tea-tourism Areas:**

The analysis in the Table 3.12 describes the comparisons of Mean Scores among visitors those who has rated their perception on resources in tea plantation areas by their Age group. The test result of One-way ANOVA was used to indicate the significant differences among age groups and key indicators of the study.

This analysis showed that the indicators, “Sri Lanka has many nature attractions/places”, “Good place as a honeymoon destination”, “Climatic conditions in hill country is unique”, “I am happy with the environment in tea plantations”, “I am happy with the activities done in the tea plantations”, “I am happy with the tour package to tea plantations”, “Tour package included every thing in tea plantations”, “Happy with the services of the hotel staff”, “Many agro products are available in tea plant. Area”, “Happy with the road system to hill country” and “Enough information in hill country areas” indicated statistically significant difference among the age groups.

**Table 3.12** Assessment of Existing Tea-tourism Resources by International Tourists by Age Group

| Ref. No. | Age Group (Mean Value) |         |             |             |             | ANOVA    |          |
|----------|------------------------|---------|-------------|-------------|-------------|----------|----------|
|          | (21-30)                | (31-40) | (41-50)     | (51-60)     | Over 60     | F- value | p- value |
| 1.       | 4.79                   | 4.54    | 4.48        | <b>4.96</b> | 4.92        | 6.855    | 0.00*    |
| 2.       | 3.90                   | 3.46    | 3.86        | 3.88        | 4.08        | 2.432    | 0.051    |
| 3.       | 3.21                   | 3.33    | 3.03        | 3.68        | 3.38        | 2.214    | 0.071    |
| 4.       | 3.72                   | 3.64    | 3.79        | 4.16        | 3.85        | 1.657    | 0.164    |
| 5.       | 4.28                   | 4.18    | 4.10        | <b>4.68</b> | 4.15        | 2.505    | 0.045*   |
| 6.       | 4.66                   | 4.41    | 4.66        | 4.84        | 4.46        | 2.355    | 0.057    |
| 7.       | 3.76                   | 4.33    | 4.14        | <b>4.56</b> | 4.31        | 3.790    | 0.006*   |
| 8.       | 4.10                   | 4.41    | 4.17        | 4.12        | <b>4.46</b> | 2.518    | 0.044*   |
| 9.       | 3.97                   | 3.92    | <b>4.28</b> | 4.13        | 3.85        | 3.169    | 0.016*   |
| 10.      | 4.19                   | 3.77    | 4.22        | <b>4.29</b> | 4.20        | 2.966    | 0.023*   |
| 11.      | 3.56                   | 3.68    | 3.15        | 3.75        | <b>4.29</b> | 3.118    | 0.018*   |
| 12.      | 4.59                   | 4.41    | 4.21        | 4.52        | 4.15        | 1.908    | 0.113    |
| 13.      | 4.28                   | 4.21    | 4.10        | 4.36        | 3.83        | 1.724    | 0.149    |
| 14.      | <b>4.63</b>            | 4.28    | 4.28        | 4.52        | 4.08        | 3.348    | 0.012*   |
| 15.      | 4.33                   | 4.21    | 3.97        | 4.63        | 4.40        | 1.846    | 0.124    |
| 16.      | 4.03                   | 4.15    | 3.86        | 4.08        | 4.17        | 0.765    | 0.550    |
| 17.      | <b>3.97</b>            | 3.87    | 3.28        | 3.71        | 3.77        | 2.997    | 0.021*   |
| 18.      | 3.93                   | 4.08    | 3.90        | 4.36        | 4.00        | 1.956    | 0.105    |
| 19.      | 3.31                   | 3.23    | 2.52        | <b>3.88</b> | 3.54        | 6.099    | 0.00*    |
| 20.      | 3.59                   | 3.62    | 3.21        | <b>4.00</b> | 3.62        | 5.101    | 0.001*   |
| 21.      | 4.17                   | 4.08    | 3.79        | 4.12        | 3.91        | 1.973    | 0.102    |
| 22.      | 3.00                   | 3.36    | 2.93        | 3.08        | 3.60        | 1.225    | 0.303    |
| 23.      | 4.24                   | 4.31    | 4.07        | 4.36        | 4.08        | 0.960    | 0.432    |
| 24.      | 4.24                   | 4.31    | 3.79        | 4.36        | 3.80        | 1.886    | 0.117    |

**Remarks:** \* Indicates statistically significant differences between Age groups at  $p \leq 0.05$

| <b>Ref. No.</b> | <b>Attribute</b>   | <b>Ref. No</b> | <b>Attribute</b>                                    |
|-----------------|--|----------------|---|
| <b>1</b>        | Sri Lanka has many nature attractions/places               | <b>2</b>       | Safe as a travel destination;                       |
| <b>3</b>        | Has a high degree of accessibility by roads;               | <b>4</b>       | Good place to take children                         |
| <b>5</b>        | Good place as a honeymoon destination                      | <b>6</b>       | Hill country has unique natural sceneries           |
| <b>7</b>        | Climatic conditions in hill country is unique              | <b>8</b>       | I am happy with the environment in tea plantations  |
| <b>9</b>        | I am happy with the activities done in the tea plantations | <b>10</b>      | I am happy with the tour package to tea plantations |
| <b>11</b>       | Tour package included everything in tea plantations        | <b>12</b>      | Taste of “Ceylon Tea” is extremely good             |
| <b>Ref. No.</b> | <b>Attribute</b>   | <b>Ref. No</b> | <b>Attribute</b>                                    |
| <b>15</b>       | Guides/Interpreters have a good knowledge                  | <b>16</b>      | Happy with the cleanliness of tea plantation area   |
| <b>17</b>       | Many agro products are available in tea plantation area    | <b>18</b>      | Visiting of tea factories is fascinates             |
| <b>19</b>       | Happy with the road system to hill country                 | <b>20</b>      | Enough information in hill country areas            |
| <b>21</b>       | Happy with the services in the tea plantations             | <b>22</b>      | Mass tourism disturbs the nature in Sri Lanka       |
| <b>23</b>       | Enjoyed a lot in tea plantation areas                      | <b>24</b>      | I would like to visit tea plantations for holiday   |

### **Statistical Comparisons of Perception Levels Indicators among “Monthly Income” of the Respondents on Resources in Tea-tourism Areas:**

The analysis in the Table 3.13 describes the comparisons of Mean scores among visitors those who has rated their perception on resources in tea plantation areas by their monthly income. The test result of One-way ANOVA was used to indicate the significant differences among monthly income and key indicators of the study.

This analysis showed that the indicators, “Safe as a travel destination”, “Has a high degree of accessibility by roads”, “Good place to take children”, “Good place as a honeymoon destination”, “Hill country has unique natural sceneries”, “Climatic conditions in hill country is unique”, “I am happy with the environment in tea plantations” and “Happy with the road system to hill country” indicated statistically significant difference among the monthly income of the respondents.

**Table 3.13** Assessment of Existing Tea-tourism Resources by Monthly Income of Visitors

| Ref. No. | Income Levels (Mean Value) |                    |                   |                   |                      | ANOVA   |         |
|----------|----------------------------|--------------------|-------------------|-------------------|----------------------|---------|---------|
|          | <1,000US\$                 | (1,000-3,000) US\$ | (3,000-5,000)US\$ | (5,000-7,000)US\$ | More than 7,000 US\$ | F-value | p-value |
| 1.       | <b>5.00</b>                | <b>4.68</b>        | <b>4.84</b>       | <b>4.53</b>       | <b>4.65</b>          | 1.573   | 0.185   |
| 2.       | 3.38                       | 3.82               | 3.74              | 3.33              | 3.74                 | 3.547   | 0.009*  |
| 3.       | 3.00                       | 3.49               | 3.58              | 2.87              | 2.96                 | 2.993   | 0.021*  |
| 4.       | 3.60                       | 3.84               | <b>4.26</b>       | 3.93              | 3.30                 | 4.139   | 0.003*  |
| 5.       | 4.00                       | <b>4.34</b>        | <b>4.47</b>       | <b>4.47</b>       | 3.83                 | 3.076   | 0.019*  |
| 6.       | <b>5.00</b>                | <b>4.68</b>        | <b>4.26</b>       | <b>4.60</b>       | <b>4.52</b>          | 2.630   | 0.037*  |
| 7.       | 2.60                       | <b>4.27</b>        | <b>4.42</b>       | <b>4.07</b>       | <b>4.26</b>          | 5.900   | 0.000*  |
| 8.       | 4.20                       | 4.12               | 4.11              | <b>4.60</b>       | <b>4.52</b>          | 4.915   | 0.001*  |

**Table 3.13 (Continued)**

| Ref. No. | Income Levels (Mean Value) |                    |                   |                   |                      | ANOVA   |         |
|----------|----------------------------|--------------------|-------------------|-------------------|----------------------|---------|---------|
|          | <1,000US\$                 | (1,000-3,000) US\$ | (3,000-5,000)US\$ | (5,000-7,000)US\$ | More than 7,000 US\$ | F-value | p-value |
| 9.       | 4.00                       | 4.01               | 4.05              | 4.07              | 4.09                 | 0.115   | 0.977   |
| 10.      | 4.00                       | 4.15               | <b>4.21</b>       | 3.80              | 4.15                 | 1.030   | 0.395   |
| 11.      | 3.75                       | 3.50               | 3.58              | 3.60              | 3.75                 | 0.319   | 0.865   |
| 12.      | <b>4.40</b>                | <b>4.30</b>        | <b>4.32</b>       | <b>4.60</b>       | <b>4.65</b>          | 1.703   | 0.153   |
| 13.      | 4.20                       | 4.19               | 4.00              | 4.20              | <b>4.35</b>          | 0.786   | 0.536   |
| 14.      | 4.20                       | <b>4.41</b>        | <b>4.21</b>       | <b>4.33</b>       | <b>4.48</b>          | 0.829   | 0.509   |
| 15.      | 4.20                       | 4.16               | <b>4.63</b>       | <b>4.47</b>       | 4.17                 | 1.191   | 0.318   |
| 16.      | 4.20                       | 4.06               | 3.79              | 4.20              | 4.13                 | 0.887   | 0.474   |
| 17.      | 3.80                       | 3.57               | 4.11              | 3.73              | 3.87                 | 1.719   | 0.150   |
| 18.      | 4.00                       | 4.00               | 4.11              | 4.07              | 4.17                 | 0.320   | 0.864   |
| 19.      | 4.20                       | 3.37               | 3.84              | 2.87              | 2.39                 | 7.415   | 0.000*  |
| 20.      | 3.60                       | 3.62               | 3.89              | 3.60              | 3.26                 | 2.402   | 0.053   |
| 21.      | 4.20                       | 3.92               | 4.11              | 4.07              | <b>4.26</b>          | 1.789   | 0.135   |
| 22.      | 3.40                       | 3.10               | 3.05              | 3.53              | 3.09                 | 0.603   | 0.661   |
| 23.      | 4.20                       | <b>4.27</b>        | 4.00              | 4.20              | <b>4.30</b>          | 0.716   | 0.582   |
| 24.      | 4.00                       | 4.09               | <b>4.63</b>       | 4.13              | 4.00                 | 1.369   | 0.249   |

**Remarks:** \* Indicates statistically significant differences between income groups at  $p \leq 0.05$

| Re<br>f.<br>No. | Attribute  | Re<br>f.<br>N<br>o | Attribute   |
|-----------------|--|--------------------|---|
| 1               | Sri Lanka has many nature attractions/places               | 2                  | Safe as a travel destination;                       |
| 3               | Has a high degree of accessibility by roads;               | 4                  | Good place to take children                         |
| 5               | Good place as a honeymoon destination                      | 6                  | Hill country has unique natural sceneries           |
| 7               | Climatic conditions in hill country is unique              | 8                  | I am happy with the environment in tea plantations  |
| 9               | I am happy with the activities done in the tea plantations | 10                 | I am happy with the tour package to tea plantations |
| 11              | Tour package included everything in tea plantations        | 12                 | Taste of "Ceylon Tea" is extremely good             |
| 13              | Quality of accommodation in hill country is good           | 14                 | Happy with the services of the hotel staff          |
| 15              | Guides/Interpreters have a good knowledge                  | 16                 | Happy with the cleanliness of tea plantation area   |

- |   |  |
|---|--|
| <p>17 Many agro products are available in tea plantation area</p> <p>19 Happy with the road system to hill country</p> <p>21 Happy with the services in the tea plantations</p> <p>23 Enjoyed a lot in tea plantation areas</p> | <p>18 Visiting of tea factories is fascinates</p> <p>20 Enough information in hill country areas</p> <p>22 Mass tourism disturbs the nature in Sri Lanka</p> <p>24 I would like to visit tea plantations again for holiday</p> |
|---|--|

### 3.1.1.4 Visitor Opinions & Suggestions

This sub heading describes the opinions and suggestions that the visitors made during their stay in Sri Lanka.

**Table 3.14** Awareness on the Tea Plantations in Sri Lanka Prior to their Visit to Sri Lanka

| Response     | Number     | (%)        |
|--------------|------------|------------|
| Yes          | 302        | 74.9       |
| No           | 101        | 25.1       |
| <b>Total</b> | <b>403</b> | <b>100</b> |

Table 3.14 indicated that nearly 75% of the visitors who have awareness on Sri Lanka Tea Plantations before visiting to Sri Lanka. In other words every three visitors from four visiting to Sri Lanka know about Sri Lanka Tea Plantation prior to their visit to Sri Lanka.

Table 3.15 shows that majority of the people influenced to know about Sri Lanka Tea Plantations through Newspapers & Magazines (43%) while 33.44% through Internet, 23.84% are by Friends, 16.89% through TV, 12.25% from Travel Agents & Tour Operators of respondents' country and Guide Books, 9.27 are from Parents, 7.97 from previous visits, 5.3% from Travel Agents & Tour Operators in Sri Lanka, 2.32% from Hotels, 1.66% from Schools and 0.33% from the Information Counters at the airport.

**Table 3.15** Source of Information About Tea Plantations in Sri Lanka

| Source of Information                   | Number | (%)   |
|---|--------|-------|
| Newspapers & Magazines                  | 130    | 43.00 |
| Internet                                | 101    | 33.44 |
| Friends                                 | 72     | 23.84 |
| TV                                      | 51     | 16.89 |
| Travel Operators in respondents country | 37     | 12.25 |
| Guide Books                             | 37     | 12.25 |
| Parents                                 | 28     | 9.27  |
| Previous Visits                         | 24     | 7.97  |

**Table 3.15** (Continued)

| Source of Information                       | Number     | (%)        |
|---|------------|------------|
| Other sources                               | 21         | 6.95       |
| Travel Agents & Tour Operators in Sri Lanka | 16         | 5.3        |
| Hotels                                      | 7          | 2.32       |
| School                                      | 5          | 1.66       |
| Information counters at the airport         | 1          | 0.33       |
| <b>Total Awareness</b>                      | <b>302</b> | <b>100</b> |

Table 3.16 explain the how far the tourists visited to Sri Lanka get awareness on “Ceylon Tea” before coming to Sri Lanka. The Table shows that majority of the respondents (88.1%) who have heard about “Ceylon Tea” before visit Sri Lanka.

**Table 3.16** Awareness on the “Ceylon Tea” Prior to Visit Sri Lanka

| Response     | Number     | (%)        |
|--------------|------------|------------|
| Yes          | 355        | 88.1       |
| No           | 48         | 11.9       |
| <b>Total</b> | <b>403</b> | <b>100</b> |



Table 3.17 shows that, majority of the people influenced to know about “Ceylon Tea” through Newspapers & Magazines (49%) while 46.2% are from Friends & Relatives, through Internet, 17.18%, 8.17% from other sources, 3.66% from their Schools, 5.92% from their Parents, 3.1% from Travel Agents & Tour Operators’ and 2.54% from their previous visits.

**Table 3.17** Source of Information about “Ceylon Tea”

| Source of Information          | Number     | (%)        |
|--------------------------------|------------|------------|
| Newspapers & Magazines         | 174        | 49.00      |
| Friends & Relatives            | 162        | 45.63      |
| TV                             | 61         | 17.18      |
| Internet                       | 58         | 16.34      |
| Others                         | 29         | 8.17       |
| Parents                        | 21         | 5.92       |
| Books                          | 15         | 4.23       |
| Schools                        | 13         | 3.66       |
| Travel Agents & Tour Operators | 11         | 3.1        |
| Previous Visits                | 9          | 2.54       |
| <b>Total Awareness</b>         | <b>355</b> | <b>100</b> |

Table 3.18 explain that, how the tourists were aware on having tasted “Ceylon Tea” prior to their visit to Sri Lanka. Table 3.18 shows that, majority of the respondents (85.6%) have tasted “Ceylon Tea” before visit Sri Lanka.

**Table 3.18** Awareness on Tasted of “Ceylon Tea” Prior to Visit Sri Lanka

| <b>Response</b> | <b>Number</b> | <b>(%)</b> |
|-----------------|---------------|------------|
| Yes             | 345           | 85.6       |
| No              | 58            | 14.4       |
| <b>Total</b>    | <b>403</b>    | <b>100</b> |

The Table 3.19 shows that the categories of “Ceylon Tea” mostly interested to drink by the respondents visited to Sri Lanka. As shown in the Table, majority of them (67.2%) prefer to drink “Black Tea” under the brand name of “Ceylon Tea” while 20.6% like to drink “Green Tea”, 8.4% “Orthodox Tea” and 3.8% like to drink “Other varieties” like grange tea, Jasmine tea, etc under the brand name of “Ceylon Tea”.

**Table 3.19** Variety of “Ceylon Tea” that the Visitors Mostly Prefer to Drink

| <b>Category of Tea</b> | <b>Number</b> | <b>(%)</b> |
|------------------------|---------------|------------|
| Black Tea              | 232           | 67.2       |
| Green Tea              | 71            | 20.6       |
| Orthodox Tea           | 29            | 8.4        |
| Other varieties        | 13            | 3.8        |
| <b>Total</b>           | <b>345</b>    | <b>100</b> |

Based on the experiences of the visitors by tasting “Ceylon Tea”, visitors were asked to assess certain preference factors about “Ceylon Tea” which showed in Table 3.20. According to the results reflected in the Table, the preference factor “It has a unique taste” (Mean=4.23) was rated by visitors at “Strongly Agree” level while the preference category “It has a strong taste” as “Agree” level (Mean=3.80). The preference levels rated by “Not Sure” level by visitors for the factor “It can

be recommended as a best tea ever tasted” (Mean=3.33) and “It is my favourite tea” (Mean=3.27).

**Table 3.20** Tourists’ Rating of “Ceylon Tea”

| <b>Preference</b>                             | <b>Mean Value</b> | <b>S.D.</b> | <b>Level of Agreement</b> |
|---|-------------------|-------------|---------------------------|
| It has a unique taste                         | 4.23              | 0.93        | Strongly Agree            |
| It has a strong taste                         | 3.80              | 1.00        | Agree                     |
| It can be recommended as best tea ever tasted | 3.33              | 0.85        | Not Sure                  |
| It is my favourite                            | 3.27              | 0.93        | Not Sure                  |
| <b>Total Preferred for “Ceylon Tea” - 345</b> |                   |             |                           |

### **Statistical Comparisons of Perception Factors on “Ceylon Tea” Between “Genders” of the Respondents:**

This analysis of Table 3.21 describes the comparisons of Mean scores among visitors those who has rated their perception on “Ceylon Tea” by their gender. The test result of independent samples t-test was used to indicate the significant differences among genders and perception of the study.

Male respondents had highest positive thinking (Mean=4.27) on “Ceylon Tea has a unique taste” followed by “Ceylon Tea has a strong taste” (Mean=4.01) while female respondents having highest values for “Ceylon Tea can be recommended as best tea ever tasted” (Mean=3.35) and “Ceylon Tea is my favourite Tea” (Mean=3.39). The factor “Ceylon Tea has a strong taste” indicated that it is statistically significant difference between the male and female at 95% confidence level and at 5% error.

**Table 3.21** Tourists' Rating of "Ceylon Tea" by Gender

| Key Factor                                 | Gender (Mean) |        | t-Test  |         |
|--|---------------|--------|---------|---------|
|  | Male          | Female | t-value | p-value |
| It has a unique taste                      | 4.27          | 4.16   | -1.381  | 0.168   |
| It has a strong taste                      | 4.01          | 3.38   | -5.440  | 0.00*   |
| Can be recommended as best tea ever tasted | 3.32          | 3.35   | 0.254   | 0.800   |
| It is my favourite tea                     | 3.21          | 3.39   | 1.706   | 0.089   |

**Remarks:** \* Indicates statistically significant differences between gender groups at  $p \leq 0.05$

### Statistical Comparisons of Perception Factors on "Ceylon Tea" Among "Age group" of the Respondents:

The analysis in the Table 3.22 describes the comparisons of Mean scores among visitors who have rated their perception on "Ceylon Tea" by their Age group. The test result of One-way ANOVA was used to indicate the significant differences among age groups and key factors of the study. This analysis indicated that all factors under the perception levels on "Ceylon Tea" is statistically significant difference among the age groups at 95% confidence level and at 5% error.

**Table 3.22** Tourists' Rating of "Ceylon Tea" by Age Group

| Key Factor No. | Age Group (Mean value) |         |         |         |         |         | ANOVA     |         |
|----------------|------------------------|---------|---------|---------|---------|---------|-----------|---------|
|                | Less 19                | (21-30) | (31-40) | (41-50) | (51-60) | Over 60 | F - value | p-value |
| 1.             | 2.75                   | 4.35    | 4.26    | 4.09    | 4.49    | 4.29    | 14.594    | 0.000*  |
| 2.             | 4.50                   | 4.01    | 3.70    | 3.33    | 4.00    | 3.94    | 5.270     | 0.000*  |
| 3.             | 2.25                   | 3.33    | 3.34    | 3.11    | 3.84    | 3.34    | 8.352     | 0.000*  |
| 4.             | 2.25                   | 3.10    | 3.34    | 3.25    | 3.65    | 3.31    | 5.515     | 0.000*  |

**Remarks:** \* Indicates statistically significant differences between age groups at  $p \leq 0.05$

**Key Factor No:**

1. It has a unique taste
2. It has a strong taste
3. Can be recommended as a best tea ever tasted
4. It is my favourite tea

**Past Experience of the Visitors to the Agro-tourism Sites**

As shown in Table 3.23, 32% of the visitors travelled to Sri Lanka responded that they have visited to see agro-tourism sites in India, USA, South Africa, Canada, France, Malaysia, etc. during their previous travelled.

Furthermore, the result indicated that, 52% from the visitors who have travelled to see agro-tourism sites also have visited to see tea-tourism sites in India, Indonesia, Kenya, Malaysia, Sri Lanka, etc.

**Table 3.23** Visited an Agro-tourism Site by International Visitors

| <b>Response</b> | <b>Number</b> | <b>(%)</b> |
|-----------------|---------------|------------|
| Visited         | 127           | 32         |
| Not Visited     | 276           | 68         |
| <b>Total</b>    | <b>403</b>    | <b>100</b> |

As per the Table 3.24, the respondents were asked to describe of their overall holiday experience in Sri Lanka. A high proportion of them (58.1%) responded that it is “Good” while 28.8% responded that it was “Beyond expectations”, 12.4% commented that it was “Satisfactory” and 0.7% commented that it is “Unsatisfactory”. In other words overall 99.9% shows that they enjoyed during their stay in Sri Lanka.

**Table 3.24** Overall Holiday Experience in Sri Lanka

| <b>Experience Level Category</b> | <b>Number</b> | <b>(%)</b>   |
|----------------------------------|---------------|--------------|
| Good                             | 234           | 58.1         |
| Beyond Expectations              | 116           | 28.8         |
| Satisfactory                     | 50            | 12.4         |
| Unsatisfactory                   | 3             | 0.7          |
| <b>Total</b>                     | <b>403</b>    | <b>100.0</b> |

Table 3.25 describe that the important attributes considered by the visitors when they selecting a destination for travel. In order to find out the scale for the rating levels Mean was calculated for each preference mentioned in the table. Mean values (4.25) and (4.21) were accounted by the preference category “Price/Affordability” and “Safety & Security” respectively. Hence, these attributes reflected as a “Most Important” level when visitors selecting a destination for travel. Mean values 4.18, 3.98, 3.94, 3.94, 3.73, 3.85, 3.77 and 3.75 were accounted by the preference category “Uniqueness of a Destination”, “Water Supply & Sanitation”, “Attractions/events/festivals” and “Range of activities”, “Accessibility”, “Weather & Climate”, “Accommodation/Lodging” and “Restaurants” respectively and these were reflected as a “More Important” level when visitors selecting a destination for travel. Finally, Mean value 2.45 for “Natural Disaster” reflected as a “Less Important” level when they selecting a travel destination.

**Table 3.25** Important Attributes Considered by the Visitors when Selecting a Destination for Travel

| <b>Important Attributes Consider When Selecting a Destination for Travel</b> | <b>Mean Value</b> | <b>S.D.</b> | <b>Rating Level</b> |
|--|-------------------|-------------|---------------------|
|  |                   |             |                     |
| Price/affordability  | 4.25              | 0.84        | Most Important      |
| Safety & security  | 4.21              | 1.04        | Most Important      |
| Uniqueness of a destination  | 4.18              | 0.81        | More Important      |
| Water Supply & Sanitation  | 3.98              | 2.03        | More Important      |
| Attractions/events/festivals   | 3.94              | 1.10        | More Important      |
| Range of activities  | 3.94              | 0.87        | More Important      |
| Accessibility  | 3.73              | 1.07        | More Important      |
| Weather/climate  | 3.85              | 1.15        | More Important      |
| Accommodation/lodging  | 3.77              | 0.94        | More Important      |
| Restaurants  | 3.75              | 0.98        | More Important      |
| Natural disaster   | 2.45              | 1.16        | Less Important      |

Respondents were asked to describe their opinion on the development of present agro-tourism and tea-tourism development in Sri Lanka. The Table 3.26 shows that a majority of visitors (49.6%) commented that it is not sure to say that “Agro-tourism in Sri Lanka is developed or not” while 32.3% commented that “Agro-tourism in Sri Lanka is not

developed yet” and 18.1% commented that “Agro-tourism is developed in Sri Lanka at present”. Similarly a majority of visitors (40.4%) commented that “Tea-tourism in Sri Lanka not developed” while 32% responded that it is not sure to say that “Tea-tourism in Sri Lanka is developed or not” and 18.1% commented that “Tea-tourism is developed in Sri Lanka at present”

**Table 3.26** Status of the Development of Agro-tourism and Tea-tourism in Sri Lanka

| Status of Development | Number     | (%)        |
|-----------------------|------------|------------|
| Agro-tourism          |            |            |
| Developed             | 73         | 18.1       |
| Not Developed         | 130        | 32.3       |
| Not Sure              | 200        | 49.6       |
| Tea-tourism           |            |            |
| Developed             | 111        | 27.5       |
| Not Developed         | 163        | 40.4       |
| Not Sure              | 129        | 32.0       |
| <b>Total</b>          | <b>403</b> | <b>100</b> |

Table 3.27 summarises that the suggestions made by 403 respondents on the present development of agro-tourism in Sri Lanka. As shown in the table, 49.6% of the responded commented that it is not sure to say that the agro-tourism in Sri Lanka is developed or not while indicating 32.3% as not developed and 18.1% as developed.



**Table 3.27** Status of Agro-tourism Development in Sri Lanka

| <b>Status of Agro-tourism Development in Sri Lanka</b> | <b>Number</b> | <b>(%)</b> |
|--|---------------|------------|
| Developed  | 73            | 18.1       |
| Not Developed  | 130           | 32.3       |
| Not Sure   | 200           | 49.6       |
| <b>Total</b>   | <b>403</b>    | <b>100</b> |

Table 3.28 summarises that the suggestions made by 130 respondents on the development of agro-tourism in Sri Lanka. As shown in the Table 3.28, the following areas were identified by the researcher based on the suggestions made by the respondents according to the priority: More attention on product development in agro-tourism as a rank 1, need government involvement by giving more priority and leadership on the development of agro-tourism as rank 2, invite foreign & local investors to invest and providing incentives for them in this regards as rank 3, more awareness on agro-tourism as rank 4 and more promotions on agro-tourism as rank 5.

**Table 3.28** Suggestions on Agro-tourism Development in Sri Lanka

| <b>No.</b> | <b>Main Area</b>                    | <b>Sub Areas</b>   | <b>Rank</b> |
|------------|-------------------------------------|--|-------------|
| 1.         | Product development                 | Infrastructure, promotional materials development, offer home stays, creating new tour itinerates on tea-tourism, tour packages, marketing strategies, etc | 1           |
| 2.         | Government involvement (leadership) | Government priority, leadership, formulation of policies on agro-tourism   | 2           |
| 3.         | Future investment                   | Invite Foreign & local investors to invest on agro-tourism and offer incentives  | 3           |
| 4.         | More awareness                      | More Awareness on agro-tourism for travel trade, local community, plantation sector, govt. sector, etc & provide necessary information                     | 4           |
| 5.         | More promotions                     | More promotions, publicity, advertising  | 5           |

Table 3.29 summarises that the suggestions made by 403 respondents on the present development of tea-tourism in Sri Lanka. As shown in the table, 40.5% of the responded commented that tea-tourism in Sri Lanka is not developed, 32% indicated that it is not sure to say the tea-tourism in Sri Lanka is developed or not while indicating 27.5% as developed.

**Table 3.29** Status of Tea-tourism Development in Sri Lanka

| <b>Status of Tea-tourism<br/>Development in Sri Lanka</b> | <b>Number</b> | <b>(%)</b>   |
|---|---------------|--------------|
| Developed   | 111           | 27.5         |
| Not Developed   | 163           | 40.5         |
| Not Sure  | 129           | 32.0         |
| <b>Total</b>  | <b>403</b>    | <b>100.0</b> |

The suggestions made by 163 respondents on the development of tea-tourism in Sri Lanka, is shown by Table 3.30. As shown in the Table, the following areas were identified by the researcher based on the suggestions made by the respondents according to the priority: More attention on product development in tea-tourism as rank 1, more promotions on tea-tourism as rank 2, more awareness on tea-tourism as rank 3 and need government involvement by giving more priority and leadership on the development of tea-tourism.

**Table 3.30** Suggestions on Tea-tourism Development in Sri

| No | Main Area                           | Sub Areas  | Rank |
|----|-------------------------------------|--|------|
| 1. | Product development                 | Product development such as infrastructure, promotional materials development, offer home stays, creating new tour itinerates on tea-tourism, tour packages, marketing strategies, etc | 1    |
| 2. | More promotions                     | More promotions, publicity, advertising  | 2    |
| 3. | More awareness                      | More Awareness on agro-tourism for travel trade, local community, plantation sector, govt. sector, etc & provide necessary information   | 3    |
| 4. | Government involvement (leadership) | Government priority, leadership, formulation of policies on agro-tourism   | 4    |

Lanka

### 3.1.2 Local Community

Four villages: Castlereagh and Osborne in the Maskeliya Divisional Secretary Division and Bogawantalawa and Bogawanna in the Bogawantalawa Divisional Secretary Division were selected to carry out the local community survey by considering recommendation given by the government servant responsible for these divisions since these two areas having high potential for tea-tourism. The 150 household members were selected as per the Multistate Cluster Sampling

method which represents the household members in all divisions mentioned above. The above survey was conducted in the above mentioned areas for the period from 26<sup>th</sup> to 27<sup>th</sup> December 2007 to collect data from the respective household members. Data were collected through the structured questionnaire had been designed and translated into local language (Tamil) in particular to the survey area. Four enumerators were trained to conduct the survey in Tamil language and the respective questionnaires were gathered by interviewing the chief of the household where ever possible during the above period under the supervision by the researcher. Finally, sample of 150 local community questionnaires were analyzed at 0.05 (95%) level of confidence.

The objective of the collection of data from this questionnaire is: to collect local community demographic data, awareness of agro-tourism, socio and cultural aspects of tea-tourism, environmental aspects of tea-tourism and economic impact of tea tourism.

### **3.1.2.1 Profile of Local Community: Household Members**

Local Community stakeholder group questionnaire comprises of five parts. The main objective of the part one was to examine the demographic characteristics of the household members in the tea plantation areas. Data related to awareness on the agro-tourism including tea-tourism by local community were collected from part two and data related to the socio and cultural aspects of tea-tourism were collected from part three of the questionnaire. Data related to the environmental aspects and economic impact of tea-tourism was collected from part four and part five of the questionnaire respectively.

The Table 3.31 describes the profile of visitors those who interviewed in the plantation areas. As show in the table, a major proportion of visitors accounted for male (78%) while having 32% for female. The following age categories were responded considerably during the survey: age category of 51-60 yrs (38.7%), age category 31-40 yrs (28.7%), age 41-50 yrs (26%).

It is noteworthy that nearly half of the responders have been obtained their education between grade 5-10 (48.7%) while having educational up to grade 5 (47.4%), 2% had G.C.E (O/L) qualification and 2% were not obtained any education. This reflect that most of the households belongs to the plantation areas were obtained only their primary education.

As shown in the Table 3.31, nearly four-third (3/4) of the household members are living in their since their birth while 10.7% were living since more than 15 years.

Level of the income of the local community is one of the good indicators to assess their current living standards. As shown in the table, majority of the household members earn between 5,001 to 6,000 rupees (26.7%) (approx. US\$ 46 to US\$ 55) while earning between 2,001 to 3,000 rupees (24%) (approx. US\$ 19 to US\$ 28) per month. In the income category between 4,001 to 5,000 rupees (approx. US\$ 38 to US\$ 46) earn by 14.6% of the respondents and monthly income between 3,001 to 4,000 rupees (approx. US\$ 28 to US\$ 37) earn by 14% of respondents. In other words, as shown in he table there are 16% of the household members earn more than 6,000 rupees (approx. more than US \$ 55) per month. This indicates that majority were low income gaining households in the tea plantation areas.

**Table 3.31** Profile and Socio-Economic Characteristics of

| <b>Age</b>  |               |            | <b>Duration of Living in Tea Plantation</b> |               |            |
|---|---------------|------------|---|---------------|------------|
|   | <b>Number</b> | <b>(%)</b> |   | <b>Number</b> | <b>(%)</b> |
| Less than 20 yrs                                  | -<br>2        | -<br>1.3   | Less than 2 yrs                             | -<br>2        | -<br>1.3   |
| 21-30 yrs   | 43            | 28.7       | 2 to 5 yrs                                  | 9             | 6.0        |
| 31-40 yrs   | 39            | 26.0       | 5 to 10 yrs                                 | 11            | 7.3        |
| 41-50 yrs   | 58            | 38.7       | 10 to 15 yrs                                | 16            | 10.7       |
| 51-60 yrs   | 8             | 5.3        | Over 15 yrs Since birth                     | 112           | 74.7       |
| <b>Education Qualifications</b>                   |               |            | <b>Total Household Income (Rs.)</b>         |               |            |
| None  | 3             | 2.0        | ≤ 2,000                                     | 7             | 4.7        |
| Up to year 5                                      | 71            | 47.3       | 2,001-3,000                                 | 36            | 24         |
| Year 5 to 10                                      | 73            | 48.7       | 3,001-4,000                                 | 21            | 14         |
| G.C.E (O/L)                                       | 3             | 2.0        | 4,001-5,000                                 | 22            | 14.6       |
| G.C.E. (A/L)                                      | -             | -          | 5,001-6,000                                 | 40            | 26.7       |
| Degree  | -             | -          | 6,001-7,000                                 | 13            | 8.7        |
| Post Graduate                                     | -             | -          | >7,000                                      | 11            | 7.3        |
| <b>Agriculture Related Household Income (Rs.)</b> |               |            | <b>Tea Related Household Income (Rs.)</b>   |               |            |
| ≤ 2,000   | 14            | 9.3        | ≤ 2,000                                     | 23            | 15.3       |
| 2,001-3,000                                       | 41            | 27.3       | 2,001-3,000                                 | 46            | 30.7       |
| 3,001-4,000                                       | 30            | 20         | 3,001-4,000                                 | 33            | 22         |
| 4,001-5,000                                       | 20            | 13.3       | 4,001-5,000                                 | 11            | 7.4        |
| 5,001-6,000                                       | 37            | 24.8       | 5,001-6,000                                 | 35            | 23.3       |
| 6,001-7,000                                       | 3             | 2          | 6,001-7,000                                 | -             | -          |
| >7,000  | 5             | 3.3        | >7,000                                      | 2             | 1.3        |
| <b>Gender</b>                                     | <b>Number</b> | <b>(%)</b> | <b>Secondary Income</b>                     | <b>Number</b> | <b>(%)</b> |
| Male  | 117           | 78         | Yes   | 21            | 86         |
| Female  | 33            | 22         | No  | 129           | 14         |

### Local Community

Table 3.32 shows that nearly 97% of the household members were employed while engaging with secondary income source as 21% as shown in Table 3.31. Most of the household members those who were engaged in the secondary income source were engaged in the cattle farming, vegetable farming, business and other technical works. When analysing the family compassion, table shows that nearly 58% of the family's having two people they employed in other words as an average there are two people employed in a one family unit. It is noteworthy feature that all household members indicated this level of income is insufficient to run their families when questioning whether this income is quite enough to run their families.



**Table 3.32** Employment Characteristics of Local Community

| <b>Employment Status of Household</b>                     | <b>Number</b> | <b>(%)</b> | <b>Breakdown of Employees Per Family</b>     | <b>Number</b> | <b>(%)</b> |
|---|---------------|------------|--|---------------|------------|
| Employed  | 145           | 96.        | One Member                                   | 47            | 31.3       |
| Unemployed  | 5             | 7          | Two Members                                  | 88            | 58.7       |
|   |               | 3.3        | Three Members                                | 15            | 10.0       |
| <b>Total</b>  | <b>150</b>    | <b>100</b> | Average<br><b>1.56</b><br>persons            |               |            |
| <b>Members Employed in Agriculture (Excluding Tea)</b>    |               |            | <b>Members Employed Only in Tea Industry</b> |               |            |
| One Member  | 61            | 40.        | One Member                                   | 69            | 46         |
| Two Members   | 87            | 7          | Two Member                                   | 79            | 52.7       |
| Three Members   | 2             | 58.        | Three Member                                 | 2             | 1.3        |
|   |               | 0          |  |               |            |
|   |               | 1.3        |  |               |            |
| <b>Is the Income is Sufficient to Support the Family?</b> |               |            |  |               |            |
|   |               |            |  | <b>Number</b> | <b>(%)</b> |
| Sufficient  |               |            |  | -             | -          |
| Moderately Sufficient                                     |               |            |  | -             | -          |
| Insufficient  |               |            |  | 150           | 100        |
| <b>Total</b>  |               |            |  | <b>150</b>    | <b>100</b> |

### 3.1.2.2 Community Awareness on Agro-tourism

Table 3.33 describes that how the local community get awareness on agro-tourism. As show in the table, 63.3% of households indicated that they do not know what agro-tourism is while 28% of them indicating that they have fair knowledge and 8.7% have awareness what agro-tourism is.

**Table 3.33** Awareness on Agro-tourism

| <b>Do you know what Agro-tourism is?</b> |               |            |
|--|---------------|------------|
|  | <b>Number</b> | <b>(%)</b> |
| Do not know                              | 95            | 63.3       |
| Fair knowledge                           | 42            | 28.0       |
| Yes, I know                              | 13            | 8.7        |
| <b>Total</b>                             | <b>150</b>    | <b>100</b> |

According to the results of investigation from Table 3.34, it describe that the level of awareness in agro-tourism by local community. In order to find out the scale for the satisfaction levels as per the Likert scale, a Mean was calculated for each activity mentioned in the table. Since the factor “I like if more tourists visiting to see tea plantations” shows the highest Mean value (Mean=4.95) from other awareness factors, it has a greater satisfaction level than other activities at “Most Agree” level while having the same level for the factor “I like to know/learn about tea-tourism” (Mean=4.77). Similarly, other interested factors on awareness were rated at “Agree” level.

**Table 3.34** Assessment of Community Awareness on Agro-tourism

| <b>Key Factors</b>                                      | <b>Mean</b> | <b>S.D.</b> | <b>Level of Agreement</b> |
|---|-------------|-------------|---------------------------|
| I like if more tourists visiting to see tea plantations | 4.95        | 0.23        | Strongly Agree            |
| I like to know/learn about tea-tourism                  | 4.77        | 0.42        | Strongly Agree            |
| I like to know/learn more about agro-tourism            | 4.06        | 0.24        | Agree                     |
| I feel tea-tourism is suitable for us                   | 3.92        | 0.27        | Agree                     |
| I like to be a partner in the tea-tourism               | 3.51        | 0.87        | Agree                     |

### **Statistical Comparisons of Community Awareness between “Genders” of the Respondents in tea Plantation Areas:**

This analysis describes the comparisons of Mean scores among household members those who have rated their level of awareness on agro-tourism in tea plantation areas by their gender. A t-test was used to indicate the significant differences among genders and key factors by considering the independent samples of the study.

As shown in the Table 3.35, female respondents had highest positive thinking (Mean=5.00) towards “I like if more tourists visiting to see tea plantations” while having second highest positive thinking (Mean=4.93) for the same factor as “Strongly Agree” by male respondents. This reflected that the more people like, if more tourists visiting to see the tea plantations in their area. As per the table, Mean values 4.82 and 4.61 indicated having third and fourth highest Mean values responded by male and female respectively as “Strongly Agree” level for the factor “I like to know/learn about tea-tourism”. This indicated statistically significant difference between male and female respondents at 95% confidence level and at 5% error. Furthermore, factor, “I like to know/learn about tea-tourism” indicated statistically significant difference between the male and female at 95% confidence level and at 5% error. Three factors mentioned in Table 3.35 except the factor “I feel tea-tourism is suitable for us” and “I like if more tourists visiting to see tea plantations” reflected that male having more Mean value than female respondents.

**Table 3.35** Assessment of Community Awareness on Agro-tourism by Gender

| Key Factors   | Gender (Mean) |             | t-Test  |         |
|---|---------------|-------------|---------|---------|
|   | Male          | Female      | t-value | p-value |
| I like if more tourists visiting to see tea plantations | 4.93          | <b>5.00</b> | 1.546   | 0.124   |
| I like to know/learn about tea-tourism                  | 4.82          | 4.61        | - 2.641 | 0.009 * |
| I like to know/learn more about agro-tourism            | 4.07          | 4.03        | - 0.810 | 0.419   |
| I feel tea-tourism is suitable for us                   | 3.91          | 3.94        | 0.462   | 0.645   |
| I like to be a partner in the tea-tourism               | 3.26          | 3.24        | - 0.162 | 0.871   |

**Remarks:** \* Indicates “Statistically Significant” differences between Gender at  $p \leq 0.05$

### **Statistical Comparisons of Community Awareness between “Age Groups” of the Respondents in Tea Plantation Areas:**

The analysis in the Table 3.36 describes the comparisons of Mean scores among household members those who have rated their level of awareness on agro-tourism in tea plantation areas by their Age group. The test result of One-way ANOVA was used to indicate the significant differences among age groups and key factors of the study.

This analysis showed that only one awareness level in other words factor, “I like if more tourists visiting to see tea plantations” indicated statistically significant difference among the age groups at 95% confidence level and at 5% error. As shown in the Table 3.36, age category “21-30” respondents had highest awareness level (Mean=5.00) for “I like if more tourists

visiting to see tea plantations”. This shows that there is a high awareness level of all younger respondents (21-30) willing to know or learn about tea-tourism. Further more, the awareness factors on agro-tourism “I like to know/learn about tea-tourism” and “I like if more tourists visiting to see tea plantations” shows highest Mean values for all age groups as “Strongly Agree” level. This reflected that there is a high awareness level of all respondents for tea-tourism which was strongly agreed by the households in the tea plantation areas.

**Table 3.36** Assessment of Community Awareness on Agro-tourism by Age

| Key Fact or No. | Age Group (Mean Value) |         |         |         |         | ANOVA    |          |
|-----------------|------------------------|---------|---------|---------|---------|----------|----------|
|                 | (21-30)                | (31-40) | (41-50) | (51-60) | Over 60 | F- value | p- value |
| 1.              | 4.00                   | 4.02    | 4.08    | 4.09    | 4.00    | 0.632    | 0.640    |
| 2.              | <b>5.00</b>            | 4.70    | 4.77    | 4.84    | 4.63    | 1.170    | 0.327    |
| 3.              | 3.50                   | 3.30    | 3.23    | 3.19    | 3.09    | 1.279    | 0.281    |
| 4.              | 3.50                   | 3.95    | 3.95    | 3.90    | 3.88    | 1.652    | 0.164    |
| 5.              | 4.50                   | 4.98    | 4.92    | 4.97    | 4.88    | 2.680    | 0.034*   |

**Remarks:** \* Indicates statistically significant differences between Age groups at  $p \leq 0.05$

**Key Factor No:**

1. I like to know/learn more about agro-tourism
2. I like to know/learn about tea-tourism
3. I like to be a partner in the tea-tourism
4. I feel tea-tourism is suitable for us
5. I like if more tourists visiting to see tea plantations

### **3.1.2.3 Socio and Cultural Aspects of Tea-tourism**

According to the results of investigation from Table 3.37, it describe that the level of awareness on socio and cultural aspects of tea-tourism by local community. In order to find out the scale for the satisfaction levels as per the Likert scale, a Mean was calculated for each key factors mentioned in the table. Since the factor “Social life get benefits from tea-tourism” shows the highest Mean value (Mean=4.83) from other awareness factors, it has a greater satisfaction level than other activities at “Strongly Agree” level while having the same level for the factor “Tourists can see way of life of the people in the tea plantations” (Mean=4.57).

Likewise, “Tourism creates social problems like Criminality, alcoholism and drugs” was rated at “Agree” level (Mean=3.83). This reflected that though the people like to see the more tourists visiting the tea plantations, they expects such a criminality, alcoholism and drugs may happen due through tourism. However, “Exposure to other cultures and languages”, “Visiting of too many visitors damage rural life style of the community” and “People are motivated to learn English through tourism development in this area” were rated at “Not Sure” level by households. In other words, though the area is developed by tourism in future people has a doubt that whether they are motivated to learn English or more exposure on other languages due to their lifestyle in tea plantation areas.

**Table 3.37** Assessment on Socio and Cultural Aspects of Tea-tourism

| Key Factors  | Mean | S.D. | Level of Agreement |
|--|------|------|--------------------|
| Social life get benefits from tea-tourism                              | 4.83 | 0.52 | Strongly Agree     |
| Tourists can see way of life of the people in the tea plantations      | 4.57 | 0.50 | Strongly Agree     |
| Tourism creates social problems like criminality, alcoholism and drugs | 3.83 | 0.8  | Agree              |
| People are motivated to learn English through tourism                  | 3.25 | 0.55 | Not Sure           |
| Visiting of too many visitors damage rural life style of the community | 3.20 | 0.7  | Not Sure           |
| Exposure to other cultures and languages                               | 3.13 | 0.34 | Not Sure           |

### **Statistical Comparisons of Socio and Cultural Aspects of Tea-tourism between “Genders” of the Respondents in Tea Plantation Areas:**

This analysis describes the comparisons of Mean scores among household members those who have rated their level of awareness on socio and cultural aspects of tea-tourism in tea plantation areas by their gender. A t-test was used to indicate the significant differences among genders and key factors by considering the independent samples of the study.

As shown in the Table 3.38, female respondents had highest positive thinking (Mean=4.88) towards “Social life get benefits from tea-tourism”. In other words, this shows that all Mean values of the male and female respondents for the factors “Social life get benefits from tea-tourism” and “Tourists can see way of life of the people in the tea plantations” indicated as “Strongly agree” level. Like wise, “Exposure to other cultures and languages”, “Visiting of too many visitors damage rural life style of the community” and “People are motivated to learn

English through tourism” were indicated as “Not Sure” by all male and female respondents.

However, Table 3.38 shows that none of the factors were statistically significant difference between male and female respondents at 95% confidence level and at 5% error.

**Table 3.38** Assessment on Socio and Cultural Aspects of Tea-tourism by Gender

| Key Factors  | Gender (Mean) |        | t-Test  |         |
|--|---------------|--------|---------|---------|
|  | Male          | Female | t-value | p-value |
| Social life get benefits from tea-tourism                              | 4.82          | 4.88   | 0.563   | 0.574   |
| Exposure to other cultures and languages                               | 3.14          | 3.12   | -0.230  | 0.818   |
| Tourism creates social problems like Criminality, alcoholism and dugs  | 3.82          | 3.85   | 0.373   | 0.710   |
| Visiting of too many visitors damage rural life style of the community | 3.21          | 3.15   | -0.435  | 0.664   |
| Tourists can see way of life of the people in the tea plantations s    | 4.57          | 4.55   | -0.277  | 0.782   |
| People are motivated to learn English through tourism                  | 3.25          | 3.24   | -0.050  | 0.961   |

### **Statistical Comparisons of Socio ad Cultural Aspects of Tea-tourism “Age Groups” of the Respondents in Tea Plantation Areas:**

The analysis in the Table 3.39 describes the comparisons of Mean scores among household members those who have rated their level of awareness on socio and cultural aspects of tea-tourism in tea plantation areas by their Age group. The test result of One-way ANOVA was used to indicate the significant differences among age groups and key factors of the study.



This analysis shows that only one awareness level from all factors, “People are motivated to learn English through tourism” indicated statistically significant difference among the age groups at 95% confidence level and at 5% error. As shown in the Table 3.39, age category “21-30” respondents had highest awareness level (Mean=5.00) for “Social life get benefits from tea-tourism” and “Tourists can see way of life of the people in the tea plantations”. This shows that there is a high awareness level of all younger respondents’ (21-30) opinion that social life gets benefits from tea-tourism at “Strongly Agree” level. Similarly, the respondents belong to this age category believe that tourists can see the way of life of the people in the tea plantations when they visiting tea plantations at “Strongly Agree” level.

**Table 3.39** Assessment on Socio and Cultural Aspects of Tea-tourism by Age

| Key Factor No. | Age Group (Mean value) |         |         |         |         | ANOVA   |         |
|----------------|------------------------|---------|---------|---------|---------|---------|---------|
|                | (21-30)                | (31-40) | (41-50) | (51-60) | Over 60 | F-value | p-value |
| 1.             | <b>5.00</b>            | 4.88    | 4.77    | 4.83    | 4.88    | 0.305   | 0.874   |
| 2.             | 3.50                   | 3.12    | 3.08    | 3.19    | 3.00    | 1.598   | 0.178   |
| 3.             | 4.00                   | 3.84    | 3.82    | 3.81    | 3.88    | 0.170   | 0.953   |
| 4.             | 3.50                   | 3.19    | 3.15    | 3.28    | 2.88    | 0.687   | 0.602   |
| 5.             | <b>5.00</b>            | 4.51    | 4.56    | 4.59    | 4.63    | 0.555   | 0.696   |
| 6.             | 4.00                   | 3.37    | 3.15    | 3.10    | 3.88    | 5.980   | 0.000*  |

**Remarks:** \* Indicates, statistically significant differences between groups at  $p \leq 0.05$

**Key Factor No:**

1. Social life gets benefit from tea-tourism
2. Exposure to other cultures and languages
3. Tourism creates social problems like Criminality, alcoholism and drugs
4. Visiting of too many visitors damage rural life style of the community
5. Tourists can see way of life of the people in the tea plantations
6. People are motivated to learn English through tourism

### 3.1.2.4 Environmental Aspects of Tea-tourism

According to the results of investigation from Table 3.40, it describe that the level of awareness on environmental aspects of tea-tourism by local community. In order to find out the scale for the satisfaction levels as per the Likert scale, a Mean was calculated for each key factors mentioned in the table. Since the factor “Tea-tourism helps to protect our natural environment” shows the highest Mean value (Mean=4.83) from other awareness factors, it has a greater awareness level than other factors at “Strongly Agree” level while having the same level for the factor “Tea-tourism creates natural greenery” (Mean=4.31). The others factor indicated that at “Agree” levels, hence this reflected the positive sign of the people who awareness on tea-tourism.

**Table 3.40** Assessment on Environmental Aspects of Tea-tourism

| <b>Key Factors</b>   | <b>Mean</b> | <b>S.D.</b> | <b>Level of Agreement</b> |
|--|-------------|-------------|---------------------------|
| Tea-tourism helps to protect our natural environment                             | 4.83        | 0.56        | Strongly Agree            |
| Tea-tourism creates natural greenery   | 4.31        | 0.47        | Strongly Agree            |
| Tea-tourism helps to protect soil erosion  | 4.07        | 0.26        | Agree                     |
| Urbanization damage the areas beauty   | 4.07        | 0.25        | Agree                     |
| This creates improvements of road system and other facilities in tea plantations | 3.65        | 0.48        | Agree                     |

### **Statistical Comparisons of Environmental Aspects of Tea-tourism between “Genders” of the Respondents in Tea Plantation Areas:**

This analysis describes the comparisons of Mean scores among household members those who have rated their level of awareness on environmental aspects of tea-tourism in tea plantation areas by their gender. A t-test was used to indicate the significant differences among genders and key factors by considering the independent samples of the study.

As shown in the Table 3.41, female respondents had highest positive thinking (Mean=5.00) towards “Tea-tourism helps to protect our natural environment”. In other words, this shows that all Mean values of the male and female respondents for the factors “Tea-tourism creates natural greenery” and “Tea-tourism helps to protect our natural environment” indicated as “Strongly Agree” level while other factors indicated as “Agree” levels.

However, Table 3.41 shows that the factors “Urbanization damage the areas beauty” and “Tea-tourism helps to protect our natural environment” were statistically significant difference between male and female respondents at 95% confidence level and at 5% error.

**Table 3.41** Assessment on Environmental Aspects of Tea-tourism by Gender

| Key Factors  | Gender (Mean) |             | t-Test  |         |
|--|---------------|-------------|---------|---------|
|  | Male          | Female      | t-value | p-value |
| Tea-tourism helps to protect our natural environment                             | 4.33          | 4.24        | -0.991  | 0.323   |
| Tea-tourism creates natural greenery   | 4.06          | 4.12        | 1.192   | 0.235   |
| Tea-tourism helps to protect soil erosion  | 4.04          | 4.15        | 2.234   | 0.027*  |
| Urbanization damage the areas beauty   | 4.89          | <b>5.00</b> | 2.017   | 0.045*  |
| This creates improvements of road system and other facilities in tea plantations | 4.68          | 4.55        | -1.475  | 0.142   |

**Remarks:** \* Indicates, statistically significant differences between Gender at  $p \leq 0.05$

### Statistical Comparisons of Environmental Aspects of Tea-tourism “Age Groups” of the Respondents in Tea Plantation Areas:

The analysis in the Table 3.42 describes the comparisons of Mean scores among household members those who have rated their level of awareness on environmental aspects of tea-tourism in tea plantation areas by their age group. The test result of One-way ANOVA was used to indicate the significant differences among age groups and key factors of the study.

This analysis shows that only one awareness level from all factors, “Tea-tourism creates natural greenery” indicated statistically significant difference among the age groups at 95% confidence level and at 5% error. Table describes that the age categories (21-30), (41-50) and (51-60) indicated as “Strongly agree” level while other age categories indicating as “Agree” level for the factor “Tea-tourism creates natural

greenery”. “As shown in the Table 3.43, age category “21-30” respondents had highest awareness level (Mean=5.00) for “Tea-tourism creates natural greenery” and Tea-tourism helps to protect our natural environment”. This shows that there is a high awareness level of all younger respondents’ (21-30) opinion that tea-tourism creates natural greenery at “Strongly Agree” level. Similarly, the respondents belong to this age category believe that tea-tourism helps to protect our natural environment as well at “Strongly Agree” level. In general this reflected that all local people in the selected tea plantation area agreed on the factors given in the Table 3.42.

**Table 3.42** Assessment on Environmental Aspects of Tea-tourism by Age

| Key Factor No. | Age Group (Mean value) |         |         |         |         | ANOVA   |         |
|----------------|------------------------|---------|---------|---------|---------|---------|---------|
|                | (21-30)                | (31-40) | (41-50) | (51-60) | Over 60 | F-value | p-value |
| 1.             | 5.00                   | 4.19    | 4.44    | 4.34    | 4.00    | 3.809   | 0.006*  |
| 2.             | 4.00                   | 4.07    | 4.05    | 4.10    | 4.00    | 0.453   | 0.770   |
| 3.             | 4.00                   | 4.07    | 4.03    | 4.10    | 4.00    | 0.749   | 0.560   |
| 4.             | 5.00                   | 4.95    | 4.79    | 4.72    | 5.00    | 1.297   | 0.274   |
| 5.             | 4.00                   | 3.53    | 3.67    | 3.72    | 3.63    | 1.268   | 0.285   |

**Remarks:\*** Indicates statistically significant differences between Age groups at  $p \leq 0.05$

**Key Factor No:**

1. Tea-tourism helps to protect our natural environment
2. Tea-tourism creates natural greenery
3. Tea-tourism helps to protect soil erosion
4. Urbanization damage the areas beauty
5. This creates improvements of road system and other facilities in tea plantations

### 3.1.2.5 Economic Impact of Tea-tourism

According to the results of investigation from Table 3.43, it describes how the local community sense their judgments on economic impact by focusing many aspects of tea-tourism. In order to find out the scale for the satisfaction levels as per the Likert scale, a Mean was calculated for each key factors mentioned in the table. Since the factor “Big companies get most tourism benefits and creates less benefits for us” shows the highest Mean value (Mean=4.92) from other awareness factors, it reflects greater awareness level that this factor has at “Strongly Agree” level than other factors. Similarly, the factors “I like the development of this area as a tourist destination” (Mean=4.89) and “We have excellent potential to develop tea-tourism” (Mean=4.31) have same greater awareness level as “Strongly Agree” level. This reveals that how such a big potential available in these tea plantation areas on the development of tea-tourism according to the scrutiny of local people living in these areas. In the Mean while, seven factors indicated that the awareness on the economic impact at “Agree” levels, hence this reflected the positive sign of the people who awareness on tea-tourism.

According to the table, the following four factors shows that these are doubtful for the local people in connection with tea-tourism at “Not sure” awareness level: “Tea-tourism create more income to the people”, “Reduce or reverse migration of labour”, “Plantation companies can play major role to develop tea-tourism” and “Tourism creates more small business opportunities in our area developing this”. Other noteworthy feature that, the local people living in this area believes that “Terrorism will not threat to the development of tea-tourism” in Sri Lanka as per the Table 3.43.

**Table 3.43** Assessment on Economic Impact of Tea-tourism

| <b>Key Factors</b>   | <b>Mean</b> | <b>S.D.</b> | <b>Level of Agreement</b> |
|--|-------------|-------------|---------------------------|
| Big companies get most tourism benefits and creates less benefits for us | 4.92        | 0.27        | Strongly Agree            |
| I like the development of this area as a tourist destination             | 4.89        | 0.31        | Strongly Agree            |
| We have excellent potential to develop tea-tourism                       | 4.31        | 0.46        | Strongly Agree            |
| The village has a good community connection                              | 3.98        | 0.14        | Agree                     |
| There is no disruption by the community for future tourism development   | 3.96        | 0.20        | Agree                     |
| Tourism can creates many variety of tourism products                     | 3.92        | 0.41        | Agree                     |
| Tourism helps to improve infrastructure in our area                      | 3.91        | 0.28        | Agree                     |
| Due to tourism, land value will higher than other areas                  | 3.91        | 0.28        | Agree                     |
| Tourism can create more jobs to our area in future                       | 3.69        | 0.57        | Agree                     |
| Tourism can act as a generator of community development in the area      | 3.55        | 0.84        | Agree                     |

**Table 3.43** (Continued)

| <b>Key Factors</b>  | <b>Mean</b> | <b>S.D.</b> | <b>Level of Agreement</b> |
|---|-------------|-------------|---------------------------|
| Tourism creates more small business opportunities in our area developing this | 3.35        | 0.58        | Not Sure                  |
| Plantation companies can play major role to develop tea-tourism               | 3.21        | 0.41        | Not Sure                  |
| Reduce or reverse migration of labour   | 3.11        | 0.31        | Not Sure                  |
| Tea-tourism create more income to the people                                  | 3.09        | 0.28        | Not Sure                  |
| Terrorism is threat to develop tea-tourism                                    | 1.83        | 1.02        | Disagree                  |

### **Statistical Comparisons of Economic Impact of Tea-tourism between “Genders” of the Respondents in Tea Plantation Areas:**

This analysis describes the comparisons of Mean scores among household members those who have rated their level of awareness on economic impacts of tea-tourism in tea plantation areas by their gender. A t-test was used to indicate the significant differences among genders and key factors by considering the independent samples of the study.

As shown in the Table 3.44, female respondents had highest positive thinking (Mean=5.00) towards “I like the development of this area as a tourist destination”. In other words, the table shows that all Mean values of the male and female respondents for the factors “Big companies get most tourism benefits and creates less benefits for us”, “We have excellent potential to develop tea-tourism” and “I like the development of this area as a tourist destination” as “Strongly Agree” level.

However, all male and female respondents in the local community designated that “Terrorism will not threat to the development of tea-tourism” in Sri Lanka.

In the Mean while, Mean values for the other seven factors indicated that the awareness on the economic impact at “Agree” levels, hence this reflected the positive sign of the both people who awareness on tea-tourism. As per the table the factors “Tea-tourism create more income to the people”, “Reduce or reverse migration of labour”, “Tourism can create more jobs to our area in future”, “Tourism helps to improve infrastructure in our area”, “Due to tourism, land value will higher than other areas”, “Tourism can act as a generator of community development in the area” and “I like the development of this area as a tourist destination” were statistically significant difference between male and female respondents at 95% confidence level and at 5% error.



**Table 3.44** Assessment on Economic Impact of Tea-tourism by Gender

| Key Factors   | Gender (Mean) |             | t-Test  |         |
|---|---------------|-------------|---------|---------|
|   | Male          | Female      | t-value | p-value |
| Tea-tourism create more income to the people                                  | 3.11          | 3.00        | -2.017  | 0.045*  |
| Reduce or reverse migration of labour   | 3.14          | 3.00        | -2.271  | 0.025*  |
| Tourism can create more jobs to our area in future                            | 3.65          | 3.85        | 1.793   | 0.075*  |
| There is no disruption by the community for future tourism development        | 3.95          | 4.00        | 1.327   | 0.187   |
| The village has a good community connection                                   | 3.97          | 4.00        | 0.926   | 0.356   |
| Tourism helps to improve infrastructure in our area                           | 3.89          | 4.00        | 2.017   | 0.045*  |
| Due to tourism, land value will higher than other areas                       | 3.89          | 4.00        | 2.017   | 0.045*  |
| Tourism can act as a generator of community development in the area           | 3.64          | 3.21        | -2.641  | 0.009*  |
| Terrorism is threat to develop tea-tourism                                    | 1.79          | 1.97        | 0.910   | 0.364   |
| Plantation companies can play major role to develop tea-tourism               | 3.21          | 3.18        | -0.397  | 0.692   |
| Tourism creates more small business opportunities in our area developing this | 3.36          | 3.30        | 0.489   | 0.626   |
| Tourism can creates many variety of tourism products                          | 3.91          | 3.94        | 0.307   | 0.759   |
| Big companies get most tourism benefits and creates less benefits for us      | 4.93          | 4.88        | -0.985  | 0.326   |
| We have excellent potential to develop tea-tourism                            | 4.31          | 4.30        | -0.051  | 0.959   |
| I like the development of this area as a tourist destination                  | 4.86          | <b>5.00</b> | 2.271   | 0.025*  |

**Remarks:**\* Indicates statistically significant differences between Age groups at  $p \leq 0.05$

### **Statistical Comparisons of Economic Impact of Tea-tourism by “Age Groups” of the Respondents in Tea Plantation Areas:**

The analysis in the Table 3.45 describes the comparisons of Mean scores among household members who have rated their level of awareness on economic impacts of tea-tourism in tea plantation areas by their age group. The test result of One-way ANOVA was used to indicate the significant differences among age groups and key factors of the study.

This analysis shows that none of the awareness level from indicated statistically significant difference among the age groups at 95% confidence level and at 5% error. The table describes that the highest Mean values recorded by the age categories (21-30) for factors “Big companies get most tourism benefits and creates less benefits for us”, “We have excellent potential to develop tea-tourism” and “I like the development of this area as a tourist destination” as “Strongly Agree” level. The same high Mean value (Mean=5) was recorded by the age category “over 60” for the factor “I like the development of this area as a tourist destination” as “Strongly Agree” level.

In addition to that, respondents belongs to the all age categories commented that “Terrorism will not threat to the development of tea-tourism” in Sri Lanka. In general, the above results shows that the age category (21-30) has more weightage than other age categories towards to the agree level of awareness on economic impact of tea-tourism.

**Table 3.45** Assessment on Economic Impact of Tea-tourism by Age

| Key Factor No. | Age Group (Mean value) |         |         |         |             | ANOVA   |         |
|----------------|------------------------|---------|---------|---------|-------------|---------|---------|
|                | (21-30)                | (31-40) | (41-50) | (51-60) | Over 60     | F-value | p-value |
| 1.             | 3.00                   | 3.02    | 3.10    | 3.14    | 3.00        | 1.297   | 0.274   |
| 2.             | 3.00                   | 3.07    | 3.10    | 3.16    | 3.00        | 0.802   | 0.526   |
| 3.             | 3.50                   | 3.67    | 3.79    | 3.60    | 4.00        | 1.345   | 0.256   |
| 4.             | 4.00                   | 4.00    | 3.95    | 3.93    | 4.00        | 0.893   | 0.470   |
| 5.             | 4.00                   | 4.00    | 4.00    | 3.95    | 4.00        | 1.213   | 0.308   |
| 6.             | 4.00                   | 3.98    | 3.90    | 3.86    | 4.00        | 1.297   | 0.274   |
| 7.             | 4.00                   | 3.98    | 3.90    | 3.86    | 4.00        | 1.297   | 0.274   |
| 8.             | 4.00                   | 3.40    | 3.54    | 3.69    | 3.25        | 1.170   | 0.327   |
| 9.             | 1.00                   | 1.88    | 1.97    | 1.72    | 1.75        | 0.717   | 0.582   |
| 10.            | 3.00                   | 3.14    | 3.21    | 3.26    | 3.25        | 0.677   | 0.609   |
| 11.            | 3.00                   | 3.33    | 3.38    | 3.34    | 3.38        | 0.235   | 0.918   |
| 12.            | 4.00                   | 3.93    | 3.85    | 3.95    | 4.00        | 0.480   | 0.750   |
| 13.            | <b>5.00</b>            | 4.93    | 4.87    | 4.95    | 4.88        | 0.569   | 0.686   |
| 14.            | <b>5.00</b>            | 4.30    | 4.26    | 4.31    | 4.38        | 1.294   | 0.275   |
| 15.            | <b>5.00</b>            | 4.93    | 4.90    | 4.84    | <b>5.00</b> | 0.802   | 0.526   |

**Remarks:** Key Factor Nos:

| <b>Key Fact or No.</b> | <b>Attribute</b>   | <b>Key Factor No.</b> | <b>Attribute</b>   |
|------------------------|--|-----------------------|--|
| 1                      | Tea-tourism creates more income to the people                                  | 2                     | Reduce or reverse migration of labour;                                 |
| 3                      | Tourism can create more jobs to our area in future                             | 4                     | There is no disruption by the community for future tourism development |
| 5                      | The village has a good community connection                                    | 6                     | Tourism helps to improve infrastructure in our area                    |
| 7                      | Due to tourism, land value will higher than other areas                        | 8                     | Tourism can act as a generator of community development in the area    |
| 9                      | Terrorism is threat to develop tea-tourism                                     | 10                    | Plantation companies can play major role to develop tea-tourism        |
| 11                     | Tourism creates more small business opportunities in our area developing this; | 12                    | Tourism can creates many variety of tourism products                   |
| 13                     | Big companies get most tourism benefits and creates less benefit for us        | 14                    | We have excellent potential to develop tea-tourism;                    |
| 15                     | I like the development of this area as a tourist destination                   |                       |  |

### **Variety of Tourism Products Willingness to Offer by Local Community to the Tourists**

Table 3.46 describes that the type of tourism products willingness to offer by the local community to the tourists those who visits tea plantations. As shown in the table, all respondents were responded the following tourism products they can offer to the tourists visiting the tea plantation: “Take them to tea trekking”, “Take them to see beautiful tea landscapes” and “Take them to see tea factories”. There were ninety seven% (97%) of the total respondents commented that they are willingness to offer “Take them to see how tea plucking by the people” and “Selling of the tea products to them”, ninety five% (95%) offer “Take them to experience the life style of the people living in tea plantations” and ninety four% (94%) offer “Selling of souvenirs to the tourists”.

The north worthy feature is that, none of the respondents commented that to offer “Home stays for the visitors” since they do not have proper infrastructure, facilities and experience due to their present living conditions in the tea plantation sector.

**Table 3.46** Willingness to offer Products to the Visitors by Local Community in Tea Plantations

| <b>Type of Offer</b>   | <b>Number</b> | <b>(%)</b> |
|--|---------------|------------|
| Take them to tea trekking  | 150           | 100        |
| Take them to see beautiful tea landscapes                                      | 150           | 100        |
| Take them to see tea factories   | 150           | 100        |
| Take them to see how tea plucking by people                                    | 145           | 97         |
| Selling of tea products  | 146           | 97         |
| Take them to experience the life style of the people living in tea plantations | 142           | 95         |
| Selling of souvenirs to the tourists   | 141           | 94         |
| Providing home stays for visitors  | -             | -          |
| <b>Total</b>   | <b>150</b>    |            |

### **Areas to Consider to Improvement of Tea-tourism**

Local community were asked to select their preference for the following areas as mentioned in the Table 3.47 to the improvement of the tea-tourism. The important factor was that, all respondents were selected the following given areas where necessary to follow to the development of tea-tourism. Therefore, this reflects the important areas where needed to improve tea-tourism in the local community point of view as per the given areas.

**Table 3.47** Suggestions of Local Community on the Development of Tea-tourism

| <b>Area suggested</b>  | <b>Number</b> | <b>(%)</b> |
|--|---------------|------------|
| Do promotion in abroad   | 150           | 100        |
| Highways to be built from airport and other destinations to hill country | 150           | 100        |
| Introduce and upgrade railway transport system                           | 150           | 100        |
| Construction of luxury hotels  | 150           | 100        |
| More government involvement for tea-tourism                              | 150           | 100        |
| Stakeholder cooperation  | 150           | 100        |
| Infrastructure and facility development                                  | 150           | 100        |
| <b>Total</b>   | <b>150</b>    |            |

### 3.1.2.6 Community Opinions on Tea-tourism

Considering the current and future tourism expectations on tea-tourism, local community has identified three broader areas for the development of tea-tourism as mentioned bellow.

1. Product development
2. Stakeholder cooperation
3. Tourism promotions

(1) When considering the product development, necessity of improvement of the transportation system was well thought-out by the local people. By linking the road networks from other destinations to the tea plantation area and maintenance of the existing road system were highlighted under the transportation by them. They commented that poor quality of roads and poor accessibility to the tourism attractions also affects to the less number of tourists to this tea plantation area.

In addition to that improvement of water supply and sanitation in this area also were taken into consideration to develop tea-tourism in this area by the local community. Especially they were highly highlighted that to as a necessity to increased their wealth including sanitation facilities, increasing of wages in the tea plantation sector by the respective authorities because this will positively affected to the production of tea through high employment in the tea sector and finally future development of tea-tourism in Sri Lanka.

The local community suggested that there should be some awareness programmes on agro-tourism, tea-tourism in overall tourism industry to the local people by the respective tourism related authorities since they have lack of knowledge on tourism business.

Lack of quality hotels and guest houses, quality restaurants with hygienic foods, transport providers and information centres also were highlighted by the community to future development of this tea-tourism.

In addition to that, they highlighted government and respective authorities have not identified such a impact can be done to the country's economy through tea-tourism by focusing tea plantations.

(2) There are many stakeholders involves in the tea-tourism sector i.e. Plantation companies, accommodation providers, restaurants, tourist shops, transport providers, government authorities like Tourist Board, Ministry of Tourism, Tea Board, Divisional Secretaries, Political authority, local community, etc. But according to the present scenario people have a doubt about such cooperation is functioning or not. Noteworthy feature is that, though some tourism businesses are available in the plantation area, such cooperation is rare to exist due to lack cooperation and understanding among stakeholders especially between tourism establishments and local community.

As a negative impact, the local community highlighted that there is no such a close cooperation exists between tourism establishments and local communities. Local community expects some employment opportunities, additional benefits from the related establishments but they believe that it will problematic.

As a negative impact, the local community highlighted that there are many barriers available to see the tourism attractions to the tourists due to permission in the tea plantation sector because most of the tea plantations belongs to the private plantation companies.

(3) Tourism promotion was the other necessity sector highlighted by the local community to develop tea-tourism through out the survey. Local people commented that though the area having much potential for the tea-tourism such as beautiful tea plantations, water falls, natural sceneries, colonial bungalows, etc. study indicated that majority of the people not aware of such a potential due to lack of promotions. Therefore, local community commented that it is necessarily to do the tourism promotions locally and internationally by the respective authorities.

Beside that, local community suggested that the respective authority shod be used our colonial culture, colonial bungalow, tea factories, life style of the local people, beautiful sceneries, railway system especially brand name of “Ceylon Tea” to attract the more tourist through tourism promotions.



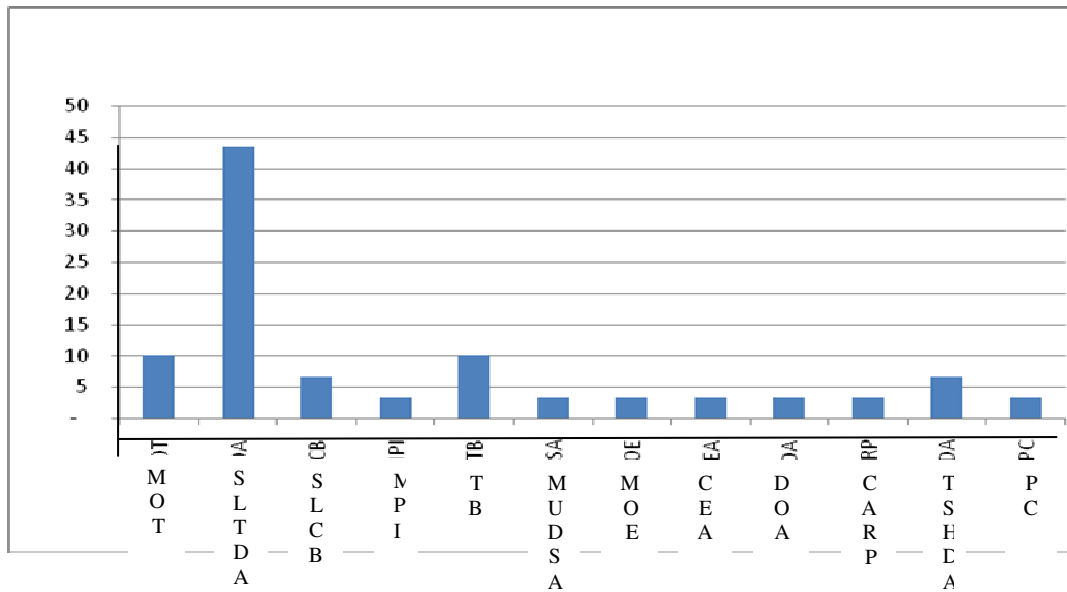
### **3.1.3 Tourism Resource Based Managing Organizations in the Public Sector (TRBMO)**

Tourism attractions, service providers and tourism activities are key elements in tourism. Tourism attractions which combine with tea plantations, service providers and tourism activities especially related to tea plantations are major areas of the tea-tourism. Apart from all, facilities, culture, people and environment make visitor happy and comfortable to fulfil their expectations during their away from normal environment. In the scenario of tea-tourism, biodiversity, nature, culture, local community, ecosystems, farming, service providers, activities related to tea are main factors to make the tea-tourism success. Availability of this kind of resources reflects the potentiality and successfulness of the whole tea-tourism market segment. But availability of resources it self does not indicate to be the successfulness tea-tourism if there is no managing system to manage those resources sustainably in a right direction to fulfil of visitor expectations. Not only that, it is problematic if there is no proper driving force behind in the all aspects of tourism development to gear the market through above resources. With regards to all aspects behind, identifying of organizations or authorities and their key areas to drive the whole resources sustainably to reach the expected goals is most important for long run process to the development of tea-tourism. As a consequence, the tea-tourism resource base managing organizations (TRBMO) are most important and key players for the whole tourism and its stakeholders who use the resources mentioned above.

The questionnaire (Part 02) investigates the objectives, contribution to tea-tourism, organizations' view of promoting tea-tourism and problems arise when developing tea-tourism by the respective Tourism Resource Base Managing Organizations. Therefore, Table 3.48 represents the respondent

Tourism Resource Base Managing Organizations with their level contribution to tea-tourism.

**Figure 3.1** Tourism Resource Based Managing Organizations



**Remarks:**

MOT: Ministry of Tourism; SLTDA: Sri Lanka Tourism Development Authority;

SLCB: Sri Lanka Convention Bureau; MPI: Ministry of Plantation Industries

TB: Sri Lanka Tea Board; MUDSA: Ministry of Urban Development & Sacred Area Development

MOE: Ministry of Environment; CEA: Central Environmental Authority

DOA: Department of Agriculture; CARP: Sri Lanka Council for Agricultural Resource Policy

TSHDA: Tea Small Holders Development Authority; PC: Provincial Councils

There are 13 organizations were able to considered for the data collection of the study as a Tourism Resource Based Managing Organization as shown in Table 3.48 due to time availability, geographical locations of the respective public organizations and availability of suitable officials in said organizations.

When referring to the Table 3.48, it reflected that there were no organizations exists according to their objectives to tea-tourism though some organizations directly related to the tourism or tea industry. Therefore, this gives a good platform to compare the objectives of the above organizations with the tourism and tea-tourism.

**Table 3.48** Level of Contribution to Tea-tourism by Tourism Resource Based Managing

| No<br>. | Organizations to Work Together                            | Objectives related to Tea-tourism or not (Y/N ,Partly or Low) |
|---------|---|---|
| 1.      | Ministry of Tourism (MOT)                                 | Partly  |
| 2.      | Sri Lanka Tourism Development Authority (STDA)            | Partly  |
| 3.      | Sri Lanka Tea Board (SLTB)                                | Partly  |
| 4.      | Sri Lanka Convention Bureau (SLCB)                        | Low   |
| 5.      | Tea Small Holders Development Authority (TSHDA)           | Low   |
| 6.      | Central Environment Authority (CEA)                       | Partly  |
| 7.      | Ministry of Environment                                   | Partly  |
| 8.      | Ministry of Plantation Industries (MOP)                   | No  |
| 9.      | Ministry of Urban Development & Sacred Area Development   | No  |
| 10.     | Department of Agriculture (DA)                            | Partly  |
| 11.     | Sri Lanka Council for Agricultural Resource Policy (CARP) | Low   |
| 12.     | Provincial Councils (PRC)                                 | Partly  |
| 13.     | Tea Research Institute (TRI)                              | Partly  |

Organizations

### **Organization's View of Promoting Tea-tourism:**

With regard to the organizations' view of promoting tea-tourism, following were stated in order to promote tea-tourism by the above Tourism Resource Base Managing Organizations.

As a whole, every organizations mentioned in the above contributes as majority moderate or low contribution to the tea-tourism since it is a new niche market segment to Sri

Lanka. As a result a necessary prioritization for the development of tea-tourism has not come up from the government to the study area. Some organizations commented that it is necessary to identify potential market segments and product development to generate more tourists to the country through research. Majority of commented that there should be some changes of the policy formulation in the related field since this is new market segments to Sri Lanka. Some organizations commented that government and relevant stakeholders should use the brand name of “Ceylon Tea” since it is very popular worldwide while suggesting bringing tea conventions, tea related workshops to the country as a promotional tool by focusing MICE market segment. Many organizations suggested that all tourism and tea related organizations such as stakeholders incorporate together, working closely through better understanding since at present such cooperation and coordination not to be seeing.

### **Problems have to Face by the Organizations when Developing Tea-tourism in Sri Lanka**

Following five broader problems areas were identified by the respective government organizations when developing tea-tourism in the country.

- 1) Lack of co-ordination and understanding between stakeholders some times no co-operation related to tourism as well as tea-tourism.
- 2) Policy formulation and implementation with regards to the tea-tourism.
- 3) Incorporate tea-tourism into overall tourism strategy
- 4) Product development
- 5) Financial support
- 6) Infrastructure development
- 7) Instability of the country

### **Factors Necessary to Incorporate Tea-tourism into the Overall Tourism Strategy**

Tea and Tourism is being viewed as two different areas which has not yet been incorporated, hence these industries are working in isolation. Therefore, many organizations were commented that it to be consider as a one of the main factor which affects to the development of tea-tourism in Sri Lanka, hence there should be a necessity to incorporate these two sectors together for the future development of tea-tourism. Therefore, following will describe the factors suggested by the above resource base managing organizations to incorporate tea-tourism into the overall strategy for Sri Lanka rather than having the tea and tourism in isolation:

#### **1) Through Joint Promotions**

As a National Tourism Organization in tourism, there are various type of international events: travel and tourism trade fairs, exhibitions, conventions participating by SLTDA annually with the private sector travel and tourism service providers. Like wise, Sri Lanka Tea Board also participating at the various type of conventions, exhibitions, etc which relates to tea industry annually with respective stakeholders in the tea industry annually. But at present or past there were no any evidence that these two sectors jointly participated at the above mentioned events. This shows that, clear picture about the two sectors tea and tourism is working isolate since there objectives are different from each other. By looking at the tea-tourism as a new niche market segment, the tourism resource base managing organizations proposes:

(i). To facilitate each sector leaders to participate their events mentioned above by creating suitable environment to other sector stakeholders since each sector getting benefits through tea-tourism.

(ii). To create the promotional materials in such a manner by representing both sectors as a joint promotions. Some organizations commented that when some sectors do their advertising campaigns other sectors can support through by advertising other sector in the same time by creating an environment for mutual understanding and cooperation between each sectors tourism and tea.

## 2) Product Development

There are many tourism attractions: colonial tea plantation bungalows, old tea factories, beautiful natural sceneries, etc being hiding in the country. Some organizations suggested that, leading organizations related to tourism in the public sector should take initiatives to convert such a bungalow into tourist accommodation units without damaging to the infrastructure or to the environment which would help to solve the accommodation problems in the near future. Similarly, related public organizations should be take initiate to convert the tea factories isolating in the tea plantation without using to the tea museums or some kind of an attractive way to promote tea-tourism through tea related activities as a joint cooperation between public sector and private sector stakeholders. Since “Ceylon Tea” is world popular brand respective authorities should take this advantage to attract many tourists to Sri Lanka while promoting tea under the brand name of “Ceylon Tea” world wide. As a solution to the incorporate tea into tourism, some officials in the respective TRBMO ‘s suggested that to take initiatives by the respective public organizations related to tourism and tea to create “Tea Culture” in hotels especially in

the tea plantation areas to depicting Sri Lanka's colonial period with tea. And also they suggested that, initiatives to be taken by respective authorities belongs to both sectors introduce to offer "Ceylon Tea" as a welcome drinks at hotels to give more value to typical Srilankan tea rather than offering western beverages in order to incorporate tea-tourism into the overall tourism strategy in Sri Lanka.

According to the suggestions made by some TRBMO's, tourism and tea related all stakeholders s should be encourage by the leading tea and tourism TRMBO's to find new avenues to promote this market segment for better success. As an example, they suggested to promote "Sri Lanka Tea Auction", the biggest tea auction in the world among every tourist who visits to Sri Lanka. Hence this will creates some avenues to incorporate tea-tourism into the overall tourism strategy.

### 3) Awareness Programs

Some resource based tourism managing organizations suggested that the relevant tourism leading public organizations should take initiative to do the necessary awareness to the tea plantation sector, local community in tea plantation areas and travel and tourism sector stakeholders on tea-tourism since this is new market segment to Sri Lanka.

### 4) Formulating New Policy Decisions

Some TRBMO's suggested that to formulate new policies and strategies with regards to the tea and tourism to incorporate tea-tourism into the overall tourism strategy by the respective authorities. And also it was indicated that, when formulating strategies the respective TRBMOs should be get the respective inputs from each stakeholder categories for the future development of this sector.



### **Proposed Organizations to Work together in tea-tourism**

Respective officers were asked to recommend the organizations should work together with them in the development of tea-tourism and the respective responses are ranked Table 3.50. There are five organizations: MOT, STDA, Sri Lanka Tea Board, MOP and private sector (Travel & Tourism industry) identified by the respondents as top priority (100%) organizations should work together while Plantation Companies, PRC's, PA, TSHDA and CBO's were proposed by the respondents to work very close together in addition to the above stakeholders in tea-tourism development in Sri Lanka.

There are a range of stakeholders are operational in the tea-tourism sector and their contribution to the sector will varies from the type of organization. Therefore, the stakeholder list shown by Table 3.49 is facilitating to know the most important stakeholders working together in the tea-tourism development in Sri Lanka.

Working together with stakeholders in tea-tourism, create path to make it success. Like wise there should be a mechanism for all stakeholders to work closely. Hence, following summarized the views given by respondent officers from different tourism related government resource managing organizations (TRBMO) through out the survey.

| No  | Organizations to work together  | “Yes”-<br>Number | (%) |
|-----|---|------------------|-----|
| 1.  | Ministry of Tourism (MOT)   | 30               | 100 |
| 2.  | Sri Lanka Tourism Development Authority (SLTDA)                                       | 30               | 100 |
| 3.  | Sri Lanka Tea Board   | 30               | 100 |
| 4.  | Tea Small Holders Development Authority (TSHDA)                                       | 22               | 73  |
| 5.  | Central Environment Authority (CEA)   | 13               | 43  |
| 6.  | Ministry of Plantation Industries (MOP)   | 30               | 100 |
| 7.  | Planters Association (PA)   | 23               | 77  |
| 8.  | Provincial Councils (PRC)   | 29               | 97  |
| 9.  | Road Development Authority (RDA)  | 15               | 50  |
| 10. | NGOs  | 11               | 37  |
| 11. | CBO of Tea Small Holders  | 22               | 73  |
| 12. | Ceylon Electricity Board (CEB)  | 12               | 40  |
| 13. | Water Board (WB)  | 13               | 43  |
| 14. | Plantation Companies (PC)   | 29               | 97  |
| 15. | Tea Research Institute (TRI)  | 16               | 53  |
| 16. | Agriculture Department (AD)   | 16               | 53  |
| 17. | Environment Concern NGOs  | 16               | 53  |
| 18. | Municipalities  | 16               | 53  |
| 19. | Private Sector (Travel & Tourism Sector)  | 30               | 100 |
| 20. | Others (Tea export Association, Colombo Tea Traders Association, Tea Factories, etc ) | 5                | 17  |

**Table 3.49** Recommended Organizations Work Together

**Role of Tourism Related Government Resource  
Managing Organization in  
Cooperation:**

- 1) Making of policy measures related to their major responsibilities thorough closely working and consultation with stakeholders in tea-tourism development

- 2) Conduct open forums periodically on the development of this sector to share the knowledge and experiences of all stakeholders in tourism development context.
- 3) Drive the organization with other stakeholders in the correlated major responsibilities to achieve the common goal established by all stakeholders.
- 4) Conduct of necessary awareness programmes or expertise knowledge to the sector when necessary.
- 5) Main and monitor all resources in connection with tea-tourism through sustainable measures and effective guidelines.
- 6) Facilitate to the respective trade by bringing investors: local and international through incentive schemes to uplift the tourism business.
- 7) Find strategies to incorporate tea-tourism into overall tourism strategy

### **Implications to Implement the Close Stakeholder Cooperation:**

#### **1) Strategic Actions**

1. Set up the tea-tourism development action plan through clear direction towards to the expected goals through continuous proper monitoring system.
2. Form a Strategic Working Group Committee by representing each stakeholder area.
3. Establish knowledge database by obtaining new ideas from stakeholders for the future development of the sector.
4. Government should take initiatives to consider the tea-tourism in their major priority

5. Government should carefully to take right policy measures by considering the future tea-tourism development.
6. Respective government bodies related to tea-tourism should be make arrangements to promote “Ceylon Tea” brand name in abroad

## **2) Mutual Understanding**

1. Respective tourism related resource managing organizations should support to the other non government stakeholders including local community when they expect the support from the related organizations.
2. Respective government bodies related to tea-tourism should support to the stakeholders by offering platform to bring tourists to Sri Lanka through international promotions
3. Government should take initiatives to provide maximum benefits to the local people in the tea-tourism context.

## **3) Awareness Programmes**

1. Awareness the stakeholders and local community on the significance of the tourism business.

## **Challenges that the Government Sees in Promoting Tea-tourism**

- 1) Linking of each sector which relates to tea-tourism with a good co-ordination
- 2) No proper commitment from all stakeholders
- 3) Lack of investment opportunities since tea-tourism is a new market segment

4) Poor infrastructure in most of tea growing areas

### **New Potential Areas that can be Develop Tea-tourism**

The majority of the TRBMOs mainly identified the following two geographical areas: Hill country and Low country as potential areas that can be used for the development of tea-tourism.

#### **Hill Country:**

Bogawantalawa, Maskeliya, Udapussellawa, Haputale, Hatton, Nuwaraeliya, Bandarawela and Talawakele

#### **Low Country:**

Deniyaya, Morawaka, Hiniduma

### **Value Added Methods for the Product Development of Tea-tourism**

#### **(1) Activities Based on Tea**

##### **Events:**

1. Tea cultural dance at hotels
2. Tea Festivals
3. Tea day at hotels, restaurants especially in tea plantation areas
4. Form a tea cultural dance troop

##### **Awareness Programmes:**

1. Demonstrate how tea developed during the British period up to now

2. Demonstrate to make good cup of tea to the tourists
3. Create environment to tasting tea in different elevation levels of Sri Lanka
4. Get awareness of tourists about how tea beneficial for our health

### **Special Interests**

1. Arrange time tourists to plucking tea with plantation workers
2. Arrange tea tours to see tea factories, beautiful sceneries, rural lifestyle of the people, colonial tea bungalows, tea museums
3. Introduce more Tea trials
4. Introduce Tea Camp Sites
5. Welcome all tourists by offering Tea as a welcome drink at hotel & other places
6. Introduce Tea Farm or Home Stay in small tea plantation in a different geographical area to get different kind of experience to tourists.
7. Take tourists to show Colombo tea auction
8. Joint venture Cable Car in the plantation Valleys

### **(2) Variety of Promotions**

1. Invite world reputed “Tea Lovers” to Sri Lanka
2. Designate Tea Brand ambassadors in connection with tea-tourism
3. Promote Health aspects of tea drinking
4. Introduced many kind of quality tea with international standard

e.g. Tradition of English breakfast tea, English dark tea, etc.

5. Offer a free cup of tea and sample pack of assorted tea bag pack with tips and maps of tea plantation areas to the tourists when they arrive at the airport with the association of Sri Lanka Tea Board and other respective stakeholders in tea-tourism
6. Production of tea bags from six different tea elevations in the country with tips of their health benefits
7. Creation of DVD or documentary film on tea-tourism in Sri Lanka
8. Promote Tea-tourism through Srilankan Cricket team

### **(3) Product Development**

#### **Quality and Standard**

1. Maintain quality and standards of tea
2. Create tea culture in the hotels

#### **Infrastructure**

1. Introduce Tea Centres, shops at hotels and Kiosk belongs to the popular tourists routes and public areas
2. Convert abandoned tea factories into Tea Museums
3. Introduced Tea Information Centres in the hotels and tourists routes

#### **Souvenirs**

1. Encourage respective companies and local people to create a Tea Souvenirs eg. Bonsai tea pots as a gift, handicrafts from tea, etc.

2. Introduce tea commodities e.g. Tea soap, Tea shampoo, Tea facials, herbal teas, etc.
3. Create good tea tour itineraries for tourists

### **What Developments Necessary to Promote Tea-tourism as a Special Market Segment?**

- 1) Infrastructure development
- 2) Uplift plantation workers living standards, health, welfare, education
- 3) Provide incentives to the tea and tourism industry to the training of respective skill areas which relates to tea-tourism
- 4) Identification of the market segments
- 5) Well focused promotional campaign by focusing target markets
- 6) Product development
- 7) Stakeholder cooperation
- 8) Awareness on local community, plantation, companies and travel and tourism trade
- 9) Providing of expertise knowledge on tea-tourism
- 10) Organize international tea conventions, tea forums and exhibitions to focus international tea trade people
- 11) Government leadership and necessary priority for tea-tourism

### **How does the Government Plan to Benefit the Local Communities to Develop Tea-tourism?**

Government has to give high priority to plantation community for the following areas:

- 1) Uplift their wealth, water supply, sanitation facilities and increasing their wedges
- 2) Local community must be educated on this tea-tourism



- 3) Create an opportunity to local people to enter into tourism business by giving proper awareness through mobilizing
- 4) Provide necessary awareness training to the plantation companies to enter into tourism business especially on the tea-tourism business and how this new market segment will create an impact to the country especially to the plantation companies and local community.
- 5) Taking initiatives to increase the productivity of tea industry will increase local communities' wealth
- 6) Provide loan schemes to the local people to start small level business on tea-tourism with low interest

### **Mechanism Suggested to Provide Maximum Benefits to the Local Community in Developing Tea-tourism**

Suitable mechanisms suggested by the TRBMO in order to give the maximum benefits to the local community in developing tea-tourism are described by the following:

That there was a necessity for Institutions to provide training to middle Mgt & local community and thereby creating additional income opportunities through establishment of small & medium enterprises. The introduction of modern technology in the tea industry through which the quality of the tea production could be increased and thereby enhancing the export of tea which would in turn increase foreign exchange earnings and thereby benefit the local communities.

The development of agro tourism including tea-tourism and other attributes like sight seeing & other tourism products would create more job opportunities and enhance rural income and improve the over all quality of lives for the local

population. At the same time income would be generated through sale of local products such as vegetable and dairy products, local handicrafts, show casing their tradition and culture which would provide an experience for the tourist and benefit the locals also at the hotels accommodating the tourist.

The quality of the social facilities such as clean drinking water, access to schools, hospitals and training opportunities should be available to the community to have a better quality of life. NGO's support could be sought to support social welfare schemes which directly impact of the poorer sections of the society. A social welfare schemes to be introduced by the tea industry by allocating percentage of their profits for the development and betterment of the local community in the tea industry.

That local community should be directly engaged in the sales outlet and such opportunities like training local entrepreneur, local guides, training on hospitality & product standards & language etc. would enable providing livelihood opportunities.

### **Government and Private Sector Partnership Proposed to Develop Tea-tourism**

The ways of government and private sector partnership for tea-tourism development suggested by TRBMO were summarized as follows:

- 1) All tea and travel trade stakeholders should be jointly worked together for the necessary development of tea-tourism by focusing common goal.

- 2) Respective government organizations should be providing the necessary leadership to the respective stakeholders to achieve the expected goals.
- 3) Respective government authorities should be lead to set up the rigid action plane by consulting other related stakeholders and to be implemented through proper continuous monitoring system.
- 4) Respective government authorities should be involved to form a
- 5) Task Force to implementation and monitoring of the tea-tourism development in the country.
- 6) After proper awareness of the related stakeholders for the tea-tourism development, Ministry of Tourism, Sri Lanka Tourism Development Authority and Sri Lanka Tea Board should be identify the respective stakeholders who wish to promote this segment and to be invest jointly by promoting the new segment.
- 7) Proper brand, marketing, promotional strategies to be jointly work with the all stakeholders together to promote the destination in abroad.
- 8) The respective government authorities relate to tea and tourism should educate and consult respective stakeholders when policy formulations for the development of tea-tourism.

### **Strength for Tea-tourism Development in Sri Lanka**

1. World largest tea exporter
2. World second largest tea producer
3. More than 140 old Colonial tea history
4. The renowned brand name "Ceylon Tea" popular world wide

5. Third foreign exchange earner to the country
6. Availability of well developed tea industry
7. Health benefit aspects (Act as a anti bacterial agent, reduce risk from many diseases, increase concentration, etc.)
8. Largest beverage consume by the people
9. Wide spread beautiful tea gardens, colonial tea plantation bungalows and tea factories, local hospitality, expertise knowledge and tea tradition

### **Opportunities for Tea-tourism Development in Sri**

#### **Lanka**

1. Minimum competition in tea-tourism market segment with other destinations
2. Availability of many tourism attraction places in tea plantation areas
3. Beautiful tea landscapes, unique climatic condition
4. There are many tea drinking communities in the world
5. Enough quality accommodations facilities in tea plantation areas
6. Diversified into many geographical areas
7. Foreign visitors will view this as a new niche market segment since this is new experience for them
8. Diversified tea products with different kind of taste and flavours

### **Weaknesses when promoting for Tea-tourism in**

#### **Sri Lanka**

1. Lack of coordination among stakeholders
2. No coordination between agencies responsible for tea & agencies responsible for promoting tourism

3. Lacking of new innovative ideas when creating a tourism products
4. Working as independently rather than working as a team by the respective stakeholders in tourism as well as in the tea-tourism
5. No proper marketing and product development strategy in tea-tourism
6. Lack of promotional opportunities in tea-tourism
7. Instability situation of the country due to terrorism
8. Not yet used satisfactory of the strength and opportunities that Sri Lanka has in tea-tourism context
9. Lack of financial support
10. Lack of research undertaken by focusing tea-tourism
11. No proper infrastructure facilities
12. No awareness on this new market segment especially for the plantation and local community
13. No proper quality standard products
14. No entertainment facilities
15. Conflict between tea plantation companies and plantation workers' unions
16. Lack of tourism literature available for tourists on tea-tourism

**Barriers, Problems and Resistant Factors Affects  
to the Tea-tourism  
Development**

- 1) Lack of financial support to start the new income generation opportunities for estate workers
- 2) Lack of efficient labours existing in the plantation sector
- 3) Lack of productivity
- 4) Infrastructure problems

- 5) Changing of climatic condition in tea plantation areas will affect to quality and taste of the tea
- 6) Malnutrition in the plantation sector
- 7) Lack of water supply and sanitation facilities
- 8) Lack of awareness on tourism and tea-tourism
- 9) Level education i the tea plantation sector
- 10) No strategic approach
- 11) Lack of coordination among partners in the tea-tourism sector
- 12) Lack of tea tourism events to attract tourists to the country

### **Suggestions to Overcome Barriers and Problems Barriers, Problems Affects to the Tea-tourism Development**

- 1) It is necessary to have a stable policies and action plan to meet the needs of overall development of tea-tourism
- 2) Strategic plan with specific initiatives must be drawn up involving all stakeholders in the tea-tourism
- 3) Close coordination should be maintain all the time with all stakeholders
- 4) Appropriate research has to be conduct to find the potential for tea-tourism
- 5) Task Force to be formed to monitor and implement the action plan representing representatives of all stakeholders.
- 6) Necessary to form a better marketing and promotional strategy short, medium and long term
- 7) Infrastructure and product development

- 8) Investigate the best practices from other similar countries those who are doing tea-tourism
- 9) Relevant government agencies should take the leadership
- 10) All government and private partners to be educated on new emerging concept & its benefits
- 11) Identify key tour operators who are willing to promote their tour packages and sell through their tour operators overseas
- 12) Jointly launch an advertising campaign overseas as well as locally in the available products in tea tourism
- 13) Introduce an annual event related to tea-tourism: Annual Tea Festival, Annual International Tea Symposiums with the participation of Key Celebrities from overseas & get tourists involved in the new segment

### **3.1.4 Researchers and Scholars**

The tea industry in Sri Lanka has over 140 year history. From the time it introduced to Sri Lanka till now it depict the huge development in the tea industry being a largest tea exporter in the world and also being the second largest tea producer in the world at present. This rapid development shows that Sri Lanka should have a well experience and knowledge on tea industry. As explained above tea-tourism in Sri Lanka is correlated with the knowledge and experience gained over the period of 140 years. Therefore, this study revealed that to evaluate the existing potential for tea-tourism, update the stakeholder list for tea-tourism and gathered the information for the SWOT analysis by getting such a knowledge and experience from the respective scholars with regards to the tea-tourism in Sri Lanka. Respective data were gathered by using semi

structured questionnaires as per the purposive sample method and as a result there are 30 scholars were able to interview to obtain respective data.

According to the capacity of involvement by the scholars in this study area, scholars were categorized into six groups as follows:

1. Tourism Researcher
2. Tourism Scholar
3. Tourism Trainer
4. Tourism Educator
5. Tourism Planner
6. Tourism Advisor

During the analysis of the data related to this study, researcher observed that there were some scholars involved in more than one areas of expertise area. Therefore, Table 3.53 describes the representation of the scholars who contributed to this study by giving their experience and knowledge in tea-tourism development.

As shown in Table 3.50, the respondent scholars comprised of the environmentalist who are working in the tourism training field, educators in the travel and tourism sector, universities, plantation sector, tea industry and advisors in the agriculture sector.



**Table 3.50** Representation of Researchers' & Scholars' Contribution to the Tea-tourism

| <b>Scholar Category</b> | <b>Researcher</b> | <b>Scholar</b> | <b>Trainer</b> | <b>Educator</b> | <b>Advisor</b> | <b>Planner</b> |
|-------------------------|-------------------|----------------|----------------|-----------------|----------------|----------------|
| Researcher              | 2                 | 2              |                | 1               | 1              |                |
| Scholar                 | 5                 | 2              |                | 1               | 2              | 2              |
| Trainer                 |                   | 1              | 1              | 1               |                |                |
| Educator                | 1                 | 1              |                | 2               |                |                |
| Advisor                 | 1                 | 1              |                |                 |                |                |
| Planner                 | 1                 | 1              |                |                 |                | 1              |
| <b>Total</b>            | <b>10</b>         | <b>8</b>       | <b>1</b>       | <b>5</b>        | <b>3</b>       | <b>3</b>       |

### **International Tea-tourism Market Potential (Researchers' & Scholars' View)**

According to the scholars' view, they replied that current international market potential for tea-tourism as "Excellent" at 27%, 30% as "Good", 43% as "No idea" since tea-tourism is a new market segment.

### **Market Potential for Tea-tourism in Sri Lanka (Researchers' & Scholars' View)**

As explained by the Table 3.51, the scholars responded that market potential for tea-tourism in Sri Lanka as "Excellent" with 67% while assessing the potential as "Good" with 33%. In other words, this depicted that there is a huge potential available for tea-tourism in Sri Lanka with regards to the international market potential.

### **Present Offers to Attract Tourists Under Tea-tourism in Sri Lanka (Researchers' & Scholars' View)**

The scholars were asked to comment whether the present offers are good enough to attract tourists under tea-tourism or not. Table 3.51 explained that, there are 53% were commented it is “Developing” while assessing the present offers are “Adequate/sufficient” with 47%. In other words, this shows that present offers are good enough to attract tourists and balance portion is developing to attract tourists under tea-tourism.

### **Marketing and Promotional Campaign by Sri Lanka on Tea-tourism (Researchers' & Scholars' View)**

Promotional campaigns in tourism are one of the most key factors of the development of tourism business. This correlates how successful of the business in tourism point of view. As explained by the Table 3.51, marketing and promotional campaigns doing by Sri Lanka on tea-tourism was commented by scholars as: 40% as “Poor”, 33% as “Good”, 17% as “Excellent” and 10% commented that they do not have idea on the above.

### **Current Tea-tourism Development in Sri Lanka (Researchers' & Scholars' View)**

Finally, Table 3.51 also explained the overall tea-tourism development in Sri Lanka as per the Scholars' view. The present situation of the tea-tourism development in Sri Lanka was commented by Scholars as: 47% as “It is developing”, 43% as “It is not developed” and 10% as “It is already developed”.

**Table 3.51** Summary of the Market Potential in the World and in Sri Lanka for Tea-tourism

| <b>No.</b> | <b>Area</b>   | <b>Status</b>       | <b>(%)</b> |
|------------|---|---------------------|------------|
| 1.         | Market Potential for International tea-tourism                  | Good                | 30         |
|            |   | Excellent           | 27         |
|            |   | No idea             | 43         |
| 2.         | Market Potential for International tea-tourism                  | Good                | 33         |
|            |   | Excellent           | 67         |
| 3.         | Impression on present offers for tea-tourism                    | Developing          | 53         |
|            |   | Adequate/Sufficient | 47         |
| 4.         | Impression on Marketing & Promotional Campaigns for tea-tourism | Excellent           | 17         |
|            |   | Good                | 33         |
|            |   | No idea             | 10         |
|            |   | Poor                | 40         |
| 5.         | Current ea-tourism development in Sri Lanka                     | Already developed   | 10         |
|            |   | Not developed       | 43         |
|            |   | Developing          | 47         |

### **Marketing and Promotion Perspectives Suggested by Researchers & Scholars**

Marketing and Promotion are the most important area of the tourism business. Having less attention on the any of the above will reflect in the decline of the business. Therefore, having stable marketing and promotion environment will give better results for the business. Therefore, by considering the importance and development in tea-tourism, following areas were suggested by scholars by considering the marketing and promotion perspectives for the improvement of this market:

1) All stakeholders should be educated to work on a common action plan for the above development through close cooperation and respective government organization should take the leadership to drive the industry towards the goal.

2) In order to do that, the respective government authorities should allocate financial amounts as a component partly with the respective stakeholders and should take an initiative to form a Task Force for the preparation, implementation and for monitoring of the marketing and promotion plan continuously and also suggested to get the feedback from the respective stakeholders for the preparation of the above. It is importantly mentioned by the scholars that the respective Task Force should be identified for the proper market segments and promotional tools and areas before preparation of the plan.

3) In this process, scholars suggested that SLTDA, MOT and Sri Lanka Tea Board should work closely together with respective stakeholders by formulating necessary policies on the above market segment.

4) The scholars indicated that to get support from the Sri Lanka missions abroad for the development of tea-tourism in a large scale by closely working with the Ministry of Foreign Affairs and Ministry of Commerce. They also commented that to get necessary support from the Foreign offices belongs to the SLTDA and Sri Lanka Tea Board for the future promotional programmes.

5) Formation of fund for the marketing and promotion programmes for each year by contributing by the government as well as the stakeholders in the industry.

### **New Potential Areas that can be Develop Tea-tourism**

The scholars identified two broader geographical areas: Up country and Low country to promote tea-tourism by considering the potential that the area having for tea-tourism as well as tourism. In up country Kandy, Nuwara Eliya, Maskeliya, Talawakele, Bogawantalawa, Pussellawa, Uva and Haputale were identified as potential area that can be develop tea-tourism while identified Rakwana, Morawaka and Hiniduma in low country.

### **Assessment of the Product Availability to Attract Tourists to Tea-tourism Sector**

This describes to what degree the country can have the ability to attract tourists to the respective tea destinations under tea-tourism. According to the scholars' assessment, forty seven% rated that exiting tourism products are "Strongly Enough" to attract tourists to country while twenty seven% as "Enough", seventeen% as "Moderately Enough" and ten% as "Not Enough". In other words, this depicted that nearly seventy three% commented that the existing tourism products are enough to attract tourists to country for tea-tourism.

### **Suggestions Made by Scholars if the Existing Tourism Products are not Enough to Promote Tea-tourism**

Scholars recommended that the following suggestions as per the scholars who responded on the existing tourism products are moderately enough or not enough to attract tourists for tea-tourism in Sri Lanka. They recommended the need to upgrade the existing tourism products: infrastructure i.e. roads, better restaurants, standard hotels and to identify new

tourism products: entertainments facilities, tea shops, domestic air planes, home stays, theme parks, tea night, tea festivals, serve tea as a welcome drink, awareness the tourists on by focusing health aspects of tea, Souvenirs made from tea commodities and create tea culture in the hotels.

### **Assessment of the Improvement of Tea-tourism**

The scholars were asked to indicate their judgment to improve tea-tourism in Sri Lanka as per the given questionnaire and their judgments were shows by Table 3.52 according to the priority area.

**Table 3.52** Assessment of the Improvement of Tea-tourism (Researchers' & Scholars' View)

| <b>Area of Improvement</b>  | <b>Rank</b> |
|---|-------------|
| 1. Stakeholder cooperation  | 1           |
| 2. Others (Product development)   | 1           |
| 3. Constructing highways from airport and other destinations to hill country          | 2           |
| 4. Introduce and upgrade railway transport system in hill country                     | 2           |
| 5. Infrastructure and facility development  | 2           |
| 6. Required marketing and promotion in abroad   | 3           |
| 7. More government involvement on tea-tourism   | 3           |
| 8. Concessionary loan scheme with low interest rates for tourism related stakeholders | 3           |
| 9. Construct of luxury hotels   | 4           |

### **Activities, Facilities and Services Suggested by Scholars to Positioning Sri Lanka as a Tea-tourism Destination**

There can be a one or more purposes holiday, visiting friends and relatives, vacation, business or MICE (Meetings, Incentives, Conventions and Exhibitions) will behind tourists' visiting any destination. Apart they, activities, facilities and services play a major role to offer a maximum satisfaction during their stay. As such, scholars were suggested the following to positioning Sri Lanka as a tea-tourism destination as shown in Table 3.53.

**Table 3.53** Activities, Facilities and Services Suggested by Researchers' & Scholars' to Position Sri Lanka as a Tea-tourism Destination

| <b>Suggestions</b>   |
|--|
| <p><b>Activities</b></p> <ol style="list-style-type: none"> <li>1. Tea Festivals</li> <li>2. Take tourists to show Colombo tea auction</li> <li>3. Arrange time to tourists to plucking tea with plantation workers</li> <li>4. Demonstrate to make good cup of tea to the tourists</li> <li>5. Demonstrate how tea developed during the British period up to now</li> <li>6. Designate "Brand Ambassador" for the tea industry</li> <li>7. Organize FAM tours (Familiarization tours) to leading film producers, journalists and film stars</li> <li>8. Use Sri Lankan Cricket team in the Cricket loving and tea loving countries</li> <li>9. Form a Tea Competition annually in abroad</li> <li>10. Get awareness of tourists about how tea beneficial for our health</li> <li>11. Invite World tea conventions, exhibitions, conference organizers to visit Sri Lanka</li> </ol> |
|  |

**Facilities**

1. Welcome all tourists by offering Tea as a welcome drink at hotel & other places
2. Introduce new Theme Parks in tea plantation areas
3. Introduce “Cable Car System” in proper tea plantation elevations
4. Tea Centres, Tea shops and restaurants with entertainment facilities (eg. Musical band, facilitate to play “Snooker”)
5. Quality hotels suitable to the environment in the hill country
6. Introduced shopping malls

**Services**

1. Souvenir shops, Internet cafes, Transport providers, Information centres
2. Trained tour guides on tea-tourism
3. Domestic air transportation e.g. small air planes, sea planes
4. Upgrade and introduced new railway system

**Initiatives Suggested by Researchers & Scholars  
to Get the Involvement of the Local Community  
to the Product Development Process**

The future development of the tea industry and the tourism industry are depend on the degree that how the community get benefits from these sectors. Therefore, by looking at this Scholars were commented: to support to give a different experience from tea bungalow to tea farm stay to the local community from low grown to mid grown tea plantation areas, to awareness the local community on tourism business by the respective government and private sector authorities, to give incentives to involve local community to the small and medium enterprises on tourism, to provide skill development training on product development eg. Interpreters, language training, hotel



staff training, etc. The scholars were suggested to form a Satellite school or similar body to train required people for the tourism sector in the plantation areas to involve them to tourism development process. This will help to increase the wealth of the people in the plantation area.

### **Partnership between Public and Private Sector Partnership in Tourism**

Any business can not exist if there is no any partnership between respective stakeholders. Likewise tourism business is the same. There are public and private stakeholders who exist in any form of tourism business and their functional levels are different from each other. The degree of partnership between these two different sectors affects the success of the tourism business. The scholars were commented that the partnership between above sectors as “Excellent” at 27% while 47% as “Good”, 20% as “Poor” and 6% as “No idea”. In other words, 74% of the responded had an impression on above two sectors having positive partnership in tourism business.

### **Partnership between Public and Private Sector Partnership in Tourism**

Similar to the above, the degree of partner ship between private and public sectors affects to the success of the tea-tourism business as well. The scholars were commented that the partnership between above sectors as “No idea” at 40% while 27% as “Good”, 13% as “Excellent” and “Poor” and 7% as “Very Poor”. In other words, 40% of the responded had an impression on above two sectors does not have such a big partnership in tea-tourism business.

**Proposed Organizations Work Together in Tea-tourism  
(Researchers' & Scholars' View)**

Respective officers were asked to recommend the organizations should work together with them in the development of tea-tourism and the respective responses are ranked Table 3.54. There are five organizations: MOT, STDA, Sri Lanka Tea Board, MOP, PC and private sector (Travel & Tourism industry) identified by the respondents as top priority (100%) organizations should work together while Plantation companies, PRC's, TSHDA and PA were proposed by the respondents to work very close together in addition to the above stakeholders in tea-tourism development in Sri Lanka.

There are a range of stakeholders who are operational in the tea-tourism sector and their contribution to the sector will vary from the type of organization. Therefore, the stakeholder list shown by Table 3.54 is facilitating to know the most important stakeholders working together in the tea-tourism development in Sri Lanka.

**Table 3.54** Recommended Organizations to Work Together

| No. | Organizations Work Together  | “Yes”-<br>Number | (%) |
|-----|--|------------------|-----|
| 14. | NGOs   | 14               | 47  |
| 15. | Others (Tea Exporters Association, Colombo Tea Traders Association, Tea Factories, Academic Institutions ) | 14               | 47  |
| 16. | Road Development Authority (RDA)   | 13               | 43  |
| 17. | Water Board (WB)   | 12               | 40  |
| 18. | Environment Concern NGOs   | 12               | 40  |
| 19. | Municipalities   | 12               | 40  |
| 20. | Ceylon Electricity Board (CEB)   | 10               | 33  |

**Table 3.54** (Continued)

### **Expected Roles to Play by MOT and SLTDA for the Tea-tourism Development**

Future development of the tea-tourism as well as the whole tourism industry, respective government bodies should have to play a major role for the development of these sectors. During the study, Scholars were asked to comment important two responsibilities they expect from MOT and SLTDA for the

| No. | Organizations Work Together                     | “Yes”-<br>Number | (%) |
|-----|---|------------------|-----|
| 1.  | Ministry of Tourism (MOT)                       | 30               | 100 |
| 2.  | Sri Lanka Tourism Development Authority (STDA)  | 30               | 100 |
| 3.  | Sri Lanka Tea Board                             | 30               | 100 |
| 4.  | Ministry of Plantation Industries (MOP)         | 30               | 100 |
| 5.  | Plantation Companies (PC)                       | 29               | 100 |
| 6.  | Private Sector (Travel & Tourism Sector)        | 30               | 100 |
| 7.  | Provincial Councils (PRC)                       | 26               | 87  |
| 8.  | Tea Small Holders Development Authority (TSHDA) | 24               | 80  |
| 9.  | Planters Association (PA)                       | 20               | 67  |
| 10. | Tea Research Institute (TRI)                    | 19               | 63  |
| 11. | Central Environment Authority (CEA)             | 15               | 50  |
| 12. | CBO of Tea Small Holders                        | 18               | 60  |
| 13. | Agriculture Department (AD)                     | 17               | 57  |

development of this sector in priority basis. As explained by Table 3.55, nearly 36% recommended first priority as of

“Marketing & Promotions” followed by 21% as “Be a facilitator”, 14% as “Be a policy formulator” as well as “Planning”, 7% as be a “Coordinator” as well as a “Partner” as a role under the first priority of the above organizations in tea-tourism development. When combining both first and second priority, nearly 29% of them selected “Marketing & Promotions” as a rank 1 and nearly 18% selected to be a “Policy formulator” and “facilitator” as a rank 2 for the tea-tourism sector. Similarly, nearly 11% selected “Planning” as a rank 3 in tea-tourism development.

**Table 3.55** Expected Roles to Play by MOT and SLTDA for Tea-tourism Development

| Role of MOT and SLTDA in tea-tourism | First priority |            | Second priority |            | Total     |            | Rank |
|--------------------------------------|----------------|------------|-----------------|------------|-----------|------------|------|
|                                      | N              | (%)        | N               | (%)        | N         | (%)        |      |
| Marketing & Promotions               | 10             | 35.7       | 6               | 21.4       | 16        | 28.6       | 1    |
| Be a policy formulator               | 4              | 14.3       | 6               | 21.4       | 10        | 17.9       | 2    |
| Be a facilitator                     | 6              | 21.4       | 4               | 14.3       | 10        | 17.9       | 2    |
| Planning                             | 4              | 14.3       | 2               | 7.1        | 6         | 10.7       | 3    |
| Be a coordinator                     | 2              | 7.1        | 3               | 10.7       | 5         | 8.9        | 4    |
| Be a partner                         | 2              | 7.1        | 1               | 3.6        | 3         | 5.4        | 5    |
| Research                             | -              |            | 3               | 10.7       | 3         | 5.4        | 5    |
| Be a Catalyst                        | -              |            | 2               | 7.1        | 2         | 3.6        | 6    |
| <b>Total</b>                         | <b>28</b>      | <b>100</b> | <b>28</b>       | <b>100</b> | <b>56</b> | <b>100</b> |      |

**Remarks:** MOT: Ministry of Tourism; SLTDA: Sri Lanka Tourism Development Authority

### **Expected Roles to Play by Sri Lanka Tea Board, TSHDA, MPI and DOA for the Tea-tourism Development**

MOT and SLTDA plays a major role in the tourism development in the country. Likewise, Sri Lanka Tea Board, TSHDA and DOA are the key organizations in the tea development in the country in the area of policy formulation, marketing, promotions, planning, etc. For the tea-tourism development in the country, the above key organizations which involved in tourism and tea have to play their roles in different aspects. By considering these aspects, scholars have suggested to undertake set of roles as mentioned in Table 3.56 as priority basis.

As explained by Table 3.56, nearly 28% recommended as a first priority as of be a “Policy formulator” followed by 17% as be a “Facilitator” role, nearly 14% as be a “Coordinator” and being undertaking “Marketing & Promotions”, 10% as being undertaking “Planning” and “Development & Implementation” and nearly 7% as being undertaking “Resource identification” as a role under the first priority in tea-tourism development. When combining both first and second priority, nearly 22% of them selected be a “Policy formulator” as a rank 1 and nearly 16% selected to being undertaking “Marketing & Promotions” as a rank 2 followed by nearly 14% as being a “Facilitator” having rank 3, 10% as being a “Coordinator” and being undertaking “Planning” and “Development & Implementation” with rank 4 in tea-tourism development.

**Table 3.56** Expected Roles to Play by Sri Lanka Tea Board, TSHDA, MPI and DOA for Tea-tourism Development

| Role of SLTB, TSHDA, MPI and DOA in tea-tourism | First priority |            | Second priority |            | Total     |            | Rank |
|---|----------------|------------|-----------------|------------|-----------|------------|------|
|   | N              | (%)        | N               | (%)        | N         | (%)        |      |
| Be a policy formulator                          | 8              | 27.6       | 5               | 17.2       | 13        | 22.4       | 1    |
| Marketing & Promotions                          | 4              | 13.8       | 5               | 17.2       | 9         | 15.5       | 2    |
| Be a facilitator                                | 5              | 17.2       | 3               | 10.3       | 8         | 13.8       | 3    |
| Be a coordinator                                | 4              | 13.8       | 2               | 6.9        | 6         | 10.3       | 4    |
| Development and Implementation                  | 3              | 10.3       | 3               | 10.3       | 6         | 10.3       | 4    |
| Planning  | 3              | 10.3       | 3               | 10.3       | 6         | 10.3       | 4    |
| Research  |                | -          | 4               | 13.8       | 4         | 6.9        | 5    |
| Resource identification                         | 2              | 6.9        | 1               | 3.4        | 3         | 5.2        | 6    |
| Be a partner                                    |                | -          | 2               | 6.9        | 2         | 3.4        | 7    |
| Be a Catalyst                                   |                | -          | 1               | 3.4        | 1         | 1.7        | 8    |
| <b>Total</b>                                    | <b>29</b>      | <b>100</b> | <b>29</b>       | <b>100</b> | <b>58</b> | <b>100</b> |      |

**Expected Roles to Play by Private Sector Stakeholders i.e. Tourism & Hospitality Industry, Tea Plantation Industry and Other Stakeholders in Tea-Tourism Development**

Apart from the government involvement to tea-tourism, private sector stakeholders in the tourism and hospitality industry, tea plantation industry and other related stakeholders in the tea-tourism development play a major role since majority of them are directly benefiting from this new market segment by providing necessary services and facilities for the consumers through operation of all activities pertaining to the consumers. By considering these aspects, scholars have suggested following set of roles as mentioned in Table 3.57 and most of them suggested more than one role which to be

undertake by private sector stakeholders. As explained by Table 3.57, all scholars were suggested that all stakeholders in the above category should be jointly work together for the necessary development through active participation followed by 80% commented that these stakeholders should be closely working together with the government tourism authorities. In addition to the above scholars were commented that above stakeholders should “Maintain the quality of the product and services in the product development”, “Contribute to protect the resources and environment belongs to the sector” and “Joint marketing & promotions” with 73%, 70% and 60% respectively as a major role of them.

**Table 3.57** Expected Roles to Play by Private Sector Stakeholders i.e. Tourism & Hospitality Industry, Tea Plantation Industry and other Related Stakeholders in Tea-tourism Development

| <b>Role of Private Sector Stakeholders i.e. Tourism &amp; Hospitality Industry, Tea Plantation Industry and other related stakeholders</b>  | <b>Number</b> | <b>(%)</b> | <b>Major Role</b> |
|---|---------------|------------|-------------------|
| Jointly Work together for the necessary development of tea-tourism with all private sector stakeholders i.e. Hospitality industry, Tea Plantation industry, other related stakeholders through active participation | 30            | 100        | *                 |
| Working closely with government tourism authorities   | 24            | 80         | *                 |
| Play a major role to share more benefits from each industry   | 11            | 37         |                   |
| Joint Marketing & Promotions of tea-tourism sector rather than self promotions  | 18            | 60         | *                 |
| Contribute to protect the resources and environment belong to the sector  | 21            | 70         | *                 |
| Maintain the quality of product and services in   | 22            | 73         | *                 |

|  |   |    |  |
|--|---|----|--|
| the product development in tea-tourism development                                       |   |    |  |
| Formulation of think-tank together new ideas for the further development of this segment | 8 | 27 |  |
|  |   |    |  |

**Remarks:** More than one suggestions were commented by scholars; \* - Major role of stakeholders

### **Expected Roles to play by Local Community in the Plantation Sector, Community Based Organizations (CBO's), NGO's and Unions of the Tea Plantation Sector in Tea-tourism Development**

Local community is the one of the major stakeholder category in the tea-tourism development in the country being directly involved especially in the tea industry. Offering maximum benefits to the community is one of the main components in the sustainable tourism development. Community based organizations (CBO's), NGO's and Tea Plantation unions can play a major role to get the maximum benefits to the local community and also to the development of the tea-tourism in the country. Therefore, by considering these aspects, scholars have suggested following set of roles as mentioned in Table 3.58 and most of them suggested more than one role which to be undertake by private sector stakeholders.

As explained by Table 3.58, 97% of the scholars were suggested that all stakeholders in the above category should be work join hand with travel & tourism companies followed by 87% as "Contribute to protect the resources and environment in tea-tourism" , 83% as "Work join hand with tea plantation companies", 80% as "Working closely together with provincial level or government tea & tourism authorities" and 53% as the mentioned stakeholders can "do the awareness to the local community by get support from respective government



authorities, travel & tourism sector companies and tea plantation companies” as a major role of them.

**Table 3.58** Expected Roles to Play by Local Community in the Tea Plantation Sector, Community Based Organizations (CBO’s), NGO’s and Unions of the Tea Plantation Sector in Tea-tourism development

| <b>Role of Local Community in the Plantation Sector, Community Based Organizations (CBO’s), NGO’s and Unions of the Tea Plantation Sector</b>   | <b>Number</b> | <b>(%)</b> | <b>Major Role</b> |
|---|---------------|------------|-------------------|
| Working closely together with provincial level or government tea & tourism authorities  | 24            | 80         | *                 |
| Work join hand with travel & tourism companies  | 29            | 97         | *                 |
| Work join hand with tea plantation companies  | 25            | 83         | *                 |
| Work join hand with among each CBO’s or NGO’s, tea plantation unions related to this segment  | 8             | 27         |                   |
| Play a major role to share more benefits from tea-tourism industry  | 13            | 43         |                   |
| CBO’s, NGO’s and tea plantation unions can do the awareness to the local community by get supporting from respective government authorities, travel & tourism sector companies and tea plantation companies | 16            | 53         | *                 |
| Contribute to protect the resources and environment in tea-tourism  | 26            | 87         | *                 |
| Working closely with the respective government authorities and financial institutions to enter to the tourism business opportunities by local communities   | 18            | 60         | *                 |

**Remarks:** More than one suggestions were commented by scholars, \* - Major role of stakeholders

### **Expected Roles to be Played by Political Leadership to the Development of Tea-tourism**

Political leadership can play a major impact for the development of tea-tourism in the country in different ways. Therefore, by considering these aspects, scholars have suggested the following set of roles from the political leadership in the country:

1. Development of the infrastructure and tourism in the tea plantation area
2. Obtaining the high priority in the government development plan in connection with tea-tourism development
3. Employed political leadership to incorporate tea-tourism into overall tourism strategy in Sri Lanka
4. Use of political leadership, to do publicity, awareness the people, promotional activities in the tea-tourism.
5. Providing necessary leadership for the tea-tourism development in the country
6. Getting required financial support from the government to the development of tea-tourism
7. Facilitate to the investment opportunities to the investors in tea and tourism development
8. Getting maximum benefits to the local community in tea-tourism segment

### **Factors Necessary to Incorporate Tea-tourism into the Overall Tourism Strategy- Researchers' & Scholars' View**

The scholars were identified that the both tea and tourism sectors have not incorporated with each other hence will negatively affect to the tea-tourism development in the country. Therefore, following broader areas were suggested by the scholars to incorporate both sectors mentioned above.

#### **1) Joint Promotions & Marketing**

There are many stakeholders involved in the tourism sector i.e. MOT, SLTDA, SLCB, Provincial Councils, hotels, travel agents, guest houses, restaurants, transport providers, tour interpreters, etc. Like wise many stakeholders are involved in the tea plantation sector i.e. Sri Lanka Tea Board, TSHDA, MPI, DOA, Provincial Councils, tea plantation companies, tea traders, tea factories, etc. Though each sectors contributes to tea-tourism, the respective marketing and promotions done by the each sector by their own. Though their sectors are different having joint promotions and marketing programme will impact the both sectors and as a result it will positively impact to the tea-tourism development through better cooperation among two sectors. According to the annual promotions in abroad, each sectors participates trade fairs, exhibitions, annual conferences, etc every year without having any joint participation with each other. By considering these, scholars suggested that to formulate a mechanism to participate by stakeholders in each sectors events by stakeholders in other sector by facilitating each respective government organization in each sector. In addition to that there are many tea related annual conferences, annual

exhibitions happening all over the world. Researchers & Scholars suggested that to facilitate to bringing such an event to Sri Lanka by working together with responsible companies or organization in each sector hence both sector will benefiting through this kind of a process and finally it will impact to promote tea and tourism in the country as well.

## 2) Product Development

Kotler *et al.* (1996) write that a product is anything that may be offered to a market to satisfy a need or want. And also products are goods and services and from those, tourism products might more appropriately be viewed as services, instead of goods, because tourism is an experiential phenomenon that brings people and places together over defined period of time.

By considering above, scholars suggested that under the leadership of respective government authorities in tea and tourism sector, all private sector stakeholders in travel and tourism i.e. hotels, guesthouses, restaurants, shops, transport providers, travel agents, etc., tea plantation sector i.e. plantation companies, tea factories, tea traders, etc and local community should be jointly involved with suitable mechanism to the product development process in the tea-tourism. For this, the respective government authorities mentioned above and the associations related to the above stakeholder areas can play a major role under the product development to incorporate tea-tourism into overall tourism strategy. Since tea is one of the main products in tea-tourism, scholars suggested that to more focus on activities with relates to tea such as tea festivals, tea day, tea food festivals, etc. by joining with respective stakeholders in both sectors. In addition to that to get the involvement of the local people to this process, scholars suggested that help local people to enter into the tourism business i.e. creation of souvenirs, start of tourist shops,

restaurants, etc. under the leadership of the respective government authorities with other stakeholders by considering the product development. And also they suggested that respective authorities in the travel and tourism sector and tea sector can develop their products i.e. creative tour itineraries, creative tourist brochures, tourist information centers, construction of view points in tea plantation areas, introduce more entertainment activities, creating tea culture a hotels and restaurants especially in tea plantation areas, introduce cyber cafes, increase more transportation facilities, establish tea shops, theme parks, under the leadership of respective government authorities in both sectors to incorporate tea-tourism into overall tourism strategy.

### 3) Awareness Programs

Scholars commented that awareness programs can play a major role to incorporate tea-tourism into overall tourism strategy through proper priority of the respective government authorities in both sectors by awareness stakeholders in the tea plantation sector, travel and tourism sector, local community and tourists since this is a new market segment. Since tea is one of the major products in tea-tourism, hotels, airlines, tour operators, travel agencies can do various kinds of awareness programs mentioned bellow in connection with tea-tourism with the assistance of the respective stakeholders in the tea industry.

1. Awareness of health benefit aspects of tea
2. Awareness of how to make a good cup of tea
3. Awareness of making curries by using tea
4. Awareness of wellness and spa trough tea

In addition to that scholars suggested that offer cup of tea in the flights with the brand name of “Ceylon Tea” for every visitor travels to Sri Lanka with the cooperation of respective stakeholders in the travel, tourism and tea sectors

under the leadership of respective government authorities in both sectors in order to incorporate tea-tourism into overall tourism strategy.

### **Strength of Tea-Tourism Development in Sri Lanka-Researchers & Scholars View**

1. World largest tea exporter
2. World second largest tea producer
3. Strong brand name “Ceylon Tea”
4. Colonial tea history
5. Rich bio diversity with too many tourist attractions
6. Sufficient labour force in the tea industry

### **Opportunities for Tea-tourism Development in Sri Lanka**

#### **Lanka**

1. Largest beverage consume by the people
2. High demand for tea
3. World trend for nature, wellness and spa
4. Health benefit aspects (Act as a anti bacterial agent, reduce risk from many diseases, increase concentration, etc.)
5. New niche market segment for tourists
6. Enough quality accommodations facilities in tea plantation areas

### **Weaknesses when Promoting for Tea-tourism in Sri Lanka**

#### **Sri Lanka**

1. Lack of coordination between respective authorities in tea, travel an tourism sector
2. No government priority for tea-tourism development
3. Lack of financial support for local community for new business in tea-tourism
4. Lack of entertainment facilities

5. Lack of value added products and quality souvenirs
6. Lack of quality transport providers
7. Poor incorporation between tea and tourism sectors
8. Less strategic approach
9. Lack of tea shops
10. Lack of tourism events
11. No proper promotion by targeting this market segment
12. Lack of tourist information centres
13. No proper shopping malls in tea plantation areas
14. Less awareness for tea-tourism among stakeholders and local community
15. Less priority for tea in travel and tourism industry
16. Lack of new innovating ideas in tea-tourism

### **Barriers, Problems and Resistant Factors Affects to the Tea-tourism Development**

1. Changing of climatic condition in tea plantation areas will affects to quality and taste of the tea
2. No proper facilities for the communities in the tea plantation areas
3. Lack of coordination between respective authorities in tea, travel an tourism sector
4. No government priority for tea-tourism development
5. Lack of research undertaken focusing product development
6. Lack of infrastructure development
7. No proper promotion and marketing programme for tea-tourism
8. Lack of financial support to start the new income generation opportunities in tourism for estate workers

## 9. Lack of awareness on tea-tourism

### **Suggestions to Overcome Barriers and Problems Affects to the Tea-tourism Development**

1. Close coordination should be maintain all the time with all stakeholders
2. Relevant government agencies should take the leadership
3. Necessary to form a better marketing and promotional strategy short, medium and long term
4. Infrastructure and product development
5. Task Force to be formed to monitor and implement the action plan representing representatives of all stakeholders.
6. Investigate the best practices from other similar countries those who are doing tea-tourism
7. Identify key tour operators who are willing to promote their tour packages and sell through their tour operators overseas
8. It is necessary to have a stable policies and action plan to meet the needs of overall development of tea-tourism
9. Strategic plan with specific initiatives must be drawn up involving all stakeholders in the tea-tourism



### 3.1.5 Tourism Service Providers

Among the selected stakeholders in this study, Tourism Service Providers play a major role in the any form tourism industry. They act as main key players in the tourism industry. Though the market segment in this study is tea-tourism, Stakeholders in Tourism sector have to play a big role in this niche market.

Table 3.59 describes the type of services provide to the tourists by the respondent Tourism Service Providers. The Table 3.59 shows that eighty-seven of the respondents act as a tour operator, sixty-seven as accommodation providers, and forty- three as a tour guides, thirty-seven as Travel Agents, thirty as a vehicle rental companies, twenty-three as restaurants and tourist shops in the field of tourism service providers.

**Table 3.59** Type Services Provide to the Tourists

| <b>Type Service</b> | <b>Number</b> | <b>(%)</b> |
|---------------------|---------------|------------|
| Tour Operator       | 26            | 87         |
| Travel Agent        | 11            | 37         |
| Accommodation       | 20            | 67         |
| Vehicle Rental      | 9             | 30         |
| Restaurants         | 7             | 23         |
| Tour Guide          | 13            | 43         |
| Tourists Shops      | 7             | 23         |
| Sample Size: 30     |               |            |

### 3.1.5.1 Awareness on Agro-tourism and Tea-tourism (Tourism Service Providers' View)

Table 3.60 shows that the degree of awareness on the agro-tourism and Tea-tourism segments by the Tourism Service Providers. The above table shows that 70% of the respondents awareness on the agro-tourism while 63% awareness on tea-tourism and balance of each responded that they have "Fair knowledge" on agro-tourism and tea-tourism.

**Table 3.60** Awareness on Agro-tourism and Tea-tourism

| Response       | Awareness on Agro-tourism |            | Awareness on Tea-tourism |            |
|----------------|---------------------------|------------|--------------------------|------------|
|                | Number                    | (%)        | Number                   | (%)        |
| Do not know    | -                         | -          | -                        | -          |
| Fair knowledge | 9                         | 30         | 11                       | 37         |
| Ys, I know     | 21                        | 70         | 19                       | 63         |
| <b>Total</b>   | <b>30</b>                 | <b>100</b> | <b>30</b>                | <b>100</b> |

### 3.1.5.2 Assessment on Economic Impact of Tea-tourism Service (Tourism Providers' View)

Based on the experience of the respondents who are in the travel and tourism trade Table 3.61 describes their perception on the tea-tourism segment. According to the results reflected in the Table 3.61, the following characteristics rated by the respondents as "Strongly Agree" level: "There is substantial market for tea-tourism", "Our tea plantations have a unique quality to attract tourists", "We have many attractions to draw

more tourists to tea-tourism”, “We can promote Sri Lanka as a tea-tourism destination in the tourism sector”, “International promotion on tea help to promote tea-tourism in Sri Lanka”, “International and local marketing campaign is needed to develop tea-tourism”.

**Table 3.61** Assessment on Economic Impact of Tea-tourism (Tourism Service Providers’ View)

| Key Factors   | Mean | S.D. | Level of Agreement |
|---|------|------|--------------------|
| There is substantial market for tea-tourism   | 4.47 | 0.51 | Strongly Agree     |
| Our tea plantations have a unique quality to attract tourists   | 4.47 | 0.51 | Strongly Agree     |
| Marketing and promotion campaigns doing by Sri Lanka is satisfactory to attract more tourists to tea-tourism sector | 2.23 | 0.43 | Disagree           |
| We have many attractions to draw more tourists to tea-tourism   | 4.27 | 0.45 | Strongly Agree     |
| Tea-tourism is best segment to develop tea plantation areas   | 3.53 | 1.28 | Agree              |
| Tea-tourism is not developed in Sri Lanka   | 3.70 | 0.79 | Agree              |
| Tea plantation sector has no awareness on tea-tourism   | 3.50 | 1.04 | Agree              |
| Tea-tourism is a new market for us  | 3.60 | 0.93 | Agree              |
| Formulation of government policy on tea-tourism can highly impact on the development of tea-tourism                 | 3.93 | 0.98 | Agree              |
| We can promote Sri Lanka as a tea-tourism destination in the tourism sector   | 4.40 | 0.50 | Strongly Agree     |
| International promotion on tea help to promote tea-tourism in Sri Lanka   | 4.23 | 0.68 | Strongly Agree     |
| International and local marketing campaign is needed to develop tea-tourism   | 4.83 | 0.38 | Strongly Agree     |

The following characteristics were rated by visitors as “Agree” level as per their perception on tea-tourism: “Tea-tourism is best segment to develop tea plantation areas”, “Tea-tourism is not developed in Sri Lanka”, “Tea plantation sector has no awareness on tea-tourism”, “Tea-tourism is a new market for us”, “Formulation of government policy on Tea-tourism can highly impact on the development of tea-tourism”. Since “Marketing and promotion campaigns doing by Sri Lanka is satisfactory to attract more tourists to tea-tourism sector” rated by above respondents as “Disagree” level this reflects that current marketing and promotion campaign are not satisfactory to attract tourists to tea-tourism in Sri Lanka.

### 3.1.5.3 Market Potential for Tea-tourism (Tourism Service Providers’ View)

The Table 3.62 illustrated the degree of potentiality currently exists for tea-tourism in Sri Lanka. As per the table 50% of the responded commented that there is “Average” potential exists for tea-tourism sector while commenting “Very High” by 43.3% and “Very Low” by 6.7%.

**Table 3.62** Market Potential for Tea-tourism (Tourism Service Providers’ View)

| Market Potential | Number    | (%)        |
|------------------|-----------|------------|
| Very High        | 13        | 43.3       |
| Average          | 15        | 50.0       |
| Very Low         | 2         | 6.7        |
| Nil              | -         | -          |
| <b>Total</b>     | <b>30</b> | <b>100</b> |

### 3.1.5.4 Assessment of Product Development in Tea-tourism (Tourism Service Providers' View)

As per the Table 3.63, study describes the assessment of the product existing in tea-tourism sector. The following characteristics were rated by respondents as “Strongly Agree” level as per their perception related to tea-tourism: “Related tourism product to be developed before promote tea-tourism” and “New tour packages to be introduced and develop existing packages on tea-tourism” as per the Likert Scale. The respondent were rated “Many agro products available in the tea plantation area” and “Quality of the accommodation places in tea plantation areas suitable for cater to tourists under tea-tourism market segment” as “Agree” level.

**Table 3.63** Assessment of Product Development in Tea-tourism

| Key Factors   | Mean | S.D. | Level of Agreement |
|---|------|------|--------------------|
| Related tourism product to be develop before promote tea-tourism  | 4.83 | 0.59 | Strongly Agree     |
| New tour packages to be introduced and develop existing packages on tea-tourism   | 4.57 | 0.50 | Strongly Agree     |
| Many agro products available in the tea plantation area   | 3.47 | 0.86 | Agree              |
| Quality of the accommodation places in tea plantation areas suitable for cater to tourists under tea-tourism market segment | 3.60 | 0.86 | Agree              |

### 3.1.5.5 Assessment of the Existing Services Available in Tea-tourism

Service is one of the key factors affected to satisfy the visitors during their stay. Therefore, Table 3.64 describes the perception of the Tourism Service Providers' on the existing service available for tea-tourism. As per the Table 3.64, study describes the assessment of the existing services available in tea-tourism sector. The following characteristics were rated by respondents as "Good" as per their perception related to tea-tourism: "Accommodation/lodging", "Range of Foods", and "Electricity". In addition to that "Tourist Information Centres", "Tourist Police Posts" and "Entertainment" were rated by them as "Unsatisfactory". This reflected that there is a necessity of "Tourist Information Centres" and "Tourist Posts" in tea-tourism areas.

**Table 3.64** Assessment of the Existing Service Available in Tea-tourism

| Key Factors                 | Mean | S.D. | Level of Agreement |
|-----------------------------|------|------|--------------------|
| Accommodation/lodging       | 4.50 | 0.82 | Good               |
| Infrastructure              | 3.93 | 0.98 | Satisfactory       |
| Water Supply and Sanitation | 4.23 | 0.77 | Satisfactory       |
| Restaurants                 | 4.03 | 0.67 | Satisfactory       |
| Transportation              | 4.10 | 1.09 | Satisfactory       |
| Security and Safety         | 4.30 | 0.99 | Satisfactory       |
| Tourist Shops               | 3.70 | 0.60 | Satisfactory       |
| Souvenirs                   | 3.53 | 0.63 | Satisfactory       |
| Tourist Information Centres | 3.17 | 0.70 | Unsatisfactory     |
| Tourist Police Posts        | 2.93 | 0.87 | Unsatisfactory     |
| Tourist Guides              | 4.00 | 0.87 | Satisfactory       |
| Range of Foods              | 4.70 | 0.99 | Good               |
| Entertainment               | 3.43 | 1.04 | Unsatisfactory     |
| Spa Services                | 3.93 | 1.39 | Satisfactory       |

|                          |      |      |              |
|--------------------------|------|------|--------------|
| Attractive Tour Packages | 3.93 | 0.94 | Satisfactory |
| Electricity              | 4.63 | 0.56 | Good         |

### 3.1.5.6 Assessment of the Degree of Priority for Improvement of Tea-tourism

The Table 3.65 describes the degree of priority for improvement of tea-tourism as per the Likert scale. As per the Table 3.65 respondents were commented that the level of important as “Medium” level for the “Construction of luxury hotels”, “Introduce home stays in the tea plantations or suborn area”, “Introduce Agro Parks or Theme Parks” and other rest of the areas were commented at “High” level important. This reflects that how such a development necessary for the future tea-tourism development in the country.

**Table 3.65** Assessment of the Degree of Priority for Improvement of Tea-tourism

| Key Factors  | Mean | S.D. | Level of Agreement |
|--|------|------|--------------------|
| Required marketing and promotion in abroad                       | 3.00 | 0    | High               |
| Construction of luxury hotels                                    | 1.80 | 0.71 | Medium             |
| Introduce home stays in the tea plantations or suborn area       | 2.03 | 0.93 | Medium             |
| Introduce Agro Parks or Theme Parks                              | 2.00 | 0.91 | Medium             |
| Create more activities on tea-tourism                            | 2.93 | 0.25 | High               |
| More entertainment facilities                                    | 2.37 | 0.76 | High               |
| Get support from expert from tea-tourism                         | 2.87 | 0.35 | High               |
| Highways to be built from airport and other destinations to hill | 3.00 | 0    | High               |

|   |      |      |      |
|---|------|------|------|
| country   |      |      |      |
| Introduce and upgrade railway transport system  | 3.00 | 0    | High |
| More government involvement for tea-tourism   | 2.80 | 0.41 | High |
| Stakeholder cooperation   | 3.00 | 0    | High |
| Introduce new tour package on tea-tourism   | 2.93 | 0.25 | High |
| Infrastructure and facility development   | 3.00 | 0    | High |
| Introduce “Ceylon tea Centres” couple with other related activities in the tourist destinations | 3.00 | 0    | High |

### 3.1.6 Plantation Sector Service Providers

In addition to the selected stakeholders in this Tourism sector, Plantation Sector Service Providers play a major role in tea-tourism sector. They act as main key players in the plantation sector. Though the market segment in this study is tea-tourism, Plantation Sector Service Providers have to play a big role for the development of tea-tourism.

Table 3.66 describes the type of services sector belongs to the tea industry. Table 3.68 shows that fifty three of the respondents from the plantation companies while representing forty from Tea Exporters, forty seven Tea Estate Owners, thirty three Tea Factory Owners, seventeen Tea Brokers and ten Tea Souvenir Producers.



**Table 3.66** Type of Services Belongs to the Tea Industry

| Type Service          | Number | (%) |
|-----------------------|--------|-----|
| Tea Exporter          | 12     | 40  |
| Tea Broker            | 5      | 17  |
| Plantation Company    | 16     | 53  |
| Tea Factory Owner     | 10     | 33  |
| Tea Estate Owner      | 14     | 47  |
| Tea Souvenir Producer | 3      | 10  |
| Sample Size: 30       |        |     |

### 3.1.6.1 Assessment on Economic Impact of Tea-tourism (Plantation Sector Service Providers' View)

Based on the experience of the respondents who are in the plantation sector Table 3.69 describes their perception on the economic impact of tea-tourism segment. According to the results reflected in the Table 3.67, the following characteristics rated by the respondents as “Strongly Agree” level: “There is substantial market for tea-tourism”, “Our tea plantations have a unique quality to attract tourists”, “We have many attractions to draw more tourists to tea-tourism”, “Tea-tourism is best segment to develop tea plantation areas”, “Tea-tourism is a new market for us”, “Formulation of government policy on Tea-tourism can highly impact on the development of tea-tourism”, “We can promote Sri Lanka as a tea-tourism destination in the tourism sector”, “International promotion on tea help to promote tea-tourism in Sri Lanka”, “International and local marketing campaign is needed to develop tea-tourism.”

The following characteristics were rated by visitors as “Not Sure” as per their perception on tea-tourism: “Marketing and promotion campaigns doing by Sri Lanka is satisfactory to attract more tourists to tea-tourism sector”, “Tea plantation sector has no awareness on tea-tourism”. Since “Tea-tourism is

not developed in Sri Lanka” rated by above respondents as “Disagree” level, this reflects that tea-tourism is not developed in Sri Lanka at present.

**Table 3.67** Assessment on Economic Impact of Tea-tourism (Tourism Service Providers’ View)

| <b>Key Factors</b>  | <b>Mean</b> | <b>S.D.</b> | <b>Level of Agreement</b> |
|---|-------------|-------------|---------------------------|
| There is substantial market for tea-tourism   | 4.80        | 0.41        | Strongly Agree            |
| Our tea plantations have a unique quality to attract tourists   | 5.00        | 0.0         | Strongly Agree            |
| Marketing and promotion campaigns doing by Sri Lanka is satisfactory to attract more tourists to tea-tourism sector | 2.87        | 0.82        | Not Sure                  |
| We have many attractions to draw more tourists to tea-tourism   | 4.77        | 0.43        | Strongly Agree            |
| Tea-tourism is best segment to develop tea plantation areas   | 4.40        | 0.81        | Strongly Agree            |
| Tea-tourism is not developed in Sri Lanka   | 2.43        | 1.01        | Disagree                  |
| Tea plantation sector has no awareness on tea-tourism   | 3.30        | 0.92        | Not Sure                  |
| Tea-tourism is a new market for us  | 4.87        | 0.35        | Strongly Agree            |
| Formulation of government policy on tea-tourism can highly impact on the development of tea-tourism                 | 4.50        | 0.68        | Strongly Agree            |
| We can promote Sri Lanka as a tea-tourism destination   | 4.83        | 0.38        | Strongly Agree            |
| International promotion on tea help to promote tea-tourism in Sri   | 4.13        | 0.51        | Strongly Agree            |

|   |      |      |                |
|---|------|------|----------------|
| Lanka   |      |      |                |
| International and local marketing campaign is needed to develop tea-tourism | 4.60 | 0.50 | Strongly Agree |

### 3.1.6.2 Market Potential for Tea-tourism (Tourism Service Providers' View)

The Table 3.68 illustrated the degree of potentiality currently exists for tea-tourism in Sri Lanka. As per the table 80% of the responded commented that there is “Very High” potential exists for tea-tourism sector while commenting “Average” by 20%.

**Table 3.68** Market Potential for Tea-tourism (Plantation Sector Service Providers' View)

| Market Potential | Number    | (%)        |
|------------------|-----------|------------|
| Very High        | 24        | 80         |
| Average          | 6         | 20         |
| Very Low         | -         | -          |
| Nil              | -         | -          |
| <b>Total</b>     | <b>30</b> | <b>100</b> |

### 3.1.6.3 Assessment of the Existing Services Available in Tea-tourism

Service is one of the key factors affected to satisfy the visitors during their stay. Therefore, Table 3.69 describes the perception of the Tourism Service Providers' on the existing service available for tea-tourism. As per the Table 3.69, study describes the assessment of the existing services available in tea-tourism sector. The following characteristics were rated by respondents as “Good” as per their perception related to tea-

tourism:” Security and Safety”, “Spa Service”, “Attractive Tour Packages” and “Electricity” and balance were rated as “Satisfactory level”.

**Table 3.69** Assessment of the Existing Service Available in Tea-tourism

| <b>Key Factors</b>          | <b>Mean</b> | <b>S.D.</b> | <b>Level of Satisfaction</b> |
|-----------------------------|-------------|-------------|------------------------------|
| Accommodation/lodging       | 4.33        | 0.76        | Satisfactory                 |
| Infrastructure              | 3.93        | 0.87        | Satisfactory                 |
| Water Supply and Sanitation | 4.07        | 0.78        | Satisfactory                 |
| Restaurants                 | 3.80        | 0.76        | Satisfactory                 |
| Transportation              | 3.77        | 0.94        | Satisfactory                 |
| Security and Safety         | 4.83        | 0.83        | Good                         |
| Tourist Shops               | 3.90        | 0.92        | Satisfactory                 |
| Souvenirs                   | 2.87        | 0.97        | Unsatisfactory               |
| Tourist Information Centres | 3.37        | 0.67        | Satisfactory                 |
| Tourist Police Posts        | 3.13        | 1.17        | Unsatisfactory               |
| Tourist Guides              | 4.00        | 0.87        | Satisfactory                 |
| Range of Foods              | 3.07        | 1.64        | Unsatisfactory               |
| Entertainment               | 3.80        | 1.03        | Satisfactory                 |
| Spa Services                | 4.37        | 1.33        | Good                         |
| Attractive Tour Packages    | 4.50        | 0.68        | Good                         |
| Electricity                 | 4.67        | 0.48        | Good                         |

#### **3.1.6.4 Assessment of the Degree of Priority for Improvement of Tea-tourism**

Table 3.70 describes the degree of priority for improvement of Tea-tourism as per the Likert scale. As per the Table 3.70 respondents were commented that the all level of important for all factors as “High” level important except “Construction of luxury hotels” as rate “Medium” level important.

**Table 3.70** Assessment of the Degree of Priority for Improvement of Tea-tourism

| <b>Key Factors</b>  | <b>Mean</b> | <b>S.D.</b> | <b>Level of Agreement</b> |
|---|-------------|-------------|---------------------------|
| Required marketing and promotion in abroad  | 3.00        | 0           | High                      |
| Construction of luxury hotels   | 2.19        | 0.81        | Medium                    |
| Introduce home stays in the tea plantations or suborn area                                      | 2.46        | 0.74        | High                      |
| Introduce Agro Parks or Theme Parks   | 2.64        | 0.49        | High                      |
| Create more activities on tea-tourism   | 3.00        | 0           | High                      |
| More entertainment facilities   | 2.80        | 0.41        | High                      |
| Get support from expert from tea-tourism  | 2.80        | 0.41        | High                      |
| Highways to be built from airport and other destinations to hill country                        | 2.87        | 0.35        | High                      |
| Introduce and upgrade railway transport system  | 3.00        | 0           | High                      |
| More government involvement for tea-tourism   | 2.87        | 0.35        | High                      |
| Stakeholder cooperation   | 3.00        | 0           | High                      |
| Introduce new tour package on tea-tourism   | 2.83        | 0.38        | High                      |
| Infrastructure and facility development   | 3.00        | 0           | High                      |
| Introduce “Ceylon tea Centres” couple with other related activities in the tourist destinations | 2.73        | 0.45        | High                      |

## **CHAPTER 4**

### **SUMMARY**

The aim of this chapter is to conclude, examine the study findings, and make recommendations to the respective stakeholders in the tea-tourism sector and state limitations encountered in this research. This chapter broadly discussed drawing attention to the findings of main stakeholders in tea-tourism employed for the study of the first four objectives under this study. The identifying of existing facilities, services and other products and find out necessary value added products which the sector could offer for the visitors in tea-tourism development in the country is also examined in this chapter. The market potential, existing problems, main challenges in tea-tourism development will be investigated while discussing feasible solutions for the said problems in future. Since the tea and tourism sectors plays in isolation, this study discussed necessary factors which needs to incorporate both sectors. This chapter describes the ways how community can benefited from tea-tourism development in the country in sustainable development. Finally, recommendations are made to meet above challenges in the tea-tourism sector as a sub sector of the tourism industry which in turn needs to assist for the sustainable development in the country. In addition to that, areas and more studies which supporting and enhancing tea-tourism sector are identified.

## 4.1 Conclusions

### 4.1.1 International Visitors

The majority of the visitor travelled to Sri Lanka has at least a bachelor's degree followed by having a Diploma. The occupational category shows that nearly one-third (1/3) of the visitors travelled to Sri Lanka were Professional workers as their employment. And also it was noted that majority of the visitors travelled to Sri Lanka represent under the income category between US\$ 1,000-US\$ 3,000. In other words, more than four-fifth (4/5) of the visitors travelled to Sri Lanka earn at least US\$ 1,000 per month as their income status. The study revealed that, more than half of the visitors stayed between 6-10 nights during their stay while recorded 9.57 as average duration of stay in Sri Lanka and more than one-third of them were repeat visitors. Study indicated that, more than one-third of visitors were travelled with their spouse to Sri Lanka.

With regards to the visitor preferences and activities and their expenditures, table 3.5 describes that a more than five-fourth of the visitors indicated their main purpose of visit as Holiday or Vacation or Leisure and this is very realistic according to the SLTDA's Annual Statistical Report of 2007. And also this describes that the special interests under the main three components i.e. Seeing, Being and Doing of the visitors travelled as a holiday/vacation/leisure as their main purpose of visit to Sri Lanka. A major proportion of respondents travelled under the holiday/vacation/leisure shows that their special interest under this category to visit Sri Lanka for Nature & Sceneries followed by Sun & Beaches, Culture & Heritage, Shopping and Wildlife Safaris.

Among the places visited by tourists, Colombo was ranked as number one while Kandy, beaches in the South of Sri Lanka, Elephant Orphanage in Pinnawala, Sigiriya/Dambulla and Nuwara Eliya were recorded as second, third, fourth and fifth highest interested places rated by the visitors respectively.

From the visitors visited to tea plantation areas by respective country of residence, the visitors from Netherlands (86%) showed that highest, followed by 75% by Japan, 74% by Australia, 71% by Switzerland, 70% by Scandinavian countries, 67% by Italy and 60% by Canada.

In terms of visiting tea plantations, 83.7% of the tourists who visited to see tea plantation areas are visited to tea plantations in Nuwara Eliya followed by 23% in Kandy and 4.4% in Bandarawela. This was resulted that Nuwara Eliya and Kandy has more popular among international visitors than other areas where tea plantations are exists in Sri Lanka.

In terms of the visitors' satisfaction levels on the activities they performed during their visiting to tea plantations, "Visiting sightseeing", "Visiting tea factories" and "Tasting Ceylon Tea" were rated at "Most Interested" level. The activities of "Exploring & Learning", "Visiting to see tea plucking & tea processing", "Trekking tea plantations", "Exploring rural life style" and "Visiting tea shops were rated at "More Interested" while activities " Visiting to souvenir shops" and "Cycling" were rated as "Interested" and "Less Interested" level respectively. Hence, above results reflects the high satisfaction level of tourists from the activities done during their staying in tea plantations except cycling.

In terms of accommodation used by the visitors during their staying in the plantation areas in Sri Lanka shows that, 79.5% of visitors stayed at hotels while 7.7% at private accommodation places, 6.8% at Tea Plantation Bungalows and 6.0% at Guest Houses. Therefore, this evident that most of the international visitors visiting tea plantation areas used hotels as an accommodation during their stay.



Furthermore, study shows that international visitors have a very good perception having with high level of satisfaction about the resources, tourism attractions, and services available in tea plantation areas except accessibility to tea plantation areas and existing road system within the particular areas.

With regards to the awareness on “Ceylon Tea”, male respondents had highest positive thinking on “Taste of Ceylon Tea is extremely good” while having a statistically significant difference between male and female respondents. Furthermore, factors, “Safe as a travel destination”, “Has a high degree of accessibility by roads”, “I am happy with the activities done in the tea plantations”, “I am happy with the tour package to tea plantations”, “Tour package included every thing in tea plantations”, “Guides/Interpreters have a good knowledge”, happy with the cleanliness of plantation areas and happy with the services in the tea plantations indicated that statistically significant difference between the male and female at 95% confidence level and at 5% error. All nine factors mentioned above reflected that male having more agreeable value than female respondents.

The variables, “Sri Lanka has many nature attractions/places”, “Good place as a honeymoon destination”, “Climatic conditions in hill country is unique”, “I am happy with the environment in tea plantations”, “I am happy with the activities done in the tea plantations”, “I am happy with the tour package to tea plantations”, “Tour package included every thing in tea plantations”, “Happy with the services of the hotel staff”, “Many agro products are available in tea plant. Area”, “Happy with the road system to hill country” and “Enough information in hill country areas” indicated statistically significant difference among the age groups.

And also the variables, “Safe as a travel destination”, “Has a high degree of accessibility by roads”, “Good place to take children”, “Good place as a honeymoon destination”, “Hill country has unique natural sceneries”, “Climatic conditions in hill country is unique”, “I am happy with the environment in tea plantations” and “Happy with the road system to hill country” indicated statistically significant difference among the monthly income of the respondents.

This study indicated that nearly 75% of the visitors have been awareness on Sri Lanka tea plantations before visiting to Sri Lanka and in other words every three visitors from four visiting to Sri Lanka know about Sri Lanka tea plantation prior to their visit to Sri Lanka.

From the above, Newspapers & Magazines, Internet, Friends, TV and Travel Operators of respondents’ were highly influenced visitors to get awareness about “Tea Plantations” in Sri Lanka.

In terms of awareness on “Ceylon Tea”, this study found that majority of the respondents (88.1%) who have heard about “Ceylon Tea” before visit Sri Lanka and from that “Black Tea” and “Green Tea” they were highly awareness. Apart from, visitors were commented that “Ceylon tea has a unique taste” and “Ceylon tea has a strong taste” “Strongly Agree” and “Agree” levels respectively.

With regards to the awareness on “Ceylon Tea”, Newspapers & Magazines, Friends & Relatives, Internet were highly influenced visitors to get awareness on “Ceylon Tea”. In addition to that, research found that there are nearly one-third of the visitors travelled to Sri Lanka have visited agro-tourism sites during their previous visits. With regards to the visitors’ overall holiday experience in Sri Lanka were commented as they enjoyed during their stay in Sri Lanka (99.9%).

The attributes, “Price/affordability” and “Safety & Security” were rated as “Most Important” attributes by the visitors when they selecting a destination for travel and less important for “Natural disasters”.

In the scenario of the development of agro-tourism and tea-tourism, study found that agro-tourism and tea-tourism has been developed at 18.1% and at 27.5% respectively as per the international visitors’ opinions.

Finally, study concise the recommendations and suggestions given by visitors for the development of agro-tourism and tea-tourism as mentioned bellow.

In terms of agro-tourism development, product development (e.g. infrastructure, promotional materials, new tour itineraries, tour packages, marketing strategies, etc.), government involvement (e.g. government priority, leadership, policy formulation), future investments (e.g. invite foreign and local investors for investments), more awareness (e.g. awareness the travel and tea trade, community, government sector) and more promotions (e.g. publicity, advertizing, etc.) were recommended by the visitors.

#### **4.1.2 Local Community**

In terms of the local community, study indicated that nearly half of the responders have been obtained their education between grade 5-10 (48.7%) while having educational up to grade 5 (47.4%), 2% had G.C.E (O/L) qualification and 2% were not obtained any education. This evident that most of the head of the household members belongs to the tea plantation areas were obtained only their primary education. And also this describes that, nearly four-third (3/4) of the household members are living this areas from their birth while 10.7% were living since more than 15 years.

With regards to the level of the income of the local community is one of the good indicators to assess their current living standards. According to the study, majority of the household members earn between SLRS. 5,001 to 6,000 (26.7%) (approx. US\$ 46 to US\$ 55) while earning between SLRS. 2,001 to 3,000 (24%) (approx. US\$ 19 to US\$ 28) per month. Study found that, from the respondents, 14.6% were within the income category SLRS. 4,001 to 5,000 (approx. US\$ 38 to US\$ 46) and 14% earn by and monthly income between SLRS. 3,001 to 4,000 (approx. US\$ 28 to US\$ 37) earn by 14% of respondents. In other words, this found that there are 16% of the household members earn more than SLRS. 6,000 (approx. more than US\$ 55) per month. Apart from this, study found that 14% of the household members have a secondary income.

Community awareness on agro-tourism indicates that 63.3% of the household members do not know what agro-tourism is while 28% of them have some knowledge of agro-tourism and 8.7% have an awareness of agro-tourism.

In terms of level of awareness, the study found that the factors “I like if more tourists visiting to see tea plantations” and “I like to know/learn about tea-tourism” having greater satisfaction level at “Most Interested” level while having the satisfaction level at “Interested” level for other factors. This evident that all community given their interests to the future tea-tourism development in their areas. Furthermore, study found that there is a statistically significant difference between male and female respondents at 95% confidence level and at 5% error for the factor, “I like to know/learn about tea-tourism” and statistically significant difference among the age groups for the factor “I like if more tourists visiting to see tea plantations” at the same significant level.

With regards to the social and cultural aspects of tea-tourism, study found that level of satisfaction of local community is higher for the factors “Social life get benefits from tea-tourism” and “Tourists can see way of life of the

people in the tea plantations” and also they believe that “Tourism creates social problems like Criminality, alcoholism and drugs” since it has a Mean value at “Agree” level. It is noteworthy that “Exposure to other cultures and languages”, “Visiting of too many visitors damage rural life style of the community” and “People are motivated to learn English through tourism development in this area” were rated at “Not Sure” level by households.

Environmental aspects with regards to tea-tourism, study shows that community highly believed the tea-tourism creates natural greenery and it help to protect natural environment with a high satisfaction level and also believe that this will improve the roads and other facilities in their tea plantation areas.

Furthermore study indicated that there is an excellent potential for tea-tourism and they are very happy to see such a tea-tourism development in their areas in future as per the comments made by local community. Though there is a high development in tea-tourism in their areas, local community highly believes that “Big companies get most tourism benefits and creates fewer benefits for them”. Moreover, the study revealed that community believes there will be a good impact to their life style and also to the economy through tea-tourism as generator of community redevelopment in their areas. Though there is a good sign for tea-tourism, local community has a doubt about, it creates more business opportunities for local community, reduce reverse migration of labor, creates more income to the people and hence these were rated by local community as “Not Sure”. Other noteworthy feature that, the local people, living in this area believes, terrorism will not threat to the tea-tourism development in Sri Lanka.

Finally, the local community recommends that there should be a more promotion in abroad, highways from airport to hill country, upgrading of railway system, construction of luxury hotels, more government involvement, stakeholder cooperation

and infrastructure and facility development to develop tea-tourism in future mainly under the product development, stakeholder cooperation and promotions.

### **4.1.3 Tourism Resource Based Managing Organizations in the Public Sector (TRBMO)**

#### **Organization's View of Promoting Tea-tourism:**

As per the opinions given by the respective TRBMOs the study found that contribution to tea-tourism is very less from the above organizations since it is new niche market segment to Sri Lanka and it is resulted to come up the necessary prioritization from the government to this study area. In terms of promoting tea-tourism, respondent organizations indicated that to identified potential market segments and product development to generate more tourists to the country through research. And also some organizations commented that to have some changes of the policy formulation in the related field since this is new segment to Sri Lanka. Furthermore, study noted that government and relevant stakeholders should be use the brand name of "Ceylon Tea" since it is very popular in the world as a best brand while suggesting bringing tea conventions, tea related workshops to the country as a promotional tool by focusing MICE market segment. Many organizations suggested that all tourism and tea related organizations such as stakeholders incorporate together, working closely through better understanding since at present such better cooperation and coordination not to be seeing.

### **Problems have to face by the Organizations When Developing Tea-tourism in Sri Lanka**

This study was identified following seven broader problem areas when developing tea-tourism in the country: Lack of co-ordination and understanding between stakeholders; policy formulation and implementation with regards to the tea-tourism; incorporate tea-tourism into overall tourism strategy; product development; financial support; infrastructure development and instability of the country.

### **Factors Necessary to Incorporate Tea-tourism into the Overall Tourism Strategy**

Study highlighted that to incorporate both tea and tourism sectors together which has not incorporated yet for the further development of tea-tourism. As a result study identified joint promotions, product development, awareness programmes and policy formulation to the incorporate tea and tourism into the overall strategy.

### **Proposed Organizations to Work Together in Tea-tourism**

There are five organizations: MOT, STDA, Sri Lanka Tea Board, MOP and private sector (Travel & Tourism industry) were identified by the respondents as top priority (100%) organizations should work together while Plantation companies, PRC's, PA, TSHDA and CBO's were proposed by the respondents to work very close together in addition to the above stakeholders in tea-tourism development in Sri Lanka.

## **Role of Tourism Related Government Resource Based Managing Organizations in Cooperation**

The findings from the study indicates that policy measures need to be implemented in the tea-tourism through close cooperation and consultation with the relevant stakeholders and also to ensure that a well focussed approach and a consensual view from the knowledge and experience of the stakeholders is adopted. There was also the necessity of creating more awareness programs and in communicating expertise related to the sector to the community at large and also to ensure that a proper coordination and networking is established within the stakeholders. The implementation of effective guidelines on sustainability issues in connection tea-tourism sector was a major factor that needs to be built upon.

Further, there was an overriding need to create incentive schemes for local and international investors to so that tourism business could be uplifted while implementing appropriate strategies to incorporate tea-tourism into the overall national tourism strategy.

### **Implications to Implement the Close Stakeholder Cooperation:**

#### **Strategic Actions:**

In order to ensure closer stakeholder cooperation, the findings support strategic actions towards developing a clear path and an action plan towards how tea-tourism should be developed while incorporating an effective monitoring system. The need for a strategic working committee to represent each stakeholder was felt necessary and thereby developing knowledge database for



future development needs. The findings also support the need for the government to consider tea-tourism as a priority industry and accordingly adopt appropriate policy measures for the industry. It was also felt that respective government bodies related to tea-tourism should effectively promote “Ceylon Tea” as a brand as this has a positive impact towards giving impetus to tea-tourism in Sri Lanka.

### **Mutual Understanding**

The study affirmed the need for the respective tourism related resource managing organizations to render support to other non government stakeholders including local community when they expect the support from the related organizations while supporting the industry through international promotions to promote tea tourism in Sri Lanka.

### **Awareness Programmes**

The findings from the study indicate that the necessity of conducting awareness programmes by focusing the stakeholders and local community on the significance of the tourism business.

### **Challenges that the Government Sees in Promoting Tea-tourism**

The findings from the study indicates that linking of tea and tourism which relates to tea-tourism felt as a immense challenge as well as the no proper commitment from all stakeholders which relates to tea-tourism. Lack of investment opportunities and insufficient infrastructure especially road

system in the hill country were identified as a major challenges to the future tea-tourism development.

### **New Potential Areas that Can Develop Tea-tourism**

Further, study identified two geographical areas having high potential divisions which could promote tea-tourism in hill country and low country i.e. Hill country: Bogawantalawa, Maskeliya, Udapussellawa, Haputale, Hatton, Bandarawela, Talawakele and Nuwaraeliya and Low country: Deniyaya, Morawaka and Hiniduma.

### **Value Added Methods for the Product Development of Tea-tourism**

In order to ensure to value added methods for the product development of tea-tourism, the findings support to introduce value additions by developing activities based on tea e.g. events, awareness programs and creating special interests to the visitors on tea-tourism. Furthermore, study indicated that creating variety of promotions, developing products e.g. quality and standards, infrastructure and souvenirs will highly impact to develop the value addition to the tea-tourism.

### **What Developments Necessary to Promote Tea-tourism as a Special Market Segment?**

The study affirmed the necessity for the infrastructure development to promote tea-tourism as a special market segment while developing the related products and uplifting the living standards, health, welfare and education of the tea plantation community. Further, there was an overriding need to create incentive schemes for tea and tourism industry to

train respective skill areas which relates to tea-tourism while strengthen the stakeholder cooperation in tea-tourism.

Moreover, the study indicated that, there is a necessity of creating more awareness programs and in communicating expertise related to the sector to the community, plantation companies and also to the travel and tourism industry at large and also to ensure that an identification of the market segments which could help to conduct appropriate promotional campaigns by focusing above markets. Finally, this indicated that to ensure to organize international tea conventions, tea forums and exhibitions to focus international tea trade while creating the government leadership and necessary priority for tea-tourism.

### **How the Government Plans to Develop Tea-tourism to benefit the Local Communities?**

The findings from the study indicated that the government has to give high priority to the tea plantation community on the following areas:

In order to ensure to provide benefits to the local community for the development of tea-tourism, the findings support to uplift their wealth, water supply, sanitation facilities and increasing their wedges by the government while creating an opportunities to the local people and also to the plantation companies to enter into tourism business by giving proper awareness and training through mobilizing them. Further, there was an overriding need to create initiatives to increase the productivity of tea industry hence it will increase the wealth of local communities while providing loan schemes with low interest to the local people to start small level business on tea-tourism.

### **Mechanism Suggested to Provide Maximum benefits to the Local Community in Developing Tea-tourism**

The study affirmed that there was a necessity for institutions to provide training to middle management in the plantation, travel and tourism sectors and local community and thereby creating additional income opportunities through establishment of small & medium enterprises. The introduction of modern technology in the tea industry through which the quality of the tea production could be increased and thereby enhancing the export of tea which would in turn increase foreign exchange earnings and thereby benefit the local communities.

The development of agro-tourism including tea-tourism and other attributes like sight seeing & other tourism products would create more job opportunities and enhance rural income and improve the over all quality of lives for the local population. At the same time income would be generated through sale of local products such as vegetable and dairy products, local handicrafts, show casing their tradition and culture which would provide an experience for the tourist and benefit the locals also at the hotels accommodating the tourist.

The quality of the social facilities such as clean drinking water, access to schools, hospitals and training opportunities should be available to the community to have a better quality of life. NGO's support could be sought to support social welfare schemes which directly impact of the poorer sections of the society. A social welfare schemes to be introduced by the tea industry by allocating percentage of their profits for the development and betterment of the local community in the tea industry.

That local community should be directly engaged in the sales outlet and such opportunities like training local entrepreneur, local guides, training on hospitality & product standards & language etc. would enable providing livelihood opportunities.

### **Government and Private Sector Partnership Proposed to Develop Tea-tourism**

The findings from the study indicates that necessity of jointly work together for the necessary development of tea-tourism by focusing common goal by tea and travel and tourism stakeholders while providing necessary leadership to the respective stakeholders to achieve the expected goals. In order to ensure the government and private sector partnership, the findings support strategic actions towards developing a clear path and an action plan towards how tea-tourism should be developed while implementing an effective continuous monitoring system. In this process the need for a respective government authority to involved to form a Task Force to implementation and monitoring of the tea-tourism development in the country while educate and consult respective stakeholders when policy formulations for the development of tea-tourism. The findings also support the need for the proper brand, marketing, promotional strategies to be jointly worked with all stakeholders together to promote the destination in abroad.

## **SWOT Analysis**

In order to determine the market characteristics of tea-tourism, the study found the respective SWOT analysis of the above market as follows.

The world largest tea exporter, world second largest tea producer, more than 140 years old colonial culture, wide spread beautiful tea gardens in the country were identified in terms of the strength to develop tea-tourism. The lack of co-ordination among stakeholders especially between responsible organizations for promoting tea and tourism, lack new innovative ideas, no proper marketing and product development strategy in tea-tourism, no awareness on tea-tourism in tea and tourism industry on tea-tourism especially in local community and lack of financial support we indentified by this study as a weaknesses with regards to develop tea-tourism. Moreover, minimum competition in tea-tourism market segment in the world, diversified tea into many geographical areas, beautiful tea landscapes, unique climatic condition and availability of many tourism attractions placed in tea plantation areas highlighted by this study as opportunities that the Sri Lanka has in terms of tea-tourism. Finally, terrorist activities in the country, changing of climatic condition in tea plantation areas, lack of financial support to start new income generation opportunities for local community especially in the tea plantation areas, less relationship between tea plantation community and plantation companies, no government priority for tea-tourism development, infrastructure problems, lack of tea tourism events to attract tourists to the country and lack of co-ordination between respective authorities in tea, travel and tourism sector were highlighted by this study as main barriers, problems and resistant factors which will affects to tea-tourism development in the country.

### **Suggestions to Overcome Barriers and Problems Affects to the Tea-tourism Development**

In order to overcome the barriers and problems affects to tea-tourism development, the findings support strategic actions towards developing a clear path and a strategic plan with specific initiatives must be drawn up involving all stakeholders in the tea-tourism while creating close coordination with all stakeholders in the sector. As an initiative, study found from the respondents that there is a necessity to form a Task Force to monitor and implement the action plan representing representatives of all stakeholders while creating specific marketing and promotional strategies for short, medium and long term by initiating higher priority to this new segment. There was also the necessity of investigate the best practices from other similar countries those who are doing tea-tourism while educating all government and private partners on new emerging concept & its benefits to overcome the barriers and problems mentioned above. Furthermore study indicated that to identify key tour operators who are willing to promote their tour packages and sell their products in overseas as an alternative to overcome above barriers and problems. It was also felt that to launch joint advertising campaign overseas as well as locally by focusing tea-tourism while introducing annual events e.g. Tea Festivals, Annual International Tea Symposiums with participation of key celebrities, etc. The study indicated that relevant government agencies should take the leadership to overcome above barriers and problems through above mechanisms. Finally, though the above barriers and resistant factors solved all efforts depend on the security situation of the country. Therefore, by looking these governments make the fullest effort to stop the terrorism within the country in terms of the development in the country including tea-tourism.

#### **4.1.4 Researchers and Scholars**

The tea industry in Sri Lanka has a history of over 140 years and this is manifested in the fact that the country is now the largest tea exporter in the world. The general conclusions that have been drawn from the findings indicate that Sri Lanka has immense knowledge and experience in the field of industry and that product diversification and innovation in its related field was felt most essential.

The Researchers and Scholars view indicated that the current international market for tea-tourism was “Excellent” at 27% and “Good” at 30% and at 43% as “No idea” as it was a new market segment. This finding suggests that there is ample provision of improving on the strengths of tea-tourism as a market potential. Marketing and Promotional campaigns features as the most important factors to tourism development considering the fact that scholars view that tea-tourism “is developing” at 47% and “not developed” at 43%.

Hence in order to develop the marketing and promotion efforts, it is concluded that a concerted effort of all stakeholders through an action oriented plan with the government supporting the initiative must be implemented. This should be complimented by government measures of financial assistance to the sector to develop a comprehensive marketing and promotion plan and programs with the SLTDA and Sri Lanka Tea Board with proper market segments to focus on.

Potential areas for development were identified on two geographical areas: Up country and low country to promote tea tourism as a pilot project in view of its tea and tourism prospects. The scholars view that



the existing tourism products was sufficient to attract tourists to the identified areas for tea-tourism. It was however recommended to upgrade of existing infrastructure and other tourism related products such as roads, quality restaurants, standard hotels and to identify new tourism products: entertainments facilities, tea shops, domestic air planes, home stays, theme parks, tea night, tea festivals, serve tea as a welcome drink, awareness the tourists on by focusing health aspects of tea, souvenirs made from tea commodities and create tea culture in the hotels etc.

In order to develop tea-tourism, it is concluded that to pay more attention to create a stakeholder cooperation and product development, marketing and promotional aspects than other areas of improvements.

The Researchers and Scholars view indicated that the activities, facilities and services can play a major role to positioning Sri Lanka as a tea-tourism destination. It was however identified to create activities such as tea festivals, designate “Brand Ambassador” for the tea industry, organize FAM tours to leading international film producers, film stars and journalists, annual tea competitions, awareness of health aspects of tea, more promotions through Srilankan Cricket Team in the cricket and tea loving countries, invite international MICE organizers to Sri Lanka, etc.

With regards to the development of facilities, it was identified that to establish facilities such as “Theme Parks” in tea plantation areas, offering tea as a welcome drink at hotels and other related places, tea centres, tea shops and restaurants with entertainment facilities (Musical Band, Snooker, etc.), shopping malls, quality hotel and restaurants, etc.

In view of the Researchers and Scholars' suggestions on "Services", it was identified that to establish services such as souvenir shops, internet cafes, transport providers, tourist information centres, tour guides, domestic air transportations, upgrading of railway system etc.

### **Initiatives Suggested by Researchers and Scholars to Get the Involvement of the Local Community to the Product Development Process**

The Scholars view indicated that to awareness the local community on tourism business by the respective government and private sector authorities while providing incentives to local community to involve in the small and medium enterprises on tourism through necessary skill development training on product development. In order to provider above training and services, scholars suggested to form a Satellite Schools or similar body in the plantation areas to involve them to tourism development process hence this will impact to increase the wealth of the people in the plantation area.

### **Partnership between Public and Private Sector Partnership in Tourism and Tea-tourism**

In view of Researchers ad Scholars, study indicated that 74% of the respondents had an impression on above two sectors having positive partnership in tourism business. It was indicated for the tea-tourism business that 40% of the responded had an impression on above two sectors having positive partnership.

### **Proposed Organizations to Work together in Tea-tourism**

There are five organizations: MOT, SLTDA, Sri Lanka Tea Board, MOP and private sector (Travel & Tourism industry) identified by the respondents as top priority (100%) organizations should work together while Plantation companies, PRC's, PA, TSHDA and CBO's were proposed by the respondents to work very close together in addition to the above stakeholders in tea-tourism development in Sri Lanka.

### **Proposed Organizations to Work together in Tea-tourism (Researchers & Scholars' View)**

There are five organizations: MOT, STDA, Sri Lanka Tea Board, MOP and private sector (Travel & Tourism industry) were identified by the respondents as top priority (100%) organizations should work together while PRC's, PA, TSHDA and CBO's were proposed by the respondents to work very close together in addition to the above stakeholders in tea-tourism development in Sri Lanka.

### **Expected Roles to Play by MOT and SLTDA for the Tea-tourism Development**

The findings from the study indicate that "Marketing & Promotions" need to be the first priority as a role to play by MOT and SLTDA for the tea-tourism development while plays as a "Policy Formulator" and "Be a Facilitator" be the second priority followed by "Planning" and "Be a Coordinator" be the third and fourth priority respectively.

### **Expected Roles to Play by Sri Lanka Tea Board, TSHDA, MPI and DOA for the Tea-tourism Development**

In terms of the roles to play by the government authorities related to tea industry such as Sri Lanka Tea Board, TSHDA, MPI and DOA were indicated by this study and “Be a Policy Formulator”, “Marketing & Promotions” and “Be a Facilitator” were ranked as first, second and third respectively while plays as “Be a Coordinator”, “Development and Implementation” and “Planning” were ranked as a fourth priority for the tea-tourism development.

### **Expected Roles to Play by Private Sector Stakeholders i.e. Tourism and Hospitality Industry, Tea Plantation Industry and Other Stakeholders in Tea-tourism Development**

There are five broader areas were indicated by the researchers and scholars in terms of the roles to play by the private sector stakeholders to the tea-tourism development and most of them suggested more than one role which to be undertake by private sector stakeholders. Further, study indicated that it is necessity to jointly work together for the necessary development through active participation by all stakeholders as a first priority followed by “These stakeholders should be closely working together with the government tourism authorities” as a second priority. In addition to the above, scholars were commented that above stakeholders should “Maintain the quality of the product and services in the product

development”, “Contribute to protect the resources and environment belongs to the sector” and “Joint marketing & promotions” as a second, third and fourth priorities in tea-tourism.

### **Expected Roles to Play by Local Community in the Plantation Sector, Community Based Organizations (CBO’s), NGO’s and Unions of the Tea Plantation Sector in Tea-tourism development**

Local community is the one of the major stakeholder category in the sustainable tea-tourism development in the country being directly involved especially in the tea industry while offering maximum benefits to the community. In terms of the roles to play by the local community, study indicated that it is necessity to “Jointly work together with the travel & tourism companies” as a first priority followed by “Contribute to protect the resources and environment in tea-tourism”, “Work join hand with tea plantation companies”, “Working closely together with provincial level or government tea & tourism authorities” as a second, third and fourth priority for the tea-tourism development.

### **Factors Necessary to Incorporate Tea-tourism into the Overall Tourism Strategy-Researchers and Scholars’ View**

In order to ensure that to incorporate tea-tourism into the overall tourism strategy, this research found that joint promotions & marketing, product development and awareness programmes can do a greater

impact to the future development of tea-tourism through better cooperation. There was also the necessity of creating more awareness programs and in communicating expertise related to the sector to the community at large and also to ensure that a proper coordination and networking is established within the stakeholders. The implementation of effective guidelines on sustainability issues in connection tea-tourism sector was a major factor that needs to be built upon.

Further, there was an overriding need to create incentive schemes for local and international investors to so that tourism business could be uplifted while implementing appropriate strategies to incorporate tea-tourism into the overall national tourism strategy.

#### **4.1.5 Tourism Service Providers**

In terms of awareness, study found that there are seven out of ten respondents were awareness on agro-tourism while awareness six out ten on tea-tourism from the above stakeholder category. This reflected that majority of the respondents in this category awareness on what agro-tourism and tea-tourism is.

When considering perception of the key factors on the economic impact of tea-tourism, majority of the respondents were strongly agreed that we have a substantial market for tea-tourism to attract tourists through quality and uniqueness tea plantations. And also the respondents were strongly agreed that we have many attractions to draw more tourists to tea-tourism and can promote Sri Lanka as a tea-tourism destination through international tourism promotions combining with proper marketing campaigns. Further more, study revealed that tea plantation sector has no awareness on tea-tourism but identified it as a best segment to develop tea plantation areas. And also study identified that formulation of government policies on tea-

tourism could highly impact on the development of this sector though it is not developed yet, since it is new market to Sri Lanka. But this study identified that marketing and promotion campaigns doing by respective authorities in Sri Lanka is not satisfactory to attract more tourists to tea-tourism sector.

In terms of market potential for tea-tourism the study found that, half of the respondents were agreed that there is a potential exists for tea-tourism and 43.3% commented that there is a high potential exists for tea-tourism. In other words, this study concludes that there is a huge potential for tea-tourism in the country.

### **Assessment of Product Development in Tea-tourism**

In terms of product development in tea-tourism, the study found that respondents were highly agreed to develop the respective tourism products before promote tea-tourism while developing existing tour packages with new tour packages. And also study revealed that quality of the accommodation in tea plantation areas are suitable for cater to tourists under tea-tourism as agreed by the respondents.

### **Assessment of the Existing Services Available in Tea-tourism**

In order to find out the satisfaction levels of the existing services available in tea-tourism sector, the study found that the key factors; Tourism Information Centres, Entertainments and Tourist Police Posts has a unsatisfactory level while other factors having good and satisfactory as a level of satisfaction.

## **Assessment the Degree of Priority for Improvement of Tea-tourism**

The findings from the study indicates that key factors such as required marketing and promotion in abroad, create more activities on tea-tourism, more entertainment facilities, get support from expert from tea-tourism, highways to be built from airport and other destinations to hill country, introduce and upgrade railway transport system, more government involvement for tea-tourism, stakeholder cooperation, introduce new tour package on tea-tourism, infrastructure and facility development and introduce “Ceylon Tea Centres” couple with other related activities in the tourist destinations have been identified as a high priority to improvement of tea-tourism while construction of luxury hotels, introduce home stays in the tea plantations or suborn area and introduce Agro Parks or Theme Parks with a medium priority for the improvement.

### **4.1.6 Plantation Sector Service Providers**

#### **Assessment on Economic Impact of Tea-tourism (Plantation Sector Service Providers’ View)**

The findings from the study indicates that key factors such as “Marketing and promotion campaigns doing by Sri Lanka is satisfactory to attract more tourists to tea-tourism sector” and “Tea plantation sector has no awareness on tea-tourism” as a level of satisfaction as “Not Sure” and factor “Tea-tourism is not developed in Sri Lanka” as indicated as “Disagree”. In other words the factors except “Not Sure” and “Disagree” were rated as “Strongly Agree”.

In terms of market potential for tea-tourism the study found that, 80% of the respondents commented that there is a high potential exists for tea-tourism sector while 20% having average potential.



The findings from the study indicates that key factors such as Souvenirs, Tourist Police Posts and Range of Foods were rated as “Unsatisfactory” while others having “Satisfactory” and “Good” at a “Satisfactory” level.

### **Assessment the Degree of Priority for Improvement of Tea-tourism**

The finding from the study indicates that except the key factor “Construction of luxury hotels” other factors were rated with a high level of satisfaction by the respondents in terms of priority for improvement of tea-tourism in Sri Lanka.

## **4.2 Discussions**

### **4.2.1 Objective 1: To Identify the Existing Facilities, Services and Other products and the Ways to Find Out Value Added Product and Services which the Sector can offer for the Visitors Through Tea-tourism**

The Study indicated that 33.5% of the visitors travelled to Sri Lanka tea plantations in hill country such as Nuwara Eliya, Bandarawela, Horton plains, Kandy, etc. where tea plantations are exists in hill country while 43.5% visited to Nuwara Eliya, Bandarawela and Horton Plains. In terms of the geographical locations, Kandy, Nuwara Eliya, Bandarawela and Horton Plains are representing the hill country in Sri Lanka. And also study revealed that majority of the visitors travelled to experience the tea plantations used hotels (79.5%), Private accommodation (7.7%), Tea Plantation Bungalows (6.8%) and Guest Houses (6%).

In terms of travel patterns of international visitors in the country as per the study, Kandy and Nuwara Eliya ranked as 2<sup>nd</sup> and 6<sup>th</sup> respectively. This indicated that there is a substantial amount of tourists travelling to these hill country areas. In addition to the above secondary sources, support on existing facilities, services and other products in tea-tourism in the country as shown in Table 4.1. Table 4.1 shows that the guest nights and the occupancy rates recorded by the tourists in the graded accommodation establishments in main tea plantation areas in the hill country such as Kandy, Nuwara Eliya, etc. As shown in the table, more guest nights were recorded in Kandy area (341,458) than other areas in the hill country and this is reflected by the annual occupancy rates with regard to these areas.

**Table 4.1** Statistics of the Hotels Registered Under SLTDA in Hill Country and Kandy in Sri Lanka

|                       | Hotels Registered in Sri Lanka | Hotel Registered |       |              |      |
|-----------------------|--------------------------------|------------------|-------|--------------|------|
|                       |                                | Kandy            | (%)   | Hill Country | (%)  |
| No. of Hotels         | 241                            | 21               | 8.71  | 20           | 8.30 |
| Total Guest Nights    | 3,940,386                      | 341,458          | 8.67  | 188,336      | 4.78 |
| Foreign Guest Nights  | 3,134,243                      | 246,095          | 7.85  | 131,696      | 4.20 |
| Local Guest Nights    | 806,143                        | 95,363           | 11.83 | 56,640       | 7.03 |
| Annual Occupancy Rate | 47.8                           | 44.0             |       | 39.90        |      |

**Source:** SLTDA, 2006

As per the responses given by the international visitors in connection with their satisfaction levels of the activities performed during their stay in tea plantation areas in Sri Lanka, such as “Visiting sightseeing”, “Visiting Tea Factories”, “Tasting Ceylon Tea”, “Exploring & Learning”, “Visiting to see tea plucking & tea processing”, “Trekking tea plantations”, “Exploring rural life style” and “Visiting tea shops” and “Visiting souvenir shops” in order to get a satisfactory experience from tea-tourism and were more satisfied with the above attributes.

And also study concluded that, most of the visitors travelled to tea plantation areas were happy with the accommodation facilities in hill country, services given by hotel staff, guides, cleanliness of tea plantations, unique natural sceneries, unique climatic condition, variety of agro products and the tour packages offered for them since it combined with every facilities and services with regards to the tea-tourism. But there is a note worthy feature that majority of the visitors are not happy with the existing road system in tea plantation areas and also with the accessibility to tea plantation areas. As per the foreign Visitor Survey conducted by the Sri Lanka Tourist Board in 2001, it also highlighted the issue of transportation due to poor road system in the country.

These findings indicate the facilities, services and other products available in tea-tourism segment and how these will impact the tourist’s satisfaction during their stay in the tea plantation areas.

Value added methods play a major role of tourism marketing. In the scenario of tea-tourism segment, value added methods are in a highest priority of developing tea-tourism. In the present tea-tourism in Sri Lanka, there are many value added methods used by the respective stakeholders. In order to find out value added methods, study found the following broader areas

i.e. Activities based on tea, Variety of promotions and Product development.

## **Value Added Methods for the Product Development of Tea-tourism**

### **1) Activities Based on Tea**

#### **Events:**

1. Tea cultural dance at hotels
2. Tea Festivals
3. Tea day at hotels, restaurants especially in tea plantation areas
4. Form a tea cultural dance group

#### **Awareness Programmes:**

1. Demonstrate how tea developed during the British period up to now
2. Demonstrate to make good cup of tea to the tourists
3. Create environment to tasting tea in different elevation levels of Sri Lanka
4. Get awareness of tourists about how tea beneficial for our health

#### **Special Interests**

1. Arrange time tourists to plucking tea with plantation workers
2. Arrange tea tours to see tea factories, beautiful sceneries, rural lifestyle of the people, colonial tea bungalows, tea museums
3. Introduce more Tea trials
4. Introduce Tea Camp Sites
5. Welcome all tourists by offering Tea as a welcome drink at hotels

6. Introduce Tea Farm or Home Stay in small tea plantation in a different geographical area to get different kind of experience to tourists.
7. Take tourists to show Colombo tea auction
8. Joint venture Cable Car in the plantation Valleys

## **2) Variety of Promotions**

1. Invite world reputed “Tea Lovers” to Sri Lanka
2. Designate “Tea Brand Ambassador” in connection with tea-tourism
3. Promote Health aspects of tea drinking
4. Introduced many kind of quality tea with international standard  
e.g. Tradition of English breakfast tea, English dark tea, etc.
5. Offer a free cup of tea and sample pack of assorted tea bag pack with tips and maps of tea plantation areas to the tourists when they arrive at the airport with the association of Sri Lanka Tea Board and other respective stakeholders in tea-tourism
6. Creation of DVD or documentary film on tea-tourism in Sri Lanka
7. Promote Tea-tourism through Srilankan Cricket team

## **3) Product Development**

### **Quality and Standard**

1. Maintain quality standards of tea
2. Create tea culture in the hotels

### **Infrastructure**

1. Introduce Tea Centres, shops at hotels and Kiosk belongs to the popular tourists routes and public areas
2. Convert abandoned tea factories into tea museums
3. Introduced Tea Information Centres in the hotels and tourists routes

### **Souvenirs**

1. Encourage respective companies and local people to create a Tea Souvenirs eg. Bonsai tea pot as a gift, handicrafts from tea, etc.
2. Introduce tea commodities e.g. Tea soap, Tea shampoo, herbal teas, etc.
3. Create good tea tour itineraries for tourists

As per the authors view, value added methods used in Sri Lanka at present in tea-tourism segment is not enough to fulfill the expectation of visitors. As mentioned in the above, there are many areas that can be used to develop the value added services and products. Especially to cater the products to the visitors in this market segment, respective authorities in tea, travel and tourism trade have to mainly focus on tea as a commodity to develop respective value added products to this segment.

Furthermore, Table 4.2 indicates that related activities existing in the tea plantation areas with regards to the tea-tourism in Sri Lanka.

**Table 4.2** Some Activities in Tea-tourism in Sri Lanka

| <b>Activities</b>                         | <b>Location</b>  |
|---|--|
| Visiting sightseeing                      | Hill country, tea landscapes, villages                           |
| Visiting Tea shops                        | In many areas  |
| Visiting Tea factories                    | In Tea plantations   |
| Visiting souvenir shops                   | Hill country   |
| Visiting Tea museums                      | Tea plantation areas   |
| Visiting Colonial bungalows               | In tea plantations   |
| Visiting to see Tea plucking & processing | In tea plantations<br>In tea plantations                         |
| Trekking tea plantations                  | In many areas  |
| Tasting Ceylon tea                        | In tea plantation areas  |
| Exploring & learning about Ceylon tea     | In rural and remote areas<br>In remote areas, in tea plantations |
| Exploring rural lifestyle                 | Hill country, tea landscapes                                     |
| Cycling                                   | Hill country, tea landscapes, rural and remote areas             |
| Mountaineering                            |  |
| Bird & Animal watching                    |  |

**Table 4.2** (Continued)

| <b>Activities</b>           | <b>Location</b>  |
|-----------------------------|--|
| Camping                     | In Tea plantations, rural and remote areas                                 |
| Water sports                | Rivers, waterfalls   |
| Visiting recreational parks | Hill country   |
| Home stays                  | In tea plantations, rural and remote areas                                 |
| Visiting Agro farms         | In tea plantations, rural and remote areas                                 |
| Visiting Agro forests       | In tea plantations, Agro farms,  |
| Visiting Arboretum          | Hill country, tea plantation areas,  |
| Visiting Ornamental gardens | rural and remote areas   |
| Hiking                      | Hill country, rural and remote areas<br>Hill country                       |
| Taste of local foods        | Hill country, in tea plantations, rural and remote areas<br>In many places |

**Source:** Compiled by the author based on the information from  
<http://www.srilanka.travel>,  
<http://impressions.com.my/agro/agromain.htm>

Summarizing all the facts under the first objective, this study describes the existing facilities, services, other products and the ways to find out value added methods which the tea-tourism sector can offer for the visitors through tea-tourism experience in the country based on the research findings and other previous studies.

Existing products, facilities, services available in tea-tourism segment have been illustrated as follows:

“Sri Lanka is a large island which, as well as offering a beach environment, also a rich exotic variety of wild life, verdant vegetation and ancient mountains.” (Hall, 2000, p.233)

“Sri Lanka is the pearl of the Indian Ocean and is known for its diverse cultures and scenery. An island of 65,610 sq.km just 4 degrees north of the equator, ascending from sea level to approx. 2,400 meters or 7,800 feet, it has been blessed by nature resulting in diverse array of climate and scenery.” (SLTB, 2007, p3)

“One of the many names by which Sri Lanka was known in the past is “Serendib”, from which “Serendipity” was coined by Horace Walpole to Mean “, “the faculty of making happy discoveries by accident”. One of the happy discoveries the pioneer tea planters in the latter part of the 19<sup>th</sup> Century discovered is the effect of the diverse climates on tea production. The serendipity discovery has resulted in an array of fine teas which are unique to each agro climatic district and not found anywhere else in the world, but also not found in the other agro climatic districts of Sri Lanka” (SLTB, 2007, p3).



“Sri Lanka (Ceylon Tea) has a high quality product and famous in the world for its quality and taste. However, the country has still not moved away from price competition and project “Ceylon Tea” as a quality product which is not cheap” (SLTB, 2007, p. 14).

#### **4.2.2 Objective 2: Investigate the Market Potential and Identify Existing Problems, Main Challenges and Reasons behind them in Tea-tourism Development in Sri Lanka**

##### **4.2.2.1 Investigate the Market Potential for Tea-tourism**

When considering the places of visits in Sri Lanka as per this study, high preferences were given by the visitors to Colombo City, Kandy, and Beaches in South, Elephant Orphanage, Sigiriya/Dambulla and Nuwara Eliya. Visiting the tea plantation areas, more than one-third of the visitors travelled to Sri Lanka highlighted that, there is a trend towards to the tea plantations and apart them study concluded that Nuwara Eliya and Kandy areas mostly preferred by the visitors to experience tea-tourism. This noteworthy feature was highlighted by the Airport Survey conducted by the Sri Lanka Tourist Board in 2005 as well. Furthermore, study concluded that there is a trend of more tea tourists towards Nuwara Eliya than Kandy area to experience tea-tourism. Furthermore, the every stakeholder indicated that Sri Lanka has a huge potential to develop tea-tourism as an alternative tourism market segment.

In terms of the awareness on tea plantations and “Ceylon Tea” the research concluded that more than seventy-five% of the visitor’s had prior awareness of the above areas through Internet, TV, Newspapers & Magazines and Friends & Relatives.

In terms of the potential for tea-tourism, study concluded that there is a huge potential for tea-tourism since the hill country has many natural attractions with unique climatic conditions.

### **Proposed Areas for the Tea-tourism Development in Sri Lanka**

In addition to the above, study mainly identified two geographical areas hill country: Bogawantalawa, Maskeliya, Uda Pussellawa, Haputale, Hatton, Nuwara Eliya Bandarawela, Talawakele, Kandy and low country: Deniyaya, Morawaka, Hiniduma and Rakwana for the further development of tea-tourism in Sri Lanka.

#### **4.2.2.2 Identify Existing Problems, Main Challenges and Reasons behind them in Tea-tourism Development**

Existing problems, main challenges and reasons behind them highlighted from each stakeholder throughout the study and the same is summarized according to the stakeholder category as follows:

**Table 4.3** Challenges/Issues/Problems and Proposed Solutions in Tea-tourism Development

| <b>Problems/Challenges/Issues</b>  | <b>Proposed solutions by Stakeholders</b>  |
|--|--|
| <ul style="list-style-type: none"> <li>▪ Lack of co-ordination and understanding between stakeholders</li> </ul> | <ul style="list-style-type: none"> <li>▪ Respective government agencies should take the leadership &amp; form a Task Force to work under the proper strategic plan</li> <li>▪ Work as a team towards to the common goal</li> <li>▪ Awareness the stakeholders and local community on tourism business</li> <li>▪ Form a strategic working group committee by representing each stakeholder area</li> </ul> |

|  |  |
|--|--|
| <ul style="list-style-type: none"> <li>▪ No Policy formulation and implementation for tea-tourism</li> </ul> | <ul style="list-style-type: none"> <li>▪ Policies to be formulate and government give more priority to tea-tourism</li> </ul>  |
| <ul style="list-style-type: none"> <li>▪ No government priority for tea-tourism</li> </ul>                   | <ul style="list-style-type: none"> <li>▪ Respective government agencies should take the leadership by offering highest priority</li> </ul>   |
| <ul style="list-style-type: none"> <li>▪ Incorporate tea-tourism into overall tourism strategy</li> </ul>    | <ul style="list-style-type: none"> <li>▪ Joint promotions, product development, awareness programs &amp; policy development</li> <li>▪ Marketing &amp; Promotion plan to be prepare by the Task Force</li> </ul> |

**Table 4.3 (Continued)**

| <b>Problems/Challenges/Issues</b>   | <b>Proposed solutions by Stakeholders</b>  |
|---|--|
| <ul style="list-style-type: none"> <li>▪ Product development</li> </ul>   | <ul style="list-style-type: none"> <li>▪ Get expertise knowledge &amp; best practices</li> <li>▪ Awareness relevant stakeholders, hoteliers, restaurant owners, tea industry on product development through best practices</li> </ul>  |
| <ul style="list-style-type: none"> <li>▪ Lack of financial support for the new income generating opportunities</li> </ul> | <ul style="list-style-type: none"> <li>▪ Government involvements for investment opportunities</li> </ul>   |
| <ul style="list-style-type: none"> <li>▪ Changing of climatic conditions in tea areas</li> </ul>                          | <ul style="list-style-type: none"> <li>▪ Awareness the people on climatic issues &amp; respective government bodies takes initiatives</li> </ul>   |
| <ul style="list-style-type: none"> <li>▪ Lack of Awareness of new emerging trends in tourism sector</li> </ul>            | <ul style="list-style-type: none"> <li>▪ All stakeholders, government &amp; private partners to be educated on new emerging concepts, market trends, new innovative ideas &amp; its benefits</li> </ul>  |
| <ul style="list-style-type: none"> <li>▪ Lack of events to attract tourists</li> </ul>                                    | <ul style="list-style-type: none"> <li>▪ Introduce annual events with collaboration of stakeholders</li> </ul>   |
| <ul style="list-style-type: none"> <li>▪ Less strategic approach</li> </ul>   | <ul style="list-style-type: none"> <li>▪ Strategic plan with specific initiatives involving all stakeholders</li> </ul>  |
| <ul style="list-style-type: none"> <li>▪ No proper promotion &amp; marketing strategies</li> </ul>                        | <ul style="list-style-type: none"> <li>▪ Jointly launch an advertizing campaigns overseas &amp; locally</li> <li>▪ Involvement of Sri Lanka foreign mission for the promotion activities in abroad</li> <li>▪ All stakeholders should allocated capital for the future promotions</li> </ul> |

|   |   |
|---|---|
|   | <p>which to be join with other stakeholders through the involvement of Task Force</p> <ul style="list-style-type: none"> <li>▪ Identify key tour operators who are willing to promote tea-tourism</li> <li>▪ Formulate proper promotion &amp; market strategies by the respective government bodies getting support from expertise by the Task Force</li> </ul> |
| <ul style="list-style-type: none"> <li>▪ Lacking of new innovative ideas when creating a tourism product</li> </ul> | <ul style="list-style-type: none"> <li>▪ Awareness relevant stakeholders, hoteliers, restaurant owners, tea industry on product development through best practices</li> </ul>   |
| <ul style="list-style-type: none"> <li>▪ Lack of research undertaken for tea-tourism</li> </ul>                     | <ul style="list-style-type: none"> <li>▪ Sri Lanka Tourism Board and the Sri Lanka Tea Board should take leadership to conduct periodical research on impact assessments, environmental assessments, visitor surveys, etc. by the assistance of relevant private sector stakeholders or donor agencies.</li> </ul>  |

**Table 4.3 (Continued)**

| <b>Problems/Challenges/Issues</b>   | <b>Proposed solutions by Stakeholders</b>   |
|---|---|
| <ul style="list-style-type: none"> <li>▪ Inadequate entertainment facilities</li> </ul>               | <ul style="list-style-type: none"> <li>▪ Awareness to hoteliers, restaurants, entertainment facility providers should be given on this through best practices which facilitates by Sri Lanka Tourism Board and travel &amp; tourism industry</li> </ul> |
| <ul style="list-style-type: none"> <li>▪ Lack of tourism literature for tea-tourism</li> </ul>        | <ul style="list-style-type: none"> <li>▪ Develop market oriented brochures, magazines, CD's which relates to tea-tourism together with MOT, SLTDA, Sri Lanka Tea Board and private sector stakeholders focusing target markets and products</li> </ul>  |
| <ul style="list-style-type: none"> <li>▪ Providing of more benefits to the local community</li> </ul> | <ul style="list-style-type: none"> <li>▪ Respective stakeholders should use the pro-tourism strategies in order to provide more benefits to the local community under the leadership of respective government authorities</li> </ul>                    |

|  |  |
|--|--|
|  | <ul style="list-style-type: none"> <li>▪ Awareness of all stakeholders on best practices of pro-poor tourism</li> <li>▪ Establish pro-poor partnerships with the private sector stakeholders</li> <li>▪ Respective stakeholders put poverty issues in connection with tea-tourism in the tourism agenda</li> <li>▪ Pro-active practical partnerships to between stakeholders in travel &amp; tourism and tea industry, NGOs, and local authorities to maximize benefits</li> </ul> |
|--|--|

The potentiality of tea-tourism in Sri Lanka is substantiated by the fact that though the country is a small island in the world, there are many tourism attractions scattered in this small area. In the same way there are many tourism products in place for the tourists for a long time. Like wise, by considering the tea industry it has a tremendous potentiality in the aspects of tea as well as in the tourism industry in Sri Lanka. Though these two segments have tremendous potential, most of stakeholders in the two industries have not successfully explored the potential in tea-tourism due to many reasons.

“Sri Lanka, though relatively small in size, is the world’s second largest tea producer behind China. Most of the tea produced in countries like India and China is consumed domestically. Sri Lanka however exports most of its tea, making it the world’s largest exporter of tea. In other words, Sri Lankan teas have been developed to cater to the tastes of tea drinkers all around the globe. The various teas of Sri Lanka are marketed world-wide under the term “Ceylon Tea” and discerning tea drinkers look for specialty teas from amongst the range of Ceylon Teas produced right throughout the year. It has been said that Ceylon Tea is Sri Lanka’s gift to the world.” (SLTB, 2007, p3)

The climatic and environmental factors also establish the potential of tea industry in the country. “Sri Lanka, with consistent tropical weather conditions allows tea to be grown as a perennial crop. Sri Lanka’s climate is ideally suited to producing a variety of teas of high quality, appealing flavours and aromas. Dr. P.D. Collier, Chairman of the European Tea Technical Committee, once informed an international forum held in Sri Lanka that Ceylon tea was one of the cleanest teas produced, with an insignificant level of pesticide residue” (Jayatilake, 2003).

In addition to the secondary sources of support on the market potential for tea-tourism in the country, the respective stakeholders employed to gather their opinions and views in connection with the above objective throughout the study.

According to the study, the following will reflect some of the market potential for tea-tourism:

Sri Lanka has been predominantly known as a beach destination in the world for a long time. Since declining of the tourist arrivals especially from the European countries due to security situation of the country and other reasons, government has decided to positioned Sri Lanka as a “Beyond Beaches” by introducing “Alternative Tourism” in other words “Niche” markets. According to the study, majority of the visitors travelled for holiday/vacation/leisure and of them majority preferred nature and sceneries as a special interest to visiting Sri Lanka than sun and beach. This revealed that nature and sceneries are fast becoming more popular than beaches among foreign visitors travelling to Sri Lanka. This depicts that the visitor preference is moving towards to the nature and scenery products beyond beaches.

### **4.2.3 Objective 3: To Identify the Factors Need to Incorporate the Tea into Tourism Sector**

The stakeholders were identified that the both tea and tourism sectors have not incorporated with each other hence it will negatively affect the tea-tourism development in the country. Therefore, they have identified Joint Promotions and Marketing, Product Development and Awareness Programmes as a mechanism to incorporate in both the sectors mentioned above.

#### **Joint Promotions and Marketing:**

Stakeholders pointed out that though each sectors contributes to tea and tourism, the respective marketing and promotions done by the each sector by their own. Though their sectors are different, having joint promotions and marketing programme will impact the both sectors and as a result it will positively impact the tea-tourism development through better cooperation among two sectors. Therefore, by considering the above, stakeholders suggested formulation of a mechanism to involve stakeholders within the respective sectors through events and by facilitating through each respective government organization. In addition to that there are many tea related annual conferences, annual exhibitions happening all over the world. This study suggested that to facilitate to bringing such an event to Sri Lanka by working together with responsible companies or organization in each sector hence both sector will benefit through this kind of a process and finally it will have a positive impact on tea and tourism in other words tea-tourism in the country. In order to incorporate these sectors, respective government organization should conduct open forums periodically on the development of this sector to share the knowledge and experience of all stakeholders in tea-tourism.

### **Product Development:**

By considering above, stakeholders suggested that:

1. Under the leadership of respective government authorities in tea and tourism sector, all private sector stakeholders in both sectors and local community should jointly involve with suitable mechanism to the product development process in the tea-tourism.

2. More focus on activities which relates to tea such as tea festivals, tea day, tea food festivals, etc. by joining with respective stakeholders in both sectors.

3. Help local people to enter into the tourism business i.e. creation of souvenirs, start of tourist shops, restaurants, etc. under the leadership of the respective government authorities with other stakeholders by considering the product development.

4. Respective authorities in the travel and tourism sector and tea sector can develop their products i.e. creative tour itineraries, creative tourist brochures, tourist information centers, construction of view points in tea plantation areas, introduce more entertainment activities, creating tea culture within hotels and restaurants especially in tea plantation areas, introduce cyber cafes, introduce tea shops and tea centers, increase more transportation facilities, theme parks, under the leadership of respective government authorities in both sectors to incorporate tea-tourism into overall tourism strategy.

### **Awareness Programs:**

Study found that awareness programs can play a major role to incorporate tea-tourism into overall tourism strategy by giving higher priority from the respective government authorities in both sectors through awareness programs for the stakeholders in the tea plantation sector, travel



and tourism sector, local community and tourists since this is a new market segment. Since tea is one of the major products in tea-tourism, hotels, airlines, tour operators, travel agencies can initiate various kinds of awareness programs mentioned below in connection with tea-tourism with the assistance of the respective stakeholders in the tea industry: Awareness of health benefit aspects of tea, Awareness of how to make a good cup of tea, Awareness of making curries by using tea, Awareness of wellness and spa through tea.

In addition to that scholars suggested that offer cup of tea in the flights with the brand name of “Ceylon Tea” for every visitor travels to Sri Lanka with the cooperation of airline companies, respective stakeholders in the travel, tourism and tea sectors under the leadership of respective government authorities in both sectors in order to incorporate tea-tourism into overall tourism strategy.

### **Formulating New Policy Decisions**

The study found that formulating new policies such as government higher priority to this sector, formulation of promotion and marketing strategies, strategies for pro-poor tourism, policies for the new investors for this market, etc. highly impact to strengthen the cooperation among related stakeholders in the tea-tourism sector hence this process help to incorporate tea and tourism sectors together.

#### **4.2.4 Objective 4: To Identify the Ways How Community Can Benefit from Tea-tourism**

When considering the socio and cultural aspects of tea-tourism, the following research findings were obtained from the local community in the plantation sector on the level of satisfaction was “Strongly Agreed” for the “Social life get benefits from tea-tourism” and “Tourists can see way of life of

the people in the tea plantations” and they “Agreed” that “Tourism creates social problems like criminality, alcoholism and drugs” in their areas. The noteworthy feature is that community has doubt about the “exposure to other culture and languages”, “Damaging a rural life style due to too many visitors” and “Motivation to learn English” due to development of tea-tourism.

Furthermore, this study indicates that majority of the households members are low income gaining community in the tea plantation areas. It is noteworthy feature that all household members indicated this level of income is insufficient to run their families when questioning whether this income is quite enough to run their families. In addition to that study shows nearly 88% of the family’s having two people who employed. In other words, as an average there are two people employed in a one family unit. Therefore, providing maximum benefits from such a segment like tea-tourism to the local community is necessary for them to increase their social life.

Therefore, this study identified following suitable mechanisms to give the maximum benefits to the local community in developing tea-tourism by considering the long-term economic benefits through environmental protection by stimulating local community development.

1. Provide training to middle management and local community by aiming to generate additional income opportunities through small and medium enterprises.

2. Introduce modern technology in the tea industry hence which the quality of the tea production could be increased. This will benefit local community since the increase of foreign exchange earning due to above mechanism

3. When development of tea-tourism would create more employment opportunities and it would help to improve their quality of life.

4. Respective stakeholders i.e. hotels, restaurants, etc can support to the local community by introducing appropriate mechanism to buy their local products such as vegetables, dairy product, local handicrafts, etc.

5. Improve the wealth of the plantation local community by facilitating water supply and sanitation facilities, upgrading their living standards, hospitals, etc.

6. Form of social welfare fund by the respective tea stakeholders for the community belongs to them by allocating considerable percentage of their profits for the development of and betterment of the local community in the tea plantation industry.

7. Respective government authorities related to tea-tourism sector should take initiatives to give necessary training and necessary skill development training on product development, guiding, etc to the local community to enter into tourism business.

8. Awareness the local community on tourism business by the respective government and private sector authorities

9. Provide incentives to involve local community to the small & medium enterprises on tourism.

10. Establish Satellite schools or similar body to train required manpower for the tea-tourism sector

11. Establish close co-operation within the community by the respective stakeholders especially plantation sector stakeholders by facilitating the local community (tea plantation workers) to uplift their economic and living standards within the tea plantation sector.

To make the recommendations to meet the challenges mentioned in this study are discussed in section 4.3 based on the SWOT analysis, findings of this study and previous researches. Therefore, following section continue with the SWOT analysis of tea-tourism in Sri Lanka, followed by the discussion of

findings on different stakeholder categories before begins recommendations to the study.

#### **4.2.5 SWOT Analysis of Tea-tourism in Sri Lanka**

##### **Strengths**

1. Renowned brand name of “Ceylon Tea”
2. World largest tea exporter
3. World second largest tea producer
4. More than 140 old Colonial tea history
5. Wide spread beautiful tea gardens, colonial tea plantation bungalows and tea factories, local hospitality, expertise knowledge and tea tradition
6. Availability of well developed tea industry
7. Availability of many tourism attraction places in tea plantation areas
8. Beautiful tea landscapes, unique climatic condition
9. Enough quality accommodations facilities in tea plantation areas
10. Diversified tea products with different kind of taste and flavours

##### **Weaknesses**

1. Lack of coordination among stakeholders
2. Poor integration between agencies responsible for tea & agencies responsible for promoting tourism
3. Lacking of new innovative ideas when creating a tourism products
4. Working as independently rather than working as a team by the respective stakeholders in tourism as well as in the tea-tourism
5. No proper marketing and product development strategy in tea-tourism

6. Lack of promotional opportunities in tea-tourism
7. Instability situation of the country due to terrorism
8. Not yet used satisfactory of the strength and opportunities that Sri Lanka has in tea-tourism context
9. Lack of financial support for new business for local community
10. Lack of research undertaken in the area of product development and value added products as well as quality souvenirs
11. No proper infrastructure facilities
12. No awareness on this new market segment especially for the plantation and local community
13. No proper quality standard products
14. Lack of tea tourism events to attract tourists to the country
15. Lack of entertainment facilities Lack of financial support to start the new income generation opportunities for estate workers
16. Infrastructure problems
17. Lack of water supply and sanitation facilities
18. Lack of awareness on tourism and tea-tourism
19. No strategic approach
20. Conflict between tea plantation companies and plantation workers' unions Lack of tourism literature available for tourists on tea-tourism

### **Opportunities**

1. Minimum competition in tea-tourism market segment with other destinations
2. Largest beverage consume by the people
3. Diversified into many geographical areas
4. World trend for nature

5. Increase trends towards nature based tourism
6. Emphasis on Wellness & Spa

### **Threats**

1. Migration of skill labour
2. Lack of productivity
3. Changing of climatic condition in tea plantation areas will affect to quality and taste of the tea
4. Malnutrition in the plantation sector
5. Level education in the tea plantation sector
6. Security situation in the country

## **4.3 Recommendations and Suggestions**

### **Objective 5: Make Recommendations to (a) Agro-tourism Sector (including tea tourism sector) and (b) Stakeholders for the Future Development**

The following recommendations are summarize by based on the results of study, recommendations made by the stakeholders, their expectations and suggestions in tea-tourism to the future tea-tourism development in Sri Lanka.

#### **4.3.1 Recommendations for the Government**

1) The research indicated that tea and tourism sectors are working isolate according to their own development plans, And also the study identified that the development of Tea-tourism new market segment has not being identified and also not included into development programs by both tea and tourism sector government organizations such as MOT, SLTDA, Sri Lanka Tea Board, MPI. Therefore, respective government organizations in both sectors should include the development of tea-tourism sector into their development programs and give high priority to the said sector. Finally, this sector should be

recognizing with highest priority to the development of tea-tourism sector in the country by including that into the national development plan.

(2) This study identified that there is a poor coordination among the stakeholders in this tea-tourism sector. Tea-tourism is currently promoting by single organizations with own objectives, without involving all stakeholder groups affected, lead to poorly balanced strategies. Government authorities in tea and tourism, stakeholders in tea and tourism, environmental and social groups, academics and local communities need to work jointly towards the development of effective tea-tourism policies. Therefore, respective government bodies should be involved to create better stakeholder cooperation and this study recommends initiating following mechanism for the said cooperation.

### **Recommendations for Stakeholder Cooperation to the Government**

1. Create a platform for better stakeholder cooperation through government and private sector partnership for tea-tourism development through ten (10) stakeholders identified by this study for the future tea-tourism development in Sri Lanka under the leadership of respective government bodies.
2. Respective government organizations should provide the necessary leadership to the respective stakeholders to achieve the expected goals.

3. The government should form a Task Force through the leadership by the respective government bodies for the implementation, monitoring and policy formulation of the tea-tourism development in the country by representing members from each identified stakeholder category for future development of tea-tourism. This recommends that, the Task Force should do the preparation, implementation and monitoring of the marketing and promotion plan continuously on the tea-tourism development. In addition to that, the respective feed back should be obtained from the respective stakeholders for Tea-tourism development in the country as well.

4. Set up the tea-tourism development action plan through clear direction towards to the expected goals through continuous proper monitoring system by the Task Force under the government leadership by consulting other related stakeholders.

5. Task Force should be identified the proper market segments and proper promotional tools and areas before preparation action plan. Since the Task Force is representing by members in each stakeholder indentified by the study, and then can get the inputs from the respective stakeholders for the above preparation.

6. Making policy measures, to conduct open forums periodically with stakeholders, active leadership by government authorities as being a leader by driving all stakeholders towards to the common goals to accelerate cooperation between stakeholders.



7. Government should facilitate to provide necessary awareness, training to the related stakeholders on tea-tourism development which identified by the Task Force. Especially this study indentified that awareness and training should be necessary to the plantation companies, travel and tourism stakeholders such as hotels, tour operators, guest houses, travel agencies, restaurants, tourist shops, provincial level government organizations, local plantation community, etc. Hence Task Force should pay more attention to the said stakeholders on awareness and training aspects. On the awareness aspects, government should identify the potential areas which can develop tea-tourism as indentified by this study and should do the awareness to respective people mentioned above. To this process respective government bodies should be launch an awareness programs by national wise focusing above potential areas for Tea-tourism development via provincial tourism authorities, NGO's, etc. On the training aspects, government should first train the training of trainers as a first step by representing each stakeholder areas according to the training plan prepared by the Task Force and these people can be used to use the people in the respective stakeholder areas. For this process this study recommends to get the expertise knowledge to train the training of trainers on the tea-tourism development in the country.

8. Government should take initiatives to provide maximum benefits to the local people in the tea-tourism business. As explained in the above, providing training and awareness will create a path to provide benefits to the local community. Government

should take initiatives to generate required manpower from the local community by establishing Satellite School in the potential areas for tea-tourism development in various areas such as Food and Beverages, house keeping, language training, skill development, Small & Medium enterprises development programs, handicrafts, etc. And also government should create a mechanism to recruit required manpower to the hotels and other related establishments from the locals in tea-Tourism areas, since this issue was indicated by the local community in this study as well. Moreover, respective stakeholders in the tea-tourism business should be awareness by the respective authority to support to the local community to buy their local products such as vegetables, dairy products, handicrafts, etc. required to the similar establishments.

9. Respective government authority, Ministry of Tourism, Sri Lanka Tourism Development Authority, Sri Lanka Tea Board and Ministry of Plantation Industries should be identifying the respective stakeholders who wish to promote this segment and to invest jointly by promoting the new segment.

10. Respective government bodies related to tea-tourism should support to the stakeholders by offering platform to bring tourists to Sri Lanka through international promotions.

11. Establish knowledge database by obtaining new ideas from stakeholders for the future development of the sector such as product development, promotions, marketing, policy making, etc.

(3) Respective government bodies related to tea-tourism should be create a mechanism to accelerate to promote a brand name of “Ceylon Tea” in abroad with the cooperation of the SLTDA and other stakeholders.

(4) To accelerate the product development process with the cooperation of other stakeholders by creating: proper brand strategies, marketing and promotional strategies, new policy formulations and joint promotions to promote the destination in tea-tourism in abroad.

(5) Government should take initiatives to find investors to this market segment through Board of Investment of Sri Lanka.

(6) Government should take initiatives to provide financial support to generate income generation opportunities to the local community with collaboration with other international donor agencies, NGO's, development banks and respective stakeholders under the leadership of political authority to enter them into the tourism business such as opening of restaurants, guest houses, tourist shops, tea centers, souvenir sops, self employments, agriculture farms, transportation services, etc.

(7) Government should initiate to consider conduct a pilot project on tea-tourism by focusing most potential areas for tea-tourism in near future.

(8) Respective government bodies and other stakeholders should be more concern on product development and value added methods in tea-tourism. This study recommends the following under the product development and value added methods which the government should concern in the Tea-tourism development in Sri Lanka.

## **Product Development**

1. Respective government authorities should provide expertise knowledge to the tea-tourism sector on product development.
2. Respective government bodies should create mechanism to involve all stakeholder sectors for the product development process through expertise knowledge, workshops, etc.
3. Use best practices from other countries in similar market segment especially the product development, promotions, stakeholder cooperation, local community involvements, etc.
4. Government should take initiatives on infrastructure development on tea-tourism:
  - a) Improvement of transportation system
  - b) Linking the road network from other destinations to tea plantation areas
  - c) Upgrade the existing road systems
  - d) Upgrade the railway transportation system
  - e) Improve water supply and sanitation facilities
  - f) Increasing of wealth of the local tea plantation community
  - g) Establish accommodation establishments, restaurants, tea centers, shopping malls
  - h) Built information centers
  - i) Construction of view points
  - j) Beautification programs of cities in respective tea plantation areas
  - k) Government should encourage travel trade and local community on the entertainment facilities in the country as especially in the tea-tourism development areas with the assistance of the tourism and hotel industry.

- l) Government should take initiatives to introduce a proper transportation system for the tourists with the cooperation of travel and tourism trade, local government and provincial councils. Respective government authorizes impose the necessary rules and regulations to impose to the transport providers to use the meters in the vehicles those who are working in the travel trade to facilitate tourists to maintain a transparency of the transportation charges.
- m) Government should encourage and awareness all stakeholders, local community on environmental protection concern and look together at the local resources and attractions with the assistance of the respective government bodies related to the environment concern issues, NGO's, collaborating agencies, community leaders and through media. This study identified that changing of environment conditions and climatic conditions heavily affected to the tea-tourism industry in Sri Lanka due to many effects such as environmental pollution, deforestation, etc. Therefore, respective government bodies should educate all stakeholders in Tea-tourism sector, local community especially youth on the above issue through proper awareness mechanism. As an example respective bodies can be focus the school children for the awareness by getting assistance from government bodies in education, health, environment, etc and NGO's, other educational institutions, private sector, etc since they act as a receptive audience and the travelers of the future.

- n) Respective government authorities should maintain a database for the products such as natural sceneries, archeological sites, tourism attraction places in a provincial wise where such a products exists.
- o) Respective government authorities should create a mechanism to strengthening the involvement of local communities in product development and the benefits they gain from it. Initially this study recommends that to provide required training by the government, NGO's and other collaborating agencies to the local community on the product development such as guiding, environmental management, customer care, etc. The importance of developing such programs with local people and private enterprises, to ensure they are tailored to need and have local ownership, has been stressed.

### **Value added products and services methods**

Respective government authorities should get expertise knowledge from tea and tourism sectors to introduce new value added methods to the tea-tourism sector. This study identified three broader areas: Activities based on Tea, Variety of promotions and product development and some of them are mentioned in detail as follows:

### **4.3.2 Recommendations for the Local Community**

- 1) Participate in environmental management, awareness programs and tourism planning when local administrators, related stakeholders organize public hearings.
- 2) Collaborate with government and local administrator to follow the rules and regulations and comply with sustainable tourism development.
- 3) Take care of environment and educate descendants to participate to environmental management and build up awareness of environmental protection to them since they are at primary and secondary school level.
- 4) Never ignore activities which will destroy the environment or culture, always inform local administration.
- 5) Improve skills to enter into tourism business.
- 6) Mainly focus on product development especially quality, standards of the tourism products such as restaurants, tourist shops, souvenirs, etc. by consulting respective stakeholders, especially government authorities in relating to the tea-tourism.
- 7) Tight relationship with Tea and Tourism trade stakeholders
- 8) Involve family members as partners into their tourism businesses it gives some more weightage to successful their future tourism business
- 9) Give more priority to the customers, tourists to fulfill their expectations in the local environment

### **4.3.3 Recommendations for All Private Sector Stakeholders in Tea-tourism**

Though the respective government organizations are suggested to act as a leadership organizations, private sector stakeholders are the key players in the new market segment. Therefore following recommends by this study to the future development of tea-tourism in Sri Lanka.

1) All stakeholders should be working through closer cooperation with the respective government bodies towards to the common goal in tea-tourism

2) They should be more focus on the community benefits which the sector provides to the local community in a sustainable manner and should support to the government to achieve this. Especially plantation sector and tourism sector stakeholders should focus more on community benefits which the local community can be benefited through tea-tourism.

3) All stakeholders should be closely and actively working together with other stakeholders in tea-tourism development.

4) More focus on product development, value added methods in products and services since the expectations and visitor requirements are rapidly changing over time always and also to main the uniqueness to the country in tea-tourism.

5) All stakeholders should be more concern on the new innovations in this market segments to attract visitors and fulfill their expectations.

6) All stakeholders should be more concern on the environmental issues and always try to contribute to protect the environment through active participation with relevant authorities.

7) All stakeholders should maintain better marketing strategies and promotional strategies to market their products in tea-tourism and get best practices use by other countries in similar area.



#### **4.4 Recommendations for Further Study**

Since there is inadequate research studies carried out by the sectors in connection with the tea-tourism, especially to identifying the market segments, the new tourism products, the environment issues and economic impacts. Hence, this recommends necessary research studies should be carried out periodically in order to develop tea-tourism sector by the respective government authorities with the assistance of all other stakeholders in the industry. And also Government should initiate to consider doing a pilot project on tea-tourism by focusing most potential areas for future tea-tourism in the country through the research.

In the final conclusion it can be noted that tea-tourism makes an enormous impact in any environment but more particularly in Sri Lanka where the benefits have been manifold. While benefitting the economy through its existence, a more important aspect that tea-tourism has contributed to the social and cultural dimensions more as a unifying force for the preservation of the cultural authenticity and national identity which exists even to this day. Realizing the importance of this sector, the government can not ignore but take every possible measure towards developing and nursing this industry and continue to lead this industry as a global leader.

#### **4.5 Limitations of the Study**

1) Data from international visitors collected by the survey at the Colombo International Airport during December 2007. Stratified random sampling method employed to collect the respective data and population were stratified according to the country of residence of the tourists only by based on previous year tourist arrivals to the country due to limitation of the time. The seasonality effect of the tourist arrivals had to neglect to collect the data from the visitors due to time frame. Due to limitation of the time this study focused only international visitors though the domestic visitors also important to consider when conducting this kind of survey.

2) Though the potential tea plantations for tea-tourism are scattered in hill country, mid country and low country hill country area was taken into consideration to collect respective data due to the limitations.

3) Though there are more stakeholders are working under the tea and tourism industry, selection of sample size for tourism and tea related stakeholders had to be limited to 30 due to time constraint.

4) Under the collection of information with regards to the local community, selection of area to collect the data had to be reduced up to three areas in the tea plantation sector by considering the time frame since the households are scattered far away from each other and it is very difficult to get the permission from the respective plantation companies to conduct the survey in their tea plantation estates.

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## APPENDIX A

### QUESTIONNAIRE FOR INTERNATIONAL VISITORS

d d m m y y

Date 

|  |  |  |  |  |  |
|--|--|--|--|--|--|
|  |  |  |  |  |  |
|--|--|--|--|--|--|

Interviewer: .....

Sample

Supervisor's signature: .....



### Survey on Agro-Tourism in Sri Lanka: A Case Study of the Tea Industry

The aim of this survey is to collect data and information for a thesis for the International Master of Business Administration (MBA) program at the Faculty of Hospitality and Tourism, Prince of Songkla University, Phuket Campus, Thailand. The information collected with this questionnaire will be used only for academic purposes and kept confidential. Your kind cooperation in this regard is highly appreciated.

Indrajith De Silva-Researcher  
Sri Lanka Tourism Promotion Bureau

**Agro- tourism is “Travel that combines agricultural or rural settings and products within a tourism experience”**

#### Screen Questions

1. What is the main purpose of your visit to Sri Lanka?
- i. Holiday/vacation/leisure            ii. Business
-

iii. MICE  iv. Visiting Friends & Relatives

v. Other (please specify):

.....

*(If transit discontinues the interview)*

**Part 1: Visitor preferences, activities & expenditures**

**(Please mark (✓) all appropriate boxes)**

2. If Holiday/vacation/leisure, what was your special interest for visiting Sri Lanka? *(Multiple choice question)*

i. Sun & Beaches  ii. Nature & Sceneries

iii. Rock climbing  iv. Culture & Heritage

v. Water sports  vi. Shopping

vii. Wildlife Safaris  viii.

Ayurvedic treatment

ix. Cyclicling  x. Other (please specify):

.....

3. What are the places did you visit during your stay in Sri Lanka?

*(Multiple choice question)*

i. Kandy  ii. Nuwara Eliya/Bandarawela

iii. National parks  iv. East Cost

v. Sigiriya/Dambulla  vi. Horton Place

vii. Anuradhapura  viii. Polonnaruwa

x. Beaches in south  xi. Elephant orphanage



- xii. Botanical Gardens
- xiii. East Coast
- xvi. Colombo City
- xv. Other (please specify): .....
4. What were the activities done in the above places? (**Multiple choice question**)
- i. Water sports
- ii. Cycling
- iii. Wild life safaris
- iv. Bird watching
- v. Ayurvedha treatments
- vi. Cultural site visits
- vii. Beach
- viii. Visiting of tea plantations
- x. Visiting of rural villages
- xi. Camping
- xii. Shopping
- xiii. Visiting of tea plantations
- xiv. Rock climbing
- xv. Visiting of agro farms
- xvi. Other (please specify): .....

5. During your stay did you visit tea plantations?

Yes  No

**If Yes, continue, else go to Question No. 37**

6. What are the places you visited to see tea plantations?

(**Multiple choice question**)

i. Nuara Eliya

ii. Kandy

iii. Hatton

iv. Bandarawela

v. Badulla

vi. Other (please specify): .....

7. In which of the following activities you participated in the above places?

(**Multiple choice question**)

- i. Visiting sightseeing of the tea plantations
- ii. Visiting to Tea shops
- iii. Visiting tea factories
- iv. Visiting to souvenir shops
- v. Trekking of tea plantations
- vi. Tasting Ceylon Tea
- vii. Visiting to see tea plucking & tea processing
- viii. Exploring and learning
- xi. Exploring rural life style of the community
- xii. Cycling
- xiii. Other (please specify):  
.....

8. Please indicate your level of satisfaction for the activities done in the tea plantations? (**Please indicate your level of satisfaction by 10: Highest interested to 0: Not interested in the given space for each activities**)

10 ←———— Highest interest                      Lowest interest →  
**0**

- i. Visiting sightseeing of the tea plantations                      ..... ii. Visiting tea shops .....
- iii. Visiting tea factories                      ..... iv. Visiting souvenir shops .....
- v. Trekking of tea plantations                      ..... vi. Tasting “Ceylon Tea” .....
- vii. Visiting see tea plucking & tea processing                      ..... viii. Exploring and learning .....
- xi. Exploring rural life style of the community                      ..... xii. Cycling .....
- xiii. Other (please specify):  
.....

9. What are the most interesting places you enjoyed in the tea plantation areas? (Please indicate your level of satisfaction by:

4 refers to the **most interested**, 3 refers to **more interested**, 2 refers to **interested** 1 refers to **less interested**, and 0 refers to not **interested**)

|                    |                          |                          |                          |                          |                          |
|--------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
|                    | 4 Highest interest ←     |                          |                          |                          | Low → interest           |
|                    | <b>0</b>                 |                          |                          |                          |                          |
|                    | 4                        | 3                        | 2                        | 1                        | 0                        |
| i. Kandy           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ii. Nuwaraeliya    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| iii. Hatton        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| iv. Bandarawela    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| v. Badulla         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| vi. Maskeliya      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| vii. Udupussellawa | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|                    | <input type="checkbox"/> |                          |                          |                          |                          |
| viii. Haputale     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| x. ....            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| xi. ....           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

10. Were there any activities and places you found in the tea plantation areas in Sri Lanka that you were previously unaware of:

Yes  No

If Yes, (please specify):

.....

11. Please indicate the type accommodation If you stayed in the tea plantation area during your stay in Sri Lanka?

Tea Plantation Bungalow  Private accommodation   
 Hotel  Guest House

Other (please specify):

.....

12. a. How many nights you spent in the tea plantation area?.....

- b. How many nights you spent during this visit in Sri Lanka?.....
- c. How much did you spent during your stay in Sri Lanka (excluding airfare)?US\$....
- d. How much did you spent during your staying in the tea plantation area? US\$.....
- e. How many people does this expenditure covers?.....

**Part 2: Agro-tourism Resources and tourist perception  
(Please mark (✓) in the appropriate box after each evaluation criteria)**

|  | Strongly<br>Disagree | Strongly<br>agree | Agree                    | Not Sure                 |
|--|----------------------|-------------------|--------------------------|--------------------------|
| 13. Sri Lanka has many nature attractions/places<br><input type="checkbox"/> <input type="checkbox"/>                                |                      |                   | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. Safe as a travel destination<br><input type="checkbox"/> <input type="checkbox"/>  |                      |                   | <input type="checkbox"/> | <input type="checkbox"/> |
| 15. Has a high degree of accessibility of road<br><input type="checkbox"/> <input type="checkbox"/>                                  |                      |                   | <input type="checkbox"/> | <input type="checkbox"/> |
| 16. Good place to take children<br><input type="checkbox"/> <input type="checkbox"/>   |                      |                   | <input type="checkbox"/> | <input type="checkbox"/> |
| 17. Good place for honeymoon destination<br><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>               |                      |                   | <input type="checkbox"/> | <input type="checkbox"/> |
| 18. Hill country has unique natural sceneries<br><input type="checkbox"/> <input type="checkbox"/>                                   |                      |                   | <input type="checkbox"/> | <input type="checkbox"/> |
| 19. Climatic condition in hill country is unique<br><input type="checkbox"/> <input type="checkbox"/>                                |                      |                   | <input type="checkbox"/> | <input type="checkbox"/> |
| 20. I am happy with the environment in tea plantations<br><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |                      |                   | <input type="checkbox"/> | <input type="checkbox"/> |

21. I am happy with the activities done in the tea plant
22. I am happy with the tour package with tea plant
23. Tour package included everything in tea plant
24. Taste of the Ceylon Tea is extremely good
25. Quality of accommodation in hill country is good
26. I am happy with the services of the hotel staff
27. Guides/Interpreters have a good knowledge
28. I am happy with the cleanliness of plantation areas
29. Many agro products available in tea plantation areas
30. Visiting of tea factories is unique
31. I am happy with the road system to hill country
32. There is enough information on hill country areas
33. I am happy with the services in the tea plantations
34. Mass tourism disturbs the nature in Sri Lanka
35. I enjoyed a lot in tea plantation area
36. I would like to visit tea plantations again for holiday

### **Part 3: Visitor Opinions & Suggestions**

37. Before coming to Sri Lanka were you aware of the possibilities for visiting tea plantations? Yes  No

38. If Yes, where did you get the information about the visiting of tea plantation?

*(Multiple choice question)*

i. Travel agents and Tour Operators in my country  ii.

Newspapers & Magazines

ii.iii. TV  iv. Internet  v. Information at the airport

vi. Hotels  vi. Travel agents & tour operators in Sri Lanka

vi. Other (please specify):

.....

39. Have you heard about “Ceylon tea” earlier? Yes

No

40. If you heard about “Ceylon tea” earlier, how did you new about that? *(Multiple choice question)*

i. TV  ii. News papers & Magazines  iii.

Internet

iv. Friends & relatives  v. Travel agents & tour operators

41. Have you tasted the “Ceylon tea” earlier? Yes

No

If Yes,

42. Which categories of “Ceylon tea” do you like drinking?

i. Black tea  ii. Green tea  iii. CTC tea

iv. Orthodox tea  v. Other (please specify):

.....

43. How do you rate the “Ceylon tea”?

Strongly Agree Not Sure

Disagree Strongly

| disagree  | agree                    |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| i. It has a unique taste                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          |                          |                          |                          |                          |
| ii. It has a strong taste                         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          |                          |                          |                          |                          |
| iii. Can be recommend as a best tea ever seen     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> <input type="checkbox"/> |                          |                          |                          |                          |
| iv. It is my favorite tea                         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          |                          |                          |                          |                          |

44. How do you rate your overall holiday experience in Sri Lanka?

|   |   |
|---|---|
| i. Beyond expectations <input type="checkbox"/> | ii. Good <input type="checkbox"/>           |
| ii. Satisfactory <input type="checkbox"/>       | iv. Unsatisfactory <input type="checkbox"/> |

45. If your overall holiday experience in Sri Lanka is unsatisfactory, please kindly give reasons for that?

.....

.....

.....

46. Do you think that agro-tourism in Sri Lanka has been developed? Yes  No

If No, what kind of suggestions you can make to develop agro-tourism in Sri Lanka?

.....

.....

.....

47. Do you think that tea-tourism in Sri Lanka has been developed? Yes  No

If No, what kind of suggestions you can make to develop tea-tourism in Sri Lanka?

48. What are the most important factors you consider when selecting a travel designation? **(Please indicate your level of consideration by 11: Most important to 1: least important in the given space for each activities)**





53. Age: i. Less than 20  ii. 21-30  iii. 31-40   
 iv. 41-50  v. 51-60  vi. Over 60 years old
54. Highest Education level: i. Primary or less  ii. Secondary   
 iii. Diploma  iv. Bachelor   
 v. Post Graduate
55. Occupation: i. Self employed  ii. Govt. Employee   
 iii. Private Employee  iv. Professional   
 v. Retired  vi. Scientists   
 vii. Executives  viii. Educationalist   
 ix. Business  x. No occupation   
 xi. Technical  xii. Other (please specify): .....
56. Have you visited Sri Lanka before? Yes   
 No   
 If Yes, how many times have you visited?.....
57. With whom you are traveling on this trip?  
 i. Alone  ii. With spouse only   
 iii. With relatives and/or friends  iv. With spouse & children   
 v. Other (please specify):  
 .....

58. What is your monthly income?

i. Less than 500 US\$

US\$

iii 1,000 US\$ - 1500 US\$

2,000 US\$

v. 2,500 US\$ - 3000 US\$

US\$

ii. 500 US\$- 1,000

iv. 1,500 US\$-

vi. More than 3,000

**-----Happy Journey & Back to Home-----**



- iv. 41-50  v. 51-60  vi. Over 60 years old
3. Education level: i. None  ii. up to year 5   
 iii. year 5 to 10  iv. G.C.O. (O/L)  v. G.C.E (A/L)   
 vi. Degree & similar  vii. Post graduate degree
4. Are you employed? i. Yes  ii. No ; If No go to question No. 6  
 If Yes, (a). What is your primary occupation?  
 (b). Who is your employer?.....
5. Do you have secondary source of income? i. Yes   
 ii. No   
 If Yes, please state:  
 .....  
 ..  
 .....
6. How much is your household income per month (primary secondary and other) which is tourism related?  
 Rs.....
7. How much is your household income per month (primary secondary and other) which is agriculture related (with tea)?  
 Rs: .....
8. How much is your household income per month (primary secondary and other) which is tea related?  
 Rs.....
9. How much is your household income per month (including all)?.....
10. Is this income sufficient to support the family?  
 i. Sufficient  ii. Moderately sufficient   
 iii. Insufficient
11. How many members are there in your household (including you)?.....

- i. How many are employed?.....
- ii. How many household members working in the:  
Agriculture (excluding tea).....  
Tea.....
- iii. How many household members working in the  
tourism related industry?.....
12. Since how long you are living in this area?
- i. Less than 2 years     ii. 2 to 5 years     iii. 5 to 10  
years
- iv. 10 to 15 years     v. More than 15 years
- vi. Living here since my birth

## Part 2: Community Awareness on Agro-tourism

13. Do you know about what agro-tourism is?
- i. Do not know     ii. Fair knowledge     iii. Yes,  
I know
14. How do you respond according to the scales given below of  
the following statements?  
(Please mark (√) only one box for each question)
- |  | Strongly<br>Disagree     | Strongly<br>agree        | Agree                    | Not Sure                 |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| i. I like to know/learn more about agro-tourism            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ii. I like to know/learn about tea-tourism                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| iii. I like to be a partner in the tea-tourism             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| iv. I feel tea-tourism is suitable for us                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| v. I like if more tourists visiting to see tea plantations | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## Part 3: Socio & Cultural aspects of tea-tourism

15. How do you respond according of the scales given below to  
the following statements?

(Please mark (√) only one box for each question)

|   | Strongly<br>Disagree     | Strongly<br>agree        | Agree                    | Not Sure                 |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| i. Social life get benefits from tea-tourism  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ii. Exposure to other cultures and languages  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| iii. Tourism creates social problems like   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| iv. Criminality, alcoholism and drugs   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| v. Visiting of too many visitors damage rural life style of the community           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| vi. Tourists can see way of life of the people in the tea plantations               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| vii. People are motivated to learn English through tourism development in this area | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

#### Part 4: Environmental aspects of tea-tourism

16. How do you respond according of the scales given bellow to the following statements?

(Please mark (√) only one box for each question)

|   | Strongly<br>Disagree     | Strongly<br>agree        | Agree                    | Not Sure                 |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| i. Tea-tourism creates natural greenery       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ii. Tea-tourism helps to protect soil erosion | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| iii. Urbanization damage the areas' beauty    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

iv. Tea-tourism helps to protect our natural     
  environment

ii. This creates improvements of road system     
   
 and other facilities in tea plantation areas

### 17. Part 5: judgments of the community on economic impact of tea-tourism

|  | Strongly<br>Disagree                              | Agree   | Not Sure                 |
|--|---|---|--------------------------|
|  | Strongly<br>disagree                              | agree   |                          |
| i. Tea-tourism create more income to people<br><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>                                  | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> |
| ii. Reduce or reverse migration of labour<br><input type="checkbox"/> <input type="checkbox"/>   | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> |
| iii. Tourism can create more jobs to our area in future<br><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>                      | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> |
| iv. There is no disruption by the community<br><input type="checkbox"/> <input type="checkbox"/><br>for future tourism development                         | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> |
| v. The village has a good community connection<br><input type="checkbox"/> <input type="checkbox"/>  | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> |
| vi. Tourism helps to improve infrastructure<br><input type="checkbox"/> <input type="checkbox"/><br>in our area  | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> |
| vii. Due to tourism, land value will higher<br><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/><br>than other areas              | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> |
| viii. Tourism can act as a generator of<br><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/><br>community development in the area | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> |
| ix. Terrorism is threat to develop tea-tourism<br><input type="checkbox"/> <input type="checkbox"/>  | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> |
| x. Plantation companies can play major role<br><input type="checkbox"/> <input type="checkbox"/><br>to develop tea-tourism                                 | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> <input type="checkbox"/> | <input type="checkbox"/> |

- xi. Tea smallholders organization can play a     
   
major role to develop tea-tourism
- xii. Tourism creates more small business
- xiii. opportunities in our area developing this
- xiv. Tourism can creates many variety of    
    
tourism products in our area
- xv. Big companies get most tourism benefits     
  and creates less benefits for us
- xvi. We have excellent potential to develop
- xvii. Tea-tourism
- xviii. I like the development of this area     
   
as a tourist destination

18. What you can offer to the tourists, if they come to your area to see tea plantations? (*Multiple choice question*)

- i. Take them to tea trekking
- ii. Take them to see beautiful tea landscapes
- iii. Take then to see tea factories
- iv. Take them to see how tea plucking by peoples
- xix. Take them to experience the life style of the people's living in tea plantations
- vi. Providing of home stay for tourists
- vii. Selling of tea products
- viii. Selling of souvenirs to the tourists



19. How do you feel to improve this tea-tourism in this area?

What has to be done?

- i. Do promotion in abroad
- ii. Highways to be built from airport and other destination to hill country
- iii Introduce and upgrade railway transport system
- iv. Construction of luxury hotels
- v. More government involvement for tea-tourism
- vi. Stakeholder cooperation
- xx. Infrastructure & facility development

20. Do you have any suggestions or recommendations on the future development of tea-tourism in Sri Lanka?

.....  
.....  
.....

APPENDIX C

**QUESTIONNAIRE FOR TOURISM RELATED  
RESOURCE MANAGING ORGANIZATIONS IN THE  
PUBLIC SECTOR**

Interviewer: ..... Date 

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| d | d | m | m | y | y |
|   |   |   |   |   |   |

  
Sample



**Survey on Agro-Tourism in Sri Lanka: A Case Study of the  
Tea Industry**

---

The aim of this survey is to collect data and information for a thesis for the International Master of Business Administration (MBA) program at the Faculty of Hospitality and Tourism, Prince of Songkla University, Phuket Campus, Thailand. The information collected with this questionnaire will be used only for academic purposes and kept confidential. Your kind cooperation in this regard is highly appreciated.

Indrajith De Silva-Researcher  
Sri Lanka Tourism Promotion Bureau

**Agro- tourism is “Travel that combines agricultural or rural settings and products within a tourism experience”**

**Part 1: Organizational characteristics to the tourism sector**

1. Name of the organization?.....  
 .....  
 .....  
 .....

2. What are the objective/objectives of your organization in brief?

- i. ....  
.....  
.....
- ii. ....  
.....  
.....
- iii. ....  
.....  
.....
- iv. ....  
.....  
.....

3. What is the Mission /Vision of your organization?

Mission:

.....  
.....  
.....  
.....

Vision:

.....  
.....  
.....  
.....

4. What are the policies and guidelines formulated in relation to the tea-tourism sector, if any?

.....  
.....  
.....  
.....

**Part 2: Tea-tourism in the Tourism Sector**

5. What type of support and measures your organization contributes to tea-tourism?

- i. High
- ii. Moderate
- iii. Low
- iv. Nil

6. What kind problems that you have to face when developing tea-tourism in the country?

.....  
.....  
.....

7. What is your organization’s view of promoting tea-tourism?

.....  
.....  
.....

8. What are the factors you suggest that is necessary to incorporate tea-tourism into the overall tourism strategy for Sri Lanka rather than having the tea and tourism in isolation?

.....  
.....  
.....

9. What are the challenges that the government sees in promoting this as a special tourism product?

.....  
.....  
.....

10. What are the potential new areas that can be develop tea-tourism?

.....  
.....  
.....

11. What value addition methods can be introduced to make it an attractive product for tea and tourism industry?

.....  
.....  
.....

12. To promote tea-tourism as a special market segment what developments do you consider necessary?

.....  
.....  
.....

13. In developing tea-tourism as a special market segment how does the government plan to benefit the local communities and what measures will be proposed?

.....  
.....  
.....

14. What kind of mechanism you suggest to give the maximum benefits to the local community in developing tea-tourism?

.....  
.....  
.....

**Part 3: Community & Stakeholder Partnership**

15. What kind of coordination mechanism and the stakeholder involvements does the government feel is necessary to build up to develop the tea and tourism sector?

.....  
.....  
.....  
.....

16. What kind of government & private sector partnership will be proposed to develop this tea-tourism?

.....  
.....  
.....  
.....

17. What are the organizations you think required to work together with your organization?

- |                                |                          |                           |
|--------------------------------|--------------------------|---------------------------|
| i. Ministry of Tourism         | <input type="checkbox"/> | ii. Tourist Board         |
|                                | <input type="checkbox"/> |                           |
| iii. Tea Board                 | <input type="checkbox"/> | iv. TSHDA                 |
|                                | <input type="checkbox"/> |                           |
| iv. CEA                        | <input type="checkbox"/> | v. Ministry of Plantation |
| Industries                     | <input type="checkbox"/> |                           |
| vi. Planters Association       | <input type="checkbox"/> | v. Provincial Councils    |
|                                | <input type="checkbox"/> |                           |
| vi. RDA                        | <input type="checkbox"/> | vii. NGOs                 |
|                                | <input type="checkbox"/> |                           |
| viii. CBO of tea stallholder's | <input type="checkbox"/> | x. Electricity Board      |
|                                | <input type="checkbox"/> |                           |
| xi. Water Board                | <input type="checkbox"/> | xii. Plantation companies |
|                                | <input type="checkbox"/> |                           |
| xiii. TRI                      | <input type="checkbox"/> | xiv. Agriculture Dept.    |
|                                | <input type="checkbox"/> |                           |
| xv. Environment concern NGOs   | <input type="checkbox"/> | xvi. Municipalities       |
|                                | <input type="checkbox"/> |                           |
| xvii. Other (please specify):  |                          |                           |
| .....                          |                          |                           |

18. What is your role of working together with the other stakeholders related to tea-tourism?

.....

.....

.....

.....

**Part 4: Recommendations & Suggestions**

19. What strengths does Sri Lanka have for development of tea-tourism?

.....  
.....  
.....  
.....  
.....

20. What opportunities are available in Sri Lanka to develop tea-tourism?

.....  
.....  
.....  
.....

21. Please describe any weaknesses when promoting tea-tourism in the current scenario?

.....  
.....  
.....  
.....

22. Please describe any barriers, problems, resistant factors, etc. which affects the development of tea-tourism in Sri Lanka.

.....  
.....  
.....  
.....

23. Finally, please describe how you suggest to overcome the above barriers and problems to develop Sri Lanka as a tea-tourism destination

.....  
.....  
.....  
.....

-----**Thanks for your contribution**-----

**APPENDIX D**  
**QUESTIONNAIRE FOR RESEARCHERS AND**  
**SCHOLARS**

Stakeholder Category: .....  
 No:.....

Sample



**Survey on Agro-Tourism in Sri Lanka: A Case Study of the**  
**Tea Industry**  
**Questionnaire for Researchers & Scholars**

---

The aim of this survey is to collect data and information for a thesis for the International Master of Business Administration (MBA) program at the Faculty of Hospitality and Tourism, Prince of Songkla University, Phuket Campus, Thailand. The information collected with this questionnaire will be used only for academic purposes and kept confidential. Your kind cooperation in this regard is highly appreciated.

Indrajith De Silva-Researcher  
 Sri Lanka Tourism Promotion Bureau

**Agro-tourism is “Travel that combines agricultural or rural settings and products within a tourism experience”**

**Part 1: Involvement in tea-tourism**

1. Kindly mentioned your capacity of involvement in tea-tourism? **(Multiple choice question)**

- i. Researcher       ii. Scholar       iii. Trainer   
 iv. Educator       v. Advisor       vi. Planner





8. In the view of **marketing and promotion perspectives**, what kind of improvement you would like to suggest?.....  
 .....  
 .....  
 .....

9. In your point of view do you have any experience or knowledge about the good practices done by other countries in agro-tourism or tea-tourism? Yes  No

10. If Yes, please kindly state the countries for best practices in this area?  
 .....  
 .....  
 .....  
 .....

11. In your opinion, please mention the areas having high potential that can be develop tea-tourism in Sri Lanka?  
 i. .... ii.  
 .....  
 iii. .... iv.  
 .....  
 v. .... vi.  
 .....

**Part 2: Product Development in Tea-tourism**

12. How do you feel that the related tourism products exiting in tea-tourism sector are good enough to attract tourists in relation with the tea-tourism sector?  
 i. Strongly enough  ii. Enough  iii.  
 Moderately enough  iv. Not enough  v.  
 No idea

13. If it is not enough, what suggestions you can mention on product development? (*Multiple choice question*)
- i. Identify new tourism products cater to tea-tourism
  - ii. Study to be done on tourism products
  - iii. Upgrade existing products suite to the tea-tourism
  - iv. Other (please specify):  
.....
14. How do you assess the current existing services and facilities in the tea-tourism sector in Sri Lanka?
- i. Excellent
  - ii. Good
  - iii. Poor
  - iv. Very poor
  - v. No idea
15. How do you feel to improve this tea-tourism in this area? What has to be done?
- i. Required marketing & promotion in abroad
  - ii. Construction of luxury hotels
  - iii. Highways to be built from airport and other destination to hill country
  - iv. Introduce and upgrade railway transport system
  - v. More government involvement for tea-tourism
  - vi. Stakeholder cooperation
  - vii. Infrastructure & facility development
  - viii. Concessionary loan scheme with low interest rates for tourism related stakeholder's
  - ix. Other (please specify):  
.....
16. What type of activities, facilities and services you suggest to offer for the tea-tourists positioning Sri Lanka as a tea-tourism destination?

**Activities:**

|      |      |
|------|------|
| i.   | v.   |
| ii.  | vi.  |
| iii. | vii. |



21. What kind of government and private sector partnership will be proposed to develop tea-tourism sector?

.....  
 .....  
 .....

22. What are the most essential organizations should closely work together from the above list to development of tea-tourism?

*(Please state your priority by 1: for highest to lowest)*

- |                                |                          |                                      |                          |
|--------------------------------|--------------------------|--------------------------------------|--------------------------|
| i. Ministry of Tourism         | <input type="checkbox"/> | ii. Tourist Board                    | <input type="checkbox"/> |
| iii. Sri Lanka Tea Board       | <input type="checkbox"/> | iv. TSHDA                            |                          |
|                                | <input type="checkbox"/> |                                      |                          |
| iv. CEA                        | <input type="checkbox"/> | v. Ministry of Plantation Industries | <input type="checkbox"/> |
| vi. Planters Association       | <input type="checkbox"/> | v. Provincial Councils               |                          |
|                                | <input type="checkbox"/> |                                      |                          |
| vi. RDA                        | <input type="checkbox"/> | vii. NGOs                            |                          |
|                                | <input type="checkbox"/> |                                      |                          |
| viii. CBO of tea stallholder's | <input type="checkbox"/> | x. Electricity Board                 |                          |
|                                | <input type="checkbox"/> |                                      |                          |
| xi. Water Board                | <input type="checkbox"/> | xii. Plantation companies            |                          |
|                                | <input type="checkbox"/> |                                      |                          |
| xiii. TRI Dept.                | <input type="checkbox"/> | xiv. Agriculture                     |                          |
| xv. Environment concern NGOs   | <input type="checkbox"/> | xvi. Municipalities                  |                          |
|                                | <input type="checkbox"/> |                                      |                          |
| xvii. Development Banks        | <input type="checkbox"/> | xviii. Other                         |                          |
| (please specify): .....        |                          |                                      |                          |

23. What role government organization such as Ministry of Tourism & Tourist Board should play to development of tea-tourism in Sri Lanka? *(Please indicate as first priority and second priority)*

.....  
.....  
.....

24. What role government organization such as Sri Lanka Tea Board, TSHDA, and Agriculture Department should play to development of tea-tourism in Sri Lanka? *(Please indicate as first priority and second priority)*

.....  
.....  
.....

25. What role private sector stakeholders such as tourism & hospitality industry, plantation industry and other stakeholders in this area should play to development of tea-tourism in Sri Lanka? *(Please indicate as first priority and second priority)*

.....  
.....  
.....

26. What role local community in the plantation sector, community based organizations (CBOs), NGOs, unions of the tea plantation sector should play to development of tea-tourism in Sri Lanka? *(Please indicate as first priority and second priority)*

.....  
.....  
.....

27. What role of Political leadership in the tea plantation sector areas and also political leaderships responsible for the tea and tourism sector should play to development of tea-tourism in Sri Lanka? *(Please indicate as first priority and second priority)*

.....  
.....  
.....  
.....

**Part 4: Recommendations & Suggestions**

28. What are the factors you suggest that is necessary o  
incorporate tea-tourism into the overall tourism strategy for  
Sri Lanka rather than letting the tea and tourism in isolation?

.....  
.....  
.....  
.....

29. What strengths does Sri Lanka have to develop tea-tourism?

.....  
.....  
.....  
.....

30. What opportunities are available in Sri Lanka to develop tea-  
tourism in Sri Lanka?

.....  
.....  
.....  
.....

31. Please describe any if barriers, problems of some resistant  
factors which affects to development of tea-tourism in Sri  
Lanka?

.....  
.....  
.....  
.....

32. What challenges Sri Lanka has to face on the development of tea-tourism?

.....  
.....  
.....  
.....

33. Finally, please describe how you suggest to overcome the above barriers and problems to buildup Sri Lanka as a tea-tourism destination.

.....  
.....  
.....  
.....

**-----Thanks for your contribution-----**



**APPENDIX E**  
**QUESTIONNAIRE FOR SERVICE PROVIDER -**  
**TOURISM SECTOR**

d d m m y y

Date 

|  |  |  |  |  |  |
|--|--|--|--|--|--|
|  |  |  |  |  |  |
|--|--|--|--|--|--|

Stakeholder Sub Category: .....

Sample

Stakeholder Category: .....



**Survey on Agro-Tourism in Sri Lanka: A Case Study of the**  
**Tea Industry**

---

The aim of this survey is to collect data and information for a thesis for the International Master of Business Administration (MBA) program at the Faculty of Hospitality and Tourism, Prince of Songkla University, Phuket Campus, Thailand. The information collected with this questionnaire will be used only for academic purposes and kept confidential. Your kind cooperation in this regard is highly appreciated.

Indrajith De Silva-Researcher  
 Sri Lanka Tourism Promotion Bureau

**Agro- tourism is “Travel that combines agricultural or rural settings and products (tea & other agro products) within a tourism experience”**

**Part 1: Service / Facilities Characteristics**

Name of your company:.....

.....

1. What types of services you provide to tourists? (**Multiple choice question**)

- i. Tour Operator       ii. Travel Agent       iii. Accommodation
- iv. Vehicle Rental       v. Restaurant       vi. Tour Guide
- vii. Tourist Shops       viii. Other (please specify):

.....

2. How many years have you been in this service? No. of years:

.....

How many employees are working in your company?.....

## **Part 2: Tea-tourism Market and Potential Characteristics**

3. Averagely how many international tourists receive / get your services per month?

High season: ..... Low season:

.....

4. What percent of them (International tourists) are visiting to the tea plantation areas?

- i. 10% or less       ii. 10% - 20%       iii. 20%-30%
- iv. 30%-40%       v. 40%-50%       vi. 50%-60%
- vii. 60%-70%       viii. 70%-80%       ix. 80%-90%
- x. 90%-100%       xi. None       xii. Not sure

5. Please state the main market areas (countries) of tourists visiting to get your services?

| Main countries | Market Share (%) |
|----------------|------------------|
| .....          | .....            |

|       |       |
|-------|-------|
| ..... | ..... |
| ..... | ..... |
| ..... | ..... |
| ..... | ..... |
| Total | 100%  |

6. Averagely how many domestic tourists receive / get your services per moth?

High season: ..... Low season:  
 .....

7. Do you have any idea about what percent of them (Domestic tourists) are visiting to the tea plantation areas?

- i. 10% or less
- ii. 10% - 20%
- iii. 20%-30%
- iv. 30%-40%
- v. 40%-50%
- vi. 50%-60%
- vii. 60%-70%
- viii. 70%-80%
- ix. 80%-90%
- x. 90%-100%
- xi. None
- xii. Not sure

8. Do you know about what agro-tourism is?

- i. Do not know
- ii. Fair knowledge
- iii. Yes, I know

9. Do you know about what tea-tourism is?

- i. Do not know
- ii. Fair knowledge
- iii. Yes, I know

10. How do you respond according to the scales given bellow of the following statements?

(Please mark (√) only one box for each question)

|  |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|
|  | Strongly                 | Agree                    | Not Sure                 |
| <b>Disagree Strongly</b>                         |                          |                          |                          |
| <b>disagree</b>                                  | <b>agree</b>             |                          |                          |
| i. There is a substantial market for tea-tourism | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|  | <input type="checkbox"/> | <input type="checkbox"/> |                          |

- ii. Our tea plantations have a unique quality     
   
to attract tourists
- iii. Marketing & promotions campaigns    
    
doing by Sri Lanka is satisfactory to attract more  
tourists to tea-tourism sector
- iv. We have many attractions to draw more     
   
tourists to tea-tourism
- v. Tea-tourism is the best segment to develop     
   
tea plantation areas
- vi. Tea-tourism is not developed in Sri Lanka
- vii. Tea plantation sector has no awareness    
    
on tea-tourism
- viii. Tea-tourism is a new market for us
- ix. Formulation of government policy on
- x. Tea-tourism can highly impact on the      
  
development of tea-tourism
- xi. We can promote Sri Lanka as a tea-tourism
- xii. Destination in the tourism sector
- xiii. International promotion on tea help to     
   
promote tea-tourism in Sri Lanka
- xiv. International & local marketing campaign    
    
is needed to develop tea-tourism

11. How do you assess the market potential for tea-tourism?

- i. Very high                       ii. Average                       iii. Very low  
                      iv. Nil

12. What are the potential market areas (tourist destinations) you suggest to develop Sri Lanka as a tea-tourism destination and please rating them according to the level of potential? **Please mentioned appropriate rating in front of the destination 3: Highly potential, 2: potential, 1: Potential but not much**

- i. USA .....                      ii. UK .....
- iii. New Zealand .....                      iv. Canada .....
- v. Scandinavian countries .....                      vi. Australia  
.....
- vii. Germany .....                      viii. Japan .....
- ix. France .....                      x. Other (please  
specify): .....

### Part 3: Product Development in Tea-tourism

13. How do you respond according to the scales given bellow of the following statements?

(Please mark (√) only one box for each question)

- |   | Strongly<br>Disagree     | Strongly<br>agree        | Agree                    | Not Sure                 |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| i. Related tourism product to be develop<br><input type="checkbox"/> <input type="checkbox"/><br>before promote tea-tourism                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ii. New tour packages to be introduced and<br><input type="checkbox"/> <input type="checkbox"/><br>develop existing packages on tea-tourism | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| iii. Many agro products available in the tea<br><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |



xiv. Spa service

xv. Attractive tour packages

xvi. Electricity

15. In your opinion, please mention the areas having high potential that can be develop tea-tourism?

i. .... ii.  
.....

iii. .... iv.  
.....

v. .... vi.  
.....

16. How do you feel that how important the area selected by you for improvement on tea-tourism.? What has to be done?

**(Multiple choice question)**

3(High) ← ——— Important Level(2 Medium) ———→  
(Low) 1

(Please mark in the appropriate box)

| Area of improvement   | (Y/N)           |   |   |   |
|---|-----------------|---|---|---|
|   | Required or not | 3 | 2 | 1 |
| i. Required marketing & promotion in abroad                                   |                 |   |   |   |
| ii. Construction of luxury hotels   |                 |   |   |   |
| iii. Introduced home stays in the tea plantations or suborn area              |                 |   |   |   |
| iv. Introduced Agro parks or theme parks                                      |                 |   |   |   |
| v. Create more activities on tea-tourism                                      |                 |   |   |   |
| vi. More entertainment facilities   |                 |   |   |   |
| vii. Get support from experts on tea-tourism                                  |                 |   |   |   |
| viii. Highways to be built from airport and other destination to hill country |                 |   |   |   |
| ix. Introduce and upgrade railway transport system                            |                 |   |   |   |
| x. More government involvement for tea-tourism                                |                 |   |   |   |
| xi. Stakeholder cooperation   |                 |   |   |   |

|  |  |  |  |  |
|--|--|--|--|--|
| xii. Introducing new tour packages on tea-tourism  |  |  |  |  |
| xiii. Infrastructure & facility development  |  |  |  |  |
| xiv. Introduce “Ceylon tea centers” couple with other related activities in the tourist destinations |  |  |  |  |

**Part 3: Cooperation and Collaboration in tea-tourism**

17. Please evaluate how your organization contributes to tea-tourism industry?

- i. High
- ii. Moderate
- iii. Low

18. There are many stakeholders in the tea-tourism. How do you think that working together with all stakeholders is better option to develop this market segment?

- i. Significantly
- ii. To some extent
- iii. No
- iv. Not sure

19. Please describe the reasons for the answer belongs to the question no. 19 (reasons for cooperation with the stakeholders is better or/not better)

.....

.....

.....

.....

.....

..

20. What are the organizations you think should work together with your organization?

- i. Ministry of Tourism
- ii. Tourist Board
- iii. Sri Lanka Tea Board
- iv. TSHDA



- v. CEA Industries
- vi. Ministry of Plantation
- vii. Planters Association
- viii. Provincial Councils
- ix. RDA
- x. NGOs
- xi. CBO of tea stallholder's
- xii. Electricity Board
- xiii. Water Board companies
- xiv. Plantation
- xv. TRI
- xvi. Agriculture Dept.
- xvii. Environment concern NGOs
- xviii. Municipalities
- xix. Development Banks
- xx. Other (please specify): .....

21. What value addition methods can be introduced to make tea-tourism a more attractive product for tea and tourism industry?

.....

.....

.....

.....

.....

.....

22. To promote tea-tourism as a special market segment what developments do you consider necessary?

.....

.....

.....

.....

23. What kind of contribution you expect from the Plantation sector stakeholders to develop tea-tourism?

.....

.....

.....

.....

24. What kind of contribution you expect from the Government sector stakeholders? (*Multiple choice question*)

- i. Loan scheme with low interest
- ii. Some incentives related to this sector
- iii. Institutional support
- iv. Awareness training of best practices of other countries
- v. Expertise support on tea-tourism
- vi. Other (please specify):

.....

**Part 4: Recommendations & Suggestions**

25. What strengths does Sri Lanka have for development of tea-tourism?

.....  
 .....  
 .....

26. What opportunities are available in Sri Lanka to develop tea-tourism?

.....  
 .....  
 .....

27. Please describe any weaknesses when promoting tea-tourism in the current scenario?

.....  
 .....  
 .....

28. Please describe any barriers, problems, resistant factors, etc. which affects the development of tea-tourism in Sri Lanka.

.....  
 .....

.....  
.....

29. Finally, please describe how you suggest to overcome the above barriers and problems to develop Sri Lanka as a tea-tourism destination.

.....  
.....  
.....  
.....  
.....  
.....

**-----Thanks for your contribution-----**

**APPENDIX F**  
**QUESTIONNAIRE FOR PLANTATION SECTOR**  
**SERVICE PROVIDERS**

|       |   |   |   |   |   |   |
|-------|---|---|---|---|---|---|
| Date  | d | d | m | m | y | y |
| ..... |   |   |   |   |   |   |

Stakeholder Category: .....

Sample

Stakeholder Category: .....



**Survey on Agro-Tourism in Sri Lanka: A Case Study of the**  
**Tea Industry**

The aim of this survey is to collect data and information for a thesis for the International Master of Business Administration (MBA) program at the Faculty of Hospitality and Tourism, Prince of Songkla University, Phuket Campus, Thailand. The information collected with this questionnaire will be used only for academic purposes and kept confidential. Your kind cooperation in this regard is highly appreciated.

Indrajith De Silva-Researcher  
 Sri Lanka Tourism Promotion Bureau

**Agro tourism is “Travel that combines agricultural or rural settings and products within a tourism experience”**

**Part 1: Service / Facilities Characteristics**

1. Name of your  
 company:.....  
 .....  
 .....  
 .....



- v. Trekking in tea plantations       vi. Tasting Ceylon Tea
- vii. Seeing tea plucking & tea processing       viii. Exploring and learning
- xi. Exploring rural life style       xii. Cycling
- xiii. Other (please specify):  
.....

8. How do you assess the market potential for tea-tourism ?  
 i. Very high       ii. Average       iii. Very low       iv. Nil

9. What are the high potential areas you suggest for development of tea-tourism?  
 (Mention the places having highest potential in the following table)

|     |     |     |
|-----|-----|-----|
| i.  | v.  | x.  |
| ii. | vi. | xi. |
|     |     |     |

10. How do you respond according to the scales given bellow of the following statements?

(Please mark (√) only one box for each question)

|  | Strongly disagree        | Agree                    | Not Sure                 | Strongly agree           |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| i. There is a substantial market for tea-tourism                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ii. Our tea plantations have a unique attraction to attract tourists | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- iii. Marketing & promotions campaigns doing     
   
by SL is satisfactory to attract more  
tourists to tea-tourism sector
- iv. We have many attractions to draw more     
   
tourists to tea-tourism
- v. Tea-tourism is the best segment to develop
- vi. Tea plantation areas
- vii. Tea-tourism is not developed in Sri Lanka
- viii. Tea-tourism is a new market for us
- ix. Formulation of government policy on     
  tea-tourism can highly impact on the  
development of tea-tourism
- x. We can promote SL as a tea-tourism      
  
destination in the tourism sector
- xi. International promotion on tea help to      
  
promote tea-tourism in Sri Lanka
- xii. International & local marketing campaign    
    
on tea-tourism is needed to develop

11. Does your company have any agreement with travel related companies?

Yes  No

If yes, please describe the nature of business?.....

### Part 3: Product Development in Tea-tourism

12. How do you rate the following services available at present for development of tea-tourism?

|   | Excellent                | Good                     | Satisfactory             | Sure                     |                          |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Available   | Not                      | Not                      |                          |                          |                          |
| Unsatisfactory                                    |                          |                          |                          |                          |                          |
| i. Accommodation/lodging                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          |                          |                          |                          |                          |                          |
| ii. Infrastructure                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          |                          |                          |                          |                          |                          |
| iii. Water supply & sanitation                    |                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> <input type="checkbox"/> |                          |                          |                          |                          |                          |
| iv. Restaurants                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| v. Transportation                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          |                          |                          |                          |                          |                          |
| vi. Security & safety                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          |                          |                          |                          |                          |                          |
| vii. Tourist shops                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          |                          |                          |                          |                          |                          |
| viii. Souvenirs                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ix. Tourist information centers                   |                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> <input type="checkbox"/> |                          |                          |                          |                          |                          |
| x. Tourist police posts                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          |                          |                          |                          |                          |                          |
| xi. Tourist guides                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          |                          |                          |                          |                          |                          |
| xii. Range of foods                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          |                          |                          |                          |                          |                          |
| xiii. Entertainment                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          |                          |                          |                          |                          |                          |
| xiv. Spa service                                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          |                          |                          |                          |                          |                          |



- xv. Tour packages
- 
- xvi. Safety & security
- 
- xvii. Electricity
- 

13. How do you feel that how important the area selected by you for improvement on tea-tourism.? What has to be done?

**(Multiple choice question)**

3(High) ←———— Important Level (2 Medium) —————→

1 (Low)

(Please mark in the appropriate box)

| Area of improvement   | (Y/N)           |   |   |   |
|---|-----------------|---|---|---|
|   | Required or not | 3 | 2 | 1 |
| i. Required marketing & promotion in abroad                                   |                 |   |   |   |
| ii. Construction of luxury hotels   |                 |   |   |   |
| iii. Introduced home stays in the tea plantations or suborn area              |                 |   |   |   |
| iv. Introduced Agro parks or theme parks                                      |                 |   |   |   |
| v. Create more activities on tea-tourism                                      |                 |   |   |   |
| vi. More entertainment facilities   |                 |   |   |   |
| vii. Get support from experts on tea-tourism                                  |                 |   |   |   |
| viii. Highways to be built from airport and other destination to hill country |                 |   |   |   |
| ix. Introduce and upgrade railway transport system                            |                 |   |   |   |

|  |  |  |  |  |
|--|--|--|--|--|
| x. More government involvement for tea-tourism   |  |  |  |  |
| xi. Stakeholder cooperation  |  |  |  |  |
| xii. Introducing new tour packages on tea-tourism  |  |  |  |  |
| xiii. Infrastructure & facility development  |  |  |  |  |
| xiv. Introduce “Ceylon tea centers” couple with other related activities in the tourist destinations |  |  |  |  |

14. What type of Activities, Facilities and Services you suggest to provided for positioning Sri Lanka as a tea-tourism destination?

**Activities:**

|      |       |
|------|-------|
| i.   | v.    |
| ii.  | vi.   |
| iii. | vii.  |
| iv.  | viii. |

**Facilities:**

|      |       |
|------|-------|
| i.   | v.    |
| ii.  | vi.   |
| iii. | vii.  |
| iv.  | viii. |

**Services:**

|      |       |
|------|-------|
| i.   | v.    |
| ii.  | vi.   |
| iii. | vii.  |
| iv.  | viii. |

**Part 4: Cooperation and Collaboration in tea-tourism**

15. Please rate the level of how your organization contributes to tea-tourism industry?

- i. High                       ii. Moderate                       iii. Low
-



xix. Development Banks            xx. Other (please specify): .....

19. What value addition methods can be introduced to make it an attractive product for tea and tourism industry?

.....  
.....  
.....  
.....

20. To promote tourism as a special market segment what developments do you consider necessary?

.....  
.....  
.....  
.....  
.....

21. What kind of contribution you expect from the Tourism sector stakeholders to develop tea-tourism?

.....  
.....  
.....  
.....  
.....

22. What kind of contribution you expect from the Plantation sector stakeholders to develop tea-tourism?

.....  
.....  
.....  
.....  
.....

23. What kind of contribution you expect from the Government sector stakeholders?

***(Multiple choice question)***

- i. Loan scheme with low interest
- ii. Some incentives related to this sector
- iii. Institutional support
- iv. Awareness training of best practices of other countries
- v. Expertise support on tea-tourism
- vi. Other (please specify):.....

**Part 5: Recommendations & Suggestions**

24. What strengths does Sri Lanka have for development of tea-tourism?

.....

.....

.....

.....

.....

.....

25. What opportunities are available in Sri Lanka to develop tea-tourism?

.....

.....

.....

.....

.....

.....

26. Please describe any weaknesses when promoting tea-tourism in the current scenario?

.....  
.....  
.....  
.....  
.....  
.....

27. Please describe any barriers, problems, resistant factors, etc. which affects the development of tea-tourism in Sri Lanka

.....  
.....  
.....  
.....  
.....

28. Finally, please describe how you suggest to overcome the above barriers and problems to develop Sri Lanka as a tea-tourism destination.

.....  
.....  
.....

**-----Thanks for your contribution-----**