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Skills for Inclusive Growth



Comprehensive Study of the Sri Lankan Tour Guides

Focusing on Enhancing Skills of Tour Guides

STUDY REPORT

MAY 2024

MESSAGE FROM CHAIRMAN, SLTDA

Sri Lanka Tourism Development Authority is pleased to present this insightful report on the research conducted on tour guides in Sri Lanka. This vital research, made possible through the financial assistance provided by S4IG, represents a significant milestone in our ongoing efforts to enhance the quality and effectiveness of tour guiding services in our country.

Tour guides are the lifeblood of our tourism industry, serving as the first point of contact for many visitors and playing a crucial role in shaping their experiences. This research provides a thorough analysis of the current state of tour guiding in Sri Lanka, highlighting both the strengths and areas where improvements are needed.

The findings and recommendations outlined will be instrumental in guiding our future policies and training programs. Our goal is to ensure that our tour guides not only meet but exceed international standards of excellence, thereby enhancing the overall tourist experience and promoting Sri Lanka as a premier destination.

I extend my deepest gratitude to the Australian Government funded S4IG program for their unwavering support and dedication to this important project. I also wish to thank Survey Research Lanka (Pvt) Ltd for successfully conducting the survey and providing valuable insights. Together, we can continue to elevate the standards of our tourism sector and provide unforgettable experiences to all who visit our beautiful island.



Priantha Fernando

Chairman, Sri Lanka Tourism Development Authority

PREFACE

The dynamic landscape of global tourism necessitates continuous adaptation and improvement, particularly in tour guiding. This research report, titled "Comprehensive Study of the Sri Lankan Tour Guides: Focusing on Enhancing Skills of Tour Guides," delves into the pivotal role of tour guides (TGs) in enriching tourist experiences and advancing the tourism sector in Sri Lanka. As the frontline ambassadors of the tourism industry, TGs play a critical role in shaping visitors' perceptions and experiences, making their professional development essential for the sector's success.

This study is the first of its kind in Sri Lanka. It was initiated by Skills for Inclusive Growth (S4IG), a bilateral program between the governments of Australia and Sri Lanka, and executed by Survey Research Lanka (SRL), in collaboration with the Sri Lanka Tourism Development Authority (SLTDA). Kiwikaha Learning provided essential support throughout the research process. The impetus for this report lies in the collective recognition of the need to elevate the competencies of TGs to meet the expectations of modern travellers.

Our research methodology embraced a mixed research approach to ensure a comprehensive understanding of the current state and future need for tour guiding services for tourists visiting Sri Lanka. We actively involved various industry stakeholders, including TGs, tour operators, industry experts, hoteliers, Micro, Small, and Medium-sized Entrepreneurs (MSMEs), and tourists, to gather diverse insights and practical feedback. This inclusive approach has empowered us to formulate well-rounded and actionable recommendations.

The findings and recommendations presented in this report hold the potential to serve as a strategic guide for enhancing the skills and professionalism of TGs in Sri Lanka. By addressing existing gaps and leveraging identified opportunities, we envision a future where the tour guiding sector is responsive high-quality and instrumental in driving sustainable tourism growth. As we look to the future, we see a tourism sector where TGs are equipped with the knowledge, skills, and recognition necessary to deliver exceptional and memorable travel experiences.

Through this report, we aim to inspire continued investment in the professional development of TGs, ensuring that Sri Lanka remains a premier destination for tourists worldwide. By enhancing the capabilities of TGs, we can enrich the tourist experience, contribute to the local economy, and uphold the cultural heritage and natural beauty that make Sri Lanka a unique and compelling destination.



Stephen Lodziak

Team Lead, Skills for Inclusive Growth

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With the support of the highly involved team mentioned above, this project was generated with original knowledge, outcomes-driven insights, and evidence-based recommendations to upgrade and enhance inclusive and effective tour guiding to ensure sustainable tourism development in Sri Lanka.

Lastly, this comprehensive study is dedicated to all hardworking tour guides and the other value chain actors/contributors in the tourism industry who untiringly strive to showcase Sri Lanka as one of the most sought-after tourist destinations by travellers around the world.

EXECUTIVE SUMMARY

This comprehensive report titled "Comprehensive Study of the Sri Lankan Tour Guides: Focusing on Enhancing Skills of Tour Guides" delves into the pivotal role of Tourist Guides (TGs) in enriching tourist experiences and advancing the tourism sector in Sri Lanka. As the frontline ambassadors of the tourism industry, TGs play a critical role in shaping visitors' perceptions and experiences, making their professional development essential for the sector's success. This study, the first of its kind in Sri Lanka, was initiated by Skills for Inclusive Growth (S4IG), a bilateral program between the governments of Australia and Sri Lanka and executed by Survey Research Lanka (SRL) in collaboration with Sri Lanka Tourism Development Authority (SLTDA).

The research employed a mixed methods approach to ensure a comprehensive understanding of the current and future needs of tour guiding services for tourists visiting Sri Lanka. This approach combined qualitative and quantitative research methods, allowing for a holistic view of the tour-guiding sector. The qualitative component included in-depth interviews and focus group discussions with stakeholders such as TGs, tour operators, industry experts, hoteliers, and Micro, Small and Medium-sized Entrepreneurs (MSMEs). These discussions provided nuanced insights into the everyday challenges and opportunities within the industry. The quantitative component involved structured surveys administered to tourists and TGs, providing statistical data that complemented the qualitative findings. This robust methodology ensured that the research captured a wide range of perspectives, making the recommendations comprehensive and actionable.

Various industry stakeholders played an integral role in the research process. TGs themselves provided firsthand accounts of their experiences, challenges, and aspirations. Their input was crucial in understanding the ground realities of tour guiding in Sri Lanka. Tour operators and travel agencies offered insights into the demand side of the industry, including trends in tourist preferences and expectations. Industry experts and academics contributed their knowledge of best practices and emerging trends in the global tourism sector. Hoteliers and MSMEs, who often interact closely with TGs, shared their perspectives on the collaborative aspects of tourism services. Tourists, as the end-users of tour guiding services, provided valuable feedback on their experiences, preferences, and satisfaction levels. This inclusive approach enriched the research and fostered a sense of ownership among stakeholders, which is essential for the successful implementation of the recommendations.

Key findings of the study highlight the essential skills required for TGs to excel in their roles. Effective communication emerged as a fundamental skill, encompassing fluency in languages and the ability to convey information clearly and engagingly. This includes storytelling techniques that bring historical and cultural sites to life for tourists. Cultural competence is another critical skill, enabling TGs to understand and respect the diverse backgrounds of their clients, which is particularly important in a multicultural tourism landscape like Sri Lanka's. The ability to deliver engaging narratives was also emphasized, as it enhances the overall tourist experience and ensures visitors leave with memorable and positive impressions. These skills significantly influence tourists' perceptions and experiences, directly impacting their satisfaction and the likelihood of recommending Sri Lanka as a destination. High-quality TGs can elevate the tourist experience from merely informative to deeply immersive, enhancing

destination competitiveness. Additionally, well-trained TGs can support sustainable tourism practices by educating tourists about responsible behaviour, conservation efforts, and the cultural significance of sites, which helps preserve the attractions that draw visitors to the country.

The study comprehensively discusses the current/existing pool of TGs in Sri Lanka. This figure represents the total number of TGs who are actively engaged in guiding tourists across the country. The TG workforce comprises individuals with diverse backgrounds, qualifications, and areas of specialization. Some TGs possess extensive knowledge of Sri Lanka's cultural and historical heritage, while others are experts in natural and wildlife tours, adventure activities, or urban excursions. This diversity in expertise allows TGs to cater to a wide range of tourist interests and preferences, enhancing the overall visitor experience. As of November 2022, the SLTDA reported that 4,629 licensed TGs were registered under their authority. This group included 1,798 National Guides, 1,476 Chauffeur Guides, 1,253 Area Guides, and 102 Site Guides. By April 2024, SLTDA's records showed an increase in registered TGs to 4,887, indicating a growth of 258 guides over approximately 16 months. This reflects a five to six percent increase in TGs during this period. The updated distribution includes 1,892 National Guides, 1,552 Chauffeur Guides, 1,339 Area Guides, and 104 Site Guides. The study also presented several estimations for the unlicensed TGs as well. However, the TG sector faces a significant challenge in terms of turnover. Various factors contribute to TGs leaving the profession, including migration to other countries, career changes, retirement, and personal reasons. Migration is a notable factor as many skilled TGs seek better opportunities abroad, leading to a brain drain within the industry. Career changes are also common, with some TGs transitioning to other roles within the tourism sector or moving to entirely different fields. Retirement naturally reduces the number of experienced TGs available, and personal reasons such as health issues or family commitments can also impact the workforce.

Meeting the future demand for TGs requires comprehensive and focused training programs. There is a need to train approximately 3809 National TGs and 2613 Chauffeur TGs to meet the future demand. This highlights the importance of focused training programs to equip TGs with the necessary skills. It discusses the curriculum and training modules necessary to equip TGs with the skills required to deliver high-quality services, including language proficiency, cultural knowledge, communication techniques, and the use of technology in guiding. Furthermore, the chapter explores the role of accreditation and certification in maintaining training standards and ensuring that TGs possess the competencies needed to meet the expectations of modern tourists. The findings and recommendations presented in this report hold the potential to serve as a strategic guide for enhancing the skills and professionalism of TGs in Sri Lanka. By fostering these improvements, the tour guiding sector can become more responsive, high-quality, and instrumental in driving sustainable tourism growth. The report envisions a future where TGs are equipped with the knowledge, skills, and recognition necessary to deliver exceptional and memorable travel experiences, contributing to the local economy and upholding the cultural heritage and natural beauty that make Sri Lanka a unique and compelling destination.

The report identifies several challenges faced by the TG sector in Sri Lanka. One major issue is the prevalence of unlicensed guides, which undermines the industry's professionalism and can lead to inconsistent service quality. Addressing this requires stringent enforcement of licensing regulations and public awareness campaigns to highlight the benefits of hiring licensed guides. Constraints in language proficiency present another challenge, particularly as

the tourist demographic becomes increasingly diverse. TGs need to be proficient in multiple languages to cater to non-English-speaking tourists, which necessitates expanded language training programs. Despite these challenges, the report reveals high tourist satisfaction levels with TG services. It identifies motivations driving individuals to pursue careers in guiding, such as independence, national pride, and a passion for heritage preservation. The study estimates the current size of the TG workforce, evaluates their characteristics, and projects the future demand for TGs in Sri Lanka. It also compares the international guidelines for TG standards with the existing curriculum in Sri Lanka, highlighting areas for improvement.

The study has comprehensively discussed the licensing mechanisms of various countries that have national-level licensing processes, such as France, Italy, Japan, and South Korea, where rigorous training and examinations are required to obtain national licenses. These systems ensure that TGs possess extensive knowledge of local history, culture, and attractions, thereby delivering high-quality experiences to tourists. In contrast, countries like New Zealand and Australia employ decentralized approaches with state-specific regulations or voluntary accreditation programs, fostering flexibility but potentially leading to variations in guide qualifications and service standards. Sri Lanka's distinctive TG licensing framework stands out for its specialized categories tailored to diverse tourism roles, including National Guides, Chauffeur Guides, Area Guides, and Site Guides. This structured approach allows guides to specialize in different tourism aspects, offering visitors tailored experiences. Notably, the integration of Chauffeur Guides, who combine transportation services with guiding expertise, enhances convenience and support throughout travelers' journeys, reflecting a forward-thinking approach to meeting diverse tourist needs. Global practices emphasize centralized or regional licensing systems to standardize qualifications and certifications. However, while innovative in recognizing specialized roles, Sri Lanka's system could benefit from standardizing training and certification processes across all categories to ensure consistency in guide skills and service quality. Opportunities for professional development and specialized training in emerging tourism segments like eco-tourism and cultural tourism could further enhance guide expertise and visitor satisfaction, aligning with global trends toward personalized and authentic travel experiences. The implementation of tourism licensing mechanisms directly influences the economic contribution of tourism to a country's GDP. Countries with well-regulated tourism industries, such as Italy and Greece, demonstrate significant GDP contributions due to enhanced visitor experiences and sustained tourism growth. In contrast, countries without national licensing mechanisms, like Australia and Canada, may experience varying impacts on GDP despite robust local regulations maintaining service standards.

The report proposes a series of strategic recommendations to elevate and professionalize the TG profession in Sri Lanka. These recommendations include refining the licensing framework to incorporate rigorous entrance exams and practical assessments, expanding and enhancing training programs to cover digital literacy and specialized tourism niches, and integrating modules on cultural sensitivity and heritage preservation. By addressing existing gaps and leveraging identified opportunities, stakeholders can better equip TGs to meet the diverse needs of modern tourists, capitalize on emerging technological trends, and contribute effectively to sustainable tourism development goals.

Furthermore, the report emphasizes the importance of continuous professional development (CPD) for TGs, suggesting implementing structured CPD programs to ensure that TGs remain updated with the latest industry trends and best practices. It also advocates for establishing a

robust monitoring and evaluation system to assess the impact of training programs and identify areas for further improvement.

The findings and recommendations presented in this report hold the potential to serve as a strategic guide for enhancing the skills and professionalism of TGs in Sri Lanka. By fostering these improvements, the tour guiding sector can become more responsive, high-quality, and instrumental in driving sustainable tourism growth. The report envisions a future where TGs are equipped with the knowledge, skills, and recognition necessary to deliver exceptional and memorable travel experiences, contributing to the local economy and upholding the cultural heritage and natural beauty that make Sri Lanka a unique and compelling destination.

In conclusion, this comprehensive study aims to inspire continued investment in the professional development of TGs, ensuring that Sri Lanka remains a premier destination for tourists worldwide. By enhancing the capabilities of TGs, the tourism industry can enrich the tourist experience, support sustainable tourism practices, and maintain the country's competitive edge in the global tourism market.

CHAPTER 01: BACKGROUND

Tourism could be considered as an important economic activity around the world due to the direct economic impact. According to the World Travel and Tourism Council (WTTC), the Travel and Tourism Industry is one of the world's most significant economic sectors of any nation (Munasinghe et al., 2020).

Sri Lanka, known for its rich cultural heritage, diverse landscapes, and warm hospitality, has emerged as a popular tourist destination in recent years. In 2023, the tourism industry achieved a robust revival, with the highest influx of tourists to the country since 2019, with 1.5 million visitors (De Silva, 2023). Post the COVID-19 pandemic and Easter Sunday attacks in 2019; the tourism industry faced a multitude of challenges to attract visitors towards the country. However, with the fading away of the pandemic and reassuring security, the industry is now witnessing some light. Minister of Tourism claims that this success owes to collective efforts of public and private sector. While the industry thrived last year, for 2030, the country has set an objective of attracting 4-5 million visitors.

In line with the rise in tourist arrivals, the evolving landscape of tourism, influenced by technological advancements and changing traveller preferences, has implications for the role and relevance of traditional ways of servicing travellers. Hence, re-evaluating the talents and skills of human resources in the tourism sector is critical to prepare the country to harvest the best from the booming industry growth.

TGs are named “*the unofficial ambassadors of a country*” and play a vital role in shaping tourists' experiences. Therefore, it is vital to assess the current and future status of the skills and talents of TGs and diagnose the relevance of TGs to cater to emerging trends in the industry, in creating impressive word of mouth about Sri Lanka as the best tourist destination in the world.

1.1. Introduction to the Study

In recent years, tourism in Sri Lanka has experienced significant growth, positioning the country as a prominent destination in South Asia. The SLTDA plays a crucial role in overseeing the country's planning, development, regulation, and policy implementation of tourism and related industries. One key area of focus for the SLTDA is enhancing industry standards through the professional development of TGs in Sri Lanka.

This research investigates several critical aspects of the TG profession in Sri Lanka. Specifically, it seeks to estimate the current and future demand for TGs, evaluate the existing and expected quality of service and skills of TGs, and understand current and future trends in traveling and visitors' expectations regarding the services and skills of TGs. This research provides insights to inform policy and strategy development within the SLTDA and other Sri Lankan tourism industry stakeholders. By understanding the current state and future trends of the TGs and TG careers, the study aims to improve tourism experiences and services in Sri Lanka, thereby supporting

sustainable tourism growth. Below are the research objectives and questions to answer this study's end.

1.1.1. Research Objectives

1. To estimate the current and future demand for TGs in Sri Lanka.
2. To identify the existing and expected quality of service and skills TGs.
3. To understand the current and future trends of visitors' choice drivers of destinations.
4. To understand visitors' expectations of the services/skills from TGs.

1.1.2. Research Questions

To achieve the above-mentioned research objectives, the following research questions were answered in the process.

1. What is the current estimated size of the TG pool in Sri Lanka & their characteristics?
2. What is the current level of importance & satisfaction of TG service?
3. What are the motivations and challenges faced by the TGs in Sri Lanka?
4. What is the estimated need for TGs in Sri Lanka & future trends?
5. What is the current supply of TGs & What is the gap?
6. What are the international guidelines for standards of TGs?
7. What are the training needs for TGs to prepare them for future industry needs?

Chapter Summary 1: Study background & Introduction to the study

The tourism industry is a significant contributor to Sri Lanka's economy, with Tourist Guides (TGs) playing a crucial role as value creators within the sector. This chapter emphasizes the importance of evaluating and enhancing the current and future skills of TGs to achieve substantial growth in the tourism industry and meet the evolving needs and expectations of visitors. The research aims to assess the quality and quantity of TG skills in Sri Lanka, identifying current skill gaps and forecasting future requirements based on global and local tourism trends. By doing so, the study seeks to inform strategic decisions and investments in TG training and development. Key research objectives include evaluating existing competencies, identifying skill deficiencies, predicting future needs, and designing comprehensive training programs. The chapter also offers policy recommendations for government and private sector investments to support continuous professional development and elevate the standards of TG services. In conclusion, investing in the skills enhancement of TGs is essential for sustaining and boosting the growth of Sri Lanka's tourism industry. Addressing current and future skills needs will ensure that TGs are well-equipped to provide exceptional services, contributing to the overall success and competitiveness of the tourism sector.

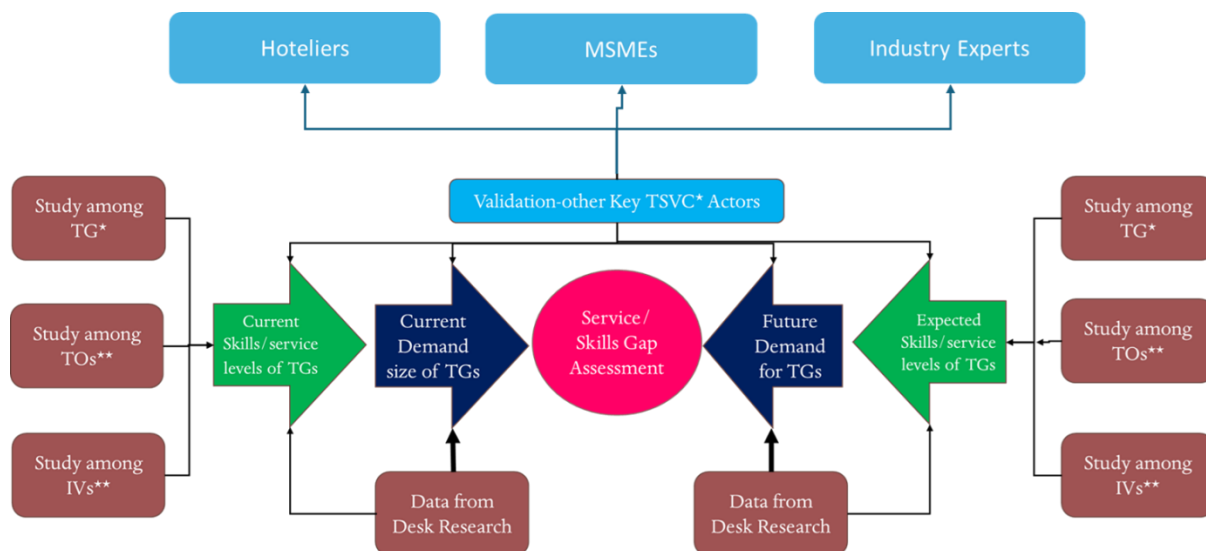
CHAPTER 02: RESEARCH DESIGN

The study framework aims to enhance the skills of Sri Lankan tour guides by strengthening the tourism sector value chain. This involves comprehensive data collection, analysis, and validation from key industry actors to assess current capabilities, forecast future needs, and address skills gaps.

2.1. Study Framework

The study framework presented is aimed at enhancing the skills of TGs in Sri Lanka by strengthening the tourism sector value chain (TSVC). The process involves comprehensive data collection, analysis, and validation from various key actors in the tourism industry to assess current capabilities, forecast future needs, and address skills gaps.

Figure 1: Study framework



The framework begins with a systematic approach to data collection involving the following key groups within the tourism sector.

- Tour Guides - TGs
- TOs - Tour operators
- IVs - International Visitors (Tourists)
- MSMEs - Micro, small, and medium enterprises
- Hoteliers
- Industry experts.

The study among TGs aims to assess their current skills and service levels. This foundational data helps in understanding their strengths and areas requiring improvement. Tour operators provide critical insights into the performance and service quality of TGs from a business perspective, highlighting specific areas where TGs need enhancement, as well as the challenges faced by employers of TGs. Further, tour operators are a critical stakeholder

segment who can share the hardships that they go through due to the skills gap of TGs when servicing their clients. Feedback from visitors offers an external evaluation of TGs' performance, directly measuring how well they meet visitor expectations and the new ways of touring practices that would or would not impact demand for TG service by visitors. Likewise, MSMEs in the study helped share their observation and interactions with TGs, offering a unique perspective on service delivery and potential improvements. Hoteliers' input is crucial as they work closely with TGs and can provide detailed feedback on the quality of services and guest expectations.

Finally, gathering insights from industry experts ensures that the study is informed by a broader understanding of industry trends, best practices, practical challenges, and the evolving needs of the tourism sector globally and in Sri Lanka. The data that are gathered from different stakeholders was used to carry out the following critical assessments in achieving the research objectives.

Current Demand for TGs

The framework then moves to assess the current demand for TGs. This involves combining insights from desk research with consultations with crucial value chain actors, including travel agents, hoteliers, MSMEs, and industry experts. The aim is to quantify the demand and understand the dynamics affecting the need for skilled TGs. This step is crucial in identifying how many TGs are actively involved in the market today and their segmentation in terms of licensed, unlicensed, and by TG types: National, Chauffeur, Site, and Area TGs. While carrying out the current analysis of TGs, it was expected to comprehensively analyze the current TGs' demographic profile, career profiles, and any other diversity in the TG profession.

Future Demand for TGs

The framework then projects the future demand for TGs by considering trends and potential growth in the tourism sector. This involves predicting the size of TGs by TG types required to fulfil the future demand for TG service by tourists. Future projections help in planning short-term and long-term training and development programs for TGs.

Assessment of Current Level of skills/Service

The collected data assesses TGs' current skills and service levels. This stage involves determining TGs' existing competencies from a self-assessment, TGs' challenges when servicing different types of tourists, and identifying TGs' current service levels based on the experience and observation of various stakeholders in the tourism sector. The goal is to map out a comprehensive picture of TGs' current competencies and state of service quality.

Assessment of Future Requirements of Skills/Service Level

Further, the framework will explore the changes required for TGs' skills and competencies to cater to the future requirements of tourists visiting Sri Lanka. Based on the current level of skills and competencies and tourists' satisfaction with the current service levels, future requirements and improvements will be determined using this research framework.

Skills Gap Assessment

With data on current and future skills and demand, the next step is to carry out a service/skills gap assessment. This stage identifies areas where TGs' skills are lacking, and improvements are necessary to meet current and future market needs. The study provides a targeted approach to skills enhancement by pinpointing these gaps. The skills gap in quality and the quantity of TGs is also required to meet the future demand for TG service in Sri Lanka. The gap analysis is expected to suggest revisions to the existing TG training curriculum to prepare TGs for future needs.

Data Validation

Throughout the process, validation from other key TSVC actors ensures the relevance and accuracy of the data and projections. This collaborative approach ensures that the findings and recommendations are comprehensive and practical for implementation. Stakeholder validation helps refine the strategies to enhance TGs' skills, making the study outcomes more robust and actionable.

By including diverse stakeholders in the data collection process, the research framework ensures a holistic understanding of the skills and service gaps of TGs in Sri Lanka. This comprehensive approach enables the development of targeted strategies to enhance TGs' skills, thereby strengthening the tourism value chain.

2.2. Research Methodology

Figure 2: Research approach



The research methodology for this study employs a mixed-method approach, integrating both qualitative and quantitative research. This approach is underpinned by a comprehensive literature review conducted before data collection. The study includes a variety of qualitative and quantitative samples, ensuring that all significant stakeholders (as outlined in the above study framework) are appropriately

engaged. This engagement allows for the collection of crucial insights necessary to address the research objectives and answer research questions.

The inception phase of this research involved an extensive desk review (**Step 1**), which laid the groundwork by absorbing relevant knowledge from existing literature. This review informed the subsequent stages of the research design, ensuring a robust foundation for data collection and analysis. **In Step 2**, qualitative research methods are employed to gather in-depth insights from key stakeholders. This involves unstructured interviews, focus groups, and field observations that facilitate a deeper understanding of TGs' skills and service levels and the expectations and experiences of various actors in the tourism sector. **Step 3** involves quantitative research methods, which include surveys and statistical analyses to quantify the data collected. This phase aims to provide measurable evidence of the current skills, service levels, and future demand for TGs. The qualitative insights complement the quantitative data, offering a comprehensive view of the current state and future needs of TGs in Sri Lanka. By combining these research methods, the study ensures a holistic approach to data collection, enabling a thorough assessment of the skills gaps and service requirements. The mixed-method approach enhances the reliability of the findings and ensures that the perspectives of all relevant stakeholders are captured and considered in the final analysis.

2.2.1. Qualitative Research

As outlined in the above section, one of the main methods of data collection was the usage of the qualitative techniques listed below

Focus Group Discussions (FGDs): Facilitating group discussions with 6-8 participants from different stakeholder groups could uncover shared themes and contrasting viewpoints, fostering a dynamic exchange of ideas.

Mini-Focus Groups Discussions (MFGDs): Smaller, focused group discussions were conducted between 3-5 participants to enable more intimate and detailed conversations, particularly well-suited for exploring sensitive topics or fostering a sense of close discussions among participants.

Pair-Interviews (PIs): The paired/couple interviews were conducted especially among the tourists who travelled to Sri Lanka as couples and also who used the TG service as well as who did not use the TG service.

In-depth Interviews (IDIs): Engaging in one-on-one conversations with TGs, tour operators, hoteliers, industry experts, and tourists allowed for gathering nuanced exploration of their experiences, expectations, and perspectives.

Key Informant Interviews (KIIs): Targeted interviews with key figures within the Sri Lankan tourism industry provided invaluable insights from those with extensive knowledge and experience.

The following table shows the number of qualitative discussions and interviews conducted by different stakeholders during the study.

Table 1: Qualitative research samples

	FGDs	MFGDs	Pair I	IDIs	KIIs
Tour Guides	05	03	-	10	-
Tour Operators /Travel agents	-	08	-	10	-
Hoteliers	-		-	16	-
MSMEs	-	07	-	07	-
Tourists	-	05	10	10	-
Industry Experts	-	-	-	-	20
Total	05	23	10	53	20

The key industry experts mentioned above were interviewed, and their insights contributed to enriching the study design and also to validate some of the data gathered from other stakeholders.

- Sri Lanka Tourism Development Authority (SLTDA)
- Sri Lanka Institute of Tourism and Hotel Management (SLITHM)
- Association of Small and Medium Enterprises in Tourism Sri Lanka (ASMET)
- Skills of Inclusive Growth (S4IG)
- Sri Lanka Eco Tourism Foundation (SLEF)
- Sri Lanka Institute of National Tour Guide Lecturer's Association (SLINTGL)
- Sri Lanka Chauffeur Guide Association
- Department of Wildlife and Conservation (DWC)
- Tourism Bureau – Eastern Province
- Tertiary and Vocational Education Commission Sri Lanka (TVEC)
- Colombo City Restaurant Association
- Sri Lanka Association of Inbound Tour Operators (SLAITO)
- Tourists Police
- The Ceylon Chamber of Commerce (CCC)
- Haputale Tourism and Trade Development Association
- Travel Agents Association of Sri Lanka
- Yala Safari Jeep Providers Association
- Anuradhapura Professional Tour Operator's Association
- Cultural Triangular Hotelier's Association
- “Intrepid” Travel Organization

The sampling technique used for the recruitment of the participants for the qualitative discussions is purposive sampling.

The following steps were used to ensure the robustness of the qualitative data collection process.

Step 1

The discussion guides (DGs) were prepared with industry experts. These guides were crafted to comprehensively address all relevant topics and questions, ensuring a thorough exploration of the subject matter. Recognizing the linguistic diversity in Sri Lanka, we prepared the discussion guides in both Sinhala and Tamil to facilitate effective communication with local stakeholders. For the interviews among tourists, the DGs were translated into the respective languages of the participants to ensure clarity and accuracy in the responses. All the discussion guides used in the research are annexed at the end of this report.

Step 2

Preparing for qualitative discussions involves meticulously selecting and training moderators and interviewers. The pool of interviewers and moderators included experts and researchers in the tourism industry sector.

Step 3

Identify the study participants and recruit them for the discussions. Except for tourists, most tourists were interviewed at the airport's departure area, and all other stakeholders were identified through a recruitment process using purposive sampling techniques.

Step 4

The discussions were conducted by trained moderators, and the data were taken forward for validation and analysis. The findings gathered from qualitative research were validated through expert interviews and from the data collected at the quantitative stage of the study.





Qualitative Data Analysis

Qualitative data collected from the interviews was subjected to two main types of analysis: content analysis and thematic analysis. Content analysis was used to summarize the data, providing a structured overview of the responses. This method allowed us to quantify and systematically categorize the information obtained. For thematic analysis, NVivo was employed to identify key themes and particular coding patterns. NVivo facilitated the organization and examination of large volumes of qualitative data, enabling us to uncover deeper insights and recurring patterns within the data. This software helped systematically code the data, identify relationships, and recognize patterns crucial to answering all the research questions. The data analysis was conducted by a dedicated team of researchers and technical experts. This team was responsible for ensuring the accuracy and reliability of the analysis process, applying their expertise to interpret the data effectively. By leveraging both content analysis and thematic analysis, the research team was able to derive comprehensive and nuanced insights from the qualitative data, contributing significantly to our understanding of the skills and competencies required by TGs in Sri Lanka.

2.2.2. Quantitative Research

At the quantitative stage of the study, a survey strategy was used for data collection, using semi-structured questionnaires prepared to focus on answering the research questions. Additionally, all specific insights from the qualitative study assisted in designing the survey instruments for different stakeholder groups. Different questionnaires were prepared for data collection from different stakeholder groups and attached in the annexure at the end of this report.

Table 2: Quantitative research sample

	Number of surveys	Data collection methods	Sampling technique
TGs	300	CAPI F-F	Stratified Random sampling
Tour Operators	32	CAPI/CATI	Purposive Sampling
Hoteliers	100	CAPI/CATI	Purposive Sampling
MSMEs	312	CAPI F-F	Stratified Random Sampling
Tourists	302	CAPI F-F	Convenience Sampling
Total	1046		

After finalizing the questionnaires, they were translated into multiple languages and then programmed onto the "Survey to Go" platform to facilitate Computer-Aided Personal Interviews (CAPI) and computer-aided telephonic Interviews (CATI). These data collection methods were used based on the most convenient method for the respondents. The table below presents each stakeholder segment's sample covered in the quantitative survey using different sampling techniques.

The Survey to Go platform offers a variety of tools for quantitative data collection and facilitates a comprehensive quality-checking process to ensure the accuracy and reliability of the collected data. Data collection spanned all provinces to reach the designated stakeholders except the tourists contacted for the survey at the airport departure areas. Enumerators conducted the field data collection, representing each province across the country.

A rigorous quality-checking process was used to ensure the accuracy and integrity of quantitative data. Supervisors accompanied enumerators during initial interviews with each data collector trained to guarantee proper data collection procedures have been deployed. Additionally, 30% of each enumerator's interviews underwent back checks, where supervisors compared recorded responses to respondent recollections. Furthermore, telephone backchecks were conducted with a sample of respondents to confirm the accuracy of the entered data. The quality of the data collection process was further evaluated by reviewing voice recordings from

a randomly selected sample of surveys completed. Map checks verified the sampling process and respondent authenticity for interviews with location data. Finally, time checks ensured enumerators dedicated appropriate time to each study completed. Together, these steps form a comprehensive system to maintain high data quality and reliability throughout the data collection.

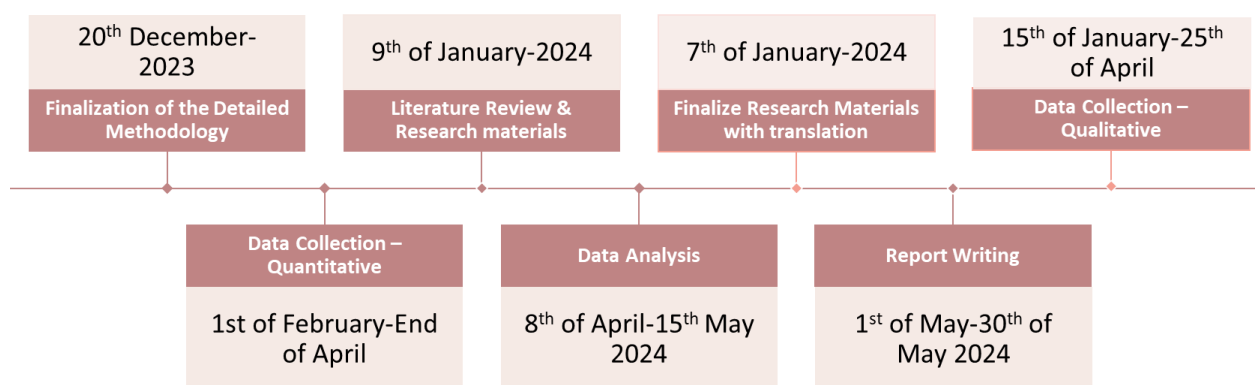
Quantitative Data Analysis

The gathered data from TGs, tourists, tour operators, MSME representatives, and hoteliers underwent rigorous quantitative analysis using the Statistical Package for the Social Sciences (SPSS) software. This software facilitated a comprehensive analysis, employing descriptive analysis to summarize key characteristics of the data. Cross-tabulations were then utilized to identify potential relationships between different variables. Finally, regression analysis was employed to delve deeper, examining the influence of specific factors on TG skills. This multifaceted approach provided a robust understanding of the quantitative data, illuminating valuable insights for enhancing TGs' skill development.

2.2.3. Study Timeline

The study's timeline is presented below. According to this timeline, data collection took place during the three months starting in February to April 2024, which was a peak season for tourism in Sri Lanka. As a result, a few challenges were encountered during the data collection period, which are discussed below.

Figure 3: Study timeline



2.2.4. Challenges and Study Boundaries

1. Difficulty in contacting Tour Operators and TGs for the research due to the peak season

TGs and tour operators were heavily occupied with their duties, guiding and attending to tourists during the data collection period, which left them with limited time for additional activities. As a result, contacting them for research purposes became feasible only after the peak season. However, all planned discussions with TGs were conducted as scheduled. Some discussions were shifted to online sessions held during the night hours to accommodate their daytime unavailability.

2. The limited time of the industry experts due to busy schedules

Some of the industry experts were not contactable or did not have adequate time to take part in the study and also to gather required secondary data for deeper analysis of the skills supply side. Therefore, data was analysed with limited data and after making reasonable assumptions on areas where the data was not available.

3. Resistance from some tourists to take part in the study

Collecting data from some tourists proved to be particularly challenging, as many of some nationalities were reluctant to participate in the survey for various reasons. Cultural differences and unfamiliarity with research practices were among the factors contributing to their hesitation. Additional efforts were made to bridge these gaps by using the same nationality data collectors. Despite these efforts, the response rate from certain tourists remained lower than expected, impacting the completeness and diversity of the data collected.

4. Constraints in organizing qualitative group discussions with tour operators

Organizing qualitative discussions with tour operators was constrained due to their busy schedules, especially those working with large-scale operations. Tour operators are involved in managing complex itineraries and logistics for multiple tourist groups, which limits their availability for interviews. This constraint made it challenging to arrange group discussions as everyone was not available at one time for group discussions. Efforts were made to accommodate their schedules and conduct interviews at times convenient for them, and hence, group discussions were converted to one-to-one interviews, limiting the ability to capture conflicting ideas. The differences in perspectives were finally identified at the analysis stage.

Chapter Summary 2: Study Design

This study utilized a comprehensive framework involving critical value chain actors—Tourist Guides (TGs), tour operators, hoteliers, micro, small, and medium-scale enterprises, and tourists—to assess the current and future quantity and quality of TG skills. Employing a mixed-method approach, the research commenced with a detailed desk review and expert interviews, followed by extensive qualitative and quantitative studies among the aforementioned value chain participants. Despite encountering some practical challenges in contacting relevant stakeholders during the peak season of data collection, the study was successfully conducted, and the data were analysed using scientific methods and approaches.

CHAPTER 03: DESK RESEARCH - SYNOPSIS

This chapter culminates the invaluable insights gleaned from a comprehensive desk review carried out as part of this study requirement. It delves into critical areas relevant to Sri Lanka and proposes future strategies for enhancing the tour-guiding profession in the country. These strategies are formulated after a thorough triangulation of the findings from primary research among key stakeholders in the value chain, underscoring the significance of desk research in shaping our understanding. This synopsis includes the role of TGs, the evolution of the tourism industry in Sri Lanka, the introduction to TG categorization in Sri Lanka, and available training for TGs.

3.1. The Role of Tour Guides

The multifaceted profession of tour guiding encompasses various roles and categories, both globally and locally. TGs cater to diverse interests and preferences, providing insights into customs and culture to adventure guides leading thrilling experiences in challenging terrains. TGs are professionals who lead groups of tourists through various sites, providing interpretation, information, and insights into historical, cultural, and natural heritage. They play a pivotal role in the tourism industry by enhancing the visitor experience and acting as ambassadors for the destinations they represent. According to Cohen (1985), TGs are responsible for educating tourists about the significance of the places they visit, ensuring their safety and well-being, and offering accurate and engaging commentary. They possess in-depth knowledge of local culture, history, and customs, as well as the ability to communicate effectively with diverse audiences. TGs are often multilingual, enabling them to cater to the needs of international tourists (Brito et al., 2020; Cambridge Dictionary, n.d.-a). The role of a TG extends beyond providing information; they are also skilled in managing group dynamics, ensuring smooth logistics, and adapting their tours to meet the needs and interests of their clients (Kassawneh et al., 2019; Nejmeddin, 2019).

TGs encounter numerous challenges globally, from limited destination knowledge to political unrest, disrespectful tourists, and adverse weather conditions. In Sri Lanka, cultural nuances amplify challenges, including pressure to visit specific establishments, competition from unlicensed and foreign guides, lack of standardization in payments, poor accommodation, lack of respect from stakeholders, and unfair working conditions. Despite these challenges, TGs' role is pivotal in providing value for visitors. Effective communication, awareness of tourist requirements, cultural sensitivity, skills to manage stressful situations, and adherence to safety standards may contribute to positive and enriching tourist experiences. Beyond these fundamental aspects, TGs globally create value through co-created experiences, facilitating interactions between locals and tourists, understanding when to speak or be silent, displaying local knowledge, and guiding visitors to unique photographic spots.

As the tourism industry evolves, TGs must adapt to changing expectations and embrace diversity to meet the needs of modern and sophisticated tourists. TGs can enhance customer

satisfaction and contribute significantly to the tourism experience by continuously refining their roles and addressing challenges. In this dynamic landscape, the tour guiding profession remains essential in bridging cultures, fostering understanding, and creating memorable journeys for visitors worldwide. An exploration of visitor experiences underlines the impact of TGs on shaping memorable journeys. Recommendations include standardizing and dignifying the TG services, improving the cultural sensitivity of guides, enhancing infrastructure and facilities at tourist sites, and addressing price discrimination issues. The role of identity branding for TGs is discussed, drawing parallels with successful models like the Blue Badge system in the United Kingdom.

Furthermore, as tourism trends shift towards greater inclusivity, the need for accessible tourism is emphasized. As articulated by ISO and supported by organizations like the European Network for Accessible Tourism (ENAT), global standards stress the importance of universal accessibility in tourism, promoting equality, diversity, and inclusion. Implementing these standards in the Sri Lankan tour-guiding profession requires concerted training, education, and awareness to ensure that TGs are equipped to cater to visitors with diverse accessibility needs. Embracing accessible tourism aligns with international principles and presents a significant opportunity for Sri Lanka to enhance its reputation as an inclusive and welcoming destination. Further, recognizing and promoting the crucial role of TGs in facilitating interactions between tourists and local communities is necessary. This underscores the importance of elevating the status of TGs within the broader tourism community, positioning them as valuable contributors to the overall tourism product.

The evolving expectations of tourists in the modern age emphasize the need for TGs to offer more than just information. They must provide memorable and authentic experiences. TGs pass various touchpoints, stakeholders, and scenarios throughout this journey of creating memories. Therefore, there are many challenges TGs face that should be deeply analyzed. Further, the need to elevate the status of TGs within the tourism community, both locally and globally, was emphasized.

In addition to their role as cultural interpreters and educators, TGs are frontline influencing visitors' perceptions and experiences. They are responsible for ensuring the safety and comfort of tourists, managing logistics, and providing accurate and engaging commentary throughout the tour (Kassawneh et al., 2019; Nejmeddin, 2019). TGs must navigate challenges such as cultural differences, unexpected situations, and diverse client expectations while maintaining professionalism and delivering a high standard of service.

Technology has increasingly become a part of their toolkit, with guides using mobile applications for guiding and leveraging social media for promoting tourism and engaging with travellers (Wang et al., 2012; Fernando, 2017). The evolving role of TGs reflects broader changes in the tourism industry, requiring continuous adaptation and training to meet the demands of modern travellers and advancements in technology (WFTGA, 2022; ITG, n.d.-a).

TGs also play a critical role in promoting sustainable tourism practices and responsible travel behaviours, aligning their work with environmental conservation and cultural preservation

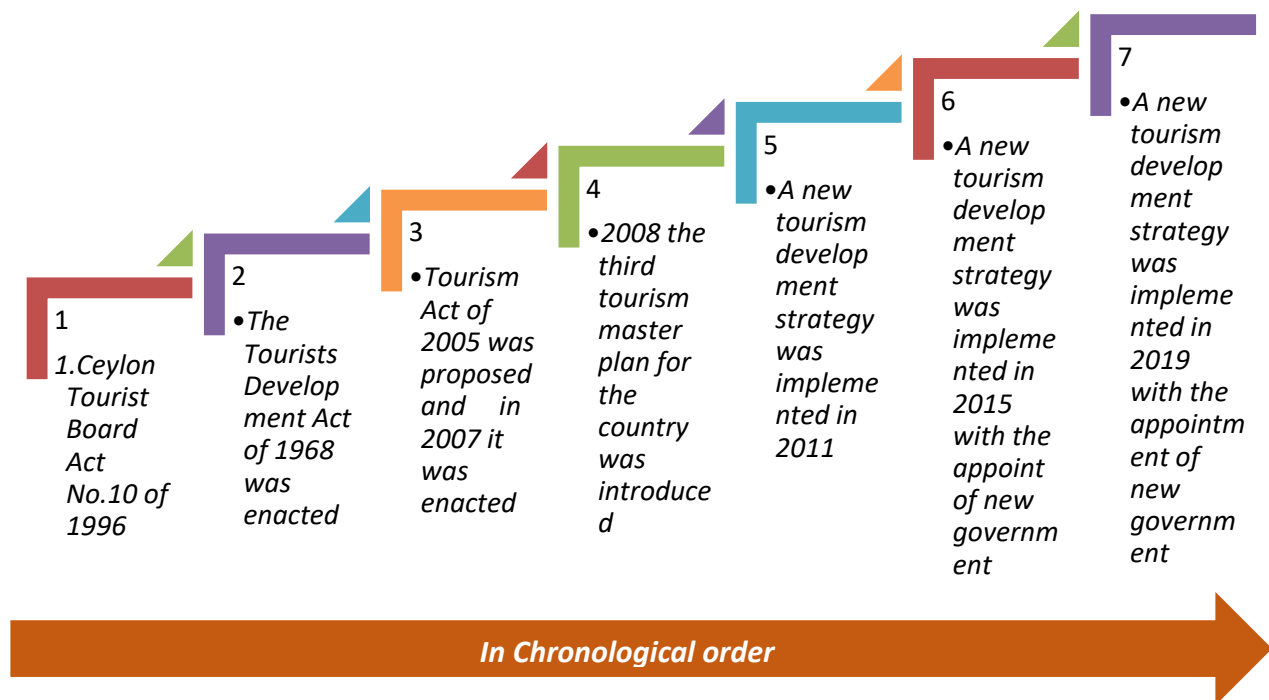
efforts (UNWTO, 2023; Haugen, 2022). As Sri Lanka aims to position itself as a top-tier tourist destination, the chapter concludes by highlighting tourists' evolving expectations. The future of TGs in Sri Lanka is envisioned as a profession that goes beyond conventional roles, providing visitors with unique and shareable experiences, thus contributing to the country's global appeal and destination image.

3.2. History of Tour Guiding and the Evolution of the Tourism Industry in Sri Lanka

In ancient times when travel was dangerous, uncertain, and took considerable time and effort to achieve, TGs were more in the role of pathfinders, or geographical guides, helping travellers to find their way out of unknown terrain and provide protection (Khalil, 2021; Khattab et al., 2018). According to Cohen (1985), pathfinding evolved as the needs of the travellers evolved, even serving special interest travellers such as safari guides or guides for hunting trips. Another evolution of the TGs in ancient times was that of a mentor, a spiritual pathfinder helping pilgrims travel across different terrains to reach spiritual destinations (Brito et al., 2020). Modern tourism, as is recognised now, only came into being after the mid 1940's and the aftermath of World War II (Rabotic, 2010).

Although a deep history of tour guiding can be found in other countries, this was added to the tourism industry in the recent history of Sri Lanka. The well-known role of the Sri Lanka TG was only developed after the government made plans to build tourism systematically and implemented the Ceylon Tourist Board Act No. 10 of 1966. After that, the Tourist Development Act of 1968 was enacted, and tourism in Sri Lanka was developed systematically. After this, due to political factors such as closing the economy between 1970 to 1977 and 26 years of war starting from 1983, major changes to planned tourism did not occur. Between 2002 and 2006, the country had relative stability, and the Tourism Act of 2005 was proposed. In 2007, it was enacted, thereby replacing the earlier 1966 Act. In 2008, the third tourism master plan for the country was introduced. 2009, the war ended, and a new tourism development strategy was implemented in 2011. In 2012, it achieved two significant milestones: the “Million Tourist Destination” milestone and the “Billion Dollar Export Income Earner” milestone. In 2018, revenue through tourism was at an all-time high of US \$4,380 million. In 2019, a Gazette notification on Tourist (Guiding Services) Regulations (No.01 of 2019) was published on the advice of the SLTDA and under the Tourism Act No. 38 of 2005. TGs and their training fell under the regulatory authorities set up by each Tourism Act, and official channels were set up to maintain the professional standards of TGs in Sri Lanka (refer to *Figure 4*).

Figure 4: Evolution of the Tourism Industry in Sri Lanka



3.3. The Sri Lankan Tour Guides' Categorization

Tour guiding in Sri Lanka is structured into four distinct categories, each serving unique roles within the tourism industry.

1. National TGs
2. Chauffeur TGs
3. Area TGs
4. Site TGs

Those four categories are the main types of TGs who work under the valid license of the government. The TG training body is SLITHM and the licensing body is SLTDA.

National TGs are licensed professionals who possess comprehensive knowledge of Sri Lanka's history, culture, and natural attractions. They are proficient in multiple languages and are tasked with providing detailed commentary and guidance across the country's diverse destinations, from ancient archaeological sites to bustling urban areas (SLITHM, 2023; SLTDA, 2019). These guides play a vital role in showcasing the country's rich heritage to international visitors, ensuring informative and engaging experiences. Normally National TGs can guide any TGs without having a limit and hence they are guiding a specific number of tourists at once from smaller groups to larger groups.

Chauffeur guides, another category, are drivers who are also licensed to provide basic tour guiding services. They offer a dual role, driving tourists to various locations while also offering insights into local attractions and culture. Chauffeur guides are often chosen for their extensive knowledge of local routes and destinations, making them ideal for travellers who prefer a more

flexible and personalized itinerary (SLTDA, 2022a; SLTDA, 2022b). They provide convenience and flexibility, allowing visitors to explore Sri Lanka at their own pace. Usually, Chauffeur TGs maximumly guide seven people on one occasion in their vehicles.

Area guides specialize in specific geographical regions within Sri Lanka, offering in-depth knowledge of local culture, history, and attractions. These guides are integral to promoting lesser-known destinations and supporting sustainable tourism practices in rural areas. Area guides collaborate closely with local communities to provide authentic experiences, contributing to economic development and cultural preservation efforts (Samarathunga & Jayathilake, 2018; SLTDA, 2023). They play a crucial role in diversifying tourism offerings and spreading the benefits of tourism beyond popular destinations. Usually, Area TGs can do the guiding within only the relevant area in their province, so outside the province or their area, they are not allowed to do the guiding.

Site guides focus on specific sites or attractions within Sri Lanka, providing specialized insights and detailed information to visitors. They are experts in the history, architecture, and significance of individual sites, enhancing visitors' understanding and appreciation of cultural and natural heritage. Site guides often lead tours at UNESCO World Heritage sites, ancient temples, and other significant landmarks, offering comprehensive narratives and engaging interpretations (SLTDA, 2022b; WFTGA, 2022). Their expertise contributes to enriching visitor experiences and promoting the preservation of important cultural and historical sites. Usually, they are allowed to do the tour guiding only in their sites, and outside of those sites, they are not allowed to guide tourists.

The important fact is that National and Chauffeur TGs can do the guiding anywhere in Sri Lanka, but Area or Site Guides can't do the guiding outside their area or sites.

3.4. Training Context for Tour Guides in Sri Lanka

Qualifications and training for TGs are rigorous and varied, encompassing both formal education and practical experience. Organizations such as the Institute of Tourist Guiding (ITG) emphasize the importance of certification and ongoing professional development to ensure guides maintain high standards of knowledge and service (ITG, n.d.-b). In terms of qualifications and training, TGs undergo rigorous preparation to obtain certifications and licenses that demonstrate their competence (ITG, n.d.-b; NAITA, 2022). These programs equip them with essential skills such as communication, storytelling, problem-solving, and leadership as well as the ability to manage group dynamics and adapt tours to meet the needs and interests of travellers (Smith, 2023; Weiler & Walker, 2014). Aiming to enhance the credentials and skills of TGs, the training curricula for TGs in Sri Lanka, as outlined by the Ministry of Education and SLITHM, encompasses a range of technical and soft skills necessary for a practical TG. The Ministry of Education's National Competency Standards and Competency Based Training Curriculum emphasizes the foundational knowledge of tourism

concepts and the development of essential competencies, while the National TGs Course from SLITHM focuses on history, professionalism, and tour guiding skills.

Additionally, global training guidelines, such as those provided by the World Federation of Tourist Guide Associations (WFTGA), offer specialized courses like the 'Hands-on Tourist Guide Training' to enhance practical skills and knowledge. When Sri Lanka's curriculum is compared to global standards, the focus on technical and soft skills is well represented. However, a more in-depth review is necessary to ensure that Sri Lanka's TGs meet global standards in cultural awareness, sustainable tourism, and Continuous Professional Development (CPD).

In the upcoming data analysis, the research team focuses on profound derivatives directly addressing the research objectives and questions. Specifically, we will scrutinize the data to highlight areas where TGs can enhance their skills and professional standing. Through quantitative assessments and qualitative examinations, we aim to identify patterns and trends that can inform recommendations for skill development programs. The data analysis will play a crucial role in understanding the current landscape of tour guiding in Sri Lanka, pinpointing areas for improvement, and proposing strategies to elevate the profession. By aligning our analysis with the overarching research objectives, this study anticipates providing actionable insights that contribute to advancing TGs' professionalism in the local tourism industry.

Chapter Summary 3: Overview of the Desk Research

This chapter synthesizes the critical insights from an extensive desk review undertaken to enhance the tour-guiding profession in Sri Lanka. The research delves into the multifaceted role of Tour Guides (TGs), the evolution of the tourism industry in Sri Lanka, the categorization of TGs, and the available training programs for them. TGs, who are pivotal in providing visitors with enriching experiences, face numerous challenges that require addressing to elevate their professional standing. Their roles encompass not only sharing knowledge about cultural, historical, and natural heritage but also managing group dynamics and ensuring visitor safety and comfort. The chapter underscores the importance of continuous professional development and the need for TGs to adapt to evolving tourist expectations and technological advancements. The history of TG in Sri Lanka is relatively recent, with significant developments occurring after the establishment of the Ceylon Tourist Board in 1966 and subsequent legislative acts. The evolution of the tourism industry has been influenced by political and economic factors, with major milestones achieved post-war in 2009. Sri Lanka's tourism industry saw remarkable growth until the pandemic and political unrest caused fluctuations. The chapter highlights how historical and modern influences have shaped the TG profession, emphasizing the need for structured and regulated tour guiding services to maintain high standards and enhance visitor satisfaction. Sri Lanka's tour guiding system is categorized into four distinct types: National TGs, Chauffeur TGs, Area TGs, and Site TGs. Each category has specific roles and geographical scopes, with National and Chauffeur TGs having the flexibility to guide anywhere in Sri Lanka, while Area and Site TGs are restricted to specific regions or sites. The training context for TGs is robust, involving rigorous preparation and certifications. Organizations like the Sri Lanka Institute of Tourism & Hotel Management (SLITHM) and the Sri Lanka Tourism Development Authority (SLTDA) play crucial roles in providing formal education and practical training to ensure TGs meet high professional standards.

CHAPTER 04: RESEARCH FINDINGS

4.1. The Current Estimated Size of Tour Guides & Tour Guides' Characteristics.

The Population of Registered Tour Guides in Sri Lanka

As of November 2022, SLTDA reported 4,629 licensed TGs registered under their authority. This diverse group of guides consisted of National Guides, Chauffeur Guides, Area Guides, and Site Guides. There were 1,798 National Guides, 1,476 Chauffeur Guides, 1,253 Area Guides, and 102 Site Guides actively serving the tourism industry in Sri Lanka as per the SLTDA registration.

SLTDA's updated records indicate a significant increase in registered TGs, with the total now standing at 4,887. This increase of 258 guides over approximately 16 months reflects growth across all guide categories. This indicates a five to six percentage increase in TGs registered at SLTDA over the 16 months since November 2022. The current distribution includes 1,892 National Guides, 1,552 Chauffeur Guides, 1,339 Area Guides, and 104 Site Guides. The increased number of TGs of 258 during the 16 months can be estimated as 94 National Guides, 76 Chauffeur Guides, 86 Area Guides, and 2 Site Guides.

This growth in the number of licensed TGs is indicative of the ongoing development and expansion of the tourism sector in Sri Lanka. It highlights a robust increase in both workforce capacity and the country's appeal as a tourist destination. The following Figure (*refer to Figure 5*) will indicate the presence of the above-mentioned numbers.

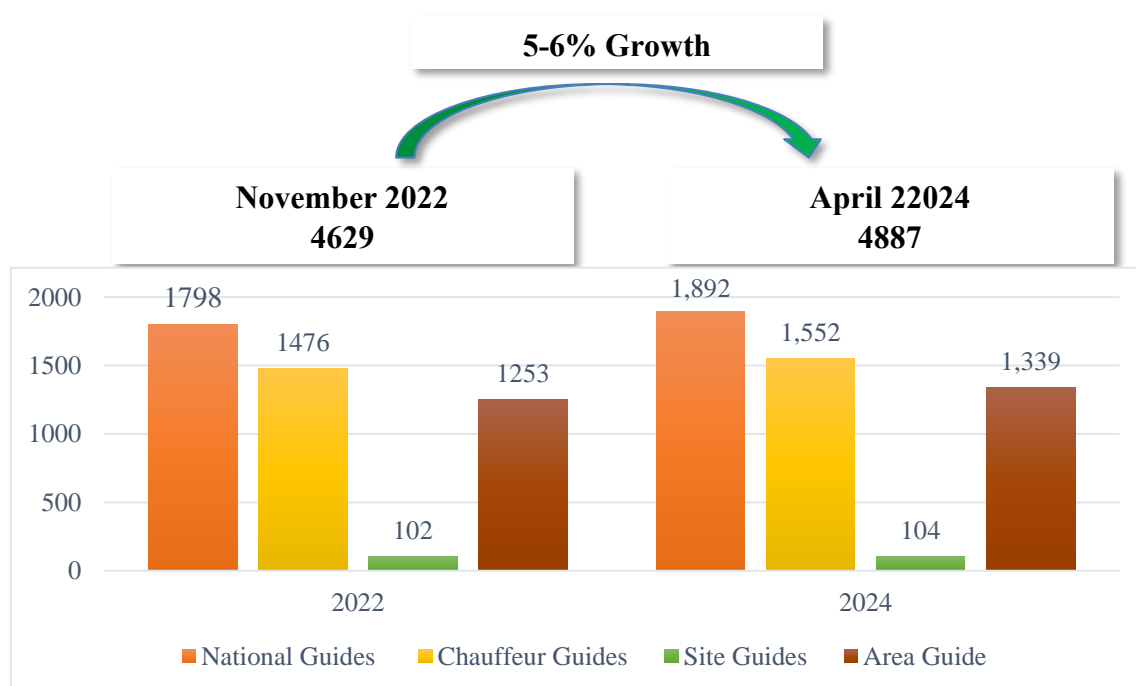


Figure 5: Number of TGs in Sri Lanka - 2022 & 2024

Nonetheless, experts in the industry believe that there are many more Site guides actively working at the regional level, and they seem to have not registered in SLTDA registration. Furthermore, some of the National TGs interviewed within this study revealed that nearly 50 percent of the National TGs registered at SLTDA are active currently, and hence only around 900-1000 National TGs contribute to the tourism industry today.

Representation of Tour Guides Categories in Sri Lanka

Figure 6: TGs composition by categories

The study findings revealed that 77 percent of these guides were officially licensed. In comparison, 23 percent did not identify under the four recognized categories of National Guides, Chauffeur Guides, Area Guides, and Site Guides. This 23 percent represents guides who potentially operate without official SLTDA licensing, indicating a significant presence of unlicensed TGs in the country (refer to *Figure 6*).

The survey revealed the above percentage representation of TG by their categories and unlicensed TGs. Hence, applying these rates to the licensed TG population in 2022 and 2024 reported in SLTDA, the following estimates can be made regarding the popularity of TGs, including licensed and unlicensed, in Sri Lanka. Accordingly, a total of 1460 unlicensed guides and 4887 licensed guides are estimated as of May 2024 (refer to *Figure 7*).

Question: How do you identify yourself as National guide, Chauffeur Guide, Site Guide, Area Guide, or any other? (Survey Sample: 300 TGs)

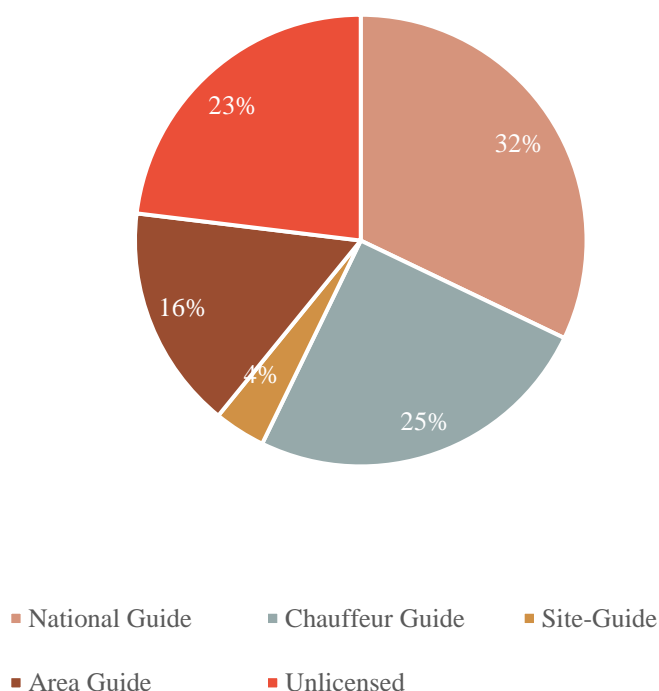
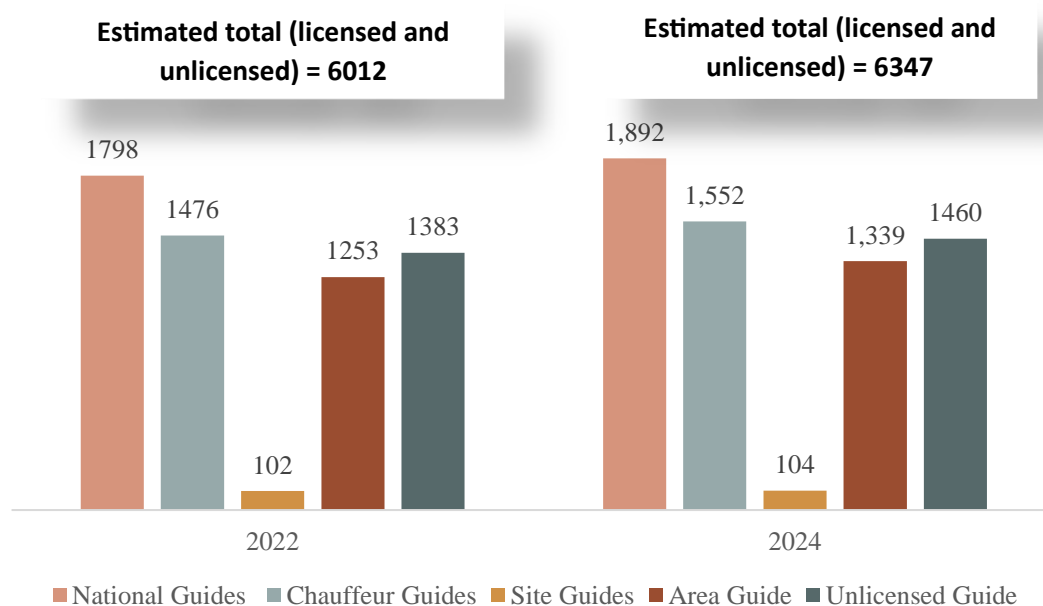


Figure 7: Estimation of TGs by their types (unlicensed and licensed)



However, many of the value chain actors who were subjected to the study, such as industry experts, tour operators, and even TGs, believe that many other segments of people act as TGs and provide TG service to tourists. Therefore, the TG population includes many informal guides, which makes the TG profession fragmented. For instance, there are Three-wheeler drivers who act as TGs, which are commonly found in the country's popular tourist areas. Some of these informal guides are named after Surf Boy, City Boy, etc. The below-presented quotation from MSMEs and National TGs provides some evidence to it.

“Some guides who bring tourists, for example, three-wheel drivers, don't have much knowledge. They cannot properly speak in English. They say, 'come & go' and 'yes & no'. I doubt whether the tourists get any experience of Sri Lanka”- MSMEs

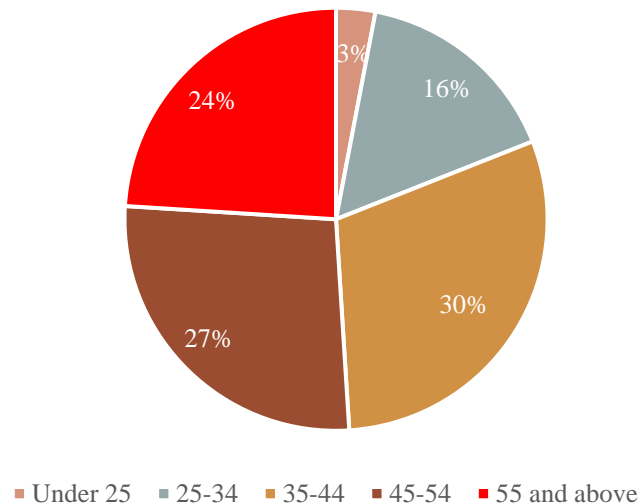
“These days most of the school leavers get a three-wheeler and just join the industry thinking that they can do tourism”- National TG

The Population Estimate of Tour Guides by age

The age profile of TGs in Sri Lanka reflects a diverse workforce, spanning young adults to older, more experienced individuals. This distribution shows a significant presence of middle-aged and older individuals in the profession, with the largest segment being those aged 35-44 (30%). This age group is crucial as it often combines youthful energy with significant professional experience (refer to Figure 8).

Figure 8: Age profile of TGs

Question: How old are you? (Survey Sample: 300 TGs)



Nevertheless, qualitative discussions constantly prove that plenty of “Older TGs” remain in the population.

“Lots of National guides are very old people. I have seen many of them who say that they started tour guiding in 1995. I have met many like that”. - Hoteliers

“There are many older TGs who are experienced and can speak more than 6 languages, but they are very old” - An Area TG

“Currently, our best guides are over 45 to 50 years old, having obtained their licenses when they were young and now possessing 15 to 20 years of experience”. - A Tour Operator

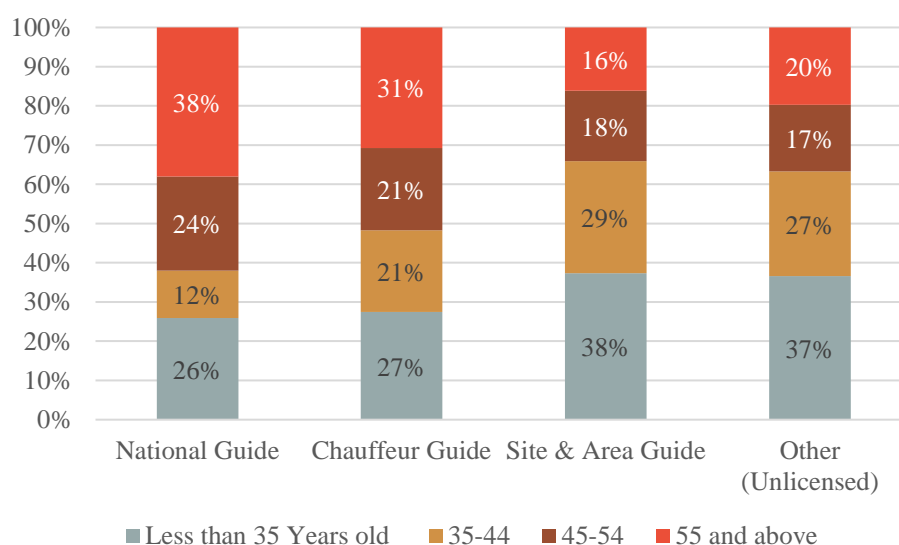
“The older guides have no problem in the language area because they have years of experience. This isn't about being qualified or not, it's about years of learning and accumulation of knowledge. A guide with 10 or 15 years of experience cannot compete with someone who has been guiding for 20 years. It's simply the result of continuous learning” - Tour Operators

From the words of different stakeholders, many of them have appreciated TGs who are older in age, and hence, it is clear that experience matters more than qualification in the TG profession. Accordingly, experience plus qualifications could make the TG profession unparalleled.

As presented in the below figure (refer to Figure 9), National guides tend to be older, with 24 percent aged 45-54 and 38 percent aged 55 and above. This suggests that National guides, who

often have extensive knowledge and experience to lead tours across the country, are seasoned professionals. Chauffeur guides also exhibit an older demographic, with 21 percent aged 45-54 and 31 percent aged 55 and above. This is possibly due to the dual responsibility of driving and guiding, which may appeal more to experienced individuals. Site and Area guides are more balanced in age, with a higher proportion of younger guides (38% under 35). This can be attributed to their specialization in specific areas or sites, which may require less extensive experience than National or Chauffeur guides. unlicensed guides composition is highly represented by youngest TGs, with 37 percent under 35 years old. This younger demographic reflects the lower entry barriers and perhaps the more informal nature of their employment.

Figure 9: TG size by their age



Based on the data revealed from the survey, a total of 1206 guides are below 35 years old; 1904 guides are in the age range of 35-44, 1714 guides have fallen to 45-54, and 1523 guides are of the age of 55 and above in the population. The table below presents the TG estimates by age as of May 2024 (refer to [Table 3](#)).

Table 3: TG population by age

Estimation	Total TGs estimate
Below 35 years	1206
35-44 Years old	1904
45-54 years old	1714
55 and above	1523
All	6347

The Population Estimate of Tour Guides by Gender

The gender composition of TGs in Sri Lanka reveals a significant gender disparity. Out of the 300 surveys conducted within TGs, the population is a male-dominated profession with 97% male representation; there is a significantly low representation of females (refer to *Figure 10*).

As *Figure 11* below, the near-total male dominance in the Chauffeur guide category is notable. This could be due to societal norms and expectations and the dual role of driving and guiding, which is traditionally viewed as male-oriented work.

While the Site and Area guides show slightly higher female representation (10%), it still indicates a substantial gender gap. Cultural factors, late working hours, and safety concerns are significant barriers to female participation in the tour guiding profession. Despite these challenges, qualitative insights highlight that few female TGs are highly effective in their roles. These women often bring unique strengths to the profession, including solid communication skills, empathy, and the ability to connect with tourists on a personal level. Female TGs are particularly successful in niche markets. For example, those guiding French tourists have received positive feedback for their cultural sensitivity and language skills. These guides often excel in creating a welcoming and informative experience for their clients, enhancing the overall quality of the tour.

Figure 10: Gender distribution of TGs

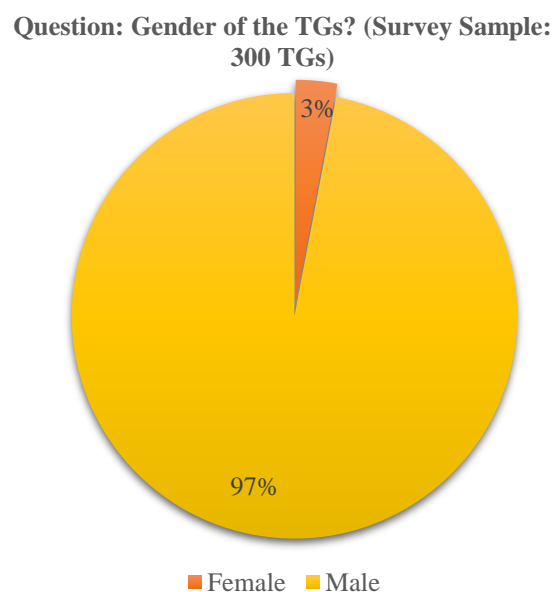


Figure 11: Gender representation of TGs - each category



The qualitative insights show some fair performances and good discussions about female TGs in this context. According to the globally renowned website *timeout.com*, Sri Lanka has been named the top destination for solo female travel in 2024. Hence, this is an excellent opportunity to create awareness among the female population and give more chances for females to participate in the industry and to elevate into the TG career.

“Many females are not involved in tourism due to cultural negative perceptions and practical difficulties, such as late-hour working. But we have a couple of females in our group, in our association. They are doing very well. We must encourage them. Some of them are leading guides. They are very popular”- Industry Expert

A female TG came here with an “Egypt” group. She can speak English and French, she was very knowledgeable, and tourists had a good impression of her” - Hotelier

Based on the data revealed from the survey, a total of 6157 guides are male, and 190 female guides are there in the industry approximately. The table below presents the TG estimates by gender as of May 2024 (*refer to **Error! Reference source not found.***).

Table 4: TG population by gender

Estimation	Total TGs estimate
Male	6157
Female	190
All	6347

Tout Guides’ profile by Marital Status

Most TGs in Sri Lanka appear to be married (*refer to Figure 12*). The data reveals that 84 percent of guides are married. This trend holds for all guide types, including National guides, Site and Area guides, and Site guides, as well as those categorized as "Other" (potentially unlicensed guides) (*refer to Figure 13*).

Figure 12: Marital status of TGs in Sri Lanka

Question: Are you married? (Survey Sample: 300 TGs)

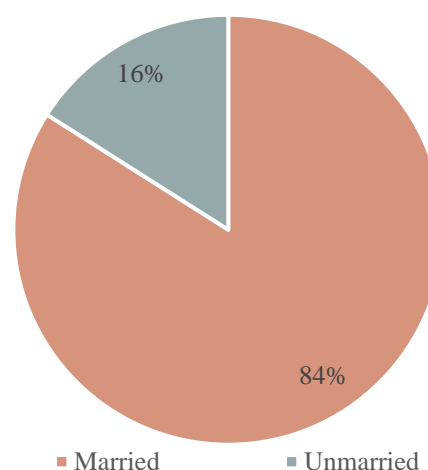
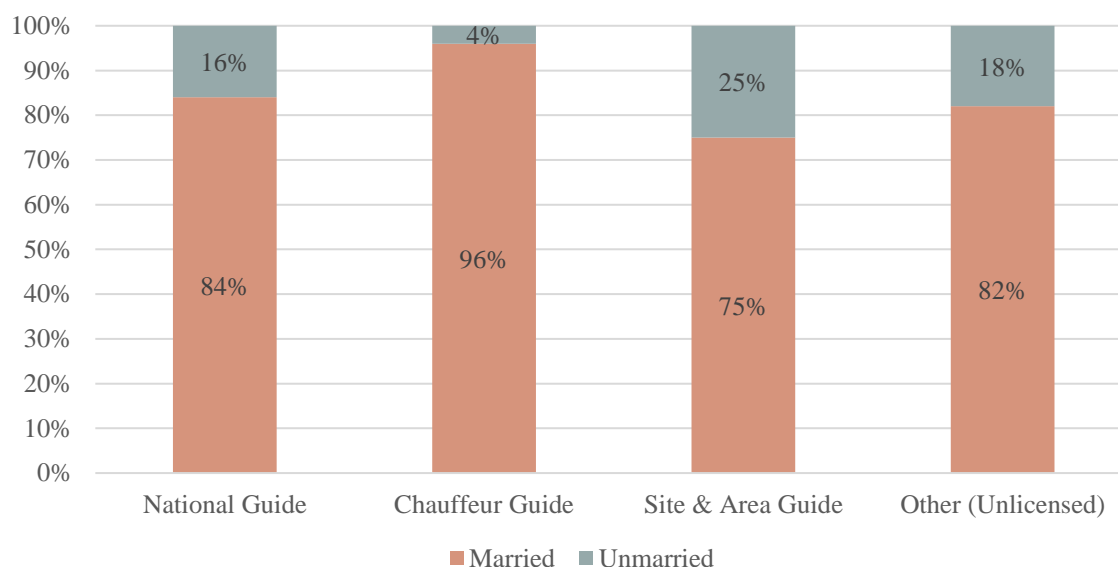


Figure 13: Marital status of TGs by their type



Tour Guides' Profile by their Level of Education

Figure 14: Education level of TGs

When talking about the characteristics of TGs in Sri Lanka, it's very important to figure out their education levels. The Figure 14 shows the quantitative data insights indicating the education level of TGs in Sri Lanka (refer to Figure 15). It highlights a significant disparity in educational qualifications among various TG categories in Sri Lanka. National guides appear to be the most qualified, with 22 percent with bachelor's degree or higher qualification. The Site and Area guides, where 12 percent hold a bachelor's degree or higher.

Unlicensed guides seem to have the lowest qualifications, with only 36 percent with primary education level qualification. Notably, a substantial portion (73%) of Chauffeur guides and a significant number (53%) of unlicensed guides at of secondary school education level (up to A-levels) (refer to Figure 15).

Question: What is the highest level of education you have obtained? (Survey Sample: 300 TGs?)

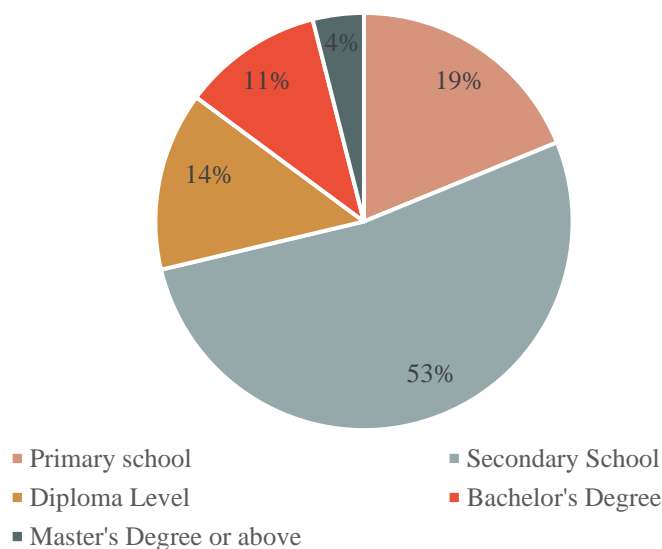
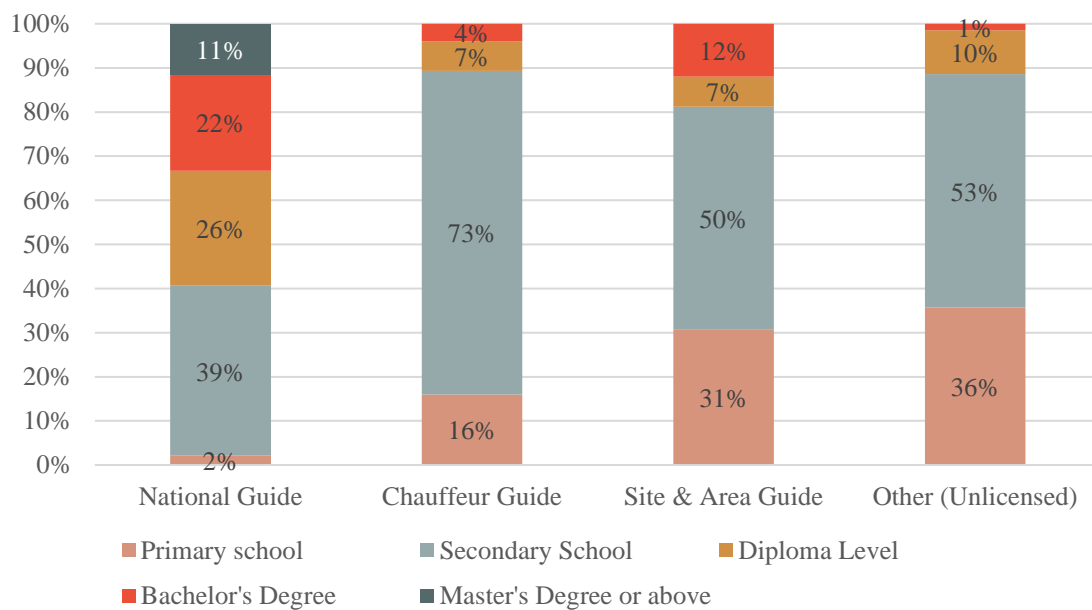


Figure 15: Education level of TGs by their type

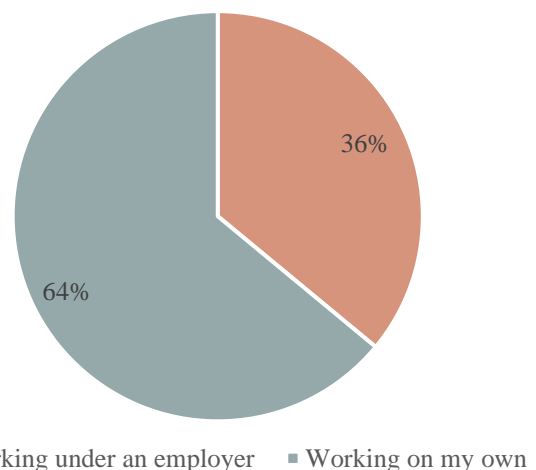


Tour Guides' Profile by their Working Arrangements

Figure 16: Working arrangement of TGs

According to the 300 TGs surveys conducted in this study, the working arrangement of TGs has been monitored as a crucial factor in deciding the characteristics of TGs in Sri Lanka. Tour guiding in Sri Lanka exhibits a diverse range of employment arrangements, reflecting the flexible nature of the profession. The data indicates that a substantial portion of TGs operate freelance. Specifically, 36 percent of TGs work under an employer, while 64 percent work independently (*refer to Figure 16*). The guides who have claimed that they work under an employer don't always mean that they are in the permanent cadre of an employer, but they work for some tour operators and might or might not be permanent employees of those companies.

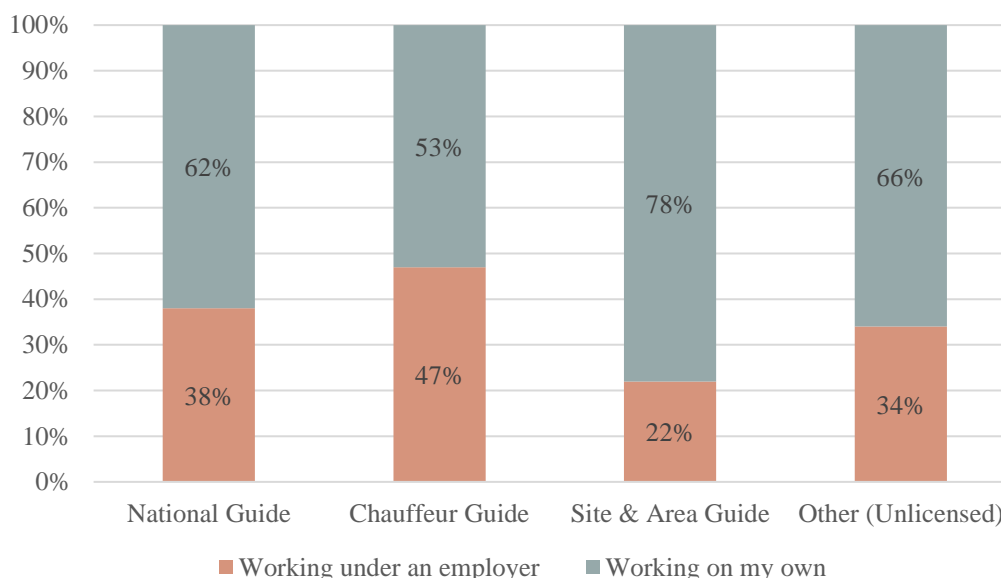
Question: Are you working under an employer or working on your own?



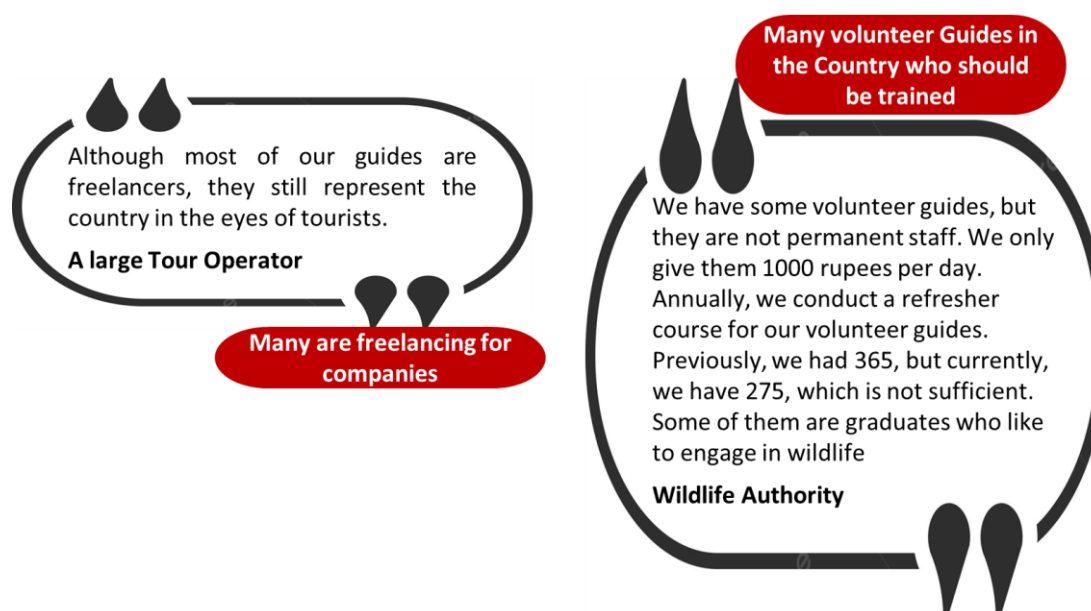
Irrespective of licensed or unlicensed, freelance tour guidance seems common when observing the working arrangement of TGs by their categories. The most extensive freelance arrangements are among the Site and Area guides and the Unlicensed guides. Nonetheless, many National and Chauffeur guides also do not work under an employer. Chauffeur TGs show the highest percentage of employment status, mainly because many large and medium-scale tour operators

have their own vehicles and prefer to hire full-time Chauffeur TGs for these positions (*refer to Figure 17*).

Figure 17: Working arrangement of TGs by their type

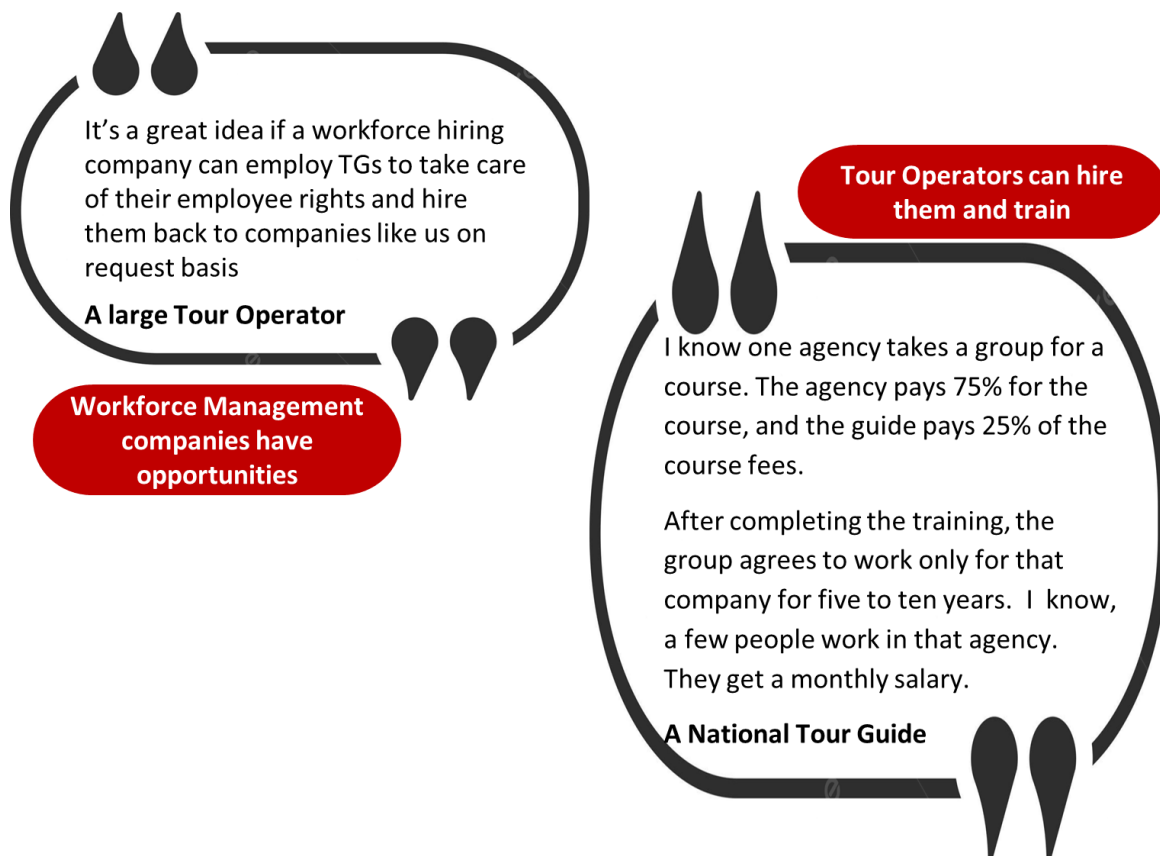


Nevertheless, the qualitative study findings presented below prove that freelance employment is common among TGs. The study also found that many volunteer groups of TGs serve in the country, including well-educated people. The lack of a mechanism for these passionate freelance or volunteer TGs to formalize their profession would be one of the barriers in their career lives.



This work arrangement could be concerning for some TGs, while others must enjoy the freelancer nature of the job given the independence they can enjoy in their careers. However, this freelance nature also introduces specific challenges. Freelancers often lack the job security and benefits that come with formal employment. There are also issues related to income stability, especially during the off-season when tourist numbers dwindle.

Despite these challenges, the passion for guiding remains high, with many TGs expressing a solid commitment to their profession. Hence, in the qualitative discussions, some of the TGs suggested a solution to reduce the vulnerability of this employment problem. One such solution is ensuring workforce management companies recruit freelancers and groom them with more transferable knowledge, hire them for tour operators during the tourism season, and occupy them in other related occupations during the off-season. Another suggestion is that Tour Operators recruit the TGs, train them with a shared course fee between the company and the TGs, and then absorb the good TGs as contract employees.



The lower percentage of the employment status of working under an employer is seen among Area and Site TGs since tour companies only need to hire them for specific occasions or locations. Interestingly, the percentage of unlicensed TGs working under an employee is slightly lower than that of national TGs. This can be attributed to some tour operating organizations hiring unlicensed TGs. As per the below quotation, it is proven that tour operators hire many unlicensed guides and train them according to the requirements of their clients' expectations.

Some Tour Operators resist hiring licensed TGs



We don't usually consider licensed guides. Licensed TGs tend to be arrogant, thinking they're the best-educated and most qualified. They aren't humble. Working with them isn't suitable for my organization. Most people who work with me don't have a license, and I don't care about the license either.

A Small-scale Tour Operator.



Tour Guides' Profile by their Primary Source of Income

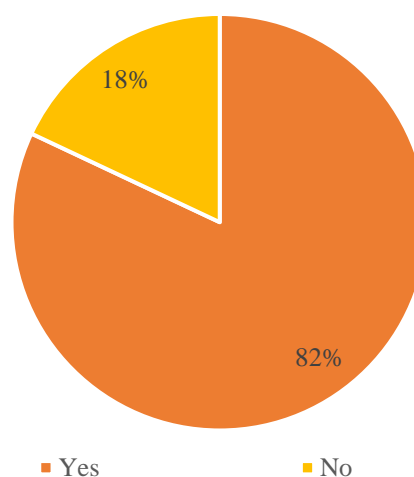
Figure 18: Is tour guiding main source of income of TGs?

When discussing TGs' working arrangements, understanding their primary sources of income would be an essential aspect, too. Hence, the quantitative survey captured the percentage of TGs who consider the income earned by the guiding as their primary source of income.

According to the study findings, 82 percent of the TGs consider the income earned from tour guiding as their primary source of income (*refer to **Error! Reference source not found.***). This poses a critical concern for TG, who involve in tour guiding as freelancers, especially during the off-season as their primary source of income get disturbed significantly.

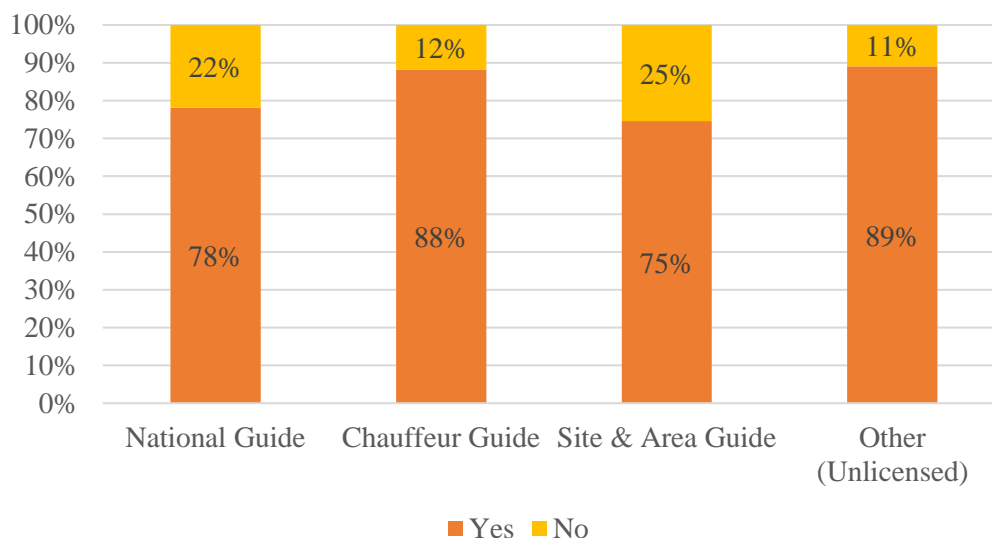
While a large majority of all types of TGs claimed that tour guiding is their primary source of income, 22 percent of national TGs stated that tour guiding is not their main source of income.

Question: Is tour guiding your main source of income?



Similarly, 25 percent of Site and Area guides seem to have some other income source as their primary source of income. Nonetheless, the primary source of income for the majority of Chauffeur and unlicensed guides is tour guiding as per the study results (*refer to* Figure 19).

Figure 19: Guiding as an income source by TG types

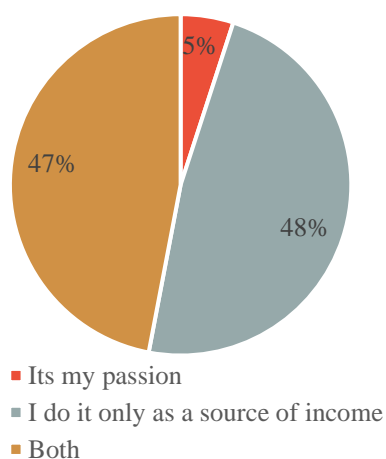


Tour Guides' Affiliation Towards Tour Guiding

It is essential to see that a more significant segment, like more than half, considers guiding their passionate job (6% stated tour guiding is done for sheer passion and 47% mentioned that they consider guiding as a passion as well as their main living), while the others do this as their source of income (48% identify guiding as their main source of income more than the passion) (*refer to*). Six percent of TG mentioned that they are involved in tour guiding as they are purely passionate about it and are involved in other employments such as teaching, banking, hiring vehicles, and hotel managers, and some own their businesses.

Figure 20: TGs affiliation towards tour guiding

Question: Do you do guides as that is your passion or as a typical job? (Survey Sample: 300 TGs)

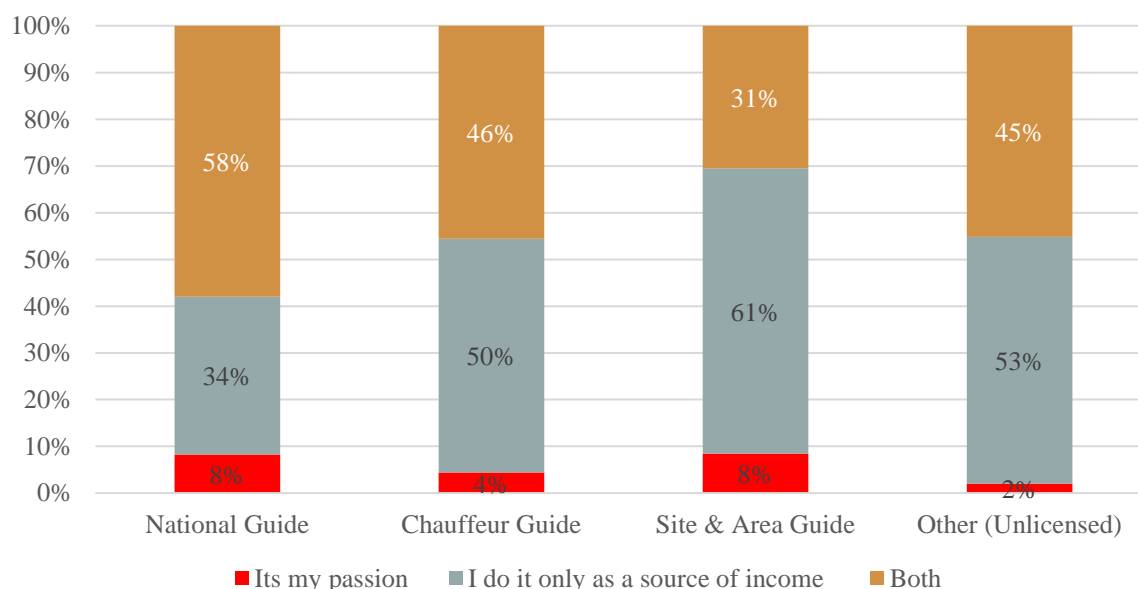


Those who do Tour guiding only as their passion, their employment is;

- Business
- Teaching
- Hire vehicles
- Bank officer
- Hotel manager
- Development Officer
- Clerk
- Human Rights Director

A large segment of National TGs considers their job their passion as well as their main source of income (58%), which is very important as they are trained considerably more than the others. A similar trend can be found among the Chauffeur TGs and Unlicensed TGs. Nonetheless, the majority (61%) of Site and Area guides (61%) consider guiding as their main source of income (*refer to Figure 21*).

Figure 21: Is tour guiding a passionate job or not? - by types of TGs

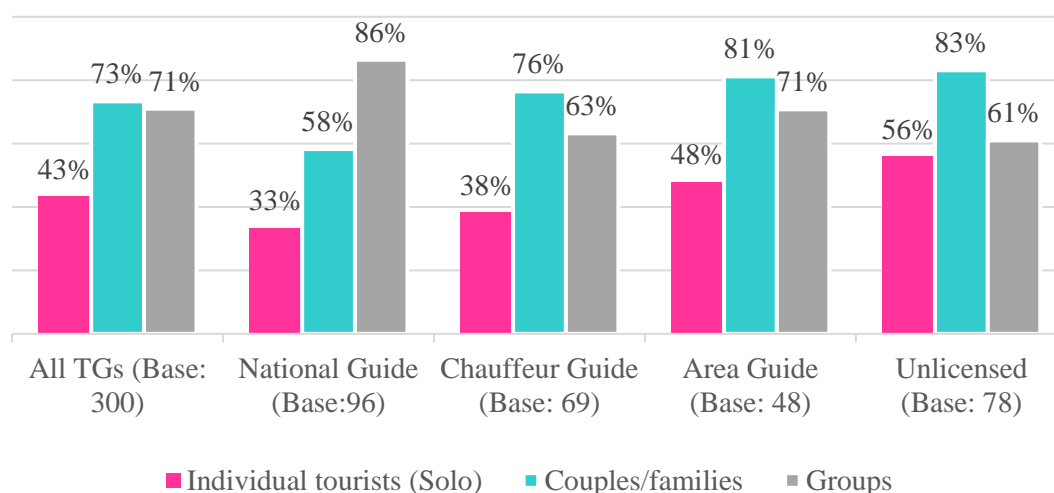


Tour Guides' Profile by the Type of Tourist they Handle

The quantitative survey determined the types of tourists that TGs typically serve. The survey investigated whether guides primarily work with solo travellers, couples, large groups of tourists, or other categories.

Figure 22: Composition of TGs based on client types

Question: What type of tourists do you mostly provide guiding services?



The above figure (*refer to Figure 22*) reveals some interesting trends regarding TGs' clientele. Most TGs handle families and couples, with 73 percent of TGs reporting servicing them. This suggests a substantial market for TGs who can cater to the needs of families and couples, perhaps by offering experiences tailored to different age groups or interests. On the other hand, solo travellers seem to be a less common clientele who seek TG service, with only 43 percent of TGs reporting working with them. This might indicate a preference among solo travellers for independent exploration or self-guided tours.

The graph further unveils variations in clientele preferences between different types of TGs. National guides stand out for their focus on large tour groups, with 86 percent reporting servicing tour groups. This could be due to their expertise in national landmarks and historical narratives, making them ideal for larger, structured tours. Further, National guides who work under tour operators must drive larger tour group businesses where they are primarily involved.

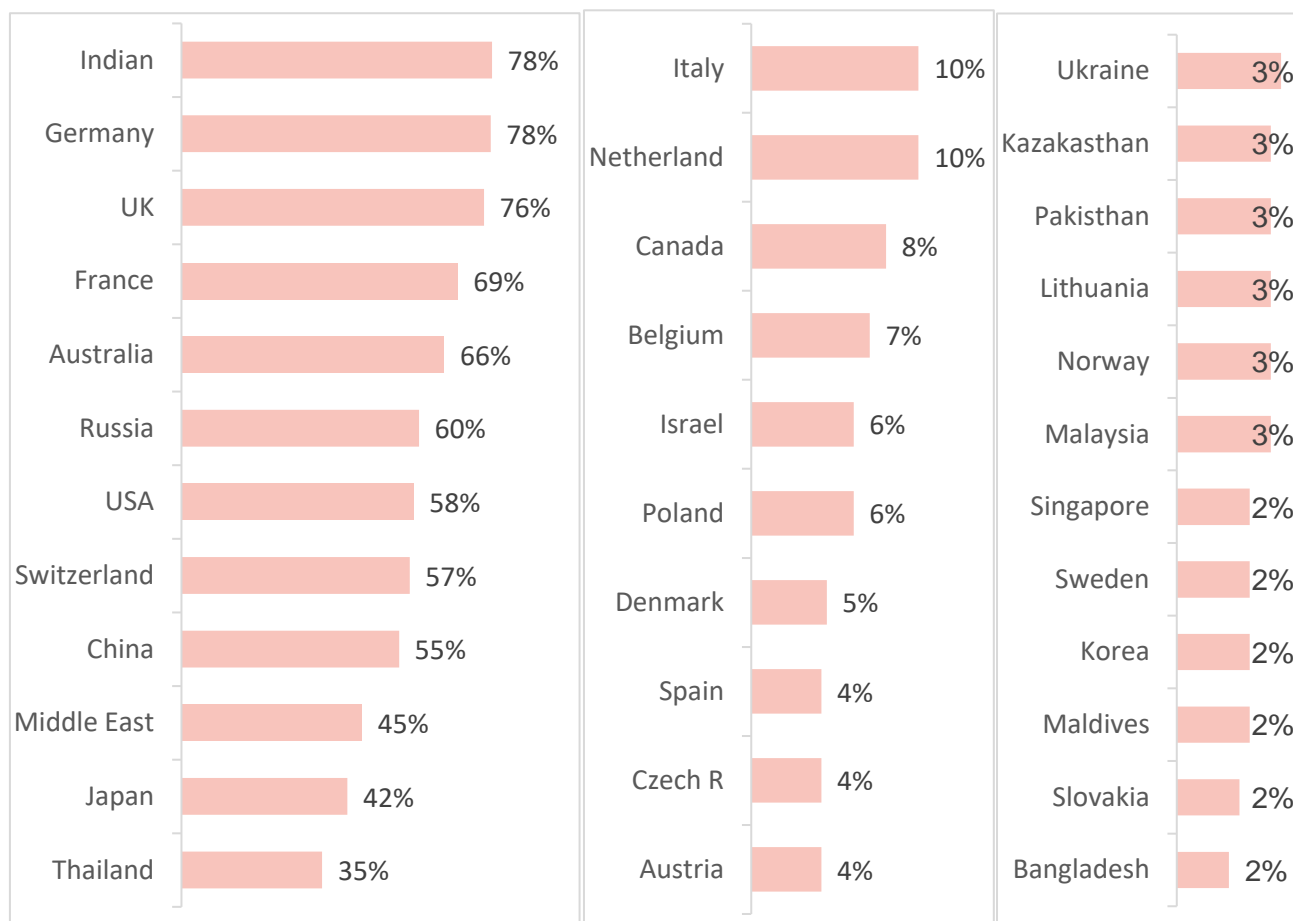
Conversely, Unlicensed guides seem to gravitate towards families and couples. A noteworthy 83 percent reported working with families and couples, potentially reflecting their flexibility and ability to personalize experiences, catering to specific family needs or couple preferences. The maximum group size of Chauffeur guides can handle seven; hence, it is more practical for most Chauffeur guides to service families and couples. Further, 38 percent of Chauffeur guides who have claimed that they service tour groups mean the groups are larger in size than the average group size of four to five they handle usually.

It is interesting to note that most Unlicensed guides (83%) service families and couples. However, around 60 percent service tour groups, which is a remarkable trend. Another observation is that Unlicensed guides seem to get more solo business compared to other types of licensed guides.

Tour Guides' Profile by the Type of Markets they Handle

Composition by the markets they handle provides an in-depth look at the types of tourists serviced by TGs in Sri Lanka, highlighting the diversity and challenges faced by TGs in their professional interactions. Nearly 75 percent of Sri Lankan TGs service tourists are primarily from India, Germany, and British. The next largest nationalities served by TGs include French, Australians, Russians, Americans, Swiss, and Chinese. Middle East, Japan, and Thailand tourists are also served by a sizable segment of TGs. On average, a Sri Lankan TG handles tourists from 7-8 different nationalities, reflecting a significant level of exposure and versatility (*refer to Figure 23*).

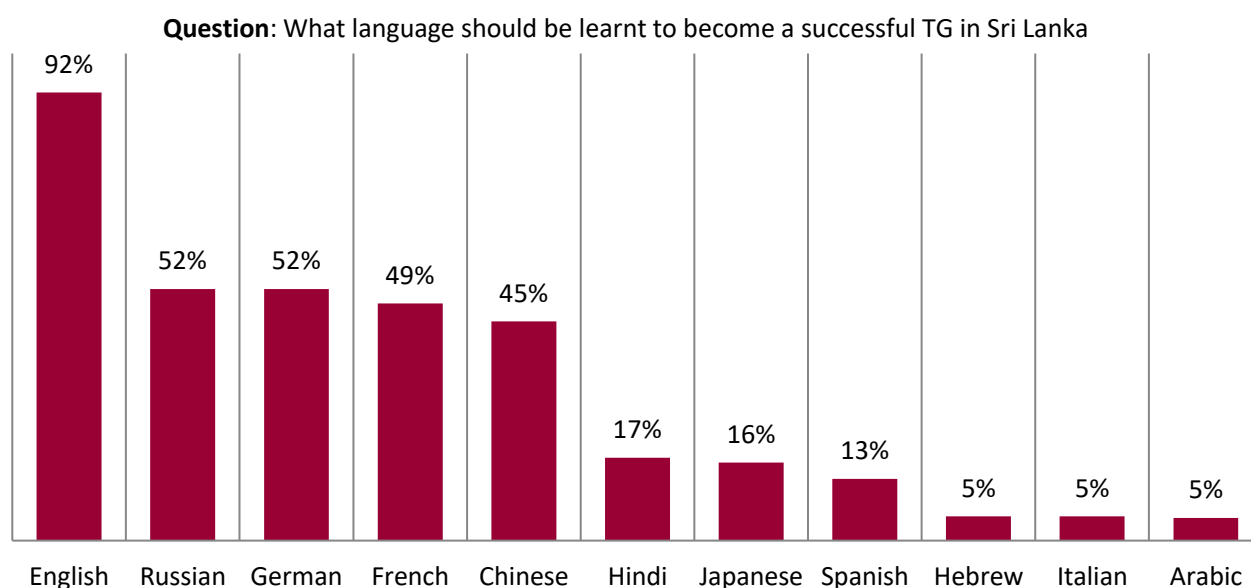
Figure 23: TGs composition by the market they handle



Tour Guides Signify the Languages of Importance for their Profession.

Language proficiency is critical for the success of tour guiding profession. According to the question, “What language should be learned to become a successful TG in Sri Lanka?” the following key insights have been identified from TGs’ perspective. Language proficiency is critical for TGs’ success, with English universally acknowledged as a must-have skill. Additionally, TGs identified several other important languages in which to excel, including Russian, German, French, and Chinese. A smaller segment also highlighted the importance of Hindi, Japanese, and Spanish. Other languages, such as Hebrew, Italian, Arabic and also Portuguese, Tamil, Polish, Czech, Korean, Lithuanian, Slovak, Swedish, Malayalam, Hungarian, and Greek, were highlighted by a few like less than five percent of TGs as important languages for TG to consider learning (refer to [Figure 24](#)).

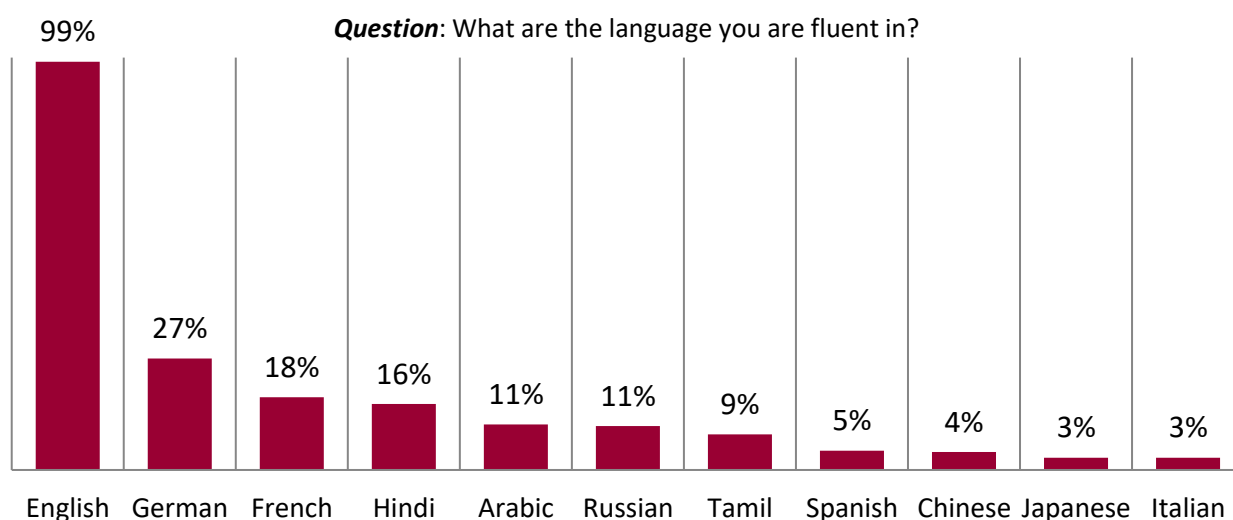
Figure 24: Language requirements to be a successful TG in Sri Lanka



Tour Guides' Profile by the Language Competencies.

The above-discussed languages TGs think is essential to learn. Here, the effort is to understand what languages TGs are fluent in today. Almost all the TGs have claimed they are fluent in English, and around 30 percent can speak German. Approximately 20 percent are competent in French and Hindi. However, Arabic, Russian, and Tamil speaking abilities can be found among a smaller segment of TGs, like 10 percent. However, there needs to be more Mandarin-speaking TGs, which is critical given the significant number of Chinese tourists visiting Sri Lanka. The scarcity of Mandarin-speaking TGs is partially offset by the fact that Chinese tourists often travel in large groups, allowing fewer TGs to manage larger groups of Chinese visitors. Despite this, the need for more Mandarin-speaking TGs remains a pressing issue to ensure better service and communication with Chinese tourists (*refer to Figure 25*).

Figure 25: Languages fluent by TGs in Sri Lanka



When comparing the important languages identified and fluent by the TGs, the country needs to increase the number of German, French, Russian, and Mandarin-speaking TGs, as portrayed in the Figure 26 below.

Figure 26: Important Vs. fluent language by TGs

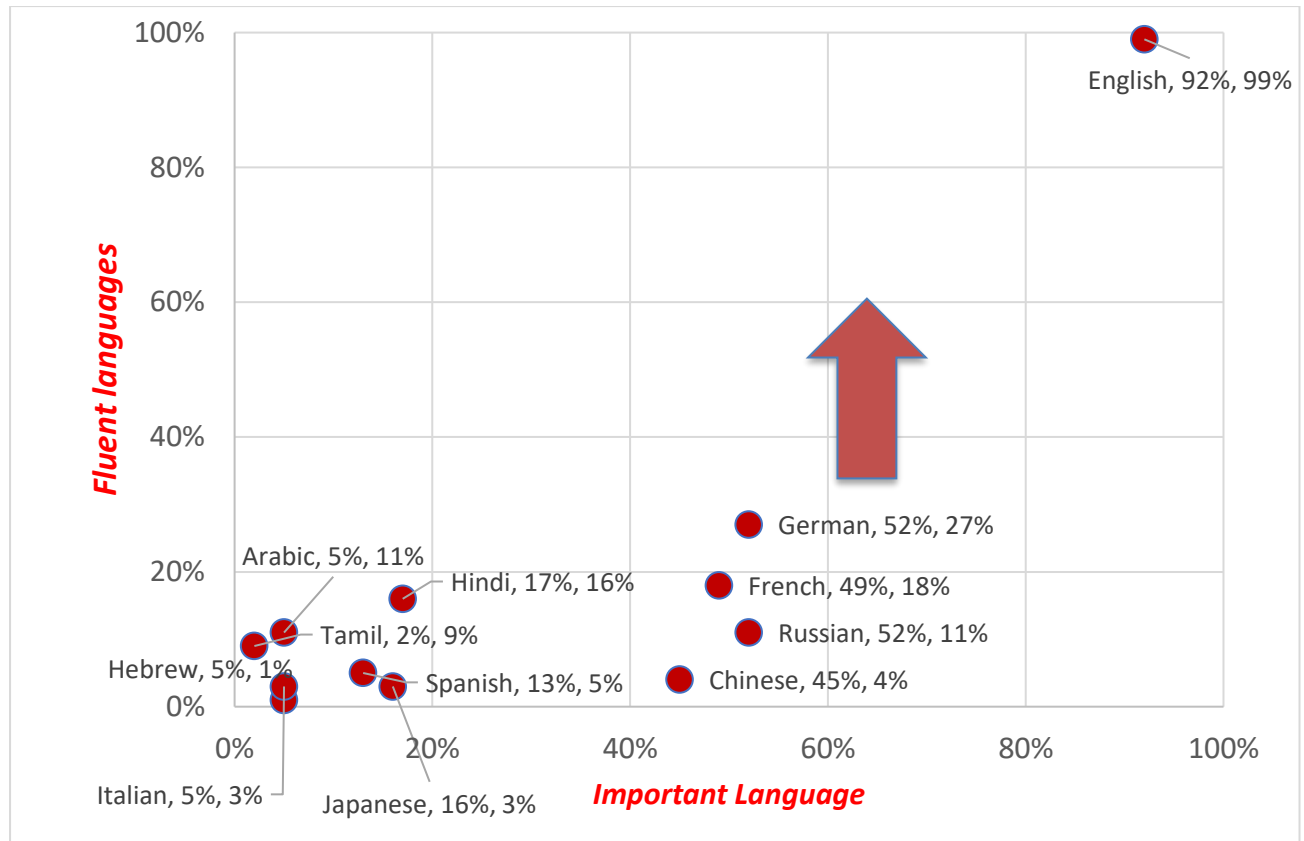
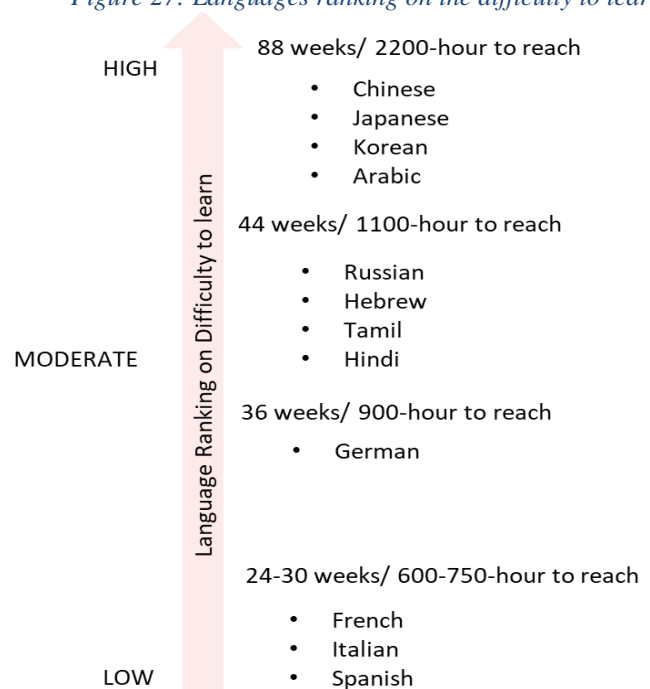


Figure 27: Languages ranking on the difficulty to learn

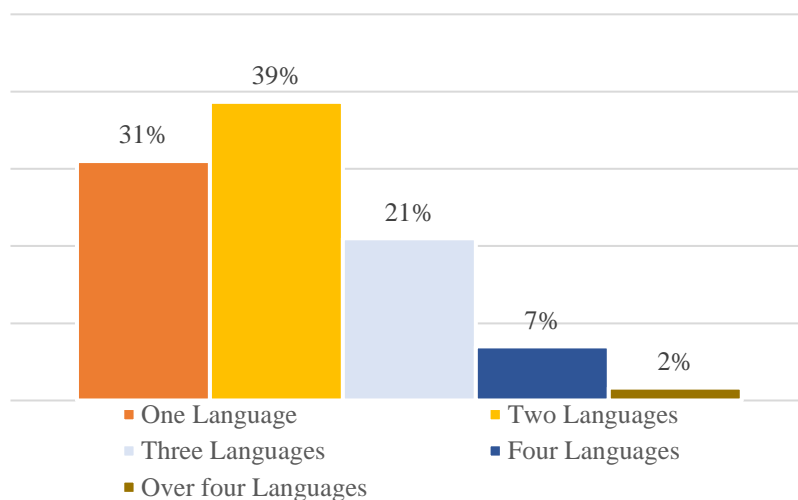
However, when evaluating the feasibility of imparting the skills of these languages to TGs in Sri Lanka, Chinese is the most complex language to learn, as per the Foreign Service Institute (FSI) US Department of State's ranking of the languages' difficulty to learn presented below. According to this language ranking, even learning Japanese, Korean, and Arabic takes a longer time, approximately 2200 hours. Not only that, it takes 1100 hours to learn Russian too (refer to Figure 27).



Source: Foreign Service Institute (FSI) US Dept of State

Tour Guides Composition of Multilingual Abilities

Figure 28: Multilingual capabilities of TGs

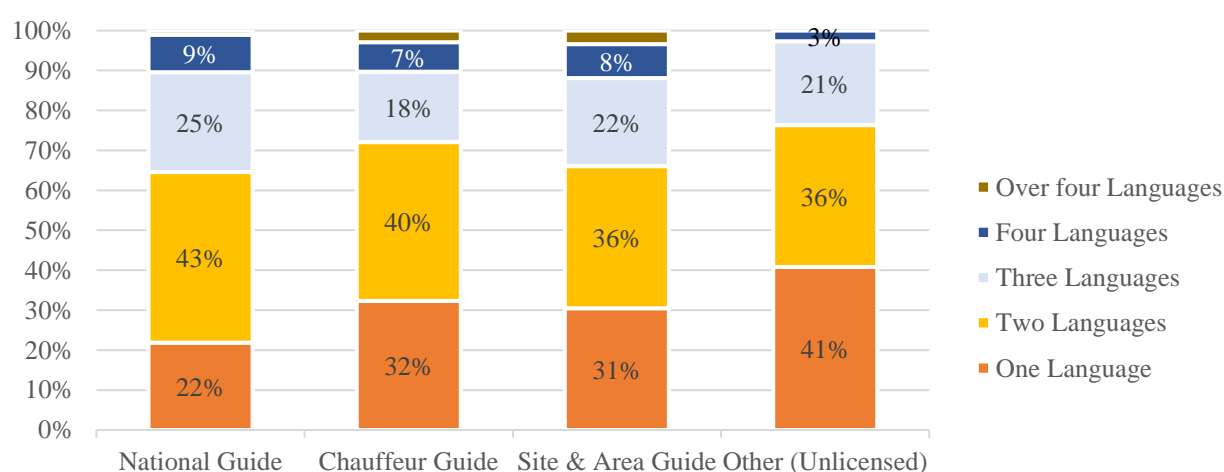


As mentioned earlier, Language skill is the most critical parameter for TGs. Hence, speaking a few languages together will be a specific ability for a TG, and it will be advantageous for that person to create a higher demand for a TG. Hence, the study investigated the multilingual skills of TGs. According to the data, it is visible that 31 percent of

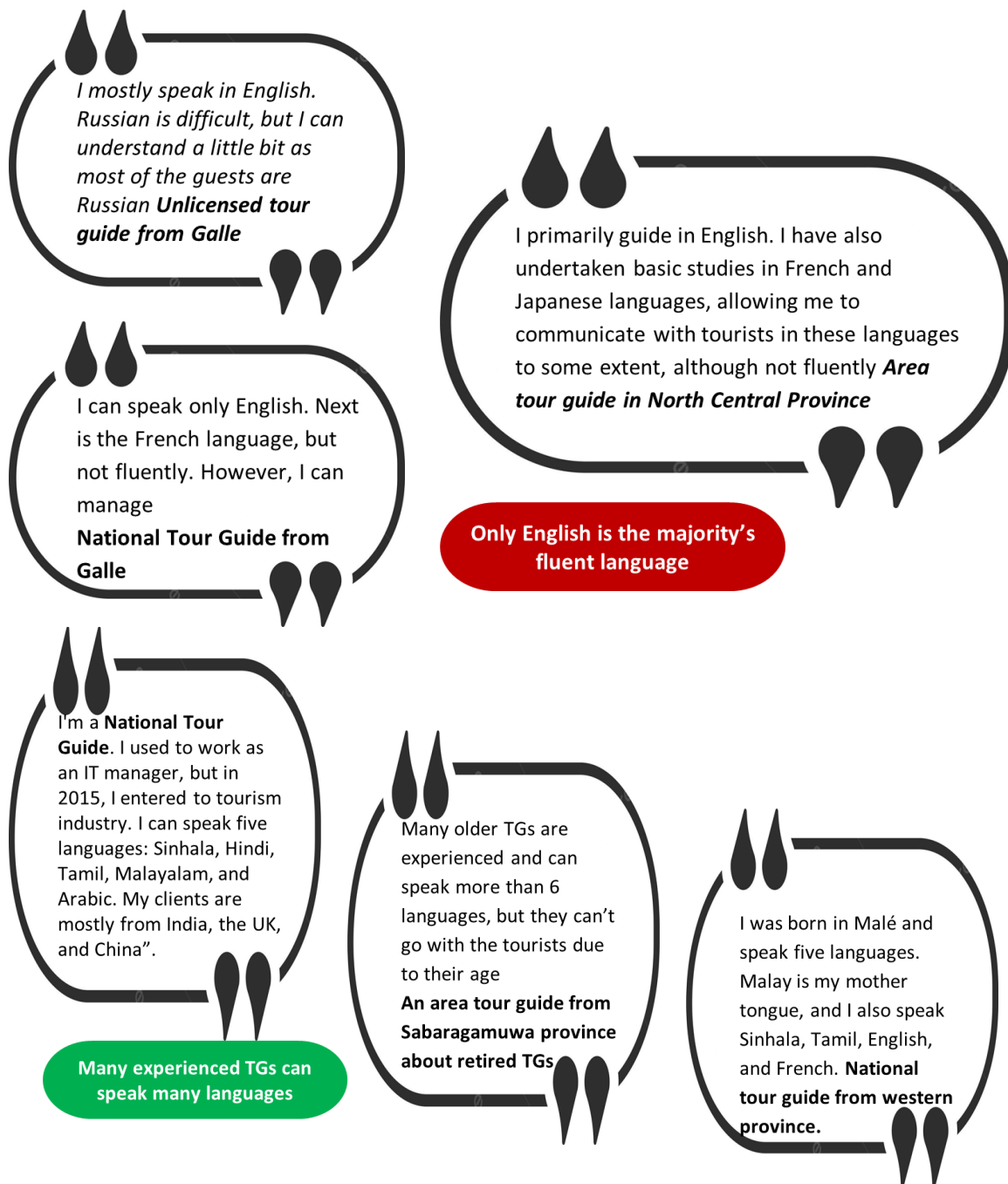
TGs only speak one language, and most of them should speak English. Impressively, nearly 40 percent have stated that they can speak two languages, i.e., English and another foreign language. Twenty-one percent of TGs can speak three languages, and nine percent claimed they can speak four or many languages.

Multilingual ability seems more significant among the National TGs than among others, which is impressive given the effort put into training National TGs. The majority (41%) of Unlicensed TGs can speak one language, i.e., English, and 36 percent have two-language abilities as presented in Figure 29.

Figure 29: Multilingual capabilities of TGs' types



The voices of the TGs who can speak only English and who can speak many languages are presented as follows.



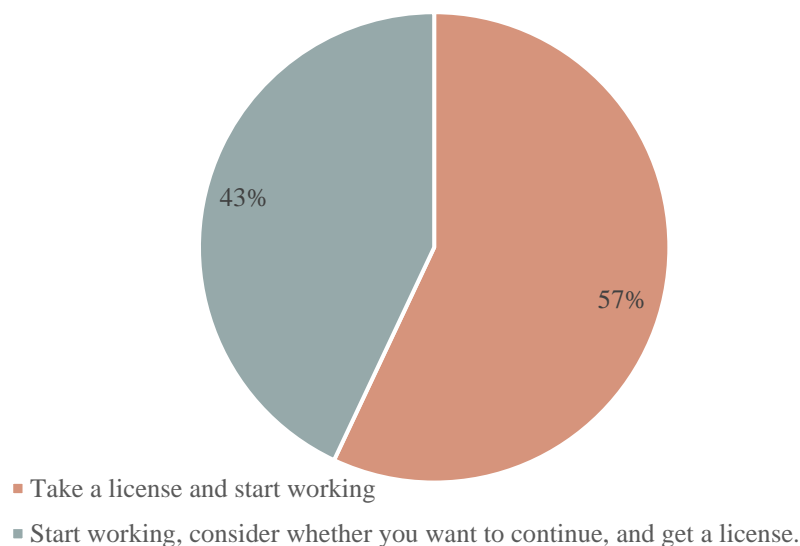
Attitudes Towards Licensing

Nearly half of the TGs surveyed believe it is worth taking a license and starting the job, whereas the other half think it is better to start tour guiding and see whether that fits to continue and then pursue the license-taking process. As per the TGs' experience, obtaining the license to work as a TG earlier was not a necessity. Therefore, some TGs still believe that first practicing and then getting a license if needed is recommended. While the trend is similar among all types of TGs, the majority, like 52 percent of Unlicensed TGs, think that a license is not a mandate to start tour guiding (refer to [Figure 30](#)).

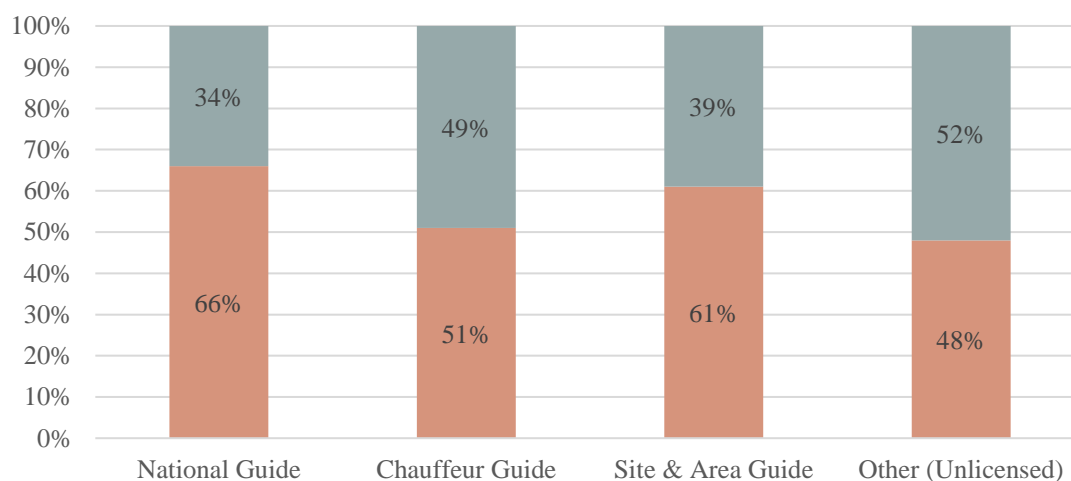
Figure 30: TGs attitude towards licensing

Question: Is it worthwhile to get a license and start working as a TG or to start and then consider whether to continue and get the license?

Survey Sample: 300 TGs



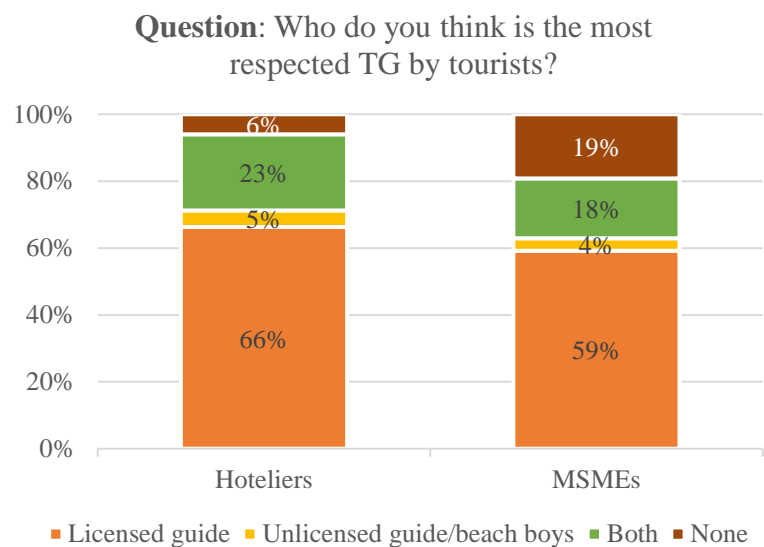
Even Chauffeur guides, nearly half believe that a license can be taken after you start working as a TG (refer to [Figure 31](#)).

Figure 31: TGs attitude towards licensing - Each type

While TGs have the above-discussed belief of having a license or not, only 23 percent of foreigners interviewed have stated that having a license or not would be a decisive factor of a good characteristic of a TG. This means 67 percent of the tourists have not identified it as a decisive factor of a good TG.

Figure 32: Hoteliers' and MSMEs' perception on tourists' respect towards licensed and unlicensed TGs

Further investigation into the attitude of value chain actors toward Licensed and Unlicensed TGs, while the majority believe that Licensed guides are respected by tourists, there is a segment of nearly 20 percent of MSMEs believe that tourists do not believe either licensed or unlicensed guides in Sri Lanka are respected (refer to *Figure 32*) by tourists which is a concerning factors and factor that can drive negative perception about TGs in Sri Lanka.



Chapter Summary 4 : The Current Estimated Size of TGs & their Characteristics

The research findings on the current population and characteristics of TGs in Sri Lanka reveal a diverse and dynamic profession. The industry significantly contributes to the tourism sector's growth with nearly 4,887 registered TGs and an estimated 1,460 unlicensed guides. The demographic profile of TGs is diverse, spanning different age groups and genders. However, there is a significant underrepresentation of female TGs, highlighting the need for initiatives to promote gender diversity within the profession. Further, significantly older TGs would leave the profession after their retirement age with the immense competencies they carry. This suggests proper strategies to be implemented to transfer this knowledge to young TGs by making the older experienced TG trainers or mentors to young TGs. The study also highlights the employment arrangements of TGs, with a substantial majority working as freelancers. This freelance nature provides flexibility but presents challenges such as income instability and job insecurity. The establishment of income stability and job security is crucial as the majority are breadwinners of families, and the livelihood of those families would be largely dependent on the well-being of the TGs' careers. This becomes more important as most TGs, except National TGs, are relatively average education level people, limiting other job opportunities in the market and the lack of transferable knowledge developed within them, making them primarily vulnerable during the off-season. Addressing these challenges is crucial to ensuring a sustainable and supportive environment for TGs. Additionally, the linguistic skills of TGs are vital, with English being universally acknowledged as essential, alongside other languages like Russian, German, French, and Chinese. These language abilities are critical for effectively catering to a diverse range of international tourists, enhancing their experiences in Sri Lanka. Hence, understanding the current landscape and characteristics of TGs is fundamental to formulating strategies that support professional development, job satisfaction, and inclusivity within the tour-guiding profession in Sri Lanka. Addressing the challenges identified and capitalizing on the workforce's strengths will be instrumental in fostering a thriving tourism sector that offers exceptional experiences to tourists visiting Sri Lanka.

4.2. Evaluating the Current Importance and Satisfaction Levels of Tour Guides

Stakeholders Perception about the Importance of Tour Guides

As earlier mentioned, TGs are considered “Unofficial Ambassadors” of the country, and those words emphasize their significance and utmost importance to the tourism industry. Nevertheless, a comprehensive concentration on the perception of other stakeholders regarding TGs is important because the tourism sector is a value chain that consists of all the stakeholders; they depend on each other. Hence, this chapter will provide a deep exploration of other stakeholders' perceptions of the importance of TGs. Different scholars have defined and identified the value of TGs and tour-guiding services in different ways. However, everyone emphasises the importance of the TG service to establish and sustain the image and reputation of the destination and hence how abreast the TG skills should be to meet the evolving needs of the tourist.

“Travel is more accessible and affordable than ever, and the role of the TG is becoming more structured and diverse. With the advent of modern technology and the internet, the role of the TG has been evolving even faster. Tourists are now better informed about the places they visit, and TGs must also keep up with these trends to provide high-calibre, online TG service” (Aboelmagd, 2023; Rabotic, 2009).

“The value in tour guiding comes from the enjoyment afforded to the tourist. The tourists' frame of context of a destination is wholly dependent upon the interpretation of the destination. It is built on the stories and the information, the anecdotes, and the inside local information not available elsewhere” (Haugen, 2022).

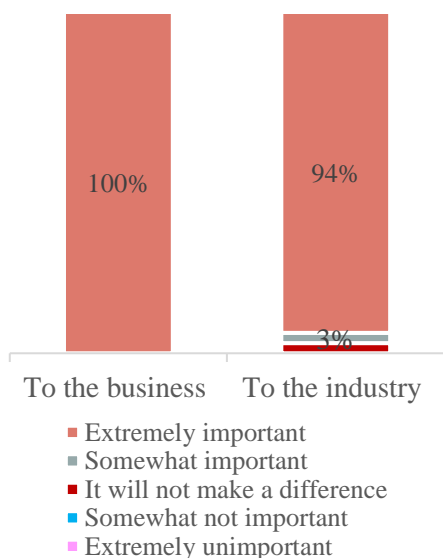
“A trained TG can provide all of these factors and more. If done with knowledge, dedication, and care, it can give a point of value to tourists and positively impact their experience at a destination. TGs can improve the image and reputation of tourist destinations by providing a quality service” (Nejmeddin, 2019).

Answering the question, ‘To what extent do you think TGs are important to your business and industry?’ tour operators, hoteliers, and MSMEs have shared their perspectives (refer to *Figure 33, Figure 34, Figure 35*). Interestingly, the interviewed tour operators (The closest stakeholders to TGs from an employment point of view) stated that TGs are 100 percent important to their business and also very important to the industry (94%). However, the numbers change when it comes to the hoteliers and MSMEs. From hoteliers' point of view, 58 percent mentioned that TGs are extremely important to their business, and 42 percent of MSMEs mentioned that TGs are important to their business. On the other hand, they mentioned TGs are important to the industry from a larger number rather than the importance to their business.

Figure 33: Importance of TGs from tour operators' perspective

Question: To what extent do you think TGs are important to your business & Industry?

Survey Sample: 32 Tour Operators



"TGs are the face of our company and, in a sense, the "unofficial ambassadors" of Sri Lanka"

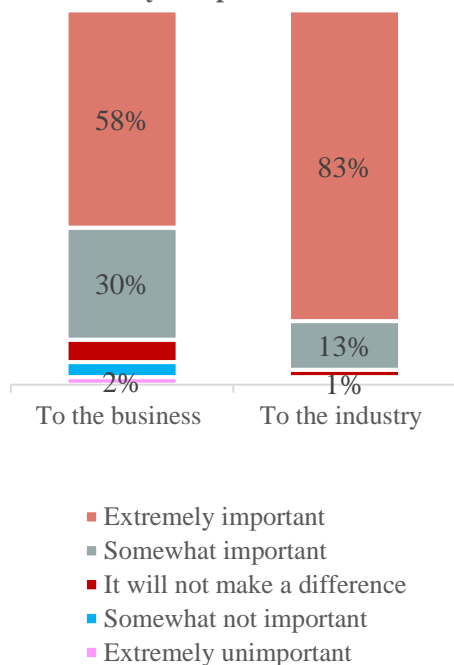
"Although most TGs are freelancers, they still represent the country in the eyes of tourists"

Tour Operators

Figure 34: Importance of TGs from MSMEs' perspective

Question: To what extent do you think TGs are important to your business & Industry?

Survey Sample: 312 MSMEs



Question: To what extent do you think TGs are important to your business & Industry?

Survey Sample: 100 Hoteliers

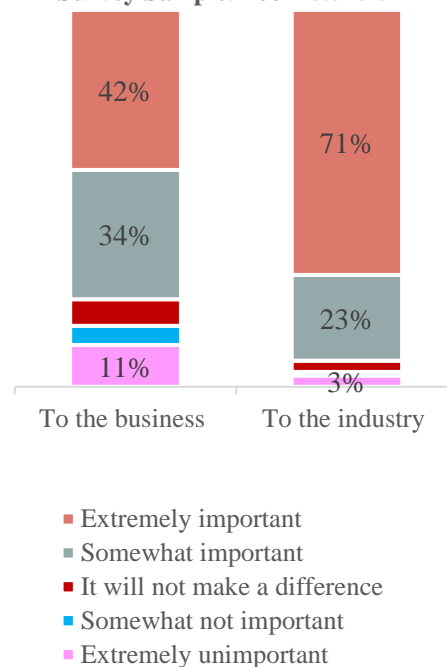
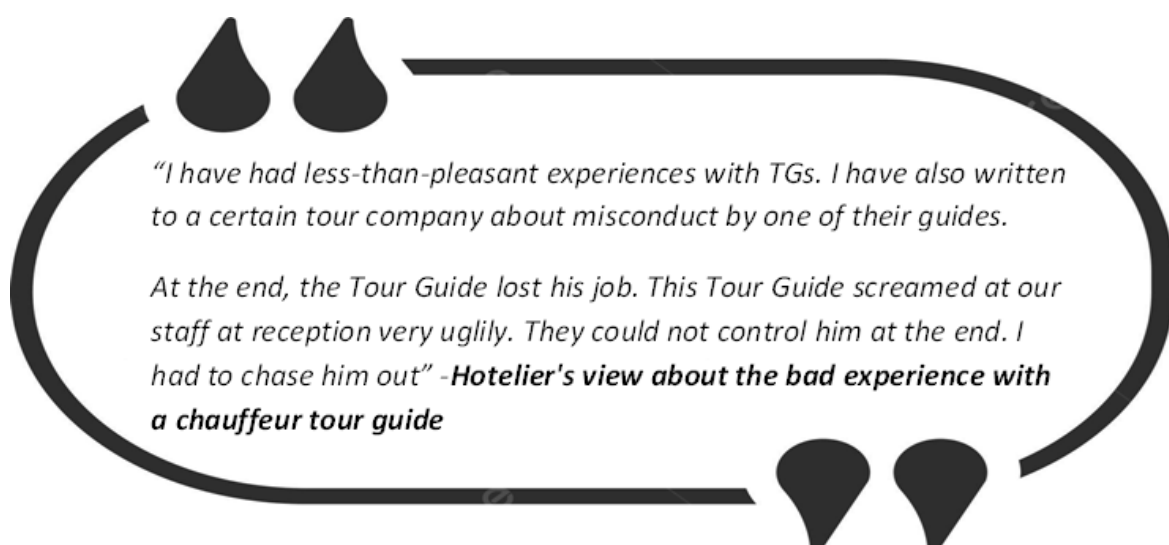


Figure 35: Importance of TGs from hoteliers' perspective

It is concerning that not many hoteliers and MSMEs consider TGs as important stakeholders of their business and hence investigated the reasons causing this situation. Many of the MSMEs are concerned about the lack of fair-trade consciousness when dealing with them as well as their clients (foreigners), as seen in the verbatims of MSMEs interviewed in this study presented below.



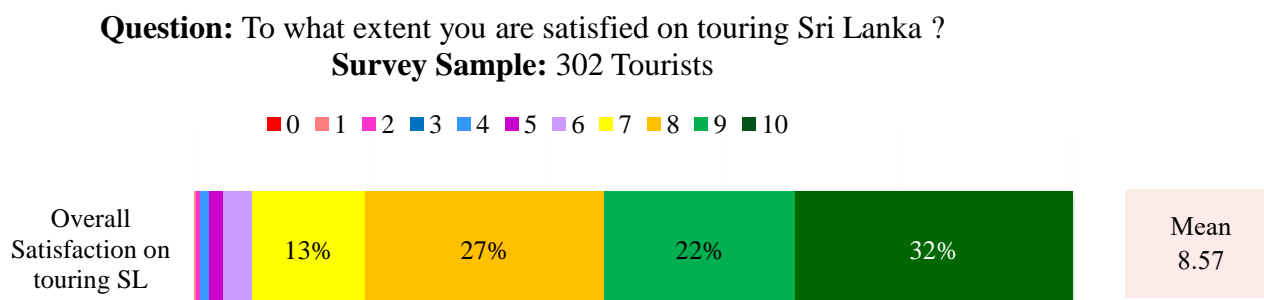
Further, a hotelier has mentioned his disappointment in misconduct and the arrogance of TGs in the industry.



Tourists' Satisfaction and Recommendations for Tour Guides in Sri Lanka

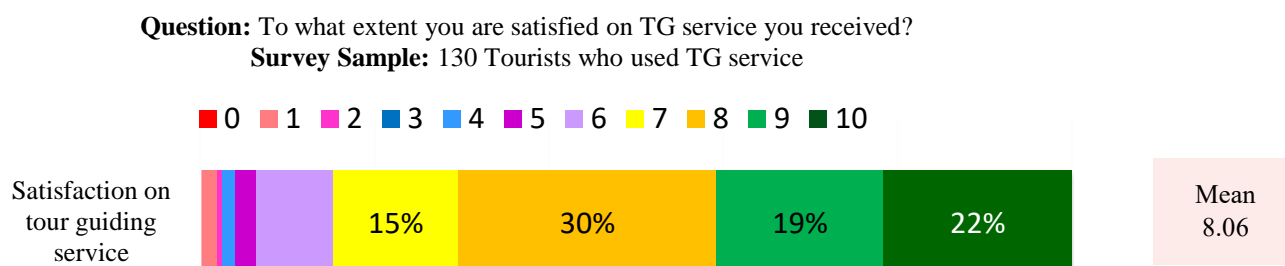
It is encouraging to note that tourists are very satisfied with touring Sri Lanka. 54 percent of tourists seem overwhelmed by their choice of Sri Lanka to travel to this time, with a high mean score (8.57) on a ten-point satisfaction scale as presented in *Figure 36*.

Figure 36: Tourists satisfaction of touring Sri Lanka



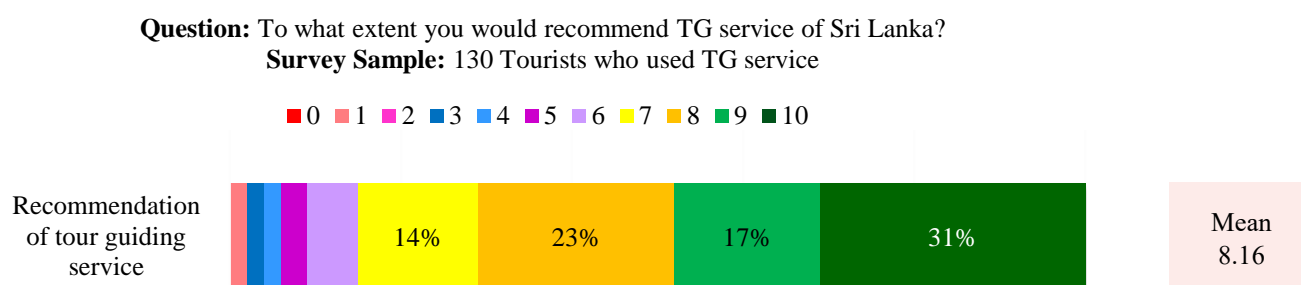
Further, tourists who used TG service expressed high satisfaction, with 41% feeling overwhelmed. The satisfaction mean score on a ten-point scale is 8.06 (refer to *Figure 37*).

Figure 37: Tourists satisfaction of TGs in Sri Lanka



Further, 31 percent of tourists rate their level of recommendation at ten on a ten-point scale, with 10 being a very high recommendation and zero means they do not recommend it at all. Another 17 percent have rated nine, and 23 percent have rated eight, which is very healthy. Forty-eight percent of tourists seem to be promoting Sri Lanka's TG service (refer to *Figure 38*).

Figure 38: Tourists recommendation on TG service

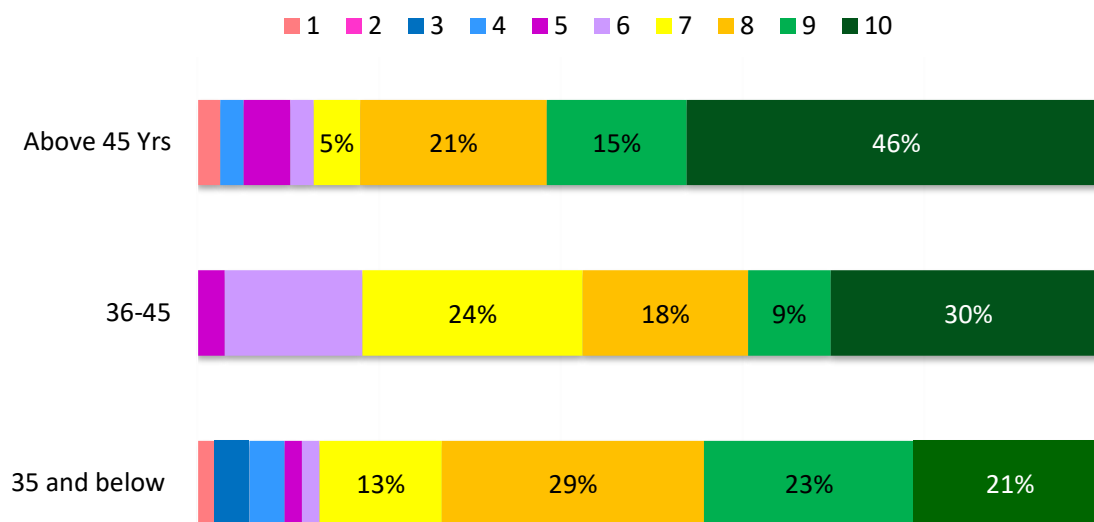


From the perspective of tourists of different age, tourists' recommendations regarding TGs demonstrate varying recommendations across aged tourists. The middle-aged segment of 36-45 seems critical of TG service, whereas younger and older segments seem convinced to recommend TG service to others. A remarkably higher percentage (61%) of older tourists highly recommend TG services in Sri Lanka (refer to [Figure 39](#)).

Figure 39: Tourists recommendation on TG service - by the age of tourist

Question: To what extent you would recommend TG service of Sri Lanka?

Survey Sample: 130 Tourists who used TG service

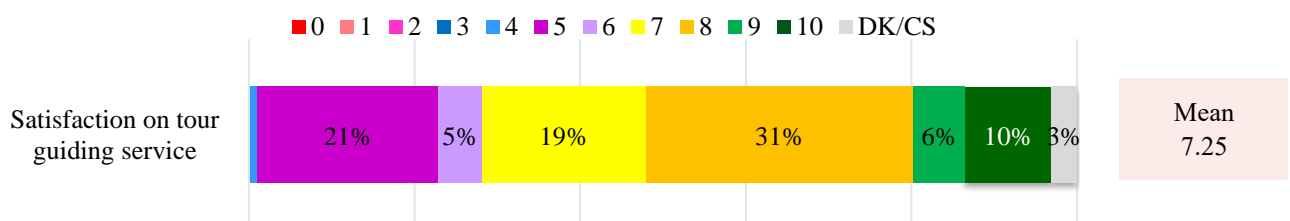


Hoteliers and MSMEs are also important stakeholders who often interact with TGs in their day-to-day business. Therefore, this study also investigated their level of satisfaction with TGs. Accordingly, hoteliers' views about TGs' performance seemed low compared to tourists' recommendations. Based on what they have experienced and observed, only 16 percent are satisfied with the TG services. Therefore, the mean score on a ten-point satisfaction scale was 7.25 (refer to [Figure 40](#)).

Figure 40: Hoteliers' satisfaction of TGs in Sri Lanka

Question: How would you assess the followings?

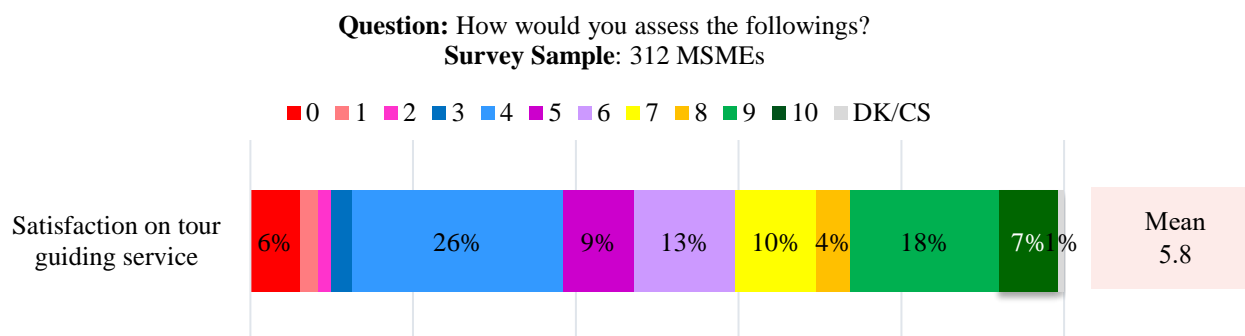
Survey Sample: 100 Hoteliers



More alarming experiences of MSMEs with TGs pose a considerable concern due to some of the research that discussed the lack of fair-trade understanding among the TGs based on the MSMEs'

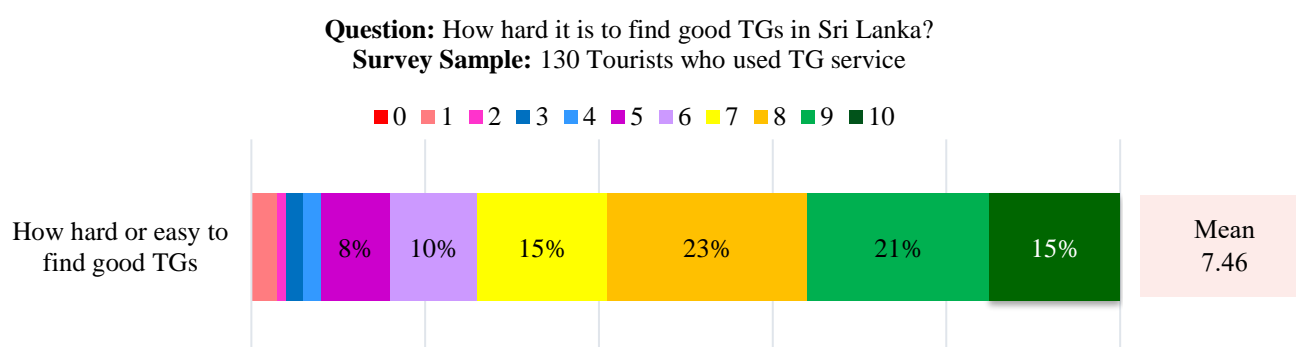
experience. Therefore, the mean satisfaction score on the ten-point scale drops to 5.80, and most people are not so happy about the TG service in Sri Lanka. Nonetheless, 25 percent of MSMEs have positive sentiment on TGs, as shown below (*Figure 41*).

Figure 41: Satisfaction on tour guiding service



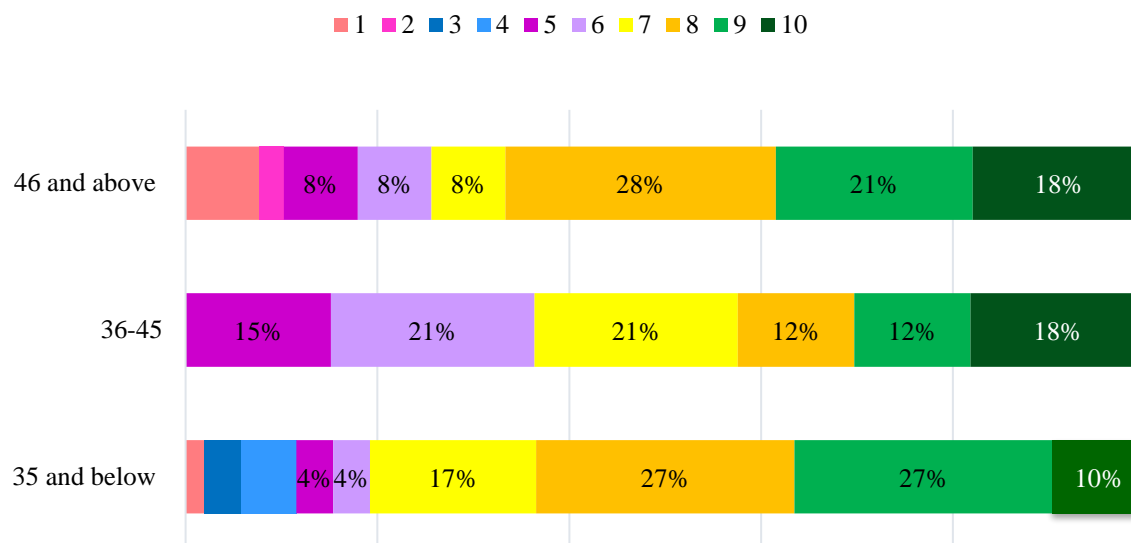
The tourists' satisfaction with the ease of accessing TGs is another essential dimension to understanding how easy it is for tourists to find a TG in Sri Lanka. Accessing TG services could be significantly improved. Among tourists who have utilized TG services, only 59 percent reported having a positive experience finding TGs; the remaining tourists seemed to have encountered difficulties in sourcing TGs when attempting to reach out to them. This indicates that the convenience of finding TGs appears somewhat challenging. Addressing these challenges is crucial to enhancing the accessibility and availability of TG services, ensuring a smoother and more positive experience for all tourists seeking to engage with TGs in Sri Lanka. By improving the visibility and accessibility of TGs through better communication channels and more streamlined booking processes, Sri Lanka can enhance its tourism offerings and improve overall tourist satisfaction.

Figure 42: Tourists satisfaction of ease of accessing TGs



The *Figure 43* below shows that younger and older tourists find TGs more easily than middle-aged tourists. Qualitative discussions revealed the need for a single trusted source for dependable TGs in Sri Lanka, so tourists face hardships when looking for a good TG.

Figure 43: Tourists' Satisfaction with the Ease of Accessing TGs – by Tourists Age



“At the moment, all relevant authorities are maintaining different databases that are not updated and accurate.

Lack of statistics about the availability of TGs in particular areas of the country is a critical consideration for the development of the TGs”

Govt. & Private sector experts.

Further, the study revealed that 22 percent of tourists who took TG services had found TGs from their friends' recommendations. However, the majority, 29 percent, have been recommended TGs by travel agents. 12 percent have received recommendations from local tourism officers (refer to Figure 44). It is essential to realize that 20 percent of the tourists have found their TGs online, which is higher among the younger tourists as per the data presented in the Figure 45).

Figure 44: How do tourists find TGs in Sri Lanka?

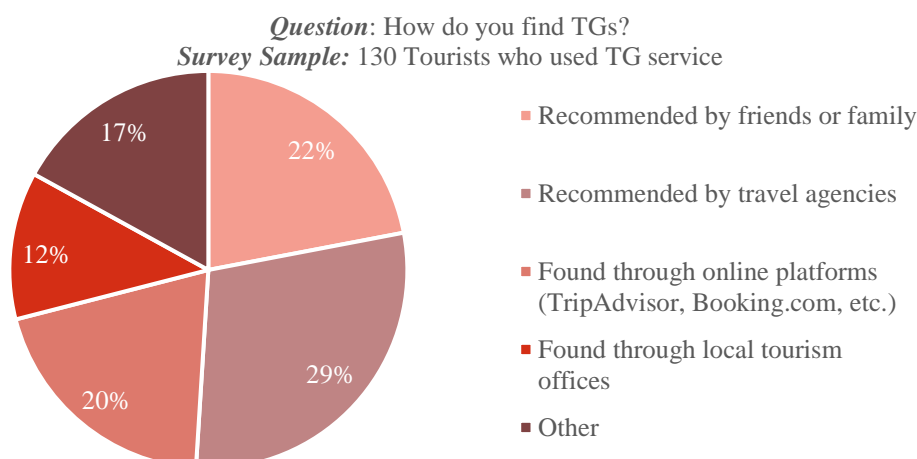
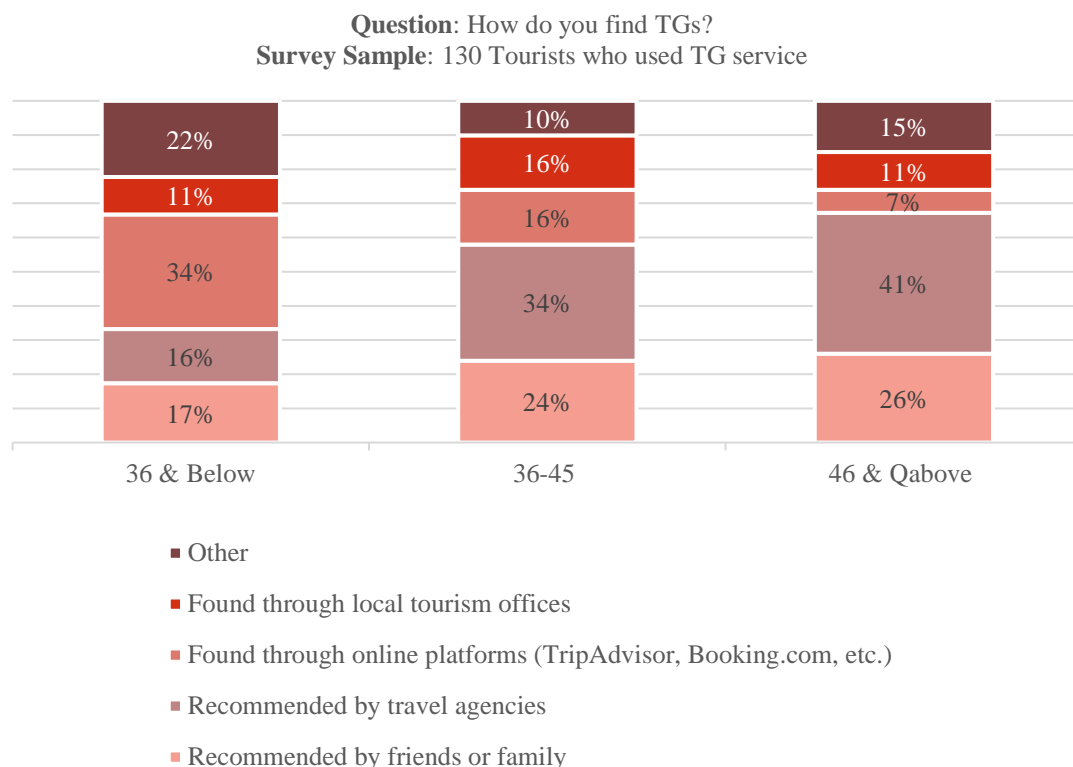


Figure 45: How do tourists find TGs in Sri Lanka? - By the age of tourists



Chapter Summary 5 : Evaluating the Current Importance & Satisfaction Levels of TGs

The literature has proven the significance of the TG profession for the tourism industry worldwide, especially for countries whose primary source of national income is tourism. Similarly, TGs are critical resources for the sustainability and growth of the tourism industry in Sri Lanka. The study data and insight proved it unambiguously. This positive sentiment on TGs can be found among all the key stakeholders, including tour operators, hoteliers, and MSMEs. Even when trying to understand the importance of TGs for the businesses of tour operators, hoteliers, and MSMEs, there was a surprising finding among MSMEs, which shows that MSMEs are not very happy with the TG service. This was mainly driven by the negative experience MSMEs had dealing with TG and seeing how they miscommunicated the prices of the goods to their clients. Further, complex negotiation for commissions by the TGs from MSMEs has shown the need for fair-trade understanding among the TGs. Nevertheless, it is essential to note that the most critical stakeholder group for TG service, tourists, have demonstrated higher satisfaction with the TG service in Sri Lanka. Moreover, most tourists seem overwhelmed by their decision to tour Sri Lanka. Therefore, most of the tourists recommend TG services in Sri Lanka. Tourists' only concern about TGs is the lack of transparent platforms and sources to find dependable TGs in Sri Lanka. Therefore, relevant authorities should be concerned with developing a central database of TGs to maintain the profiles of TGs in the country and market them in suitable touchpoints worldwide.

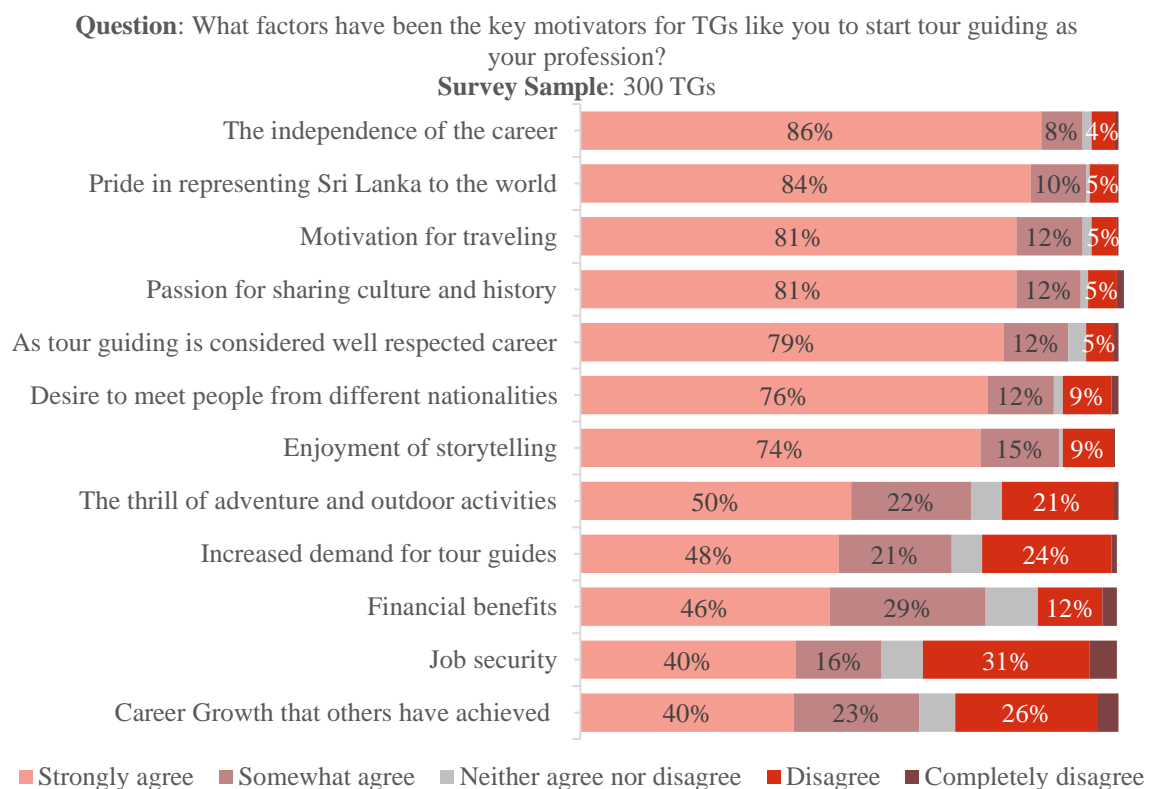
4.3. Motivations and Challenges of Tour Guiding Profession in Sri Lanka

Motivation for Starting Tour Guiding as a Job

The chapter above showcased insights that tour guiding is a primarily accepted profession in Sri Lanka by crucial value chain actors such as tour operators, hoteliers, and MSMEs. Although there are a few heartbreaking incidents related to the misconduct and attitudes of TGs, this chapter aims to discover the motivators and challenges TGs face when engaging in tour guiding in Sri Lanka.

According to the responses of TG to the survey, it is a priority to understand that the critical reason to consider starting tour guiding is the ‘independence’ attached to the job. It is encouraging to observe that TGs promote tour guiding to others due to these factors of the job; ‘pride in representing Sri Lanka,’ ‘opportunity to travel,’ ‘passion for sharing history and culture,’ and ‘the fact that guiding is a respected job’ are the vastly accepted motivator for TGs to be in their profession. Nearly eight of ten TGs strongly acknowledge these factors. Furthermore, the opportunity to ‘meet people from different countries’ and ‘enjoyment gained from storytelling’ are also clear motivators to start tour guiding. Nonetheless, not many TGs selected TG jobs expecting career growth, job security, financial benefits, increased demand, and the opportunity to be involved in outdoor activities at the start of the job. Sometimes, many of the TGs would not have had a license at the beginning of the tour guiding job, as we observed in the discussions in the above chapters. The data below shows (refer to **Error! Reference source not found.**) the factors TGs considered when they started the tour guiding job.

Figure 46: Factors motivated to start tour guiding



Although financial benefits were not considered at the start of the profession, most TGs consider them a motivator to stay on the job continuously. Other than the financial benefits, other motivators discussed above as factors of motivation to start a TG job also apply to TGs to continue in their careers. Additionally, it is crucial to note that having good support from authorities has been an encouraging factor for only one percent of the TGs to continue as TGs in their profession.

Further, it is important to note that not many seem to enjoy performing certain core job tasks, such as storytelling, outdoor activities, and facing unexpected situations (refer to *Figure 47*).

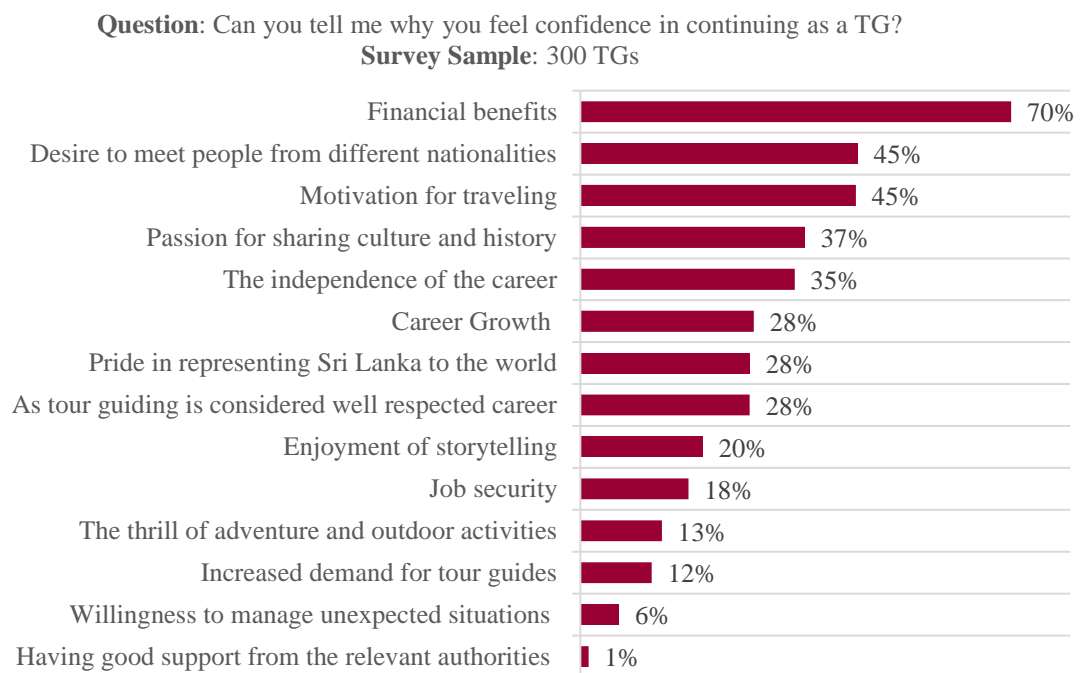


Figure 47: Factors Motivate for Continuing Tour Guiding as a Job

Challenges Faced by Tour Guides

Apart from the motivators discussed above, TGs in Sri Lanka face numerous challenges that dampen their enthusiasm for the profession, as highlighted by qualitative insights from discussions and survey data. Among the pressures and challenges that TGs are facing, the key challenges are presented below.

- The threat of foreigners bringing their guides/ interpreters.
- Competition from unlicensed guides.
- Seasonal impact on the job due to the non-permanent nature of the job.
- Lack of communication from the relevant authority.
- Lack of support and coordination from the relevant authority.
- Limited facilities and accommodation.
- Digital Trends.
- Recognition for the licensed TGs
- Licensing & license renewal process.
- Identity for TGs
- Lack of Continuous professional development of TGs.

The Threat of Foreigners Bringing their Guides/ Interpreters

One of the notable threats to local TGs is the presence of foreign tourists who bring their interpreters or guides from the source market. This practice is common among tourists from countries like Russia and China, where language barriers exist. These foreign interpreters often act as tour leaders, reducing the demand for local TGs. This situation is exacerbated by the lack of regulatory control over this practice, leading to a loss of income and job opportunities for local guides. It also undermines the local tourism industry's efforts to provide authentic cultural experiences guided by knowledgeable locals. Below are quotations regarding threats from foreigners bringing their interpreters, as described by the TGs in Sri Lanka.

"As we don't have native speaking tour guide service in Sri Lanka, it is easy to communicate with the Chinese tour guide. We pay for the Chinese-speaking tour guide (Dao Di) by ourselves. He was appointed by our company specifically to lead. He specifically leads groups to Sri Lanka, doesn't go to other places, and just brings tourists to Sri Lanka"

Chinese tourists about their group interpreter

Lack of Chinese-speaking guides in Sri Lanka, Chinese-speaking leaders come with Chinese tourist groups

National Guides' business is at risk

"Our national TGs are the ones who keep their mouth shut about this incident. Our guides should oppose this. Let's imagine that an interpreter is coming. But that interpreter is the one who leads the tour. There are times when they go on a tour even without a national guide"

National Tour Guide about Chinese Interpreters

"Russians stay here, and they try to give surfing lessons, there are instructors. The Russians staying here for a long time rent houses to Russians. They do all here. The other thing is that they negotiate tours on their own through Telegram, and they guide them on their own. Some Russians are hiring Three-Wheelers here as well. They are completely a threat to our income"

Unlicensed Tour Guide about Russian Interpreters

Russians who live in Sri Lanka assist Russian Tourists travel to Sri Lanka

Competition from Unlicensed Guides

According to licensed TGs' point of view, the presence of unlicensed TGs poses a significant challenge for the tourism industry. These unlicensed guides often offer services at lower prices, undercutting licensed professionals who follow regulatory standards. This affects the livelihood of licensed guides and the quality of service provided to tourists. Unlicensed guides may lack the

necessary training and knowledge, leading to subpar tourist experiences. This situation calls for stricter enforcement of licensing regulations to ensure that only qualified and certified individuals can operate as TGs.

*Disciplines of unlicensed
TGs damage reputation*

“The problem with unlicensed people is that they do not behave with any discipline in front of guests. There are times when three wheelers come with guests and fight in the park. When that happens, the foreigners get scared.”

**National Tour Guide about unlicensed
TGs**

*Lack of training for
unlicensed TGs risks the
quality*

“The unlicensed guides ask for training, but how can we effectively impart such deep knowledge to unlicensed people, who would not be able to grasp and make use of it well”

**National Tour Guide about Unlicensed
Tour Guide'**

Seasonal Impact on the Job due to the Non-permanent Nature of the Job.

The most concerning factors for TGs include the impact of the off-season on their income. Seasonal variation in tourism significantly affects the job stability of TGs. During peak seasons, the demand for TGs is high, providing ample employment opportunities. However, in off-peak seasons, the demand drops, leading to reduced work and income insecurity. This cyclical nature of tourism can make it challenging for TGs to sustain a stable livelihood throughout the year. Therefore, sometimes, TGs use peak season to optimize their income to compensate for the off-season's survival. This could be one of the reasons for their desperate approach to earning money through commissions.

However, from the TGs perspective, some interventions are required to facilitate TGs during the off-season. Some TGs suggest increasing the fee during peak season, and some suggest arranging concessions during the off-season. However, TGs servicing Chinese tourists seem to enjoy the income stream throughout the year, as some tour operators claim. Similarly, developing strategies to attract other tourists during off-peak periods is crucial. Further, diversifying TGs' skill sets to engage in other tourism-related activities during off season can help mitigate this vulnerability. The quotations from qualitative discussions below provided evidence to show the TGs' concern about off-season struggle.

Inconsistent Tourism season impacts income

"There are many tourists now. But we don't know how it will be during the next off-season. We need to gather food in this season to survive in the off-season.

We cannot predict the next three months now. In that period, we cannot do tour guiding.

Government should do something about this"

Area tour guide about the seasonal variation.

"The problem is that those working as freelancers are working through the travel agents anyway. Then the travel agents will not give a monthly salary because this is not a permanent job.

Therefore, it would be precious if we could increase the guide fee during the season.

Also, it would be good if they arranged to provide something during the off-season.

A National Tour Guide

Chinese Tourists come most of the year, but other TGs' jobs are at risk in the off-season

"The main issue that TGs face in this industry is seasonal variation. In the off-season, less income impacts TGs and others. However, unlike the European market, Chinese tourism has no off-season. It's my responsibility to secure tours during the off-season as well.

This is a significant challenge, but it's part of the business."

A tour operator who is operating in the Chinese market.

Lack of Support, Communication, and Coordination from the Relevant Authority

The TGs often navigate a complex and dynamic industry, yet they face significant challenges due to the need for more structured support, coordination, and effective communication from relevant authorities. This absence of support can lead to numerous operational difficulties that hinder their ability to deliver high-quality services to tourists. One of the primary issues is the lack of timely updates on new regulations and policies. TGs must be informed about changes in tourism laws, safety protocols, and entry requirements to provide accurate and current information to their clients. However, communication from authorities is often sporadic and inefficient, leaving TGs in the dark about critical updates. This gap can result in misunderstandings, compliance issues, and a decline in the overall tourist experience.

The impact of these challenges is reflected in the voices of TGs gathered at the interviews. Many express frustrations over the lack of support and feeling neglected by authorities. One TG mentioned, *"We often learn about new regulations through our clients rather than through official channels. It makes us look unprofessional."*

Further, as discussed above, value chain actors in the industry believe that authorities should take some action regarding the invasion of foreign interpreters into the country. *"Russian and Chinese bring their country's TGs, known as "Tour Leaders." In Sri Lanka, many in the industry refer to these guides as "Interpreters." Often, these tourists travel with their leaders and may not hire a local guide due to language barriers. There is no control for these things imposed by the authority."*

In the same way, licensed TGs face challenges from unlicensed TGs. Therefore, licensed TG expects the attention of authority to control the situation. *“The presence of unlicensed guides, who may offer lower prices or operate outside regulatory frameworks, threatens licensed TGs' livelihoods and professional standards”.*

Moreover, the lack of coordination extends to missed training opportunities. Continuous professional development is essential for TGs to stay competitive and knowledgeable about new trends and best practices in the tourism industry. Unfortunately, many guides report that they are not informed about available training programs or workshops, which limits their ability to enhance their skills and service offerings. This deficiency affects their professional growth and impacts the quality of services provided to tourists. Access to necessary resources is another significant challenge. TGs often require various tools and materials, such as maps, brochures, and access to historical archives, to enrich their tours. However, the support from authorities in providing these resources is frequently inadequate. TGs struggle to deliver informative and engaging experiences without the necessary materials, which can diminish tourist satisfaction and repeat business.

Effective coordination and communication from relevant authorities are essential for ensuring that TGs are well-informed about events, tourism policies, and other critical information that can enhance their service delivery. For instance, awareness of local festivals, public transportation changes, or new attractions can enable TGs to plan better and provide more comprehensive services. When such information is not readily available or communicated late, it hampers the TGs' ability to adapt and offer an optimal experience.

A guide highlighted a missed important event: *“There has been an "Angampora" [A Sri Lankan traditional martial art] event on the western side of Ruwanweli Seya [A pagoda]. It has been well organized but went unnoticed due to lack of coordination and communication by the authorities. There are many programs we could benefit from, but we rarely get information about them. We need more proactive communication from the authorities.”- Chauffeur TGs.*

The consequences of these challenges are far-reaching. TGs may struggle with job performance without proper support and communication, decreasing service quality and tourist satisfaction. This affects their livelihoods and has broader implications for the tourism industry's reputation and sustainability.

Limited Facilities and Accommodation.

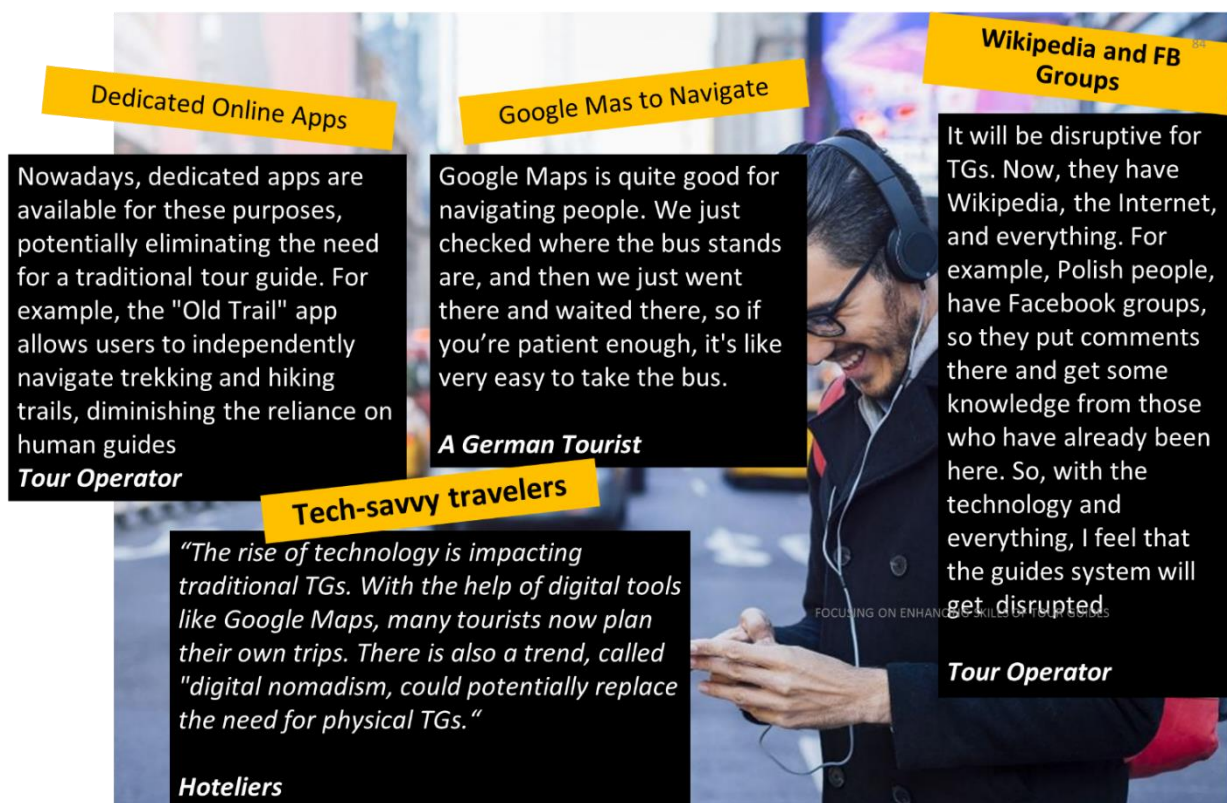
TGs often face inadequate facilities and accommodation challenges, particularly when traveling with clients. Limited access to comfortable and affordable lodging can affect their ability to provide high-quality services. Some of the TGs' disappointing voices on the facilities they have when working in the field are as follows:

Additionally, insufficient facilities at tourist sites, such as restrooms, dining options, and transportation, can impact the overall tourist experience. Addressing these infrastructure issues is crucial for ensuring that TGs can perform their duties effectively and provide tourists a seamless and enjoyable experience.



Digital Trends

The rise of digital tools and technologies has brought about significant changes in the tourism industry. Many tourists now use digital platforms like Google Maps, travel blogs, and mobile apps to plan their trips, potentially reducing the demand for traditional TGs. To stay relevant, TGs must embrace digital tools and integrate them into their services, offering value-added experiences that technology cannot replicate alone. Below are some of the verbatims of different stakeholders about the digital impact on tour guiding services.



Impact of Digital Nomadism on Tour Guiding Services

Digital nomadism, characterized by individuals working remotely while travelling, is becoming increasingly popular. This trend can influence the future demand for TGs, as digital nomads often prefer flexible, self-guided travel experiences. TGs may need to adapt by offering more personalized and niche services that cater to the unique needs of digital nomads, such as remote work-friendly tours and local networking opportunities. Embracing technology and digital platforms to reach this new demographic will be crucial for the sustainability of the TG profession. The following definition of the “**Digital Nomadism**” would provide a better understanding of it’s nature.

“Digital nomadism is a lifestyle where one leverages remote work to travel and live in varying, often affordable locations around the world — has been steadily on the rise, attracting not only tech-savvy workers but everyone from families with children to retirees. In one survey, over 17 million American workers identified as digital nomads, an increase of 131 percent from 2019, and they included workers from a wide array of professions. This rise has also been fuelled by the ease of obtaining digital nomad visas in many countries, post-pandemic.” - Harvard Business Review website

This remote work lifestyle allows them to travel and live in various global locations, potentially decreasing the future demand for TGs. Recognizing this trend is essential, and there should be a

reconsideration of providing special facilities for digital nomads and further investigation into positioning TGs within these evolving trends.



"One thing that's becoming popular is digital nomadism. A lot of people now work remotely and travel at the same time. We also did the same thing when we stayed in Sri Lanka in this time.

So, I have created some articles mentioning some important details about our staying in Sri Lanka in a blog , wait I will show you.



This includes all the things including prices, accommodation, natural views, details of beaches especially in Weligama, Mirissa area where we stayed few days"

USA Tourists who came to Sri Lanka as a digital nomad.

Identity for Tour Guides and Recognition for the Licensed Tour Guides

After COVID-19, the requirements of travellers changed. Preferences and needs changed to adapt to a world post-pandemic, a world that had become more technologically abled. More services and products are online, and the advent of AI in all areas of life means that travellers have access to more information and services than ever before. Travellers are seeking authentic experiences, and community-based. *are the unofficial ambassadors of a country*". The image a TG presents to tourists is the image that will be remembered at the end of their holiday. One way to leverage this is always to have the brand identity of the profession visible, like a badge or a uniform, but going beyond that to provide an identity that will become synonymous with Sri Lankan TGs. According to Liu et al (2021) a strong brand can boost the purchase intentions of tourists. Therefore, the status of the TG must be promoted as a desirable commodity of the overall tourism product, both to potential tourists and within the local tourism community.

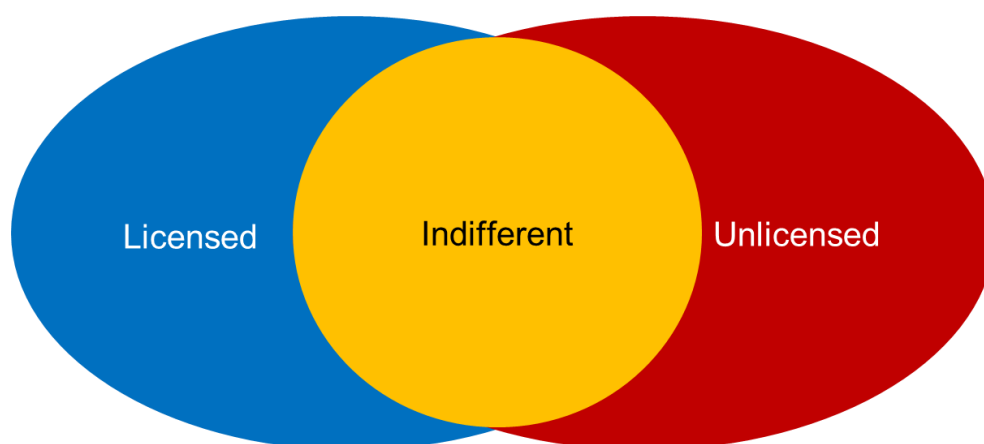
No such brand identity is currently available for TGs in Sri Lanka. Therefore, TGs are largely unseen in the tourism value chain. Their overall value is mostly unremarked upon and goes unnoticed, although they are a focal point of interaction between tourists and other value chain actors, including local communities. Identity branding, however, is not solely dependent upon uniform or dress code. For instance, in Sri Lanka, licensed TGs are provided with documentation providing their status. This is an elementary form of identity branding, but it needs to provide a tangible brand to which visitors can relate. It would be hard to filter the best and worst TGs in Sri Lanka right now due to the lack of a proper system. TG license is the only formal identity given to TGs in Sri Lanka. Does licensing alone elevate the identity of TGs?. Examples of good identity branding can be found in different parts of the world, one of the most prominent being that of the Blue Badge tourist guide in the United Kingdom. The 'Blue Badge' has become a sought-after symbol for those in the tour guiding profession in the United Kingdom.

Another point for identity branding is in the way the identity of the TG is presented. Tour companies and operators will promote their services and that of the TGs. They might even have dedicated websites for this. However, having a cohesive brand identity that is easily recognizable even on a website is essential in the modern day as many tourists are self-sufficient and will investigate their trip details. It is not enough to merely have the names and pictures of the TGs available (Sri Lanka Travel, n.d.-b); the website also needs to appeal to visitors. They need to have a sense of connection with the concept of TGs so that they can obtain the services of one with assurance. As per Nguyen (2015), *“Organizations should attempt to go beyond simply satisfying customers and build customer loyalty.”* By building an identifiable brand around the TG profession, there is a focal point to which customer loyalty can be tied.

There is a lot of emphasis on licenses and the recognition of licensed and unlicensed guides. Recognition and respect for licensed TGs are crucial for maintaining professional standards in the tourism industry. Licensed guides undergo rigorous training and certification processes to ensure they can provide knowledgeable and high-quality services. However, the presence of unlicensed guides and a lack of public awareness about the importance of licensing can undermine their efforts. Enhancing the recognition and visibility of licensed guides through public awareness campaigns and stricter enforcement of licensing regulations can help elevate the profession's status and ensure that tourists receive the best possible guidance. Nonetheless, a fundamental argument exists about the license's purpose if even the Tourist Police cannot refer to it in an emergency.

“While there are licensing requirements for TGs, the tourist police do not possess adequate powers to check the TG licenses. What is the purpose of having the license?” - Private Sector Experts

Tour Operators are a key stakeholder group in the employment of TGs in the country. Therefore, their perspective on TGs is critical in their career progression. However, the study revealed that tour operators have mixed feelings about licensed TGs. Some believe that licensed TGs are the most vital segment, whereas others do not trust or value licensed TGs at all. There is another segment of tour operators who have indifferent views on licensed and unlicensed TGs.



“

The first requirement is a license, that's crucial. The next important factor is language proficiency. I'm very careful about these areas when choosing guides for my company. We have eight National TGs, all of them are licensed”

A Large Tour Operator

”

“

We need to have licensed TGs. SLTDA license is definitely required.

Apart from that, we also look at service letters to clarify their experience. If they have language skills, that's even better.

A Large Tour Operator

”

Some Tour Operators are keen hiring licensed TGs

“

I am satisfied with the tour guide training program conducted by the government.

I have friends who are currently enrolled in this course, and they are having a good knowledge about every aspect in tourism and regarding archeology, history and nature.

We are aiming to hire the national tour guide who got the license by SLTDA.

For short tours, we do not provide a national tour guide, instead, we provide a chauffeur guide.

Small scale tour operator

”

Some Tour Operators resist hiring licensed TGs

“I worked for a leading tour-operating organization in Sri Lanka for a long time, and I’ve noticed that licensed TGs often aim to get maximum commissions from tourists. To earn commissions, they tend to guide tourists to their preferred businesses, like gem shops or restaurants.

Because of this, I don't have any licensed TGs. Using licensed TGs seems pointless.

If my TGs can provide the best service, why should I hire licensed TGs?”

Large-scale Tour Operator

“We don't usually consider licensed guides. Licensed TGs tend to be arrogant, thinking they're the best-educated and most qualified. They aren't humble. Working with them isn't suitable for my organization. Most people who work with me don't have a license, and I don't care about the license either.

A Small-scale Tour Operator”

“When we hire TGs for our company, we consider several factors, including whether they have a valid chauffeur guide or national guide license and the condition of their vehicles.

Nowadays, it is a very professional job, and many people from various industries have joined the tourism sector after having other careers. They may not have a tour guide license, but their language skills and overall competence are very high, which is why they work with us.

Additionally, we provide training programs for our TGs. Even if they don't have a tourist license, we hire them if they have many qualifications and talents”

Large-scale Tour Operator

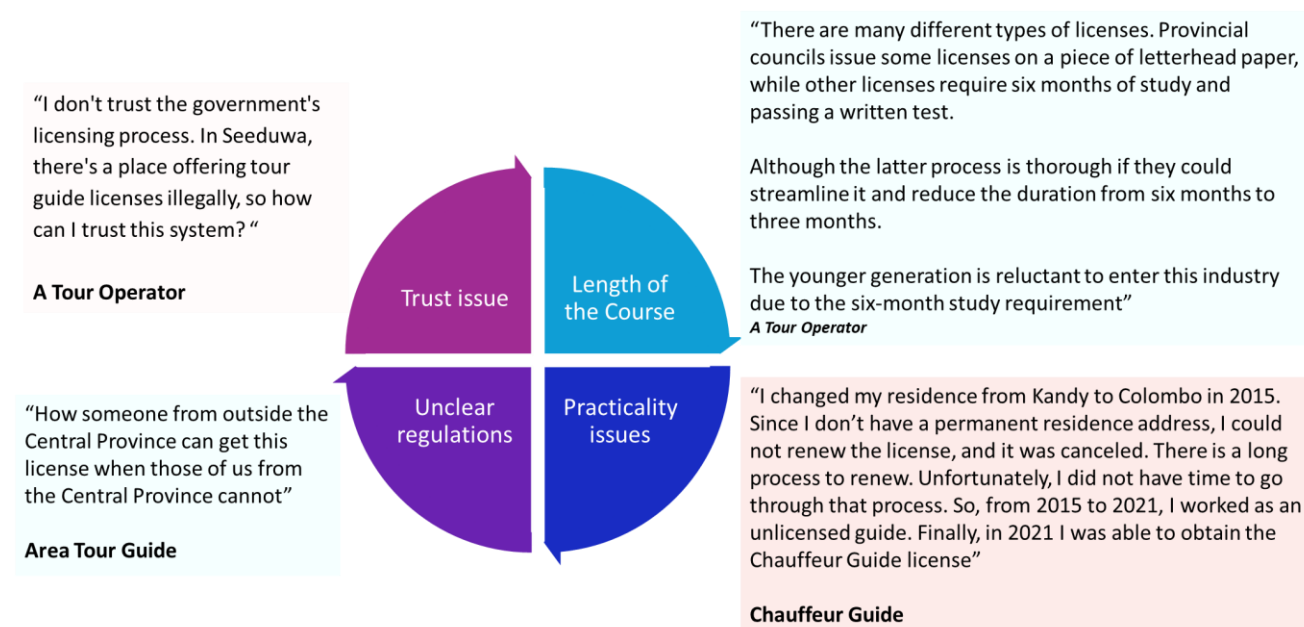
Some Tour Operators are indifferent about licensed/unlicensed TGs

Challenges of the Licensing Process

Challenges faced in terms of the licensing process by TGs and the mediocre level perception other stakeholders have in the license and license renewal process shape the attitude and eagerness of the TGs to take a license. Trust issues of the license issuing process as there are some incidents reported of having illegal license issuing places in the country, duration of the courses, six months, that a TG should go through to take a license is considered as a longer time, loopholes in the regulations about the licensing process having different treatment for different people when issuing licenses, and practical difficulties TGs should go through when taking or renewing a license such as when changing the residence there is no smooth process of renewing

the license to work in a different province are some of the insights found in the study have created a negative perception about the licensing process among the TGs and other stakeholders. Below are some of the quotations from the value chain actors on the licensing process.

Figure 48: Challenges faced in the process of taking or renewing the TG license



Further, the license renewal process is perceived as a cumbersome process and also requires unnecessary documents such as police reports, etc. which is considered as a treatment for well-trained qualified TGs.

"Every two years, we must get a police report. We find this very unfair because we have been qualified, tested by the facility, you know, and we can't understand why the police report? It is silly. I mean, it's treating us as criminals. You know, we feel very distressed and insulted. If they ask the police to report once in five years, that is understandable." - **Industrial expert talking about the license renewal process**

Tour Guiding Licensing Processes in Other Countries

Tour guiding is crucial in the tourism industry, ensuring visitors receive informative and enjoyable experiences. Countries have varying requirements for becoming a licensed TG, reflecting their unique cultural and regulatory environments. This chapter outlines the TG licensing processes in some of the world's top tourism destinations, providing a comprehensive overview of the requirements and standards aspiring guides must meet.

New Zealand



New Zealand's approach to TG licensing differs from many countries as it does not have a mandatory national licensing requirement. Instead, regulations are determined by specific locations, particularly those of cultural or environmental importance. For instance, guiding within national parks like Tongariro often requires permits, and tours involving Māori culture necessitate recognition from local iwi (People) to ensure cultural sensitivity. Additionally, while not obligatory, obtaining a Qualmark (the tourism industry's official quality assurance organization in New Zealand) endorsement can enhance a guide's credibility and professionalism by meeting high standards in knowledge, safety, and customer service. Thus, New Zealand's system emphasizes local regulations and voluntary endorsements to ensure quality and professionalism in tour guiding.

United Kingdom



The UK boasts a well-established, three-tiered system for TG qualifications, ensuring a high standard of professionalism and expertise within the industry. The prestigious Blue Badge signifies the highest level of qualification, requiring extensive training and rigorous national examinations to demonstrate comprehensive knowledge of British history, culture, and contemporary society, enabling guides to operate throughout the UK. The Green Badge denotes regional expertise, allowing guides to offer in-depth knowledge and insights specific to a particular area. The White Badge is site-specific, certifying guides for individual historic buildings, museums, or landmarks, ensuring specialized knowledge of those locations. Additionally, many TGs join professional associations such as the Institute of Tourist Guiding and the Guild of Registered Tourist Guides, reflecting their commitment to maintaining high professional standards and ongoing development. These organizations help guides stay current with the latest information and best practices, ensuring that visitors receive accurate and enriching experiences.

Australia



In Australia, TG licensing operates without a centralized national system, varying significantly across states and territories. For instance, Tasmania mandates specific permits for guides conducting tours in national parks, emphasizing conservation of natural heritage. While national licensing is absent, many guides opt for voluntary accreditation programs like the Australian Tourism Accreditation Program (ATAP) and Eco Guide certification from Ecotourism Australia. These programs ensure adherence to high standards in customer service, safety, and environmental responsibility. ATAP covers various aspects of professionalism and quality assurance in tourism, while Eco Guide certification focuses on sustainability and eco-tourism best practices. Despite decentralized regulation, this approach accommodates Australia's diverse landscapes and tourism needs, maintaining high standards expected by both domestic and

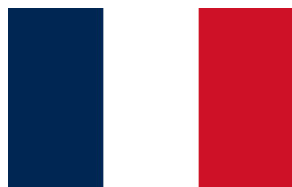
international visitors. Thus, while lacking a national license, voluntary accreditations and state-specific regulations collectively uphold Australia's tour guiding quality and credibility.

Thailand



In Thailand, tour guiding regulations operate under a complex framework focused on business licenses for tour operators, overseen by the Tourism Authority of Thailand (TAT). This licensing applies to entire businesses rather than individual guides, allowing licensed operators to conduct tours nationwide. Aspiring guides can bolster their professionalism by completing government-approved training programs, typically offered by institutions like the Thailand Tourist Guide Association (TTGA). These programs cover essential skills such as local culture, history, and language proficiency, ensuring guides meet high standards in service delivery. The TTGA plays a crucial role in promoting these standards and fostering professionalism within Thailand's tour-guiding industry, despite the absence of a centralized national licensing system for individual guides.

France



In France, tour guiding is tightly regulated, with a mandatory requirement for guides to hold a professional card called the "Carte Professionnelle de Guide-Conférencier" (Professional Tour Guide Card) issued by the regional prefecture (administration office issuing identity cards). This card signifies a high level of professionalism and certifies that guides have completed extensive training and certification. Prospective guides typically pursue degrees or certifications in fields such as Art History, Archaeology, or Tourism, followed by practical internships. Fluency in multiple languages is often mandatory, particularly in major tourist hubs like Paris and the French Riviera, ensuring guides can effectively engage with diverse groups of visitors and provide comprehensive cultural and historical insights.

Italy



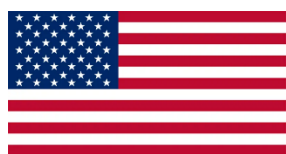
Italy's TG licensing system is decentralized, managed at the regional level to accommodate its diverse cultural heritage and administrative structure. Prospective guides must successfully pass a qualifying examination administered by the region where they plan to work. These exams rigorously assess knowledge of local history, culture, art, and geography, ensuring guides possess in-depth expertise specific to their operating region. Typically, candidates are also expected to hold a degree in relevant fields such as History, Art History, or Archaeology. Once licensed, guides are required to participate in ongoing professional development to stay abreast of developments and maintain their qualifications. This commitment to continuous learning is crucial in Italy, which is celebrated for its extensive historical and cultural sites that demand knowledgeable and skilled guides.

Japan



In Japan, TGs must obtain a license by passing the National Guide-Interpreter exam administered by the Japan National Tourism Organization. This exam evaluates candidates on their language proficiency, typically in English, as well as their comprehensive knowledge of Japanese culture, history, and geography. Fluency in a foreign language is mandatory due to Japan's significant international tourism. The rigorous examination process ensures that licensed guides are well-prepared to deliver informative and engaging tours to visitors. Moreover, guides are encouraged to participate in continuing professional development programs to continuously enhance their skills and knowledge. This commitment to ongoing education contributes to maintaining high standards in the profession and ensures an enriching experience for tourists exploring Japan.

United States



In the United States, there is no national licensing requirement for TGs, resulting in varying regulations across states and cities. Certain cities like New York City and Washington, D.C., mandate TGs to pass local licensing exams. These exams typically assess knowledge of local history, landmarks, and regulations to ensure guides are well-versed in the areas they operate. While not obligatory nationwide, joining professional associations like the National Federation of Tourist Guide Associations (NFTGA) can bolster a guide's credibility. These associations offer opportunities for professional development and networking, fostering industry standards and promoting best practices among guides across the country.

South Korea



In South Korea, TGs are regulated under a national licensing system overseen by the Ministry of Culture, Sports and Tourism (MCST). To obtain a license, applicants, who must be South Korean citizens or hold a valid work permit, are required to possess at least a bachelor's degree, preferably in fields such as Korean Studies or International Studies, and pass a National TG qualification exam administered by the MCST. This exam covers essential topics, including Korean history, tourism laws, and tourism studies, with additional practical training sometimes required. The licensing system offers several categories: the General Tour Guide License for nationwide tours, the Specialized TG License for specific areas like De Militarized Zone¹ tours (DMZ tours), and the Foreign Language TG License, which mandates fluency in a foreign language. Holding a Guiding License signifies a guide's competence and adherence to MCST standards, ensuring tourists receive well-informed and regulated experiences across South Korea. Detailed information on the application process and exam specifics can be found through the MCST and the Korea Tourism Organization, primarily in Korean.

¹ DMZ is a weapons-free buffer zone between North and South Korea.

India



In India, there is no centralized national licensing mechanism for TGs, making it optional rather than mandatory to obtain a license to work nationwide. However, the Ministry of Tourism offers the Regional Level Tourist Guides (RLG) program as a voluntary certification. This program involves completing a Ministry-approved training course and passing written and practical exams to demonstrate proficiency in guiding tourists. Participating in the RLG program enhances a guide's credibility by ensuring they possess the necessary knowledge and skills to offer informative and enjoyable experiences. This certification allows guides to distinguish themselves in the competitive tourism industry and gain recognition for their expertise. Aspiring guides in India are encouraged to explore such voluntary certifications to strengthen their professional credentials and meet the expectations of tourists seeking well-informed and engaging experiences.

The licensing requirements for TGs vary across different countries, reflecting their unique regulatory environments and cultural priorities. These processes ensure that TGs are well-equipped to provide informative, engaging, and safe tourist experiences, whether through rigorous national exams, regional certifications, or voluntary accreditations. Aspiring TGs should familiarize themselves with the specific requirements of their desired destination and seek relevant training and certifications to enhance their professional standing.

As mentioned earlier, there are many countries which have specific licensing processes, and some countries without a proper licensing process (refer to).

Figure 49: Countries with and without licensing process



Comparative Analysis of Tourist Guide Licensing Mechanisms: Sri Lanka vs. Global Practices

In examining Sri Lanka's distinctive Tourist Guide licensing framework alongside global standards, it becomes evident that Sri Lanka's approach stands out for its specialized categories tailored to diverse tourism roles. Sri Lanka offers a comprehensive licensing structure that includes four distinct categories: National Guides, Chauffeur Guides, Area Guides, and Site Guides. This approach ensures guides possess in-depth knowledge of their respective regions' history, culture, and attractions, thereby allowing for a nuanced approach where guides can specialize in different aspects of tourism, ensuring that visitors receive tailored and enriching experiences. Particularly notable is the role of Chauffeur Guides, which integrates transportation services with guiding expertise, offering convenience and comprehensive support throughout the travel experience.

Global practices, on the other hand, often feature centralized or regional licensing systems that emphasize standardized qualifications, delivering high-quality experiences to tourists. While Sri Lanka's TG licensing system excels in recognizing specialized roles like Chauffeur Guides, there are areas for improvement. The findings of this study suggest that Sri Lanka could enhance its system by standardizing training and certification processes across all categories. Currently, the criteria for becoming a TG can vary, leading to inconsistencies in skill levels and service quality among guides. Moreover, professional development and continuing education opportunities could be expanded to keep guides abreast of emerging tourism trends and visitor expectations. The documents also highlight the importance of developing specialized tourism segments within the TG profession to effectively cater to specific tourist interests. For example, eco-tourism, adventure tourism, and cultural tourism are burgeoning sectors where specialized training and certification can enhance guide expertise and visitor satisfaction. By fostering these specialized skills, Sri Lanka can better compete in the global tourism market and attract niche segments of travellers seeking unique and authentic experiences.

Sri Lanka's innovative TG licensing system not only underscores its commitment to delivering personalized and enriched tourism experiences but also reflects a forward-thinking approach in catering to the evolving needs of global travellers. By recognizing and formalizing roles like Chauffeur Guides, Sri Lanka not only enhances the professionalism and quality of its tourism services but also sets a benchmark for other destinations to consider in diversifying and optimizing visitor experiences through tailored guiding roles. However, the system would benefit from further efforts to standardize training, certification, and professional development opportunities across all TG categories to ensure consistency and quality. As the tourism industry continues to evolve, Sri Lanka's adaptive and specialized licensing framework serves as a model for integrating cultural heritage with efficient and informative tourism services, ensuring memorable experiences for all visitors while paving the way for continuous improvement in tourism professionalism and service quality.

Does the Implementation of Tourism Licensing Mechanisms Directly Affect the Economic Contribution of Tourism to a Country's GDP?

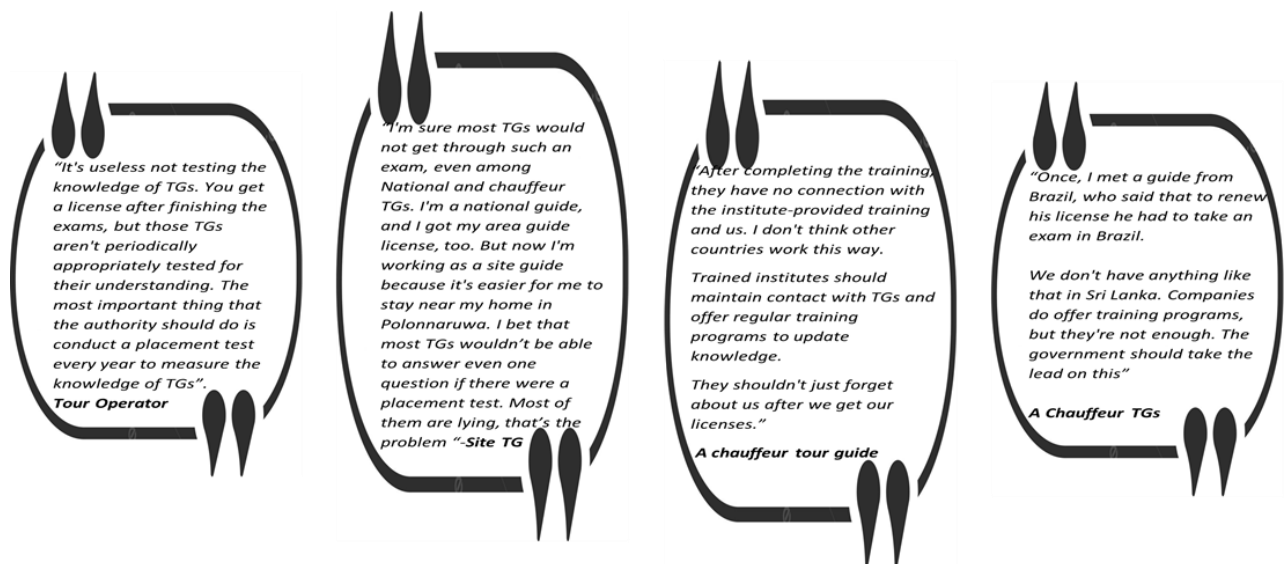
Tourism licensing mechanisms are designed to standardize the quality and professionalism of tourism services, ensuring that TGs and operators meet certain standards. This regulation can lead to an enhanced visitor experience, potentially increasing tourist satisfaction, repeat visits, and positive reviews. In countries with stringent licensing requirements, such as Italy and Greece, there is a notable contribution of tourism to GDP (5.7% and 6.0% respectively). These countries benefit from a regulated tourism industry that maintains high standards and attracts international tourists.

Conversely, in countries without a national licensing mechanism, the impact on GDP varies. For example, Australia and Canada, which lack a national licensing system, have lower tourism contributions to GDP (1.97% and 1.0% respectively). However, the absence of a national system does not necessarily preclude a significant tourism sector, as seen in Germany and the United States, where local or regional regulations can still maintain high standards.

The implementation of tourism licensing mechanisms does have a positive effect on a country's economy by potentially increasing the tourism sector's contribution to GDP. Countries with well-regulated tourism industries tend to see higher economic benefits from tourism. Therefore, while not the sole factor, robust tourism licensing mechanisms play a crucial role in enhancing the economic impact of tourism (refer to Table 10 in the annexure).

Lack of CPD

Continuous improvements in the TG profession are vital to sustaining the demand and staying up to date with the new trends in the market. This is also identified as the best mechanism to be integrated with the license renewal and career enhancement processes. Considering the significance of the industry and the TG to the industry, having Continuous professional development, CPD is a critical step that should be taken by the higher authority of the industry. This would solve many of the challenges faced by TG, such as issues faced at the license renewal, recognition of the profession, career progression and performance, and ability to manage the threat from foreign TGs, and reduce the vulnerability of the TG profession.



Therefore, CPD is one of the best suggestions and initiatives the industry should consider investing in. The quotes below are from value chain actors regarding the need for CPD for TGs.

Chapter Summary 6 : Motivations and challenges of Tour Guiding in Sri Lanka

Many motivations and countless challenges will shape the TG profession's prosperity in Sri Lanka. The support of all value chain actors and authorities is critical to mitigate identified challenges and leverage skills to ensure TG becomes a sought-after profession for youths in the country. The independence attached to the TG job has been a significant expectation of people who have joined TGs. However, once they have grown in the job, financial benefits become the primary reason they continue working as a TG, irrespective of their many challenges. Some of the key challenges identified in this study are the threat of foreigners bringing their guides/interpreters, competition from unlicensed guides, seasonal impact on the job due to the non-permanent nature, lack of communication from the relevant authority, lack of support and coordination from the appropriate authority, limited facilities and accommodation, digital Trends, recognition issue of TG, hardships in licensing & license renewal process, and lack of Continuous professional development of TGs. One of the critical challenges that should be solved is the establishment of professional development, which is expected to solve many other challenges. Building strong communication channels and coordination between authorities and TGs has been identified as another critical change to ensure that TGs' maximum potential is harvested to provide the best service to tourists.

4.4. The Estimated Future Need for Tour Guides in Sri Lanka & Future Trends

The Share of Tourists Who Use Tour Guide Services.

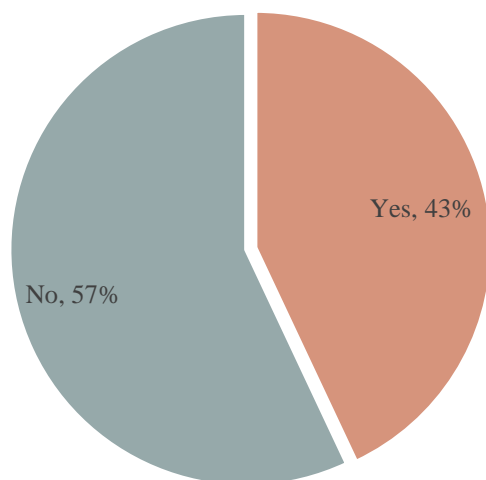
The analysis of the future need for TGs in Sri Lanka begins with understanding the current trends in tourists' usage of TG services. Post-COVID, Sri Lanka has seen substantial growth in its tourism industry, attracting diverse international tourists. According to this survey involving 302

tourists, 43 percent reported using TG services during their visit to Sri Lanka (refer to [Figure 50](#)). This figure is an increase from a 2018 study by the SLTDA, which indicated that 37 percent of tourists used TG services (refer to [Figure 51](#)). Although these studies are not directly comparable, the trend suggests a growing demand for TG services. However, digital trends that may affect the reliance on TGs among specific tourist segments could influence the future TG service usage among tourists.

Figure 50: Usage of TG service by tourists

Question: Have you engaged the services of a TG during your visit?

Survey Sample: 302 Tourists



SOURCE: SLTDA
2018 TG service user percentage

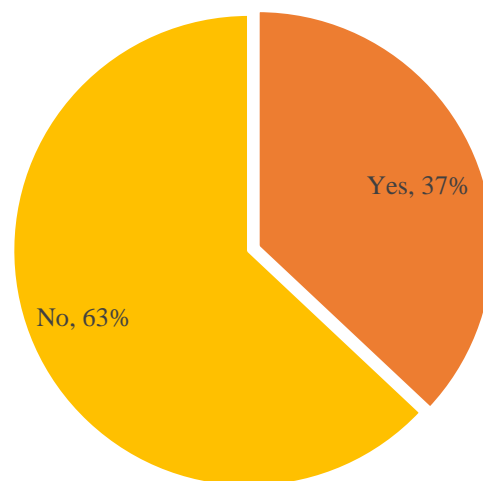


Figure 51: TG service usage in 2018 as per SLTDA

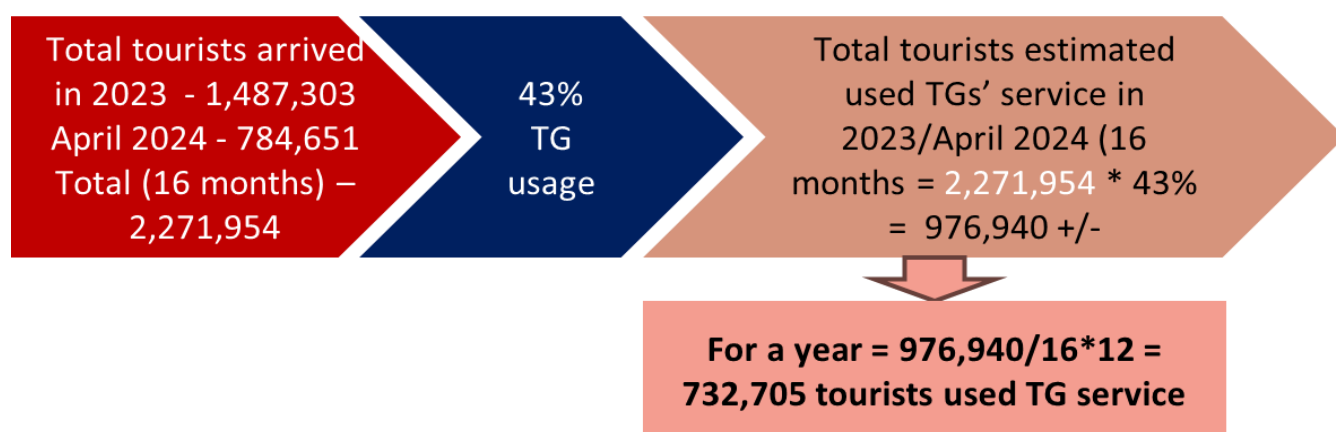
Estimate of Tourist Numbers Using TG Service During 2023 & till April 2024 – Top-Down Approach.

What is the Top-Down Approach? Estimate the number of tourists who use TG by applying the TG user share captured from the study to the total number of tourists who arrived in 2023 and 2024 until April.

*TG Used share * Number of tourists arrived in Sri Lanka between January 2023 to April 2024 period.*

This study showed that 43 percent of the tourists who arrived this year could have used TGs' service. The secondary data showed that 2,271,954 tourists arrived in Sri Lanka from January 2023 to April 2024, a 16-month period. Accordingly, 976,940 tourists can be identified as TG service users during Jan 2023/ April 2024 ($2,271,954 \times 43\%$). Accordingly, it can be estimated that approximately 732,705 +/- used TG service during the last one-year period ($976,940 / 16 \times 12$), which is depicted in Figure 52).

Figure 52: TG estimation per a year



Estimate of Tourist Numbers Using TG Service During 2023 & till April 2024 – Bottom-Up Approach

What is the Bottom-Up Approach? Estimate the number of tourists who use TG from the number of active TGs servicing in Sri Lanka and apply the average number of tourists they service at a time and the number of trips they do in a typical year. In this case, as the study was conducted in April 2024, 16 months, including 12 months in 2023 and four months in 2024, were counted for estimates and then converted to 12-month usage.

The data gathered from this study was used to estimate the types of tourists handled by every kind of TGs, the number of tourists they hold at a time, and how many such trips in a year, as presented in **Error! Reference source not found.**

Further, the assumption made here is that most tourists make their first contact with the NTGs/CTGs/ ULTGs who work under tour operators, and when it comes to the Areas and Sites, the same tourists are served by the Area and Site Guides. Therefore, to eliminate double counting, Area and Site guides are not considered for this calculation.

The estimates captured from both approaches (top-bottom & bottom-up) are expected to validate each other.

Instructions to read the Table 5

- COLUMN A - TABLE NO 05 - The estimated number of National guides (NTG), Chauffeur guides (CTG), and unlicensed guides (ULTG)** - As estimated in Chapter 4.1 above, there are 1892 NTGs, 1552 CTGs, and 1460 ULTGs in the country.
- COLUMN B- The number of active guides under each category** - The study revealed that approximately 50 percent of these registered NTGs must be active, and hence, the final number of NTGs who service the tourists is counted as 946, and it was assumed that 1474 (95%) CTGs and ULTGs are active in their jobs.
- COLUMN C- Number of large groups handled in the last 16 months by one guide average** - Based on the interviews conducted among TGs, it was estimated that one NTG

served approximately 12 large groups during 2023 and the first quarter of 2024. CTG has not handled any large groups as CTGs cannot handle them due to its license restrictions. It was estimated that one ULTG managed 16 large groups during the same period.

4. **COLUMN D- Average number of tourists in a large group** - The average number of tourists in a group has been estimated as 12 based on NTG discussions and 16 as per the discussion with ULTGs.
5. **COLUMN E- Number of families/friends groups handled in the last 16 months by one guide average** - The average number of family/friend groups handled by NTG, CTG, and ULTG, as identified in the study, is 15,10,12, respectively.
6. **COLUMN F- The average number of tourists in a family/friend group** - The average number of family/friend groups handled by each NTG, CTG, and ULTG has been estimated as five tourists in a group.
7. **COLUMN G- Number of couples handled in the last 16 months by one guide average** - The number of couples handled by NTG, CTG, and ULTG was estimated as 7,15,25 in order.
8. **COLUMN H- The average number of tourists in a couple, which is two.**
9. **COLUMN I- Number of Solos handled in the last 16 months by one guide average** - The number of solo tourists handled by NTG, CTG, and ULTG was estimated as 2,6,5 in order.
10. **COLUMN J- The average number of tourists in a solo, which is one.**
11. **COLUMN K** - Final calculation of the total number of tourist services by each type of TG in the last 16 months.

Accordingly, for the 16 months ending April 2024, it was estimated that 256,366 tourists had been serviced by 946 NTGs, 1474 CTGs had serviced 126,798 tourists, and 518,300 tourists had been serviced by ULTGs. Therefore, 901,464 tourists comprise the estimated number of people who used the TG service in Sri Lanka between 2023 and April 2024. Converting this to 12 months, a total of 676,098 tourists services by 3,880 TGs.

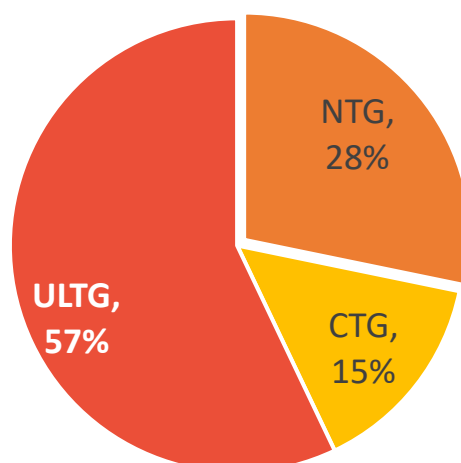
The estimated number of tourists who used TG service for a year based on the Top-down approach is 732,705, and when calculating the same using the bottom-up approach, it is 676,098.

Between the two estimates, there is a 7 percent variation, which is acceptable to conclude that approximately 700,000 tourists used TG service during the last year. If 676,098 tourists used TG services, the share by type of TG can be presented as 28 percent of the tourists are services by NTGs, 15 percent is handled by CTG, and most of the tourists, like 57 percent, are handled by ULTGs in the country (refer. Figure 53).

Table 5: Estimation of number of tourists use TG service in 2023 - April 2024

Type of Guides	Estimated TGs	Active TGs	LARGE TOURIST GROUPS		SMALL GROUPS						TOTAL / 16 months
			Number of large groups handled in the last 16 months by one guide average	Average number of tourists in a large group	Number of families/friends groups handled in the last 16 months by one guide average	Average number of tourists in a family/friends group	Number of couples handled in the last 16 months by one guide average	Average number of tourists in a couple	Number of Solos handled in the last 16 months by one guide average	Average number of tourists in a solo	Total Tourist serviced in 2023/2024 (16 months) (b*c*d)+(b*e*f)+(b*g*h)+(b*i*j)
	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)
NTG	1892	50% 946	12	12	15	5	7	2	2	1	256,366
CTG	1552	95% 1474	0	0	10	5	15	2	6	1	126,798
ULT G*	1460	100% 1460	16	15	12	5	25	2	5	1	518,300
Total Tourists handled 2023-YTD 2024 (16 months)											901,464
Total Tourists handled in a year (12 months)											(901,464/16)*12
											676,098

Figure 53: Tourist usage share of NTGs, CTGs, and ULTGs



Estimate of Tourist: TG ratio Based on the Estimates Done Based on the Bottom-Up Approach

From here onwards, the estimates arrived at the bottom-up approach will be considered for the rest of the forecast.

Table 6 below displays the estimated ratio of tourists per TG per month for each TG category. Accordingly, NTG services approximately 16.9 tourists in a month, a CTG services 5.4 tourists in a month, and a ULTG services 22.2 tourists in a month. Across all types of TGs, the 14.3 tourists per TG ratio can be estimated for a month.

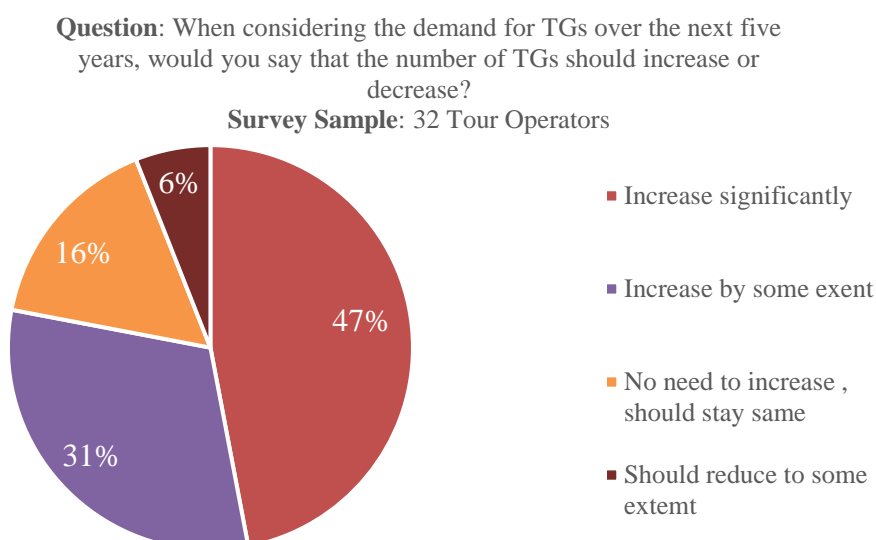
Table 6: Estimation of number of tourists: TG ratio per month

Type of Guides	Estimated	Active	TOTAL / 16 months	TOTAL / 12 months	Ratio Calculation	Ratio Tourist per Guide per month
			Total Tourist serviced in 2023 /2024			
	(a)	(b)				
NTG	1892	50% 946	256,366	192,274	192,274.5/ 946	16.9
CTG	1552	95% 1474	126,798	95,099	95,099 / 1474	5.4
ULTG	1460	100% 1460	518,300	388,725	388,725 / 1460	22.2
Total			901,464	676,098		14.3

Consideration when Estimating TGs for Future

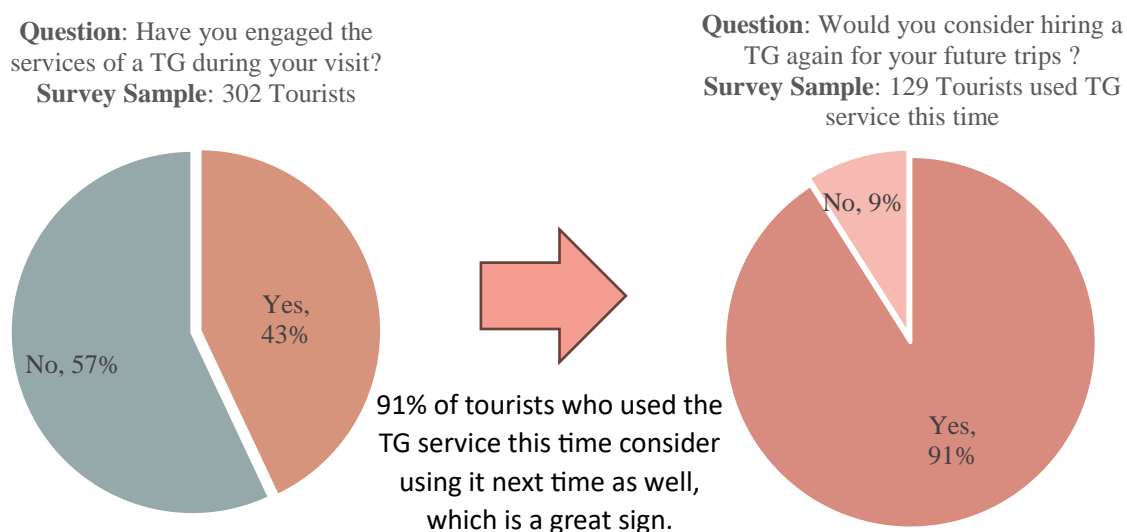
When investigating the country's future requirement for TGs, many experts and other value chain actors could not gauge a quantity as many factors are involved in changing the requirement, especially the unpredictable nature of the tourism industry and global economic conditions. However, as presented in the below figure, most tour operators (78%) believe that the current pool of trained TGs must be increased to meet the country's tourist demand.

Figure 54: TGs demand for the next five years (Tour operator's view)



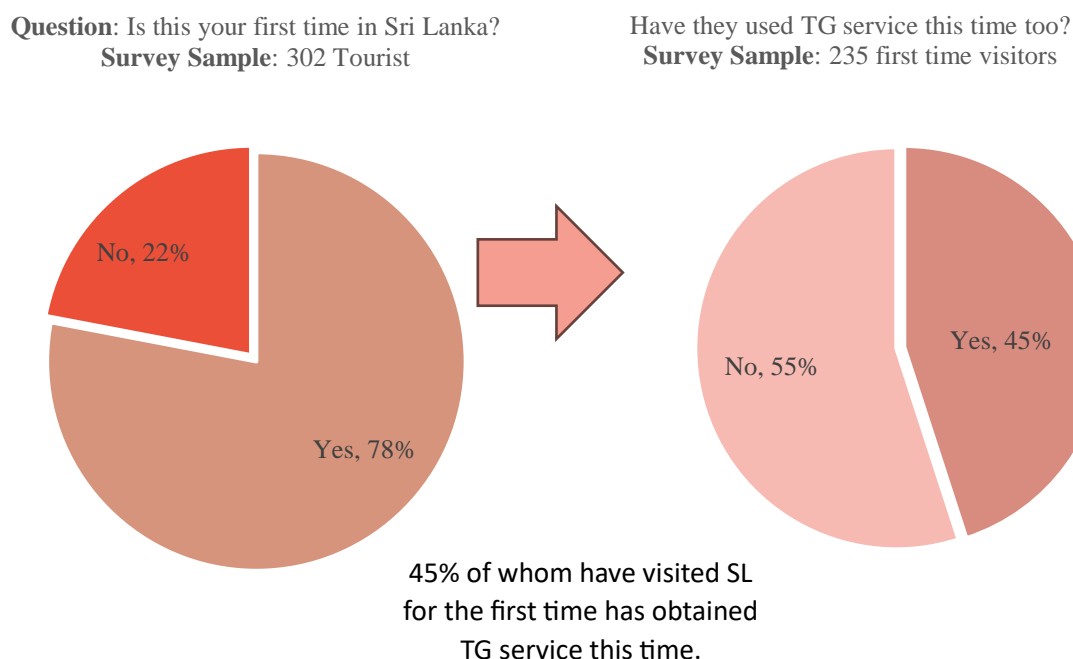
Forty-three percent used TG service this time. When asked whether they will use TG service next time, 91 percent plan to. That means 9 percent will not use TG service next time, which means the TG service usage share will drop to a maximum of 40 percent (refer to).

Figure 55: Future TG service usage share - estimate



The study data noted that 78 percent of the tourists surveyed were first-time visitors to Sri Lanka, and 45 percent had used the TG service (refer to Figure 56).

Figure 56: Tourists' usage of TGs



Among the tourists who have used TG services in Sri Lanka, 64 percent have used TG services in other countries. That means out of 43 percent who used TG service in Sri Lanka, 64 percent have used TG service in other countries and are considered the most loyal or frequent TG service users when traveling. That means 27 percent (64% of 43%) could be the lowest TG user share we expect, assuming that this segment of 27 percent of tourists most likely would need TG when traveling.

However, to calculate the required quantity of TGs for future demand, as discussed above 40 percent TG user share will be taken as the maximum TG service usage, although the lowest possible that it can go down to 27 percent.

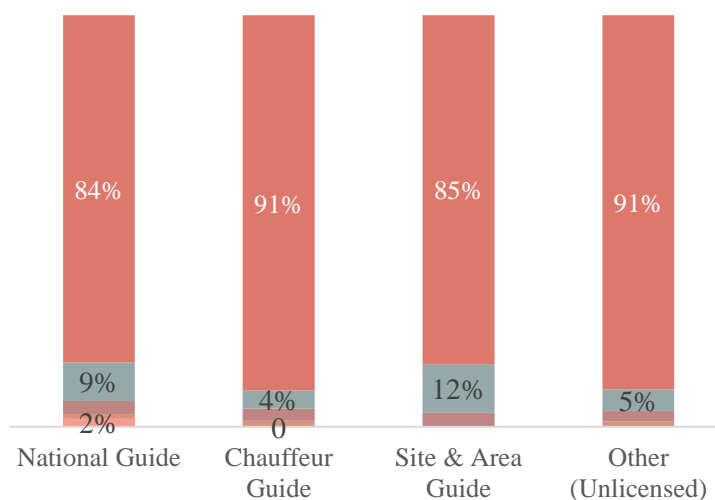
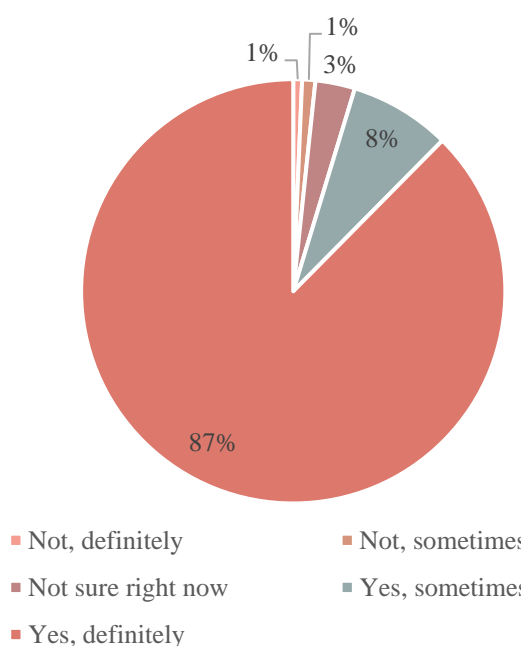
Estimate of TG Turnover in the Future.

This study learned that a smaller segment of TGs does not plan to continue in the TG job due to migration and other plans. Around 88 percent of TGs mentioned that they will continue working as TGs in the country; only 12 percent have shaky thoughts on that. The pattern of future turnover is common across all types of TGs, as displayed in the charts below (refer to Figure 57).

Figure 57: TGs' plans to continue in the job

Question: Are you planning to continue in TG?

Survey Sample: 300 TGs

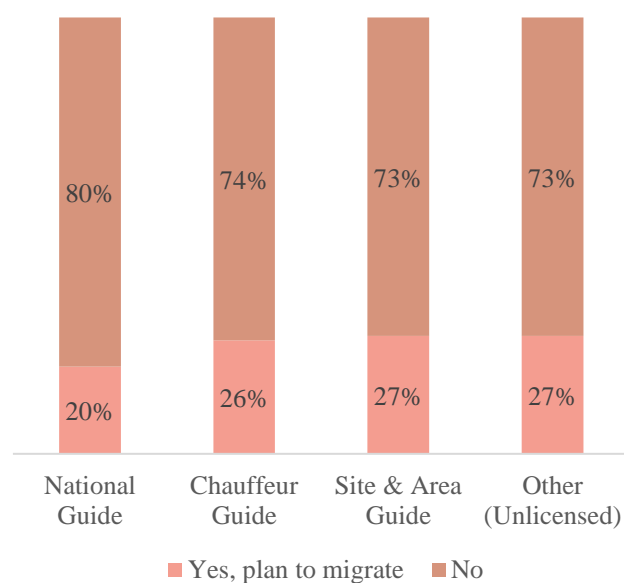
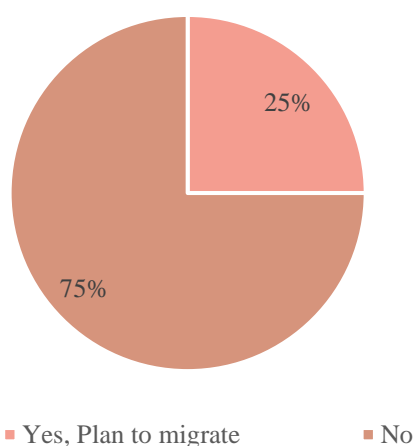


Further, 25 percent of the TGs stated they plan to migrate for many reasons. One of the biggest reasons for that is the country's current economic downturn. Therefore, this rate of drop in TG count has been applied when calculating the future additional requirement of TGs to the country to service the tourists who are going to come in 2030 (refer to Figure 58).

Figure 58: TGs' plans to migrate in the future

Question: Are you planning to migrate?

Survey Sample: 300 TGs



After adjusting possible turnover at each TG type level, the total of active 5,323 TGs would be reduced to 3967 TGs, which includes 757 NTGs, 1091 CTGs, 1066 ULTGs, and 1053 Area and Site guides. That means 1356 TGs are estimated as the pool of TG who would leave the job, and hence, only 3967 TGs would be available to service tourists in the future if new TGs were not recruited or trained, as discussed in the table below (refer to [Table 7](#)). That means 2914 TGs with NTGs, CTGs, and ULTG are there to directly service tourists in the future, and Site and Area guides are considered the team who service the same tourists mainly. Therefore, this study would estimate the required NTGs and CTGs calibre skills only.

Table 7: TG Population After Possible Turnover

Type of Guides	Estimated	Active	Turnover %	Future Active Pool Size
NTG	1892	50% 946	20%	757
CTG	1552	95% 1474	26%	1091
ULTG	1460	100% 1460	27%	1066
Site & Areas TGs	1443	1443	27%	1053
Total				3967

} **2914**

Estimate of TG for the Year 2030.

According to the Ministry of Tourism's estimated plans, the tourist population is expected to reach 4,000,000 by 2030. This is a substantial increase from the current tourist inflow to the country. This projection underscores the necessity for strategic planning in the tourism sector to accommodate the growing number of visitors and ensure that the quality of tour services remains high.

As estimated above, if 40 percent of these tourists use TG service, 1.6 million tourists need TG service. It was also estimated that the ratio of tourists per TG per month is 16.9, 5.4, and 22.2, respectively, for NTGs, CTGs, and ULTGs. Applying these ratios, it can be estimated that 9,336 TGs are required at NTG and CTG levels to service the future demand for TG (refer to [Figure 59](#)).

Note: How did 9,336 arrive?

(NTGs for a month = $37,333/16.9 = 2209$) + (CTGs for a month = $20,000/5.4 = 3704$) + (ULTGs for a month = $76,000/22.2 = 3423$) → $2209+3704+3423 = 9336$

After turnover, there are 757 active NTGs, 1,091 CTGs, and 1,066 ULTGs currently. That means if all ULTGs make licensed TG, there is a total of 2914 TG already in the market.

Therefore, the new requirement is 6,422 NTG and CTG to service the 1.6 million tourists in 2030, as presented in the below *Figure 59*. Approximately 3,809 NTGs and 2,613 CTGs need to be trained to fill the skills gap required for 2030.

Note: How did the NTG requirement of 3809 arrive?

$(\text{NTGs for a month} = 2209) + (\text{ULTGs for a month} = 3423) = 5632 - ((\text{Current NTGs pool} = 757) + (\text{current ULTGs pool can be absorbed} = 1066)) = 3809$ NTG caliber is needed to meet the need in 2030.

Note: How did the CTG requirement of 2613 arrive?

$(\text{CTGs for a month} = 3704) - (\text{current CTGs pool} = 1091) = 2613$ CTG caliber is needed to meet the need in 2030.

Figure 59: Future NTG and CTG new requirement

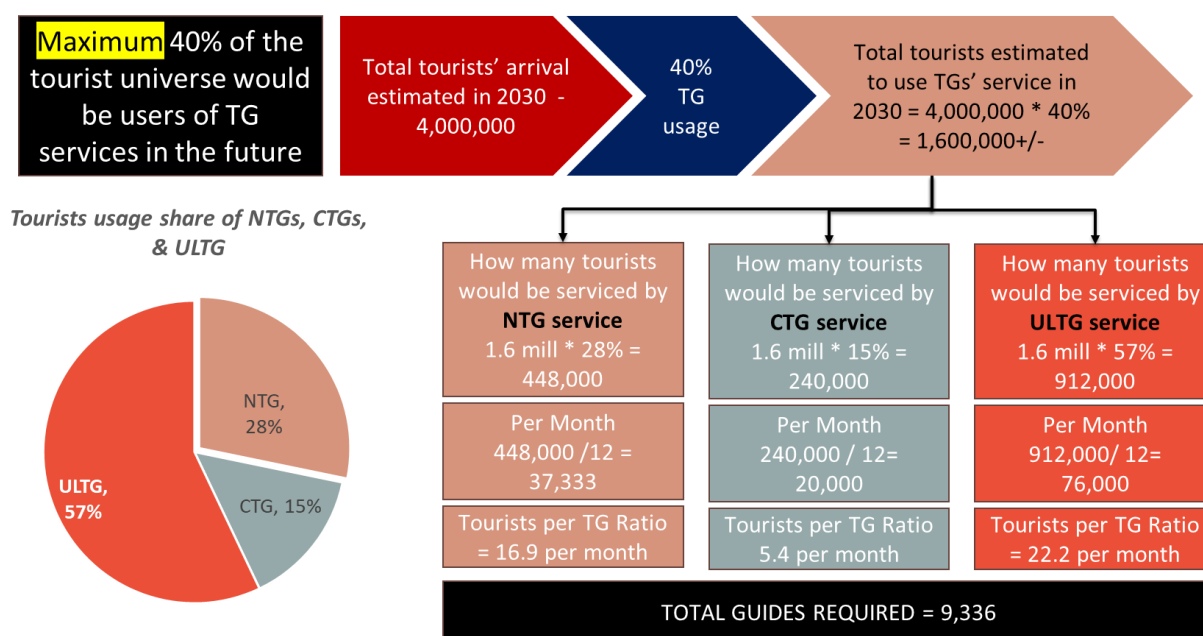
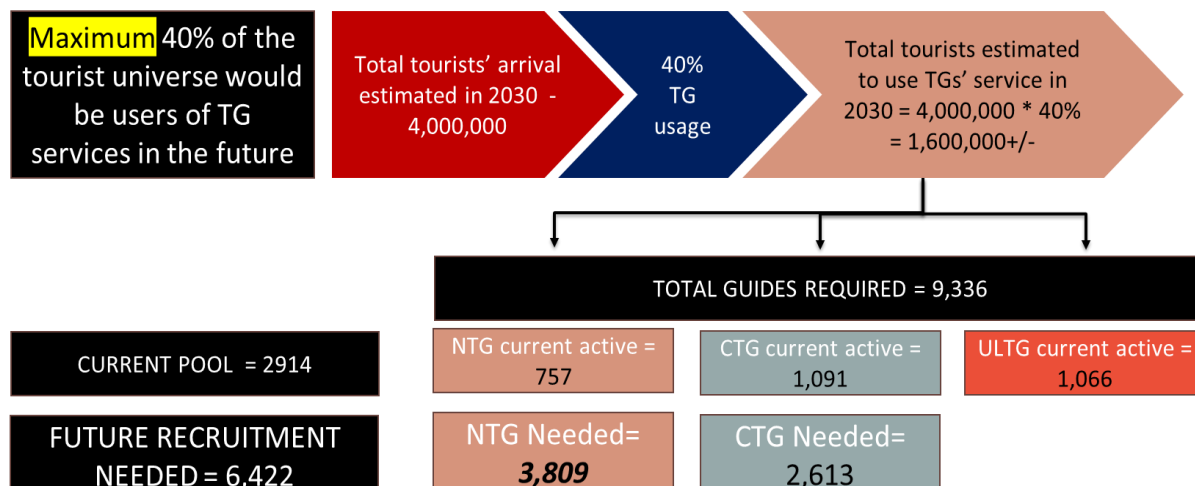


Figure 60: Future Requirement for TGs - Maximum



Chapter Summary 7 : Estimated Future Need for TGs and Future Trends

This chapter explores the current and projected future need for TGs in Sri Lanka, focusing on trends and estimates derived from both top-down and bottom-up approaches. Current data indicates a rising trend in TG usage among tourists, with approximately 43 percent utilizing TG services as of the latest surveys. This growth underscores the increasing demand for TGs in tandem with Sri Lanka's expanding tourism sector post-COVID-19. The top-down approach estimates that around 732,705 tourists utilized TG services in the past year, while the bottom-up approach calculates a slightly lower figure of 676,098 tourists serviced by TGs. Both methods converge to suggest a robust demand for TGs, with a notable reliance on unlicensed TGs, who handle a significant majority of tourist interactions.

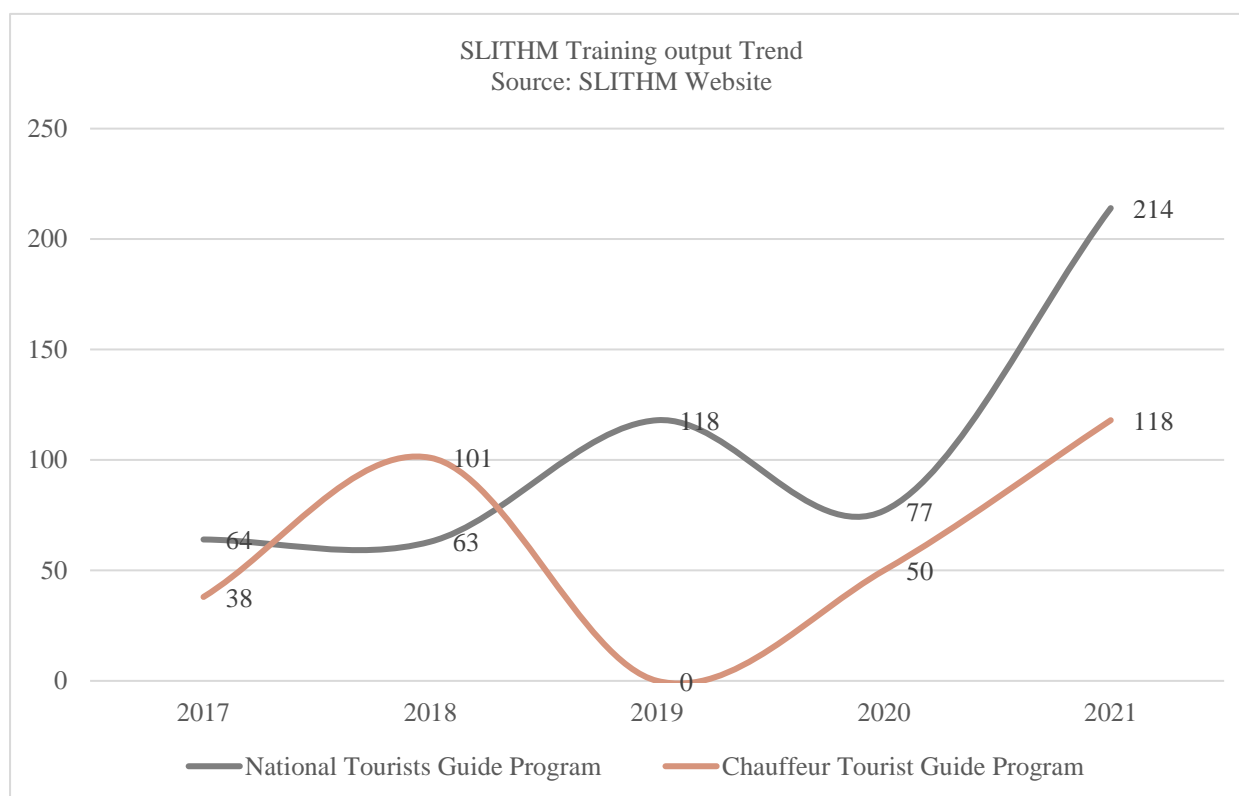
Looking forward to 2030, projections indicate a substantial increase in tourist arrivals to 4 million, necessitating careful planning to meet future TG requirements. Despite anticipated turnover among current TGs, efforts to retain and train new guides are crucial. A comprehensive analysis suggests a need for approximately 6,422 trained NTGs and CTGs to adequately serve the anticipated tourist influx, emphasizing the importance of strategic workforce development in the tourism sector. In conclusion, while challenges such as economic fluctuations and turnover rates among TGs exist, proactive measures to expand and upskill the TG workforce are essential to sustainably meet the future needs of Sri Lanka's tourism industry.

4.5. Current Supply of Tour Guides and Skill Gap

According to SLITHM's published data shown in the figure below(refer.), the candidates who have completed the National TG and Chauffeur TG programs since 2017 are presented. The data shows that the number of training programs completed lacks consistent growth. For example, 38 registered in 2017, increased to 101 in 2018, dropping to zero in 2019. However, it has risen again to 50 and 118 in 2020 and 2021 respectively irrespective of Covid restrictions.

Nonetheless, a completely different trend can be seen in the number of people who registered for the National TG training, which has maintained a consistent trend from 2017 onwards, with a slight drop in 2020. As per the expert views, the training conducted in 2020, and 2021 had been mostly online due to Covid lock down, and hence the outcome expected was not fully achieved as the training were limited to class room sessions.

Figure 61: SLITHM Training data



Note: the supply-side data was published from 2017 - 2021 only.

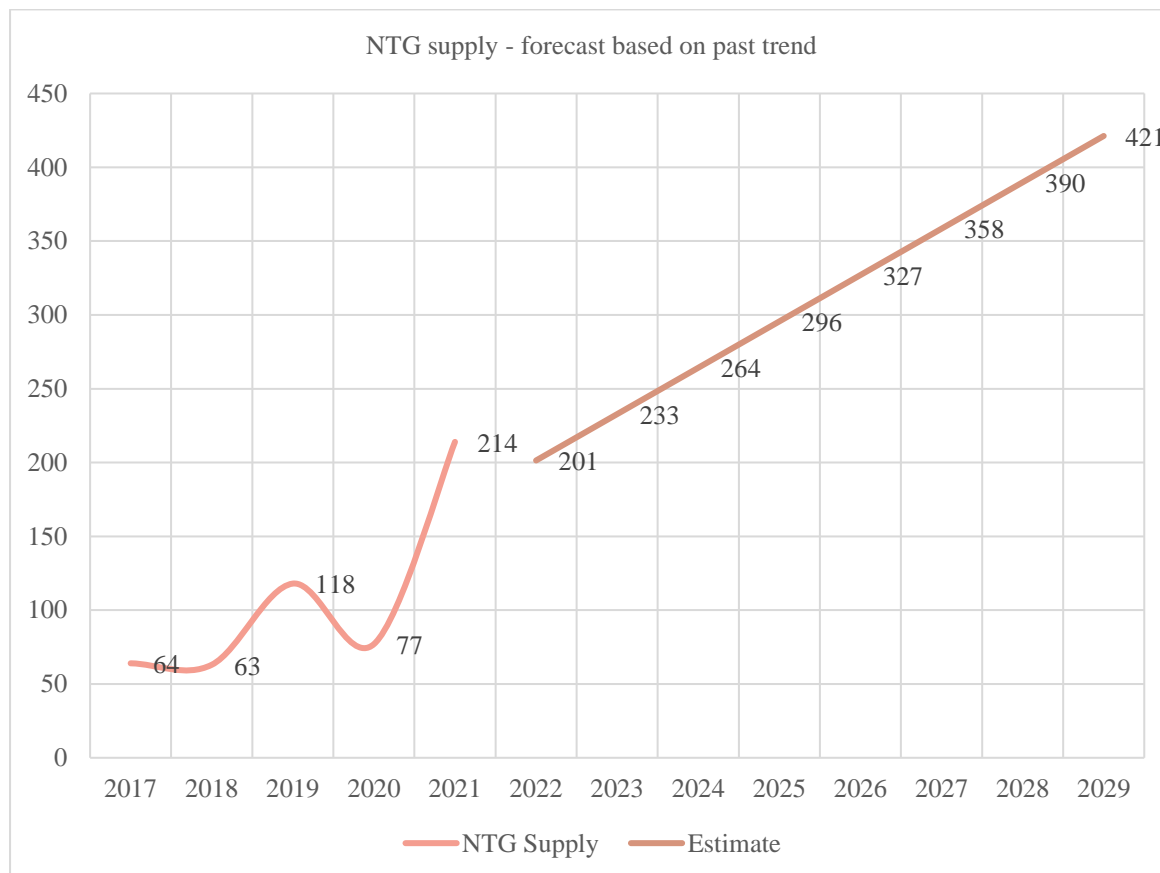
Based on SLITHM's past trend of training National TGs presented in the above figure, it is forecasted that 2490 National TGs will be produced by 2029 with the existing resources (refer. [Figure 62](#)). This is 65 percent of the requirement of the National TGs for 2030, which is 3809 (refer to

[Figure 60](#))

$(2490/3809 \times 100 = 65\%)$.

Therefore, it is important to relook at the resources that can be increased at SLITHM and other associations involved in the skill supply of National TGs to increase the annual supply trend to meet the total requirement of National TGs for 2030. At least 953 National TGs ($3809/4$ years) should be trained and released annually from 2025 to 2029 to create the additional required pool to service 1.6 million tourists in 2030.

Figure 62: NTG supply forecast based on past data

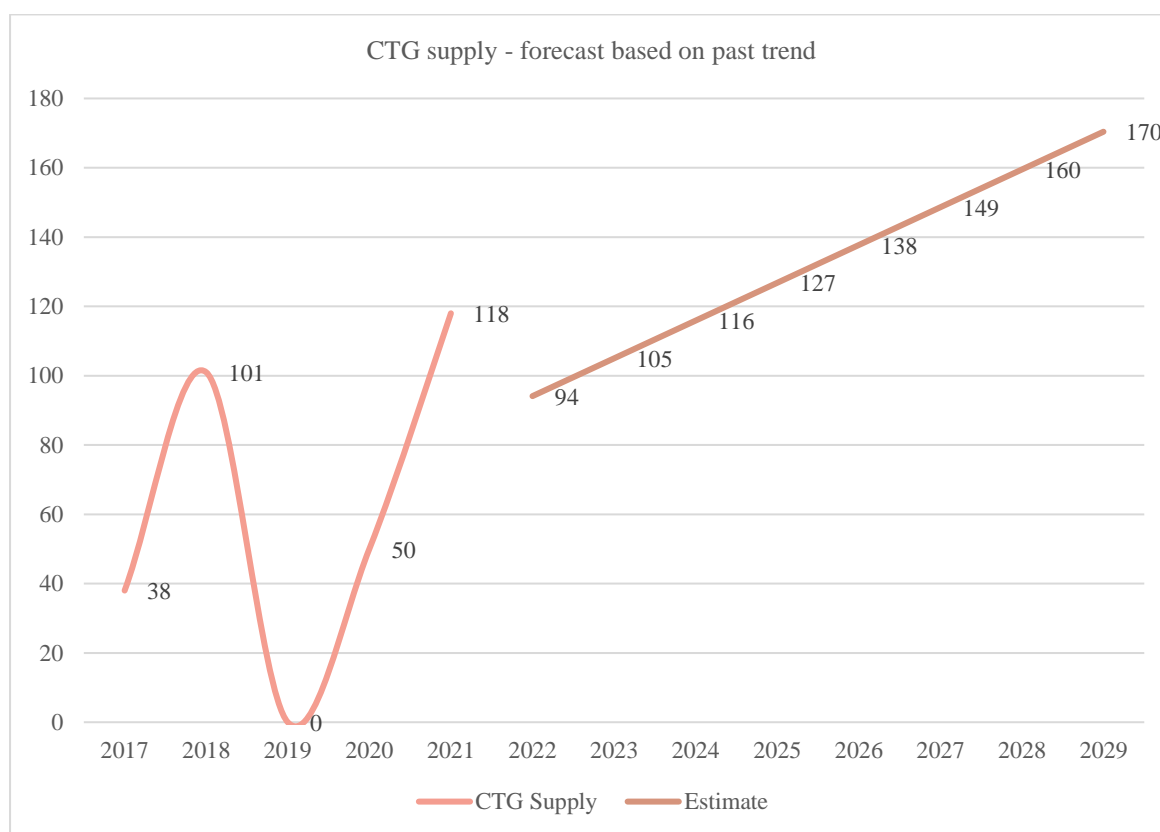


Based on SLITHM's past trend of training Chauffeur TGs presented in the above figure, it is forecasted that 1059 Chauffeur TGs will be produced by 2029 with the existing resources (refer. Figure 63). This is 41 percent of the requirement of the National TGs for 2030, which is 3809 (refer.

Figure 60)

$(1058/2556 \times 100 = 41\%)$.

Therefore, it is important to relook at the resources that can be increased at SLITHM and other associations involved in the skill supply of Chauffeur TGs to increase the annual supply trend to meet the total requirement of Chauffeur TGs for 2030. At least 653 National TGs (2556/4 years) should be trained and released annually from 2025 to 2029 to create the additional required pool to service 1.6 million tourists in 2030.

Figure 63: CTG supply forecast based on past data

Chapter Summary 8 : TG Skill Gap

This chapter examines the crucial role of training institutions like SLITHM in preparing future TGs, explicitly focusing on the forecasted supply of National and Chauffeur TGs leading up to 2030. According to SLITHM's training data, 214 National TGs and 118 Chauffeur TGs were trained in 2021, providing a baseline for future projections. Looking ahead, SLITHM forecasts that by 2029, it will produce approximately 2,490 National TGs, fulfilling 65 percent of the additional requirement projected for 2030, which stands at 3,809 National TGs. Similarly, the forecast for Chauffeur TGs anticipates training 1,058 by 2029, meeting 41 percent of the 2,556 Chauffeur TGs needed by 2030. This analysis underscores the need to enhance training resources at SLITHM and other relevant institutions to bridge the gap between current and future TG demands. To adequately meet future requirements, the chapter recommends an annual training output of 953 National TGs and 653 Chauffeur TGs from 2025 to 2029. This strategic approach aims to ensure a sufficient pool of skilled guides to accommodate the anticipated 1.6 million tourists in Sri Lanka by 2030 who need to use the TG service. By scaling up training initiatives, stakeholders can proactively address workforce shortages and sustain the quality of tourist services amidst growing tourism inflows. In conclusion, while SLITHM's current training efforts provide a foundation, increasing the annual outputs of National and Chauffeur TGs is imperative. This proactive approach will support the tourism industry's expansion, foster economic opportunities, and uphold Sri Lanka's reputation as a premier tourist destination.

4.6. International Guidelines Vs Sri Lanka Training Curriculum

WFTGA Guidelines for Tour Guides

According to our observation, international guidelines for TGs are limited, but the WFTGA (*World Federation of Tourist Guide Association*) provides a Code of Guiding Practices for TGs (<https://wftga.org/about>). The identified categories of these practices are professionalism and morality, truthfulness, fair trade, environmental and ethical responsibilities, marketing, and promotion (refer. *Table 8*).

Table 8: International Guidelines for TG Standards

Code of Guiding Practices for Tour Guides as per WFTGA	Researcher's identification of the areas of practices
<i>To provide a professional service to visitors, professional in care and commitment, and professional in providing an objective understanding of the place visited, free from prejudice or propaganda.</i>	PROFESSIONALISM & MORALITY
<i>To ensure that, as far as possible, what is presented as fact is true and that a clear distinction is made between this truth and stories, legends, traditions, or opinions.</i>	TRUTHFULNESS
<i>To act fairly and reasonably in all dealings with all those who engage the services of guides and colleagues working in all aspects of tourism.</i>	FAIRTRADE
<i>To protect the reputation of tourism in our country by making every endeavor to ensure that guided groups treat with respect the environment, wildlife, sights, and monuments, as well as local customs and sensitivities</i>	ENVIRONMENTAL AND ETHICAL RESPONSIBILITIES
<i>As representatives of the host country welcome visitors and act in such a way as to bring credit to the country visited and promote it as a tourist destination</i>	MARKETING & PROMOTION

Focusing on global TG standards is crucial when considering the Sri Lankan TG curriculum. In this regard, the WFTGA TG guidelines are essential for evaluating and comparing the local curriculum. The WFTGA TG guidelines cover the areas presented in the table below (refer. *Table 9*), and it is vital to note that most of these areas are also covered in the Sri Lanka TG curriculum. For example, stage 3 of the Sri Lanka TG curriculum comprehensively covers practical guiding skills, as in the WFTGA TG guidelines. Applied Knowledge/Sensitization Skills are covered at stages 1 and 2 of the Sri Lanka TG curricula. While the TG curricular content is consistent with the content used globally and published by WFTGA, vital areas listed below must be added to the Sri Lanka TG curriculum.

- Sensitivity to host communities' cultures, customs, and traditions.
- Marketing and promotion strategies
- Financial literacy (budgeting, pricing)
- Fostering community development (supporting local businesses)

These training needs are further discussed in the Training chapter (refer.

4.7. Training Needs for the Tour Guides to Prepare **for Future**)

WFTGA TG Guidelines and Compare with Sri Lanka Curricula

Table 9: WFTGA TG Guidelines compared with Sri Lanka TGs Curricula

Areas	Description	Example Skills	Which Stage of the SL curriculum covered these areas
Practical Guiding Skills	This category focuses on the hands-on skills needed to be an effective TG.	* Scenario training (handling emergencies, lost tourists) * Tour preparation (logistics, itinerary management) * Terminology (historical sites, flora & fauna)	Stage 3
Applied Knowledge/ Sensitization Skills	This category emphasizes cultural sensitivity and philosophical aspects of tour guiding.	* Sensitivity to host communities (customs, traditions) * Societal background understanding (history, social issues) * Building a guiding philosophy (ethics, environmental responsibility)	Stages 1 & 2
Interpersonal and Behavioral Skills	This category focuses on communication and interaction with tourists.	* Group management (engagement, conflict resolution) * Individual interaction (catering to diverse needs) * Cross-cultural communication (understanding cultural differences)	Stages 1 & 2
Business Management Skills	This category equips guides with a business perspective to succeed in the industry.	* Marketing and promotion strategies * Financial literacy (budgeting, pricing) * Fostering community development (supporting local businesses)	

Areas	Description	Example Skills	Which Stage of the SL curriculum covered these areas
Knowledge of Tourism Products	This category ensures guides can effectively communicate information about tours and experiences.	* In-depth knowledge of tourist attractions and activities * Ability to explain historical significance and cultural context * Educational delivery skills (storytelling, clear communication)	Stages 1,2,3
Tourism Context	This category keeps guides informed about the evolving tourism industry and its ecosystem.	* Awareness of current tourism trends * Understanding the tourism supply chain (roles of different stakeholders) * Adapting to changes in the industry (e.g., sustainability practices)	Stage 3

Instructions to read the table: This table above outlines the TG training guidelines emphasized by the WFTGA (Column 1,2,3).

The Grey highlighted areas are lacking in the Sri Lanka TG curriculum.

Sri Lanka TG Curricular can be found in the annexure section.

Chapter Summary 9 : International training guidelines and overall comparison with Sri Lanka TG curricular

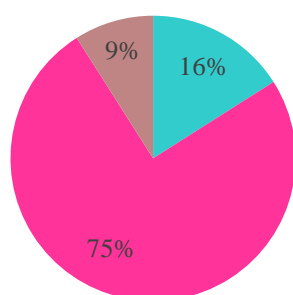
This chapter delves into the international standards of the World Federation of Tourist Guide Associations (WFTGA) and their comparison with the current Sri Lankan Tourist Guide curriculum. The WFTGA's guidelines, encompassing professionalism, truthfulness, fair trade, environmental and ethical responsibilities, and marketing promotion, serve as a benchmark for evaluating local training programs. While Sri Lanka's TG curriculum aligns well with several WFTGA guidelines, notable gaps are identified, particularly in sensitivity to host communities, marketing and promotion strategies, financial literacy, and fostering community development. The comparison between the WFTGA published curriculum and the Sri Lanka TG curriculum revealed that practical guiding skills, applied knowledge and sensitization skills, interpersonal and behavioural skills, business management skills, knowledge of tourism products, and tourism context are comprehensively covered across various stages of the Sri Lankan TG curriculum. However, sensitivity to host communities' cultures, customs, and traditions, detailed marketing and promotion strategies, financial literacy, including budgeting and pricing, and initiatives supporting local community development are areas where the Sri Lankan curriculum currently lacks specific emphasis. The chapter below 4.7 discusses the training needs for the TGs to prepare for the future. Further discussed, new skills should be enhanced in TG to face future trends irresistibly.

4.7. Training Needs for the Tour Guides to Prepare for Future

Apart from the critical areas we identified above to be added to the Sri Lanka TG curriculum, this chapter aims to identify the current status of training in Sri Lanka and any further improvements. According to the survey data collected from tour operators, it is quite clear that most of the tour operators receive trainings for their TG teams through SLITHM (Presented in the Figure 64, Figure 65).

Figure 64: Tour Operators' source of training for their TGs

Question: How do the TGs in your organization receive their training ?
Survey Sample: 32 Tour Operators

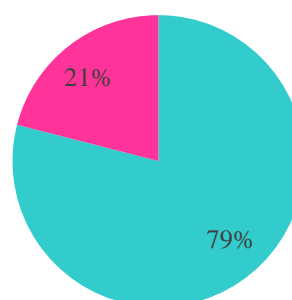


■ Internal training within the organization -

■ Externally (Ask -Which external institutions or training organizations do your tour guides receive training from?

■ Both

Question: External parties who conducts trainings for TGs?
Survey Sample: 32 Tour Operators



■ SLITHM

■ Other Institutes

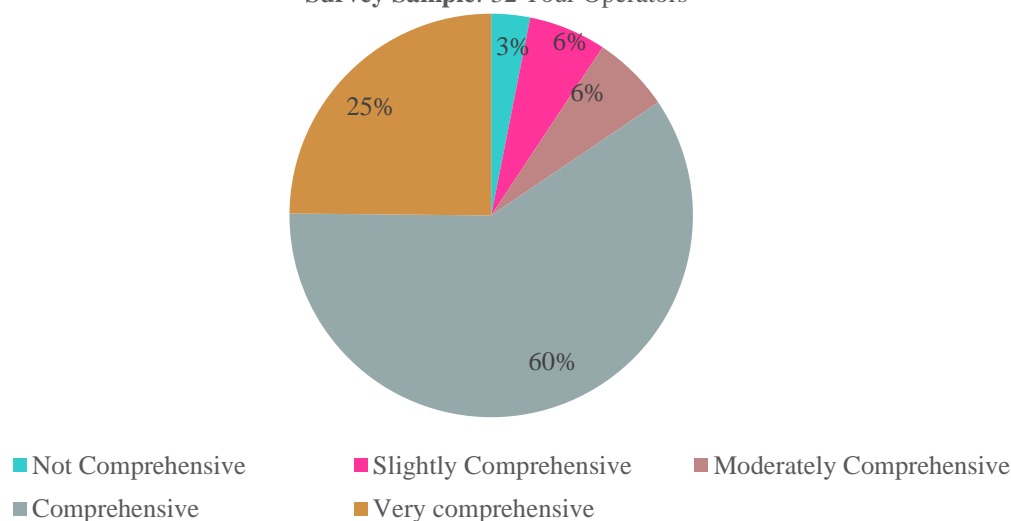
Figure 65: Methods of training TGs by tour operators

Accordingly, 1/4 of tour operators are overwhelmed by the comprehension of the training provided for TGs in the country. Another 59 percent accept that the training courses are comprehensive. Similarly, as presented below, 19 percent of the Tour Operators believe that the training offered for TGs is excellent quality, and 34 percent mentioned that this training maintains good quality.

Figure 66: Tour Operators' perception on comprehension of current training program

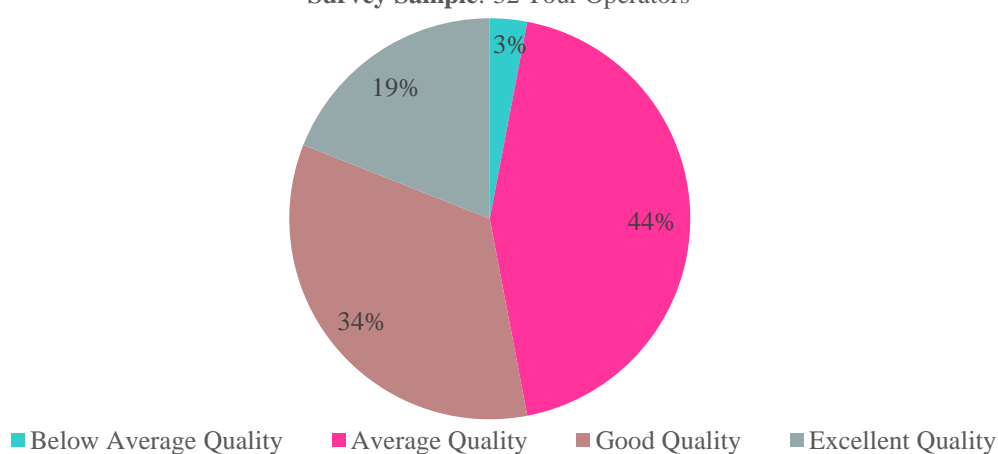
Question: In general, how do you evaluate the comprehensiveness of the current training programs for TGs in Sri Lanka?

Survey Sample: 32 Tour Operators

*Figure 67: Tour Operators' perception on the quality of current training programs*

Question: In general, how do you evaluate the quality of the current training programs for TGs in Sri Lanka?

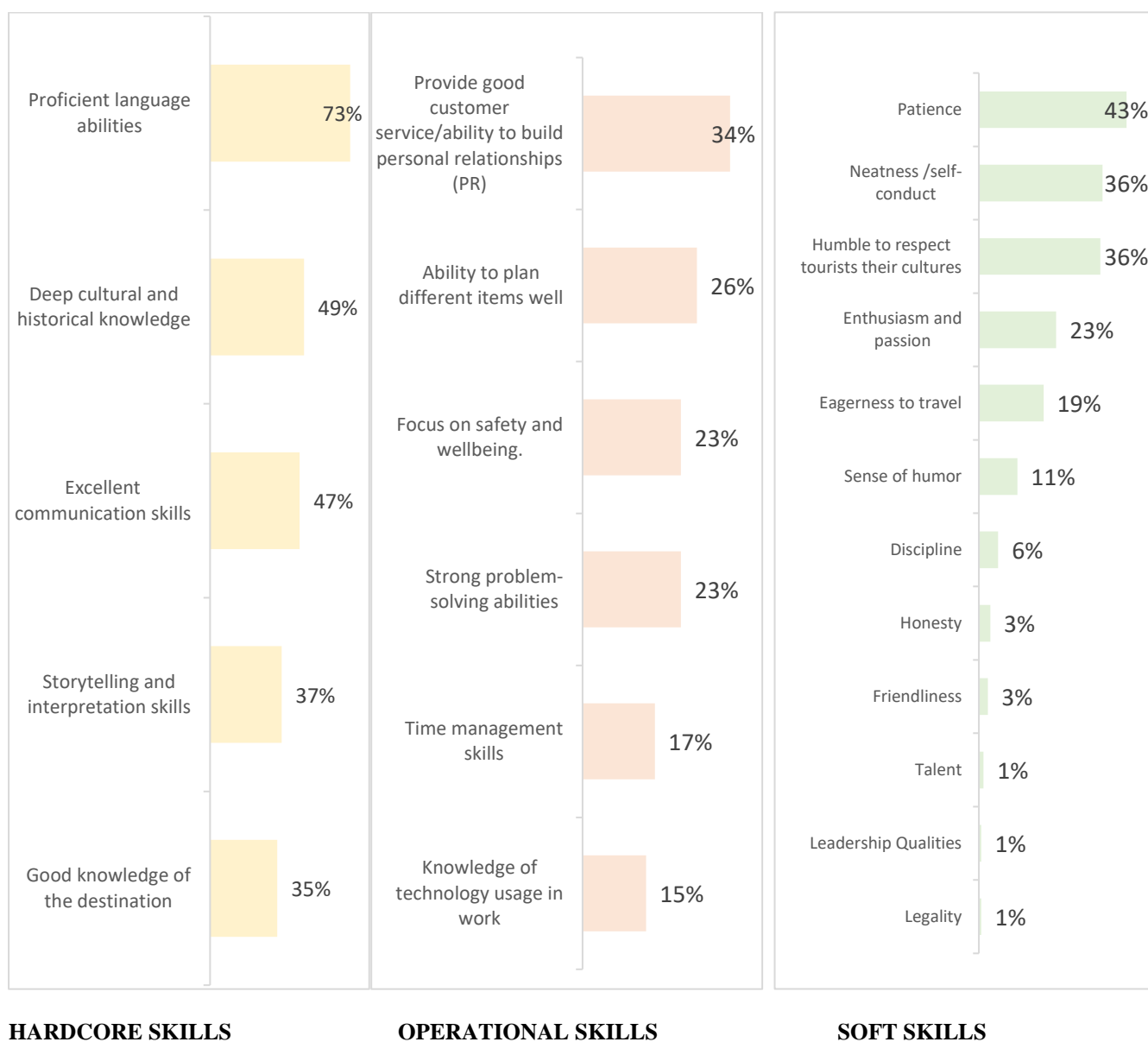
Survey Sample: 32 Tour Operators



The Most Important Skills/Characteristics of a Tour Guide

According to data in the figure below (*Figure 68*), the most critical skills for TGs are language skills, knowledge of cultural history, and excellent communication skills, which will enable great storytelling, a good understanding of the destination, and easy navigation. Further, providing good customer service, planning, focus on safety and well-being, and problem-solving are vital when operationalizing the entire journey. Personal characteristics such as patience, neatness, humility, and respect for tourists and their cultural beliefs would make TGs' service unique.

Figure 68: The most essential characteristics and skills that TGs should develop



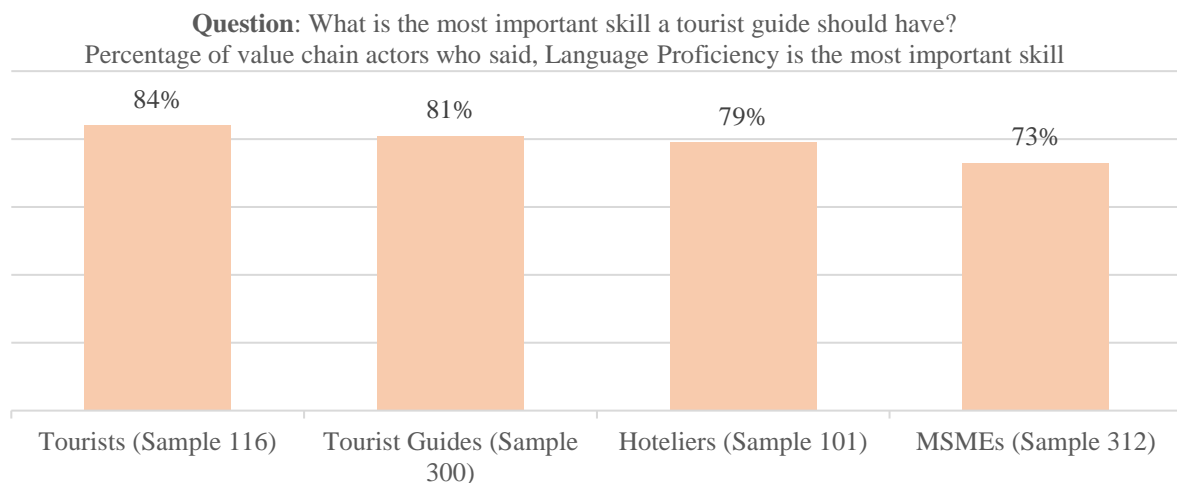
Language Proficiency

According to the European Committee for Standardization (CEN), *European Federation of Tourist Guide Associations*, n.d. (EFG), and the WFTGA, a TG is,

“a person who guides visitors in the language of their choice and interprets the cultural and natural heritage of an area, which person normally possesses an area-specific qualification usually issued and/or recognized by the appropriate authority.”

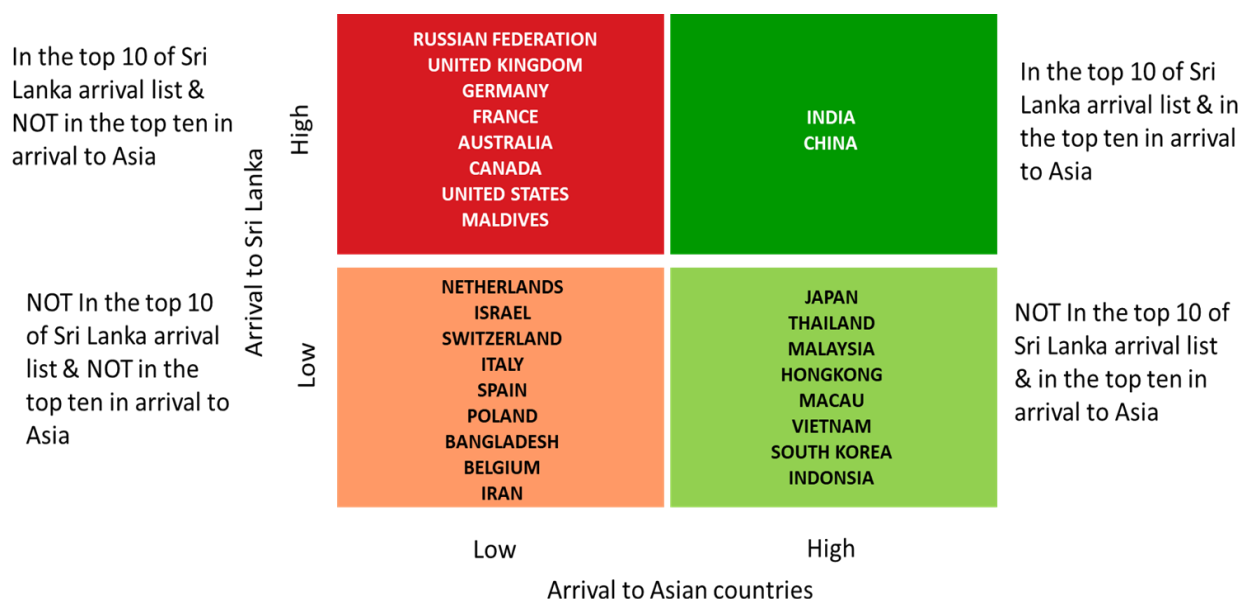
This definition emphasizes that TGs' language skills are a fundamental requirement. Therefore, the emphasis TGs should have on enhancing language skills is critical. Similarly, most stakeholders subjected to this survey, such as tourists, tour operators, hoteliers, and MSMEs, have mentioned that language skills are the most vital requirement for a TG.

Figure 69: What is the most critical skill a tourist guide should have?



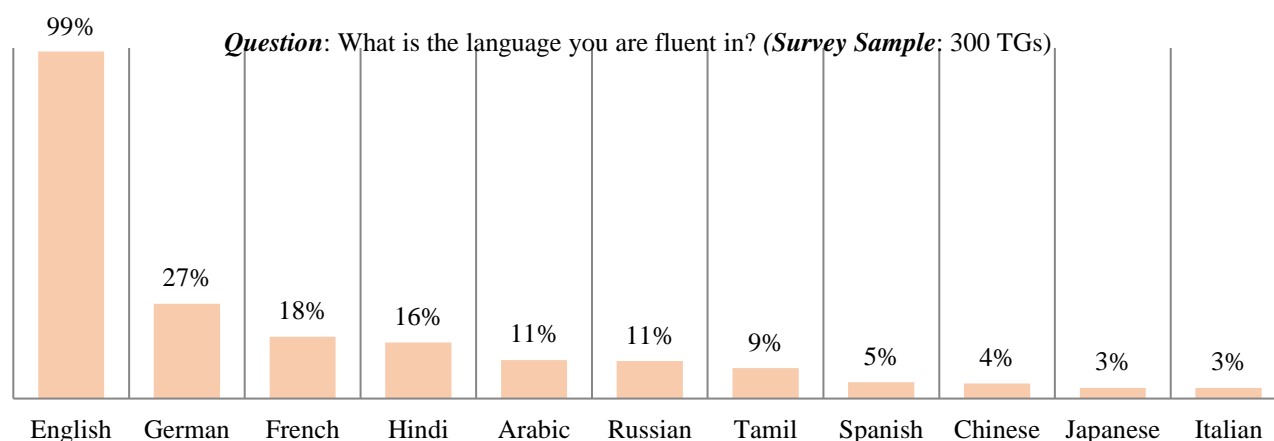
It is unarguable that the ability of TGs in Sri Lanka to speak English, Russian, German, French, and Mandarin are critical to ensure an enjoyable and memorable visit for most tourists. Based on the most recent statistics published by SLTDA as presented below, it is clear that Indians and Chinese are the most extensively attracted tourists to Sri Lanka. Russian, British, German, and French are more attracted to Sri Lanka than to other Asian countries. Therefore, it is clear that the demand for TGs can be increased by preparing them to speak these languages.

Figure 70: Language skills prioritization based on the type of tourists for Sri Lanka



As discussed above, one of the important factors observed is that fewer TGs can speak other foreign languages except English. The following figure demonstrate this fact. It was noted that Ninety-nine percent of TGs stated that they are fluent in English. However, not even 30 percent of TGs can speak other important foreign languages like German, French, Mandarin, Hindi, etc. Therefore, taking steps to fill these language proficiency gaps among the TGs is paramount.

Figure 71: Sri Lankan TGs 'speaking abilities



Interpretation and Storytelling Skills

Language enables TGs to be good interpreters and storytellers, making the journey exciting for tourists.

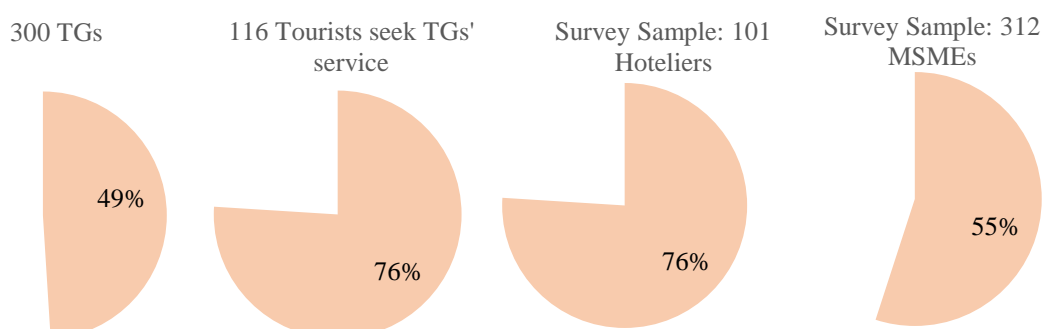
“Compared to countries such as India and South Africa, Sri Lanka lacks the ability of guides to interpret and tell stories, which help tourists visualize things. The skill of interpretation is different from being able to speak a foreign language.” - Public and private sector experts

As public and private sector industry experts revealed, interpretation is also an important skill for TGs. However, it was concerning that only 37 percent of the TGs identified storytelling and interpretation skills as critical talents TGs should possess, as presented above (refer to [Figure 68](#)).

Deep Culture and Historical Knowledge

Further, quantitative surveys showed 49 percent of TG identified “Deep Culture and Heritage Knowledge” as an essential skill TGs should have to perform well in their role. However, a large majority, which is 76 percent of tourists, have stated that having deep cultural and historical knowledge is vital for a TG to work well. Similarly, 76 percent of hoteliers identify the same, followed by 55 percent of MSMEs. Therefore, it is essential that knowledge of the culture and history of the country and each destination and place in the country would add value to a TGs service levels.

Figure 72: Deep cultural and heritage knowledge is an important skill



Cultural Relativism

As discussed above cultural sensitivity in TGs' work is highlighted as a key requirement as per the guidelines of WFTGA. However, the Sri Lankan TG Curriculum lacks a thorough focus on cultural sensitivity. This incident underscores the critical need for comprehensive training for TGs, emphasizing respect for tourists' religious beliefs and privacy. Integrating concepts like cultural relativism into training programs is essential to prevent ethnocentrism.

Cultural sensitivity is highly valued by tourists and vital for a positive experience. The following quotation will explain the incident faced by a "UK Couple" and demonstrate the urgency of cultural relativism as a skill for TGs.

"There were several experiences, which were very disappointing with a TG. One that stands out was when we visited the Temple of the Tooth in Kandy. The TG insisted that we participate in a worship ceremony, even though we told him we don't follow any specific religion. We respect all religions, but we don't engage in rituals. Despite our objections, he kept pushing us to do things we weren't comfortable with. And then, after we politely declined to participate, he got quite upset. He even complained to the hotel, saying we disrespected the local culture. It was just too much." - UK Couple describing an incident that happened during their tour.

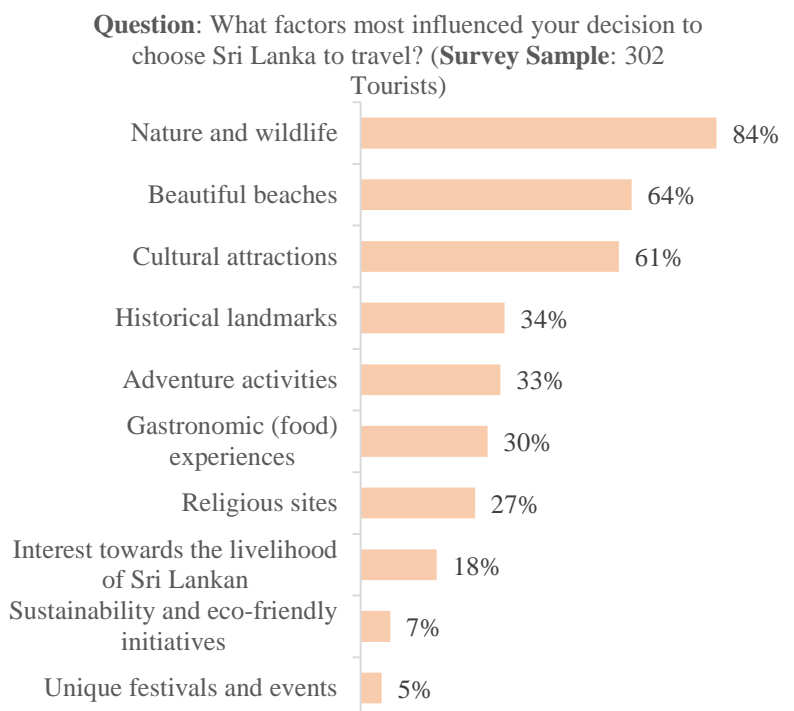
Following are the critical areas to be covered in Trainings on Cultural Relativism

- Guides must be trained to honor tourists' religious practices and personal space.
- Emphasize understanding and respecting different cultures to avoid ethnocentric behavior.
- Tourists value guides who are aware of and sensitive to cultural differences, enhancing their overall experience.
- Forceful actions damage the reputation of Sri Lankan TGs and the destination.

Nature, Wildlife, and Beautiful Beaches are USPs of Sri Lanka

Figure 73: Key areas to choose Sri Lanka as a travel destination - Tourists

Undoubtedly, many tourists choose Sri Lanka as a travel destination to experience its cultural and historical aspects. However, many experts and value chain actors believe that TGs' knowledge should be diversified and go beyond the country's cultural and historical sides. From tourists' point of view, many factors impact choosing Sri Lanka as a travel destination, and nature and wildlife, beaches, and cultural attractions top the list. Therefore, TGs must possess the knowledge and ability to introduce and interpret sites that demonstrate the properties of nature and wildlife, beautiful beaches, and culturally attractive sites.



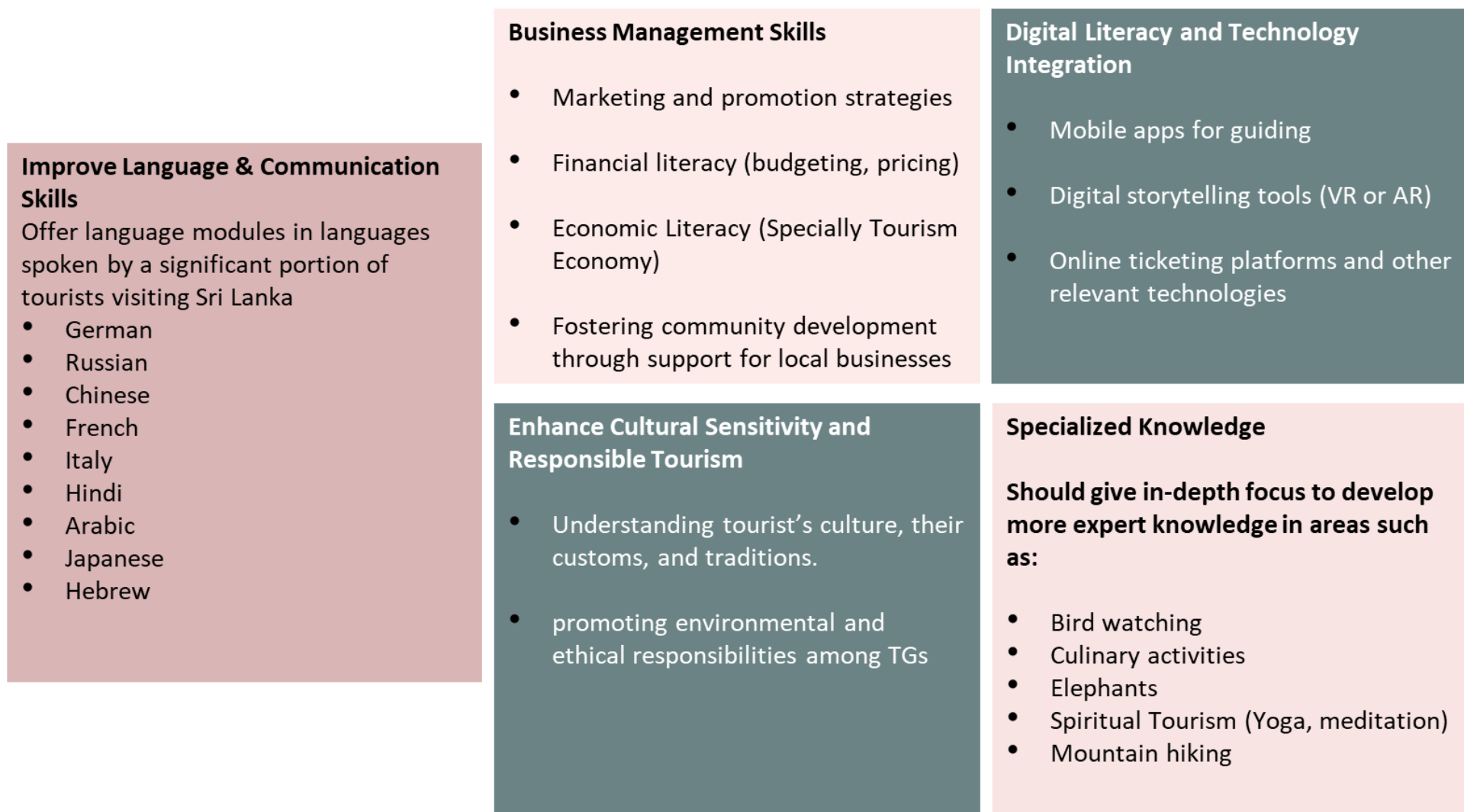
Groom Tour Guides from General Skills to Specialized Skills

Interpretation in the context of tour guiding extends far beyond the conventional boundaries of providing basic information and translation services. It involves offering a deeper and richer explanation that enhances the tourist experience in various innovative and engaging ways. Unlike mere oral translation, interpretation delves into the nuances and significance of the subject matter, creating a more informative and entertaining interaction for tourists. This enriched interaction enables visitors to connect with the essence of Sri Lankan culture, heritage, and natural beauty on a more profound level.

The concept of specialized interpreters is a novel initiative proposed by the SLITHM. These interpreters are experts in diverse fields such as **History, Culinary Arts, Anthropology, Buddhism, Irrigation, Architecture, Arts and Painting, Marine Biology, and Elephant Conservation**. Their expertise allows them to provide tourists with in-depth insights and a more immersive understanding of these specific areas. For example, a historical interpreter would not only recount events but also explore their cultural and social impacts, while a culinary interpreter would share the stories behind traditional Sri Lankan dishes, their ingredients, and their significance in local customs. This approach aims to offer tourists a more authentic and enriched experience by engaging them with stories, facts, and hands-on experiences that are both educational and entertaining. Through specialized interpretation, tourists can appreciate the intricate tapestry of Sri Lanka's heritage and natural environment, making their visit not just a trip but a journey of discovery and connection with the island's true spirit.

Summary of Critical Coverage of Curricula for Tour Guides

Figure 74: Areas to be covered in the Future Sri Lankan TG Training Curricular



Skills Requirement Analysis Using Onion Framework

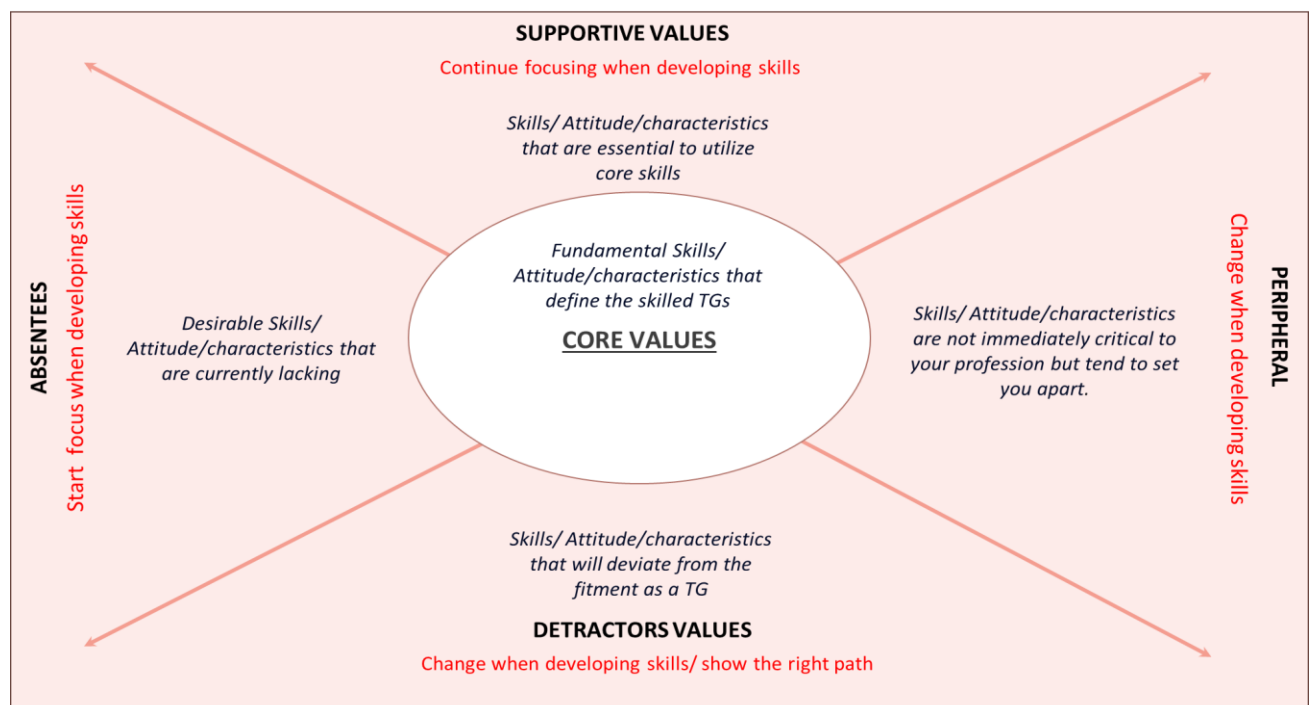
When developing the skills essential for TGs, it's important to categorize them based on their relevance and impact on professional performance. At the core, TGs should focus on developing fundamental skills, attitudes, and characteristics needed to become a TG and fit into that role, such as effective communication, deep knowledge of local history and culture, empathy, and reliability. These core competencies are essential and must be prioritized to ensure the highest level of service and authenticity in guiding. In addition to these core skills, supportive skills are integral to utilizing core skills.

On the peripheral level, specific skills, attitudes, and characteristics, while not immediately critical, can distinguish a TG from others. These might include specialized knowledge in niche areas like marine biology or culinary arts, advanced customer service techniques, and leadership abilities. Though not central to the core guiding functions, these attributes add substantial value and can elevate a guide's professional standing.

Next, detractors have skills, attitudes, and characteristics that, if overemphasized, could lead to a deviation from the essential qualities of a TG. These might include negative attitudes, lack of personal grooming, etc..

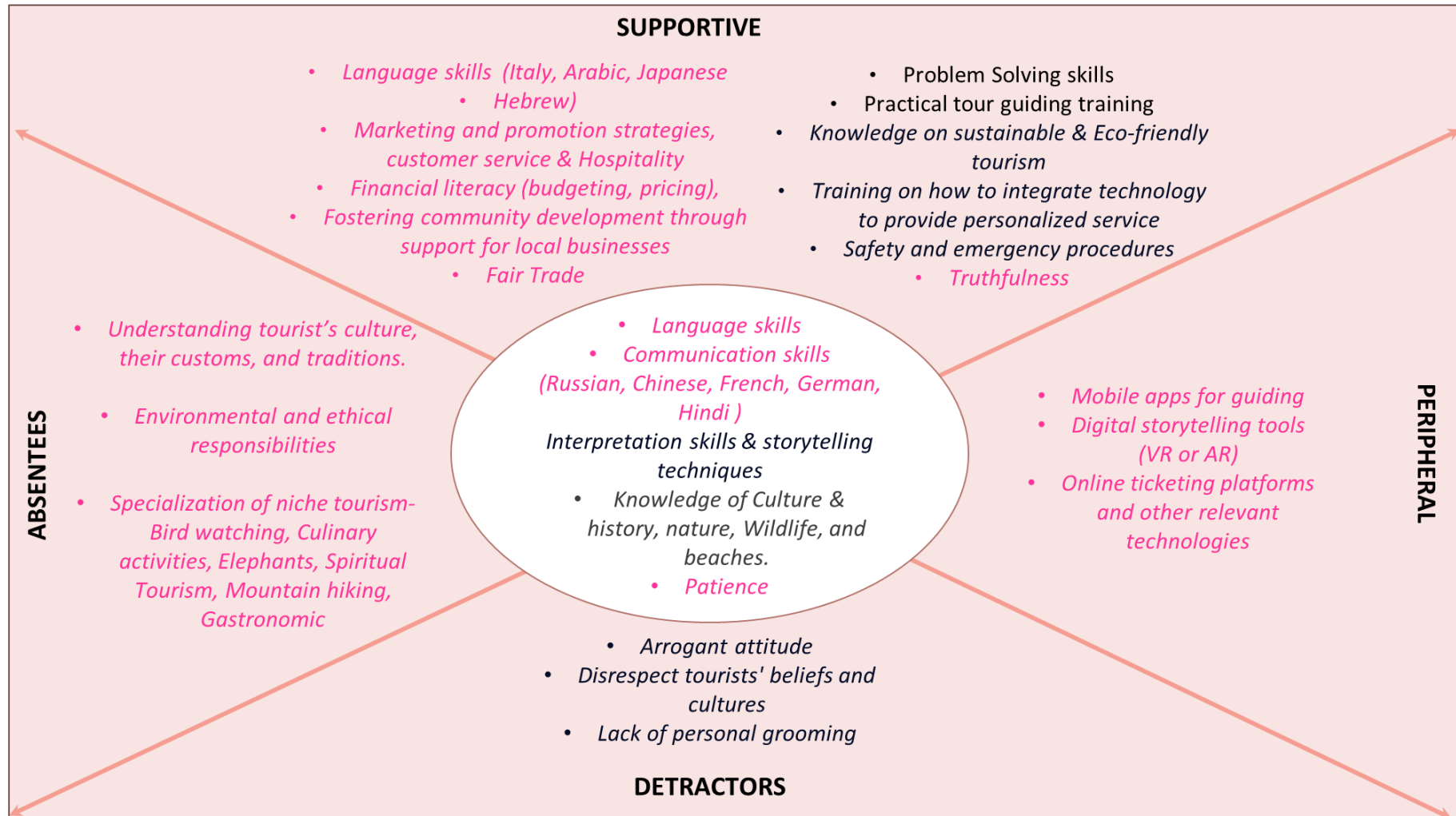
Finally, absentees are skills required to create a unique tourist experience—cultural sensitivity, ethical responsibility, etc.

Figure 75: Onion Framework for Skills Analysis



Below are the findings on the Onion framework. The areas highlighted in pink fonts currently lack regions of TG, which should be considered at training. Areas listed under detractors should be eliminated that will detract from being a unique TG (refer to [Figure 76](#)).

Figure 76: Union Framework for Skills Analysis - Skills of a TG



Chapter Summary 10 : Training Needs for the TGs to Prepare for the Future

This chapter delves into the critical training needs essential for TGs in Sri Lanka to prepare them adequately for the evolving demands of the tourism industry. It begins by assessing the current state of TG training in the country, which is predominantly sourced through SLITHM as indicated by survey data from tour operators. While a significant proportion of tour operators find the existing training courses comprehensive, with a majority acknowledging their quality, there exists a notable segment that feels overwhelmed by the comprehensiveness of the training provided. The chapter underscores the importance of key skills and characteristics deemed indispensable for TGs. Language proficiency stands out prominently, with English, Russian, German, French, and Mandarin identified as crucial languages due to the diverse international tourist demographic visiting Sri Lanka. However, there is a significant gap in multilingual proficiency among TGs beyond English, highlighting an urgent need for targeted language enhancement programs. In addition to language skills, the chapter emphasizes the criticality of interpretation, storytelling abilities, and deep cultural and historical knowledge among TGs. These skills not only enrich the tourist experience but also ensure a deeper connection with Sri Lanka's cultural heritage and natural beauty. Concerns are raised regarding the current emphasis on these skills in the existing TG curriculum, urging a more comprehensive integration of interpretive and cultural sensitivity training. Cultural relativism emerges as a pivotal aspect lacking in the current TG training framework, despite its crucial role in respecting tourists' cultural beliefs and practices. Instances of cultural insensitivity highlight the need for rigorous training programs that foster an understanding and appreciation of diverse cultural perspectives among TGs. Furthermore, the chapter advocates for broadening TGs' knowledge beyond cultural and historical domains to encompass Sri Lanka's unique natural attractions such as wildlife, beaches, and environmental conservation efforts. This holistic approach aims to equip TGs with diversified expertise that aligns with tourists' varied interests and enhances their overall visitor experience. The Onion Framework for skills analysis is introduced to categorize and prioritize essential, supportive, detracting, and absent skills critical for TGs. This framework underscores the need to prioritize core competencies such as effective communication, cultural understanding, and professionalism while mitigating detracting factors that could detract from the quality of TG services. In conclusion, the chapter calls for a strategic overhaul of the Sri Lankan TG training curriculum to address identified gaps comprehensively. By integrating enhanced language proficiency, cultural sensitivity training, and specialized knowledge of natural and cultural heritage, Sri Lanka can position its TGs to deliver exceptional and culturally respectful tourism experiences that meet global standards and exceed visitor expectations.

CHAPTER 05: CONCLUSIONS

Based on the findings discussed throughout the document, the following conclusions can be drawn.

Current estimated size of TGs pool in Sri Lanka:

- As recorded by SLTDA, there are 4887 licensed TGs by March 2024, which indicates a 5-6 percent growth since November 2022.
- This licensed TG pool comprised 1,892 National TGs, 1,552 Chauffeur TGs, 104 Site TGs, and 1,339 Area TGs.
- According to the survey findings, including unlicensed TGs, there is 32 percent of National TGs, 25 percent of Chauffeur TGs, 4 percent of Site TGs, 16 percent of Area TGs, and 23 percent of unlicensed TGs in the country.
- Applying this incident rate, it was estimated that there are 6347 TGs, including both licensed and unlicensed.
- However, the unlicensed TG space is fragmented, and hence, it is fair to assume that this estimate would not cover all other informal TGs, such as Tuk-Tuk drivers, city boys, surf boys, etc.

Characteristics of TGs in Sri Lanka:

- Female representation of TGs is low to the level of 3 percent, whereas there is less than 10 percent female representation in the tourism sector workforce in the country. However, a few female TGs are known to be the best talent.
- The mixed age group, starting from 35, makes up the majority. There is a clear older age skew among the National and Chauffeur TGs and a younger skew among the unlicensed TGs.
- The education level of National TGs shows a clear difference with the rest who are low level in education qualification.
- Freelancer working arrangements seem to be the common pattern among TGs, with a higher freelancer segment among the Site, Area guides, and unlicensed TGs.
- Tour Guiding is the primary income source for the large majority who depend on it for living, however, nearly 1/5th of National, Site, & Area TGs seem to have another primary source of income, making TG the second option.
- Similarly, a considerable segment of TGs (53%) consider tour guiding a passionate choice as much as it is their source of income. Many National TGs consider their job equal to their passion.

- The majority of National TGs handle groups, which is prominent compared with others. Unlicensed guides seem to guide more Solo and family/couples.
- The most salient and hardest destination for the TGs to handle is India, as per the majority. TGs mostly handle German, British, French, Australian, and Russian clients.
- An average of 7-8 nationalities have been handled by an average TG.
- Accordingly, TGs believe that successful TGs should have fluency in English, with Russian, German, French, and Chinese, to service most tourists coming to the country.
- It is notable to see, many have fluency in English, but very few, around 30 percent, can speak German. TGs who can speak the other needed languages such as Chinese, Japanese are very few in the country.
- It is pleasing to see a few multilingual TGs, especially the licensed TGs, in the country.
- However, fluency in a language other than English seems to be a critical issue faced by the TGs in the country.
- Nonetheless, an average 2-language capability is shown by a TG, with less fluency in a second language other than English. However, the observation of other value chain actors in the English fluency of some TGs seems concerning.

The current level of importance of TGs, satisfaction, and dissatisfaction with their performance:

- Considering the critical role of TGs, Tour Operators consider TGs as a highly important segment of value creators for the industry.
- Hoteliers and MSMEs place a high importance on TGs for the industry and their businesses; however, it is not as overwhelming as that of Tour Operators.
- Remarkable concerns were highlighted by a few MSMEs about the conduct of TGs, especially being dependent highly on commissions rather than aiming at giving experience to their clients.
- Nonetheless, licensed guides are respected by tourists, as observed by hoteliers and MSMEs in the field. However, again, nearly one-fifth of MSMEs mentioned that tourists do not respect TGs as they have experienced.
- Still, tourists' satisfaction with TG service is at a healthy level, which means 48 percent are promoters, 37 percent are passive, and 15 percent are detractors in terms of recommending TG service. The recommendation for TG service is visibly lower among the middle-aged (36-45) segment of tourists compared to the younger and older tourists.
- However, satisfaction with TG service is low among hoteliers and remarkably low among MSMEs for the same reasons discussed above.

- Neither, accessing nor finding TGs is very easy for tourists.
- The majority of tourists (22% and 29%, respectively) use Recommendations from family/friends and travel agents to find TGs. Another 20 percent of tourists said that they use online methods. They are mainly younger tourists.

The motivations and challenges faced by the TGs in Sri Lanka:

- Majority of TGs' motivations to choose tour guiding as their living are independence, pride in representing the country, interest to travel, and passion for sharing culture heritage, followed by many more such as attached respect, desire to meet people and storytelling.
- However, very few started tour-guiding for reasons such as the thrill of being involved in outdoor activities, financial benefits, and career growth-related aspects.
- Nonetheless, it is critical to note how the motives changed when they started tour guiding and to continue in the job. The large majority's motive to continue guiding is financial benefits, and other motives come next.
- Among many challenges, the most critical is the lack of support and coordination by the authorities, the threat of foreigners coming with their interpreters and leaders, digital trends, seasonal impact due to the freelance nature of the job by many of the TGs, limited facilities, and accommodation when travelling with guests, lack of training, licensing process, and hence the identity of the TGs. Licensed TGs mentioned the competition from the unlicensed TGs as a challenge they are facing.
- Among these challenges, digital nomadism seems to be a larger trend that is common for all countries and has the potential to disrupt TGs' opportunities.

The estimated need for TGs in Sri Lanka & Future trends:

- 43 percent of tourists interviewed stated that they received TGs' service this season (Q1 2024) when they travelled to Sri Lanka. Compared to the TG service usage statistics published by SLTDA in 2018 indicate an increase in TG service usage, although a direct comparison is not possible between the two studies.
- 91 percent of the 43 percent who used the TG service plan to use the TG service next time, which indicates that around 40 percent of tourists will use the TG service when visiting next.
- However, only 64 percent of those who used TG service in the previous visit have used TG service this time, which means repeat usage is only 64 percent.
- The large majority of tourists are first-time visitors to the country, which is 78 percent. And 45 percent of first-time visitors use the TG service.
- Further, it is important to note that 64 percent of those who have used TG services in Sri Lanka have been exposed to TG services in other countries.

- This means 64 percent of the 43 percent who have used TG service in Sri Lanka (which is 27%) would be habitually using TG service when they are traveling, and hence, it is fair to assume that minimum TG service usage could be dropped to 27 percent in the next season,
- Therefore, for planning purposes, a maximum of 40 percent- minimum of 27 percent TG service usage could be expected in the coming season.
- Taking this minimum and maximum TG service usage estimation into consideration and considering the 4 million tourist target the ministry is aiming to achieve in 2030, it was estimated that the total number of National and Chauffeur TGs required for 2030 will be 9336.
- It was found that there is approximately 25 percent of National and Chauffeur TGs turnover could be expected due to migration and other reasons, and hence, we would have 2914 in the pool, and a maximum of 9336 should be trained to meet the future demand.
- Nonetheless, the estimated number of unlicensed TGs is 1066; after absorbing that, only 8270 of the max pool of National and Chauffeur guides should be trained new. NTG, and CTG size would be after turnover 1848, then new recruitment of NTG & CTG need is 6422.
- Of course, these estimates are subject to any change in the number of tourists visiting the country and the impact of other factors, such as digitalization.

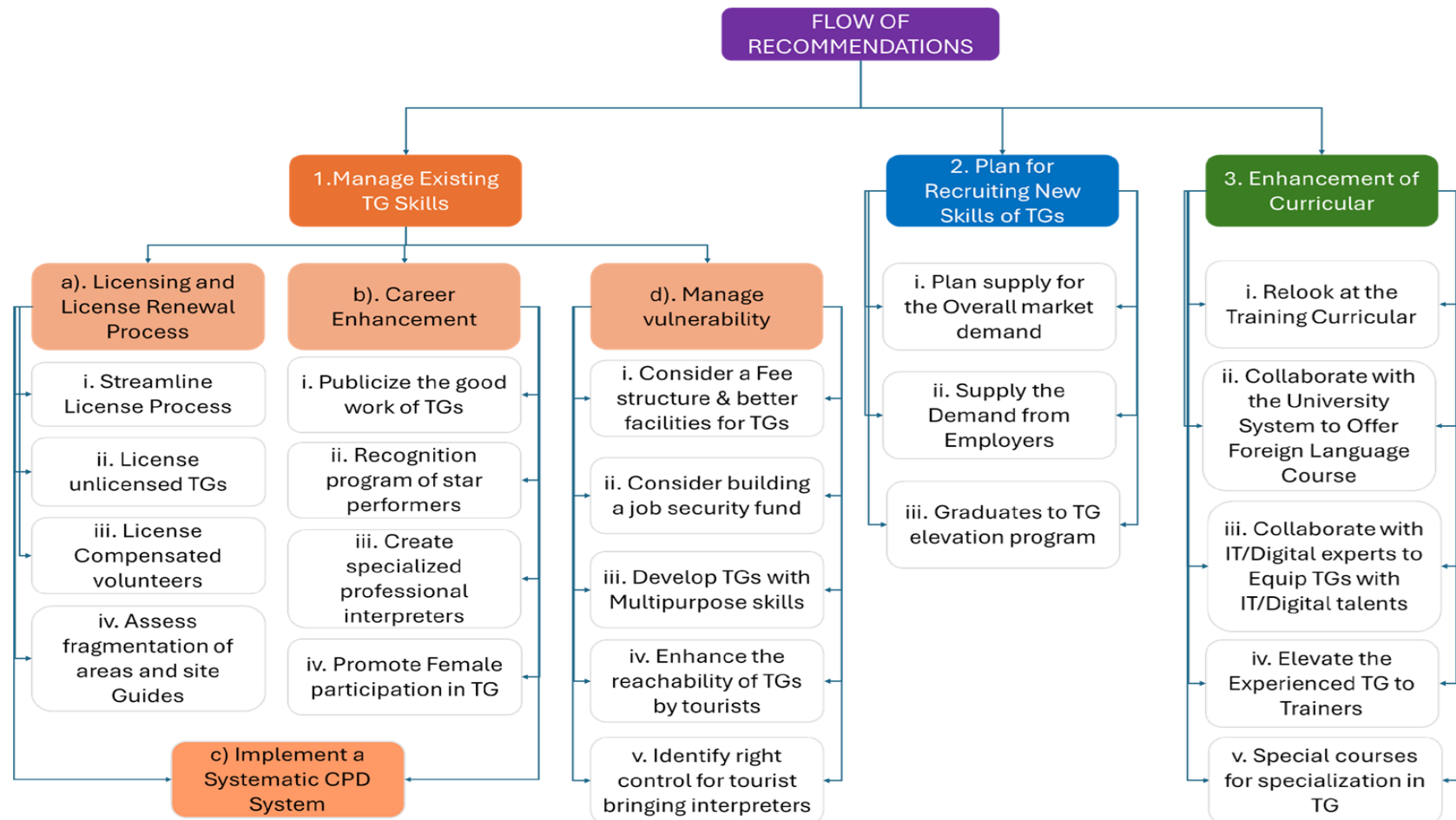
The estimated need for TGs in Sri Lanka & Future trends:

- The majority of TGs are aware of this and have taken some training, although they can not recall which training they attended.
- The larger segment of TGs is aware of the usefulness of the training, too.
- Overall evaluation of the training received by the TGs is pleasant as per the Tour Operators in terms of the comprehensiveness and the quality.
- Language proficiency, communication skills, cultural and heritage knowledge, and storytelling are critical areas to be trained in, and these are already included in the current training curriculum.
- Further, personality-related aspects such as work with patience, self-conduct, attire, and humility are highlighted as critical for a TG to be successful.
- It is crucial to note that TGs still do not realize the technological and digital challenges that will pressure them in the future.
- While culture and heritage deep knowledge would differentiate TGs, Sri Lankan nature, wildlife, and beaches are the most admired by tourists.
- It is also, clear that general TGs to specialization opportunities exist for TGs to elevate their status and to differentiated.

CHAPTER 06: RECOMMENDATIONS

The study's recommendations are thoughtfully categorized into three broad headings, as illustrated in the accompanying flowchart. These headings encapsulate the essential areas for improvement and strategic development based on the study's findings.

Figure 77: Recommendations flow chart



1. **Manage Existing Tour Guides' Skills:**

There is a large segment of TGs licensed and unlicensed identified in the study. Further, the study revealed that the identified size of TG segments could be an underestimated number due to the fragmentation of informal TGs. In this backdrop, below recommendations are suggested.

a) **Licensing and License Renewal Process:**

- I. ***Streamline License Process*** - Establish a clear, streamlined process for licensing TGs. After candidates have completed their pre-requisite trainings from SLITHM and other recognized associations, SLTDA should consider conducting an entrance exam/test/interview before issuing a license specially for the National TGs and Chauffeur TGs.
- II. ***License unlicensed TGs*** – Propose to implement a mechanism to licensing the unlicensed TGs. This mechanism should prioritize licensing the unlicensed guides who are having high level of language skills, commitment, and passionate of their job. The test of their past track records, reviews, and soft skills is vital. The study showed that there are unlicensed TGs working under tour operators. Therefore, collaborate with small scale tour operators in licensing of unlicensed would be a relevant approach.
- III. ***License Compensated volunteers*** – The study revealed that there are volunteers (including graduates) working as TGs for a small compensation paid by the government. It is important to identify such cohorts in the country and evaluate the skills and create a path for them to work as professional licensed TGs.
- IV. ***Assess fragmentation of Areas and Site Guides*** – Site guides and Area guides are scattered across the country and experts believe that there should be a higher number of such guides in the country who are not registered. Therefore, an initiative should be taken to build a database of TGs to register all who work as TGs in different sites and areas.

b) **Upgrade and Advanced Career of TGs:**

- I. ***Publicize the good work of TGs*** - Tourists' satisfaction with TG service was found great in this study. Conducting annual Tourist Satisfaction Surveys of TG service and publishing at all touch points where tourists interact will boost the publicity of the good work of TGs. This will help to increase TG service usage by tourists, boost TGs' motivation, and promote TG as a profession to enter by youths.
- II. ***Recognition program of star performers*** - Identify highly skilled performers in tour guiding and issue a special appreciation and recognition as star-class performers in the field. Inspiration can be taken from the UK Blue Badge system, which recognizes TGs for their performance.
- III. ***Create specialized professional interpreters*** - The TGs who can be elevated into niche tourism areas should be identified and provided special training. Further, this opportunity can be given to passionate people in or outside the industry who want to

become a specialized TG. This could be an opportunity and motivation for more educated people/ graduates to enter the TG profession. They should be given an elegant designation, more than just an ‘interpreters, but with an adjective such as “*professional interpreters*”. It is important do a brainstorming to produce an elegant designation for this segment of TGs.

- IV. ***Promote Female participation in TG*** - Develop initiatives to encourage more female participation in the TG profession. This could include providing scholarships, creating a supportive work environment, and promoting success stories of female TGs, and award them special token of appreciations periodically.

c) Create a Systematic CPD System :

- Continuing Professional Development is a commitment to ongoing lifelong learning. CPD creates space for looking forward and identifying opportunities to learn something new, refresh existing knowledge, improve skills, or simply keep up-to-date with the latest developments within a particular profession or industry. Establishing a systematic CPD for the TG profession is crucial given the tourism trends and technology intervention at a fast pace. CPD will help TGs to establish their career development and the evidence of such career development can be used for marketing themselves as talented TGs.
- Further, CPD records/ certificates of participating in CPD courses, workshops, conferences, events, and eLearning courses, can be connected to the licensing and license renewal process.
- Further, Good records of CPD can be considered when selecting and grooming specialized TGs.
- CPD opportunities should be created not just traditional methods of classroom courses but also, opportunities for eLearning courses, or online certificate courses creating chances for TGs to take part in CPD programs at the time that fits them without taking time out from their working hours.

d) Manage Vulnerability and Resilience Development:

- I. ***Consider a Fee structure & better facilities for TGs***– It is proposed to consider a fee structure for the TGs based on their skills and talents. This would provide an opportunity to earn adequate to sustain in off seasons. Further, it is crucial to set bare minimum standards of facilities given for TGs who employee TGs to service their tourists.
- II. ***Consider building a Job Security and Insurance fund*** – To facilitate with living expenses of TGs during off-season, consider creating ***off-season Security Fund*** with the contribution of TGs’ income during season and with the partnership of relevant stakeholder who utilize, and manage TGs. However, further consultation should be done to finalize the best controlling mechanism of this Security Fund. National Tour Guide Lecturer Association (NTGLA) and Chauffeur Tour Guide Lecturer Association (CTGLA) could lead this initiatives as they have their strong membership.

- III. ***Develop TGs with Multipurpose skills*** - Training TGs with versatile skills to transfer knowledge to adjacent areas such as coaching, teaching their specialized areas, content creation etc. Developing multipurpose skills of TGs will reduce the vulnerability during off-season as they will be able to involve in other viable jobs. However, further research is needed to identify the multipurpose skills that can be trained to TGs and curricular for such programs.
- IV. ***Enhance the reachability/accessibility of TGs by tourists*** - There should be an online platform that is updated with profiles and track records of TGs that tourists can easily access so that they can easily find and choose their TGs. Especially in a market with many freelance, informal TGs, this online platform will ensure opportunities for good quality TGs.
- V. ***Provide necessary control for tourist bringing their interpreters*** – One of the major challenge for NTGs and CTGs is the trend of tourists bringing their interpreters when traveling to Sri Lanka replacing the role of the NTGs or the CTGs. Further, Russian and Chinese visitors living in Sri Lanka have started providing services for tourists who are coming from their countries. This needs regulatory control and attention to safeguard the business opportunities of NTGs and CTGs.
However, the main reason claimed by the tourists for them to come with their interpreters is the lack of language proficiency of TGs in Sri Lanka. Therefore, only regulatory controls will not bring sustainable solutions if not steps are taken to have TGs with foreign language fluency. It was also identified that language like Chinese and Russian would take considerably longer time to teach. Therefore, certain short term steps like hiring University students passed out with language qualification as translators of TGs or hiring them as TGs would be important.

2. Plan for Increasing Skills of TGs:

This study estimates that there is a need for new TG recruitment to cater to the 2030 tourism industry. Therefore, the below plans are suggested to increase supply side of TG skills.

- I. ***Plan supply for the Overall market demand*** – Supply side Associations and training institutes should plan the enrolment for training programs for new TGs based on demand estimation (**using demand-driven approach**). This study has estimated NTG and CTG requirement for 2030 tourists' inflow. However, training experts should re-look at the estimation with the current resources available, possible fluctuation in annual tourists' inflow and set a practical and pragmatic annual target of TG supply. The supply system of Site and Area guides should be further evaluated after estimating the current registered Site and Area guide size in a separate exercise.
- II. ***Meeting the Supply of TGs Required from Employers*** - Devise a mechanism to periodically gather the demand for TGs from Tour Operators. This means Tour Operators will place the request for trained TGs and SLITHM and other training associations can plan their trainings to cater to such trainings. Additionally, Tour Operators can request refresher or more advance trainings from SLITHM for their TGs preparing for the following seasons. The training fee can be invested by tour operators.

- III. ***Graduates to TG elevation program*** – Graduates with degrees in tourism, languages, or other related fields who wish to train as TGs can be offered exemptions from parts of the TG training if their subjects align with the required competencies. This would serve as an incentive for graduates to pursue careers as TGs. Additionally, this can be linked to on-demand training, where tour operators with a firm need for more TGs can sponsor the training of new candidates. This funding would provide tourism graduates with the necessary financial support and mentorship as they train to become TGs. With this system, graduates can commit to their training with the assurance of a guaranteed job upon completion.

3. **Enhancement of Curricular:**

- i. ***Relook at the Training Curricular*** – Enhance the existing TG training curricula to a comprehensive master curriculum referring to the tourism trends and global standards of TGs. This study will identify the following areas that should be considered adding to the current curricular.
- The curriculum should allocate a considerable number of hours to ***impart knowledge on Business Management Skills*** including Marketing and promotion strategies, Financial literacy (budgeting, pricing), Economic Literacy (Specially Tourism Economy), and Fostering community development through support for local businesses when guiding, etc.
 - The curriculum should allocate the necessary hours to ***impart knowledge on cultural sensitivity*** to TGs that should be considered when servicing their clients.
 - Other than above, ***soft skills*** include teamwork, handling fair trade when dealing with different stakeholders in the value chain, truthfulness, maintaining trust between stakeholders, working with patience, humility, self-conduct and attire is critical to improve TGs professional skills.

To make the TGs current and future skill set relevant to the market drivers, existing curricular and new training program requirements are investigated in this study. Based on the study findings, the below recommendations are made on curricula development for TGs.

- ii. ***Collaborate with the Universities to Offer Foreign Language Courses – Fluency in English, German, Russian, Chinese, and French*** is essential for TGs. There are enough English-fluent TGs to manage the current demand. However, collaboration with the University system to increase the foreign language skills of TGs is critical for supporting current tourism growth goals.
- iii. ***Collaborate with IT/Digital experts to Equip TGs with IT/Digital talents*** - Digital Literacy and Technology Integration should be taught to TGs to prepare them for future needs. Equip TGs with knowledge of digital tools and technologies, such as mobile apps for guiding, digital storytelling tools (VR or AR), and online ticketing platforms.

- This prepares them for future technological challenges. Collaborate with IT/Digital experts in the industry or outside the industry to impart this knowledge to TGs.
- iv. Elevate the Experienced TG to Trainers - A pool of well-experienced TGs is retiring from the profession every year. The best can be used as trainers to build the capacity of young guides. SLITHM can lead to conducting a Train the Trainer (TtT) for well-experienced retired TGs and adding practical lessons like ‘Walk the Talk’ to the curriculum to impart the experience to the young TGs.
 - v. ***Special courses for specialization in TG*** – The NTGLA can collaborate with the University system, and industry experts to create a curriculum for specialized tourism training, including bird watching, Culinary activities, Elephants, Spiritual Tourism (Yoga, meditation), Mountain hiking, ecotourism, etc. Further research can be done to identify the most viable and demanded specialized areas of demand by tourists.

CHAPTER 07: FUTURE RESEARCH

1. **Research is needed to identify transferable skill** sets that TGs can learn and develop to stay occupied during the off-season. Ideally, these skills should be aligned with tourism and tour guiding, but the primary goal is to provide TGs with opportunities to earn income during periods of low demand.
2. **Digital nomadism** was identified as a trend that is already significant globally and has impacted TGs’ profession. A deeper analysis should be carried out to find other case studies that demonstrate how TGs remain resilient to the impacts of digital nomadism.
3. **Tourists (Chinese and Russian) come with their interpreters**, or Chinese and Russians living in Sri Lanka play the role of guides when their nationalities come as tourists to Sri Lanka without using licensed TGs’ service, which is identified as a threat to the TGs in Sri Lanka. Future research is important to understand the severity of this trend's impact on the Sri Lankan TGs’ profession and career and to identify possible private sector and public sector interventions to manage the situation.
4. Future research should aim **to identify specialized areas where TGs** can develop advanced skills to enhance their job performance. Based on these findings, training programs can be designed to support the identified specialization topics.

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Annexures

Table 10: Overview of Tour Guide License mechanisms of many countries

Country	Availability of a National Licensing Mechanism	International Tourism Revenue % of country GDP ²	Notes	Licensing Issuing Mechanism
Australia	No	1.97%	There is no national system; requirements vary by state and territory. Voluntary certifications are available.	While there is no national license, some states or territories might have their own regulations or requirements regarding TGs.
Canada	No	1.0%	There's no single national licensing system. Regulations regarding TGs might be handled at the provincial or territorial level, so requirements could vary depending on where they want to work.	Regulations regarding TGs might be handled at the provincial or territorial level.
Germany	No	4.0%	Licensing varies by state; professional associations play a role.	The BVGD (Bundesverband der Gästeführer in Deutschland) is a national association for TGs. They offer training programs and certifications, but these are not mandatory to work as a TG.
United States	No	2.9%	Regulations regarding TGs can be handled at the state or even city level. In some cases, there might be no specific licensing requirements at all.	Regulations regarding TGs can be handled at the state or even city level. In some cases, there might be no specific licensing requirements at all.
India	No	0.6%	The Ministry of Tourism issues Regional Level Tourist Guide Licenses. These licenses are valid for a specific region within India, not throughout the entire country.	The Ministry of Tourism issues Regional Level Tourist Guide Licenses. These licenses are valid for a specific region within India, not throughout the entire country.
Mexico	No	6.7%	Generally, there are no licensing requirements.	No National License: No single, mandatory national licensing system issued by the federal government for TGs in Mexico. The National Institute of Anthropology and History (INAH) offers a well-respected certification program for TGs, particularly those working in archaeological sites
Russia	No	3.9%	The federal government doesn't issue a single, mandatory license valid throughout Russia.	Regulations for TGs might be handled at the regional level. Some regions or cities might have their own licensing or accreditation

² <https://www.unwto.org/tourism-data/global-and-regional>

Country	Availability of a National Licensing Mechanism	International Tourism Revenue % of country GDP ²	Notes	Licensing Issuing Mechanism
				systems for TGs operating within their jurisdiction.
New Zealand	No	2.9%	There's no single central government body issuing licenses for TGs that are valid throughout New Zealand.	Entry into the TG profession often involves gaining experience and skills while working.
Indonesia	No	2.2%	Indonesia doesn't have a single, nationwide licensing system issued by the central government. Licensing for TGs is handled at the regional level, with each province or regency potentially having its own regulations and processes.	The licensing process for TGs in Indonesia is handled at the regional level.
Argentina	No	1.9%	There's no clear indication of a single, mandatory national licensing system for TGs in Argentina. Similar to Indonesia, regulations for TGs might be handled at the provincial level. Different provinces could have their own requirements.	Some sources suggest that licensing might be handled at the provincial or city level. (https://www.argentina.gob.ar/interior/turismo)
Thailand	Yes	2.3%	The primary focus for TGs in Thailand revolves around business licenses for tour operators, not individual guide licenses.	Travel and TG businesses need a TAT (Tourism Authority of Thailand) license to operate legally. https://thailand.acclime.com/
Sri Lanka	Yes	1.2%	National Guides, Chauffeur Guides Area Guides Site Guides	The Sri Lanka Tourism Development Authority (SLTDA) is responsible for issuing TG licenses in Sri Lanka
United Kingdom	Yes	1.8%	<i>Blue Badge, Green Badge, and White Badge</i> qualifications available; requires extensive training.	Institute of Tourist Guiding in United Kingdom.
China	Yes		National TG Certificate is the primary license for TGs in China.	The National Tourism Administration (NTA) of China is responsible for issuing TG licenses. https://english.visitbeijing.com.cn/article/47ON6cDV5vb
France	Yes	3.2%	The official license is called the "Carte professionnelle de guide-conférencier" (Professional Card for Tour Guide-Lecturer)	The Ministry of Culture (Ministère de la Culture) is responsible for issuing TG licenses in France.

Country	Availability of a National Licensing Mechanism	International Tourism Revenue % of country GDP ²	Notes	Licensing Issuing Mechanism
Italy	Yes	5.7%	There are two categories of Licensed TGs in Italy Regional Guide National Guide	The licensing process is managed by the Ministry of Tourism or the Regional tourist board.
Turkey	Yes	3.2%	Licenses are specific to a region or zone within Turkey, allowing guides to operate within that designated area.	The Ministry of Culture and Tourism is responsible for issuing TG licenses in Turkey.
Brazil	Yes		The official license is called "Carteira Nacional de Guia de Turismo" (National Tour Guide Card).	The National Tourism Department (part of the Ministry of Tourism) is responsible for issuing TG licenses.
Singapore	Yes	2.6%	The official license is called the "Tourist Guide Licence."	The Singapore Tourism Board (STB) is responsible for issuing TG licenses in Singapore. https://www.stb.gov.sg/
South Korea	Yes	2.5%	The official license is called "Guiding Licence" and some other categories like Specialized TG License Foreign Language TG License	The Ministry of Culture, Sports and Tourism (MCST) is responsible for issuing TG licenses in South Korea. (https://www.mcst.go.kr)
Greece	Yes	6.0%	The official license is called "Άδεια Επαγγέλματος Ξεναγού" (Άδεια Επαγγελματος Xenagou), which translates to "Professional License for Tour Guide."	The Ministry of Tourism is responsible for issuing TG licenses in Greece. (en.mitos.gov.gr).
Malaysia	Yes	0.8%	There are two categories Basic Tourist Guide License Local National Tourist Guide License	The Ministry of Tourism, Arts and Culture (MOTAC) is responsible for issuing TG licenses in Malaysia. (https://www.motac.gov.my/).

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