



# Traveller Sentiment vs. Sri Lanka Tourism in the Time of COVID-19

An analysis of arrivals to Sri Lanka from key source markets

Sri Lanka Tourism Development Authority

March 2022



## Table of Contents

Introduction.....	2
Distribution of COVID-19 in the top primary and potential markets.....	3
Tourist arrivals to Sri Lanka from top primary markets.....	4
Tourist arrivals to Sri Lanka from top potential markets.....	12
COVID-19 cases, vaccination & tourist arrivals to Sri Lanka.....	16
Analysis.....	17



## Introduction

The tourism Industry, that was slowly finding its footing after the protracted devastation caused by the initial waves of COVID-19 still faces risk, with many countries still enforcing rules and regulations, in an effort to curtail the pandemic. First detected in November 2021, the highly transmissible Omicron variant of COVID-19 is driving an unprecedented surge of infections throughout the world. As of 14 March 2022, globally, there have been over 456,797,000 confirmed cases of COVID-19, including 6,043,000 deaths (WHO). As of 14 March 2022, a over 11,000,000,000 total vaccine doses have been administered globally. With the immediate response of the suspension of arrivals from Southern Africa, a wide range of restrictions, testing protocols, and quarantine measures were adopted by many countries, while other countries such as Singapore, Thailand and Japan closed their borders to all foreign travellers.

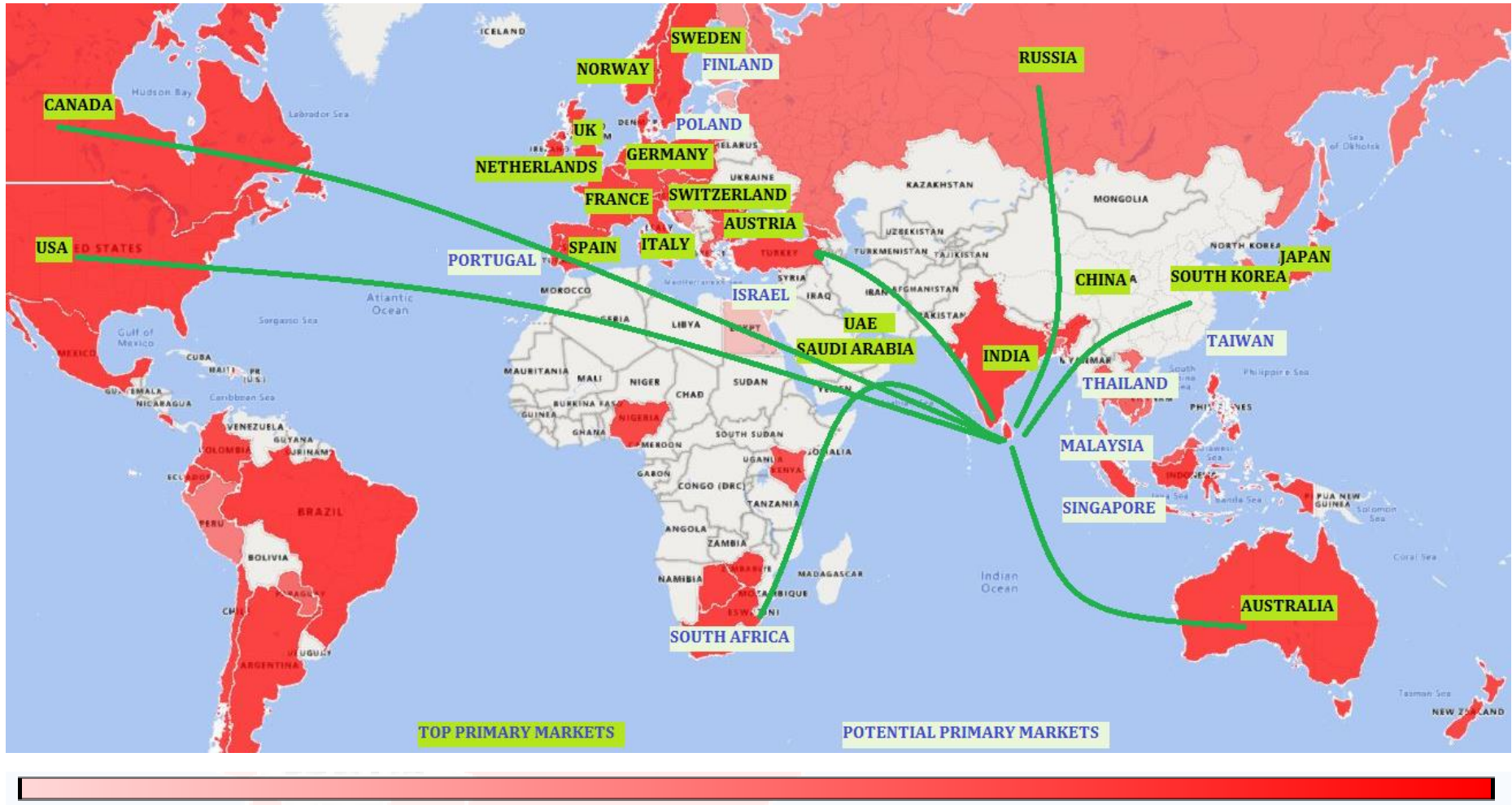
In response to this alarming situation, Sri Lanka also imposed travel bans to six African nations in the month of November, 2021. However, the travel ban was lifted in December with specific health protocols put into place.

Since the opening of Bandaranaike International Airport, total tourist arrivals recorded for 2021 was 194,495. Out of the total arrivals, the arrivals recorded for the months of November and December were 23% and 46% respectively (i.e., of the total annual arrivals). November being the onset of the peak season for tourist arrivals to Sri Lanka, provided a kick start for the Sri Lankan tourism economy. This growth momentum continued through December and January, 2022 and it is anticipated that it will continue until March 2022. Among the myriad of factors that affect tourist arrivals, the COVID- 19 pandemic and related conditions have become the most influential factor in affecting the traveller sentiment.

Therefore, the following document provides an analysis of the changing patterns of tourists from key source markets to Sri Lanka to understand overall travel patterns and potential recovery rates.



## Distribution of COVID-19 cases in the top primary markets and top potential markets of Sri Lanka



Zero level COVID cases/ No data available

Middle level COVID cases

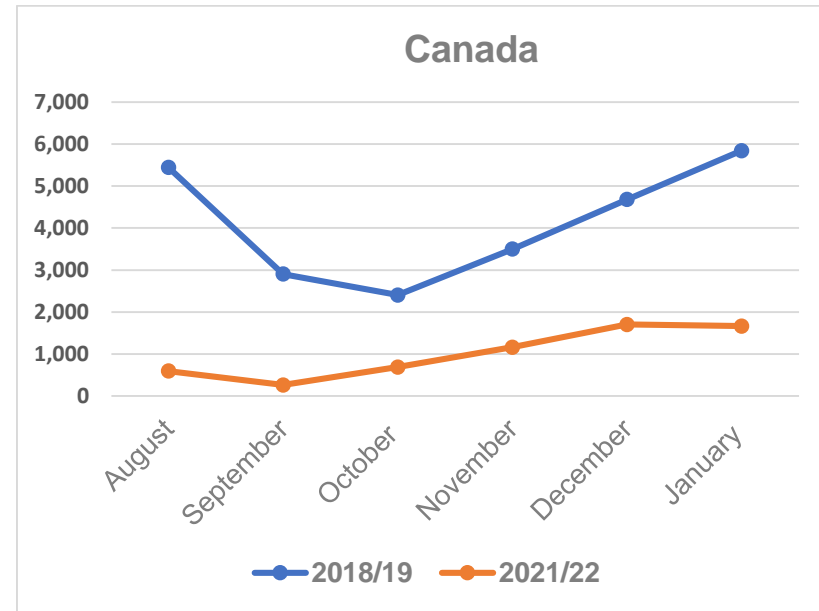
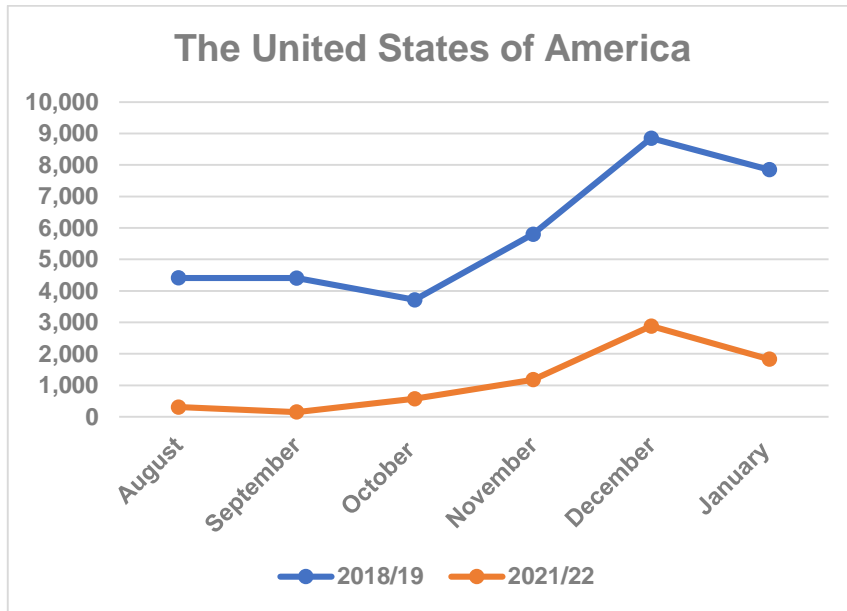
Higher level COVID cases



## Tourist Arrivals to Sri Lanka from Top Primary Markets\*

### Americas

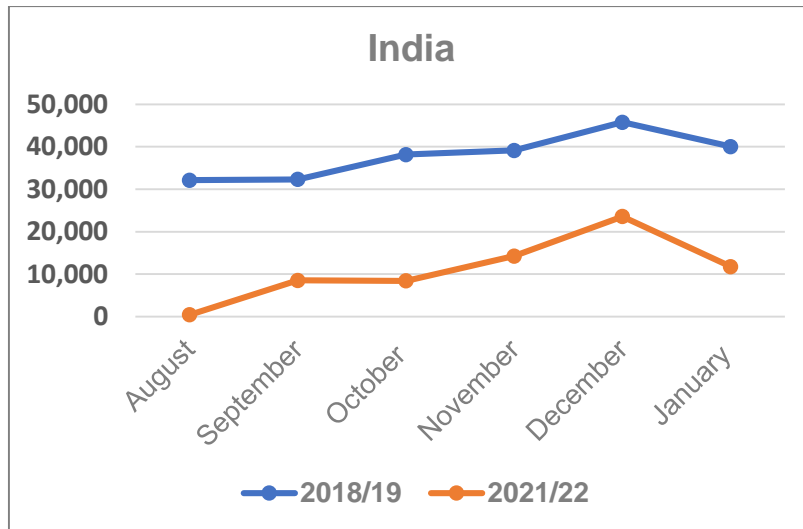
#### North America



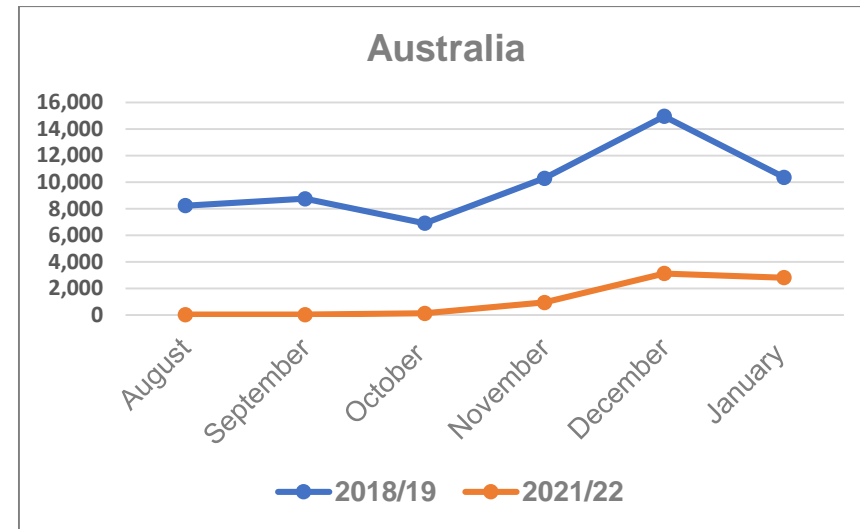


## Asia and the Pacific

### South Asia



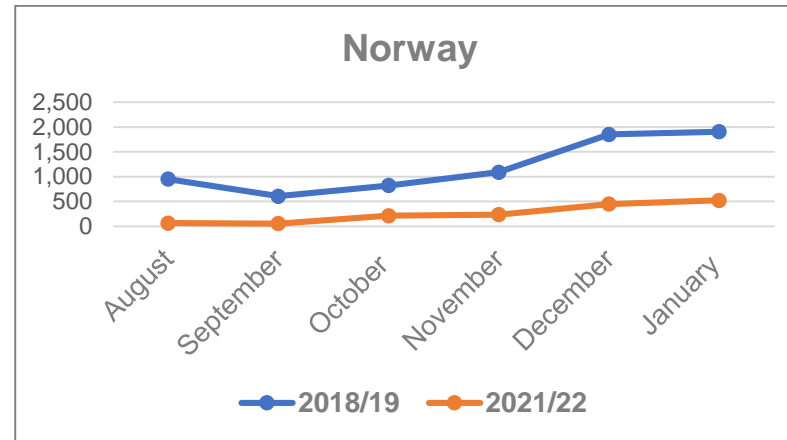
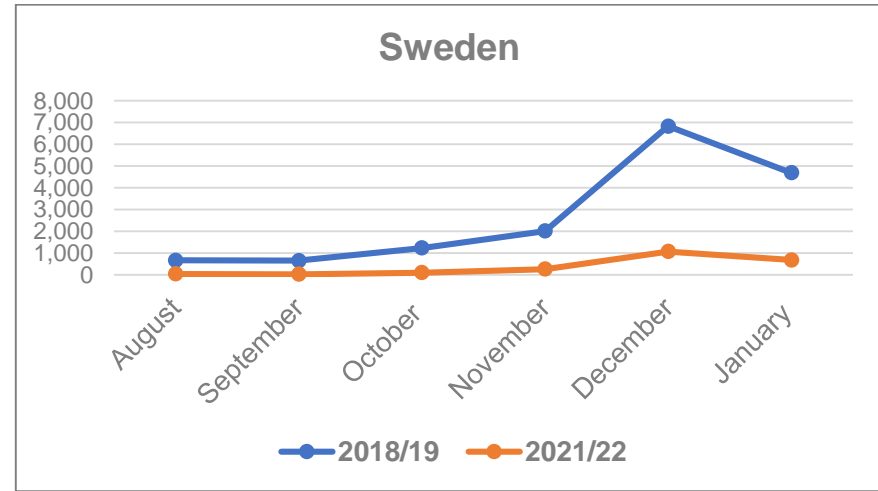
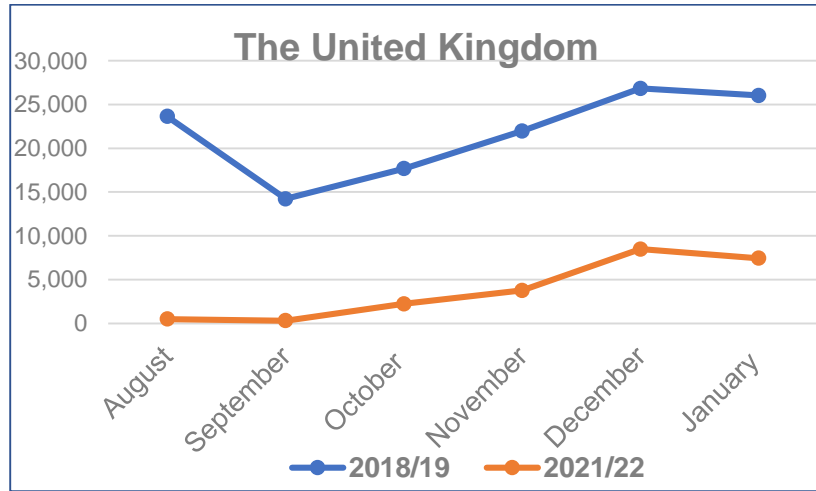
### Oceania





# Europe

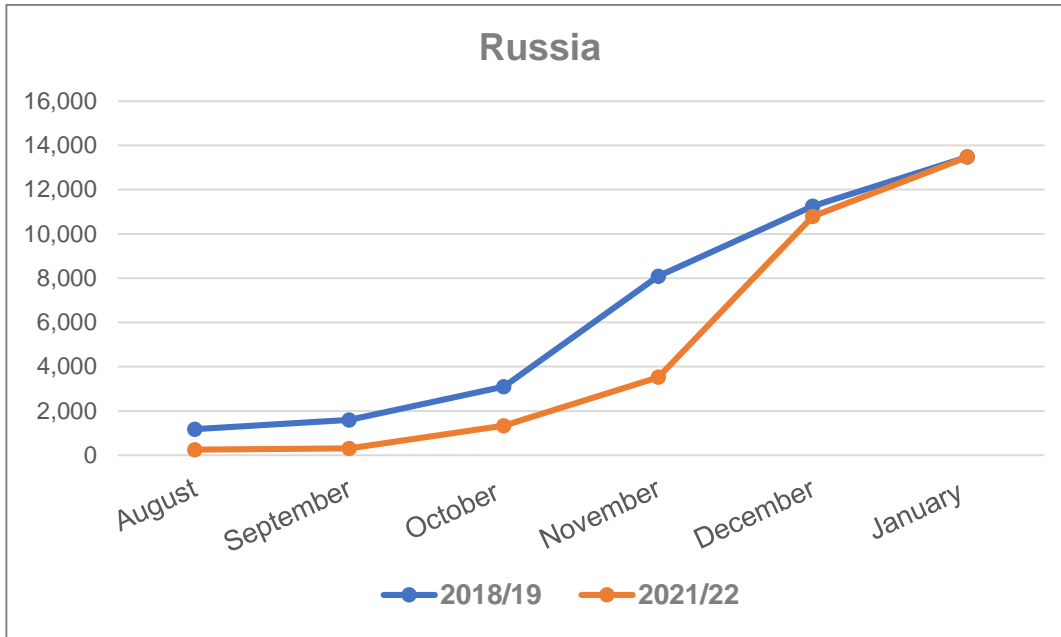
## Northern Europe





## Europe

### Central Eastern Europe

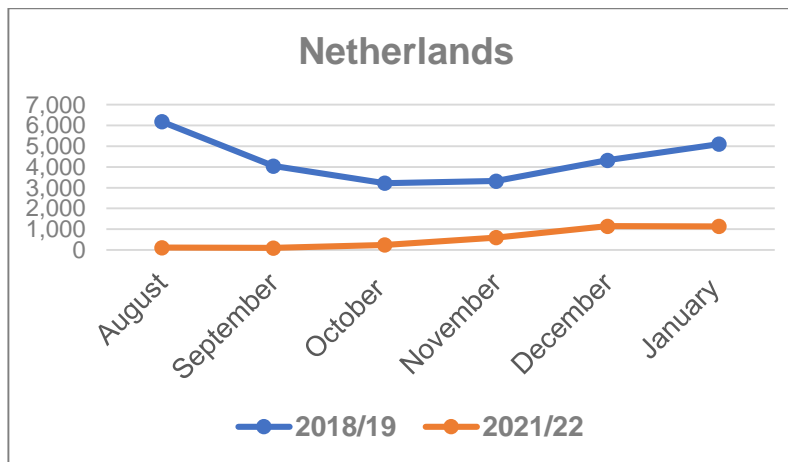
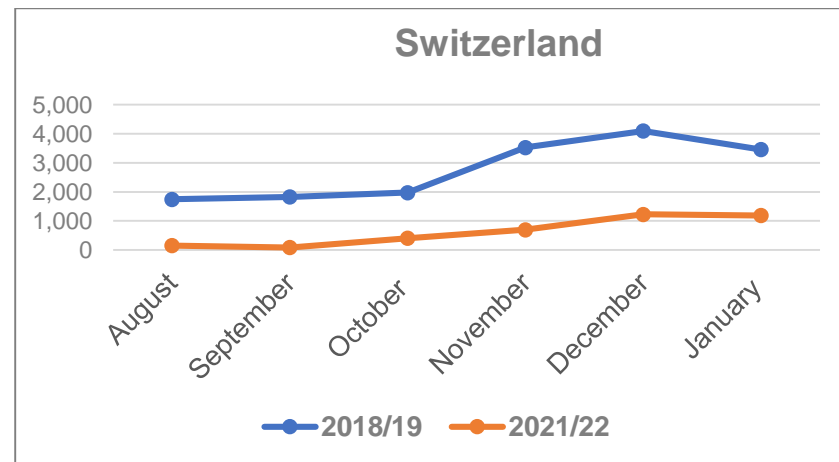
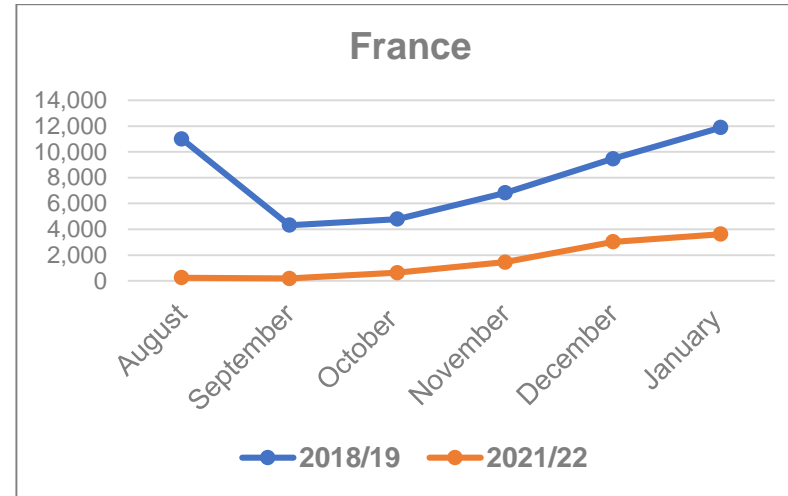
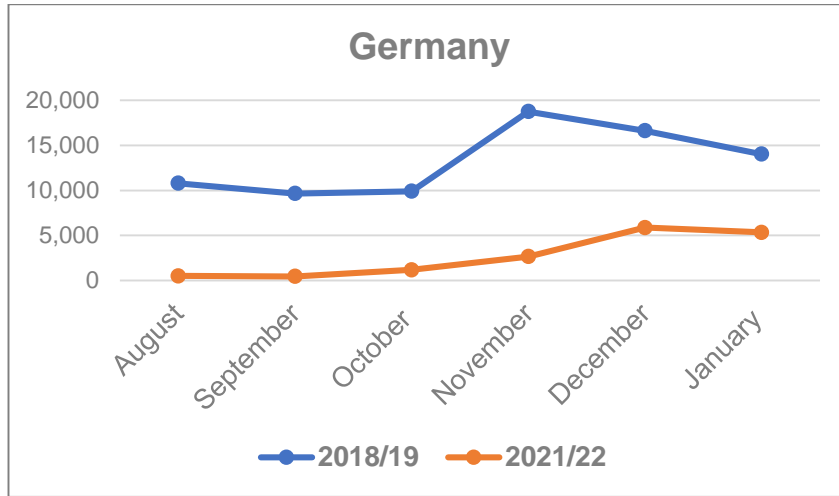


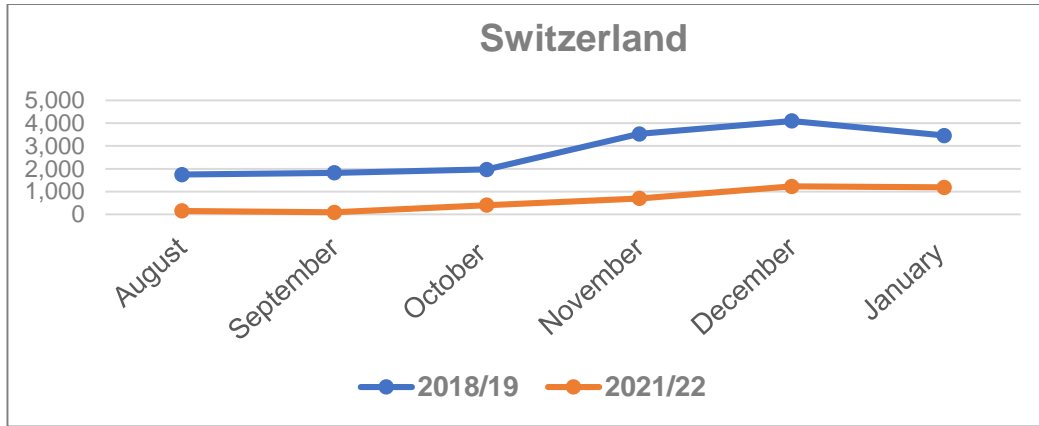




# Europe

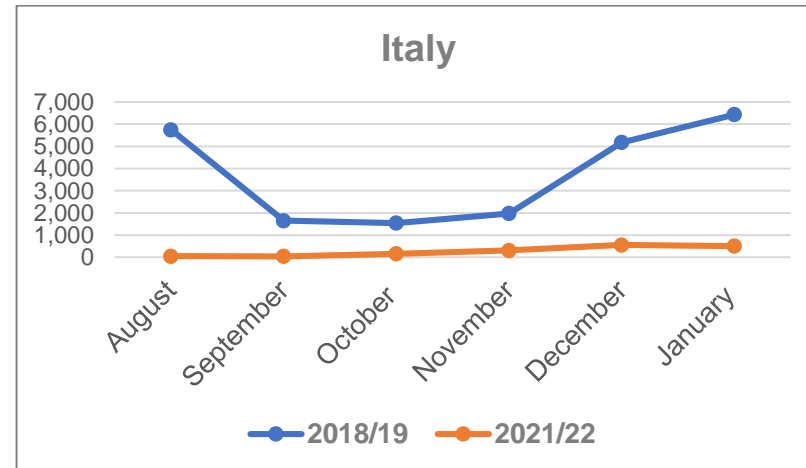
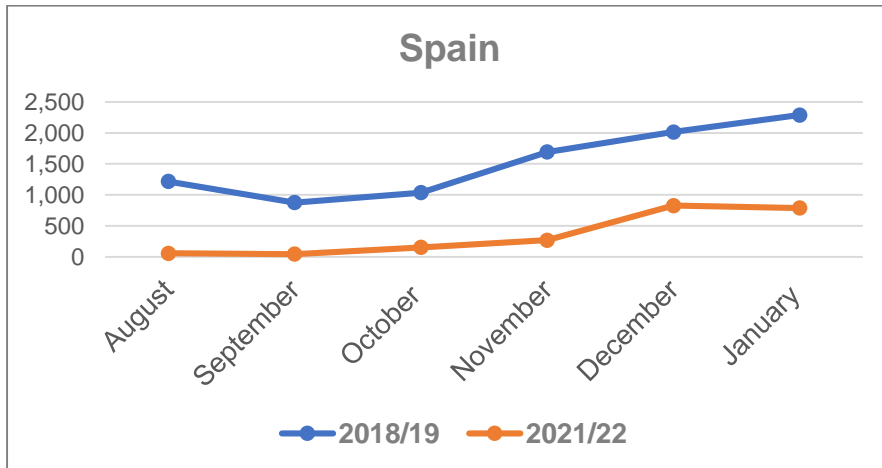
## Western Europe





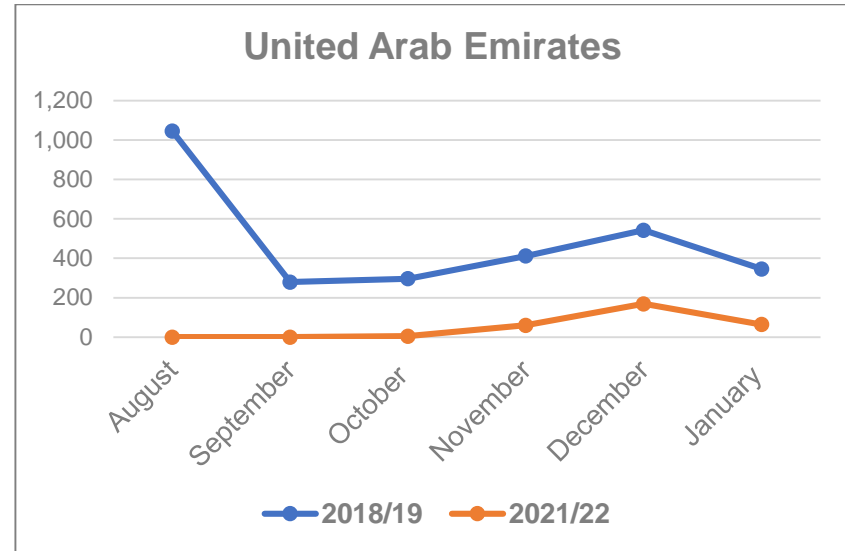
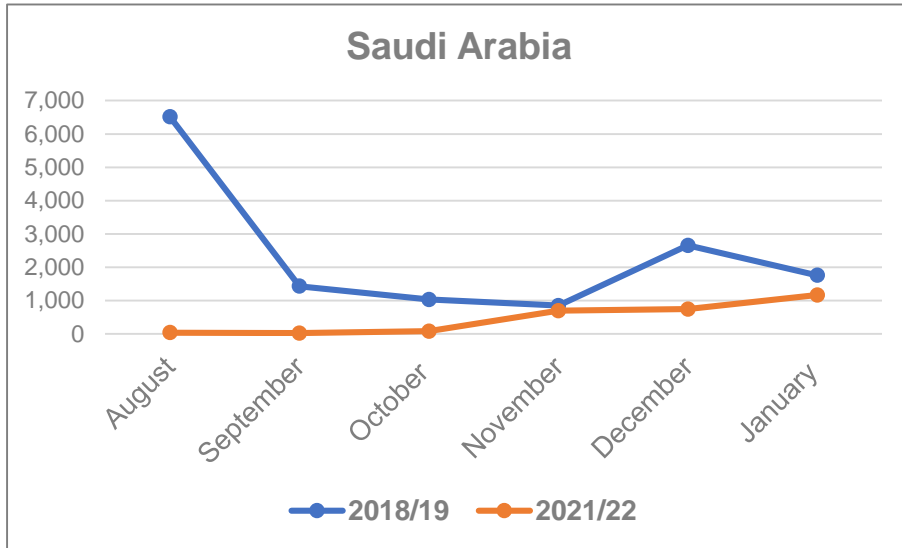
## Europe

### Southern Mediterranean Europe





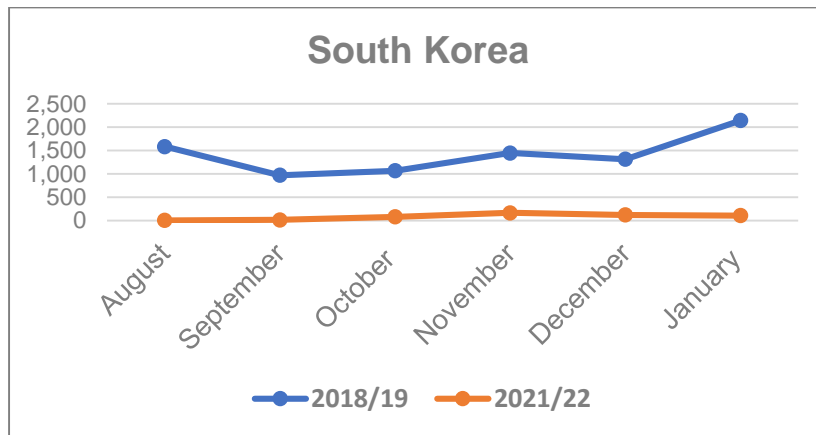
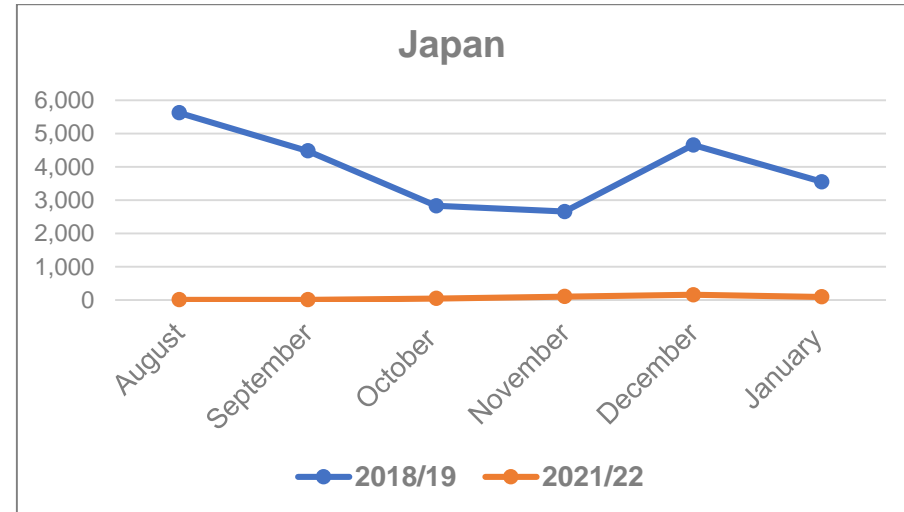
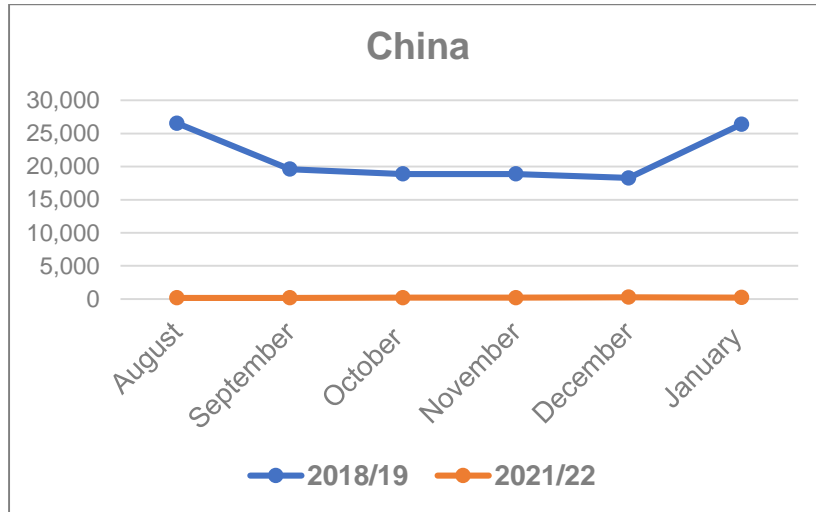
### Middle East





## Asia

### North East Asia



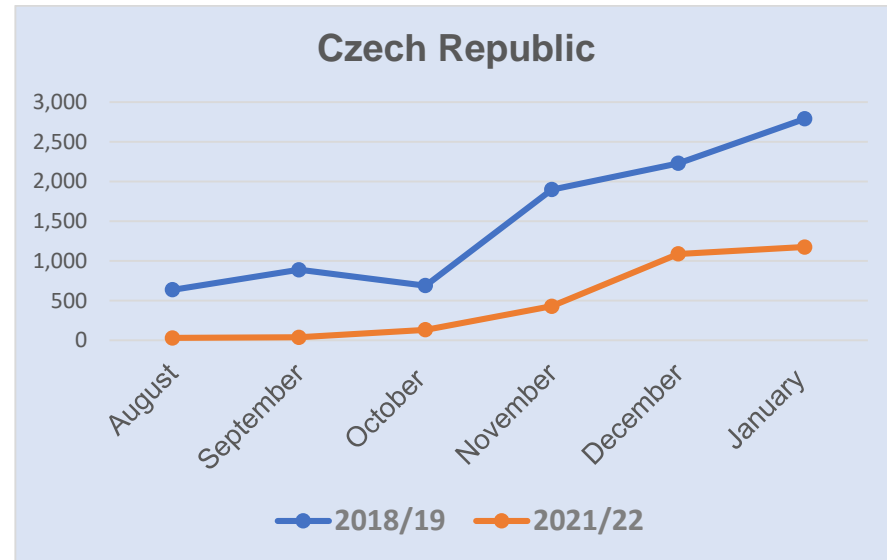
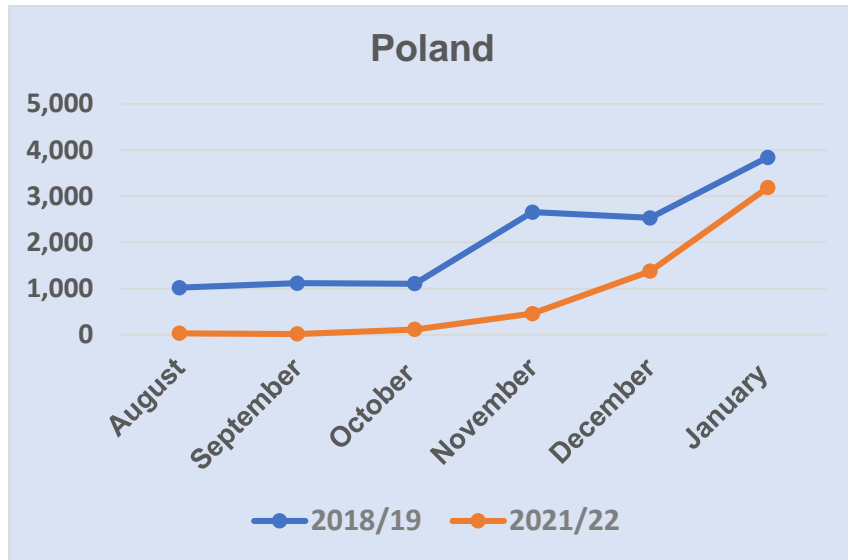
Note: The top primary markets for Sri Lanka have been identified using a combination of historical visitor arrivals data, total outbound market size data, overall size of the economy, recent consumer sentiment data and other variables. The intention is to track these source markets on a go-forward basis to understand future performance for Sri Lanka's tourism economy, including during the projected international tourism recovery period, 2022-2025.



## Tourist Arrivals to Sri Lanka from Top Potential Markets\*

### Europe

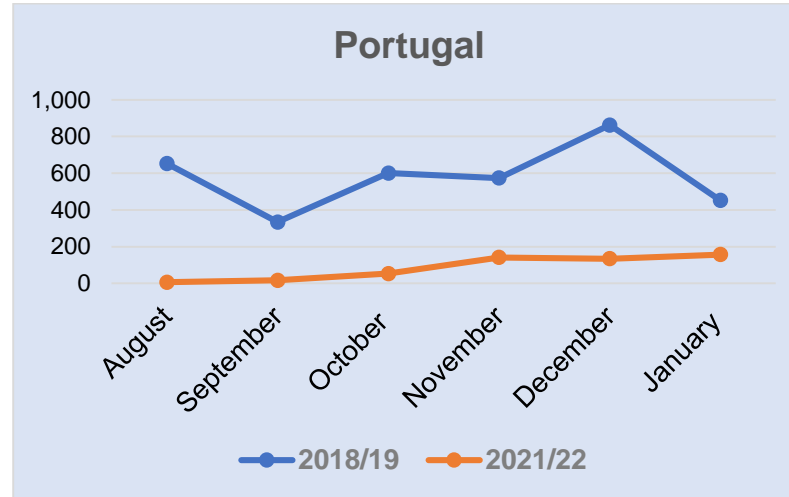
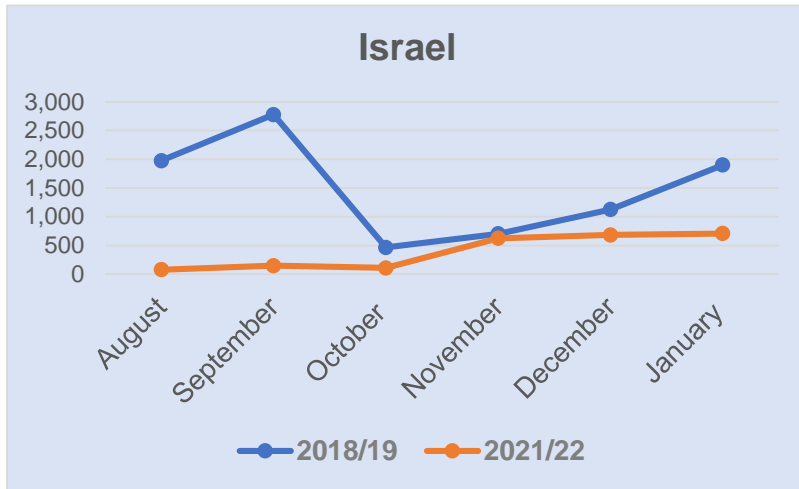
#### Central/ Eastern Europe





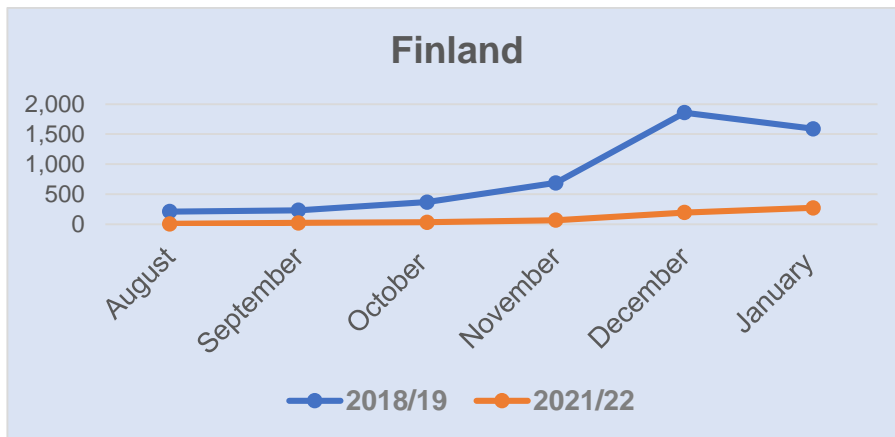
## Europe

### Southern/ Mediterranean Europe



## Europe

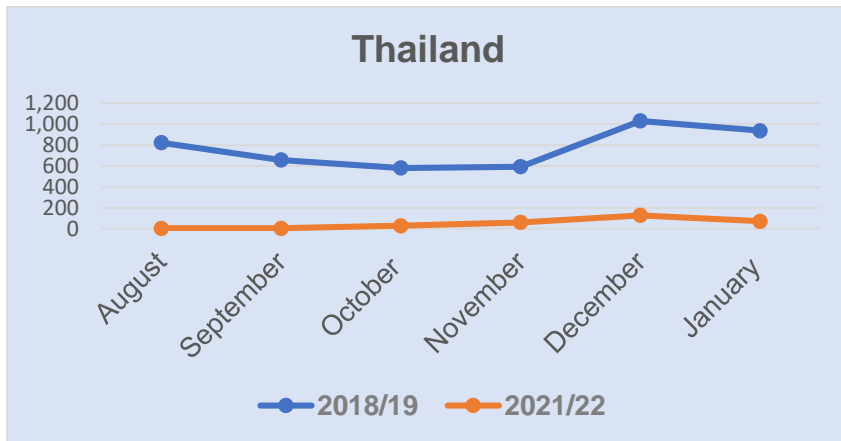
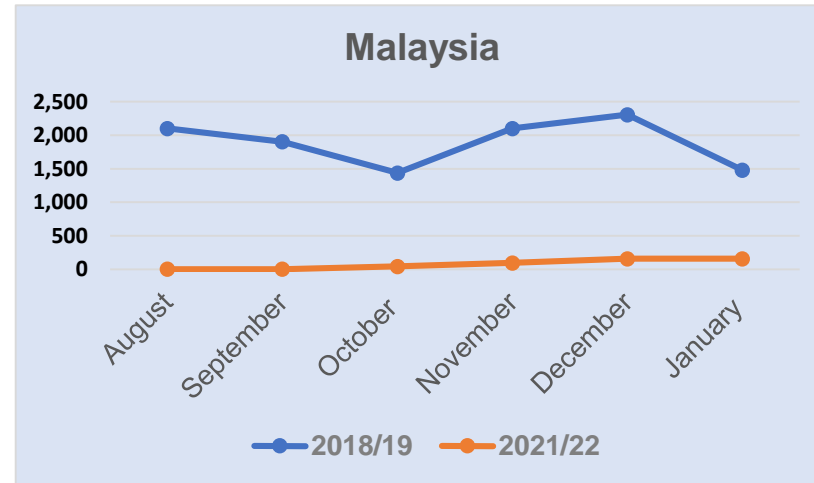
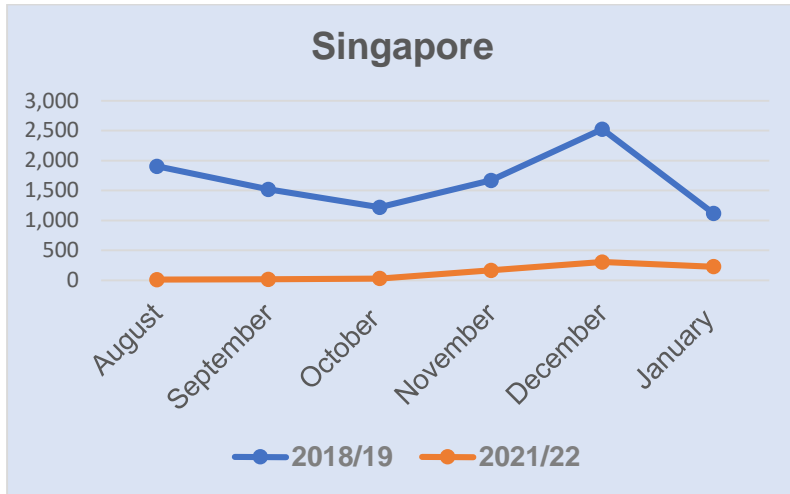
### Northern Europe





## Asia and Pacific

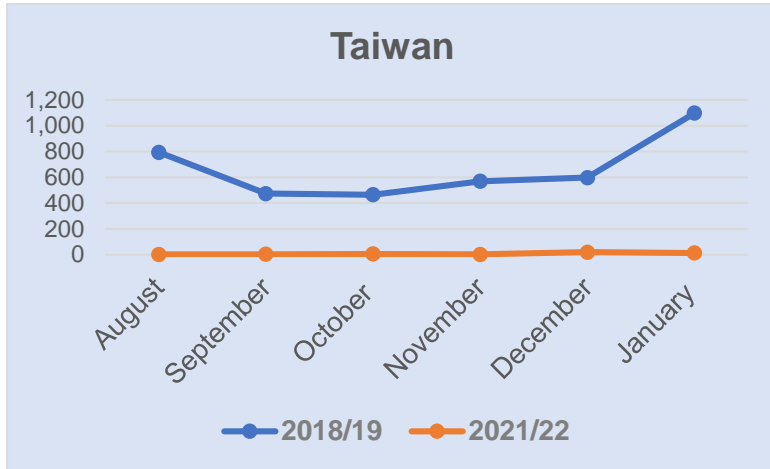
### South East Asia





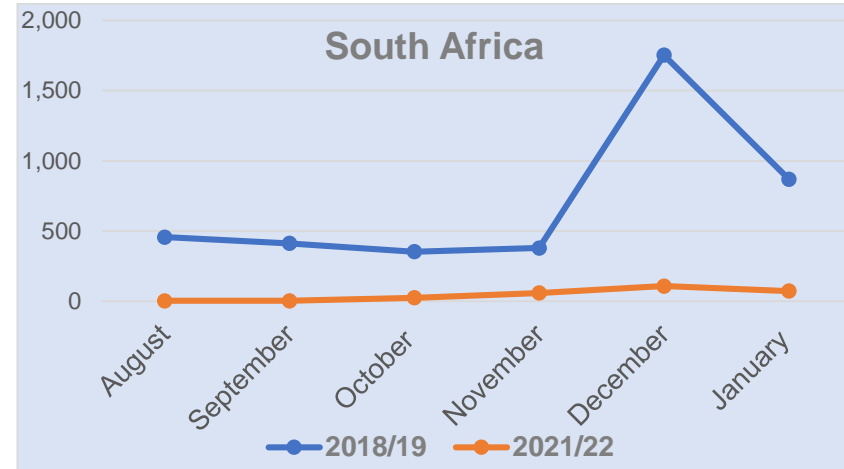
## Asia

### North East Asia



## Africa

### Sub Saharan Africa

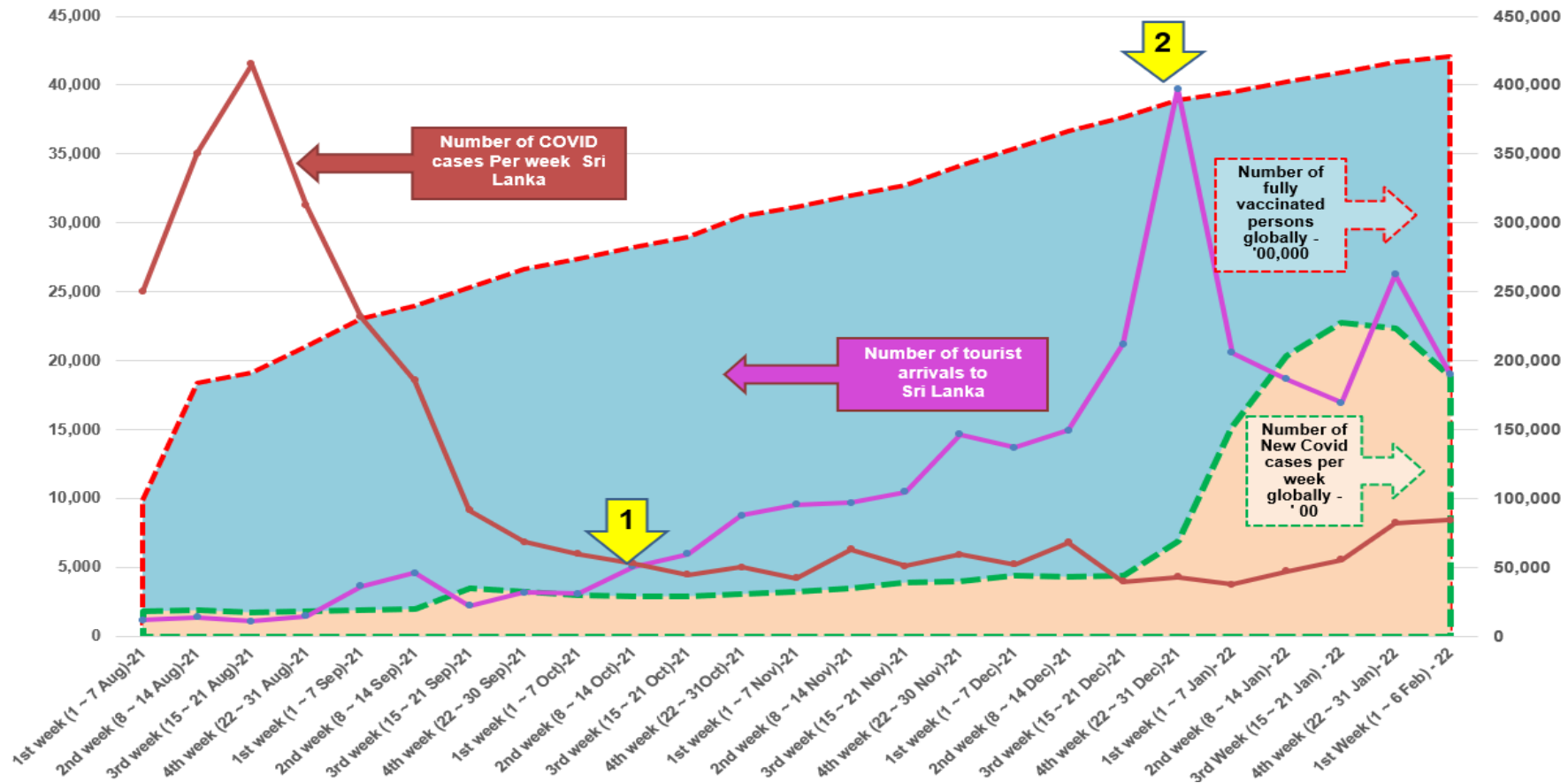


Note: The top potential markets for Sri Lanka have been identified using a combination of historical visitor arrivals data, total outbound market size data, overall size of the economy, recent consumer sentiment data and other variables. The intention is to track these source markets on a go-forward basis to understand future performance for Sri Lanka's tourism economy, including during the projected international tourism recovery period, 2022-2025.





## COVID-19 Cases, Vaccination & Tourist Arrivals to Sri Lanka (August 2021 to February 2022)



- 1** – Point of onset when the tourist arrivals started to grow with the declining cases of COVID-19 in Sri Lanka and the global cases remain under control
- 2** – Point of peak for tourist arrivals, with the declining cases of COVID-19 in Sri Lanka and the global COVID-19 cases just started to escalate



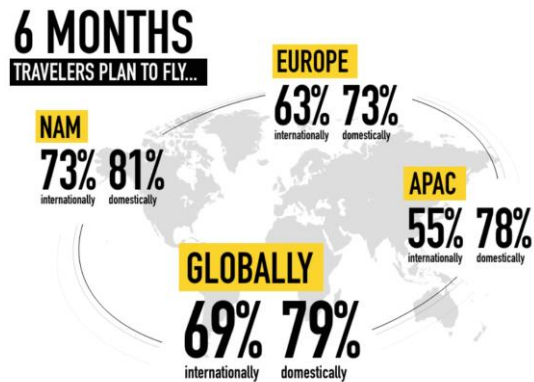
## Analysis

As per the findings of a research report by accommodation sector consultancy STR, government restrictions, quarantine concerns and apprehension regarding the behaviour and vaccination status of other travellers were key reasons inhibiting travel. Further, the findings suggest slightly more enthusiasm and excitement for travel in a post-pandemic world compared with their July 2021, findings and the industry seems poised for a significant uplift when travel decisions are unaffected by COVID-19. (Increasing COVID-19 cases dent consumer travel sentiment, 2021). In a similar study conducted by Phocuswright in 2020, on traveller sentiments, highest rank fear factors stated by USA, UK, German and French travellers were, becoming ill at destination, quarantine in destination/upon return, and becoming ill in transiting. Further, it has been revealed that in order to feel comfortable travelling again leisure travellers will look for the following factors.

- Drop-in infection rates that will create **lessened risk of getting infected**.
- Official Government advisories, change in quarantine policies and change in border control as reflected in **lowered restrictions**
- Whether the hotels, restaurants, bars have reopened and activities and attractions have reopened thus the **ability to experience the destination fully**

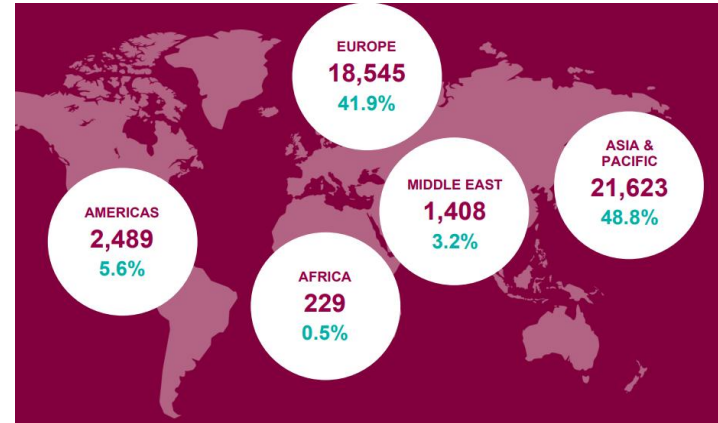


Figure 1



The OAG Global Traveler Sentiment, 2020

Figure 2



Tourist Arrivals by region and percentage share, November 2020

As depicted in the above figure 1, the findings of the OAG global traveller sentiment revealed that 63% of Europeans plan to take an international trip while 55% and 73% of tourists from Asia and the Pacific and tourists from North America (USA, Canada and Mexico) are planning to take an international trip respectively. Therefore, it is clear there is a sizable segment of consumers ready to explore the world again and there are vivid indications to a looming recovery.

An analysis of tourist arrivals to Sri Lanka especially after October 2020, supports the findings of the above research studies. Even though a decline was recorded from most source markets of Sri Lanka, in the post COVID-19 era (20/21) similar patterns in arrivals as in the pre COVID-19 era were noted expect in the arrivals from Russia and Poland. The remarkable growth in tourists from Russia that almost reach the pre pandemic levels has been pointed out by Forwardkeys also.

As per their data, Thailand, as the top Asian destination for Russian travellers in 2019, accounted for 37% of the market shares of all destinations in Asia. Back then Sri Lanka represented merely 3%, ranking 9th in the top Asian destination list, in 2021 with Thailand's market share decreasing



to 11%, while Sri Lanka increased its share to 4%, jumping to the fourth position in the ranking. The tourism reopening time in Sri Lanka compared to other similar destinations, limited promotion initiatives with Russia and initiation of direct flights could be attributed as the main factors behind this growth.

October 2020, gave a kick start to tourist arrivals in Sri Lanka in which only around 5,000 COVID-19 cases per week were reported from Sri Lanka, while around 5,000,000 cases per week were recorded globally. The vaccination rate stood at 74% in Sri Lanka at this stage. A further examination of factors that uplift travel sentiment, the inductive factors for arrivals to Sri Lanka can be depicted as follows:

<b>Crucial factors in making travel decisions</b>	<b>The case of Sri Lanka</b>
Lessened risk of getting infected	<ul style="list-style-type: none"><li>➤ High vaccination rates - 74% by November 2020</li><li>➤ 5,000 cases per week (November)</li></ul>
Lowered restrictions	<ul style="list-style-type: none"><li>➤ Opening of airport in January 2021</li><li>➤ Lowered entry health protocols In October: No on-arrival PCR test For fully vaccinated tourists: Negative PCR report done within 72 hours of embarkation/negative RAT report done within 48 hours No need of day 1 PCR test or quarantine Unvaccinated tourists: Quarantine at Safe &amp; Secure Level 1 hotel until day 7 exit PCR test or RAT is available</li><li>➤ COVID insurance</li></ul>
Ability to experience the destination fully	Tourist attractions and activities were opened to tourists

Thus, it vividly indicates the correlation between travel decisions and COVID-19 related factors, globally and in the destination country. Hassle free travel especially in the travel destination and in the outbound destination further motivates travellers. As depicted in the above graphs the arrivals from countries such as China and Japan continue to be at lower levels as they practice strict regulations and protocols on outbound and inbound travel. Thus, it is anticipated that the travel in the next few months will be influenced by government restrictions, health concerns and the wanderlust of travellers who are keen to explore the world again.



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