

Post-COVID19 Challenges and Way Forward for Sri Lanka Tourism

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Abstract

The present study attempts to evaluate the impact of COVID19 on Sri Lanka tourism industry and to make recommendations on the tourism recovery process. The study considers three vital sectors to evaluate the impact on Sri Lanka tourism: impact on the source markets, impact on the local tourism resources, and impact of travel bans, suspension of flights and curfew regulations. The study also envisages on the potential tourist generating countries to Sri Lanka, future travel behavior of the potential tourists, future tourism products demanded, and future operational challenges for the tourism and hospitality establishments. The study finally forwards short-term strategies to protect and promote Sri Lankan tourism industry with multi-stakeholder participation.

Keywords: *post-COVID19 travel; impact of COVID19 on Sri Lanka Tourism; travel bans and restrictions; strategies to promote Sri Lanka tourism; tourism stakeholders; tourism and economy*

Introduction

Since the end of the war, Sri Lanka tourism continued to record a two digit growth rate both in international tourists' arrivals and tourism revenues (Weerathunga, Xiaofang, Samarathunga, & Jayathilake, 2020). This speed growth was disrupted last year following the Easter Sunday Attack that made the industry suffer a loss of US \$1.5 billion of tourism revenue (de Silva, 2019). However, due to the untiring efforts of the Government, security forces, Sri Lanka Tourism Development Authority (SLTDA), and Sri Lanka Tourism Promotional Bureau (SLTPB) Sri Lanka tourism was quickly able to recover. As a result, Sri Lanka could attract 1.9 million of tourists by the end of 2019 despite of the unfortunate security breach (SLTDA, 2020). The present COVID19 outbreak again reminded us how vulnerable the tourism and hospitality industry to the external shocks. As of now, thousands of tourism service establishment that range from blue chip companies to souvenir sellers on the beach have entered in to an unprecedented period of zero revenue period leaving the stakeholders of the industry at a dilemma on the next steps to be taken. Thus, the purpose of this article is to elucidate the tourism stakeholders on post-COVID19 challenges and opportunities.

The Global Scenario

According to United Nation World Tourism Organization (UNWTO) international tourist arrivals will be dropped by 20% to 30% in 2020 when compared with 2019, which means a loss of 290 million to 440 million tourists in a single year (UNWTO, 2020). Accordingly, this could be read as a loss of US\$ 300 to 400 billion of international tourism receipt, or in the worst case scenario this could go as high as US \$1.5 Trillion, UNWTO warns. When reading the global tourist arrival and tourism receipt statistics, this loss will be equal to the industry growth of 5 to 7 years in a row. Table 1 explains the impact of notable global incidents in the recent past to the tourism industry.

Table 1: International tourist arrivals and receipts against recent major incidents

| Event | Change of International Tourist Arrivals | Percentage Change of International Tourist Arrival | Change of International Tourism Receipt (US\$) | Percentage Change of International Tourism Receipt |
|-----------------------------|------------------------------------------|----------------------------------------------------|------------------------------------------------|----------------------------------------------------|
| 2001 Sep. 11 attack (9.11) | +1 million | +0.1 % | -11 billion | -2.0 % |
| 2003 SARS | -3 million | -0.4 % | +50 billion | -1.4 % |
| 2009 Global economic crisis | -37 million | -4.0 % | -88 billion | -5.4% |
| 2020 COVID-19 (estimate) | -290 to -440 million | -20 % to -30 % | -300 to -400 billion | -20 % to -30 % |

Source: UNWTO, 2020

Having understood the gravity of the COVID19 pandemic crisis, many countries have already injected billions of much needed money in to their economies to protect the industries and the fiscal market. Amongst all those government mediation, release of US\$ 500 billion in to the fiscal market, that could be extended up to US \$4 trillion, by United States is palpable (Smialek, 2020). However, developing countries like Sri Lanka are not in a position to follow world powers, instead trying to implement local models to control the impact of the pandemic by every means.

The Local Scenario

Sri Lanka tourism industry is the third biggest Foreign Exchange (FE) earner with a total earning of US \$4.4 billion in 2018 and US \$3.7 billion in 2019 (SLTDA, 2019, 2020) that has got the worst hit among other top FE earners: Foreign Remittance, Textile and Apparel, and tea. The apparel and tea sectors will also continue to record a declined FE earnings due to the impact of COVID19 on source markets. Although President *Gotabhaya Rajapakse* promised to formulate strategies to attract 06 million tourists by 2025 and make US \$ 10 billion income (Rajapaksa, 2019), it is highly unlikely that those goals turn to be realistic figures. Additionally, the target of achieving 3.5 – 4 million tourists and earning US \$ 5 billion in 2020 is highly

unlikely considering the present spread and growth of the pandemic. Although Asian Development Bank estimated at the beginning of March the decline in tourism revenues for Sri Lanka could range from US \$107 million to US \$319 million (PWC, 2020), the real loss of income could be much higher than the forecast since the situation has escalated over the period of time.

According to SLTDA statistics in 2018, 169,003 and 219,484 people were employed as direct and indirect employees respectively by the tourism industry (SLTDA, 2019). As of now, a vast majority of these workers are temporarily unemployed due to the closure of hotels and restaurants, airlines, travel agencies, tourist shops etc. This has made a significance impact on the families who were totally depending on tourism. On the other hand, tourism investors are facing a financial crisis without being able to maintain a sufficient cash flow to pay back the debts, to pay the salaries and for other essential maintenance works at the properties. At this back drop issuing a debt moratoriums for identified vital sectors including tourism can be identified as an attempt to protect the industry.

COVID19 Challenges to Sri Lanka Tourism

Impact on the Source Markets

Amongst many factors, tourists' arrival to a destination is largely depending on three factors: destination area variables, generating area variables, and transit area variables. The COVID19 has made a huge impact on all these three factors that has brought down the international tourists' arrivals to a minimum level like never before. For instance, when we look at the present pandemic situation at our 'Top 10' source markets, most of them have been seriously hit by the COVID19 in terms of spread of the virus and the mortality rate. Although China has been very much successful in pandemic control, it is unlikely that China allowing their citizens to engage with any sort of leisure trips outside their borders in near future. Although Maldives has recorded a minimum number of infected cases among the top ten source market to Sri Lanka, their economic value is relatively lower since many Maldivians are visiting Sri Lanka for education, business and health purposes with tourist visa. It is further important to note that currently there are no bookings for the 2020 winter season and the tour operators are cancelling the bookings made in advance, the hotels and travel agencies complain (Daily FT, 2020). Therefore, it is very much palpable that Sri Lanka tourism source markets are at a stake and will not be sending tourists to Sri Lanka during the course of the year.

Table 2: Top 10 source markets to Sri Lanka tourism and the impact of COVID19

| # | Source Market | Arrivals in 2019 | Impact of COVID19 (16 th April 2020) | | | |
|---|----------------|------------------|-------------------------------------------------|--------|-----------|----------------|
| | | | No. of cases | Deaths | Recovered | Mortality Rate |
| 1 | India | 355,002 | 12,759 | 423 | 1,514 | 3.3% |
| 2 | United Kingdom | 198,776 | 103,093 | 13,729 | N/A | 13.3% |

| | | | | | | |
|----|---------------|---------|---------|--------|--------|-------|
| 3 | PR China | 167,863 | 82,341 | 3,342 | 77,892 | 4.0% |
| 4 | Germany | 134,899 | 135,383 | 3,850 | 77,000 | 2.8% |
| 5 | Australia | 92,674 | 6,468 | 63 | 3,747 | 0.9% |
| 6 | France | 87,623 | 147,863 | 17,167 | 30,955 | 11.6% |
| 7 | Russia | 86,529 | 27,938 | 232 | 2,304 | 0.8% |
| 8 | United States | 68,832 | 644,823 | 28,580 | 48,710 | 4.4% |
| 9 | Maldives | 60,278 | 23 | N/A | 16 | - |
| 10 | Canada | 48,729 | 28,379 | 1,010 | 8,979 | 3.5% |

Source: SLTDA (2020) & Worldometer (2020)

Impact on the tourism resources

Although the countries could control the COVID19 threat, we are not sure how fast the airlines, cruise lines, hotels and restaurants, destinations and other tourism related service establishments can prepare themselves to run their operations due to the post-COVID19 challenges. Cruises are particularly vulnerable to epidemics that put the cruise passengers at a great risk (Samarathunga, 2016). Further, loss resources including the human resource and capital resource will impose huge challenges for the tourism stakeholders in the months to come due to zero income and zero revenue conditions. We will have to witness certain number of qualified tourism and hospitality employees leaving the industry and joining with more stable industries in the short-run. Further, there is also a challenge of retaining the existing investors and attracting new investors to the tourism industry due to these unexpected incidents like Easter Attack in 2019 and spread of COVID19 in 2020. Many tourism establishments including airlines, hotels, travel agencies tourist shops etc. have already started laying off temporary and casual staff, stopped the salary increments, and even cutting the salary at different percentages according to the salary step of their employees. Further, the hoteliers and destination management companies have warned that they will have to lay off a considerable number of staff if the situation continues. This is a serious situation to consider since there are 388,487 direct and indirect tourism and hospitality employees in the industry according to SLTDA statistics. Out of that, direct tourism stakeholders like tour guides, that include National Tour Guides, Chauffeur Tour Guides, Area Guides, Site Guides and Informal (unlicensed) Guides are totally unemployed, who make a total of 5,424 (SLTDA, 2019). The tourism investors who invested on lands, hotels, restaurants, and vehicles are struggling without being able to pay back the loans. However, at this context, issuing of a debt moratorium on capital and interest payments on debt somewhat ease the pain, but it is unsure how long the government and the financial market could afford moratoriums.

Travel bans, suspension of flights and curfew regulations

Travel bans, suspension of flights and curfew regulations are very much needed to control the spread of the virus (Chinazzi et al., 2020). Outbound travel bans were first imposed in Wuhan of China after identifying the spread of virus through airline passengers. USA, Europe and many other countries also took different defensive actions to fight against the COVID19

at a late stage. The decision of UNWHO regarding international travel bans came after the spread of the virus and airlines, airline passengers, cruise lines and cruise line passengers were identified as COVID19 carriers. As of now, a vast majority of the countries in the world have imposed both domestic and international travels bans, grounded their flights, anchored their ships and do not welcome foreign tourists for the first time in the history of tourism (Chinazzi et al., 2020). Most of the countries who continue to receive international airline passengers have introduced new regulations to all the passengers to produce a health report that affirms the passenger is not infected with the virus. Further, countries including China has introduced compulsory nucleic acid tests and 14 days quarantine period to all international passengers (Goh, 2020). The curfew regulations and other disease prevention rules continue to keep even the domestic travelers at home giving much needed time to flashback through their memory lanes of past trips.

As of 15th April 2020, there are 12,512 foreign guests in Sri Lanka according to the SLTDA reports (COVID19 Emergency Response Center for Sri Lanka Tourism, 2020). Out of them there are 2629 Indian, 2076 Chinese, 906 British, 818 Russian, 801 Canadian, 570 Maldivian, 298 Ukrainian, 248 Italian, and other citizens in Sri Lanka. Further, 50% of these tourists reported to be staying at homestay units or unregistered properties in the down south beach front areas. About 30% prefer staying in Sri Lanka until the situation improves and a majority is waiting till airlines resume their operations. It is also our responsibility to look after these guests when they need it most. On the other hand this is a disguised blessing to Sri Lanka to spread the word of Sri Lankan hospitality to the entire world if we can attend to the needs of these guests, make them feel safe and comfortable while adhering to the health guidelines issued by the authorities.

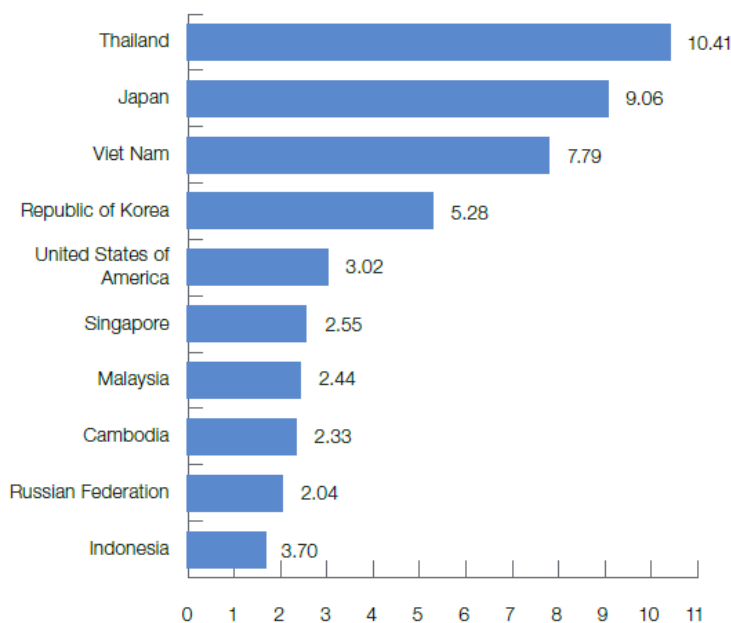
Future of the Tourism and Hospitality Industry

Will China be our hope?

The next million dollar question would be the future of tourism and hospitality industry. According to the information available as of now, China has been very much successful in controlling the spread of the virus. For good long years, Chinese tourists have been continuously visiting Sri Lanka who also spend handsomely at the hotels, tourist shops and for other tourism services. China has been the largest source market in the world since 2012. In 2018, there were around 150 million outbound trips from China and Chinese tourists spent over US \$277 billion in their travels abroad (UNWTO, 2019). On the other hand, in 2018 Sri Lanka received only 265,965 (167,863 in 2019) number of Chinese tourists (0.1% of the total outbound traffic). According to Travel China Guide Vietnam, Thailand, Japan, Indonesia, Singapore, Malaysia, Hong Kong, Philippines, Cambodia and Macau have been the top China outbound destinations (PATA, 2020). In comparative terms, the effectiveness of Sri Lankan pandemic controlling mechanism is better than most of above countries. On the contrary, some European and American leaders have made controversial statements regarding the

COVID19 to the disappointment of China. Additionally, the West has developed stereotype mentalities towards Chinese people which will affect negatively on Chinese travels in the West. This will open up new avenues for Sri Lanka to attract more high spending Chinese tourists in the year to come provided we do our homework well. It is also important to highlight the favorable economic and political ties that both countries are sharing together, which will ease any future bottleneck. The latest study report by Pacific Asia Travel Association (PATA) along with CCT and IVY Alliance highlights the post-COVID19 travel behavior of Chinese tourists. According to the reports Japan (18%) and Thailand (14%) will remain as the most preferred travel destinations among the Chinese tourist, followed by European countries (14%), and Maldives, Singapore, New Zealand, Australia, South Korea, Sri Lanka and Malaysia (PATA, 2020). Similarly, paying attention to the Russian market is imperative since the spread of COVID19 in Russia is relatively slow and low compared to the West. India also have done great so far and if they continue to be successful, they will also dominate Sri Lanka tourism as they did during the last decade.

Figure 1: Chinese outbound travels to top 10 destinations in 2018



Source: UNWTO (2019)

Continuous promotions in other conventional tourism markets that include UK, Germany, Australia, France, United States and Canada should not be forgotten because in near future the world will discover long waited curative and preventive vaccines to combat with COVID19. Small elite clusters from those countries will continue to make international travels immediately after lifting the travel bans and Sri Lanka will get their limelight as a “Safe” destination to travel. Therefore, it is our responsibility to handle the existing and emerging markets in efficient ways to get the maximum benefits under the new circumstances.

Asians in Asia, Europeans in Europe, and Americans in America

We are stepping in to a short era where global travel and tourism to take place with new and different conditions. As a result, the potential travelers will lose the opportunity of selecting their dream destinations and the hosts won't be allowed to welcome the free walk-in guests from any part of the world. In the process of getting over the existing hurdles domestic tourism will play a leading role. Then, the international travel will take place regionally during the first phase of the recovery period. Thus, the potential travelers will select neighboring countries to visit instead of flying out of the region. As a result, we can focus on safe and healthy potential tourist generating countries in Asia. Further, we should not sit back and wait for their arrival, instead we should plan to supply the correct tourism products and services followed by aggressive marketing campaigns to attract the post-COVID19 travelers. Table 3 produces a brief analysis on potential source markets in Asia we can look at with the relative number of tourists we received in 2018.

Table 3: Potential markets to Sri Lanka in the Asian region

| Country | No. of COVID cases (2020.04.16) | No. of Deaths | Outbound Travel in 2018 (millions) | Arrivals to Sri Lanka (2018) | Arrivals to Sri Lanka as a percentage |
|-----------|---------------------------------|---------------|------------------------------------|------------------------------|---------------------------------------|
| China | 82,341 | 3,342 | 150 | 265,965 | 0.17% |
| India | 13,430 | 448 | 26 | 424,887 | 1.6% |
| Japan | 9,231 | 190 | 18 | 49,038 | 0.27% |
| Taiwan | 395 | 6 | 16.6 | 8,187 | 0.04% |
| S.Korea | 10,635 | 230 | 28.7 | 15,748 | 0.05% |
| Malaysia | 5,182 | 84 | 13* | 22,808 | 0.17% |
| Singapore | 4,427 | 10 | 8 | 19,861 | 0.24% |
| Thailand | 2,672 | 46 | 10 | 9,178 | 0.09% |
| Hong Kong | 1,018 | 4 | 7.4 | 25 | 0.0003% |

Source: (SLTDA, 2020; UNWTO, 2020)

*estimated

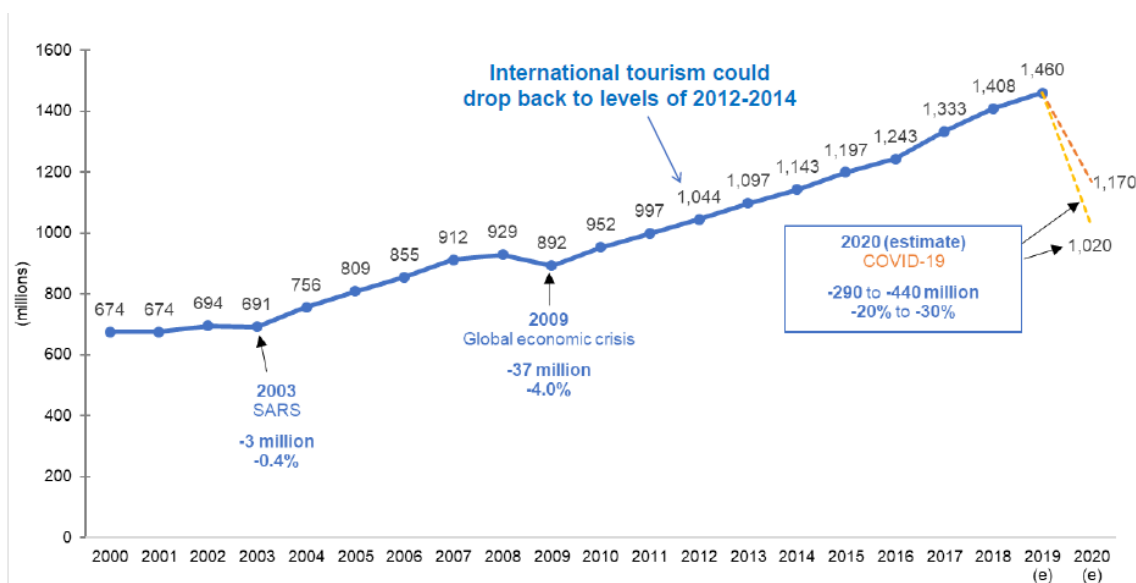
Future Tourism Products & Tourists Behavior

It is envisaged that the future tourism will take some time to bounce back. According to the UNWTO predictions, international tourism could drop back to the level of 2012 – 2014 period. Simultaneously, we can anticipate drastic changes in the thinking pattern of international tourists centered on their safety and well-being. Therefore we can expect following changes in the behavior of international tourists:

- 'Health and Wellness' will become a main purpose of travel among the Western Tourists;
- Increase of domestic tourism;

- Travelling to local destinations with families in their private vehicles, which will be followed by short-haul destinations (flying hours less than 5) and long-haul destinations will be selected thereafter;
- The tourists will travel in smaller groups (FITs) than being stick to lager groups (GITs);
- Tourists will move away from crowded places;
- Increase of individual consumerism instead of common consumerism that will make; more demands for private tours, yachts, private jets, small villas and bungalows;
- Increased demand for counselling and recuperating programs with the Eastern way of thinking that embedded with Buddhism, Hinduism, Ayurveda, Meditation and Yoga;
- Increased demand for alternative tourism including eco-tourism, responsible tourism, community based tourism, Ayurveda and Yoga, bird watching, agro tourism etc. instead of conventional mass tourism;
- Less demand for big hotels and resorts with large number of rooms, more demands for smaller hotels;
- More demand to island destinations including Sri Lanka, Maldives, Seychelles, Australia, New Zealand, and Caribbean Islands etc;
- Less demand for Cruise tourism since 13 passenger ships affected with the CoViD19 (ex. Diamond Princess in Japan, Ruby Princess in New Zealand);
- More demand for Business Travels and VFR;
- Increased demand for travel insurance to meet with emergency medical expenses, evacuation charges and cancellations;
- Less demand for indoor banquets and increased outdoor banquets (still the organizers will try to keep the attendees low);
- Increased demand for direct flights than connecting flights.

Figure 2: Forecast – international tourist arrivals in the world (millions)



Source: UNWTO (2020)

(e): estimate

Future Operations in the Tourism and Hospitality

The tourism and hospitality industry will experience strong changes in the months to come. Due to the global and local pressure on improved health standards, all the tourism and hospitality service providers will have to adapt with enhanced disease preventive and controlled methods for the health and safety of both in-house guests and employees. All the hotels will make it mandatory for the guests to carry updated health reports during the check-in process. Further, tourists will pay more attention to the safety standards of the hotels prior to a reservation and online travel review websites will start allocating some space to rate hotel's safety standards. The key attention will be paid upon the health safety on crowded public areas including terminal, restaurants, lobby areas, swimming pools, rest rooms, lounges and bed rooms. The smart hotels will be compelled to introduce contactless room service with robot waiters challenging the conventional outset of the tourism and hospitality industry. Further, the service establishments will be highly motivated to strictly follow HACCP (Hazard Analysis and Critical Control Point) standards like never before. Finally, the authorities will have to introduce new guidelines on how to run the tourism and hospitality businesses while minimizing the health risks and maximizing the guests' satisfaction.

Short term strategies to consider

Post-graduate students of Masters in Tourism Economics and Hotel Management of Department of Economic, University of Colombo (2011 batch) forward following short term strategies that the stakeholders can consider at the revival of the industry with standard health protocols (only key suggestions are presented here):

1. Attracting rich European millionaires only for beach holidays. The tourists can be air lifted to the hotel directly and other than the hotel staff no contact with anyone;
2. Reduce the medical burden of the European countries by attracting older tourists to purposely built retirement homes in Sri Lanka for long stays (minimum 03 months);
3. Enjoy now pay later. Longer credit facilities to be given to stable tour operators;
4. Reduce imported food on the menu. Serve *A La Carte* to minimize the leakages & to stabilize the Sri Lankan rupee;
5. Inviting the Sri Lankan diaspora to pay a visit with their foreign friends;
6. Getting the support of Sri Lankan diaspora to promote Sri Lanka by word-of-mouth and social media;
7. Promote online check-in's and check-out's at the hotels to reduce contact points;
8. Introducing We-chat and Ali-pay payment methods to Chinese tourists to pay in RMB;
9. Preparing for the increased arrival of Chinese tourists with an increased number of Chinese speaking tour guides and other service personal;
10. European Medical staff to be sent to Sri Lanka for Rest, Recuperation and Recreation at a later stage;
11. Promotion of Ceylon Tea with its health benefits;

12. Promotion of Ayurveda and Indigenous medicine to boost the immunity;
13. Sri Lanka to have more direct flights from focused tourist generating countries;
14. Promote distress and counselling programs with the Eastern way of thinking embedded with the Buddhist philosophy, Hinduism, and Ayurveda;
15. Small boutique hotels can be leased out to millionaires on long term basis;
16. International tour operators to encourage their credit card companies to offer interest free instalment payments for customers on travel plans;
17. Looking at small corporate meetings & incentives and paying attention to host online conferences using the webinar concept;
18. Preparing the local communities to welcome and host tourists;
19. Invest on alternative tourism product development and promotions;
20. Using the tourist coaches for long distance public transportation at a higher price with safety regulations;
21. Introduce virtual tourism with creative videos, sound tracks from iconic destinations embedded with augmented reality;
22. Plan to welcome more young risk taking back-packers, who will travel to off-beaten destinations and live with the communities;
23. Tourism authorities to prepare a Tourism Resilience Plan (TRP) to better manage situations like this in the future;

Role of the Government in Securing the Tourism and Hospitality Industry

As discussed before, we are stepping in to an unprecedented period of time bare hand. Thus, the industry stakeholders are expecting the government to play the leading role to protect the industry. Although Sri Lanka government has already taken timely actions for the interest of the stakeholders, it is hard to expect continues support of the Government considering the financial position of the country. However, we recommend the government to discuss with relevant industry experts, Universities, professional bodies like Sri Lanka Association of Inbound Tour Operators (SLAITO) and The Hotel Association of Sri Lanka (THASL) to develop a mechanism to protect the third biggest foreign exchange earner of the country. While appreciating the actions like extending the debt moratorium, waiving off annual guide renewal fee, paying Rs.5000.00 to the informal sector participants we suggest the government to attend to the payroll crisis of the hotels, destination management companies (DMC's) and other tourism service providers, and granting loans to the needed stakeholders on concessionary terms. Tourism Development Levy (TDL) can be utilized in this regards. Additionally, the government must look at the new and safe generating markets, product developments and launching appropriate marketing campaigns to attract the tourists as suggested by the preceding section. Short-term training and development programs after considering the future tourism trends, enhancing and regulating the health standards of tourism establishments, short-term skill transmissions to other productive and high impact sectors are also viable options ahead of the Government. Finally, it is mandatory to form a

committee representing all the tourism related sectors to construct a Tourism Resilient Plan (TRP) that has been long missed in Sri Lanka tourism. By taking these actions, the Government will be able to retain the existing employees and investors, support the livelihood of the industry stakeholders and to protect the industry by building much needed confidence on this vibrant industry.

As a final note it should be mentioned that although tourism and hospitality industry has faced different outside cyclones in its recent history, it has always bounced back faster, harder and stronger. The industry will continue to generate foreign exchange, offer employment opportunities, develop the rural areas, increase cross cultural understanding and will deliver many more opportunities. Thus, it is important to hold our grounds as a must visit and a safe destinations in the world even during these turbulence times.

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