

CHARTING A COURSE FOR SRI LANKA'S TOURISM FUTURE

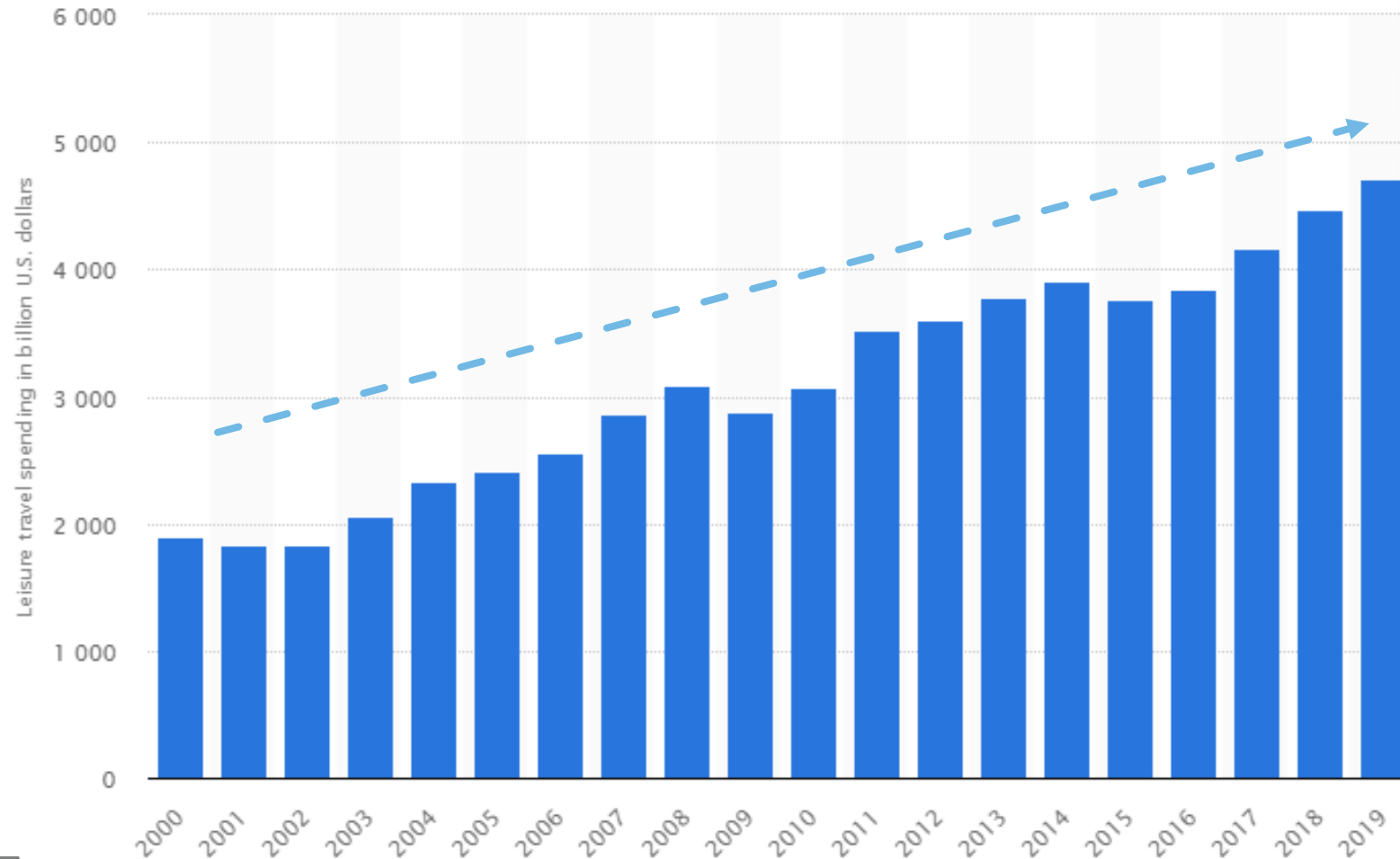
NAVIGATING MACRO FORCES IMPACTING TOURISM
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LEISURE TOURISM SPENDING WORLDWIDE 2000-2019

(in billion US dollars)

With the exception of three years, global tourism has seen tremendous (but unbalanced growth) over the last two decades



DECLINE IN INTERNATIONAL TOURIST ARRIVALS 2019-2020

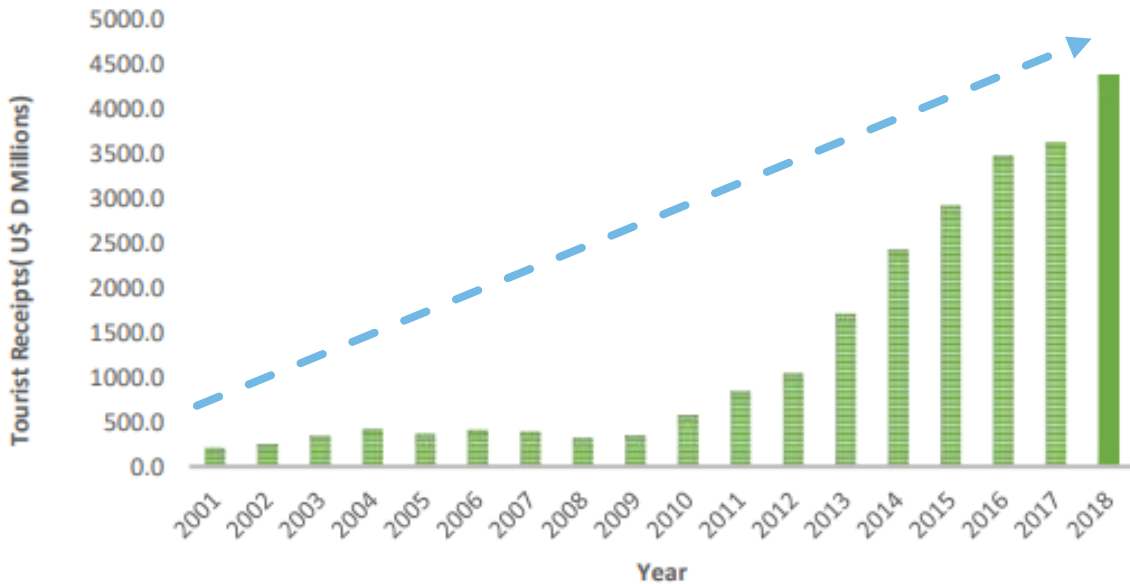
(in millions)

Global inbound arrivals are expected to **decline 60%** in 2020, with a loss of 700mn visitors compared to 2019

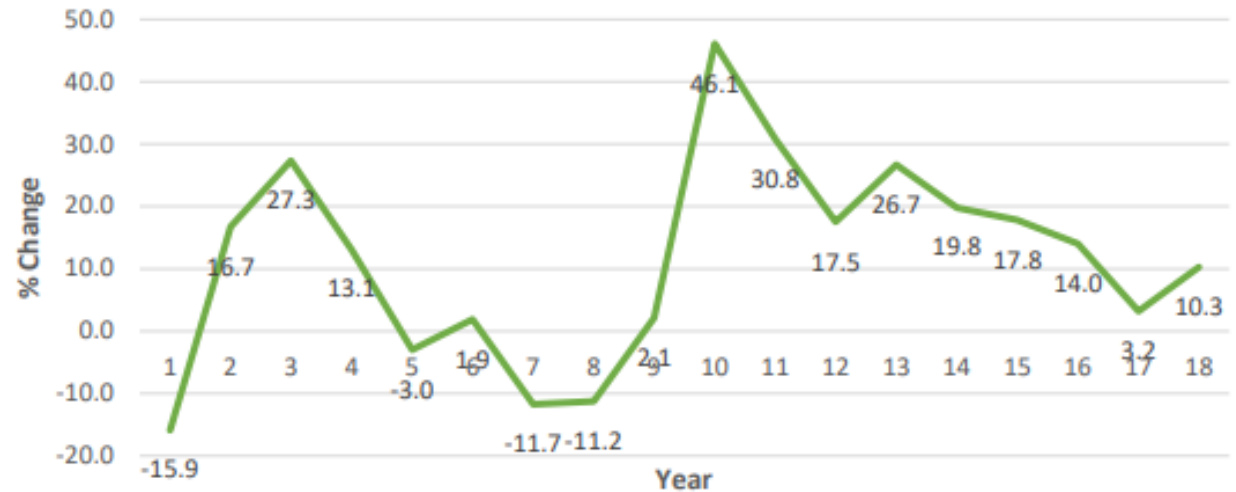


WHILE ABSOLUTE TOURISM ARRIVALS TO SRI LANKA REACHED 2.33M IN 2018, WITH \$4.38B IN SPEND, GROWTH HAS BEEN INCONSISTENT AND HIGHLY DEPENDENT ON CHINA, INDIA AND A HANDFUL OF SOURCE MARKETS

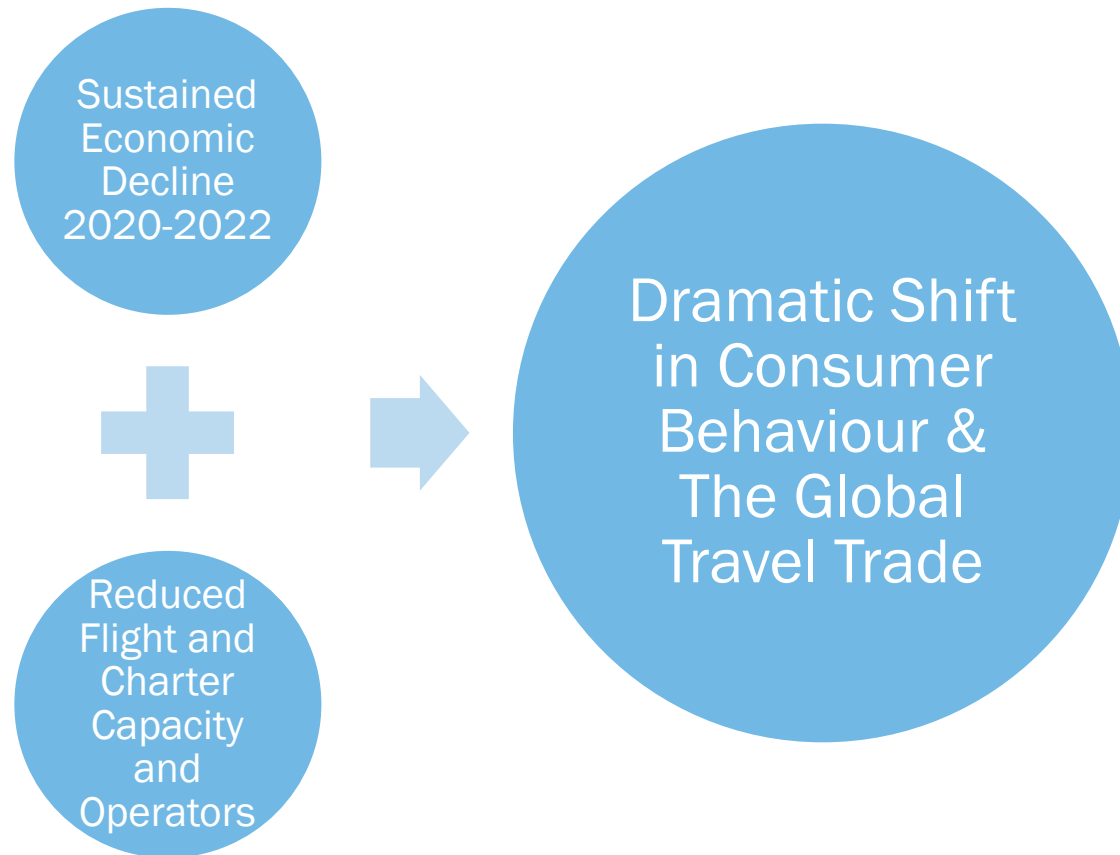
Tourism Receipts (\$USD), 2001 - 2018



Tourist Arrivals Growth Change - 2001 - 2018



RISK FACTORS & PRIORITY FOCUS AREAS FOR SRI LANKA – BUILDING RESILIENCY & DRIVING HIGH-VALUE TOURISM



Focus Areas for SLTDA

Identify Source Markets: Prioritize and Balance

Determine Consumer Segments: to drive yield, dispersal and seasonality

May Strategic Investments: Prioritize trade shows, marketing and communications channels and trade partners

Tourism.Defined

Twenty31.org

Twenty31 Consulting is an innovation-based management strategy and research consultancy working with senior leaders of travel and tourism organizations to define and build sustainable, competitive advantage.



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