

POLICY IMPLEMENTATION ON REBUILDING SRI LANKAN TOURISM INDUSTRY DURING POST COVID-19 PANDEMIC PERIOD FROM 2019 TO 2023

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Abstract

Tourism industry acts as an engine of growth in Sri Lanka which links so many other sectors in the economy. With the unprecedented crisis of COVID-19, tourism and its networked sectors were severely affected. Many researchers have studied the impact of the pandemic on different sectors including the tourism industry. Despite having all those, it was identified that there is a little amount of researches have been done on the strategies and governmental policies which have been implemented by the Government of Sri Lanka (GoSL), Central Bank of Sri Lanka (CBSL), Sri Lanka Tourist Development Authority (SLTDA) and the Board of Investment of Sri Lanka (BOI) to rebuild the Sri Lankan tourism industry. Hence, this study aims to study the policy implementation in Sri Lanka towards the tourism industry during the post-pandemic period using the secondary data from the sources of SLTDA, BOI and so on. Mainly, mixed research method was used into this study where quantitative data analyzed the performance of tourism industry through descriptive analysis and qualitative data analyzed the policies that were implemented during post-pandemic period. Findings of the study reveals that the tourist arrivals, tourist receipts, food and accommodation and both direct and indirect employment opportunities of tourism industry was severely hindered by the COVID-19 pandemic with rigorous decline of their performance until 2021. In 2022, they achieved rapid increase implementing policies such as granting debt moratorium, providing *Saubagya* COVID-19 Renaissance Facility and *Jaya Isura* loan scheme to provide working capital for enterprises in tourism industry, granting visa-free entry for visitors from seven countries, developing domestic tourism in parallel to the promotion of international tourism and so on. Yet, Sri Lankan tourism industry is needed to adapt advanced technology and effective marketing strategies in order to solve the issues that faced during the pandemic period.

Keywords: Policies, Post-Pandemic, Rebuild, Sri Lanka, Tourism

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Introduction

Tourism refers to the activities of persons travelling to and staying at places outside their usual permanent places of residence not exceeding twelve months for leisure, business and other purposes (Malagekumbura & Biyiri, 2022). Tourism acts as an engine of growth and development since decades ago leading up to 2019.

In 2019, global tourism has suffered its deepest crisis during COVID-19 period having the darkest outcomes of it from 2020 to 2022 on businesses, employment and livelihoods around the world. Travel restrictions such as border closure, quarantines, curfews and also the lack of coordination among countries in terms of health safety protocols and restrictions were the causes for the uncertainties and weak demand in the global economy. With the time period, the partial recovery in international tourism was fuelled in 2022 by strong pent-up demand and the easing the travel restrictions with the doubled arrivals in 2022 compared to 2021.

COVID-19 is one of the most unprecedented health, social and economic crisis in the world which disrupted to tourism starting from March 2020. Overall, there was a loss of 2.6 billion international arrivals in 2020, 2021 and 2022 altogether which was almost twice the arrivals recorded in 2019. Moreover, export revenues from international tourism have been declined 63 percent in 2020 and 60 percent in 2021 compared to 2019 in real terms with the rebounded effect in 2022 with 24 percent below pre-pandemic levels. However, COVID-19 pandemic has left its marks on the economy by hindering the economic activities of tourism sector making the loss of USD 2.5 trillion in tourism revenues, dropping the share of international tourism from 7 percent to 3 percent of global exports, falling tourism from 3rd to 9th place as global export category and increased average spending per trip during 2020-2022 period (Impact Assessment of the COVID-19 Outbreak on International Tourism | UN Tourism, n.d.).

Regionally, Asia and Pacific suffered severely from the impact of pandemic and implemented strongest travel restrictions with the 84 percent decline of international arrivals in 2020. When considering the tourists' earnings, it declined to 80 percent below 2019 as many destinations remained closed to non-essential travel. As Sri Lanka is one of the most well-known tourist destinations within Asia, the tourism industry is making valuable contribution to Sri Lankan economic and socio cultural development (Sivesan, 2020). It is one of the fastest growing industries and the largest foreign exchange earner within the country's economic profile. It was crippled by the catastrophe of COVID-19 in 2019 with the containment measures and its repercussions.

During the year of 2019, Sri Lankan economy also has a dismal performance due to the impact of COVID-19 and the Easter Sunday attacks when Sri Lanka was graduated to the upper middle income country as per the World Bank Classification of countries published in July 2019. Both these crises have made the turbulent environment in Sri Lanka worsening the sluggish growth of the economy having a severe impact on the tourism sector with its spillover effects across the economy especially in the tourism industry and its related activities including accommodation, transportation, wholesale and retail trade activities and other personal services.

According to the Board of Investment of Sri Lanka, it specifies some key targets to achieve in related to tourism industry namely tourists earnings approximately US \$ 8 billion, tourists arrivals approximately 4 million and talent pool sector-wise approximately 400,000+ by 2025. Despite the temporary setback posed by the pandemic, appropriate growth supportive strategies were implemented

to address longstanding structural issues and enhance domestic production, improve export orientation and attract foreign direct investments (FDI). Policymakers in every country are still struggling to grapple with the crisis of pandemic amidst numerous uncertainties. Back in 2019, Sri Lanka was following relatively successful early measures to stop the spreading of virus backing off some economic activities which had a notable impact on tourism industry in Sri Lanka.

Despite of suggestions and strategies were proposed by the researchers in related to the COVID-19 pandemic, the post-pandemic strategies, governmental policies and their effect on the post-pandemic recovery of tourism industry in Sri Lanka is not satisfactorily analyzed with the required data. Identifying that research gap, this study aims to study the policy implementation in Sri Lanka towards the tourism industry during COVID-19 pandemic.

Literature Review

Tourism industry is an umbrella industry networked with so many other sectors in the economy such as hotel, education, travel and transportation, retail and so on (Ranasinghe et al., n.d.). According to the study of (Sivesan, 2020), it has been revealed that the Sri Lankan tourism industry was performed well aftermath of the civil war with the increased tourists year by year until the Easter Sunday attacks in 2019. It was from 447,890 in 2009 to 1,913,702 in 2019. Though the tourists traffic to Sri Lanka decreased from 2010-2013 due to international war crime inquiry, global economic recession and climate events but it increased between 2014 and 2019. While being recovered from the Easter Sunday attack, the tourism industry in Sri Lanka experienced the brunt of the pandemic of not attracting tourists from China, India and Europe which was the tradition of the country.

Tourism industry in nature generates both direct and indirect employment opportunities for many people. Large numbers of employees have lost their work due to the closure of businesses in tourism industry such as restaurants, hotels, travel agents and tourist airline services leading small and medium enterprises entrepreneurs' livelihood damages (Sivesan, 2020). According to the Central Bank of Sri Lanka Report (2019), approximately 60 percent of informal sector employees and estimated 1.9 million daily wage earners were in the precarious position.

The whole tourism system was hindered in the spheres of international and domestic tourism, day visits and segments of cruises, public transport, accommodation, cafes and restaurants, conventions, festivals and sports events. Spreading the positive news through news channels and social media platforms to aware both domestic and international tourists were suggested to increase the performance of the sector (Ranasinghe et al., n.d.)

The special campaign named "Travel Tomorrow" has become the common thread of every country which was initiated by the World Tourism Organization as a response to the pandemic. Furthermore, it was revealed that the community based tourism should be properly encouraged and destinations should be rebranded (Ranasinghe et al., n.d.). (Suresh et al., 2020) explores that GoSL had announced fiscal measure to support the hotel industry travel agencies and tourists guide facilitating low interest loans over a 2 year period and leasing facilities to purchase tourism-related vehicles for safari rivers.

Alternative tourism including ayurvedic tourism and domestic tourism has been developed during the COVID-19 revival phase in order to maintain the satisfactory performance in the tourism industry (Malagekumbura & Biyiri, 2022). In the National Export Strategy for 2018-2022, a wellness segment has been identifies as an essential strategy emphasizing the ayurvedic tourism to earn income instead of mass tourism especially during the pandemic period. It was further identified that the health and

wellness has been become the main travel purpose among western tourists resulting higher demand for alternative tourism. There was a 0.1 percent growth in the category of tourists who visit for health purposes in 2019 compared to the previous year.

Methodology

Mixed research method was deployed into this study which utilizes both qualitative and quantitative data. Both data was collected through the secondary sources. Mainly, data was derived from annual reports of Sri Lanka Tourism Development Authority, Central Bank of Sri Lanka, and Board of Investment of Sri Lanka so on. Quantitative data was analyzed by using descriptive analysis.

Results

Post-Pandemic Performance of Sri Lankan Tourism Industry

Tourist Arrivals and Tourist Receipts

The COVID-19 pandemic caused severe disturbances to mobility and tourism-related activities with the overall contraction in services in 2020 by 1.5 percent in value added terms. It has affected on tourism-related services and activities as tourist arrivals dropped drastically since mid-March 2020 due to travel bans.

Table 1: Tourists Arrivals, 2013-2022

Year	Tourists Arrivals
2013	1,274,593
2014	1,527,153
2015	1,798,380
2016	2,050,832
2017	2,116,407
2018	2,333,796
2019	1,913,702
2020	507,704
2021	194,495
2022	719,978

Source: Sri Lanka Tourism Development Authority

The number of tourists arrivals in 2019 declined by 18 percent reflecting the setback in the tourism industry. It was further declined until 2021 according to Table 1 following a significant increase in international tourist arrivals to the country in 2022 recording a 270.2 percent increase compared to the 194,495 tourists in 2021. Most of international tourists arrived from the largest sources of tourists to Sri Lanka; Europe enjoying the strongest relative increase in 2022 having 42.5 percent and then from the Asia and Pacific recording nearly 20 percent. India has been the top international tourist market to Sri Lanka accounting for 17.1 percent of the total traffic in that year. The same trend was maintained in 2023 attracting more tourists from Europe and then from Asia and Pacific region. When concerning to last year, 767,913 tourist arrivals recorded from January to July 2023.

With the decreased tourist arrivals, the official tourist receipts were also declined from 2018 to 2021 as in the Fig.1. It was recovered in 2022 recording US \$ 1,136.31 million and US \$ 1,093.98 million until July 2023.

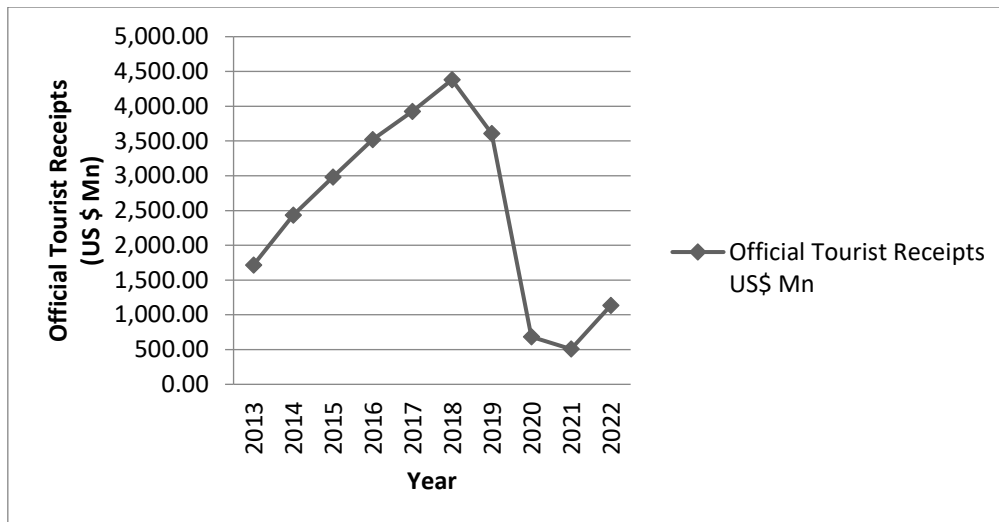


Figure 1: Official Tourist Receipts (US \$ Mn), 2013-2022
Source: Sri Lanka Tourism Development Authority

Accommodation

Consumption expenditure on restaurants and hotels slowed down in 2019 with the sluggish demand for accommodation and restaurant facilities. With the significant contraction in tourist arrivals, accommodation, food and beverage service activities contracted by 39.4 percent in 2020 in value added terms.

Table 2: Annual Room Occupancy Rate (Graded), 2013-2022

Year	Annual Room Occupancy Rate (Graded)
2013	71.7
2014	74.3
2015	74.5
2016	74.76
2017	73.27
2018	72.77
2019	57.09
2020	14.96
2021	18.6
2022	30.4

Source: Sri Lanka Tourism Development Authority

The room occupancy rate in graded hotel establishments approved by the SLTDA decreased substantially to 57.1 percent in 2019 compared to 72.8 percent in 2018. It has been further decreased significantly in 2020 compared to 2019. According to the Central Bank Report of 2021, gradual rebound in tourist arrivals made other tourism-related activities of accommodation, food and beverage service activities to recover from their lower performance by 1.9 percent in 2021. During the post-pandemic period, accommodation of the sector was developed from 2021 until now.

Employment

According to the estimates of the SLTDA, direct and indirect employment in the tourism sector is 4.6 percent of the total labour force in Sri Lanka. As a source of generating employment opportunities by the tourism industry, it paves the way to access both direct and indirect job opportunities such as public transport, accommodation, cafes and restaurants, conventions, festivals and sports events.

Table 3: Direct and Indirect Employment (Estimated), 2013-2022

Year	Employment	
	Direct	Indirect (Estimated)
2013	112,550	157,600
2014	129,790	170,100
2015	135,930	183,506
2016	146,115	189,544
2017	156,369	202,846
2018	169,003	219,484
2019	173,592	229,015
2020	175,990	171,761
2021	177,476	180,451
2022	190,521	195,715

Source: Sri Lanka Tourism Development Authority

Direct employment opportunities have been increased continuously during the post pandemic period while indirect employment decreased from 2019 to 2020 approximately by 10,000 and then increased in 2021 and 2022.

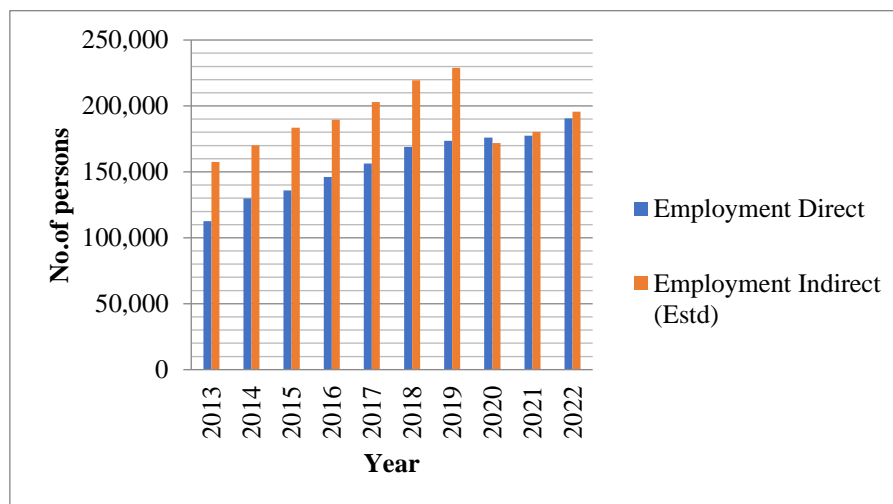


Figure 2: Direct and Indirect Employment (Estimated), 2013-2022

Source: Sri Lanka Tourism Development Authority

Fig.2 shows that there is a gradual increase in the direct employment opportunities but the indirect employment opportunities at initial years maintained a gradual increase during pre-pandemic period. Then onwards, it had under-performed from latter part of 2019 with loss of jobs in restaurants, hotels, and Micro, Small and Medium enterprises (MSME) and due to the closure of businesses and industries.

Post-Pandemic Policy Implementation

Even though the effect of pandemic hinged the Sri Lankan economy severely, measures to achieve normalcy in the domestic economic activities could enable Sri Lanka to record faster recovery especially in the tourism sector and its components such as foods and beverages, accommodation and transport facilities.

To address the effects of pandemic, Sri Lanka implemented three types of policies; border control and health sector policies, fiscal measures, and monetary and financial sector measures. Among these policies, Government of Sri Lanka (GoSL) and Central Bank of Sri Lanka (CBSL) adopted fiscal and monetary measures to provide relief to businesses and individuals affected by the pandemic. In order to ease the burden on businesses and individuals from the outbreak and containments measures, GoSL and CBSL undertook following key measures.

- A wide ranging debt moratorium has been granted for the tourism, plantation, IT and apparel sectors, related logistics providers and small and medium scale enterprises.
- Above businesses were received working capital loans and investment purpose loans at concessional rates. In order to support this, financial institutions have been requested to reschedule non-performing loans.
- Introduction of the ‘Saubagya COVID-19 Renaissance Facility’ which provided working capital for adversely affected businesses to rebuild their activities.
- Various concessions for businesses engaged in the tourism, apparel, and wholesale and retail trade sectors were introduced.

The annual report of CBSL (2019) emphasized that the image of Sri Lanka as a safe and tourism friendly destination can be improved with the strategies of;

- introducing smart technology and standardization using various social media platforms, impactful media campaigns
- using smart technology such as focused messaging, an automated visa granting process, border control, Wi-Fi based tour guiding techniques, real time tourist traffic monitoring
- providing information services at main tourist attractions
- improving transport hubs for proper guiding
- increasing safety
- preventing touting
- improving public transport and standardizing taxi services
- introducing tourists friendly tour guiding, ticketing and advanced booking systems
- ensuring clean sanitary facilities

The GoSL took several measures to rebuild the tourism industry after the Easter Sunday attacks with the special emphasis on the tourism promotion, financial and fiscal support to sectors to tourism-related activities (CENTRAL BANK OF SRI LANKA | ANNUAL REPORT 2019, 2020).

- In accordance with that, a debt moratorium was introduced in May 2019 on both capital and interest payments related to credit facilities to registered businesses in the industry. This was valid until end March 2020 has been extended due to the outbreak of the COVID-19 pandemic.
- Also, a separate relief package was introduced by the government in May 2019 to informal sector stakeholders of the tourism sector.

- Licensed commercial banks were permitted to use the funds in *Jaya Isura* loan scheme under the government's Enterprise Sri Lanka programme and the *Saubagya* loan scheme of the time CBSL to grant working capital facilities to those tourism-related businesses.

Innovative strategies to entice both international and domestic tourists were implemented to keep the tourism sector functioning in the new normal (CENTRAL BANK OF SRI LANKA | ANNUAL REPORT 2020, 2021). The innovative concept of "bio-bubbles" was introduced with the re-opening of the Sri Lankan borders for the tourists in 2021. It was expanded by including more authorized accommodation providers and tourist sites. Also, regional bio-bubbles were negotiated with the countries like Maldives which has opened up for tourism. Along with those, travel corridors were created with other countries.

It has been further emphasized that the tourism related authorities should work with the private sector to improve domestic tourism by minimizing the number of Sri Lankans from travelling abroad for leisure. In order to bring it into practice, the measures of scheduled tour packages for weekends, customized tours for different age groups, educational tours, and retreats and tours for different income groups have been executed in post pandemic period. Following measures were taken into account to develop the domestic tourism in Sri Lanka along with the international tourism.

- Creating more user-friendly and localized information portals on local attractions
- Creating information on arranged tours for locals
- Enhancing the connectivity by providing transportation to tourist sites from city centres
- Addressing the concerns of locals related to personal safety, lack of facilities at tourist sites, noise pollution, having to buy costly tickets at individual tourist attractions, overcrowding etc.
- Introducing the insurance schemes and social safety mechanisms for those who are engaged in the sector in order to face for the unexpected challenges
- Mechanisms to recover due taxes from unregulated accommodation providers and other service providers such as websites that provide a platform for tourism services to be marketed for a fee was developed and strictly executed.

Implementing aforementioned policies and suggestions in timely manner helped to develop the tourism sector in the face of the new normal building the resilience of the sector to sustain as a major foreign exchange earner of the country.

Several measures were taken by the Ministry of Labour in 2020 to improve the industrial harmony and to handle labour issues which was occurred during the pandemic period (CENTRAL BANK OF SRI LANKA | ANNUAL REPORT 2020, 2021).

- Amongst the measures, it was decided that the retention of employees in institutions where work was suspended due to the pandemic and implementing a roster system or any other suitable mechanism to ensure the availability of employment opportunities to all employees in a way to give monthly work proportionately.
- Further, it was suggested that to pay 50 percent of the last paid basic salary or Rs.15, 500 per month in a more favourable to the employee where employees were required to stay at home due to lack of work in the months of May and June 2020. Except the tourism industry, it was needed to seek the approval from the Commissioner General of Labour.
- During the post- pandemic period, the government continued to facilitate industries to address economic crisis ensuring their continuity. In related to that, the CBSL requested licensed banks

and non-bank financial institutions to provide appropriate credit concessions on a case-by-case basis for the affected borrowers in all economic sectors including the Micro, Small and Medium Enterprises (MSME) sector for a period of six months considering the adverse consequences of the pandemic period on those business activities.

- Around USD 13.5 million of the undisbursed amount of the ‘small and medium-sized enterprise line of credit’ loan scheme was reallocated to the SMEs engaged in agriculture, tourism and other export-oriented sectors by providing the affordable working capital loans at a rate determined on Average Weighted Deposit rate (AWDR) plus a reasonable margin.

In 2023, Sri Lanka’s Cabinet has also approved visa-free entry for visitors from seven countries including China, India, Russia, Malaysia, Japan, Indonesia and Thailand as a pilot project until 31st March 2024 with the purpose of attracting more tourists to Sri Lanka to five million over coming years. Also, GoSL has identified the importance in investment to enhance the performance of the sector by approving 22 projects which collectively include the development of 1,080 rooms in 2023 (Post-COVID-19 Challenges and the Way Forward for Sri Lanka Tourism | Daily FT, n.d.)

Discussion

With the presented data of the study indicates that the COVID-19 has severely affected the tourism and hospitality industry which are more inter-dependent with other industries. There is a well-indicated declined trend in the number of tourists in Sri Lanka due to its heavy reliance on the Western European markets such as United Kingdom and Germany who had been hit hard during the pandemic period.

However, the tourism promotion campaigns and other effective measures that were implemented after the Easter Sunday attack made tourists to visit Sri Lanka again with the gradual recover since June 2019. Unfortunately, again the tourist arrivals which were already affected by Easter Sunday attacks in 2019 was further declined by 73.5 percent in 2020. Lifting the international and domestic travel restrictions, introducing the bio-bubbles for international tourists along with the attractive tour packages have made month-on-month growth in tourists arrivals at the end of the same year. Moreover, domestic tourism activities were rebounded as many hotels offered exclusive discounts for local travellers.

Reshaping and repositioning of Sri Lankan tourism industry was more concerned in this period with the implementation of health guidelines by the tourism related businesses and both international and domestic tourists. With the government action of opening the gate for the national and international investments in the tourism and hospitality industry, many international chain hotels are functioning island wide with larger accommodation capacity.

Amongst the top ten source markets by December 2021, India, Russia and United Kingdom were ranked as first three countries with the share of 42 percent and 12 percent by each latter country respectively (TOURISM Sector, n.d.). Even though the tourists’ arrivals have been increased in 2021 slightly but remained around 69 percent below 2019 levels with the moderate rebounding of domestic tourism.

By 2022, Colombo was listed as the best destinations to travel in 2022 and Sri Lanka was in twenty best places to visit in 2020 as per the CNN Travel’s. Sri Lanka was also ranked as one of the top 25 islands in the world as per the travel+ leisure magazine for 2021, No.04 as the world’s top Wellness Tourism Destination best for spiritual health by Global Wellness Institute, 5th best country in the world to travel to in 2021 by the Conde Nast 2021 Readers’ Choice Awards and won “Back on the Map” award offered by Wanderlus Reader Travel Awards 2020 ((TOURISM Sector, n.d.).

Despite of aforementioned rankings, Sri Lanka as one of the top tourists' destinations in the world, it has some left key areas to be invested in order to have modernized tourism industry rather than a conventional one. Investing in leisure and recreational activities such as golf course, theme parks, shopping complexes, water sports; tourist accommodation and services including hotels, resorts, villas; adventure and eco-tourism; transportation including yacht marina, coastal ferry services, cruise lines and skill development such as hotel, hospitality training institutes were pinpointed as the most concerned areas (TOURISM Sector, n.d.).

Conclusion and Recommendations

It is evident fact that Sri Lankan tourism industry and its related activities and services were severely affected by the COVID-19 pandemic. Mainly, tourist earnings and earnings from food and accommodations sectors were declined in a larger amount with the travel bans and import bans so on. During the pandemic, it was found that Sri Lankan tourism industry was highly depended on the European regional countries such as Ukraine and Russia rather than focusing on other regions such as Asia, Pacific so on. In addition to that, international tourism was highly highlighted and heavily relied by Sri Lankan community rather than domestic tourism. With the policy implementations in related to those concerns and others, the performance of the Sri Lankan tourism industry is being recovered following the policies on domestic tourism, financial relief schemes and debt moratorium for the affected MSMEs by the pandemic during the pandemic period. To attract regional tourists from Asia and Pacific, the visa free scheme was implemented recently by GoSL including China, India, Russia, Malaysia, Japan, Indonesia and Thailand as a pilot project. The potential of Sri Lankan tourism industry remains largely unexplored due to the obsolete technology which is being used in the industry since a long period. With the repercussions of the Easter Sunday attack and the COVID-19, it has been emphasized that Sri Lanka's tourism industry is needed to embrace new technology and attract investors to promote and sustain the industry. In order to bring the tourism industry to its full capacity, it is worthy to address the issues of clustered overcrowding, low quality tourism infrastructure and lack of attractions to serve tourists of all ages.

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