

ANTYRA
SOLUTIONS
SINGAPORE · SRI LANKA



**SRI LANKA
HOTEL SECTOR
IMPACT ONLINE**

PRELIMINARY EDITION

2019

17TH MAY

Researched and Published By
ANTYRA SOLUTIONS (PRIVATE) LIMITED

Note

This report is published by Antyra Solutions (Private) Limited, in order to understand the impact of the Easter Sunday Attacks and its aftermath on the Hotel Sector, online. This report acts as a preliminary analysis, given the recency of the events that occurred. Newer editions of the report will be published when further data is available.

This report is an independent initiative by Antyra Solutions (Private) Limited, an integrated agency specializing in Travel and Hospitality marketing. The views expressed are private and unaffiliated with any governmental or tourism organization.

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Report Overview

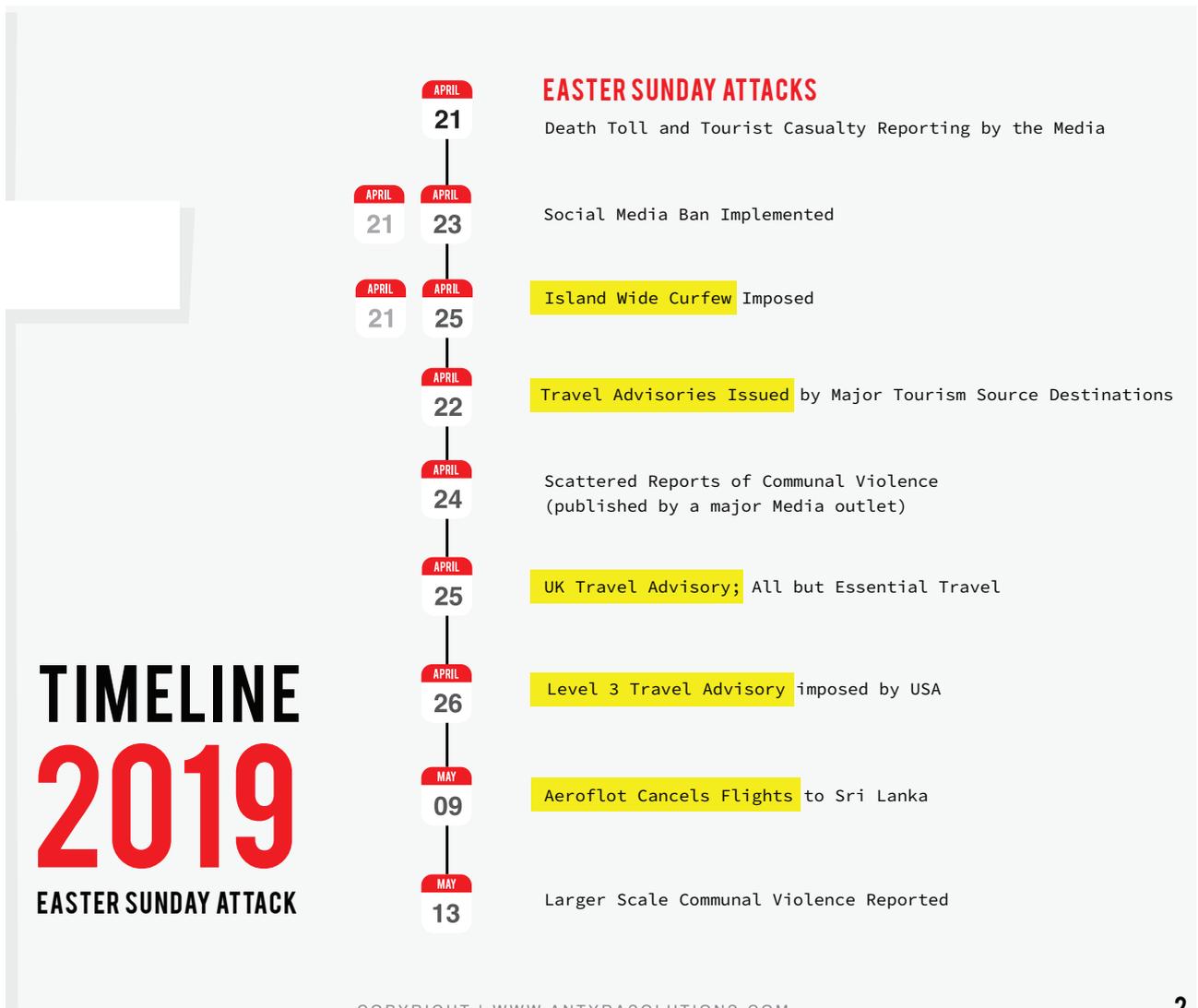
The purpose of this report is to offer context to the online chatter and better understand the impact to Sri Lanka's Hotel Industry online, post the Easter Sunday Attacks of 21st April 2019 and incidents of communal violence in the days that followed. The report is compiled through a collection of data from publicly available research tools, paid monitoring tools and private data collated with the permission of 54 individual hotels, resorts, villas and other boutique properties belonging to prominent hospitality brands (3 stars and above + boutique / luxury properties).

The creation of this report and interpretation of data offered is by Antyra Solutions (Private) Limited and the sentiments expressed are wholly private. Data from budget, B&B and similar accommodation types are not included in this initial publication.

Online channels monitored include Google, Blogs, Forums, Social Media, News Sites, Hotel Brand Website and Booking Engine Platforms.

Note

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Situation Analysis | Online Reaction

Methodology

Monitoring Period

21st April 2019 —→ **15th May 2019**

Trend Plotting

10th April 2019 —→ **15th May 2019**

(to better highlight pre-incident vs. post-incident trend)

Topics of conversations and online search patterns were monitored during the period defined to better understand volume, tone and light of the dialogue relating to Sri Lanka.

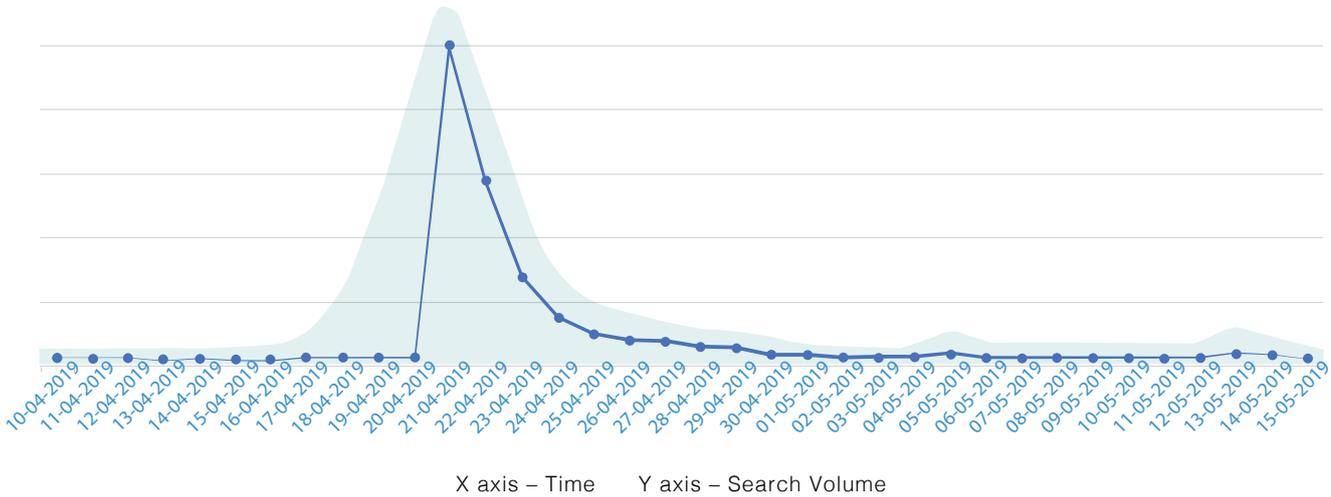
Search terms were used to understand the demand for information, 'what do people want to know'. Mention monitoring was introduced to track online conversations across Social Media, Web, Forums and Blogs to identify mentions that included the term "Sri Lanka" as an insight to 'what people are talking about'. To offer a better perspective of non-Sri Lankan exposure and sentiment, mention monitoring excluded conversations from Sri Lanka.

To address technology specific biases and tool specific tracking methods, the same monitoring platforms were used across this study to offer comparable context in all monitoring results, across all points of comparison. To categorize data sets for comparison the time period before 21st April 2019 will be referred to 'pre-incident' and the period starting from 21st April 2019 will be referred to as 'post-incident'.

The objective is to better ascertain the reaction of a global audience.

Demand for Information

A Situation Analysis was carried out for the purposes of understanding the interest in Sri Lanka following the terrorist attacks on 21st April 2019 and the events that followed. Since the events unfolded, there was an immediate spike in Sri Lanka-related online queries and topics, as measured on Google. Search terms used during this period point to a clear demand to understand the unfolding situation by a global audience. Topics were primarily focused on the terror attacks, safety and links to terrorist organizations.



Top Search Terms Contributing to the Spike in Interest

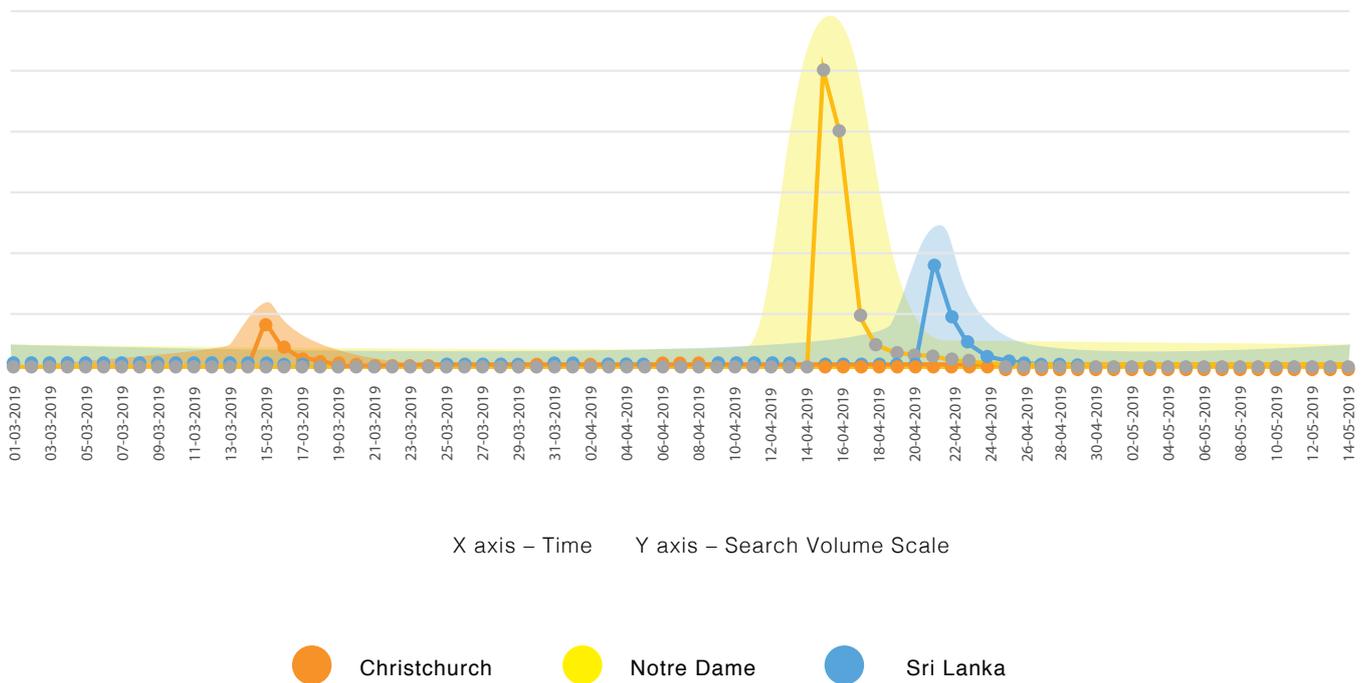
- | | | |
|--------------------------------|-----------------------------------|-----------------------------------|
| sri lanka bombings | sri lanka blast news | attentato sri lanka |
| sri lanka bomb blast | pray for sri lanka | aanslag sri lanka |
| sri lanka atentado | bombing in sri lanka | bombings in sri lanka |
| sri lanka blasts | sri lanka explosions | sri lanka bomb |
| blast in sri lanka | bombing sri lanka | what happened in sri lanka |
| srilanka blast | srilanka bomb | is sri lanka safe |
| anders holch povlsen* | sri lanka atentados | srilanka safety now |
| bomb blast in sri lanka | curfew sri lanka | Sri lanka ISIS attack |
| sri lanka blast | sri lanka bomb blast today | |

*Anders Holch Povlsen – The Danish Billionaire that tragically lost three children in the Easter Sunday Attacks.

Terms highlighted in yellow are likely direct Tourism related queries.

Search interest waned significantly within a 7-day period following the attack, which can be construed as a slow-down in demand for further information. Large scale communal violence was reported from 13th May 2019 across parts of the island but a noticeable increase in Sri Lanka related online queries cannot be seen.

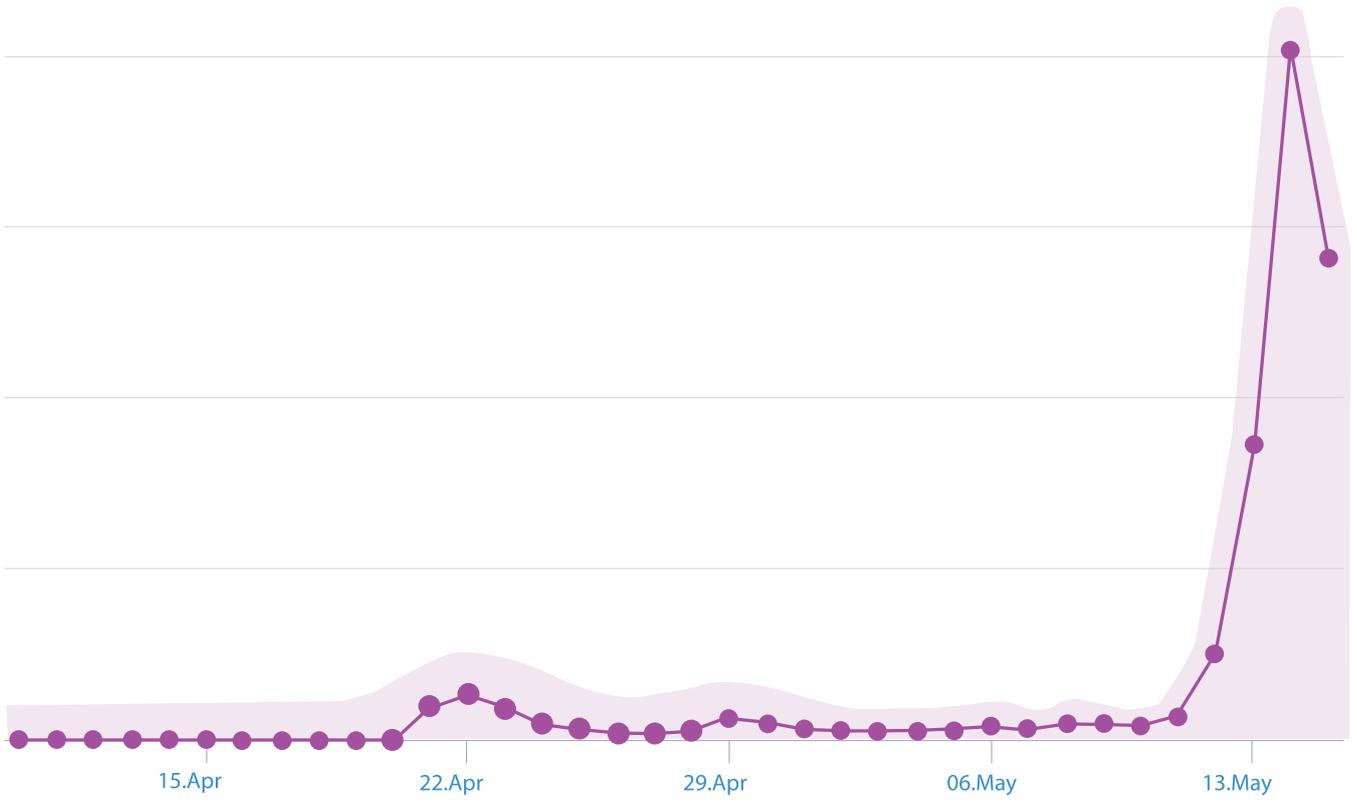
Comparing recent global events, to offer context of scale



Con conversationally, the demand for information regarding Sri Lanka post-incident is estimated to be significantly higher to the global audience reaction of the Christchurch attack. Both events are dwarfed by the Notre Dame fire and demand for said information.

Online Conversations

Topics of conversation across content platforms such as social media, news sites, forums, blogs and similar also showed significant levels of activity in the immediate aftermath of the attack.



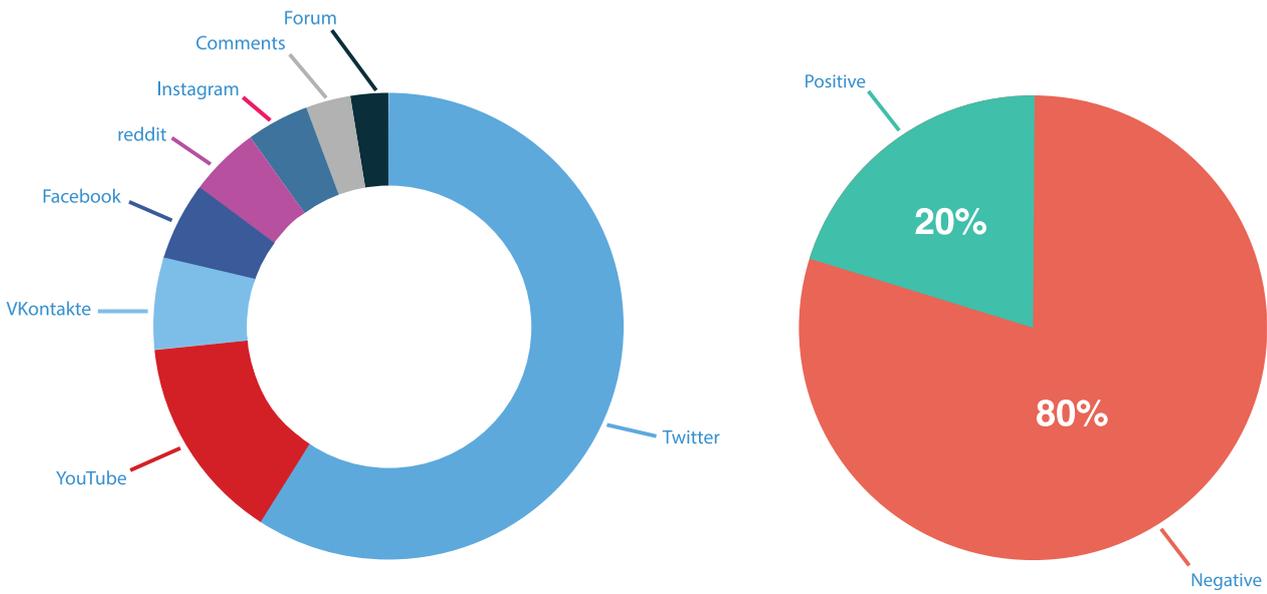
X axis – Time Y axis – No. of mentions



A 556,575% increase in mentions across social media and content sites were seen comparing 10th April 2019 to 15th May 2019 to the previous 35 days. Mentions of Sri Lanka were estimated to be seen 119,745,025 times

(impressions of mentions as monitored via a listening tool.)

Contrary to the 'demand for information' pattern as measured through Google Searches, conversations during the 13th May 2019 communal violence episode generated a larger conversation on content sites, with the largest contribution to same from Twitter, with an overwhelmingly negative sentiment.



Snapshot from sources



Source: <https://twitter.com>



Coffins of victims are carried during a mass for victims, two days after a string of suicide bomb attacks on churches and luxury hotels across the island on Easter Sunday, in Colombo, Sri Lanka April 23, 2019.
 Dinuka Liyanawatte | Reuters

Source: www.cnbc.com

CJ Werleman @cjerleman Follow

This Muslim owned pasta factory was burnt to the ground by extremist mobs yesterday.

70% of the staff employed were Sinhalese (Buddhists).

Witnesses say a group of at least 500 mobs destroyed the factory in Minuwangoda, Sri Lanka.

via DOAM.



10:01 PM - 14 May 2019

1,815 Retweets 1,647 Likes

85 1.8K 1.7K

Source: <https://twitter.com>

CNN @CNN · Apr 21

This photo taken at St. Sebastian's Church, one of several holy sites attacked in Sri Lanka on Sunday, captures the horror many experienced this weekend cnn.it/2DkOs51

62 365 914

Source: <https://twitter.com>

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WORLD | ASIA

FOX NEWS & INVESTMENT SIEMENS Incredible India

Buddhist Mobs Target Muslims in Sri Lanka Following Deadly Easter Bombings

New violence plagues nation following church attacks that were claimed by Islamic State militants

By *Saeed Shah and Viditha Jayasinghe*
May 14, 2019 1:19 p.m. ET

COLOMBO, Sri Lanka—Rampaging mobs from the majority Buddhist population attacked Muslim communities Monday night, police and witnesses said, igniting fears of a new phase of violence in Sri Lanka following deadly church bombings on Easter Sunday claimed by Islamic State.

The new attacks occurred in a cluster of towns in the country's northwest, where the Muslim minority are often owners of shops and other businesses. In interviews, some Muslim residents said they hid inside as the mobs approached, while others fled.

THE AI EXPECTATIONS GAME

What's the key to navigating successful digital transformation?

LEARN MORE

Source: <https://www.wsj.com>

Sri Lanka is burning — again



Government troops in Mullaitivu, Sri Lanka, on May 17. (Jeham S. Kodikara/AFP/Getty Images)

By *Amarath Amarasingam* and *Lisa Fuller*
May 17

Amarath Amarasingam is a senior research fellow at the Institute for Strategic Dialogue, and the co-editor

Source: <https://www.washingtonpost.com>

RT @RT.com Follow

86% of existing bookings to #SriLanka hotels were cancelled during the 3 days after the deadly blasts on #EasterSunday

Big blow to tourism & economy: Sri Lanka struck by hotel cancellations after ...
Recent terror attacks delivered a huge blow for the Sri Lankan tourism industry. President Sirisena said, as the country is still on high alert after the Easter bombi...

Source: <https://twitter.com>

Buddhists are carrying out a wave of terrorism against Muslims in Sri Lanka, and it's happening so easily because Buddhists are tapping into the same anti-Muslim conspiracies that were generated and distributed by genocidal Buddhists in nearby Myanmar.

Annie Thomas 2 days ago
REACH: 30,113 INTERACTIONS: 1,093 ENGAGEMENT RATE: 3.33% INFLUENCE: 110

@EU_in_Sri_Lanka issues the following statement in agreement with the Embassies of France, Germany, Italy, Netherlands, Romania and the UK High Commission, as well as the Embassies of Norway and Switzerland. "We are concerned about the recent incidents of communal violence". <https://t.co/BRgubCcmvP>

Sofie 2 days ago
REACH: 2,289 INTERACTIONS: 76 ENGAGEMENT RATE: 3.33% INFLUENCE: 110

Businesses in SRI LANKA n capital advise staff to stay indoors amid security threats

Peggy Boston 2 days ago
Businesses in SRI LANKA n capital advise staff to stay indoors amid security threats COLOMBO, SRI LANKA — The Latest on the ... Australian link was part of an ongoing investigation and wouldn't comment further. CLERIC 'MASTERMIND' BEHIND SRI LANKA

VIEWS: 1 COMMENTS: 0 LINKS: 0 EXLIKES: 0

Source: <https://twitter.com>

Snapshot of Post-Incident Content

Online queries on Search Engines lead users to websites. An analysis of the content and topics on said websites visited by those in the United Kingdom, is offered as a snapshot to better understand content consumption post the Easter Sunday Attacks. 'Sri Lanka Safe' was used as the primary search term to filter content and the United Kingdom was chosen as it is a primary tourism source market.



Examples of questions asked about the 'Easter Sunday Bombings' by UK users on Search Engines

- What is happening in Sri Lanka and the explosions in churches?
- What is Pakistan's role in Sri Lanka blasts on April 2019?
- What buildings have been targeted for explosions in Sri Lanka?
- What happened in the Sri Lankan attack?

Top Headlines from websites / content served in response to the above questions are shown for reference

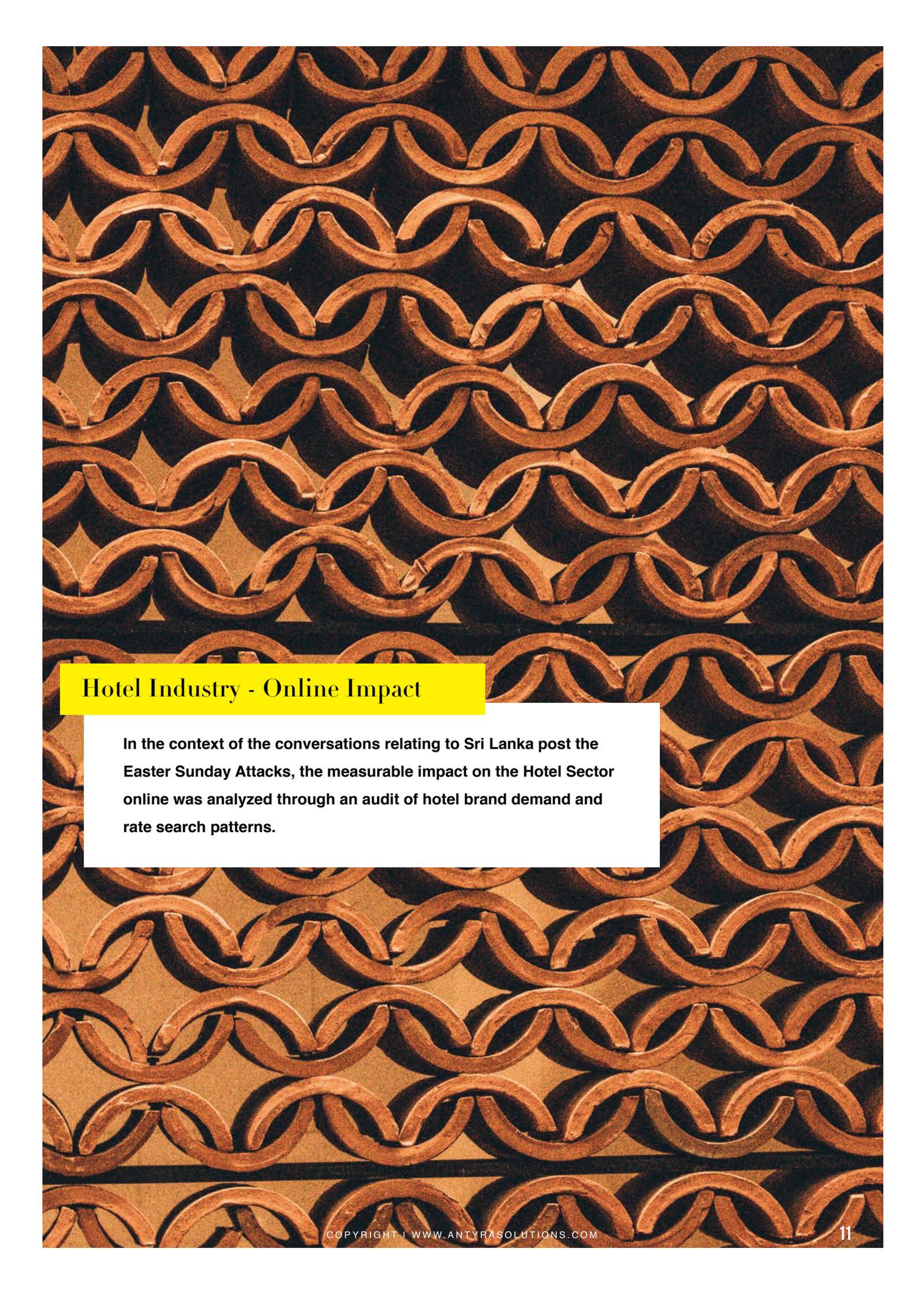
Sri Lanka's tourism sector counts the toll of Easter attacks
Sri Lanka attacks: What we know about the Easter bombings
Easter bombs are a test of Sri Lanka's faith relations
Sri Lanka's President: Country Is Safe After Easter Attacks
Police arrest more than 100 after anti-Muslim riots – Sri Lanka attacks
Sri Lankan Muslims fear for safety after Easter Sunday attacks
Sri Lanka Bans Face Coverings After Easter Sunday Attacks
Sri Lankan churches hold first Sunday masses since attacks
Sri Lankan church schools to reopen after Easter bombings
Sri Lanka's hotels, beaches and eateries now empty of tourists

Examples of questions asked about 'Travel Planned (to Sri Lanka)' by UK users on Search Engines

How safe is Sri Lanka for travel one month after the attack?
Is it safe to travel to Sri Lanka?
Is Sri Lanka still safe to visit?
Is it safe to travel to Sri Lanka in June 2019?
Is Colombo, Sri Lanka a safe place to visit?
Is a trip to Sri Lanka in July advisable?

Top Headlines from websites / content served in response to the above questions are shown for reference

Sri Lanka travel advice
Travel insurance 'will not cover' cancelled Sri Lanka holidays
Crime and safety
Is It Safe To Travel To Sri Lanka Right Now
Sri Lanka
Latest Sri Lanka Travel Alerts and Warnings
Travel Advisor Risk and Responsibility in Sri Lanka – Skift
Is Sri Lanka safe to travel? Everything you need to know! [2019 guide]
Sri Lanka: after the terror attacks, what are travellers' options?



Hotel Industry - Online Impact

In the context of the conversations relating to Sri Lanka post the Easter Sunday Attacks, the measurable impact on the Hotel Sector online was analyzed through an audit of hotel brand demand and rate search patterns.

Online Brand Impact

The difference in brand search volumes post the Easter Sunday Attacks as well as in comparison to 2018.

Methodology

Review period

21st April 2018 —→ **4th May 2018**

21st April 2019 —→ **4th May 2019**

A sample of 54 individual hotels (3 star and above), villas and boutique properties belonging to prominent hospitality brands in Sri Lanka were used in this study.

An online search for a specific hotel brand name (and its permutations) is used as a measure of 'direct intent', a user wanting more information specifically about said brand. The volume of searches and weekly / monthly patterns in volume can be used to infer the time-based demand for a specific brand.

Note

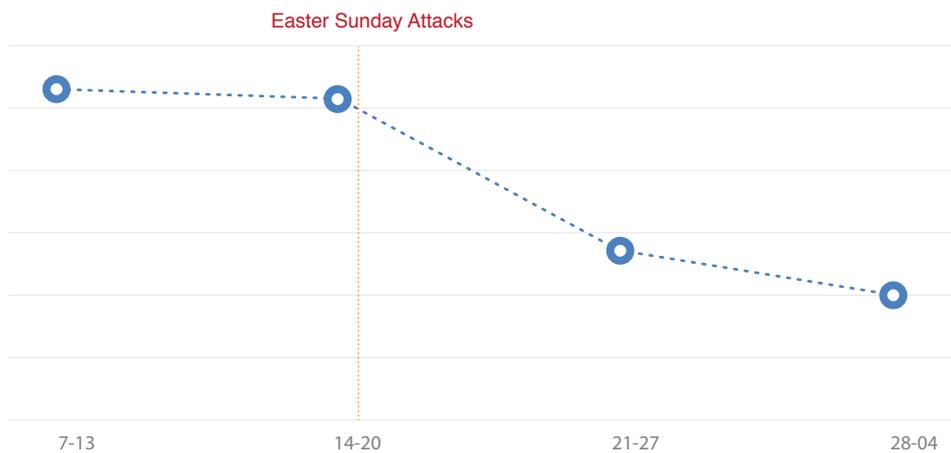
Sri Lanka typically experiences a 'high' and 'low' season for tourism arrivals corresponding to Monsoons / rainy weather. The 'low' season starts in mid-April and a usual pattern of decline can be seen from March to April and May. After the Easter Sunday Attacks, a larger than normal decline is visible. A year-on-year analysis is also provided to quantify the difference in demand beyond the usual 'low' season decline.

If a significant shift in Google ranks had occurred during periods of review, said data points were removed.

Brand Demand Trend

Period

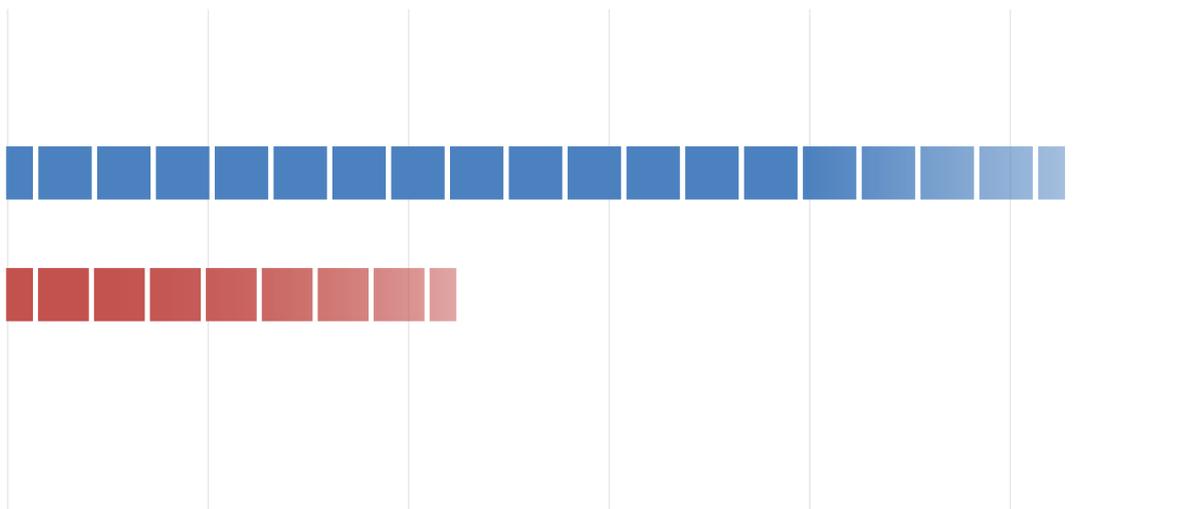
21st April 2019 → **4th May 2019**



X-axis: Aggregated Volume of Search Impressions Y-axis: Time Period

Brand Demand Data from 7th April to 4th May 2019

A sharp decline is visible from 21st April 2019 onwards.



● Brand Search Volume - 7th April to 20th April 2019

● Brand Search Volume - 21st April to 4th May 2019

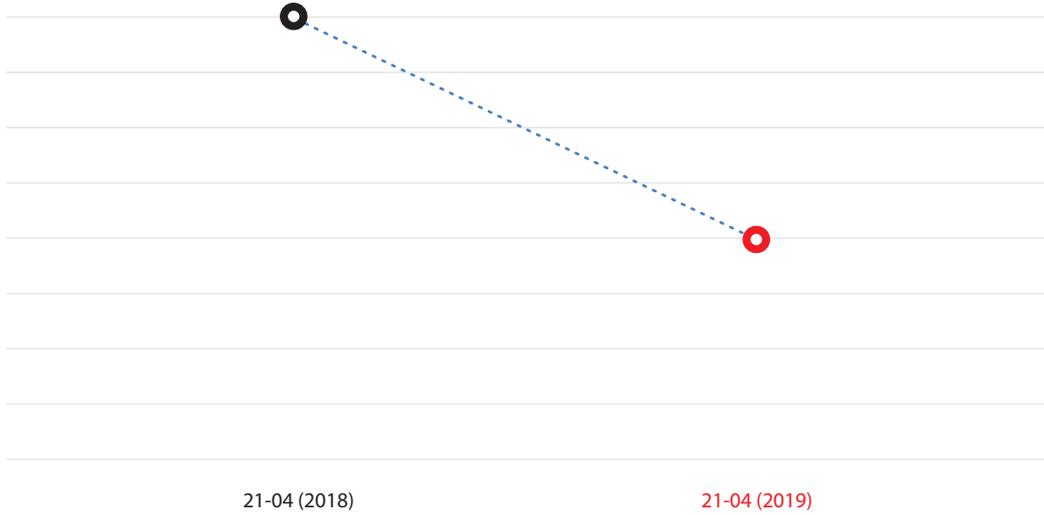
A drop of 56.69% can be seen across all properties reviewed.

Brand Demand Trend 2018 vs 2019

Periods

21st April 2018 → 4th May 2018

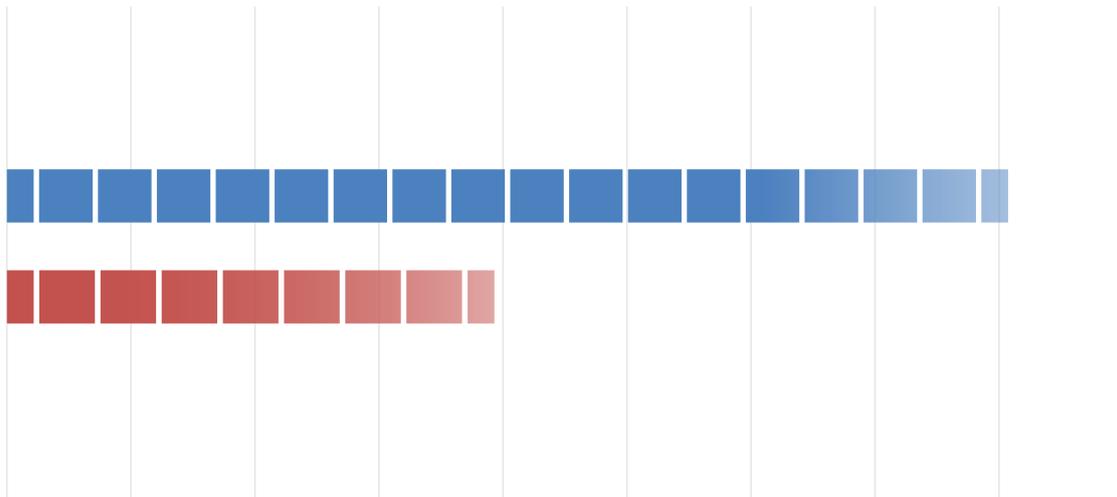
21st April 2019 → 4th May 2019



X-axis: Aggregated Volume of Search Impressions Y-axis: Time Period

Brand Demand Data from 7th April to 4th May 2018 vs 2019

A considerable year-on-year decline can be seen.



● Brand Search Volume – 21st April to 4th May

● Brand Search Volume – 21st April to 4th May 2019

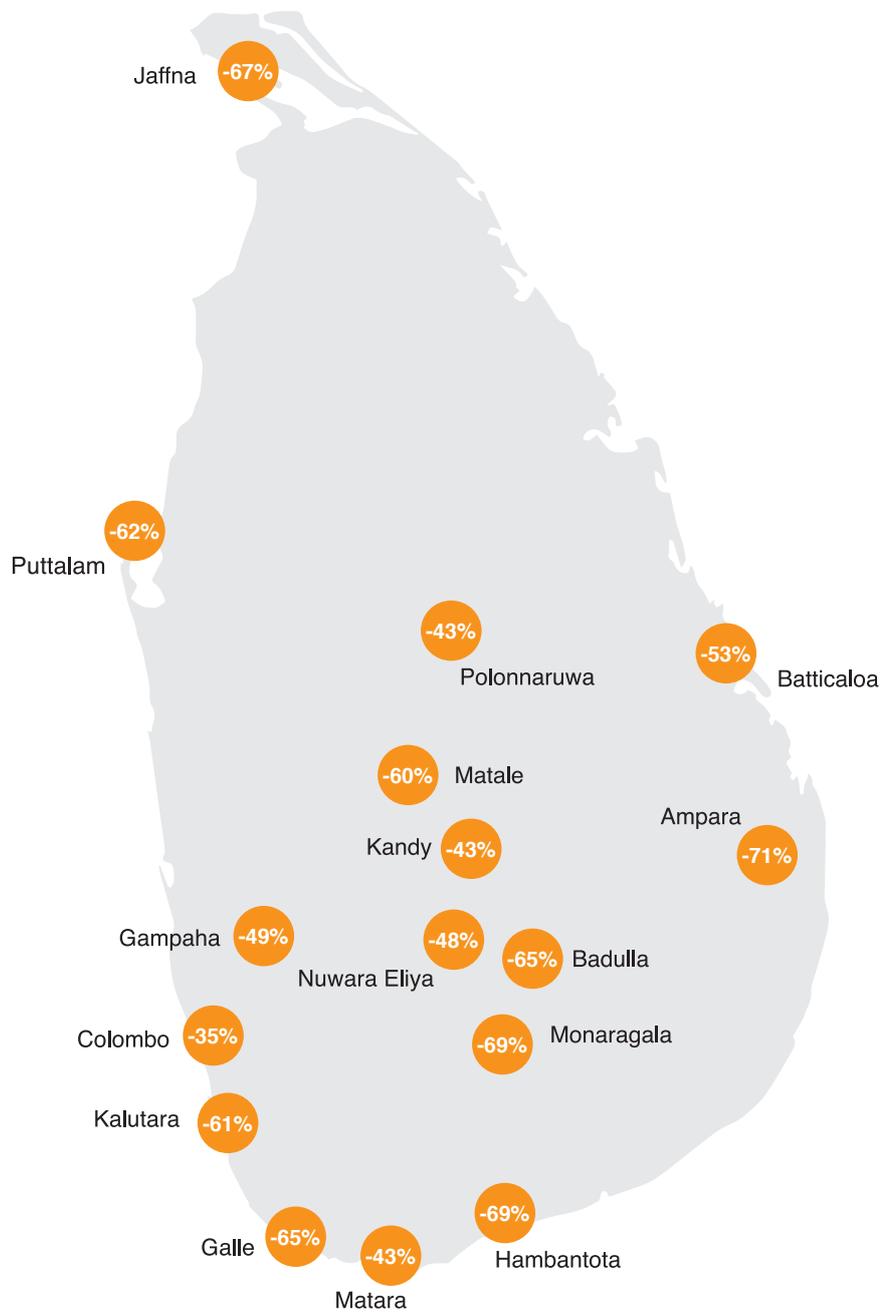
A drop of 51.36% can be seen across all properties reviewed.

Demand Impact by District

Periods

7th April to 20th April → Pre-Incident

21st April to 4th May → Post-Incident



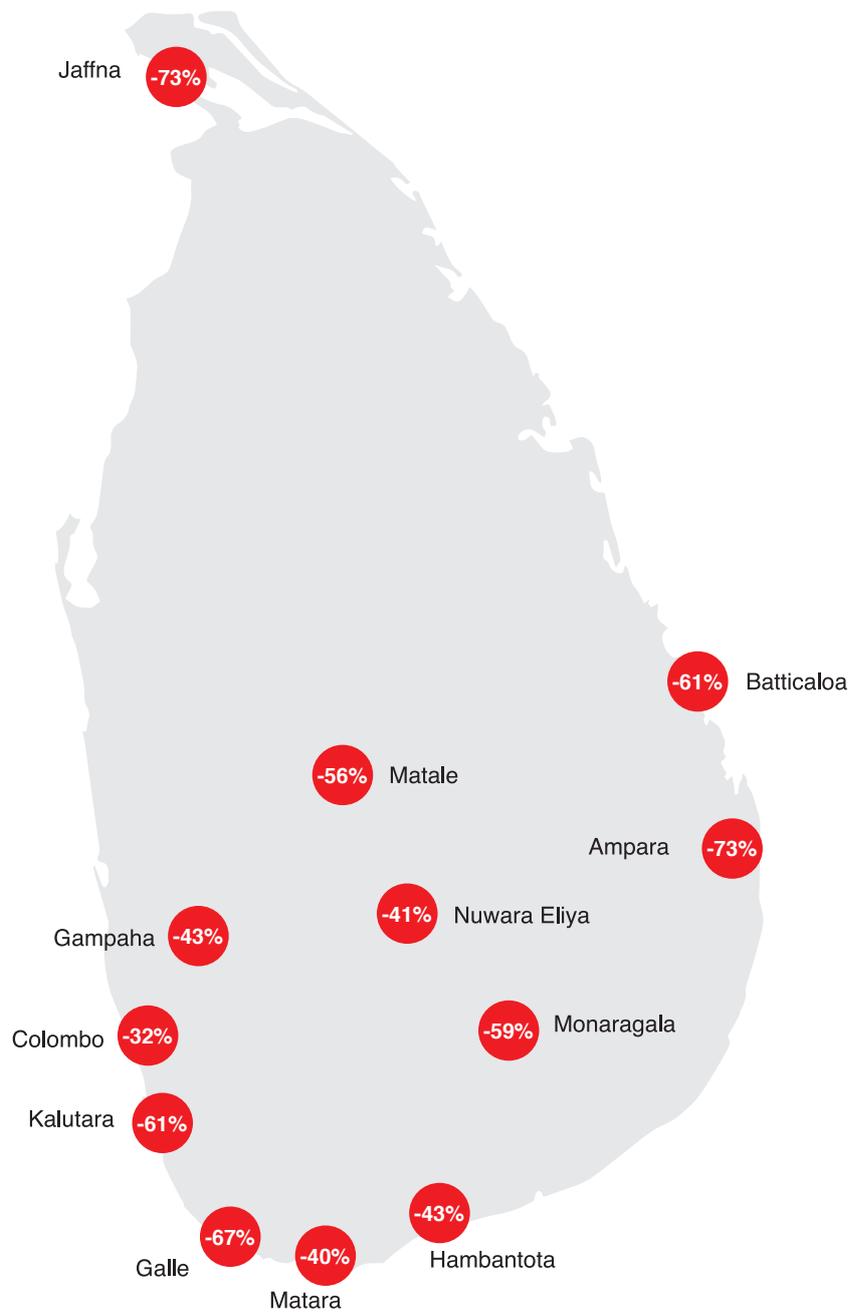
District	Pre-Incident	Post-Incident	Percentage Increase / Decrease
Ampara	1364	401	-71%
Badulla	1806	631	-65%
Batticaloa	1879	882	-53%
Colombo	1895	1232	-35%
Galle	15465	5440	-65%
Gampaha	28574	14563	-49%
Hambantota	12136	3779	-69%
Jaffna	1862	617	-67%
Kalutara	9127	3549	-61%
Kandy	86	49	-43%
Matale	11983	4827	-60%
Matara	4202	2377	-43%
Monaragala	1531	468	-69%
Nuwara Eliya	11666	6062	-48%
Polonnaruwa	277	158	-43%
Puttalam	1166	444	-62%

Demand Impact by District 2018 vs 2019

Periods

21st April 2018 → 4th May 2018

21st April 2019 → 4th May 2019



District	2018	2019	Percentage Increase / Decrease
Ampara	1498	401	-73%
Batticaloa	2260	882	-61%
Colombo	1820	1232	-32%
Galle	11842	3912	-67%
Gampaha	22535	12900	-43%
Hambantota	6080	3492	-43%
Jaffna	2316	615	-73%
Kalutara	7960	3141	-61%
Matale	10610	4703	-56%
Matara	3860	2330	-40%
Monaragala	1150	468	-59%
Nuwara Eliya	8804	5190	-41%

Note

The hotels reviewed are not evenly distributed among regions reviewed. 2018 data is unavailable for some properties reviewed. Said properties and districts located were removed during the year-on-year comparison.

Online Rate Demand

Rate searches on brand websites are used to quantify booking demand and planning intent. The difference in volume and trend are used to quantify the effects of the Easter Sunday Attacks and its aftermath on online bookings.

Methodology

Review Period

21st April 2018 —→ **15th May 2018**

21st April 2019 —→ **15th May 2019**

Of the 54 participating properties, 34 have online booking engines available from 2018 to offer a rate search trend comparison. When a user visits an online booking engine connected to a hotel brand website and enters a check-in / check-out date to conduct a rate search, it is considered a rate request and indicator of booking intent. The rate searches conducted during a specific period is used to infer demand during said period while the check-in date is used to infer the time-period of travel.

In analyzing online booking demand, paid online advertising efforts such as Search Engine Advertising and Social Media Advertising would differ during the periods reviewed. As such, these data sources were also removed, evaluating non-paid channels only.

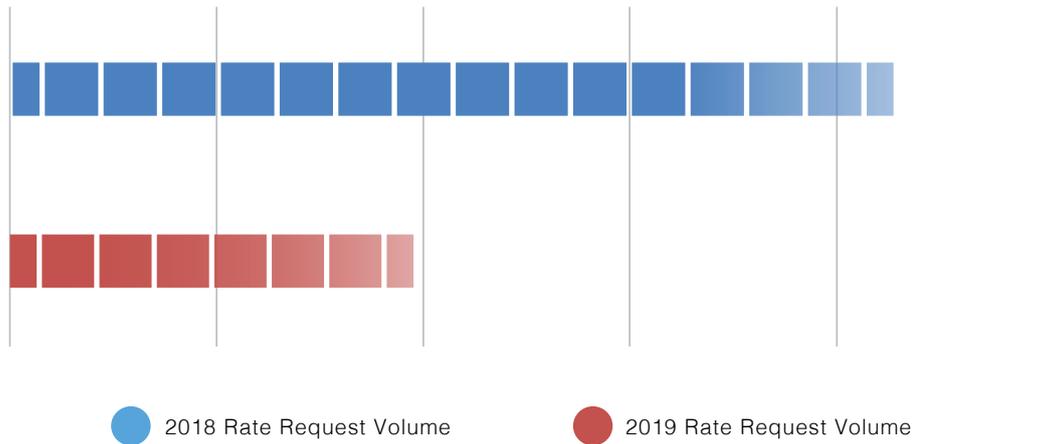
As most properties shifted focus to local promotions in the immediate aftermath, statistics from Sri Lanka were removed to offer a more accurate picture of non-Sri Lankan demand.

Booking Demand Volume Comparison 2018 vs 2019

Review Period

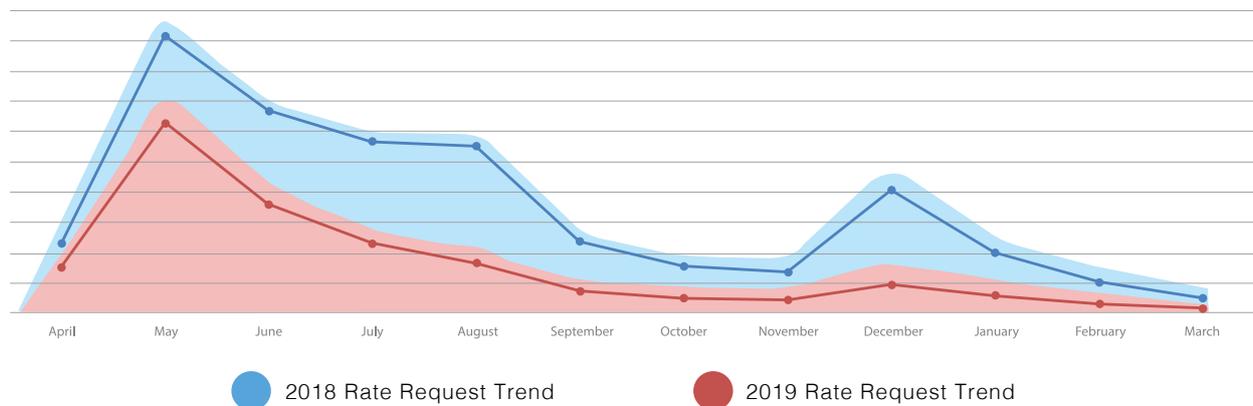
21st April 2018 → 15th May 2018

21st April 2019 → 15th May 2019



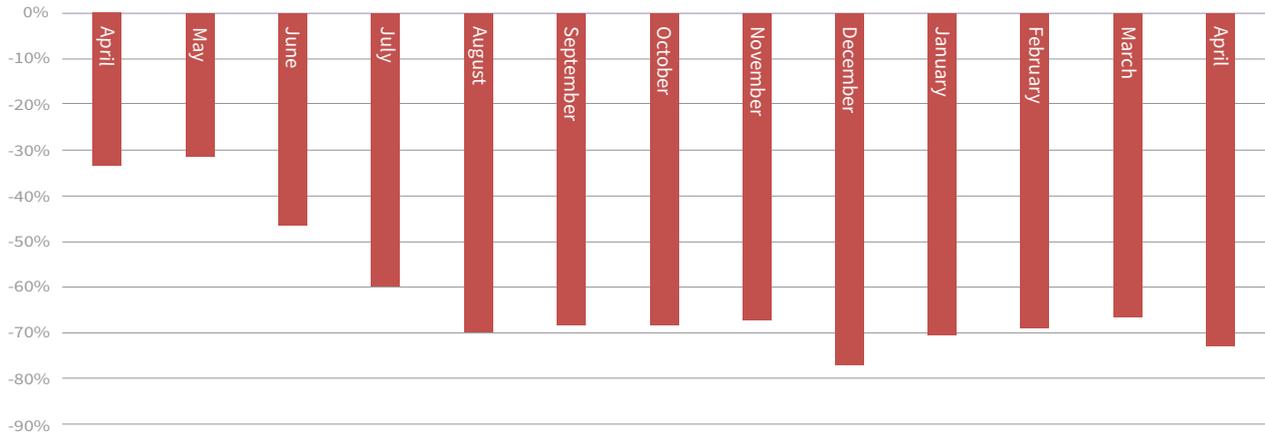
A 55.10% decrease in booking demand outside of Sri Lanka can be seen.

Booking Demand Trend 2018 vs 2019



Using the check-in date of a rate search, the year-on-year demand for specific months during the period of review was analyzed.

Demand Percentage Variance 2018 vs 2019



Percentage Decline of Booking Demand: 2018 vs 2019

Using the check-in date of a rate search, the year-on-year demand for specific months during the period of review was analyzed.

Analysis

By Niranka T. Perera | CEO, Antyra Solutions (Private) Limited.

The unfolding situation and recency of the events discussed make it difficult to offer a concrete forecast on future direction. Periodic updates to this report are planned based on the availability of additional data.

Two data points stand out in assessing the situation; the difference in online search behavior and social media / content platform behavior. An immediate spike in Sri Lanka related terms in the aftermath of the Easter Sunday Attacks on Google Search can be interpreted as a demand for information. A global audience trying to understand what happened. This spike gradually declines and in a 45-day analysis of Sri Lanka related topics, we see a demand for Sri Lanka related information normalizing at pre-attack levels, even during episodes of communal violence. Social media and content platforms show a different trend, with communal violence being discussed more than the Easter Sunday Attacks by a non-Sri Lankan audience. Tweets and other forms of content are 'going viral', with people passing on the message as evident through re-tweets and shares. This below the line exposure has the potential to cause long-term harm to Sri Lanka Tourism as potential future travelers can be exposure to on-going negative messaging.



The silver-lining though, is that 1,000s of people are still looking for rates post 21st April 2019.



The analysis of booking demand data from hotel websites show an unexpected trend. We had expected to see a sharper decline in the immediate months after the Easter Sunday Attacks and some level of normalization towards the 2019 Winter Season in comparison to 2018. However, this trend was inverted with April, May, June showing a smaller decline percentage compared to the rest of the year. Further data collection initiatives and later editions of this report will attempt to better explain this trend.

We at present venture an assumption based on two potential factors. First, Travel Bans and the severity levels of same were gradually imposed / changed. The media exposure could also have taken some time during the data collection period. The full impact of these scenarios may have in turn taken time to impact the trend seen. Secondly, travelers who had already made financial commitments, non-refundable bookings or similar may have still considered travelling to Sri Lanka during the rate search period of 21st April to 15th May 2019.

The 60%+ decline in booking demand seen towards the latter stages of the year and early 2020 is a cause for concern as it implies those that had considered travel to Sri Lanka at a future date were now reconsidering same. The silver-lining though, is that 1,000s of people are still looking for rates post 21st April 2019.

As the situation develops, and a tangible response from Governmental authorities, institutions as well as the hotel sector itself take root, online conversation monitoring and booking demand trends will be analyzed periodically. An increase in positive sentiment in the tone of online conversations relating to Sri Lanka and the reduction in the difference in booking demand comparing 2018 vs 2019 will offer a window into the success of efforts made.



Help us Improve

The larger the dataset, the better our forecasting ability. If you would like to add your hotel data to be anonymized and used for the preparation of future editions of this report, do drop us a line at info@antyrasolutions.com.

Additional Resources

Future Bookings

Suggestions for a Faster Recovery



Audit your Data

Better Understand Your Consumer



Build your Digital Strategy



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Sources

- Google Trends
- Google Search Console
- Google Keyword Planner
- Google Analytics
- Paid Social Media Listening Tool
- Paid Topic Research Tool
- Brand Hotel Websites (not identified by name to maintain anonymity of data)
- Guestination (Antyra's Booking Engine Platform)
- www.gov.uk
- www.nytimes.com
- www.adaderana.lk
- www.time.com
- www.twitter.com
- www.wsj.com
- www.washingtonpost.com

* * *

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