



Monthly Tourist Arrivals Report:

A Monthly Snapshot of International Arrivals to
Sri Lanka from Immigration Statistics

February 2022

Sri Lanka Tourism Development Authority



Introduction

The following document provides a synthesis of the most recent February, 2022 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 28th February 2022, and subject to change. The data provides an overview of month-on-month and annual changes in visitor arrivals to Sri Lanka from international source markets. The data is meant to provide an overview of how travel and tourism is performing to Sri Lanka.

This report is developed by the Research & International Relations Division at Sri Lanka Tourism Development Authority (SLTDA), with the technical support from the Australian Government funded Market Development Facility (MDF Sri Lanka) and Twenty31 Consulting Inc. Questions, comments and feedback are welcome and will support the future amendment and enhancement of the report to ensure it meets the data and insights needs of Sri Lanka's Government and industry stakeholders.





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Summary

The total number of international tourist arrivals to Sri Lanka during February 2022 was 96,507. This significant improvement during the month of February follows the sharp contraction in arrivals after the month of April, 2021. This reflects the improvement in international arrivals potentially owing to factors such as vaccination advances around the world, softer restrictions for vaccinated travellers,

use of digital tools to facilitate safe travel, such as the EU COVID Certificate and growing consumer confidence in some outbound source markets.

As of 28th February 2022, 178,834 international tourists had visited Sri Lanka for this year. The largest source markets recorded for the month of february were Russia, India, the United Kingdom, Germany, followed by France.

Table 1. Monthly tourist arrivals, February 2022

Month	2021	2022	% change 2022/21
January	1,682	82,327	
February	3,366	96,507	
March	4,581	-	
April	4,168	-	
May	1,497	-	
June	1,614	-	
July	2,429	-	
August	5,040	-	
September	13,547	-	
October	22,771	-	
November	44,294	-	
December	89,506	-	
TOTAL	194,495	178,834	



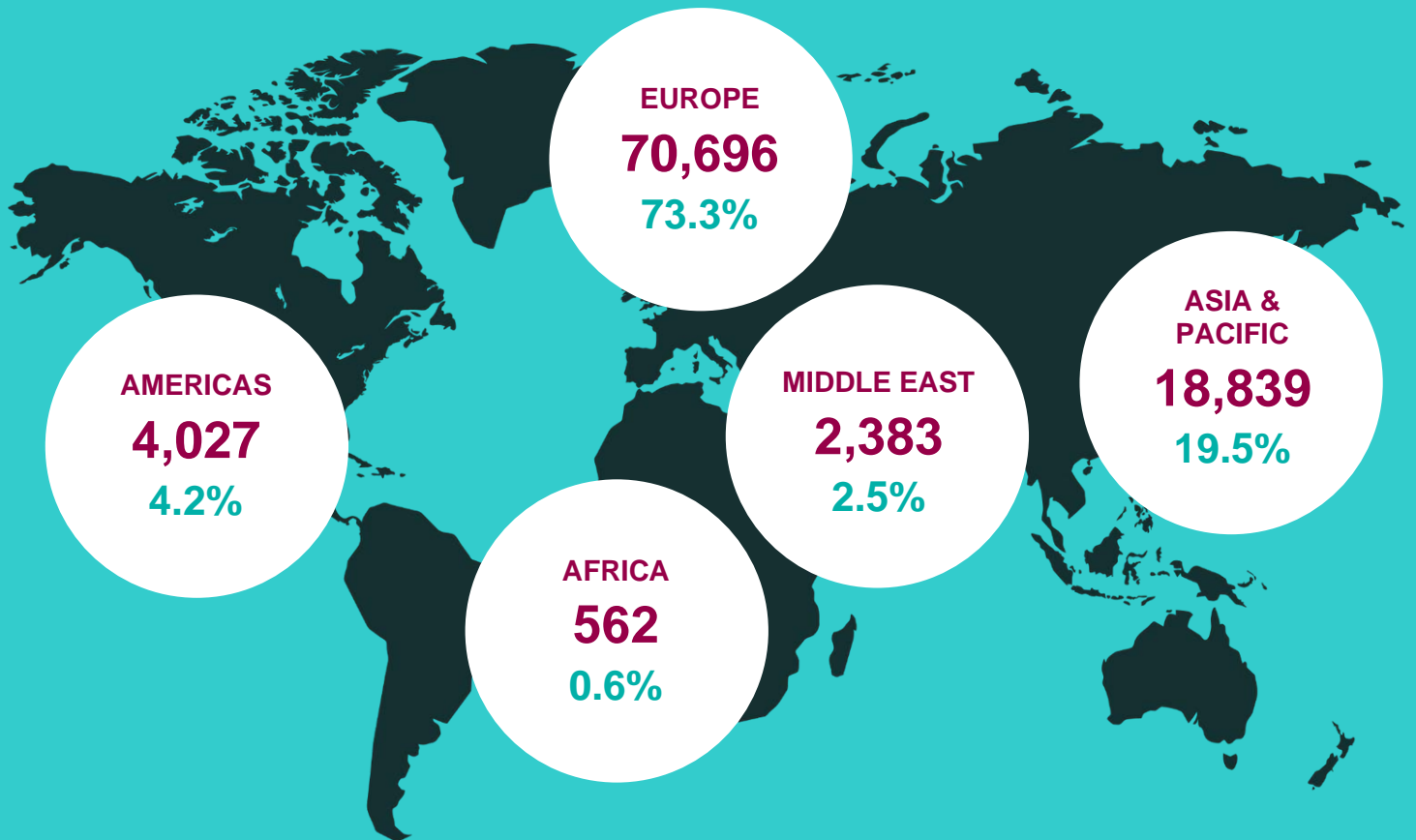
Tourist Arrivals | February 2022

96,507



Tourist arrivals by region and percentage share February 2022

Map 1. Tourist arrivals by region and percentage share



Europe became the largest source of tourist traffic to Sri Lanka with 73.3% of the total traffic received in February 2022. Pent up demand especially from countries such as Russia, India, the United Kingdom, Germany and France is likely to have driven this growth momentum. Asia and the Pacific accounted for 19.5% of total arrivals. The Middle East accounted for 2.5% of the total traffic while the Americas accounted for 4.2%.

February being a peak month for tourist arrivals in Sri Lanka, it is anticipated that arrivals will continue to grow towards the month of March, expect for arrivals especially from Eastern European countries such as Russia and Ukraine. While signs of recovery were evident till the end of February, again the market uncertainty continues to overshadow the tourism industry with the invasion of Ukraine by Russia that has sent shocking waves to many destinations. It is expected that the crisis in Ukraine will have far reaching implications on many source markets and will further dampen consumer confidence which was gradually building after the devastating Omicron variant.



Top primary markets and top potential markets February 2022

Top primary markets

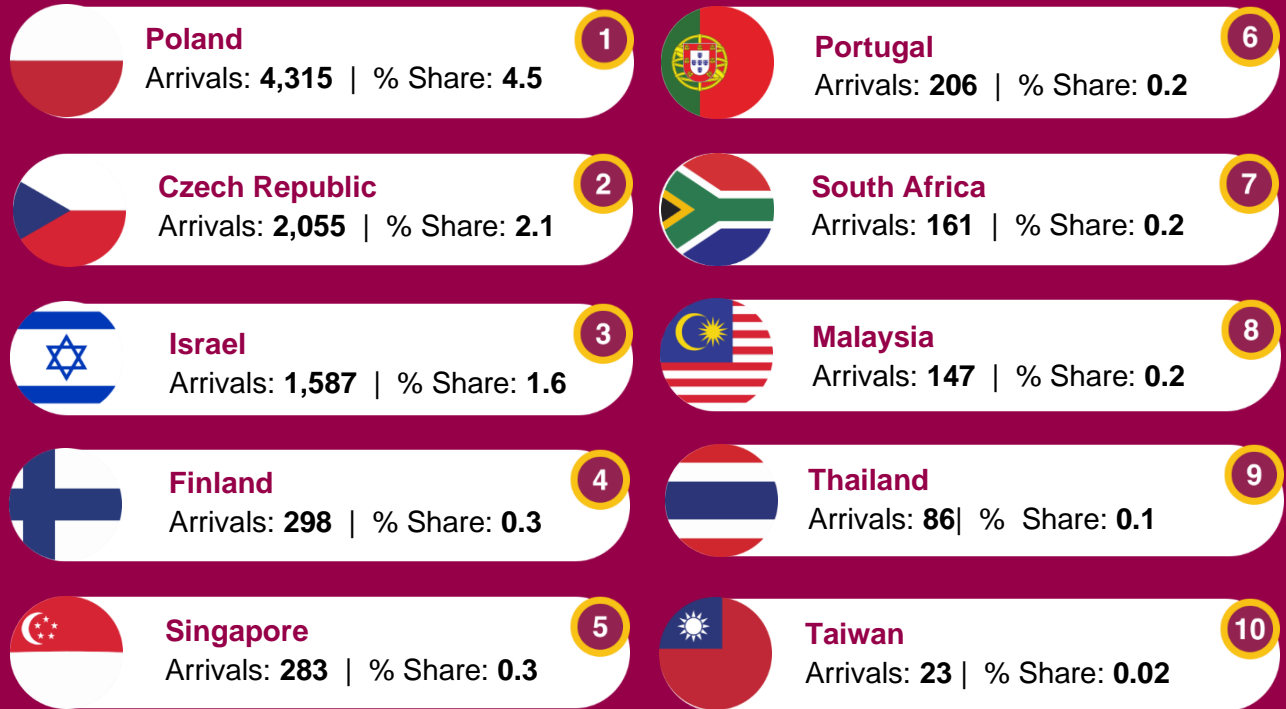


Note: The top primary markets for Sri Lanka have been identified using a combination of historical visitor arrivals data, total outbound market size data, overall size of the economy, recent consumer sentiment data and other variables. The intention is to track these source markets on a go-forward basis to understand future performance for Sri Lanka's tourism economy, including during the projected international tourism recovery period, 2022-2025 (source: Pacific Asia Travel Association, January, 2021).

* A prolonged absence of Ukrainian and Russian tourists is anticipated due to the current conflict and its longterm implications. Accordingly, Russia is unlikely to be a primary market for Sri Lanka from February onwards.



Top Potential markets



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 (source: Pacific Asia Travel Association, January, 2021).



The impact of Ukraine crisis on Sri Lanka Tourism

The travel industry that was battered by COVID 19 and related conditions in the last two years was gradually reinvigorating and was anticipating a boom, when again faced with another shock and uncertainty with the crisis in Ukraine. This will result in serious implications for destinations including Sri Lanka, that rely on Eastern European markets for their inbound tourism.

Russians and Ukrainians are known and valued for their resilient nature in terms of travel behaviour and longer duration of stay. In 2019, Russian travelers have taken more than 40 million trips, becoming one of the fast growing outbound markets as the sixth highest international visitor spending (Grima, 2022). The expenditure per day (non-package excluding air fare) of a Russian tourist in Sri Lanka was about USD 162.94 for the year 2018 while an expenditure per day of USD 164.24 had been recorded for a Ukrainian tourist (The survey on Departing Foreign Tourists, 2018). Ukrainians were the first batch of tourists to arrive in Sri Lanka during the COVID-19 pandemic in December 2020 and Russia was among the top ten source markets of Sri Lanka. According to Forwardkeys, prior to the invasion, Russian outbound flight bookings for March to May had recovered to 32% of pre-pandemic levels, with some holiday hotspots doing exceptionally well. Sri Lanka had occupied the 10th position (with a share of 7%) among the top 20 most booked destinations by Russians for the period of March to May 2022 (Hamdi, 2022). Russian tourist arrivals recorded for the year 2020 and 2021 are 49,397 and 16,894 respectively. While 17,169 and 7,037 Ukrainian tourist arrivals had been recorded for the consecutive years of 2020 and 2021 respectively. This growth momentum continues to 2022, with 28,818 total Russian arrivals and 13,062 Ukrainian arrivals recorded from 1st of January to 28th February, exceeding pre pandemic levels. The tourism reopening time in Sri Lanka in comparison to other similar destinations such as Thailand, promotion initiatives with Russia and initiation of direct flights could be attributed as the main factors behind this growth since October 2021.

Given the importance of especially the Russian market, the implications of this crisis will be far reaching for Sri Lanka tourism especially for a prolonged period of time. As voiced by several major travel agents in Sri Lanka, they are already getting cancellations from Russian tourists and no new bookings had been received. Accordingly, following factors can be pointed out as major impediments in relation to outbound travel and prolonged absence of tourists especially from Russia and Ukraine that in turn will affect Sri Lanka tourism.

- Devaluation of Rouble which has plunged by 30 percent against the Dollar. This will crimp the spending power of Russian travelers.
- The impact of declared sanctions against Russia and the adverse impact on the economy. The West is already pushing international companies to halt sales, cut ties, and dump tens of billions of dollars' worth of investments in Russia.
- The removal of Russia's central bank and other Russian banks from the SWIFT global payments system
- Disrupted flights

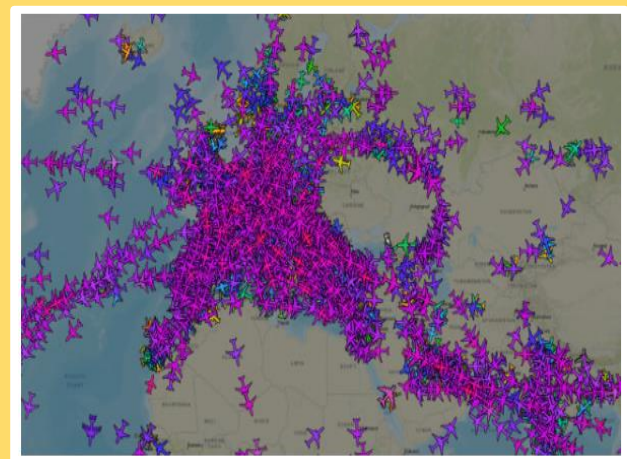
Russia's airspace is the popular overflight for EU flights en route to Asia. As highlighted by Bloomberg and CNN the European Union have closed all airspace across its 27 countries to Russian airplanes by Sunday and Russia has reciprocated with its own bans, causing airlines to fly circuitous intercontinental routes. This will have implications for other European markets as well. European carriers going in the other direction face



delays and higher fuel expense, after Russia, a key pathway to Asia, began blocking access.

Countries such as Turkey, United Kingdom, Japan, Poland have suspended their flights to Russia and Russia has reciprocated with its own bans.

Aeroflot, Rossiya and Pobeda operate a fleet of more than 300 mostly Boeing and Airbus aircraft. Sanctions announced by European Commission, specifically banning the sale of European aircraft to Russia, imperiling further Airbus deliveries to them will have serious implications that will hinder the air connectivity for Russians in the long run. In addition foreign leased aircrafts of Areoflot is to suspend flights of passengers and cargo. Further U.S. sanctions announced by President Joe Biden also include export controls, prohibiting the sale of U.S. technologies that can be used by aerospace companies. This may extend to technologies used in Boeing aircraft (Unnikrishnan, 2022)



Aircraft tracker ADS-B Exchange, February 24th, Empty air space over Ukraine and its border with Russia

Closure of airspace; Source: CNN

- Surge in aviation fuel that will be reflected through the increase in airfares. Oil prices have surged above US\$100 a barrel for the first time in seven years.
- Low travel sentiment owing to above factors and fears of not been able to return.
- Devastating impact of war on the Ukrainian economy, society and its inhabitants will have lasting effects on their lives, making travel a least requirement/priority

The impact on other European source markets of Sri Lanka

- Surge in air fares and longer travel duration due to overflight restrictions
- Due to the economic ties with Eastern Europe, especially Russia, the repercussions of the war will adversely affect the spending power of the travelers
- Air connectivity issues



Accordingly, a protracted absence of Eastern European travellers, especially from Russia and Ukraine is to be anticipated given the nature of crisis in Ukraine and its current and future implications. The market share of Russia and Ukraine out of total arrivals for year 2019 was 6.3 % while the market share for 2021 was 12.2%. Therefore, it is high time to diversify the markets and concentrate on new primary and potential markets with larger economies, large outbound populations and high yield.

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Top ten source markets

February 2022

The Russian Federation, India, the United Kingdom, Germany and France were Sri Lanka's top five international tourist generating markets for the month of February this year. Russia was the largest source of tourist visits to Sri Lanka with 16% of the total traffic received in February. An analysis of Russian arrivals in the consecutive years reveals that it has almost exceeded the pre pandemic levels and reached an increase of more than a two fold as compared to February 2019. This could be likely due to increased interest by Russian tour operators in alternative destinations to Thailand and Goa with strict public health measures in place and the launching of direct flights to Russia. According to Forwardkeys, Sri Lanka had occupied the 10th position (with a share of 7%) among the top 20 most

booked destinations by Russians for the period of March to May 2022. However, the continuity of this growth momentum could be stalled for a prolonged period of time due to the current crisis in Ukraine. India and the United Kingdom accounted for 13% and 11% of the total traffic respectively. The on arrival visa facility introduced for the Indian tourists could have partly contributed for the increased arrivals from India. The growth in arrivals from countries in the Asia and Pacific, Western, Central & Eastern Europe, suggests a revitalization of leisure tourism, potentially enabled by factors such as the gradual improvement of traveller confidence, the lifting of travel restrictions, the gradual shrinking cases of Omicron variant and the gradual containment of the pandemic in Sri Lanka.

Chart 1. Top ten source markets to Sri Lanka, February 2022

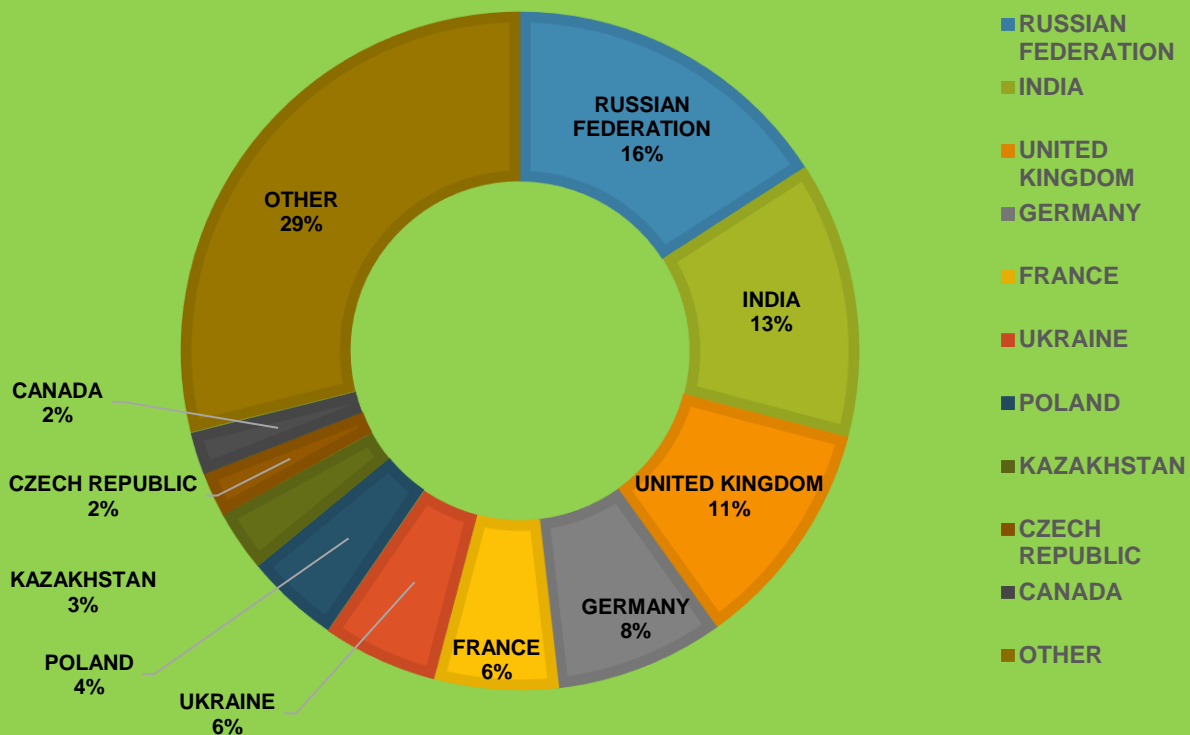
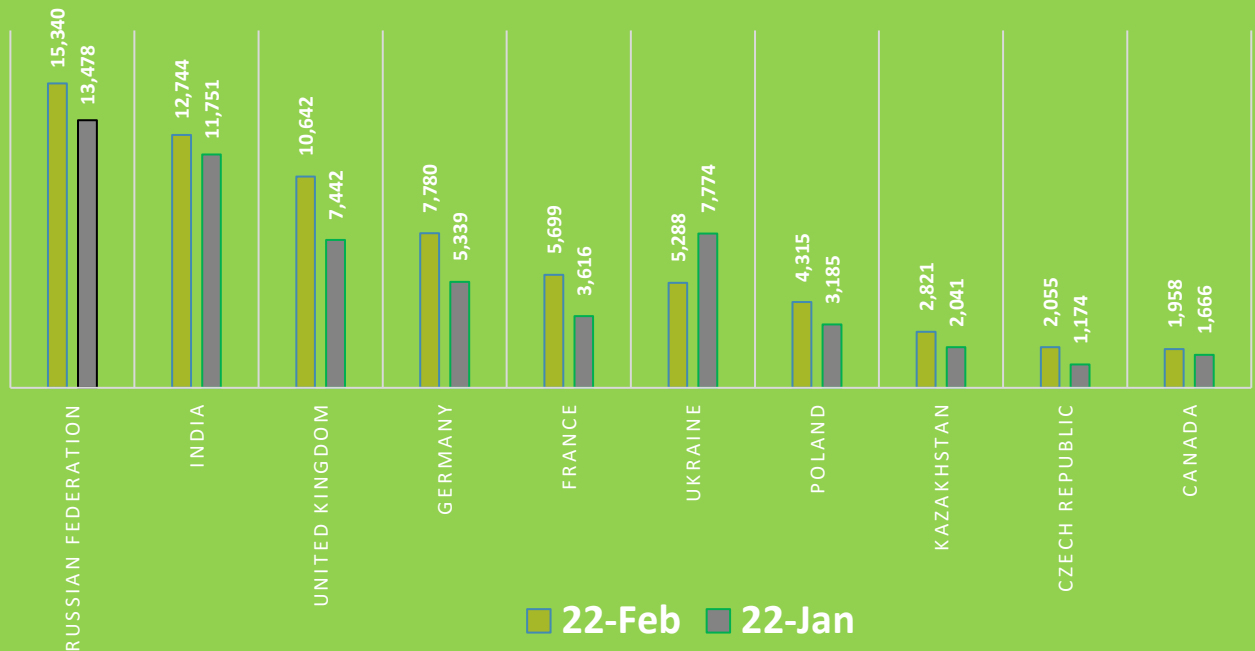




Table 2. Top ten source markets to Sri Lanka, February 2022

Rank	Country of Residence	Tourist Arrivals (February 2022)			Tourist Arrivals (February 2021)
		By Air	By Sea	Total	
1	Russian Federation	15,340	-	15,340	119
2	India	12,744	-	12,744	79
3	United Kingdom	10,642	-	10,642	79
4	Germany	7,780	-	7,780	245
5	France	5,699	-	5,699	40
6	Ukraine	5,288	-	5,288	845
7	Poland	4,315	-	4,315	11
8	Kazakhstan	2,821	-	2,821	1,231
9	Czech Republic	2,055	-	2,055	17
10	Canada	1,958	-	1,958	71

Chart 2. Comparison of arrivals from top ten markets to Sri Lanka, Feb 2022/ Jan 2021



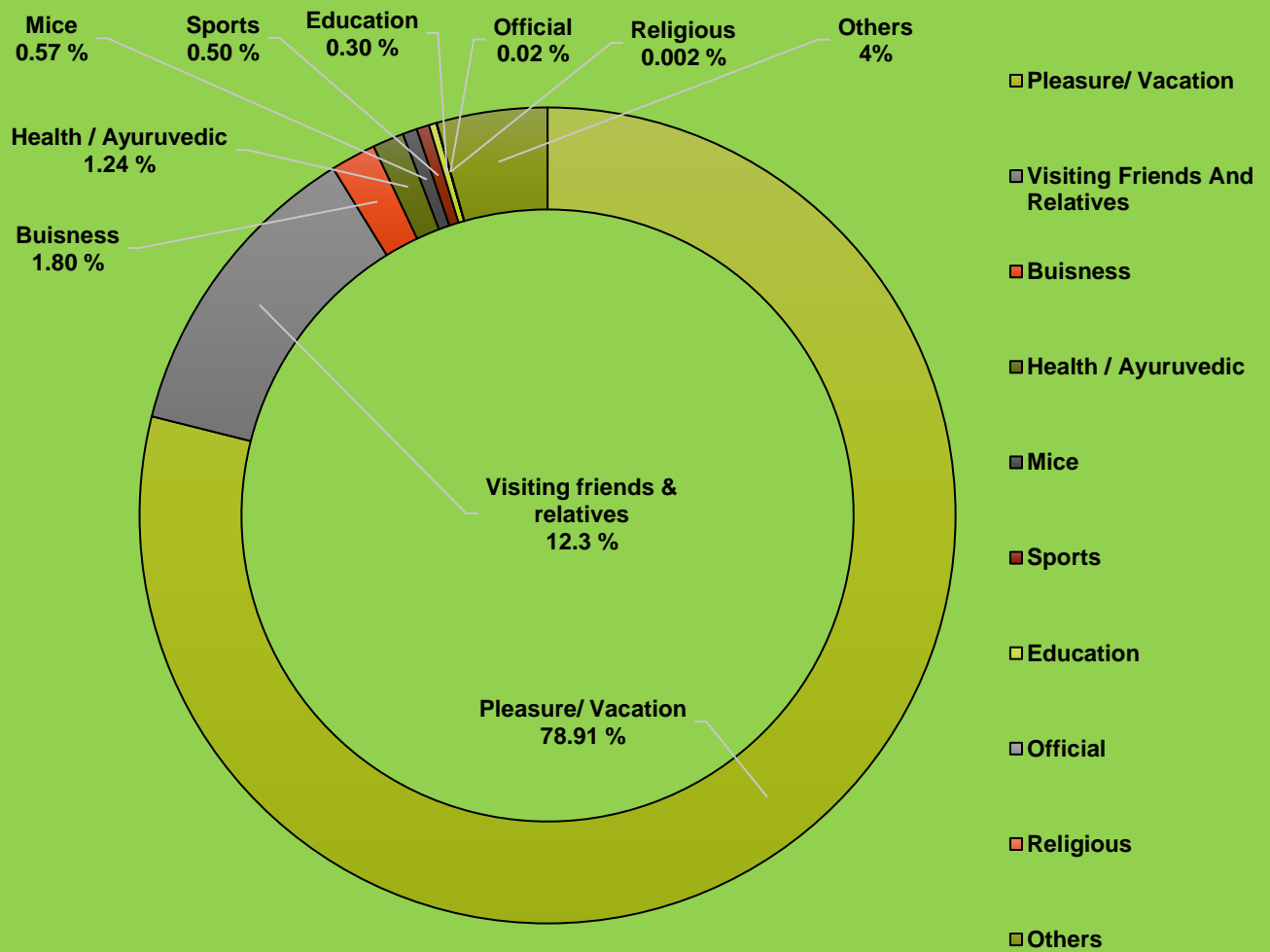


Tourist arrivals by purpose of visit

February 2022

An analysis of tourist arrivals by purpose of visit reveals that a majority (79%) of tourists had visited Sri Lanka for pleasure/vacation, while for 12% of tourists the main purpose was visiting friends and relatives. Only 2% of tourists had visited for business related purposes. 1.2% had visited for health related purposes, while 0.8% had visited for purposes such as sports and education.

Chart 3. Tourist arrivals by purpose of visit, February 2022





International tourist arrivals by country of residence

	February			Tourist Arrivals February 2021	% Change February (22/21)	Total Tourist Arrivals up to February 2022	Total Tourist Arrivals up to February 2021	% Change up to February (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
AMERICAS	4,027	0	4,027	159	-	7,718	186	-
North America	3,846	0	3,846	149	-	7,362	176	-
Canada	1,958	0	1,958	71	-	3,624	88	-
Mexico	33	0	33	3	-	54	3	-
United States	1,855	0	1,855	75	-	3,684	85	-
Carribbean & Central America	40	0	40	4	-	64	4	-
Costa Rica	11	0	11	-	-	15	-	-
Jamaica	0	0	0	-	-	2	-	-
Others	29	0	29	4	-	47	4	-
South America	141	0	141	6	-	292	6	-
Argentina	25	0	25	-	-	54	-	-
Brazil	48	0	48	3	-	97	3	-
Chile	14	0	14	1	-	43	1	-
Colombia	28	0	28	2	-	48	2	-
Others	26	0	26	-	-	50	-	-
AFRICA	539	0	539	6	-	959	6	-
North Africa	272	0	272	2	-	484	2	-
Morocco	61	0	61	1	-	90	1	-
Sudan	151	0	151	1	-	298	1	-
Others	60	0	60	-	-	96	-	-
Sub-Saharan Africa	267	0	267	4	-	475	4	-
Kenya	19	0	19	-	-	38	-	-
Mauritius	14	0	14	1	-	21	1	-
Nigeria	3	0	3	-	-	8	-	-
South Africa	161	0	161	1	-	234	1	-
Others	70	0	70	2	-	174	2	-



	February			Tourist Arrivals February 2021	% Change February (22/21)	Total Tourist Arrivals up to February 2022	Total Tourist Arrivals up to February 2021	% Change up to February (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	18,862	0	18,862	301	-	38,393	381	-
North East Asia	550	0	550	131	-	999	159	-
China	266	0	266	117	-	492	144	-
Japan	122	0	122	9	-	214	10	-
South Korea	117	0	117	5	-	221	5	-
Taiwan	23	0	23	-	-	36	-	-
Others	22	0	22	-	-	36	-	-
South East Asia	850	0	850	29	-	1,550	41	-
Cambodia	22	0	22	-	-	43	-	-
Indonesia	81	0	81	5	-	156	8	-
Malaysia	147	0	147	3	-	306	4	-
Myanmar	23	0	23	4	-	39	5	-
Philippines	157	0	157	15	-	266	21	-
Singapore	283	0	283	-	-	512	1	-
Thailand	86	0	86	2	-	158	2	-
Vietnam	40	0	40	-	-	57	-	-
Others	11	0	11	-	-	13	-	-
Oceania	1,823	0	1,823	29	-	4,751	35	-
Australia	1,688	0	1,688	24	-	4,502	27	-
New Zealand	131	0	131	5	-	243	8	-
Others	4	0	4	-	-	6	-	-
South Asia	15,639	0	15,639	112	-	31,093	146	-
Afghanistan	2	0	2	-	-	2	-	-
Bangladesh	259	0	259	6	-	561	6	-
Bhutan	11	0	11	-	-	41	-	-
India	12,744	0	12,744	79	-	24,495	96	-
Iran	303	0	303	-	-	563	-	-
Maldives	1,532	0	1,532	13	-	3,933	30	-
Nepal	97	0	97	1	-	197	1	-
Pakistan	691	0	691	13	-	1,301	13	-
EUROPE	70,696	0	70,696	2,886	-	127,301	4,461	-
Northern Europe	13,967	0	13,967	133	-	24,135	136	-
Denmark	1,217	0	1,217	11	-	2,230	11	-
Finland	298	0	298	2	-	569	2	-
Norway	595	0	595	14	-	1,116	14	-
Sweden	818	0	818	9	-	1,501	9	-
United Kingdom	10,642	0	10,642	79	-	18,084	82	-
Others	397	0	397	18	-	635	18	-



	February			Tourist Arrivals February 2021	% Change February (22/21)	Total Tourist Arrivals up to February 2022	Total Tourist Arrivals up to February 2021	% Change up to February (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
Western Europe	17,915	0	17,915	367	-	30,493	416	-
Austria	1,054	0	1,054	19	-	1,842	24	-
Belgium	620	0	620	7	-	1,115	7	-
France	5,699	0	5,699	40	-	9,315	44	-
Germany	7,780	0	7,780	245	-	13,119	264	-
Netherlands	1,232	0	1,232	21	-	2,373	39	-
Switzerland	1,495	0	1,495	33	-	2,681	36	-
Others	35	0	35	2	-	48	2	-
Central/ Eastern Europe	34,950	0	34,950	2327	-	66,234	3,847	-
Belarus	823	0	823	44	-	1,559	74	-
Czech Republic	2,055	0	2,055	17	-	3,229	17	-
Estonia	285	0	285	3	-	470	3	-
Hungary	502	0	502	6	-	927	6	-
Kazakhstan	2,821	0	2,821	1,231	-	4,862	1,232	-
Lithuania	555	0	555	5	-	907	5	-
Poland	4,315	0	4,315	11	-	7,500	11	-
Romania	776	0	776	2	-	1,304	2	-
Russia	15,340	0	15,340	119	-	28,818	139	-
Slovakia	515	0	515	14	-	878	14	-
Ukraine	5,288	0	5,288	845	-	13,062	2,305	-
Others	1,675	0	1,675	30	-	2,718	39	-
Southern/ Mediterranean Europe	3,864	0	3,864	59	-	6,439	62	-
Greece	150	0	150	1	-	228	1	-
Italy	553	0	553	23	-	1,056	25	-
Portugal	206	0	206	4	-	363	4	-
Spain	744	0	744	18	-	1,341	18	-
Turkey	166	0	166	3	-	340	4	-
Israel	1,587	0	1,587	1	-	2,294	1	-
Others	458	0	458	9	-	817	9	-
MIDDLE EAST	2,383	0	2,383	14	-	4,463	14	-
Bahrain	49	0	49	-	-	108	-	-
Egypt	453	0	453	3	-	670	3	-
Iraq	171	0	171	-	-	243	-	-
Jordan	230	0	230	4	-	454	4	-
Kuwait	204	0	204	-	-	240	-	-
Lebanon	153	0	153	6	-	240	6	-
Oman	127	0	127	-	-	228	-	-
Qatar	17	0	17	1	-	21	1	-
Saudi Arabia	861	0	861	-	-	2,028	-	-
United Arab Emirates	53	0	53	-	-	117	-	-
Others	65	0	65	-	-	114	-	-
TOTAL	96,507	0	96,507	3,366	-	178,834	5,048	-



Main last departure airports and airlines to Sri Lanka February 2022

An analysis of the last departure airports to Sri Lanka reveals the vital importance of air connectivity in the tourism industry. As depicted in the below Chart 4, for around 54% of tourists the last airports had been Dubai, Doha and Chennai. Further, in terms of airlines, Sri Lankan Airlines, Emirates and Qatar Airways were the top airlines, handling 58% of tourists to Sri Lanka.

Chart 4. Main last departure airports to Sri Lanka, February 2022

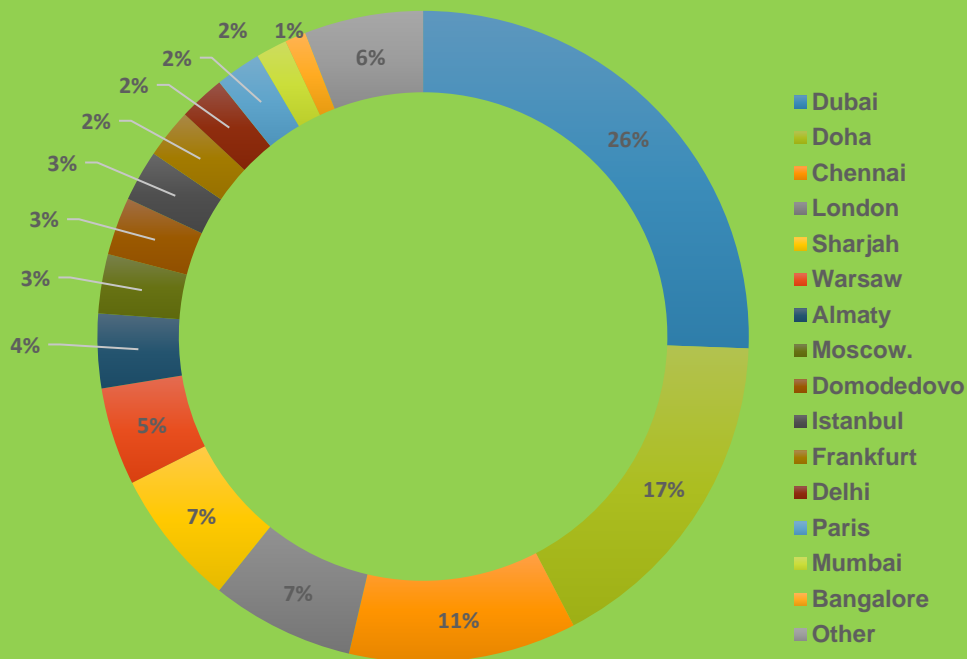
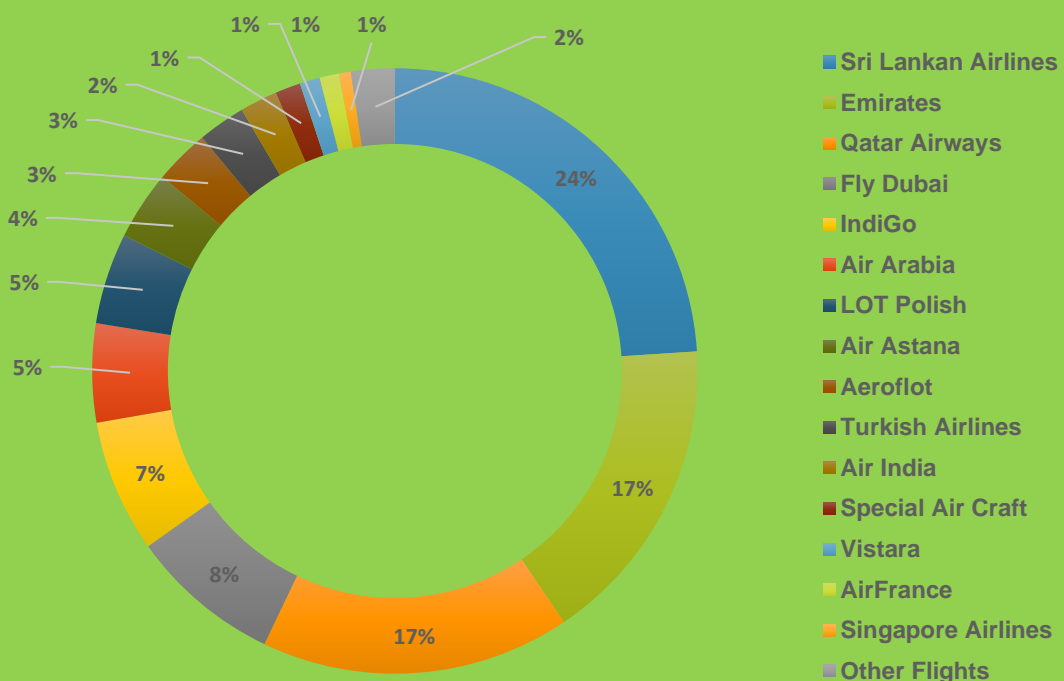


Chart 5. Main airlines to Sri Lanka, February 2022





Top ten markets versus main last departure airports and main airlines to Sri Lanka February 2022

The below tables depict the main last departure airports and airlines analyzed by top markets to Sri Lanka. Emirates and Fly Dubai are the most popular airlines for Russians. It is noteworthy that Air Astana has been patronised by 86.5% of tourists from Kazakhstan while LOT Polish has been patronised by 63.3% of tourists from Poland thus highlighting the importance of destination accessibility in driving visitation. Sri Lankan Airlines and IndiGo are the most preferred airlines for Indians in travelling to Sri Lanka. For majority of travellers from Germany, the United Kingdom and France, Qatar Airways is the most preferable airline and Doha is the main last departure airport.

Table 4. Top ten markets vs. main last departure airports to Sri Lanka, February 2022

Country	Number of passengers																				
	Dubai	Doha	Chennai	London	Sharjah	Warsaw	Almaty	Moscow	Domodedovo	Istanbul	Frankfurt	Delhi	Paris	Mumbai	Bangalore	Hyderabad	Singapore	Male	Bangkok	Abu Dhabi	Other
Russian Federation	7,346	1,100	59	12	2,056	17	67	2,003	1,965	422	12	21	4	2	2	0	14	69	23	23	123
India	380	127	7,503	13	14	4	0	1	0	3	3	1,487	0	1,020	677	511	60	45	6	16	874
United Kingdom	2,282	2,928	53	4,417	8	29	2	0	0	62	5	15	36	18	16	2	138	99	92	66	374
Germany	2,401	2,875	31	87	21	175	7	2	1	159	1,425	3	80	2	8	1	84	39	92	17	270
France	1,303	2,286	42	104	6	29	0	0	1	123	30	15	1,366	6	8	2	139	35	60	21	123
Ukraine	667	707	12	2	2,547	136	11	5	4	920	10	2	4	0	2	1	1	20	14	16	207
Poland	1,039	374	7	18	2	2,730	1	0	0	11	15	17	0	0	0	0	25	25	9	7	35
Kazakhstan	303	7	5	0	12	1	2,440	4	4	15	0	7	0	0	0	0	1	3	0	2	17
Czech Republic	1,300	290	5	38	9	206	0	4	0	17	139	0	13	0	0	0	12	2	3	4	13
Canada	538	821	42	193	0	11	1	0	0	14	42	13	58	13	2	2	28	6	11	63	100

Table 5. Top ten markets vs. main airlines to Sri Lanka, February 2022

Country	Percentage share of the airline																					
	Sri Lankan Airlines	Emirates	Qatar Airways	Fly Dubai	IndiGo	Air Arabia	LOT Polish	Air Astana	Aeroflot	Turkish Airlines	Air India	Special Air Craft	Vistara	AirFrance	Singapore Airlines	SpiceJet	Air Asia Philippines	Gulf Air	Oman Air	Etihad Airways	Other Flights	Total
Russian Federation	14.5	25.8	7.1	21.6	0.2	13.4	0.1	0.4	13.1	2.8	0.1	0.1	0.1	0.0	0.1	0.1	0.0	0.4	0.1	0.1	0.1	15,340
India	40.1	2.0	0.6	0.3	37.0	0.1	0.0	0.0	0.0	0.0	10.5	0.0	5.5	0.0	0.5	2.8	0.0	0.1	0.2	0.1	0.2	12,744
United Kingdom	47.2	19.0	26.8	1.8	0.3	0.1	0.3	0.0	0.0	0.6	0.0	0.0	0.1	0.3	1.2	0.0	0.0	1.6	0.1	0.4	0.2	10,642
Germany	23.7	28.5	35.8	2.1	0.3	0.3	2.2	0.1	0.0	2.1	0.0	0.0	0.0	0.8	1.0	0.0	0.0	0.7	1.0	0.2	1.1	7,780
France	20.1	19.7	39.6	2.9	0.5	0.1	0.5	0.0	0.0	2.2	0.1	0.0	0.1	10.6	1.9	0.1	0.0	0.1	1.0	0.2	0.4	5,699
Ukraine	1.5	1.4	14.4	9.9	0.2	28.2	2.6	0.2	0.1	17.4	0.0	17.1	0.0	0.1	0.1	0.0	6.3	0.1	0.1	0.2	0.1	5,288
Poland	2.9	12.9	9.7	10.0	0.2	0.0	63.3	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.3	0.2	0.3	4,315
Kazakhstan	2.6	1.0	0.2	7.9	0.1	0.4	0.0	86.5	0.1	0.5	0.0	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2,821
Czech Republic	9.7	38.8	14.7	23.5	0.1	0.4	10.0	0.0	0.2	0.8	0.1	0.0	0.0	0.4	0.4	0.0	0.0	0.0	0.4	0.1	0.2	2,055
Canada	32.4	18.8	40.2	0.7	0.7	0.0	0.6	0.1	0.0	0.7	0.4	0.1	0.2	0.4	1.5	0.2	0.0	0.3	0.2	1.9	0.8	1,958



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