



Monthly Tourist Arrivals Report:

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

March 2022

Sri Lanka Tourism Development Authority



Introduction

The following document provides a synthesis of the most recent March , 2022 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st March 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

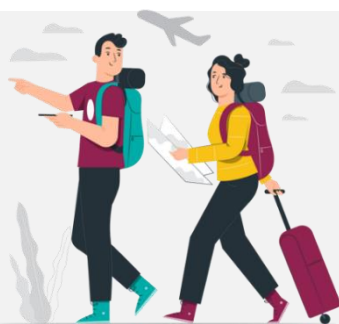
The total number of international tourist arrivals to Sri Lanka during March 2022 was 106,500. This significant rebound during the month of March follows the sharp contraction in arrivals after the month of April, 2021. This reflects the improvement in international arrivals potentially owing to factors such as vaccination advances around the world, easing or lifting of travel restrictions and

growing consumer confidence in some outbound source markets.

As of 31st March 2022, 285,334 international tourists had visited Sri Lanka for this year. The largest source markets recorded for the month of March were India, the United Kingdom, Germany, followed by Russia Federation and France.

Table 1. Monthly tourist arrivals, March 2022

Month	2018	2021	2022	% change 2022/21	% change 2022/18
January	238,924	1,682	82,327	4,794.6	(65.5)
February	235,618	3,366	96,507	2,767.1	(59.0)
March	233,282	4,581	106,500	2,224.8	(54.3)
April	180,429	4,168	-	-	
May	129,466	1,497	-	-	
June	146,828	1,614	-	-	
July	217,829	2,429	-	-	
August	200,359	5,040	-	-	
September	149,087	13,547	-	-	
October	153,123	22,771	-	-	
November	195,582	44,294	-	-	
December	253,169	89,506	-	-	
TOTAL	2,333,796	194,495	285,334	-	



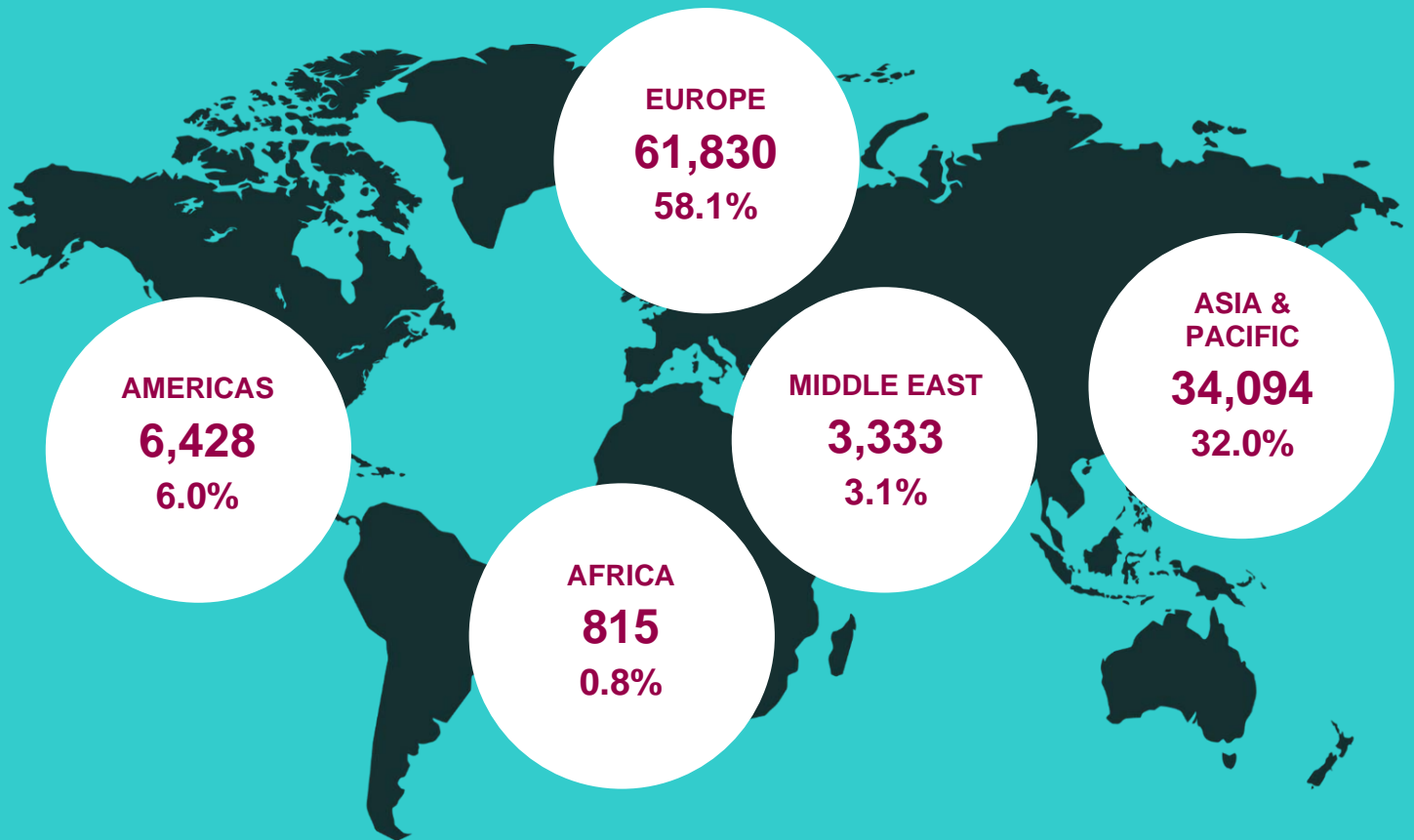
Tourist Arrivals | March 2022

106,500



Tourist arrivals by region and percentage share March 2022

Map 1. Tourist arrivals by region and percentage share



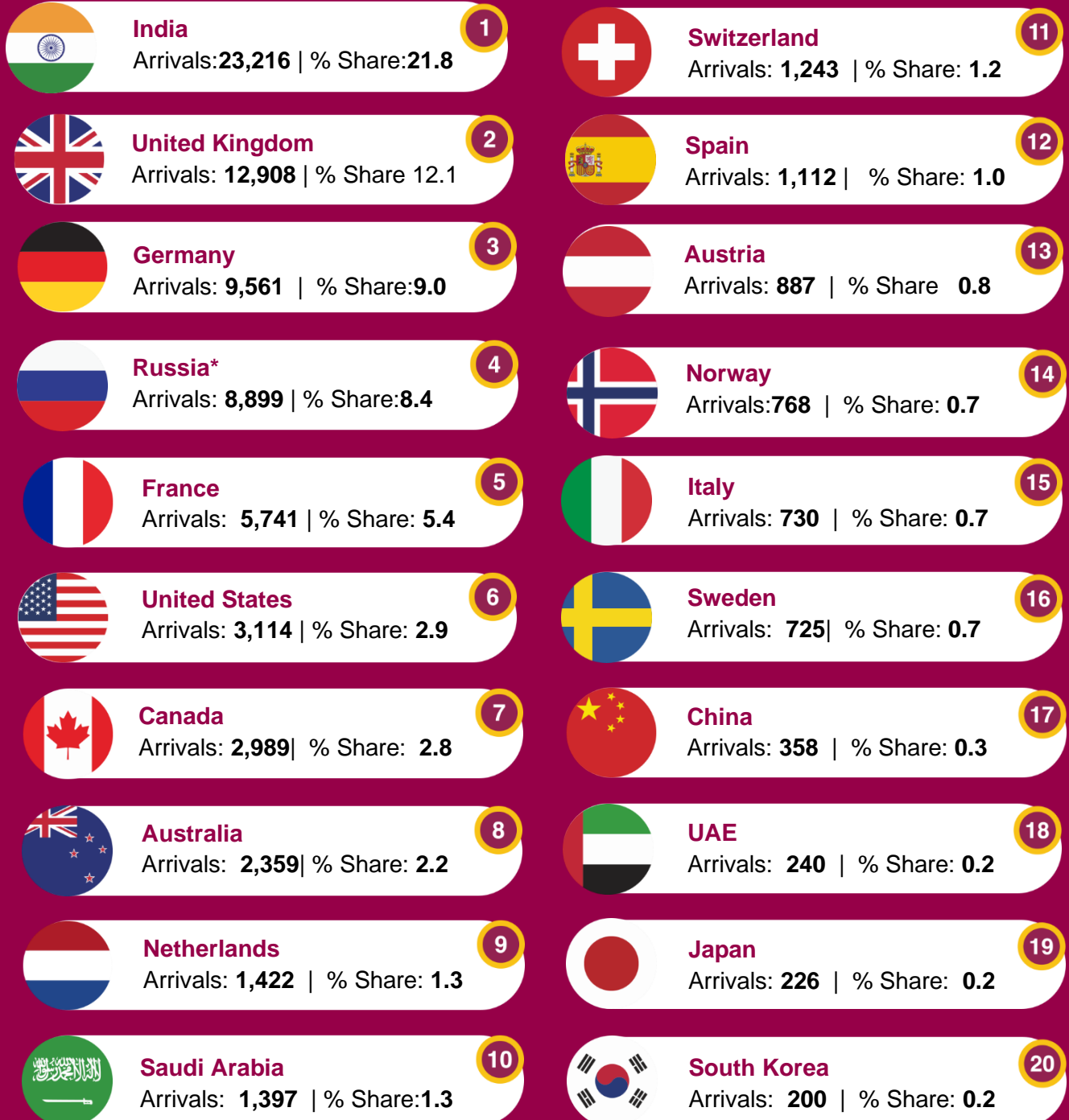
Europe became the largest source of tourist traffic to Sri Lanka with 58.1% of the total traffic received in March 2022. Pent up demand especially from countries such as India, the United Kingdom, Germany and France is likely to have driven this growth momentum. Asia and the Pacific accounted for 32% of total arrivals. The Middle East accounted for 3.1% of the total traffic while the Americas accounted for 6%.

The gradual improvement in international travel was once again threatened by the Russian invasion of Ukraine coupled with related challenging economic environment, undermining consumer confidence which was gradually building up. The Eastern European market, especially Russia and Ukraine which gained a significant weight since the early January 2021 is gradually waning while the Asia and Pacific is gaining momentum.



Top primary markets and top potential markets March 2022

Top primary markets

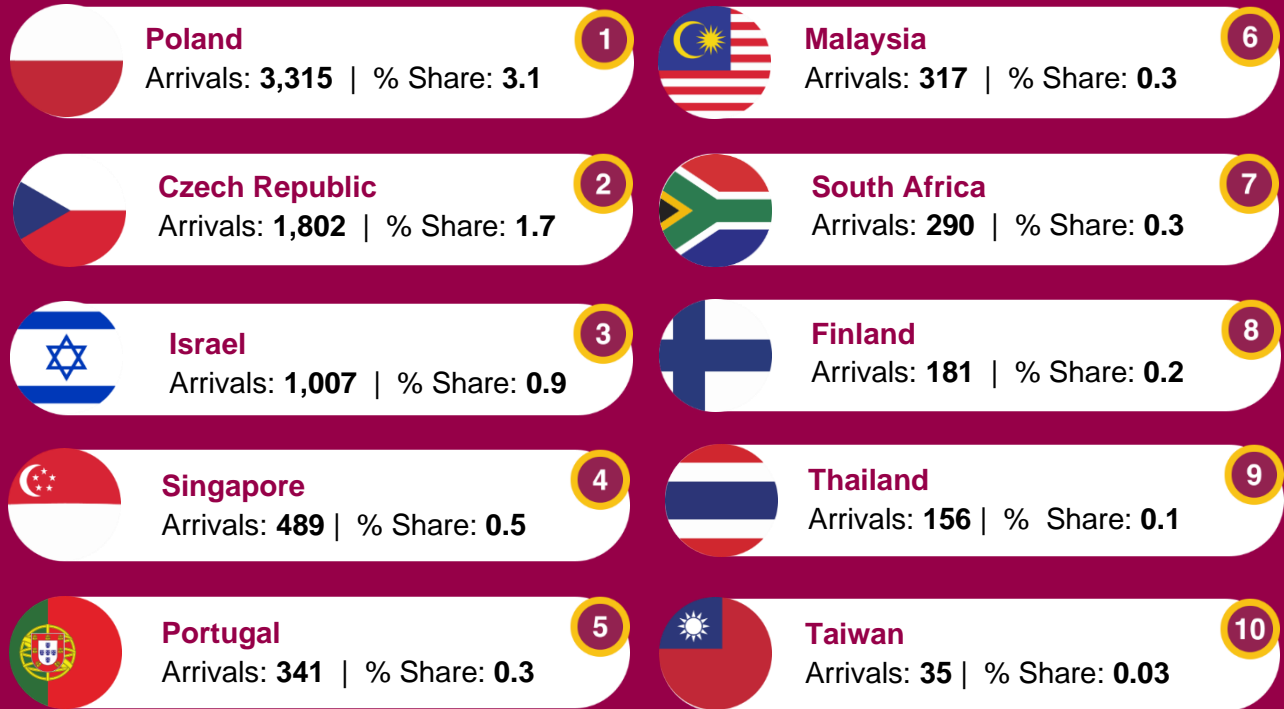


Note: The top primary markets for Sri Lanka have been identified using a combination of historical visitor arrivals data, total outbound market size data, overall size of the economy, recent consumer sentiment data and other variables. The intention is to track these source markets on a go-forward basis 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).



Top ten source markets

March 2022

India, the United Kingdom, Germany, Russian Federation and France were Sri Lanka's top five international tourist generating markets for the month of March this year. India was the largest source of tourist visits to Sri Lanka with 22% of the total traffic received in March. The on arrival visa facility introduced for the Indian tourists could have partly contributed for the increased arrivals from India. The United Kingdom and Germany accounted for 12% and 9% of the total traffic while Russia and France accounted for 8% & 5% respectively. The gradual declining of Russian tourists arrivals is noteworthy

mainly due to the ongoing war coupled with related socio economic conditions. Further, the cessation of direct flights between Russia and Sri Lanka could have further dampen the arrival numbers. 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, March 2022

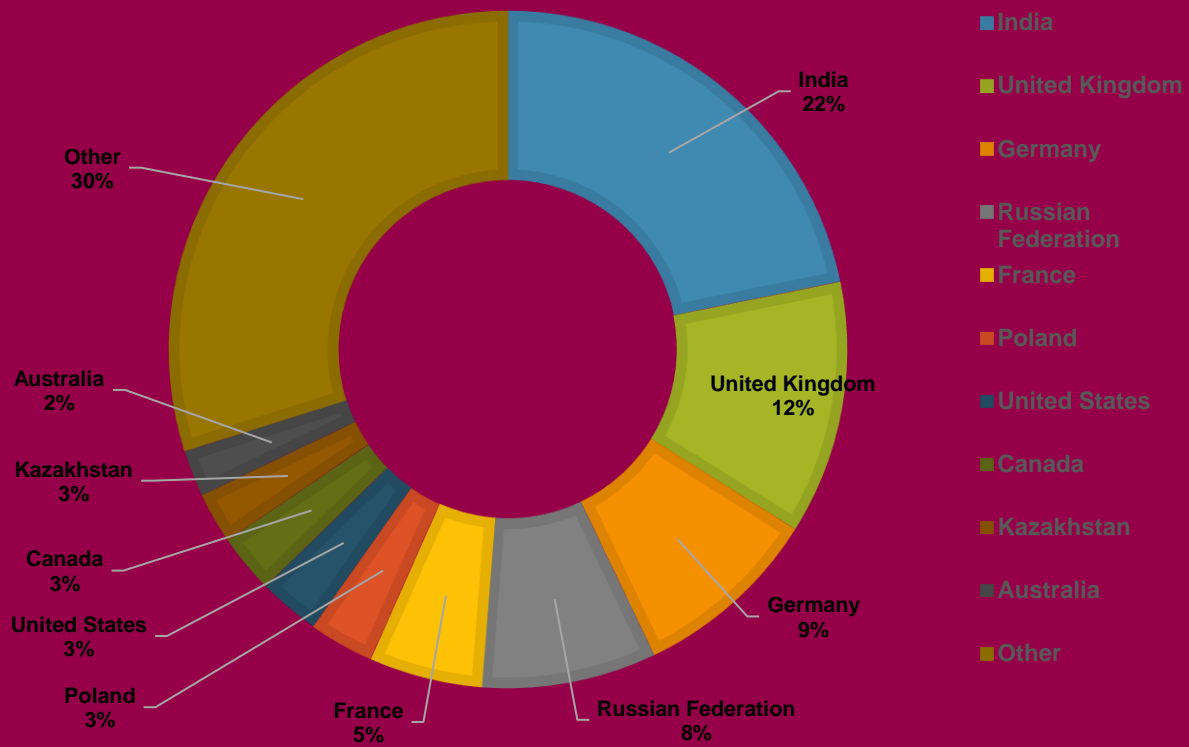




Table 2. Top ten source markets to Sri Lanka, March 2022

Rank	Country of Residence	Tourist Arrivals (March 2022)			Tourist Arrivals (March 2021)
		By Air	By Sea	Total	
1	India	23,216	-	23,216	183
2	United Kingdom	12,908	-	12,908	316
3	Germany	9,561	-	9,561	502
4	Russian Federation	8,899	-	8,899	197
5	France	5,741	-	5,741	72
6	Poland	3,315	-	3,315	45
7	United States	3,114	-	3,114	182
8	Canada	2,989	-	2,989	120
9	Kazakhstan	2,598	-	2,598	1,514
10	Australia	2,359	-	2,359	29

Top ten source markets January - March 2022

India, Russian Federation, the United Kingdom, Germany and France were Sri Lanka's top five international tourist-generating markets from January to March this year. It is noteworthy that Poland has recorded the highest growth in comparison to January to March 2021.

Table 3. Top ten markets to Sri Lanka, January to March 2021 & 2022 and percentage change

Rank	Country of Residence	Tourist Arrivals (Jan ~ March 2022)	Tourist Arrivals (Jan ~ March 2021)	% Change (Jan - Mar 2022 & Jan - Mar 2021)
1	India	47,711	279	17,000.70
2	Russian Federation	37,717	336	11,125.30
3	United Kingdom	30,992	398	7,686.90
4	Germany	22,680	766	2,860.80
5	France	15,056	116	12,879.30
6	Ukraine	13,463	2,592	419.4
7	Poland	10,815	56	19,212.50
8	Kazakhstan	7,460	2,746	171.7
9	Australia	6,861	56	12,151.80
10	United States	6,798	267	2,446.10
11	Other	85,781	2,017	4,152.90
Total		285,334	9,629	2,863.30



Chart 2. Top ten source markets to Sri Lanka, January – March, 2022

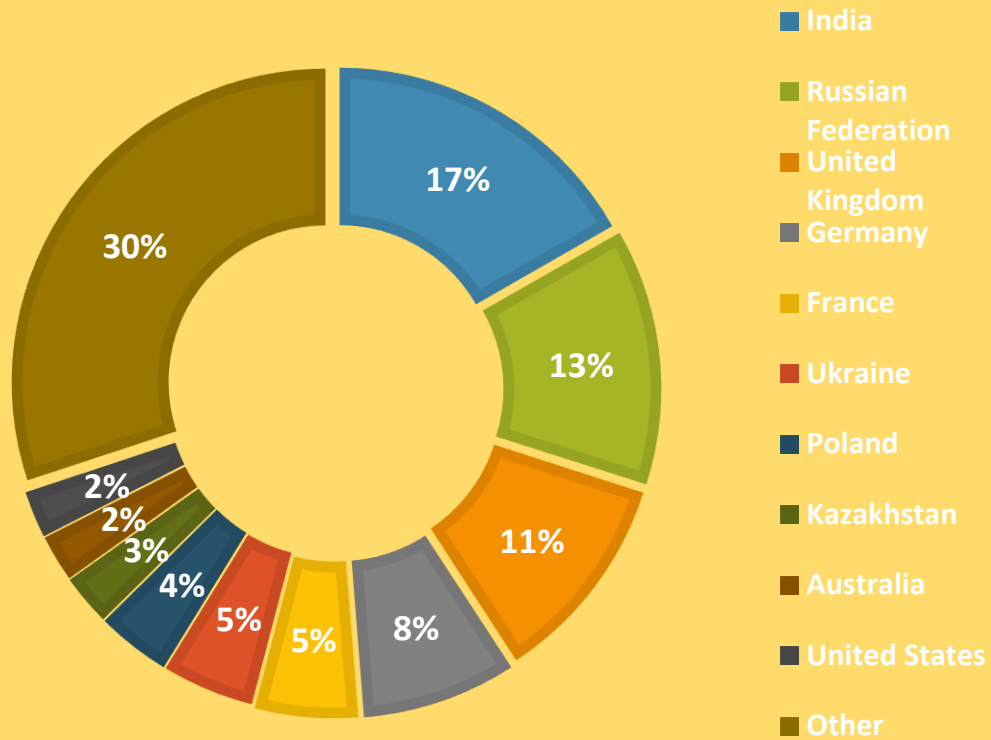
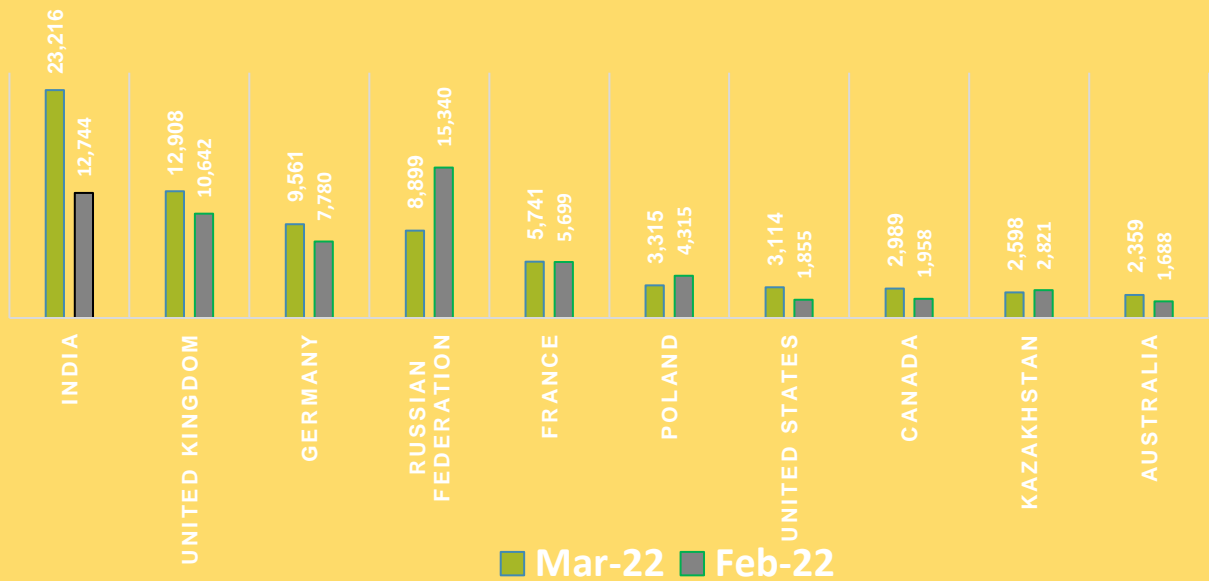


Chart 3. Comparison of arrivals from top ten markets to Sri Lanka, March 2022/ Feb 2022



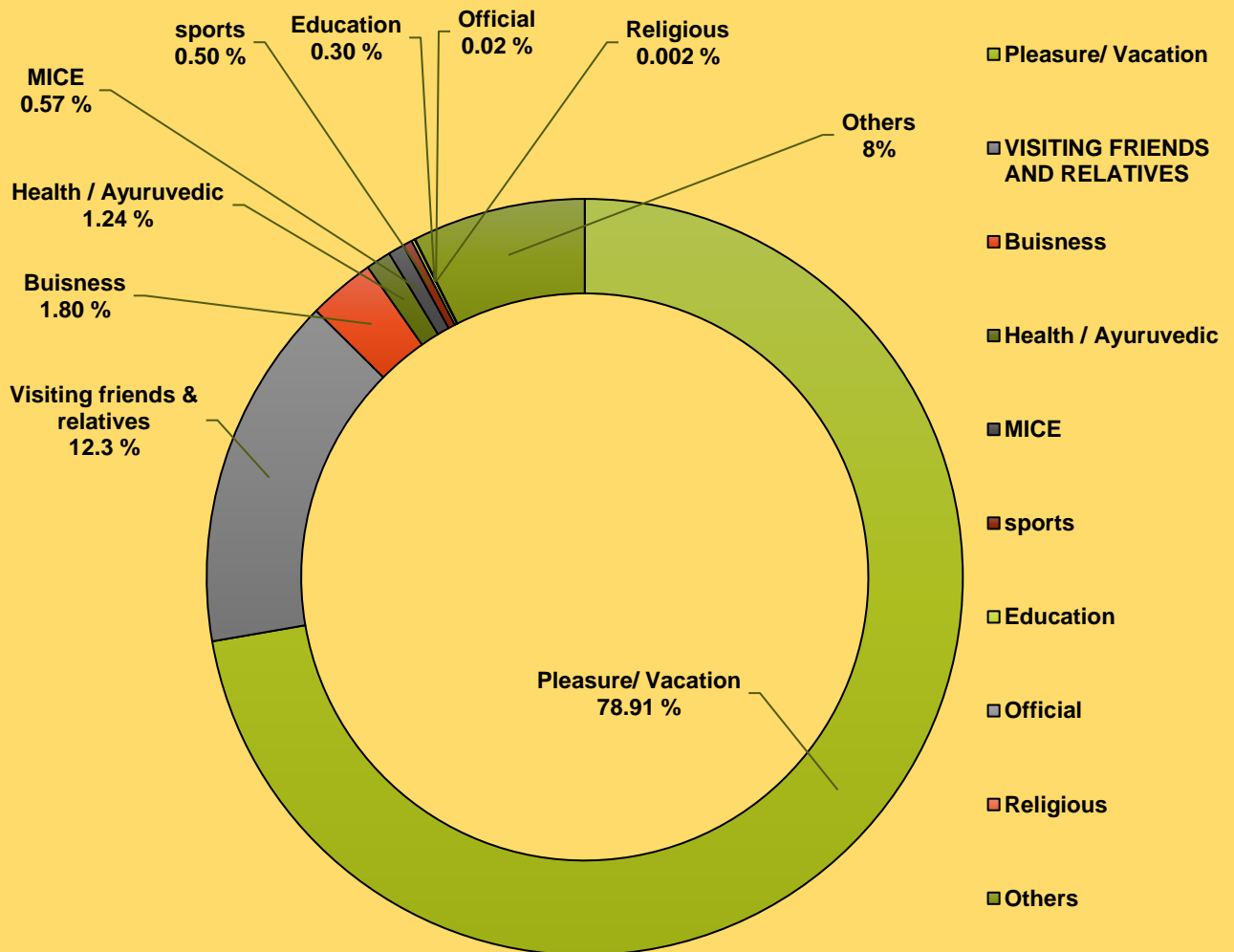


Tourist arrivals by purpose of visit

March 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 1.8% 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 4. Tourist arrivals by purpose of visit, March 2022





International tourist arrivals by country of residence

	March 2022			Tourist Arrivals March 2021	% Change March (22/21)	Total Tourist Arrivals up to March 2022	Total Tourist Arrivals up to March 2021	% Change up to March (20/21)
	By Air	By Sea	Total					
AMERICAS	6,428	-	6,428	316	-	14,146	502	-
North America	6,146	-	6,146	304	-	13,508	480	-
Canada	2,989	-	2,989	120	-	6,613	208	-
Mexico	43	-	43	2	-	97	5	-
United States	3,114	-	3,114	182	-	6,798	267	-
Carribbean & Central America	39	-	39	3	-	103	7	-
Costa Rica	7	-	7	-	-	22	-	-
Jamaica	4	-	4	1	-	6	1	-
Others	28	-	28	2	-	75	6	-
South America	243	-	243	9	-	535	15	-
Argentina	38	-	38	-	-	92	-	-
Brazil	87	-	87	3	-	184	6	-
Chile	30	-	30	-	-	73	1	-
Colombia	40	-	40	3	-	88	5	-
Others	48	-	48	3	-	98	3	-
AFRICA	796	-	796	29	-	1,755	35	-
North Africa	371	-	371	-	-	855	2	-
Morocco	90	-	90	-	-	180	1	-
Sudan	156	-	156	-	-	454	1	-
Others	125	-	125	-	-	221	-	-
Sub-Saharan Africa	425	-	425	29	-	900	33	-
Kenya	42	-	42	1	-	80	1	-
Mauritius	9	-	9	2	-	30	3	-
Nigeria	3	-	3	-	-	11	-	-
South Africa	290	-	290	23	-	524	24	-
Others	81	-	81	3	-	255	5	-



	March 2022			Tourist Arrivals March 2021	% Change March (22/21)	Total Tourist Arrivals up to March 2022	Total Tourist Arrivals up to March 2021	% Change up to March (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	34,113	-	34,113	639	-	72,506	1,020	-
North East Asia	819	-	819	245	-	1,818	404	-
China	358	-	358	223	-	850	367	-
Japan	226	-	226	12	-	440	22	-
South Korea	200	-	200	7	-	421	12	-
Taiwan	35	-	35	3	-	71	3	-
Others	-	-	-	-	-	36	-	-
South East Asia	1,402	-	1,402	31	-	2,952	72	-
Cambodia	2	-	2	1	-	45	1	-
Indonesia	112	-	112	3	-	268	11	-
Malaysia	317	-	317	3	-	623	7	-
Myanmar	19	-	19	1	-	58	6	-
Philippines	256	-	256	8	-	522	29	-
Singapore	489	-	489	4	-	1,001	5	-
Thailand	156	-	156	6	-	314	8	-
Vietnam	46	-	46	5	-	103	5	-
Others	5	-	5	-	-	18	-	-
Oceania	2,616	-	2,616	36	-	7,367	71	-
Australia	2,359	-	2,359	29	-	6,861	56	-
New Zealand	246	-	246	7	-	489	15	-
Others	11	-	11	-	-	17	-	-
South Asia	29,276	-	29,276	327	-	60,369	473	-
Afghanistan	16	-	16	1	-	18	1	-
Bangladesh	451	-	451	3	-	1,012	9	-
Bhutan	6	-	6	1	-	47	1	-
India	23,216	-	23,216	183	-	47,711	279	-
Iran	2,235	-	2,235	65	-	2,798	65	-
Maldives	1,910	-	1,910	56	-	5,843	86	-
Nepal	186	-	186	1	-	383	2	-
Pakistan	1,256	-	1,256	17	-	2,557	30	-
EUROPE	61,830	-	61,830	3,484	-	189,131	7,945	-
Northern Europe	16,533	-	16,533	403	-	40,668	539	-
Denmark	1,187	-	1,187	21	-	3,417	32	-
Finland	181	-	181	7	-	750	9	-
Norway	768	-	768	21	-	1,884	35	-
Sweden	725	-	725	22	-	2,226	31	-
United Kingdom	12,908	-	12,908	316	-	30,992	398	-
Others	764	-	764	16	-	1,399	34	-



	March 2022			Tourist Arrivals March 2021	% Change March (22/21)	Total Tourist Arrivals up to March 2022	Total Tourist Arrivals up to March 2021	% Change up to March (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
Western Europe	19,648	-	19,648	743	-	50,141	1,159	-
Austria	887	-	887	38	-	2,729	62	-
Belgium	761	-	761	9	-	1,876	16	-
France	5,741	-	5,741	72	-	15,056	116	-
Germany	9,561	-	9,561	502	-	22,680	766	-
Netherlands	1,422	-	1,422	35	-	3,795	74	-
Switzerland	1,243	-	1,243	84	-	3,924	120	-
Others	33	-	33	3	-	81	5	-
Central/ Eastern Europe	21,661	-	21,661	2,217	-	87,895	6,064	-
Belarus	515	-	515	23	-	2,074	67	-
Czech Republic	1,802	-	1,802	52	-	5,031	69	-
Estonia	210	-	210	8	-	680	11	-
Hungary	508	-	508	6	-	1,435	12	-
Kazakhstan	2,598	-	2,598	1,514	-	7,460	2,746	-
Lithuania	466	-	466	11	-	1,373	16	-
Poland	3,315	-	3,315	45	-	10,815	56	-
Romania	517	-	517	4	-	1,821	6	-
Russia	8,899	-	8,899	197	-	37,717	336	-
Slovakia	462	-	462	26	-	1,340	40	-
Ukraine	401	-	401	287	-	13,463	2,592	-
Others	1,968	-	1,968	44	-	4,686	113	-
Southern/ Mediterranean Europe	3,988	-	3,988	121	-	10,427	183	-
Greece	102	-	102	3	-	330	4	-
Italy	730	-	730	34	-	1,786	59	-
Portugal	341	-	341	4	-	704	8	-
Spain	1,112	-	1,112	36	-	2,453	54	-
Turkey	290	-	290	15	-	630	19	-
Israel	1,007	-	1,007	14	-	3,301	15	-
Others	406	-	406	15	-	1,223	24	-
MIDDLE EAST	3,333	-	3,333	113	-	7,796	127	-
Bahrain	80	-	80	8	-	188	8	-
Egypt	445	-	445	9	-	1,115	12	-
Iraq	236	-	236	3	-	479	3	-
Jordan	363	-	363	34	-	817	38	-
Kuwait	131	-	131	3	-	371	3	-
Lebanon	200	-	200	48	-	440	54	-
Oman	93	-	93	1	-	321	1	-
Qatar	53	-	53	-	-	74	1	-
Saudi Arabia	1,397	-	1,397	1	-	3,425	1	-
United Arab Emirates	240	-	240	4	-	357	4	-
Others	95	-	95	2	-	209	2	-
TOTAL	106,500	-	106,500	4,581	-	285,334	9,629	-



Main last departure airports and airlines to Sri Lanka March 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 53% of tourists the last airports had been Dubai, Doha and Chennai. Further, in terms of airlines, Sri Lankan Airlines, Qatar Airways and Emirates were the top airlines, handling 63% of tourists to Sri Lanka.

Chart 5. Main last departure airports to Sri Lanka, March 2022

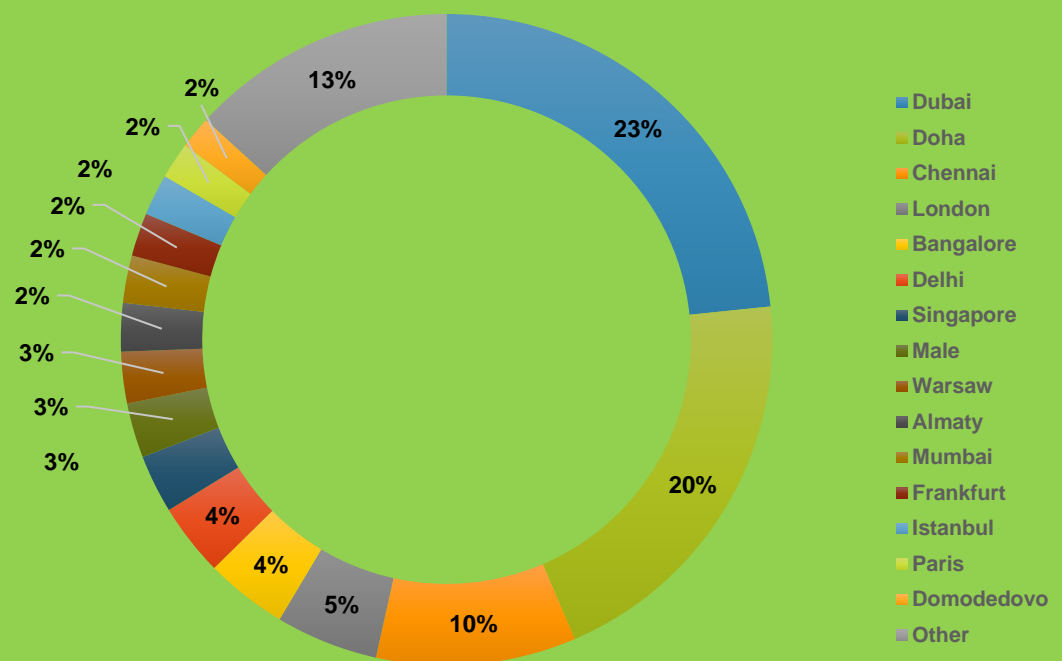
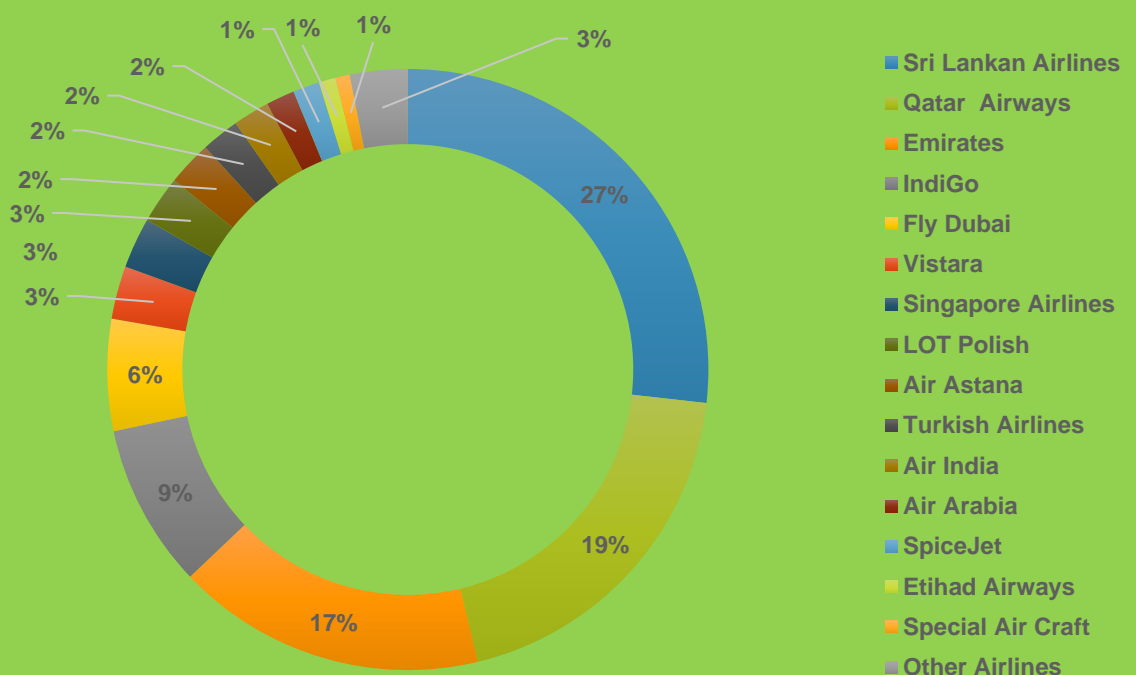


Chart 6. Main airlines to Sri Lanka, March 2022





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

March 2022

The below tables depict the main last departure airports and airlines analyzed by top markets to Sri Lanka. IndiGo and Sri Lankan Airlines are the most popular airlines for Indians. It is noteworthy that Air Astana has been patronised by 91.6% of tourists from Kazakhstan while LOTPolish has been patronised by 51.7% of tourists from Poland thus highlighting the importance of destination accessibility in driving visitation. For majority of travellers from Germany 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, March 2022

Country	Number of passengers																				
	Dubai	Doha	Chennai	London	Bangalore	Delhi	Almaty	Mumbai	Warsaw	Frankfurt	Singapore	Paris	Domodedovo	Hyderabad	Sharja	Abu Dhabi	Istanbul	Male	Melbourne	Bangkok	Other
India	551	147	9,901	17	4,028	3,431	2	2,326	3	0	101	3	0	1,143	58	42	9	95	17	25	1,317
United Kingdom	3,171	3,843	93	4,333	38	57	4	31	62	4	224	29	3	1	13	228	50	93	14	138	479
Germany	2,855	3,469	36	99	18	18	7	12	204	1,786	99	68	1	0	19	183	150	55	0	99	383
Russian Federation	3,763	1,120	38	8	17	27	96	6	13	8	9	17	1,655	0	1,000	81	242	250	0	20	529
France	1,368	2,096	61	57	24	32	1	6	13	31	88	1,452	0	1	3	77	157	45	0	78	151
Poland	1,071	372	8	19	4	9	0	0	1,715	8	28	7	0	0	2	14	8	21	0	14	15
United States	762	1,101	129	59	77	53	7	63	20	12	236	48	2	17	9	107	75	58	3	51	225
Canada	580	1,361	74	367	8	24	2	6	22	86	64	83	1	2	13	158	3	27	3	16	89
Kazakhstan	149	14	3	0	0	0	2,381	0	0	2	2	4	1	0	10	7	2	14	0	4	5
Australia	182	40	33	15	13	28	3	4	1	0	1,010	1	1	5	0	27	2	15	505	9	465

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

Country	Percentage share of the airline																					
	Sri Lankan Airlines	Qatar Airways	Emirates	IndiGo	Fly Dubai	Vistara	Air Astana	LOTPolish	Air India	Singapore Air Lines	SpiceJet	Air Arabia	Turkish Airlines	Ethiad Airways	Air France	Aeroflot	Gulf Air	Oman Air	Malaysia Airlines	Edelweiss	Other Airlines	Total
India	32.1	0.5	1.3	37.9	0.3	12.1	0	0	8.3	0.4	6.3	0.2	0	0.1	0	0	0.1	0.1	0	0	0.1	23,216
United Kingdom	40.9	28.5	21.5	0.5	2	0.3	0	0.5	0.1	1.4	0	0.1	0.4	1.1	0.1	0	1.7	0.5	0.1	0.1	0.1	12,908
Germany	24.4	34.7	28	0.4	1.7	0.1	0.1	2.1	0.1	0.9	0	0.2	1.6	1.7	0.6	0	1	1.9	0.1	0.6	0.1	9,561
Russian Federation	23.5	12.6	21.5	0.5	20.1	0.2	1.1	0.1	0.2	0.1	0	11.2	2.7	0.3	0.2	4.8	0.4	0.1	0	0	0.2	8,899
France	25.3	36.5	20.8	0.8	2.5	0.2	0	0.2	0.4	1.1	0.1	0.1	2.7	0.9	7	0	0.3	0.6	0.1	0.1	0.1	5,741
Poland	3	11.1	21.2	0.3	11.1	0	0	51.7	0	0.2	0	0.1	0.2	0.4	0.2	0	0.1	0.1	0	0	0.2	3,315
United States	22.4	32.6	20.2	4.1	3.4	1.4	0.2	0.6	0.8	6.9	0.1	0.3	2.4	2.7	0.5	0.1	0.2	0.4	0.3	0.1	0.2	3,114
Canada	31.2	42.4	15.3	1	1.4	0.5	0.1	0.7	0.3	2.1	0.2	0.4	0.1	2.7	0.5	0	0.2	0.1	0.1	0.5	0.1	2,989
Kazakhstan	1.6	0.5	1	0	4.2	0	91.6	0	0	0.1	0	0.4	0.1	0	0.2	0	0	0	0	0	0.2	2,598
Australia	40.6	1.7	6.3	1	1.1	0.5	0.1	0	0.3	44.7	0	0	0.1	0.8	0	0	0	0.2	2.3	0	0.2	2,359



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