



Monthly Tourist Arrivals Report:

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

January 2022

Sri Lanka Tourism Development Authority



Introduction

The following document provides a synthesis of the most recent January, 2022 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 1st January 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.





Table of contents

Summary	4
Tourist arrivals by region and percentage share, January 2022	5
Top primary markets and top potential markets, January 2022	6
Top ten source markets January, 2022	8
Tourist arrivals by purpose of visit, January 2022.....	10
International tourist arrivals by country of residence.....	11
Main last departure airports and airlines to Sri Lanka, January 2022.....	14
Top ten markets versus main last departure airports and main airlines to Sri Lanka, January 2022.....	15



Summary

The total number of international tourist arrivals to Sri Lanka during January 2022 was 82,327. This significant improvement during the month of January 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.

The largest source markets recorded for the month of January were Russia, India, Ukraine, the United Kingdom, followed by Germany.

Table 1. Monthly tourist arrivals, January 2022

Month	2021	2022	% change 2022/21
January	1,682	82,327	
February	3,366		
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		



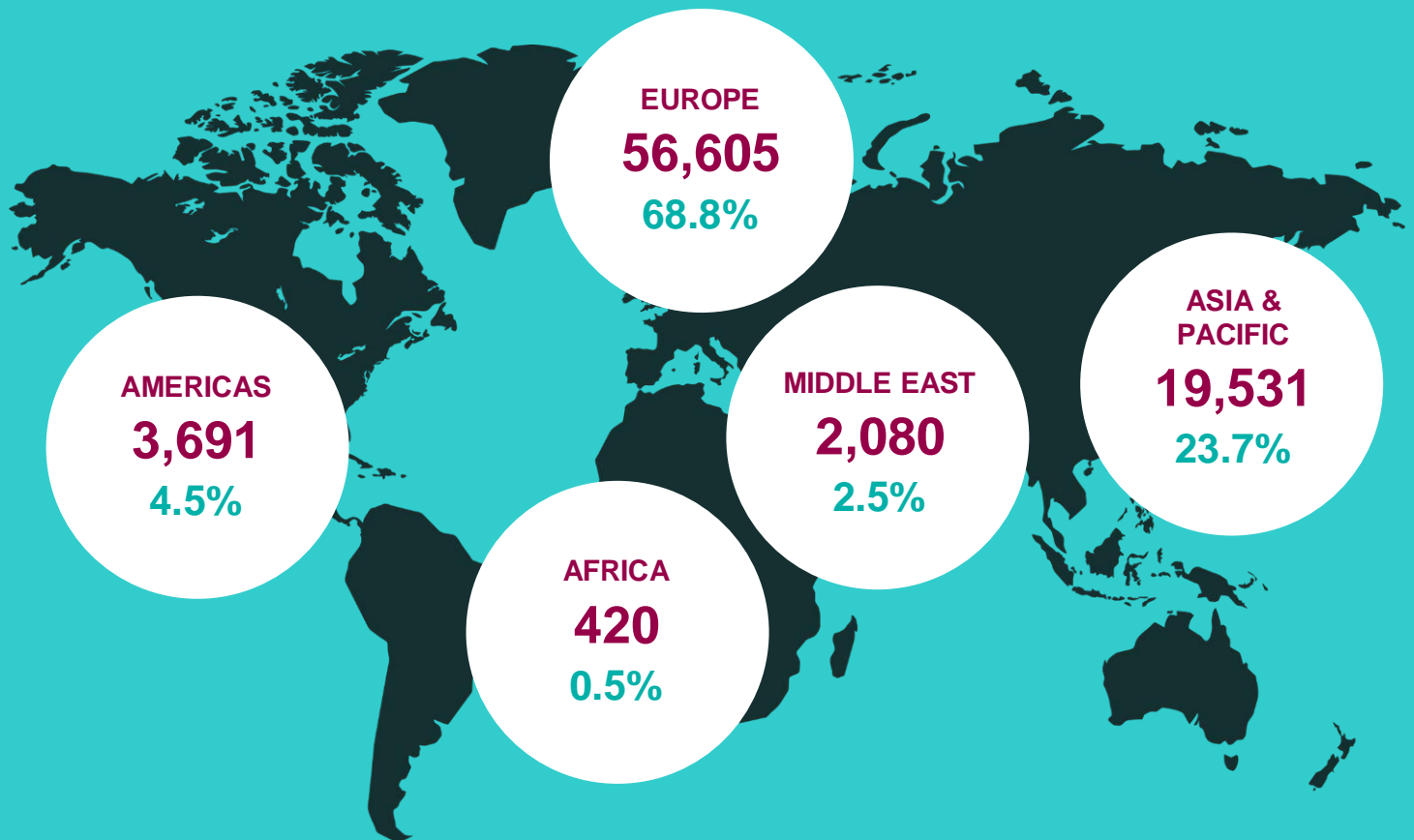
Tourist Arrivals | January 2022

82,327



Tourist arrivals by region and percentage share January 2022

Map 1. Tourist arrivals by region and percentage share



Europe became the largest source of tourist traffic to Sri Lanka with 68.8% of the total traffic received in January 2022. Given the escalating number of COVID-19 cases, this can be considered as significant growth. Pent up demand especially from countries such as Russia, Ukraine, the United Kingdom and Germany is likely to have driven this growth momentum. Asia and the Pacific accounted for 23.7% of total arrivals. The Americas accounted for 4.5% of the total traffic while the Middle East accounted for 2.5%.

January being a peak month for tourist arrivals in Sri Lanka, it is anticipated that arrivals will continue to grow towards the month of March. While signs of recovery were evident, the market uncertainty continues to overshadow the tourism industry with the escalating number of cases of the Omicron variant. It is expected that increasing cases in Europe will further dampen consumer confidence which was gradually building after the devastating Delta variant. Hassle-free travelling in relation to the travel destination and in the outbound destination could be the motivating factors especially for the tourists from the Central/ Eastern European region.



Top primary markets and top potential markets January 2022

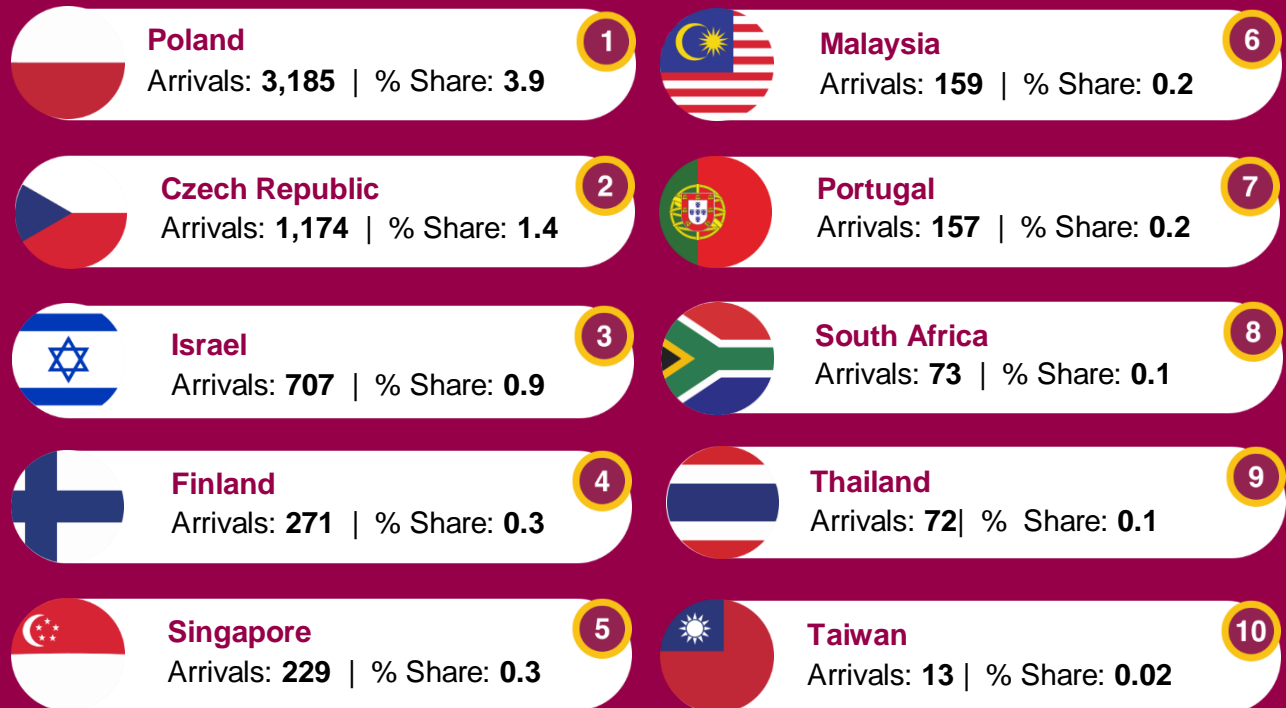
Top primary markets



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).



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 January 2022

The Russian Federation, India, Ukraine, the United Kingdom and Germany were Sri Lanka's top five international tourist generating markets for the month of January this year. Russia was the largest source of tourist visits to Sri Lanka with 16% of the total traffic received in January. An analysis of Russian arrivals in the consecutive years reveals that it has almost exceeded the pre pandemic levels as experienced in January 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. India and the Ukraine accounted for 14% and 10% of the total traffic respectively. The growth in arrivals from countries in the Americas, and 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 increased roll out of COVID-19 vaccine programs and the gradual containment of the pandemic in Sri Lanka.

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

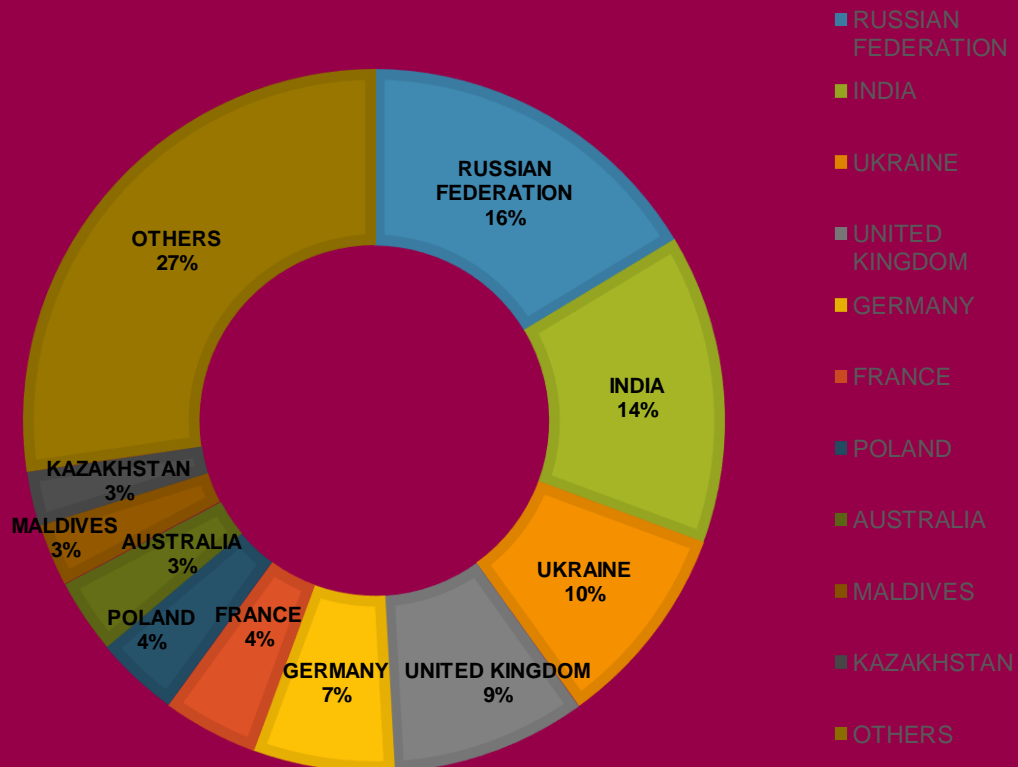
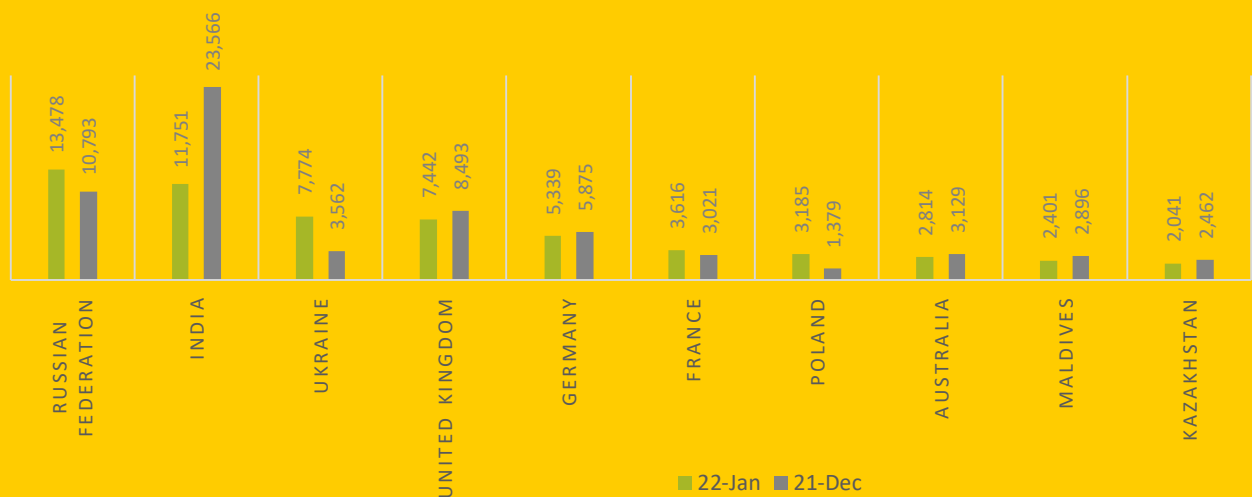




Table 2. Top ten source markets to Sri Lanka, January 2022

Rank	Country of Residence	Tourist Arrivals (January 2022)			Tourist Arrivals (January 2021)
		By Air	By Sea	Total	
1	Russian Federation	13,478	-	13,478	20
2	India	11,751	-	11,751	17
3	Ukraine	7,774	-	7,774	1,460
4	United Kingdom	7,442	-	7,442	3
5	Germany	5,339	-	5,339	19
6	France	3,616	-	3,616	4
7	Poland	3,185	-	3,185	-
8	Australia	2,814	-	2,814	3
9	Maldives	2,401	-	2401	17
10	Kazakhstan	2,041	-	2,041	1

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



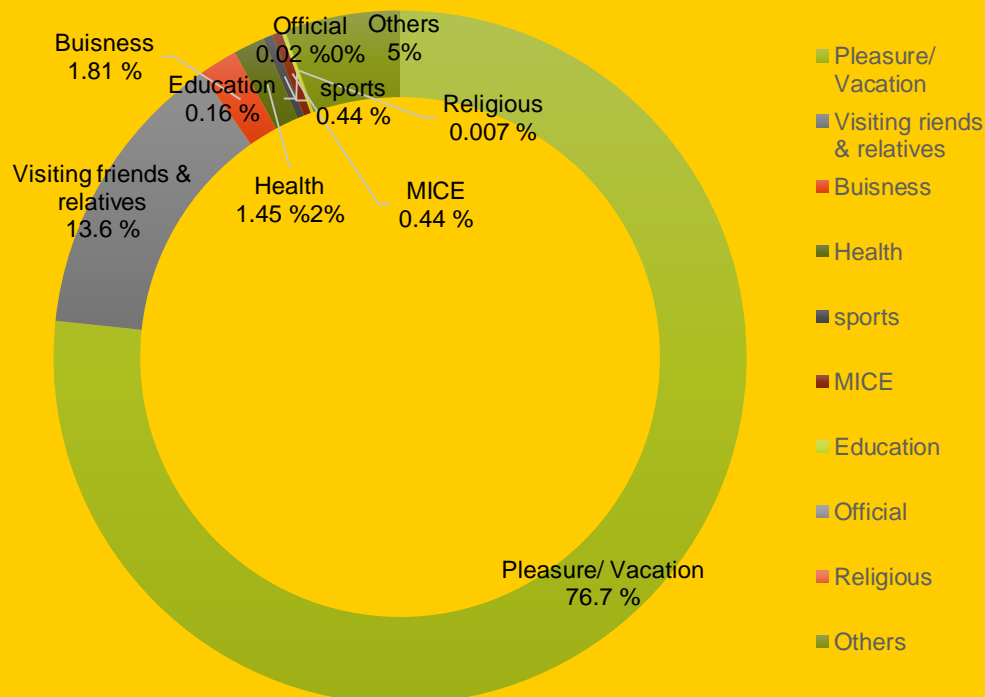


Tourist arrivals by purpose of visit

January 2022

An analysis of tourist arrivals by purpose of visit reveals that a majority (77%) of tourists had visited Sri Lanka for pleasure/vacation, while for 13.6% of tourists the main purpose was visiting friends and relatives. Only 2% of tourists had visited for business related purposes. 1.5% had visited for health related purposes, while 6.5% had visited for purposes such as sports and education.

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





International tourist arrivals by country of residence

	January 2022			Total Tourist Arrivals January 2021	% Change January (21/22)
	Tourist Arrivals				
	By Air	By Sea	Total		
AMERICAS	3,691	0	3,691	27	-
North America	3,516	0	3,516	27	-
Canada	1,666	0	1,666	17	-
Mexico	21	0	21	0	-
United States	1,829	0	1,829	10	-
Carribean & Central America	24	0	24	0	-
Costa Rica	4	0	4	0	-
Jamaica	2	0	2	0	-
Others	18	0	18	0	-
South America	151	0	151	0	-
Argentina	29	0	29	0	-
Brazil	49	0	49	0	-
Chile	29	0	29	0	-
Colombia	20	0	20	0	-
Others	24	0	24	0	-
AFRICA	420	0	420	0	-
North Africa	212	0	212	0	-
Morocco	29	0	29	0	-
Sudan	147	0	147	0	-
Others	36	0	36	0	-
Sub-Saharan Africa	208	0	208	0	-
Kenya	19	0	19	0	-
Mauritius	7	0	7	0	-
Nigeria	5	0	5	0	-
South Africa	73	0	73	0	-
Others	104	0	104	0	-



	January 22			Total Tourist Arrivals January 2021	% Change January (20/21)
	Tourist Arrivals				
	By Air	By Sea	Total		
ASIA & PACIFIC	19,531	0	19,531	80	-
North East Asia	449	0	449	28	-
China	226	0	226	27	-
Japan	92	0	92	1	-
South Korea	104	0	104	0	-
Taiwan	13	0	13	0	-
Others	14	0	14	0	-
South East Asia	700	0	700	12	-
Cambodia	21	0	21	0	-
Indonesia	75	0	75	3	-
Malaysia	159	0	159	1	-
Myanmar	16	0	16	1	-
Philippines	109	0	109	6	-
Singapore	229	0	229	1	-
Thailand	72	0	72	0	-
Vietnam	17	0	17	0	-
Others	2	0	2	0	-
Oceania	2,928	0	2,928	6	-
Australia	2,814	0	2,814	3	-
New Zealand	112	0	112	3	-
Others	2	0	2	0	-
South Asia	15,454	0	15,454	34	-
Afghanistan	0	0	0	0	-
Bangladesh	302	0	302	0	-
Bhutan	30	0	30	0	-
India	11,751	0	11,751	17	-
Iran	260	0	260	0	-
Maldives	2,401	0	2,401	17	-
Nepal	100	0	100	0	-
Pakistan	610	0	610	0	-
EUROPE	56,605	0	56,605	1,575	-
Northern Europe	10,168	0	10,168	3	-
Denmark	1,013	0	1,013	0	-
Finland	271	0	271	0	-
Norway	521	0	521	0	-
Sweden	683	0	683	0	-
United Kingdom	7,442	0	7,442	3	-
Others	238	0	238	0	-



	January- 22			Total Tourist Arrivals January 2021	% Change January (21/22)
	Tourist Arrivals				
	By Air	By Sea	Total		
Western Europe	12,578	0	12,578	49	-
Austria	788	0	788	5	-
Belgium	495	0	495	0	-
France	3,616	0	3,616	4	-
Germany	5,339	0	5,339	19	-
Netherlands	1,141	0	1,141	18	-
Switzerland	1,186	0	1,186	3	-
Others	13	0	13	0	-
Central/ Eastern Europe	31,284	0	31,284	1,520	-
Belarus	736	0	736	30	-
Czech Republic	1,174	0	1,174	0	-
Estonia	185	0	185	0	-
Hungary	425	0	425	0	-
Kazakhstan	2,041	0	2,041	1	-
Lithuania	352	0	352	0	-
Poland	3,185	0	3,185	0	-
Romania	528	0	528	0	-
Russia	13,478	0	13,478	20	-
Slovakia	363	0	363	0	-
Ukraine	7,774	0	7,774	1,460	
Others	1,043	0	1,043	9	-
Southern/ Mediterranea Europe	2,575	0	2,575	3	-
Greece	78		78	0	-
Italy	503	0	503	2	-
Portugal	157	0	157	0	-
Spain	597	0	597	0	-
Turkey	174	0	174	1	-
Israel	707	0	707	0	-
Others	359	0	359	0	-
MIDDLE EAST	2,080	0	2,080	0	-
Bahrain	59	0	59	0	-
Egypt	217	0	217	0	-
Iraq	72	0	72	0	-
Jordan	224	0	224	0	-
Kuwait	36	0	36	0	-
Lebanon	87	0	87	0	-
Oman	101	0	101	0	-
Qatar	4	0	4	0	-
Saudi Arabia	1,167	0	1,167	0	-
United Arab Emirates	64	0	64	0	-
Others	49	0	49	0	-
TOTAL	82,327	0	82,327	1,682	-



Main last departure airports and airlines to Sri Lanka January 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 50% 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 57% of tourists to Sri Lanka.

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

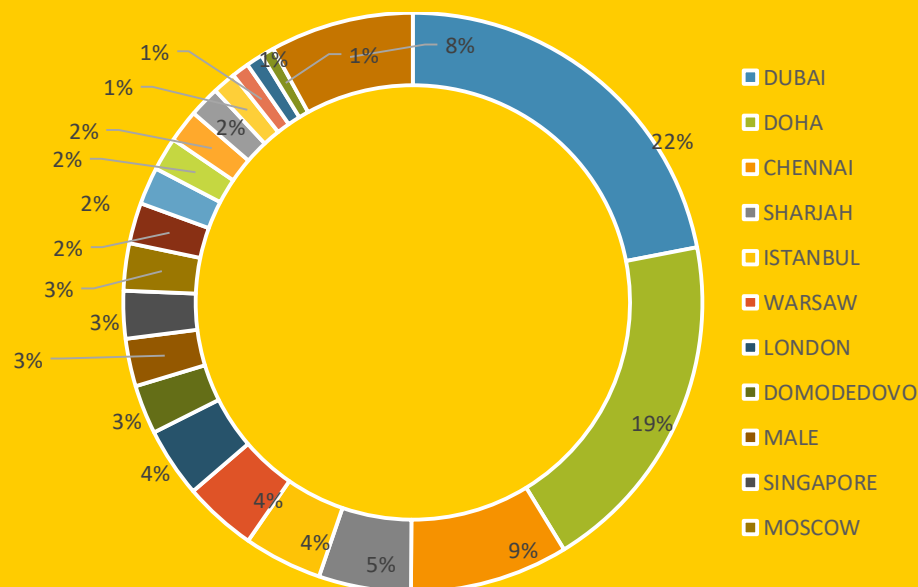
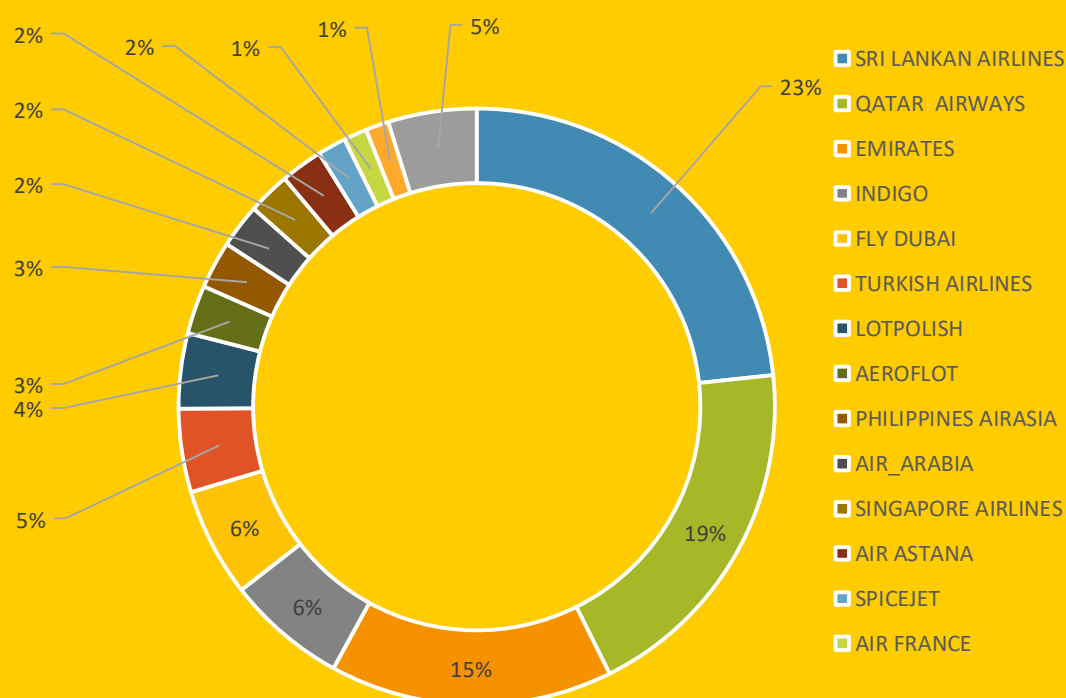


Chart 5. Main airlines to Sri Lanka, January 2022





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

January 2022

The below tables depict the main last departure airports and airlines analyzed by top markets to Sri Lanka. Emirates and Sri Lankan Airlines are the most popular airlines for Russians. It is noteworthy that Air Astana has been patronised by 87.4% of tourists from Kazakhstan while LOT Polish has been patronised by 69% of tourists from Poland thus highlighting the importance of destination accessibility in driving visitation. Sri Lankan Airlines and IndoGo are the most preferred airlines for Indians in travelling to Sri Lanka.

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

Top ten markets	Number of passengers																				
	Dubai	Doha	Chennai	Sharjah	London	Warsaw	Istanbul	Domodedovo	Moscow	Almaty	Male	Bangalore	Singapore	Delhi	Paris	Frankfurt	London Heathrow	Mumbai	Kochi	Melbourne	Other
Russian Federation	5,805	1,282	53	564	71	82	926	2,194	2,080	34	82	24	14	14	12	10	1	0	2	0	228
India	253	58	6,591	18	11	0	7	1	0	0	41	1,383	118	1,217	2	0	3	629	261	48	1,110
Ukraine	696	1,879	37	3,470	3	164	1,191	2	9	17	17	7	5	3	4	1	1	0	0	0	268
United Kingdom	1,384	1,994	42	3	2,359	40	51	1	1	0	66	17	173	17	33	5	851	19	5	2	379
Germany	1,326	1,707	29	3	110	139	129	2	2	2	40	6	39	15	171	1,200	11	5	6	1	396
France	822	1,082	30	4	60	17	84	1	8	4	39	5	65	5	1,154	25	11	2	1	0	197
Poland	488	356	4	1	6	2,198	13	0	4	0	27	1	33	8	2	19	2	0	0	0	23
Australia	64	39	166	1	6	1	1	0	1	0	20	160	1,102	133	2	3	4	92	139	353	527
Maldives	735	6	0	0	64	0	4	0	1	0	1,343	4	3	0	0	0	2	1	5	0	233
Kazakhstan	168	29	3	10	4	3	9	2	8	1,784	6	0	0	3	1	0	0	0	0	0	11

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

Country	Percentage share of the airline																					
	Sri Lankan Airlines	Qatar Airways	Emirates	IndiGo	Fly Dubai	LOT Polish	Turkish Airlines	Aeroflot	Air Asia	Air Astana	Air Arabia	Singapore Airlines	SpiceJet	Air India	Air France	Vistara	Oman Air	Gulf Air	Special Air Craft	Ethiad	Other Airlines	Total
Russian Federation	17.1	9.1	25.7	0.5	17	0.6	7.4	15	0.1	0.3	4.1	0.1	0	0	0.1	0	1.8	1	0	0.2	0	13,478
India	31.4	0.5	1.6	40.5	0.2	0	0.1	0	0	0	0.2	0.9	10.6	8.2	0	5.4	0.1	0.1	0	0.1	0.4	11,751
Ukraine	1.1	24	0.9	0.3	7.8	2.1	15.4	0.1	27	0.2	15.9	0.1	0.1	0	0	0	0.1	0.1	4.4	0.1	0.6	7,774
United kingdom	47.5	27	17.5	0.3	1	0.5	0.7	0	0	0	0	1.6	0	0	0.3	0.1	0.6	2.3	0	0.2	0.2	7,442
Germany	28.3	32	24	0.3	1	2.6	2.6	0	0	0	0.1	0.5	0.1	0	2.9	0.1	1.2	0.4	0	2.2	1.6	5,339
France	23.8	31	19.7	0.7	2.2	0.5	2.4	0.2	0	0.1	0.1	1.2	0.1	0.1	15.3	0.1	1.6	0.6	0	0.2	0.8	3,616
Poland	3.1	12	10.5	0	4.3	69	0.4	0.1	0	0	0	0.1	0	0	0.1	0	0.1	0	0.1	0	0.4	3,185
Australia	49	1.3	2	5.5	0.1	0	0	0	0	0	0	38.1	0.1	0.6	0	2	0	0.1	0	0	0.9	2,814
Maldives	69.2	0.2	30.1	0.2	0	0	0.2	0	0	0	0	0.1	0	0	0	0	0	0	0	0	0	2,401
Kazakhstan	3.1	1.4	1.4	0.1	4.7	0.1	0.4	0.4	0	87.4	0.4	0	0	0	0	0.1	0	0.1	0	0.1	0	2,041



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