



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

February 2023

Sri Lanka Tourism Development Authority

Introduction

The following document provides a synthesis of the most recent February, 2023 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 28th February 2023, 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). 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 2023 was 107,639. This is an increase of 11.5% compared to February 2022 and reaching 46% pre pandemic levels (2018). This trend can be attributed to the peak travel season in Sri Lanka, as well as the other factors such as improved socio economic

conditions and increased connectivity to the country. In addition to the pent-up demand, the relaxation of travel restrictions in various source markets is also crucial in the travel recovery. The top countries of origin for tourists in February were Russian Federation, India, the United Kingdom, Germany and France.

Table 1. Monthly tourist arrivals, February 2023

Month	2022	2023	% change 2023/22
January	82,327	102,545	24.5
February	96,507	107,639	11.5
March	106,500		
April	62,980		
Мау	30,207		
June	32,856		
July	47,293		
August	37,760		
September	29,802		
October	42,026		
November	59,759		
December	91,961		
TOTAL	719,978	210,184	



Tourist Arrivals | February 2023

107,639

Tourist arrivals by region and percentage share **February 2023**

Map 1. Tourist arrivals by region and percentage share



Europe emerged as the primary source of tourists visiting Sri Lanka, accounting for 67.7% of total arrivals. It is believed that pent-up demand from countries such as the Russian Federation, UK, Germany, France and Israel contributed to this increase in tourism.

Meanwhile, 24.6% of tourists came from Asia and the Pacific region, 5.4% from the Americas, and 1.7% from the Middle East. Factors such as the lifting of travel restrictions and improved air accessibility in Sri Lanka could be the factors that contributed to the growth in tourism.

According to the UNWTO, international tourism is expected to further recover in 2023 due to growing demand. However, the international tourism's sustained recovery may be hindered by economic, health, climatic and geopolitical obstacles.

Top primary markets and top potential markets

Top primary markets – February 2023



Note: The top primary markets for Sri Lanka have been identified using visitor arrivals data during the last six months. The previous methodology used to identify the markets was altered due to the current arrival trends in the source markets and the economic crisis in Sri Lanka. The intention is to track these source markets on a go-forward basis to understand future performance of Sri Lanka's tourism economy, including during the projected international tourism recovery period, 2022-2025.



Top Potential markets - February 2023



Note: The top primary markets for Sri Lanka have been identified using visitor arrivals data during the last six months. The previous methodology used to identify the markets was altered due to the current arrival trends in the source markets and the economic crisis in Sri Lanka. The intention is to track these source markets on a go-forward basis to understand future performance of Sri Lanka's tourism economy, including during the projected international tourism recovery period, 2022-2025.



Top ten source markets

February 2023

In February, the top five countries that generated the most international tourism to Sri Lanka were the Russian Federation, India, the United Kingdom, Germany and France. The Russian Federation was the leading source of tourists, accounting for 27% of total arrivals. India accounted for 13%, the United Kingdom for 8%, Germany for 7%, and France for 6%. The Russian Federation remained the top source of tourism to Sri Lanka, owing to increased air accessibility via direct and charter flights from Russia and favorable conditions within Sri Lanka. A comparison of tourist arrival numbers recorded for February 2022, reveals that there has been significant growth in tourist arrivals for the Russian Federation (89.5), Australia (84.4), Canada (58.6), Israel (37.8), and the United States (31.7). It is worth noting that the growth recorded for Russia and Israel is particularly significant, as tourist arrivals from these countries increased by 123.5% and 42.8%, respectively, compared to pre-COVID levels in 2019.

On the other hand, there has been a decline of 19.4% in tourist arrivals from the United Kingdom compared to February 2022. This decline could be attributed to factors such as a decrease in Sri Lankan diaspora visiting their friends and relatives, as well as a preference for short-haul destinations such as Spain, Italy, and France.

Overall, the growth in tourist arrivals for Russia and Israel and the decline in arrivals from the United Kingdom could be indicative of shifting trends in outbound travel preferences and changes in diaspora travel patterns.

Chart 1.Top ten source markets to Sri Lanka, February 2023

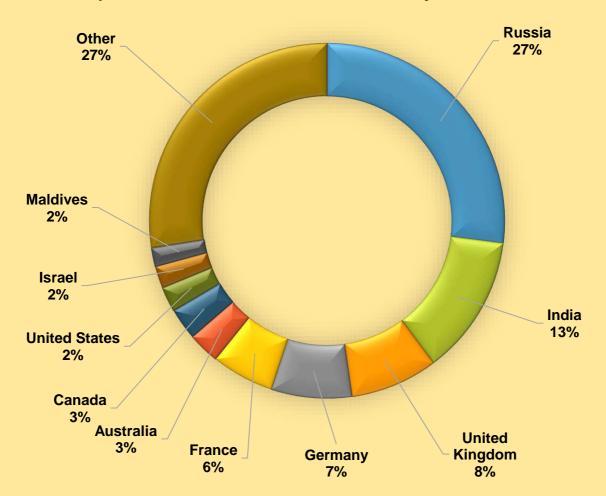
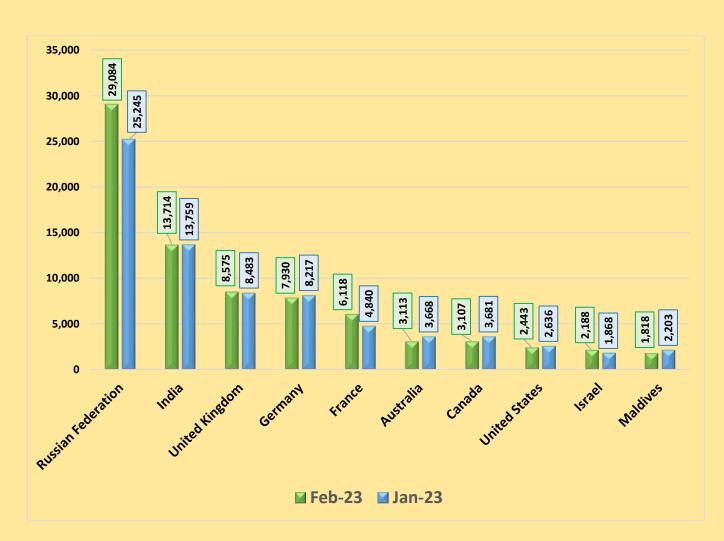


Table 2. Top ten source markets to Sri Lanka, February 2023

	Country of	Tourist Arriv	Tourist Arrivals (February 2023)										
Rank	Residence	By Air	By Sea	Total	(February 2022)								
1	Russian Federation	29,084	0	29,084	15,340								
2	India	13,714	0	13,714	12,744								
3	United Kingdom	8,575	0	8,575	10,642								
4	Germany	7,930	0	7,930	7,780								
5	France	6,118	0	6,118	5,699								
6	Australia	3,113	0	3,113	1,688								
7	Canada	3,107	0	3,107	1,958								
8	United States	2,443	0	2,443	1,855								
9	Israel	2,188	0	2,188	1,587								
10	Maldives	1,818	0	1,818	1,532								

Chart 2. Comparison of arrivals from top ten markets to Sri Lanka, Feb / Jan - 2023



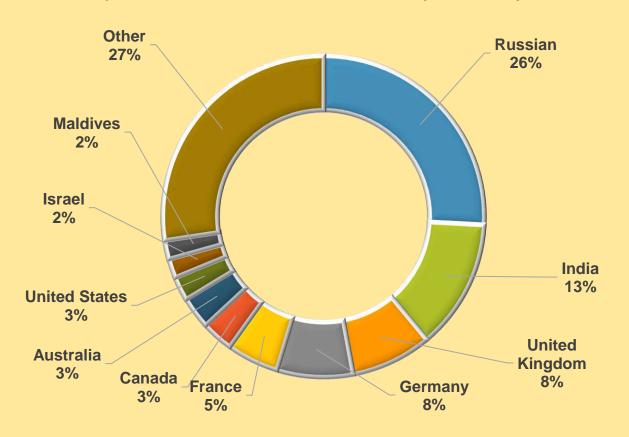
Top ten source markets January to February 2023

The Russian Federation, India, the United Kingdom, Germany and France were Sri Lanka's top five international tourist-generating markets from January to February this year. An increase of 88.6% in arrivals of Russian tourists is recorded from January to February 2023 in comparison to the same period in 2022. It is noteworthy that the tourist from the United Kingdom recorded a decrease of 5.7 for the period, January to February 2023 in comparison to the same period in 2022.

Table 3. Top ten markets to Sri Lanka, January to February 2023

Rank	Country of Residence	Tourist Arrivals (Jan ~ February 2023)	Tourist Arrivals (Jan ~ February 2022)					
1	Russian Federation	54,338	28,818					
2	India	27,473	24,495					
3	United Kingdom	17,058	18,084					
4	Germany	16,147	13,119					
5	France	10,958	9,315					
6	Canada	6,788	3,624					
7	Australia	6,781	4,502					
8	United States	5,079	3,684					
9	Israel	4,056	2,294					
10	Maldives	4,021	3,933					
11	Others	57,489	66,966					
	Total	210,184	178,834					

Chart 3. Top ten source markets to Sri Lanka, January to February 2023



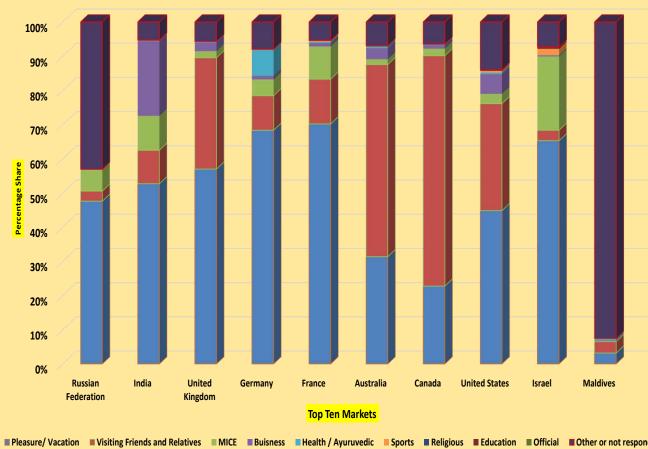
Tourist arrivals by purpose of visit

February 2023

An analysis of tourist arrivals by purpose of visit reveals that a majority 54.3% of tourists had visited Sri Lanka for pleasure/vacation, while for 13.1% of tourists the main purpose was visiting friends and relatives. Only 4.9% of tourists had visited for business related purposes. 6.6% had visited for MICE purposes, while 1.01% and 0.32% had visited for purposes such as health / ayuruvedic and sports.

The majority of tourists visiting Sri Lanka from the top source markets of Russia, India, Germany, the United Kingdom, France, and Israel, travelled to Sri Lanka for pleasure or vacation. Specifically, 47.5% of tourists from Russia, 52.6% from India, 68.3% from Germany, 56% from the United Kingdom, 70% from France, and 65.2% from Israel visited Sri Lanka for this purpose. It is noteworthy that for majority of tourists from Canada (67.3%) and Australia(56.1%) the main purpose of visit was seeing their friends and relatives. The presence of Sri Lankan diaspora in these countries could be the likely reason for this trend. Only 22.7% of tourists from Canada and 31.3% of tourists from Australia had come for pleasure/vacation purpose. Further 21.5% of tourists from Israel and 10% of Indians had come to Sri Lanka for Meetiings, Incentives, Conferences and Exhibitions while 21.8% of Indians had visited Sri Lanka for Business purposes

Chart 4: Purpose of visit vs main source markets



International tourist arrivals by country of residence

	Fe	ebruary 20	23	Tourist Arrivals	% Change	Total Tourist Arrivals	Total Tourist Arrivals	% Change up to		
	To	urist Arriv	als	Feb. 2022	Feb. (23/22)	up to Feb	up to Feb	Feb. (23/22)		
	By Air	By Sea	Total		2023	2023	2022	(25/22)		
AMERICAS	5,873	0	5,873	4,027	45.84	12,525	7,718	62.28		
North America	5,590	0	5,590	3,846	45.35	11,926	7,362	61.99		
Canada	3,107	0	3,107	1,958	58.68	6,788	3,624	87.31		
Mexico	40	0	40	33	21.21	59	54	9.26		
United States	2,443	0	2,443	1,855	31.70	5,079	3,684	37.76		
Carribean & Central America	45	0	45	40	12.50	93	64	45.31		
Costa Rica	04	0	04	11	(63.64)	10	15	(33.33)		
Jamaica	01	0	01	0		02	2	0		
Others	40	0	40	29	37.93	81	47	72.34		
South America	238	0	238	141	68.79	506	292	73.29		
Argentina	43	0	43	25	72.00	119	54	120.37		
Brazil	83	0	83	48	72.92	184	97	89.69		
Chile	45	0	45	14	221.43	71	43	65.12		
Colombia	38	0	38	28	35.71	74	48	54.17		
Others	29	0	29	26	11.54	58	50	16.00		
AFRICA	418	0	418	539	(22.45)	877	959	(8.55)		
North Africa	130	0	130	272	(52.21)	302	484	(37.60)		
Morocco	38	0	38	61	(37.70)	85	90	(5.56)		
Sudan	37	0	37	151	(75.50)	98	298	(67.11)		
Others	55	0	55	60	(8.33)	119	96	23.96		
Sub-Saharan	288	0	288	267	7.87	E75	475	21.05		
Africa	40	0	40	19	110.53	575 63	475 38	65.79		
Kenya	21		21	14	50.00	40	36 21	90.48		
Mauritius		0					8			
Nigeria	02	0	02	3		(33.33) 12		50.00		
South Africa	141	0	141	161	(12.42)	266	234	13.68		
Others	84	0	84	70	20.00	194	174	11.49		

		ebruary 20 ourist Arriv		Tourist Arrivals Feb .	% Change Feb .	Total Tourist Arrivals	Total Tourist Arrivals	% Change up to
	By Air	By Sea	Total	2022	(23/22)	up to Feb 2023	up to Feb 2022	Feb. (23/22)
ASIA & PACIFIC	26,535	0	26,535	18,862	40.68	52,544	38,393	36.86
North East Asia	3,222	0	3,222	550	485.82	5,404	999	440.94
China	1,535	0	1,535	266	477.07	2,370	492	381.71
Japan	974	0	974	122	698.36	1,718	214	702.80
South Korea	508	0	508	117	334.19	958	221	333.48
Taiwan	193	0	193	23	739.13	344	36	855.56
Others	12	0	12	22	(45.45)	14	36	(61.11)
South East Asia	1,996	0	1,996	850	134.82	3,711	1,550	139.42
Cambodia	57	0	57	22	159.09	88	43	104.65
Indonesia	175	0	175	81	116.05	313	156	100.64
Malaysia	657	0	657	147	346.94	1,153	306	276.80
Myanmar	36	0	36	23	56.52	71	39	82.05
Philippines	262	0	262	157	66.88	450	266	69.17
Singapore	486	0	486	283	71.73	900	512	75.78
Thailand	210	0	210 103	86	144.19	489	158	209.49
Vietnam	103			40	157.50	220	57	285.96
Others	10	0	10	11	(9.09)	27	13	107.69
Oceania	3,471	0	3,471	1,823	90.40	7,541	4,751	58.72
Australia	3,113	0	3,113	1,688	84.42	6,781	4,502	50.62
New Zealand	346	0	346	131	164.12	740	243	204.53
Others	12	0	12	4	200.00	20	6	233.33
South Asia	17,846	0	17,846	15,639	14.11	35,888	31,093	15.42
Afghanistan	02	0	02	2	0.00	11	2	450.00
Bangladesh	531	0	531	259	105.02	1,248	561	122.46
Bhutan	19	0	19	11	72.73	51	41	24.39
India	13,714	0	13,714	12,744	7.61	27,473	24,495	12.16
Iran Maldives	791	0	791	303	161.06	1,226	563	117.76 2.24
Nepal	1,818 247	0	1,818 247	1,532 97	18.67 154.64	4,021 539	3,933 197	173.60
Pakistan	724	0	724	691	4.78	1,319	1,301	1.38
EUROPE	72,957	0	72,957	70,696	3.20	140,812	127,301	10.61
Northern Europe	11,604	0	11,604	13,967	(16.92)	23,271	24,135	(3.58)
Denmark	1,110	0	1,110	1,217	(8.79)	2,191	2,230	(1.75)
Finland	204	0	204	298	(31.54)	461	569	(18.98)
Norway	567	0	567	595	(4.71)	1,265	1,116	13.35
Sweden	836	0	836	818	2.20	1,707	1,501	13.72
United Kingdom	8,575	0	8,575 312	10,642	(19.42)	17,058	18,084	(5.67)
Others	312	0	312	397	(21.41)	589	635	(7.24)

		oruary 2 Irist Arri		Tourist Arrivals Feb .	% Change Feb .	Total Tourist Arrivals	Total Tourist Arrivals up to Feb	% Change
	By Air	By Sea	Total	2022	(23/22)	up to Feb 2023	2022	up to Feb. (23/22)
Western Europe	19,050	0	19,050	17,915	6.34	37,034	30,493	21.45
Austria	934	0	934	1,054	(11.39)	1,890	1,842	2.61
Belgium	725	0	725	620	16.94	1,371	1,115	22.96
France	6,118	0	6,118	5,699	7.35	10,958	9,315	17.64
Germany	7,930	0	7,930	7,780	1.93	16,147	13,119	23.08
Netherlands	1,485	0	1,485	1,232	20.54	2,999	2,373	26.38
Switzerland	1,812	0	1,812	1,495	21.20	3,581	2,681	33.57
Others	46	0	46	35	31.43	88	48	83.33
Central/ Eastern Europe	36,728	0	36,728	34,950	5.09	69,466	66,234	4.88
Belarus	1,244	0	1,244	823	51.15	2,448	1,559	57.02
Czech Republic	1,206	0	1,206	2,055	(41.31)	2,166	3,229	(32.92)
Estonia	193	0	193	285	(32.28)	375	470	(20.21)
Hungary	405	0	405	502	(19.32)	805	927	(13.16)
Kazakhstan	328	0	328	2,821	(88.37)	798	4,862	(83.59)
Lithuania	296	0	296	555	(46.67)	574	907	(36.71)
Poland	1,118	0	1,118	4,315	(74.09)	2,387	7,500	(68.17)
Romania	398	0	398	776	(48.71)	714	1,304	(45.25)
Russia	29,084	0	29,084	15,340	89.60	54,338	28,818	88.56
Slovakia	515	0	515	515	0.00	866	878	(1.37)
Ukraine	562	0	562	5,288	(89.37)	1,446	13,062	(88.93)
Others	1,379	U	1,379	1,675	(17.67)	2,549	2,718	(6.22)
Southern/ Mediterranean Europe	5,575	0	5,575	3,864	44.28	11,041	6,439	71.47
Greece	163	0	163	150	8.67	314	228	37.72
Italy	1,409	0	1,409	553	154.79	2,886	1,056	173.30
Portugal	268	0	268	206	30.10	498	363	37.19
Spain	770	0	770	744	3.49	1,627	1,341	21.33
Turkey	246	0	246	166	48.19	608	340	78.82
Israel	2,188	0	2,188	1,587	37.87	4,056	2,294	76.81
Others	531	0	531	458	15.94	1,052	817	28.76
MIDDLE EAST	1,856	0	1,856	2,383	(22.11)	3,426	4,463	(23.24)
Bahrain	35	0	35	49	(28.57)	169	108	56.48
Egypt	241	0	241	453	(46.80)	368	670	(45.07)
Iraq	92	0	92	171	(46.20)	155	243	(36.21)
Jordan	227	0	227	230	(1.30)	488	454	7.49
Kuwait	219	0	219	204	7.35	381	240	58.75
Lebanon	188	0	188	153	22.88	299	240	24.58
Oman	229	0	229	127	80.31	412	228	80.70
Qatar	46	0	46 365	17	170.59	80	21	280.95
Saudi Arabia	365	0	365	861	(57.81)	705	2,028	(65.24)
United Arab Emirates	138	0	138	53	160.38	239	117	104.27
Others	76	0	76	65	16.92	130	114	14.04
TOTAL	107,639	0	107,639	96,507	11.53	210,184	178,834	17.53

Main last departure airports and airlines to Sri Lanka, February 2023

Air connectivity is critical to the tourism industry in Sri Lanka, as shown by the analysis of departure airports. Chart 5 reveals that 39% of tourists had last departed from airports in Dubai, Doha and Chennai. Sri Lankan Airlines, Emirates and Qatar Airways were the most popular airlines, handling 58% of the tourists to Sri Lanka. Dubai stood out as the main last departure airport (19%), and Sri Lankan Airlines as the top main airline (33%).

Chart 5. Main last departure airports to Sri Lanka, February 2023

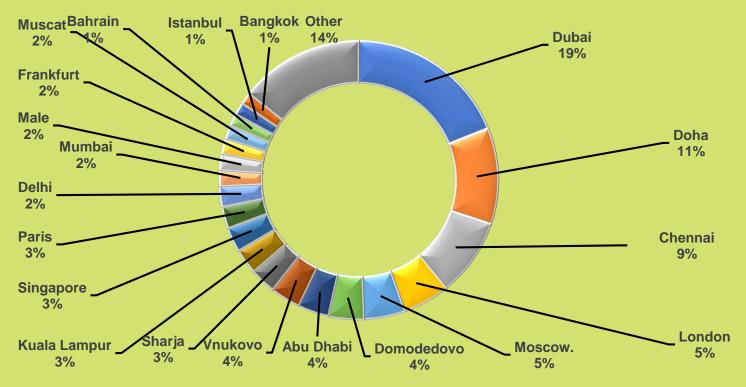
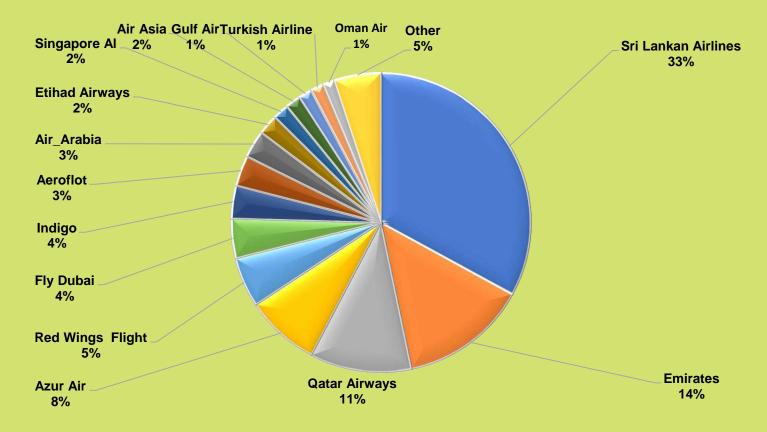


Chart 6. Main airlines to Sri Lanka, February 2023



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

February 2023

The data shows that the choice of last departure airports and airlines for tourists visiting Sri Lanka differ based on their top markets. Indian tourists tend to choose Sri Lankan Airlines and IndiGo, while Azur Air, Red Wings, and Aeroflot are popular among Russian tourists. Sri Lankan Airlines is the preferred choice for tourists from the United Kingdom, France, Australia, United States, Maldives, Germany, and Canada. Additionally, the data highlights that Israeli tourists prefer Emirates, with Dubai serving as the main last departure airport. This underscores the importance of destination accessibility in driving tourism.

Table 4. Top ten markets vs. main last departure airports to Sri Lanka, February 2023

Country	Sri Lankan Airlines	Emirates	Qatar Airways	Azur Air	Red Wings Flight	Fly Dubai	IndiGo	Aeroflot	Air Arabia	Etihad Airways	Singapore Airlines	Air Asia	Gulf Air	Turkish Airline	Oman Air	Air India	Air France	Malaysia Airlines	Guinee Airlines	China Eastern Airlines	Other	Total
Russia	4.45	8.16	2.46	28.93	17.32	7.72	0.79	12.04	6.12	1.02	0.06	1.34	4.29	0.86	1.68	0.16	0.04	0.10	0.88	0.00	1.58	29,084
India	70.24	1.90	0.29	0.01	0.06	0.36	19.4 8	0.00	0.25	0,12	0.18	0.10	0.02	0.05	0.14	5.59	0.01	0.14	0.03	0.02	1.00	13,714
United Kingdom	55.17	22.74	11.52	0.00	0.00	0.58	1.40	0.00	0.37	2.78	0.51	1.22	0.49	0.33	0.58	0.43	0.19	0.42	0.02	0.00	1.24	8,575
Germany	32.11	24.17	31.26	0.13	0.00	0.86	0.79	0.03	0.23	3.30	0.35	1.29	0.54	1.02	1.61	0.47	0.48	0.20	0.13	0.00	1.03	7,930
France	36.32	26.40	13.14	0.36	0.00	1.10	1.00	0.00	0.28	3.64	0.25	1.06	0.31	1.70	2.55	0.46	10.6 9	0.18	0.02	0.00	0.56	6,118
Australia	58.46	3.31	1.19	0.03	0.00	0.19	1.19	0.00	0.10	0.84	24.29	3.15	0.06	0.00	0.03	0.93	0.03	5.49	0.00	0.10	0.61	3,113
Canada	66.27	10.59	8.79	0.00	0.03	0.32	1.80	0.00	0.26	1.19	1.67	1.74	0.32	0.06	0.42	1.45	2.25	0.19	0.13	0.00	2.51	3,107
United States	33.36	13.02	29.84	0.08	0.37	0.57	3.97	0.00	0.41	4.91	4.22	2.42	0.08	1.84	0.37	1.19	1.47	0.90	0.12	0.16	0.70	2,443
Israel	16.96	43.24	0.69	0.05	0.05	17.37	4.71	0.05	0.23	13.12	0.18	0.18	1.19	0.09	0.09	1.83	0.00	0.00	0.00	0.00	0.00	2,188
Maldives	58.20	26.90	0.11	0.28	0.00	7.76	0.33	0.00	0.00	0.11	0.22	0.28	0.00	2.86	0.00	0.00	0.00	0.00	0.00	0.00	2.97	1,818

Table 5. Top ten markets vs. main airlines to Sri Lanka, February 2023

Country	Dubai	Doha	Chennai	London	Moscow	Domodedovo	Abu Dhabi	Vnukovo	Sharjah	Kuala Lumpur	Singapore	Paris	Delhi	Mumbai	Male	Frankfurt	Muscat	Bahrain	Istanbul	Bangkok	Other	Total
Russia	4,777	736	321	8	4,997	4,228	828	3,598	1,780	514	26	17	118	13	94	14	541	1,248	250	114	4,862	29,084
India	434	46	7,091	19	0	0	26	1	34	67	81	2	1,77 7	1,086	39	1	23	3	7	50	2,927	13,714
United Kingdom	2,076	1,008	347	3,596	0	0	258	0	32	175	119	28	101	98	80	8	54	42	28	131	394	8,575
Germany	2,017	2,506	212	119	2	0	519	2	18	143	53	74	53	208	108	1,207	132	43	81	84	349	7,930
France	1,714	825	174	126	1	0	379	3	17	83	61	1,991	27	121	42	60	159	19	104	48	164	6,118
Australia	132	39	144	19	0	0	33	0	3	297	1,038	2	30	23	36	0	.1	2	0	37	1,277	3,113
Canada	398	318	318	890	0	0	50	0	8	90	87	210	43	171	49	151	14	10	2	47	251	3,107
United States	349	783	208	78	0	0	146	1	10	91	148	48	84	44	60	7	11	2	45	74	254	2,443
Israel	1,348	16	161	0	2	0	383	0	5	4	15	0	30	3	8	0	2	26	1	138	46	2,188
Maldives	636	2	16	3	1	0	3	0	0	19	16	1	6	0	863	0	0	0	52	10	190	1,818



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