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Monthly Tourist Arrivals Report:

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

March 2023

Sri Lanka Tourism Development Authority



Introduction

The following document provides a synthesis of the most recent March, 2023 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st March 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.

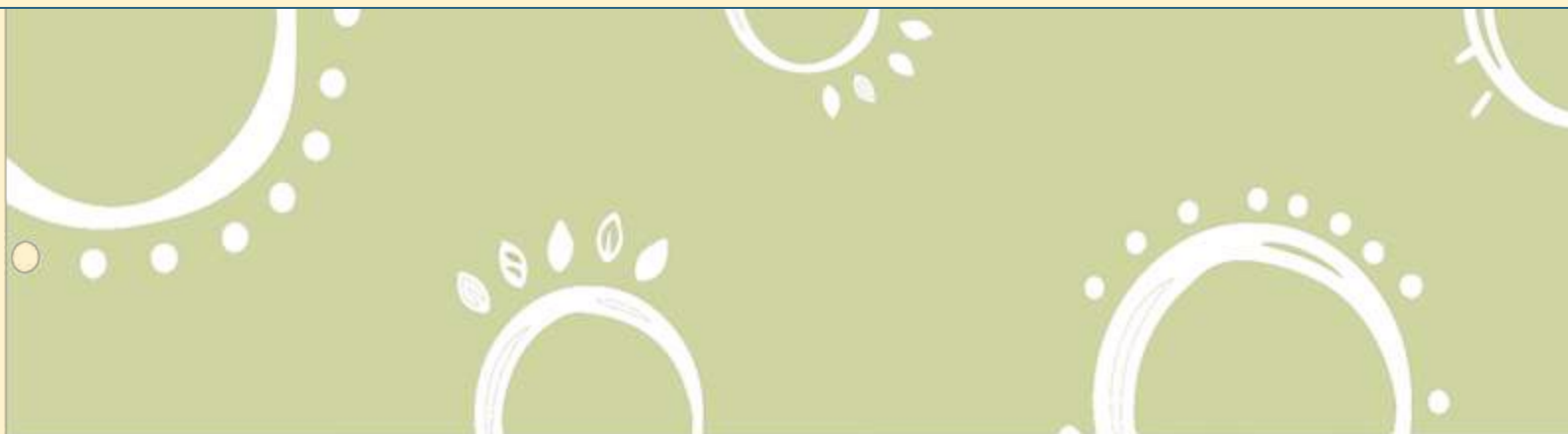


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Summary

The total number of international tourist arrivals to Sri Lanka during March 2023 was 125,495. This is an increase of 17.8% compared to March 2022 and reaching 54% pre pandemic levels (2018). The surge in tourism can be credited to several factors including the high season for travel in Sri Lanka, as well as improvements in socio-economic conditions and enhanced

accessibility to the country. Furthermore, the easing of travel limitations in various countries is also a key factor in the recovery of the travel industry. In March, the primary countries from which tourists arrived were the Russian Federation, India, the United Kingdom, Germany, and France.

Table 1. Monthly tourist arrivals, March 2023

Month	2022	2023	% change 2023/22
January	82,327	102,545	24.5
February	96,507	107,639	11.5
March	106,500	125,495	17.8
April	62,980		
May	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	335,679	



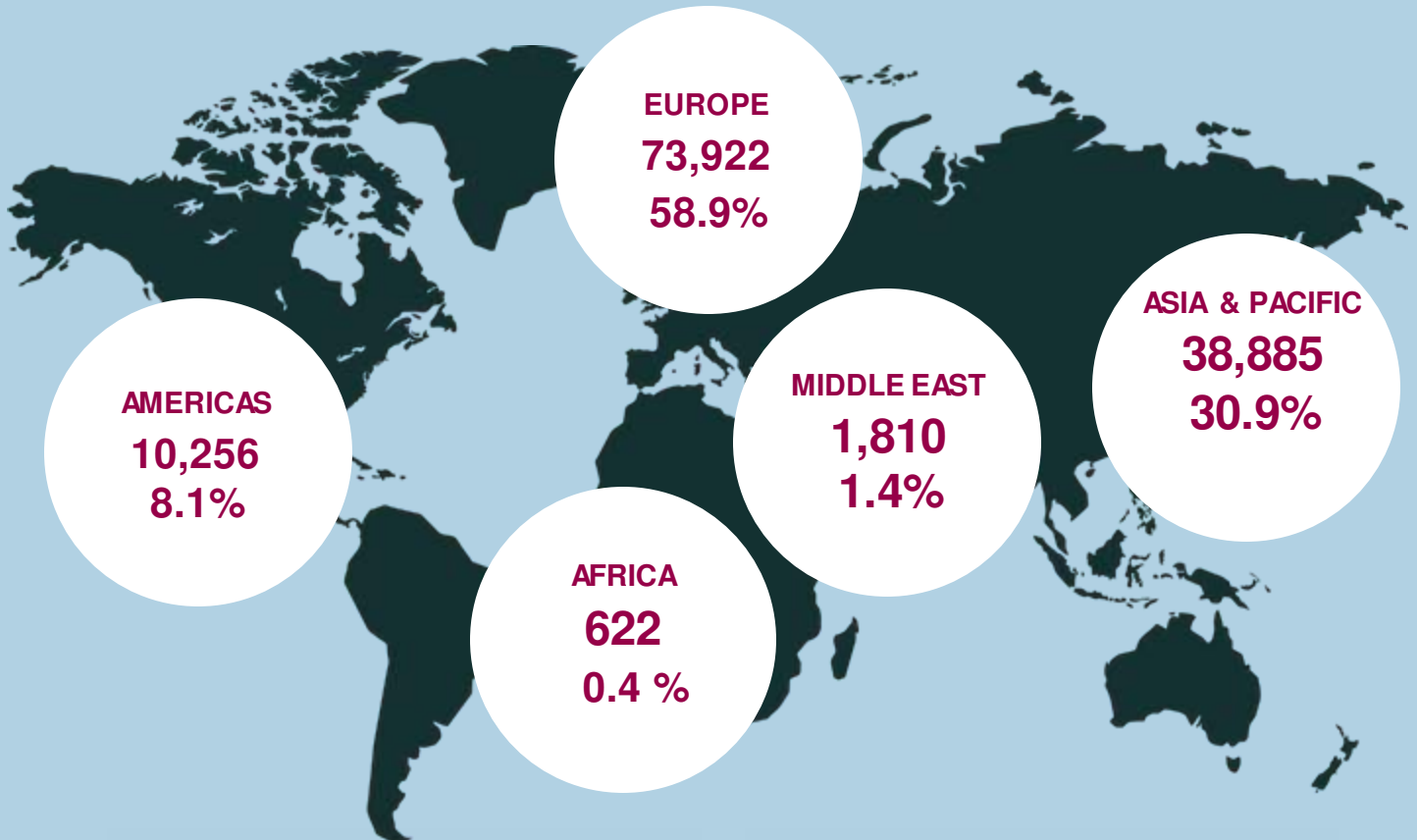
Tourist Arrivals | March 2023

125,495



Tourist arrivals by region and percentage share March 2023

Map 1. Tourist arrivals by region and percentage share



The majority of tourists visiting Sri Lanka, which accounted for 58.9% of total arrivals, originated from Europe. This rise in tourism is thought to be driven by a buildup of demand from countries like the Russian Federation, the United Kingdom, Germany, and France.

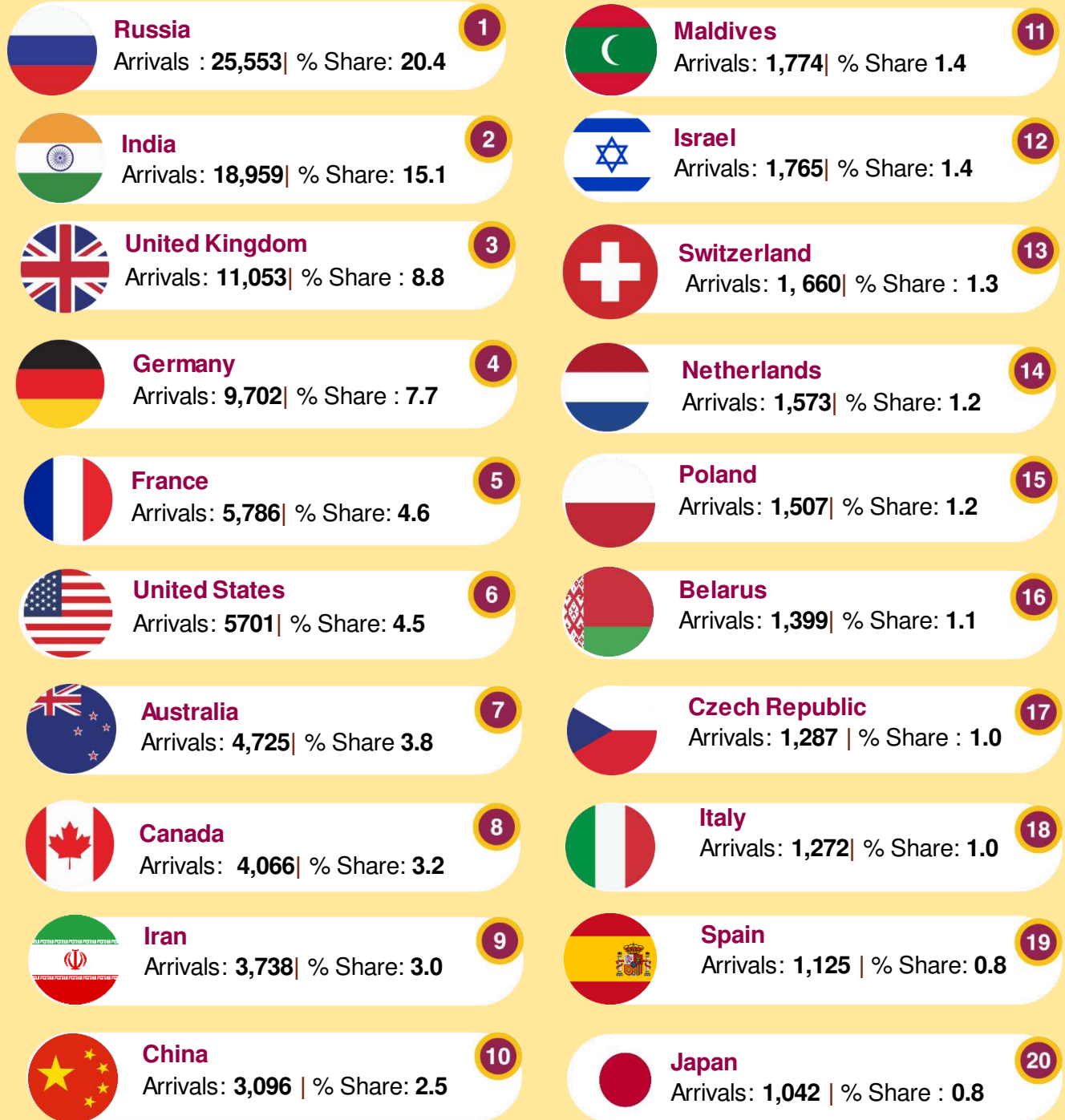
Meanwhile, 30.9% of tourists came from Asia and the Pacific region, 8.1% from the Americas, and 1.4% from the Middle East. Factors such as the lifting of travel restrictions and improved air accessibility in Sri Lanka could be the factors that contributed to the growth in tourism.

According to UNWTO, international tourism is predicted to continue its recovery in 2023, mainly driven by an increasing demand for travel. However, it is important to note that the sector's growth could be impeded by various challenges such as economic, health-related, climatic, and geopolitical factors, which may affect its sustained recovery.



Top primary markets and top potential markets

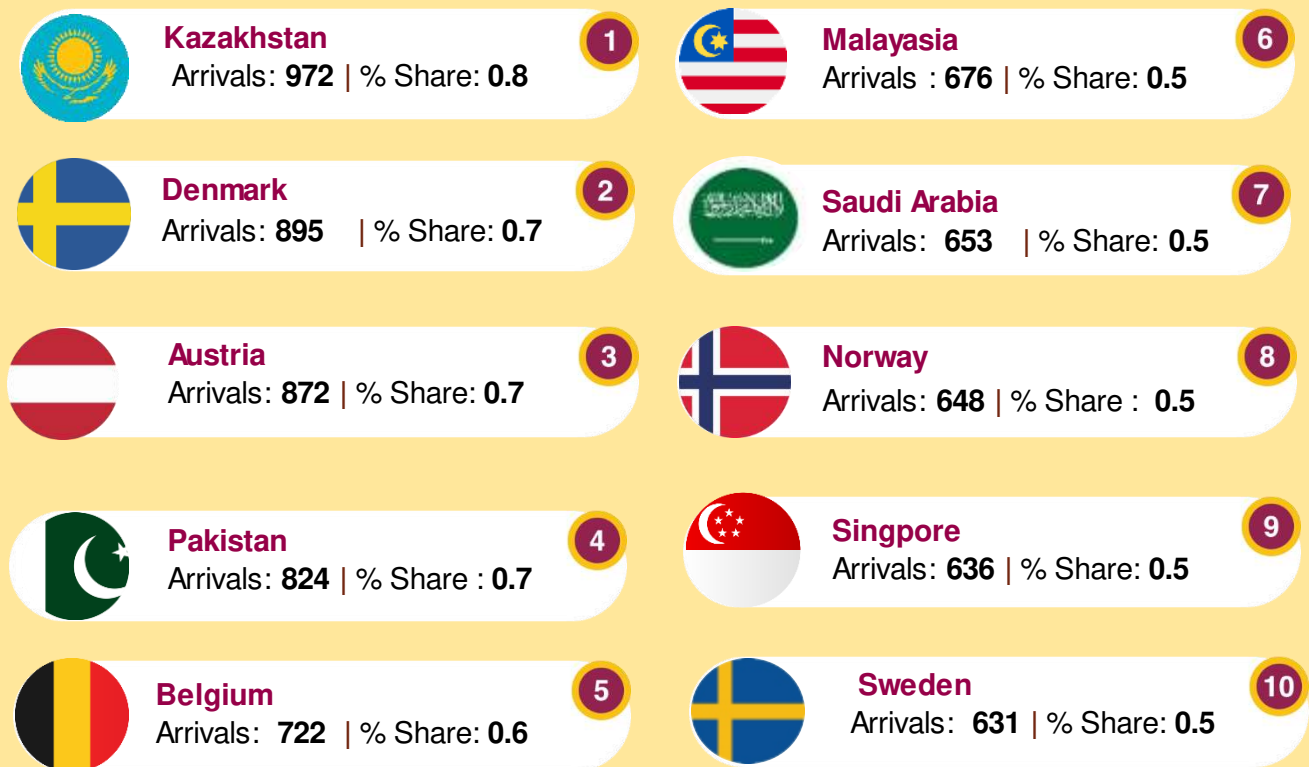
Top primary markets – March 2023



Note: The top primary markets for Sri Lanka have been identified using visitor arrivals. The previous methodology used to identify the markets was altered due to the current arrival trends in the source markets and the socio economic factors 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 - March 2023



Note: The top primary markets for Sri Lanka have been identified using visitor arrivals data. The previous methodology used to identify the markets was altered due to the current arrival trends in the source markets and the socio economic factors 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

March 2023

In March, Sri Lanka received the most international tourists from the Russian Federation, India, the United Kingdom, Germany, and France, with the Russian Federation leading the pack at 20% of total arrivals. The percentage shares recorded for India, United Kingdom, Germany and France were 15%, 9%, 8% and 5%. The Russian Federation remained the primary source of tourism to Sri Lanka due to increased air accessibility, favorable conditions within the country and geopolitical factors. When comparing tourist arrival figures for March 2022, it is notable that there has been substantial growth in arrivals from countries such as Russia, Australia, China, and the United States. The growth rates recorded for Russia and Iran, in particular, were remarkable, as they increased by 101% and 265%, respectively, compared to pre-COVID levels in March 2019. In contrast, France and Germany had the lowest growth rates in comparison to March 2022, which could be attributed to negative travel advisories and perceptions about Sri Lanka.

In contrast, there was a decrease of 14.3% in tourist arrivals from the United Kingdom and an 18.3% decrease in tourist arrivals from India compared to March 2022. This decline in tourist arrivals could be attributed to factors such as a reduction in Sri Lankan diaspora visiting their friends and relatives and a preference for short-haul destinations such as Spain, Italy, and France, especially among tourists from the United Kingdom. Comparing the decline in tourist arrivals to March 2019, the United Kingdom and China recorded drops of 63% and 87%, respectively, which could be attributed to COVID-related travel restrictions, particularly in China.

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

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

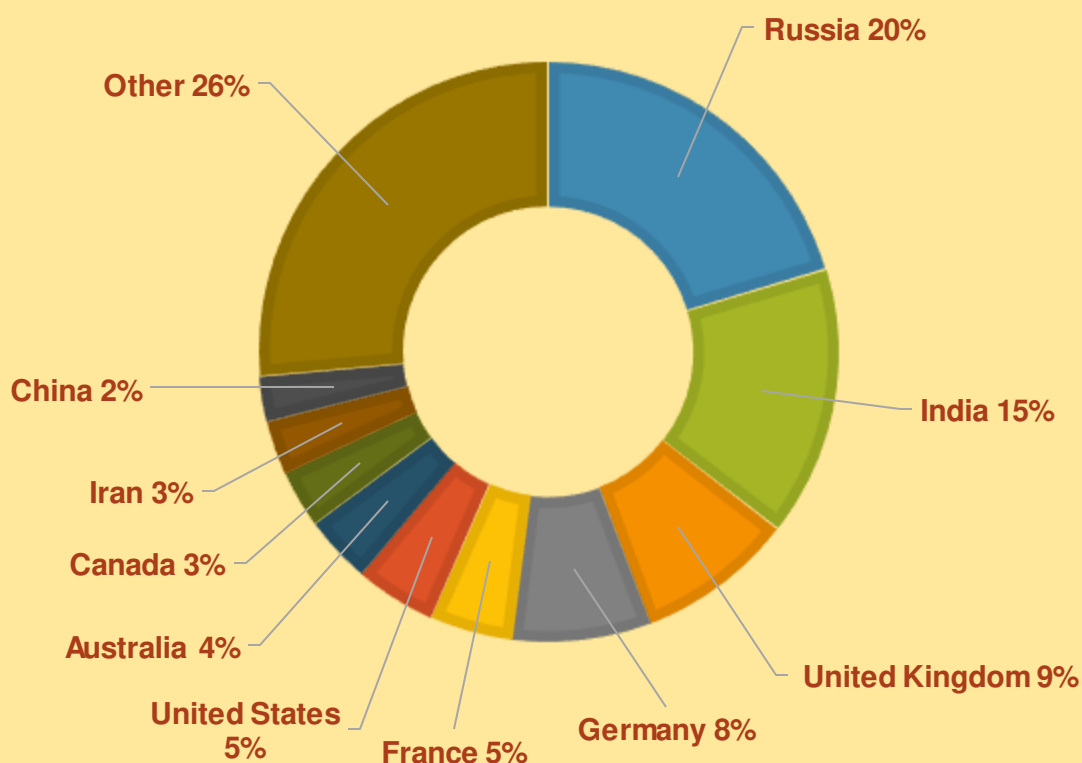
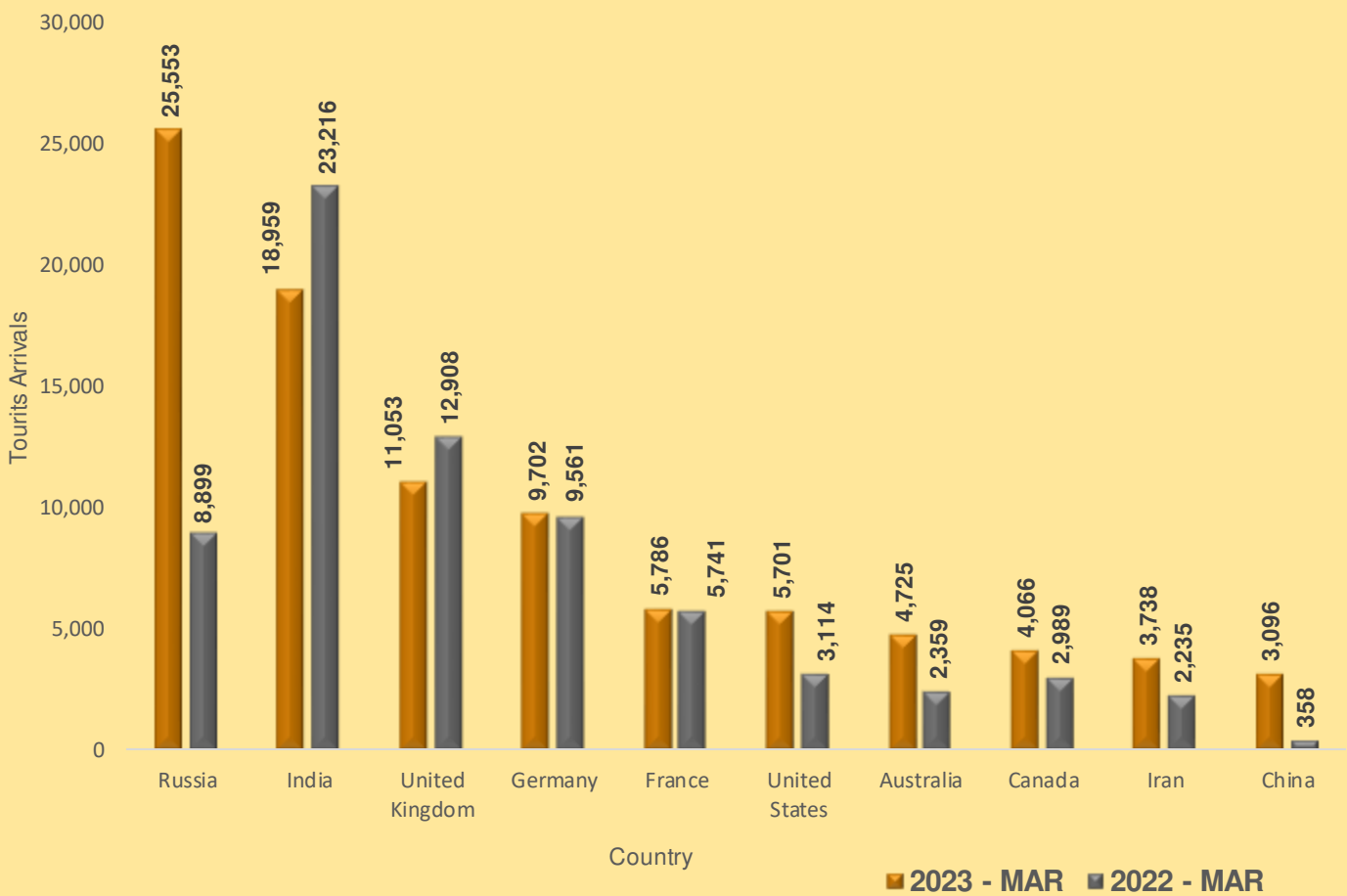




Table 2. Top ten source markets to Sri Lanka, March 2023

Rank	Country of Residence	Tourist Arrivals (March 2023)			Tourist Arrivals (March 2022)
		By Air	By Sea	Total	
1	Russian Federation	25,553	0	25,553	8,899
2	India	18,959	0	18,959	23,216
3	United Kingdom	10,990	63	11,053	12,908
4	Germany	9,688	14	9,702	9,561
5	France	5,778	8	5,786	5,741
6	United States	3,557	2,144	5,701	3,114
7	Australia	4,682	43	4,725	2,359
8	Canada	3,702	364	4,066	2,989
9	Iran	3,738	0	3,738	2,235
10	China	3,094	2	3,096	358

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





Top ten source markets January to March 2023

Sri Lanka's primary international tourist-generating markets from January to March of this year were the Russian Federation, India, the United Kingdom, Germany, and France. During this period, there was an increase in tourist arrivals from Israel (76.3%), Canada (64.1%), the United States (58.5%), Australia (67.7%), and Russia (111%) in comparison to the same period in 2022. However, it is worth noting that tourists from the United Kingdom and India recorded a decrease of 9.3% and 2.7%, respectively, during the January to March 2023 period compared to the same period in 2022..

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ March 2023)	Tourist Arrivals (Jan ~ March 2022)
1	Russian Federation	79,891	37,717
2	India	46,432	47,711
3	United Kingdom	28,111	30,992
4	Germany	25,849	22,680
5	France	16,744	15,056
6	Australia	11,506	6,861
7	Canada	10,854	6,613
8	United States	10,780	6,798
9	Israel	5,821	3,301
10	Maldives	5,795	5,843
	Others	93,896	101,762
	Total	335,679	285,334

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

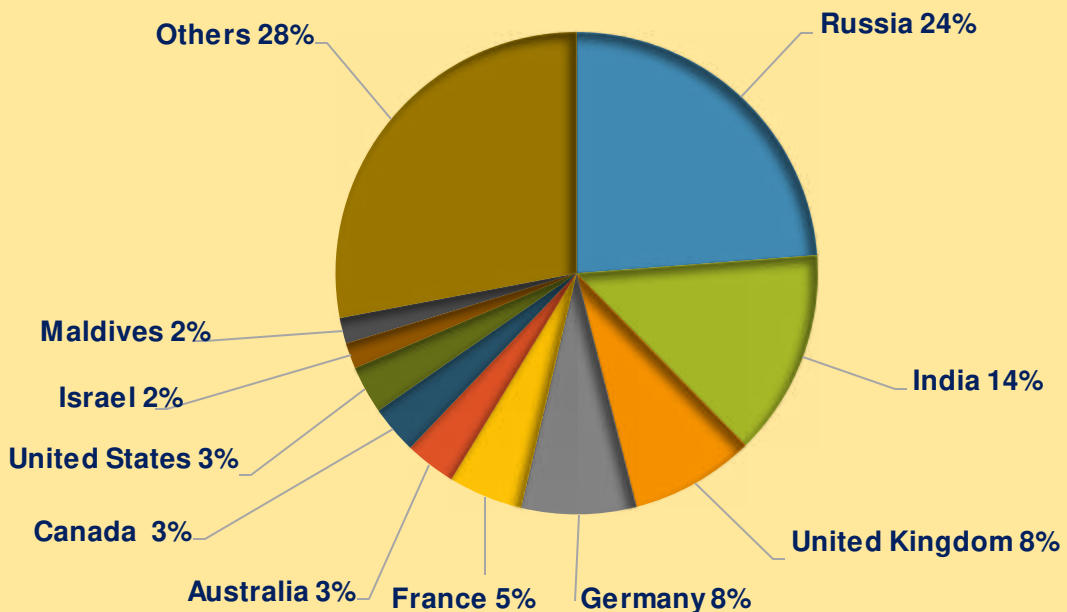
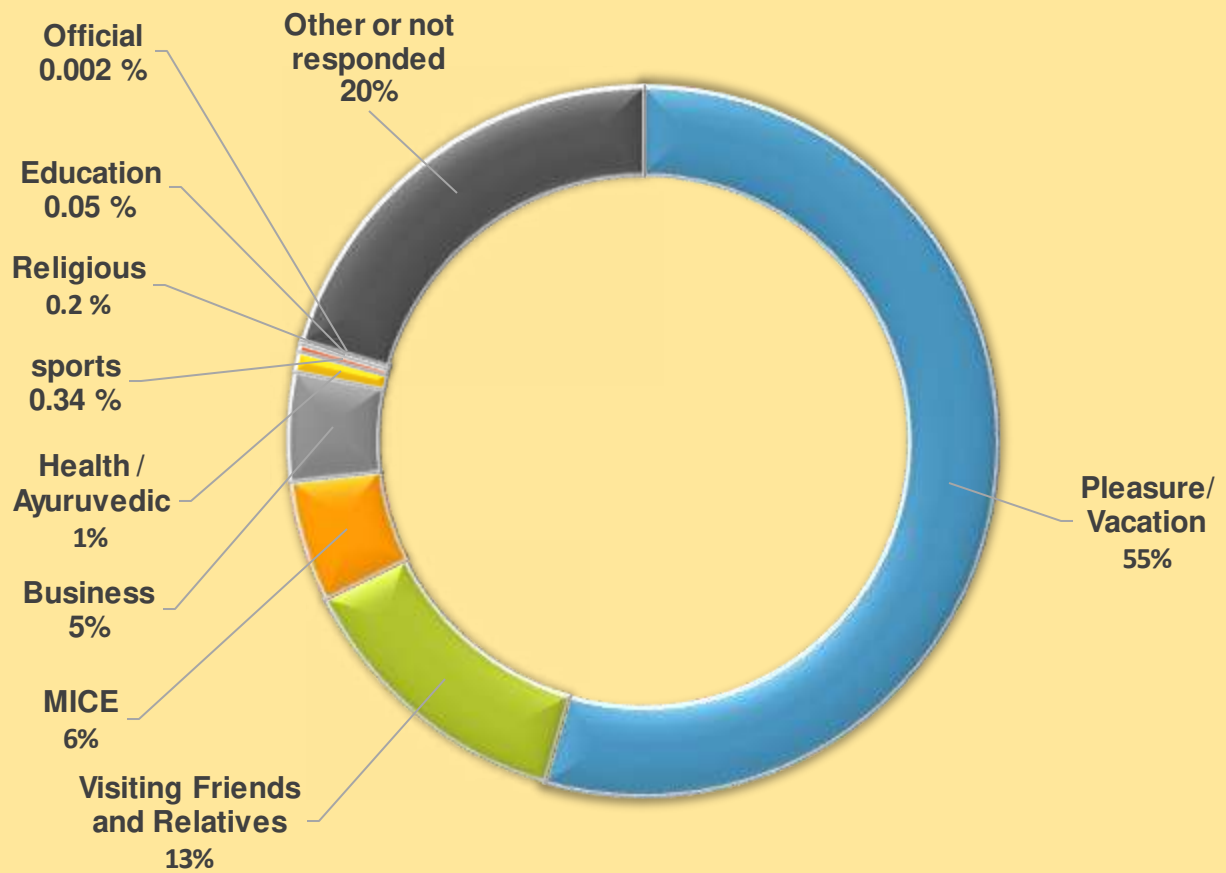


Chart 5 : Purpose of visit



International tourist arrivals by country of residence

	March 2023			Tourist Arrivals Mar. 2022	% Change Mar. (23/22) 2023	Total Tourist Arrivals up to Mar 2023	Total Tourist Arrivals up to Mar 2022	% Change up to Mar. (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
AMERICAS	7,724	2,532	10,256	6,428	59.55	22,781	14,146	61.04
North America	7,328	2,519	9,847	6,146	60.22	21,773	13,508	61.19
Canada	3,702	364	4,066	2,989	36.03	10,854	6,613	64.13
Mexico	69	11	80	43	86.05	139	97	43.30
United States	3,557	2,144	5,701	3,114	83.08	10,780	6,798	58.58
Carribbean & Central America	79	4	83	39	112.82	176	103	70.87
Costa Rica	8	0	8	7	14.29	18	22	(18.18)
Jamaica	4	0	4	4	0	06	6	0
Others	67	4	71	28	153.57	152	75	102.67
South America	317	9	326	243	34.16	832	535	55.51
Argentina	91	3	94	38	147.37	213	92	131.52
Brazil	106	6	112	87	28.74	296	184	60.87
Chile	27	0	27	30	(10.00)	98	73	34.25
Colombia	46	0	46	40	15.00	120	88	36.36
Others	47	0	47	48	(2.08)	105	98	7.14
AFRICA	619	3	622	796	(21.86)	1,499	1,755	(14.59)
North Africa	173	0	173	371	(53.37)	475	855	(44.44)
Morocco	58	0	58	90	(35.56)	143	180	(20.56)
Sudan	52	0	52	156	(66.67)	150	454	(66.69)
Others	63	0	63	125	(49.60)	182	221	(17.65)
Sub-Saharan Africa	446	3	449	425	5.65	1,024	900	13.78
Kenya	51	0	51	42	21.43	114	80	42.50
Mauritius	28	0	28	9	211.11	68	30	126.67
Nigeria	3	0	3	3	0.00	15	11	36.36
South Africa	263	2	265	290	(8.62)	531	524	1.34
Others	101	1	102	81	25.93	296	255	16.08



Monthly Tourist Arrivals Report – March 2023

	March 2023 Tourist Arrivals			Tourist Arrivals Mar . 2022	% Change Mar . (23/22)	Total Tourist Arrivals up to Mar 2023	Total Tourist Arrivals up to Mar 2022	% Change up to Mar. (23/22)
	By Air	By Sea	Total					
ASIA & PACIFIC	38,819	66	38,885	34,113	13.99	91,429	72,506	26.10
North East Asia	4,856	5	4,861	819	493.53	10,265	1,818	464.63
China	3,094	2	3,096	358	764.80	5,466	850	543.06
Japan	1,041	1	1,042	226	361.06	2,760	440	527.27
South Korea	478	1	479	200	139.50	1,437	421	241.33
Taiwan	236	1	237	35	577.14	581	71	718.31
Others	7	0	7	0	0	21	36	(41.67)
South East Asia	2,499	4	2,503	1,402	78.53	6,214	2,952	110.50
Cambodia	47	0	47	2	-	135	45	200.00
Indonesia	133	0	133	112	18.75	446	268	66.42
Malaysia	676	0	676	317	113.25	1,829	623	193.58
Myanmar	73	0	73	19	284.21	144	58	148.28
Philippines	327	2	329	256	28.52	779	522	49.23
Singapore	636	0	636	489	30.06	1,536	1,001	53.45
Thailand	306	2	308	156	97.44	797	314	153.82
Vietnam	284	0	284	46	517.39	504	103	389.32
Others	17	0	17	5	240.00	44	18	144.44
Oceania	5,237	57	5,294	2,616	102.37	12,835	7,367	74.22
Australia	4,682	43	4,725	2,359	100.30	11,506	6,861	67.70
New Zealand	529	14	543	246	120.73	1,283	489	162.37
Others	26	0	26	11	136.36	46	17	170.59
South Asia	26,227	0	26,227	29,276	(10.41)	62,115	60,369	2.89
Afghanistan	1	0	1	16	(93.75)	12	18	(33.33)
Bangladesh	612	0	612	451	35.70	1,860	1,012	83.79
Bhutan	24	0	24	6	300.00	75	47	59.57
India	18,959	0	18,959	23,216	(18.34)	46,432	47,711	(2.68)
Iran	3,738	0	3,738	2,235	67.25	4,964	2,798	77.41
Maldives	1,774	0	1,774	1,910	(7.12)	5,795	5,843	(0.82)
Nepal	295	0	295	186	58.60	834	383	117.75
Pakistan	824	0	824	1,256	(34.39)	2,143	2,557	(16.19)
EUROPE	73,802	120	73,922	61,830	19.56	214,734	189,131	13.54
Northern Europe	13,801	78	13,879	16,533	(16.05)	37,150	40,668	(9.46)
Denmark	892	3	895	1,187	(24.59)	3,086	3,417	(10.72)
Finland	173	0	173	181	(4.41)	634	750	(18.29)
Norway	646	2	648	768	(15.62)	1,913	1,884	(1.53)
Sweden	626	5	631	725	(12.97)	2,338	2,226	5.03
United Kingdom	10,990	63	11,053	12,908	(14.37)	28,111	30,992	(9.30)
Others	474	5	479	764	(37.30)	1,068	1,399	(23.65)



	March 2023 Tourist Arrivals			Tourist Arrivals Mar . 2022	% Change Mar . (23/22)	Total Tourist Arrivals up to Mar. 2023	Total Tourist Arrivals up to Mar. 2022	% Change up to Mar. (23/22)
	By Air	By Sea	Total					
Western Europe	20,333	29	20,362	19,648	3.63	57,396	50,141	14.47
Austria	871	1	872	887	(1.69)	2,762	2,729	1.21
Belgium	722	0	722	761	(5.12)	2,093	1,876	11.57
France	5,778	8	5,786	5,741	0.78	16,744	15,056	11.21
Germany	9,688	14	9,702	9,561	1.47	25,849	22,680	13.97
Netherlands	1,569	4	1,573	1,422	10.62	4,572	3,795	20.47
Switzerland	1,660	0	1,660	1,243	33.55	5,241	3,924	33.56
Others	45	2	47	33	42.42	135	81	66.67
Central/ Eastern Europe	34,383	7	34,390	21,661	58.76	103,856	87,895	18.16
Belarus	1,399	0	1,399	515	171.65	3,847	2,074	85.49
Czech Republic	1,287	0	1,287	1,802	(28.58)	3,453	5,031	(31.37)
Estonia	197	0	197	210	(6.19)	572	680	(15.88)
Hungary	401	2	403	508	(20.67)	1,208	1,435	(15.82)
Kazakhstan	972	0	972	2,598	(62.59)	1,770	7,460	(76.27)
Lithuania	359	1	360	466	(22.75)	934	1,373	(31.97)
Poland	1,503	4	1,507	3,315	(54.54)	3,894	10,815	(63.99)
Romania	340	0	340	517	(34.24)	1,054	1,821	(42.12)
Russia	25,553	0	25,553	8,899	187.14	79,891	37,717	111.82
Slovakia	610	0	610	462	32.03	1,476	1,340	10.15
Ukraine	516	0	516	401	28.68	1,962	13,463	(85.43)
Others	1,246	0	1,246	1,968	(36.69)	3,795	4,686	(19.01)
Southern/ Mediterranean Europe	5,285	6	5,291	3,988	32.67	16,332	10,427	56.63
Greece	143	0	143	102	40.20	457	330	38.48
Italy	1,270	2	1,272	730	74.25	4,158	1,786	132.81
Portugal	297	2	299	341	(12.32)	797	704	13.21
Spain	1,123	2	1,125	1,112	1.17	2,752	2,453	12.19
Turkey	227	0	227	290	(21.72)	835	630	32.54
Israel	1,765	0	1,765	1,007	75.27	5,821	3,301	76.34
Others	460	0	460	406	13.30	1,512	1,223	23.63
MIDDLE EAST	1,810	0	1,810	3,333	(45.69)	5,236	7,796	(32.84)
Bahrain	56	0	56	80	(30.00)	225	188	19.68
Egypt	185	0	185	445	(58.43)	553	1,115	(50.40)
Iraq	64	0	64	236	(72.88)	219	479	(54.28)
Jordan	245	0	245	363	(32.51)	733	817	(10.28)
Kuwait	101	0	101	131	(22.90)	482	371	29.92
Lebanon	206	0	206	200	3.00	505	440	14.77
Oman	63	0	63	93	(32.26)	475	321	47.98
Qatar	67	0	67	53	26.42	147	74	98.65
Saudi Arabia	653	0	653	1,397	(53.26)	1,358	3,425	(60.35)
United Arab Emirates	115	0	115	240	(52.08)	354	357	(0.84)
Others	55	0	55	95	(42.11)	185	209	(11.48)
TOTAL	122,774	2,721	125,495	106,500	17.84	335,679	285,334	17.64



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

The importance of air connectivity to the Sri Lankan tourism industry is evident from the analysis of departure airports. According to Chart 6, 39% of tourists had departed from airports in Dubai, Doha, and Chennai. Among the airlines, Sri Lankan Airlines, Emirates, and Qatar Airways were the preferred choices, collectively serving 54% of the tourists arriving in Sri Lanka. Notably, Dubai emerged as the top departure airport, accounting for 18% of departures, while Sri Lankan Airlines was the primary airline with a share of 31%.

Chart 6. Main last departure airports to Sri Lanka, March 2023

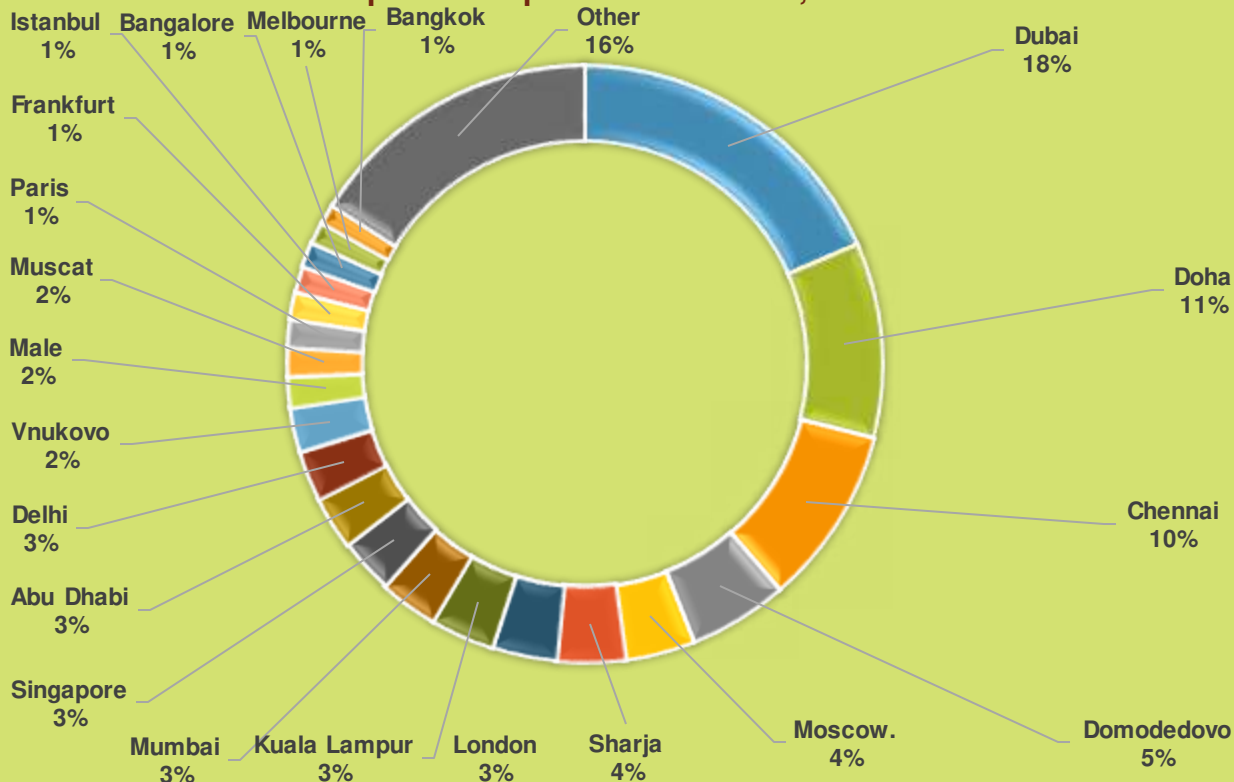
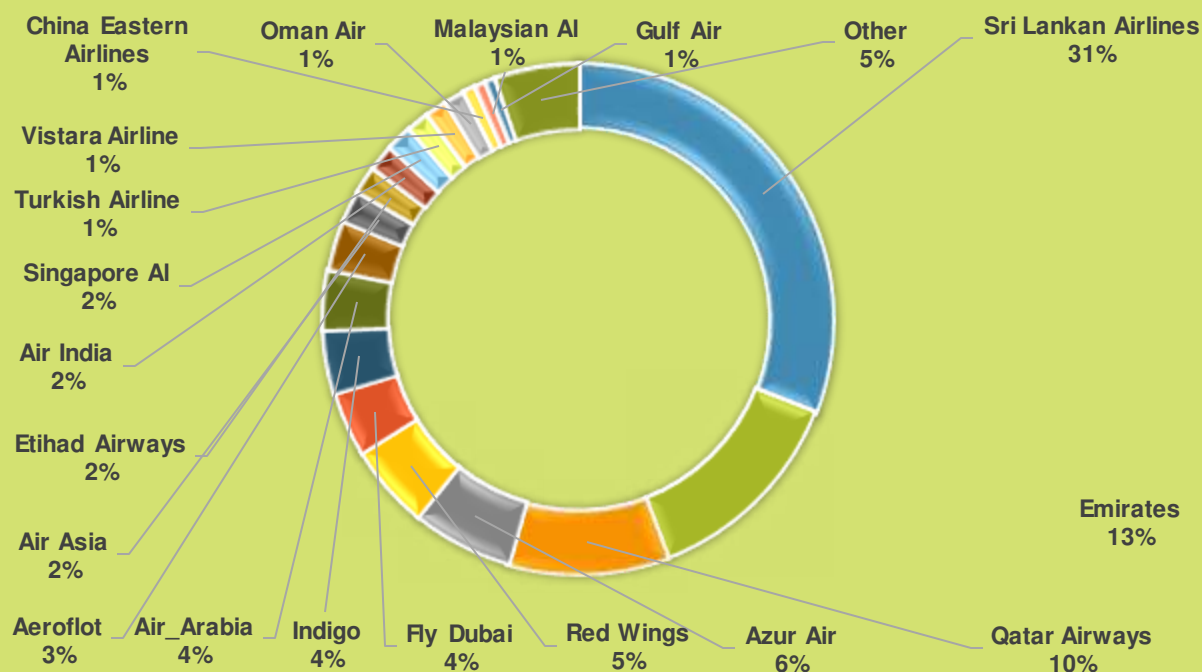


Chart 7. Main airlines to Sri Lanka, March 2023





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

March 2023

The data indicates that tourists visiting Sri Lanka tend to choose different last departure airports and airlines depending on their top markets. For instance, Russian tourists frequently opt for Azur Air, Red Wings, and Aeroflot, while Indian tourists tend to go for Sri Lankan Airlines and IndiGo. Meanwhile, Sri Lankan Airlines is a popular choice for tourists from Germany, the United Kingdom, Australia, the United States, China, and Canada. The data also highlights that Iranian tourists favour Air Arabia & Fly Dubai, with Dubai and Sharjah serving as the main last departure airports. This underscores the significance of destination accessibility in promoting tourism.

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

Country	Dubai	Chennai	Doha	Domodedovo	London	Moscow.	Mumbai	Sharja	Delhi	Vnukovo	Kuala Lumpur	Singapore	Melbourne	Abu Dhabi	Paris	Bangalore	Frankfurt	Muscat	Tyumen	Other	Total
Russian Federation	2,701	340	449	6,155	17	4,640	20	1,848	90	2,809	454	30	3	658	4	17	8	262	1,165	3,883	25,553
India	756	9,424	77	0	16	0	2,926	55	2,266	0	61	116	10	29	2	1,169	0	45	0	2,007	18,959
United Kingdom	3,024	358	1,498	0	3,783	0	139	66	145	0	258	185	59	320	24	95	8	119	0	972	11,053
Germany	2,576	195	2,916	1	109	7	278	16	135	1	198	82	17	406	83	129	1,363	491	0	699	9,702
France	2,171	123	644	0	97	1	130	9	81	0	125	55	6	259	1,384	29	22	187	0	463	5,786
United States	483	233	873	2	81	0	96	31	111	0	128	217	6	146	24	47	6	12	0	3,205	5,701
Australia	182	131	30	0	14	0	19	5	77	0	334	1,318	2,013	27	3	6	2	8	0	556	4,725
Canada	654	330	746	0	777	2	133	23	48	0	90	114	18	81	167	71	107	15	0	690	4,066
Iran	1,500	6	490	0	0	1	0	1,451	0	0	6	3	4	2	1	1	0	205	0	68	3,738
China	104	22	22	0	6	0	6	5	4	0	689	205	4	11	0	0	1	4	0	2,013	3,096

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

Country	Sri Lankan Airlinesw	Emirates	Azur Air	Qatar Airways	Red Wings	IndiGo	Aeroflot	Air_Arabia	Fly Dubai	Air India	Vistara Airline	Air Asia	Singapore Airline	Oman Air	Etihad Airways	China Eastern Airlines	Other	Total
Russian Federation	4.21	5.75	30.13	1.69	24.09	1.08	15.09	7.23	4.26	0.13	0.07	1.40	0.02	0.82	0.65	0.01	3.37	100.00
India	59.35	2.03	0.00	0.30	0.00	20.31	0.00	0.29	0.38	7.83	7.67	0.08	0.26	0.09	0.06	0.00	1.34	100.00
United Kingdom	46.96	23.92	0.00	12.80	0.00	0.98	0.00	0.60	1.49	0.58	0.58	1.50	0.67	1.01	2.31	0.00	6.60	100.00
Germany	29.13	24.70	0.16	28.91	0.01	0.99	0.07	0.16	1.47	0.42	0.23	1.64	0.32	4.98	2.24	0.05	4.51	100.00
France	33.67	35.22	0.05	10.40	0.00	0.71	0.02	0.16	1.81	0.60	0.24	1.49	0.29	3.21	2.89	0.02	9.21	100.00
United States	16.86	6.82	0.04	14.21	0.04	1.54	0.00	0.54	1.03	1.35	0.95	1.32	2.49	0.16	2.03	0.04	50.59	100.00
Australia	63.62	2.84	0.00	0.61	0.00	0.76	0.00	0.11	0.21	0.70	0.08	2.07	19.77	0.17	0.32	0.00	8.74	100.00
Canada	45.03	13.99	0.00	17.78	0.00	1.30	0.05	0.57	0.93	1.55	0.54	1.33	0.81	0.30	1.45	0.15	14.22	100.00
Iran	2.54	11.64	0.00	13.06	0.00	0.08	0.03	38.82	27.96	0.03	0.00	0.05	0.00	0.08	0.05	0.00	5.67	100.00
China	39.66	2.39	0.03	0.68	0.00	0.55	0.00	0.16	0.39	0.10	0.06	18.28	4.10	0.13	0.29	30.68	2.49	100.00



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