



Monthly Tourist Arrivals Report:

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

October 2021

Sri Lanka Tourism Development Authority



Introduction

The following document provides a synthesis of the most recent October, 2021 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 4 October 2021, 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 October 2021, was 22,771. A modest improvement in the month of October can be noticed following the sharp contraction in arrivals after the month of April. This reflects the improvement in international arrivals 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. As of 31st October 2021, 60,695 tourists had visited Sri Lanka for this year. It is a decline of 88% over last year when 507,311 tourists had visited the country from January to 18th March.

The largest source markets recorded for the month of October 2021 were India, United Kingdom, Pakistan, Russia and Germany.

Table 1. Monthly tourist arrivals, October 2020 & 2021, and percentage change

Month	2020	2021	% change 2021/20
January	228,434	1,682	(99.3)
February	207,507	3,366	(98.4)
March	71,370	4,581	(93.6)
April	0	4,168	-
May	0	1,497	-
June	0	1,614	-
July	0	2,429	-
August	0	5,040	-
September	0	13,547	-
October	0	22,771	-
November	0	-	-
December	393	-	-
Total (Jan – October)	507,311	60,695	(88.0)
TOTAL	507,704	-	-



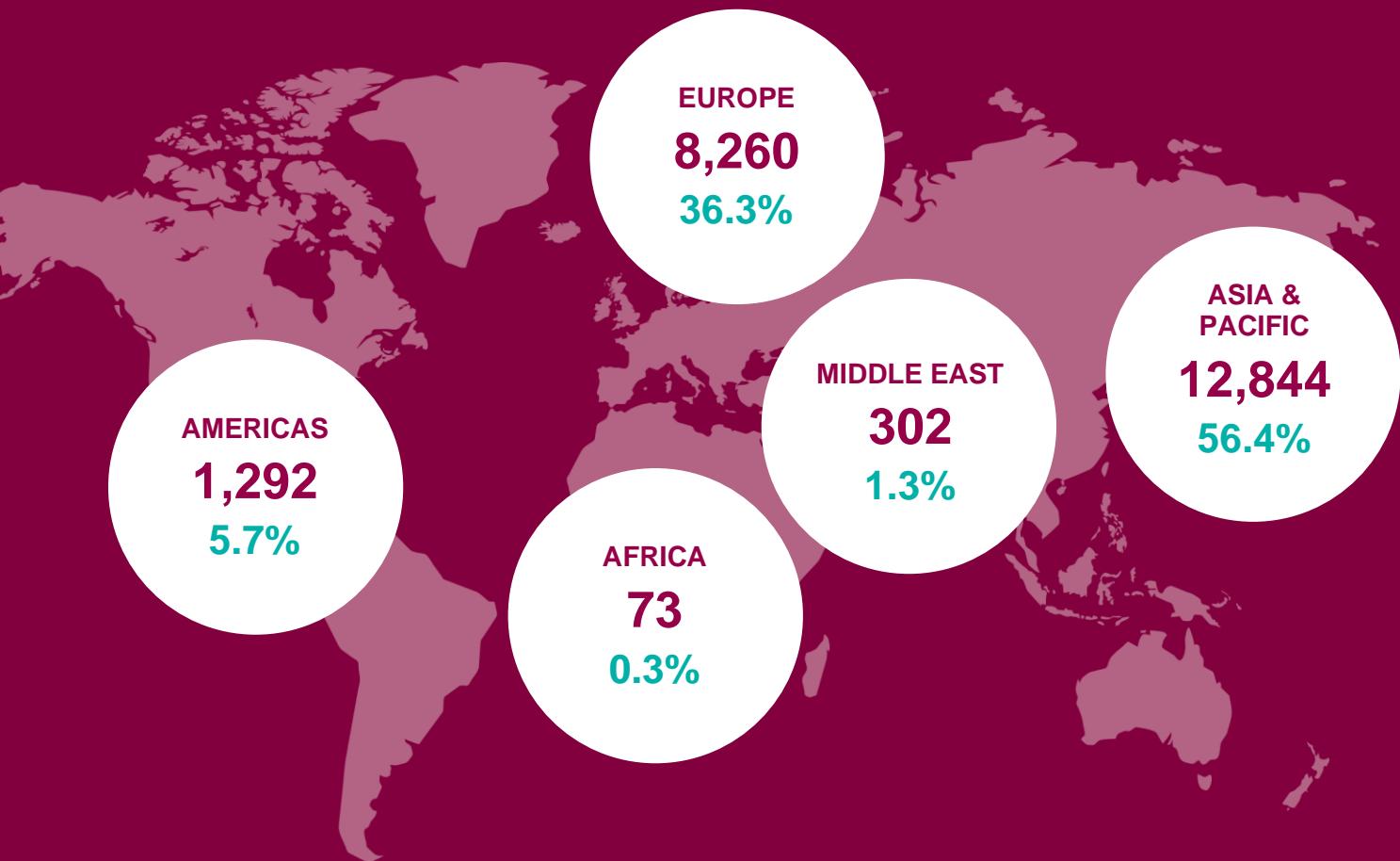
Tourist Arrivals | October 2021

22,771



Tourist arrivals by region and percentage share October 2021

Map 1.Tourist arrivals by region and percentage share



Asia and Pacific became the largest source of tourist traffic to Sri Lanka with 56.4% of the total traffic received in October 2021. Given the adverse impact of COVID-19 on the region, this can be considered as significant growth. Geographic proximity being one of the main drivers of destination choice now, pent up demand especially from countries such as China, Indonesia, Bangladesh, Pakistan, and India is likely to have driven this growth momentum.

Europe accounted for 36.3% of the total traffic while the Americas accounted for 5.7%. In comparison to October last year all regions have recorded a decline in arrivals. However, as recovery continues an increase in arrivals could be anticipated as keen enthusiasm and readiness to travel and explore the world again is demonstrated by travellers, enabled by access to vaccines and easing of border restrictions.



Top primary markets and top potential markets October 2021

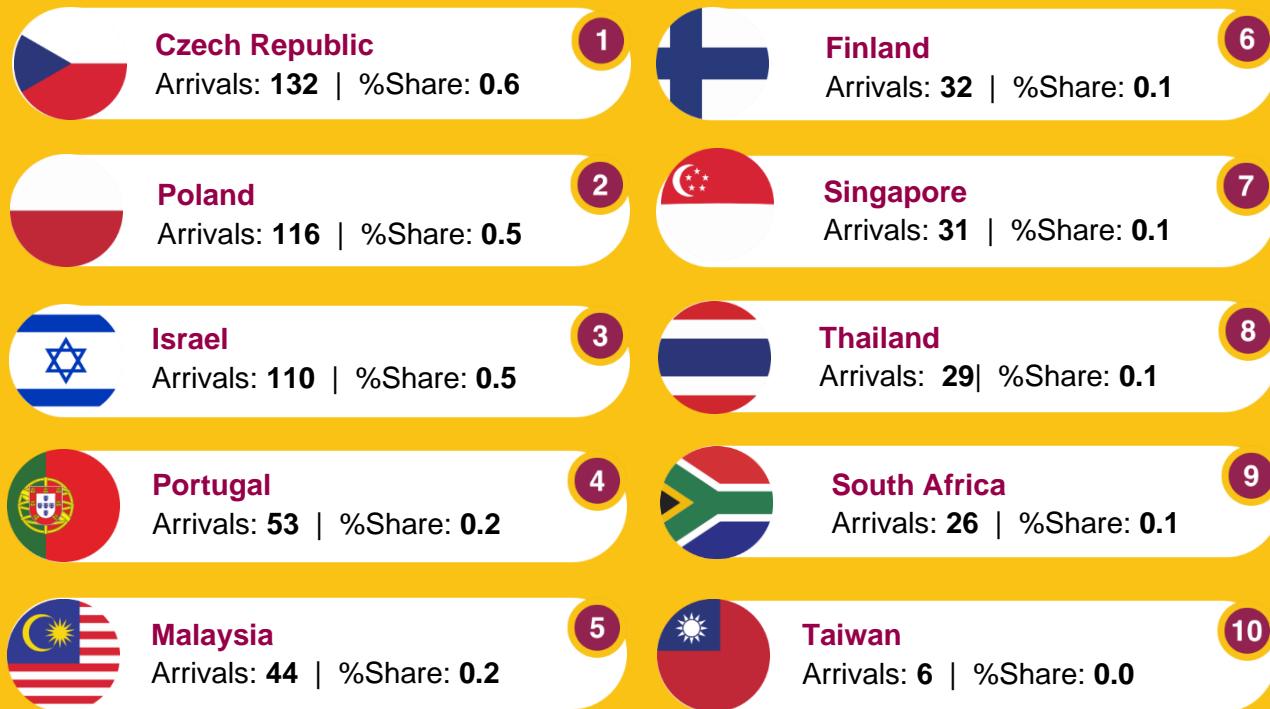
Top primary markets



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).



Potential primary market



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).



Destination Promotion in New Normal

The gradual curtailment of COVID 19 and the reopening of borders has increased hope for a gradual return of international tourism. Enthusiastic travellers bound by the lockdowns that confined them for extended periods are keen to explore the world again. Yet the visitor experience in many destinations has changed and various hurdles remain including decreased flights, quarantines and social distancing restrictions.

However, tourism promotion in this post-COVID period will never be the same again. Researchers point out that although promotion will be necessary for tourism markets to awaken from the lethargy after the initial impact, marketing, communications and travel trade engagement should not be the same as before. The strategies of tourist destination organizations will not only be based on promotion, but also on reconfiguring the offer in the light of the new social reality resulting from the COVID-19 (Toubes, et al., 2021). While certain destination organizations have reduced or postponed their marketing efforts there were others who have found ways of engaging potential customers while they are in lockdowns. However, the fluctuations in demand and supply caused by the reopening of borders and related factors have necessitated the destinations to readjust their marketing strategies as per the changing traveller needs and behaviours. In encountering this challenge successfully, Google and a leading global management consultancy have developed a five 'R' approach to guide DMOs (Alassaf and Bergman, 2020).

1. Reassess their offerings and value proposition in light of evolving traveler preferences, needs, and concerns.
2. Reassure travelers on the safety of travel to their chosen destination by addressing their health concerns.
3. Raise awareness of the destination, including added safety measures and local government regulations, to inspire consumers.
4. Remove barriers in converting consumers to travelers by making the case for traveling with conscientious health and safety measures in place.
5. Revive spend in the local economy by supporting tourism.

Having identified the transformations occurring in the industry Sri Lanka tourism too has modified its marketing efforts to include a global tourism campaign, winter campaign promotions through advertising and social media and travel trade promotional campaigns. Further recent accolades and recognitions received for Sri Lanka, such as being one of the top wellness tourism destinations by the Global Wellness Institute, best countries to explore for nature lovers by Times of India and best countries to travel by Conde Nast Traveler Readers' Choice awards will add value and supplement the ongoing promotional efforts. It is anticipated that the gradual developments in vaccination that will lead to curtailment of the pandemic will progressively strengthen traveller confidence leading to a moderate rebound in international arrivals in the remaining months of the year.

References

Toubes, D.R.; Araújo Vila, N.; Fraiz Brea, J.A. Changes in Consumption Patterns and Tourist Promotion after the COVID-19 Pandemic. *J. Theor. Appl. Electron. Commer. Res.* 2021, 16, 1332–1352.

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Top ten source markets

October, 2021

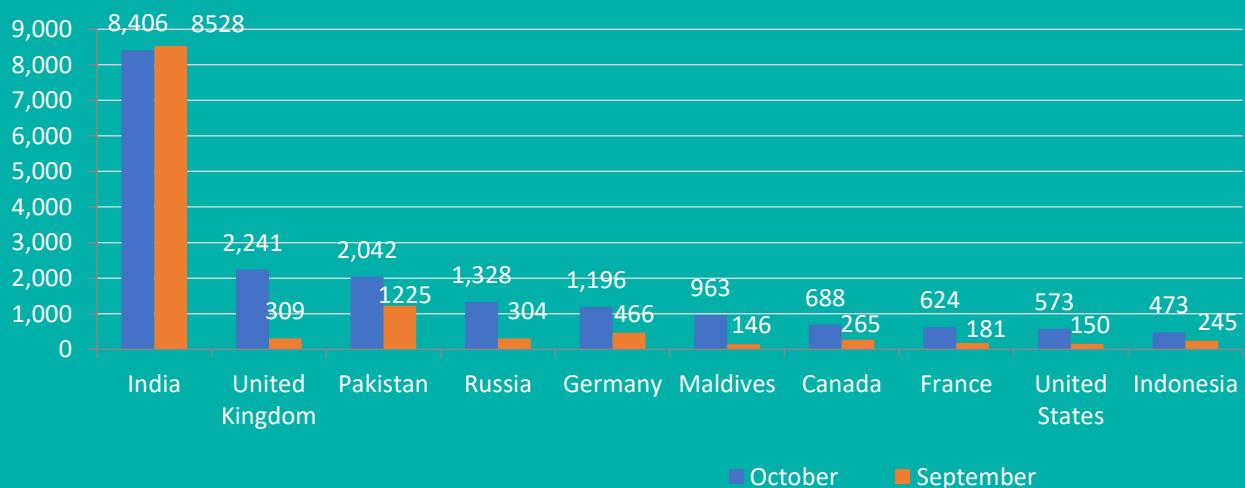
India, United Kingdom, Pakistan, Russia and Germany were Sri Lanka's top five international tourist generating markets for the month of October this year. India was the largest source of tourist visits to Sri Lanka with 37% of the total traffic received in October. The United Kingdom and Pakistan accounted for 10% and 9% of the total traffic respectively. The growth in arrivals from countries in the Americas, and Western, Central & Eastern Europe, suggests a slight revitalization of leisure tourism, potentially enabled by factors such as the gradual improvement of traveller confidence, the lifting of travel restrictions, the roll-out of COVID-19 vaccine programs,

the North American and Western Europe summer holiday period, and various accolades received to Sri Lanka tourism. Further, the desire to visit friends and relatives (VFR) could have highly motivated travel consumers, especially from Canada, the United Kingdom and Malaysia to visit Sri Lanka during this period. The presence of Pakistan and India in the top source markets is noteworthy. Easing of border restrictions, the gradual containment of the pandemic and promotions on air tickets especially for Indian tourists could be the likely factors that influenced the growth in arrivals.

Table 2. Top ten source markets to Sri Lanka, October 2021

Rank	Country of Residence	Tourist Arrivals (October 2021)			Tourist Arrivals (October 2020)
		By Air	By Sea	Total	
1	India	8,406	-	8,406	-
2	United Kingdom	2,241	-	2,241	-
3	Pakistan	2,042	-	2,042	-
4	Russia	1,328	-	1,328	-
5	Germany	1,196	-	1,196	-
6	Maldives	963	-	963	-
7	Canada	688	-	688	-
8	France	624	-	624	-
9	United States	573	-	573	-
10	Indonesia	473	-	473	-

Chart 1. Comparison of arrivals from top ten markets to Sri Lanka, Oct /Sep 2021





Top ten source markets

January – October 2021

India, United Kingdom, Germany, Kazakhstan and Ukraine were Sri Lanka's top five international tourist-generating markets from January to October this year. All the countries, except Kazakhstan, recorded declines in arrivals in comparison to the same period in 2020, likely due to the persistence of the pandemic situation and potential new COVID-19 outbreaks around the globe. It is noteworthy that total arrivals up to October from Kazakhstan had recorded a growth in comparison to total arrivals up to October 2020, likely owing to the pilot project carried out to revive the tourism industry following a 10-month pandemic-induced closure.

Table 3. Top ten markets to Sri Lanka, January to October 2020 & 2021 and percentage change

Rank	Country of Residence	Tourist Arrivals (Jan-October 2021)	Tourist Arrivals (Jan-October 2020)	%Change (Jan-October 2021 & Jan-October 2020)
1	India	18,466	89,357	-88.7
2	United Kingdom	4,383	55,455	-96.1
3	Germany	3,900	34,507	-92.2
4	Kazakhstan	3,207	2,333	37.2
5	Ukraine	2,910	16,776	-83.7
6	Russia	2,581	49,397	-97.5
7	Canada	2,213	12,436	-87.7
8	France	2,081	24,838	-94.1
9	United States	2,062	16,842	-91.2
10	China	1,958	26,147	-93.2

Chart 2. Top ten source markets to Sri Lanka, January – October, 2021

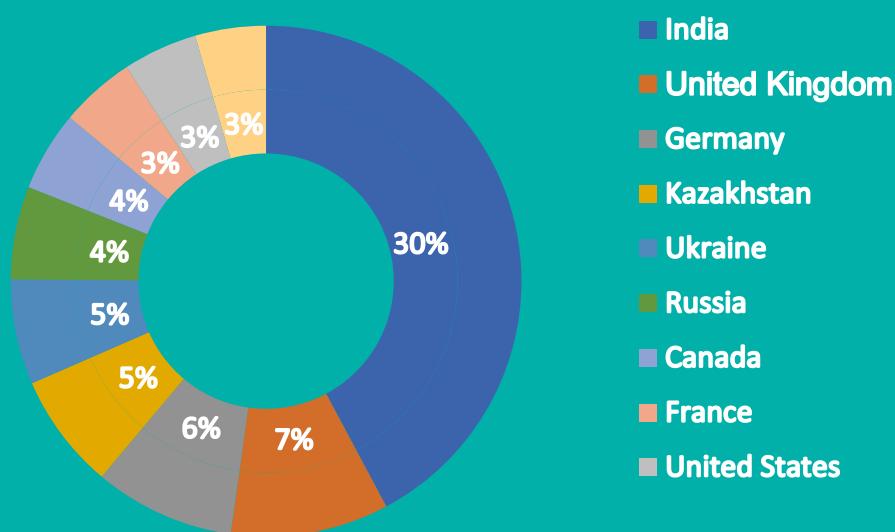
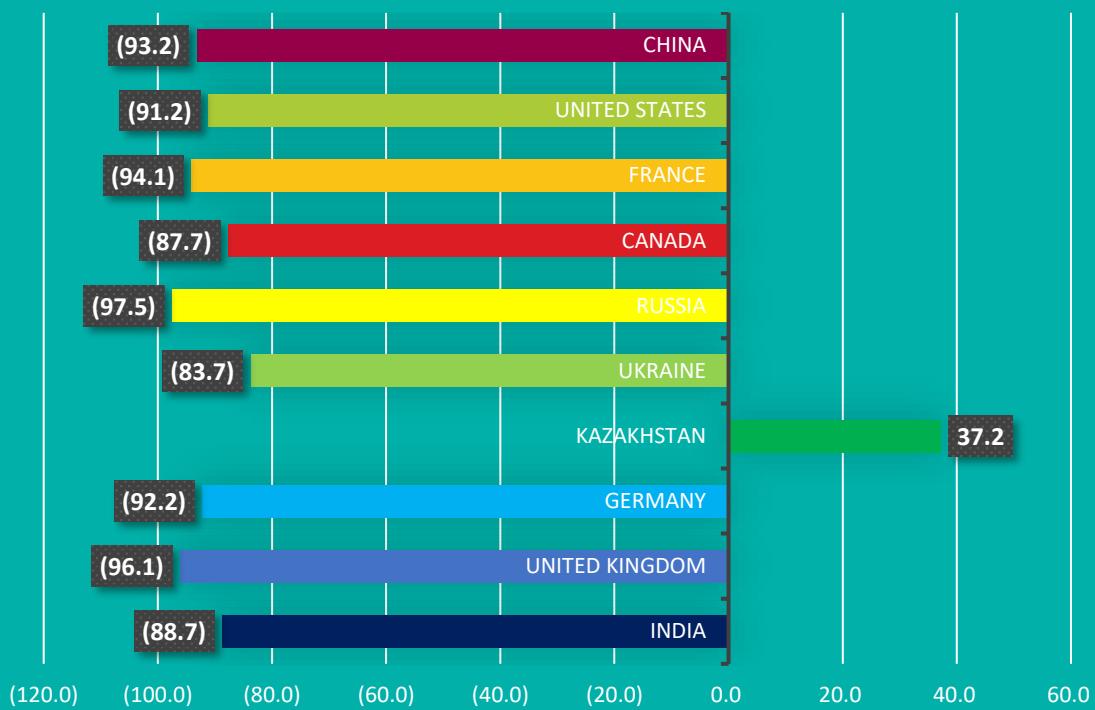




Chart 3. Top ten source markets, percentage changes, January–October 2021 & January–October 2020





International tourist arrivals by country of residence

	October-21			Total Tourist Arrivals October 2020	% Change October (20/21)	Total Tourist Arrivals up to October 2021	Total Tourist Arrivals up to October 2020	% Change up to October (20/21)
	By Air	By Sea	Total					
AMERICAS	1,292	0	1,292	0	-	4,400	31,843	(90.2)
North America	1,271	0	1,271	0	-	4,299	29,627	(89.8)
Canada	688	0	688	0	-	2,213	12,436	(87.7)
Mexico	10	0	10	0	-	24	349	(96.0)
United States	573	0	573	0	-	2,062	16,842	(91.2)
Caribbean & Central America	4	0	4	0	-	27	226	(89.8)
Costa Rica	0	0	0	0	-	0	33	-
Jamaica	1	0	1	0	-	2	25	(96.0)
Others	3	0	3	0	-	25	168	(86.9)
South America	17	0	17	0	-	74	1,990	(97.1)
Argentina	2	0	2	0	-	12	416	(97.6)
Brazil	6	0	6	0	-	31	875	(97.1)
Chile	3	0	3	0	-	4	271	(99.6)
Colombia	4	0	4	0	-	18	201	(93.0)
Others	2	0	2	0	-	9	227	(96.9)
AFRICA	73	0	73	0	-	224	2,880	(94.8)
North Africa	13	0	13	0	-	37	689	(96.5)
Morocco	7	0	7	0	-	14	311	(97.7)
Sudan	1	0	1	0	-	9	143	(94.4)
Others	5	0	5	0	-	14	235	(96.2)
Sub-Saharan Africa	60	0	60	0	-	187	2,191	(94.2)
Kenya	7	0	7	0	-	11	110	(96.4)
Mauritius	3	0	3	0	-	10	170	(95.9)
Nigeria	0	0	0	0	-	3	25	(88.0)
South Africa	26	0	26	0	-	103	1,364	(94.4)
Others	24	0	24	0	-	60	522	(93.1)



	October-21			Total Tourist Arrivals October 2020	% Change October (20/21)	Total Tourist Arrivals up to October 2021	Total Tourist Arrivals up to October 2020	% Change up to October (20/21)					
	Tourist Arrivals												
	By Air	By Sea	Total										
ASIA & PACIFIC	12,844	0	12,844	0	-	29,035	181,154	(91.1)					
North East Asia	309	0	309	0	-	2,216	37,320	(94.9)					
China	182	0	182	0	-	1,958	26,147	(93.2)					
Japan	45	0	45	0	-	130	6,644	(98.7)					
South Korea	76	0	76	0	-	107	2,499	(98.8)					
Taiwan	6	0	6	0	-	21	1,985	(99.2)					
Others	0	0	0	0	-	0	45	-					
South East Asia	660	0	660	0	-	1349	14,927	(95.4)					
Cambodia	2	0	2	0	-	3	372	(99.7)					
Indonesia	473	0	473	0	-	862	1,114	(65.1)					
Malaysia	44	0	44	0	-	68	3,494	(99.3)					
Myanmar	1	0	1	0	-	21	532	(96.2)					
Philippines	76	0	76	0	-	235	4,249	(96.3)					
Singapore	31	0	31	0	-	84	2,545	(97.9)					
Thailand	29	0	29	0	-	56	1,880	(98.6)					
Vietnam	4	0	4	0	-	20	709	(97.7)					
Others	0	0	0	0	-	0	32	-					
Oceania	146	0	146	0	-	436	22,706	(98.7)					
Australia	121	0	121	0	-	352	20,283	(98.9)					
New Zealand	24	0	24	0	-	78	2,324	(97.7)					
Others	1	0	1	0	-	6	99	(94.9)					
South Asia	11,729	0	11,729	0	-	25,034	106,201	(87.5)					
Afghanistan	0	0	0	0	-	9	146	(93.8)					
Bangladesh	273	0	273	0	-	580	1,986	(84.5)					
Bhutan	0	0	0	0	-	2	208	(99.0)					
India	8,406	0	8,406	0	-	18,466	89,357	(88.7)					
Iran	16	0	16	0	-	110	648	(85.5)					
Maldives	963	0	963	0	-	1912	9,407	(89.9)					
Nepal	29	0	29	0	-	51	1,384	(98.4)					
Pakistan	2,042	0	2,042	0	-	3,904	3,065	(39.2)					
EUROPE	8,260	0	8,260	0	-	26,247	281,203	(93.6)					
Northern Europe	2,797	0	2797	0	-	5,669	75,146	(96.2)					
Denmark	159	0	159	0	-	330	4,905	(96.5)					
Finland	32	0	32	0	-	81	2,298	(97.9)					
Norway	212	0	212	0	-	457	3,019	(91.9)					
Sweden	98	0	98	0	-	267	7,061	(97.6)					
United Kingdom	2,241	0	2241	0	-	4,383	55,455	(96.1)					
Others	55	0	55	0	-	151	2,408	(96.0)					



	October-21			Total Tourist Arrivals October 2020	% Change October (20/21)	Total Tourist Arrivals up to October 2021	Total Tourist Arrivals up to October 2020	% Change up to October (20/21)					
	Tourist Arrivals												
	By Air	By Sea	Total										
Western Europe	2,772	0	2,772	0	-	8,469	82,229	(93.1)					
Austria	151	0	151	0	-	408	4,300	(94.0)					
Belgium	152	0	152	0	-	326	3,371	(94.8)					
France	624	0	624	0	-	2,081	24,838	(94.1)					
Germany	1196	0	1196	0	-	3,900	34,507	(92.2)					
Netherlands	242	0	242	0	-	680	8,656	(94.9)					
Switzerland	403	0	403	0	-	1051	6,389	(89.9)					
Others	4	0	4	0	-	23	168	(88.7)					
Central/ Eastern Europe	2,023	0	2,023	0	-	10,234	100,373	(91.8)					
Belarus	36	0	36	0	-	137	2,638	(96.2)					
Czech Republic	132	0	132	0	-	348	7,599	(97.2)					
Estonia	31	0	31	0	-	66	1,185	(97.0)					
Hungary	24	0	24	0	-	60	1,588	(97.7)					
Kazakhstan	7	0	7	0	-	3,207	2,333	(37.2)					
Lithuania	60	0	60	0	-	98	1,054	(96.4)					
Poland	116	0	116	0	-	271	11,908	(98.7)					
Romania	21	0	21	0	-	94	1,724	(95.8)					
Russia	1328	0	1328	0	-	2,581	49,397	(97.5)					
Slovakia	42	0	42	0	-	185	1,513	(90.5)					
Ukraine	168	0	168	0	-	2,910	16,776	(83.7)					
Others	58	0	58	0	-	277	2,658	(91.8)					
Southern/ Mediterranean Europe	668	0	668	0	-	1,875	23,455	(94.9)					
Greece	14	0	14	0	-	44	1,573	(98.1)					
Italy	160	0	160	0	-	440	8,603	(96.7)					
Portugal	53	0	53	0	-	97	1,602	(97.3)					
Spain	269	0	269	0	-	658	3,385	(88.5)					
Turkey	31	0	31	0	-	103	2,121	(96.6)					
Israel	110	0	110	0	-	416	3,556	(91.4)					
Others	31	0	31	0	-	117	2,615	(96.7)					
MIDDLE EAST	302	0	302	0	-	789	10,231	(95.2)					
Bahrain	6	0	6	0	-	37	549	(94.4)					
Egypt	13	0	13	0	-	52	956	(95.9)					
Iraq	39	0	39	0	-	56	138	(87.7)					
Jordan	61	0	61	0	-	176	627	(81.7)					
Kuwait	20	0	20	0	-	34	825	(98.3)					
Lebanon	37	0	37	0	-	169	483	(72.7)					
Oman	27	0	27	0	-	45	1,045	(98.3)					
Qatar	7	0	7	0	-	10	129	(97.7)					
Saudi Arabia	79	0	79	0	-	162	4,755	(98.3)					
United Arab Emirates	5	0	5	0	-	25	352	(94.3)					
Others	8	0	8	0	-	23	372	(96.0)					
TOTAL	22,771	0	22,771	0	-	60,695	507,311	(92.5)					



Main last departure airports and airlines to Sri Lanka, October 2021

An analysis of the last departure airports to Sri Lanka reveals the importance of air connectivity in the tourism industry. As depicted in the below Chart 7, for around 42% of tourists the last airports had been, Doha, Chennai and Dubai. Further, in terms of airlines, Sri Lankan Airlines, Qatar Airways and Emirates were the top airlines, handling 93% of tourists to Sri Lanka.

Chart 4. Main last departure airports to Sri Lanka, October 2021

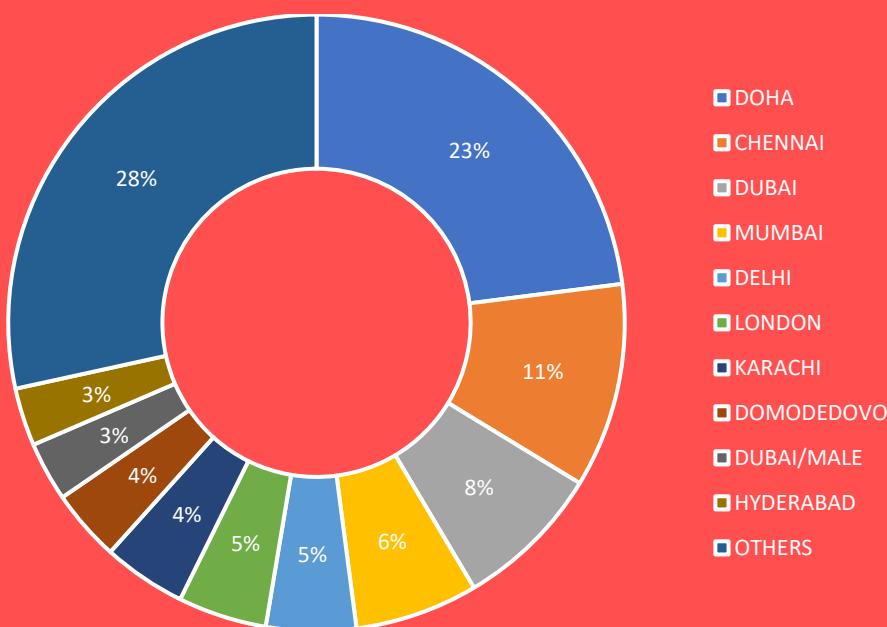
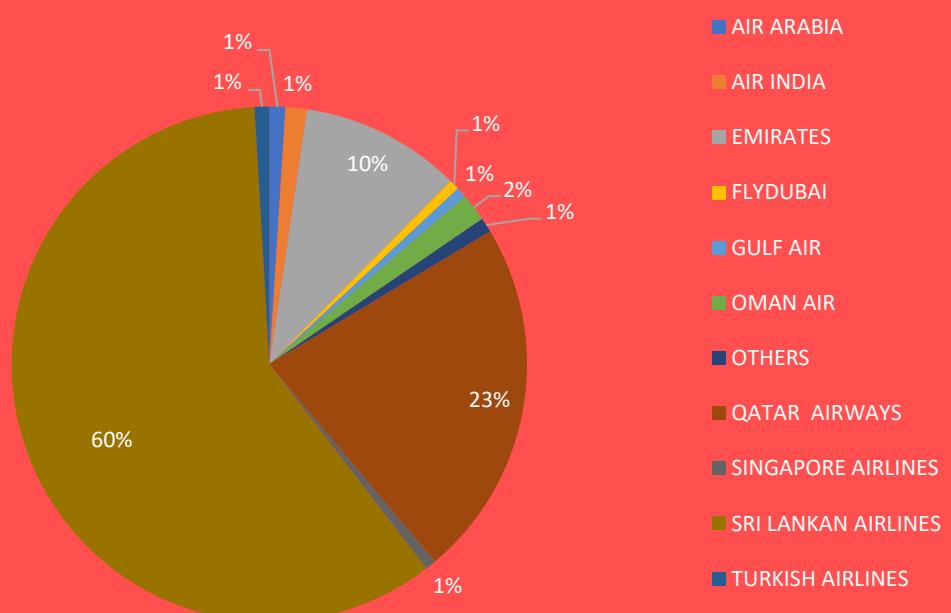


Chart 5. Main airlines to Sri Lanka, October 2021





Top ten markets versus main last departure airports and main airlines to Sri Lanka, October 2021

The below tables depict the main last departure airports and airlines analyzed by top markets to Sri Lanka. The data further hints to the importance of destination accessibility in driving visitation. Establishing direct air access especially to Europe is key to increase tourism and in identifying this, steps are underway to launch direct flights with several airlines such as Aeroflot, Azur Air, Neos, Air France, US-Bangla, Arkia and Swiss Air, commencing from November. It is anticipated that the resumption of flights by Sri Lankan Airlines to Paris from November will further boost the visitation of tourists mainly from the European Region. As depicted in Table 5, 93.7% of Indians have used Sri Lankan Airlines in travelling to Sri Lanka and this could be likely due to the air ticket promotion offered to Indian tourists.

Table 4. Top ten markets vs. main last departure airports to Sri Lanka, October 2021

Top Ten Markets	Number of Passengers																				Total Passengers	
	Bangalore	Chennai	Delhi	Doha	Domodedovo	Dubai	Dubai/Male	Frankfurt	Hyderabad	Jakarta	Karachi	Kochi	Lahore	London	Heathrow UK	Male	Mumbai	Muscat	Tiruchirappalli	Trivandrum	Other Ports	
India	584	2,384	1,056	27	0	117	6	0	678	5	118	281	0	3	0	37	1,428	11	474	360	837	8,406
United Kingdom	7	5	0	848	0	202	65	1	1	2	6	1	1	915	40	21	4	9	1	4	108	2,241
Pakistan	0	0	0	11	0	27	4	0	0	0	863	0	621	0	0	5	0	346	0	0	165	2,042
Russian Federation	0	2	2	336	833	69	16	0	0	0	0	0	0	1	0	20	0	0	0	49	1,328	
Germany	2	5	0	730	0	191	39	131	0	0	0	0	1	21	1	3	1	10	0	0	61	1,196
Maldives	0	2	0	1	0	153	358	0	0	0	0	0	0	0	0	426	0	0	0	4	19	963
Canada	1	6	6	520	0	101	2	0	1	0	0	0	1	23	2	0	3	0	2	0	20	688
France	3	13	1	422	0	87	29	2	0	0	0	4	0	17	5	3	0	2	0	0	36	624
United States	8	6	3	335	1	79	17	0	7	0	6	2	0	4	0	31	13	2	1	0	58	573
Indonesia	0	1	0	4	0	2	1	0	0	455	0	0	0	0	0	2	0	0	0	0	8	473

**Table 5. Top ten markets vs. main airlines to Sri Lanka, October 2021**

Top Ten Markets	Percentage share of the airline											Total Passengers
	Air India	Air Arabia	Emirates	Etihad Airways	Gulf Air	IndiGo	Oman Air	Qatar Airways	Sri Lankan Airlines	Turkish Airlines	Other Airlines	
India	3.4	0.1	1.1	0	0	0.8	0	0.3	94	0	0.5	8,406
United Kingdom	0	0	11	0.1	3.3	0	0.3	38	46	0.2	0.6	2,241
Pakistan	0	5.4	2.5	0.3	1	0	17	0.5	73	0	0.1	2,042
Russian Federation	0.2	2.3	5.8	0	0.6	0	0	25	65	0.2	0.5	1,328
Germany	0	0	18	1.8	1	0	0.8	59	17	1	1.2	1,196
Maldives	0	0	55	0	0	0	0	0.1	45	0	0	963
Canada	0.9	0	13	1.5	0.3	0	0	74	9.4	0.4	0	688
France	0	0.3	18	0	0.8	0	0.2	65	13	2.7	1	624
United States	0.5	0.3	16	1.6	0.2	0	0	53	24	2.1	1.7	573
Indonesia	0	0	0.4	0	0	0	0	0.8	97	0	1.7	473



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