



The Monthly Tourist Arrival Report:

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

September 2021

Sri Lanka Tourism Development Authority



Introduction

The following document provides a synthesis of the most recent September, 2021 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 6 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 “Monthly Tourists Arrivals Report” is a publication by the Research Team at Sri Lanka Tourism Development Authority (SLTDA) that monitors monthly tourist arrivals and trends to provide industry stakeholders with an up-to-date overview of international tourism to Sri Lanka. The statistics in this report are derived from immigration data.

The total number of international tourist arrivals to Sri Lanka during September 2021, was 13,547. A considerable growth in arrivals in the month of September can be observed following the sharp contraction in arrivals after the month of

April. This could reflect the improvement in international tourism owing to factors such as an increase in vaccination programmes around the world, softer restrictions for vaccinated travellers, and growing consumer confidence. As of 30th September 2021, 37,924 tourists had visited Sri Lanka for this year, a decline of 92.5% over last year when 507,311 tourists had visited the country from January to 18th March, 2020.

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

Table 1. Monthly tourist arrivals, September 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	-	-
November	0	-	-
December	393	-	-
Total (Jan – Sep)	507,311	37,924	(92.5)
TOTAL	507,704	-	-

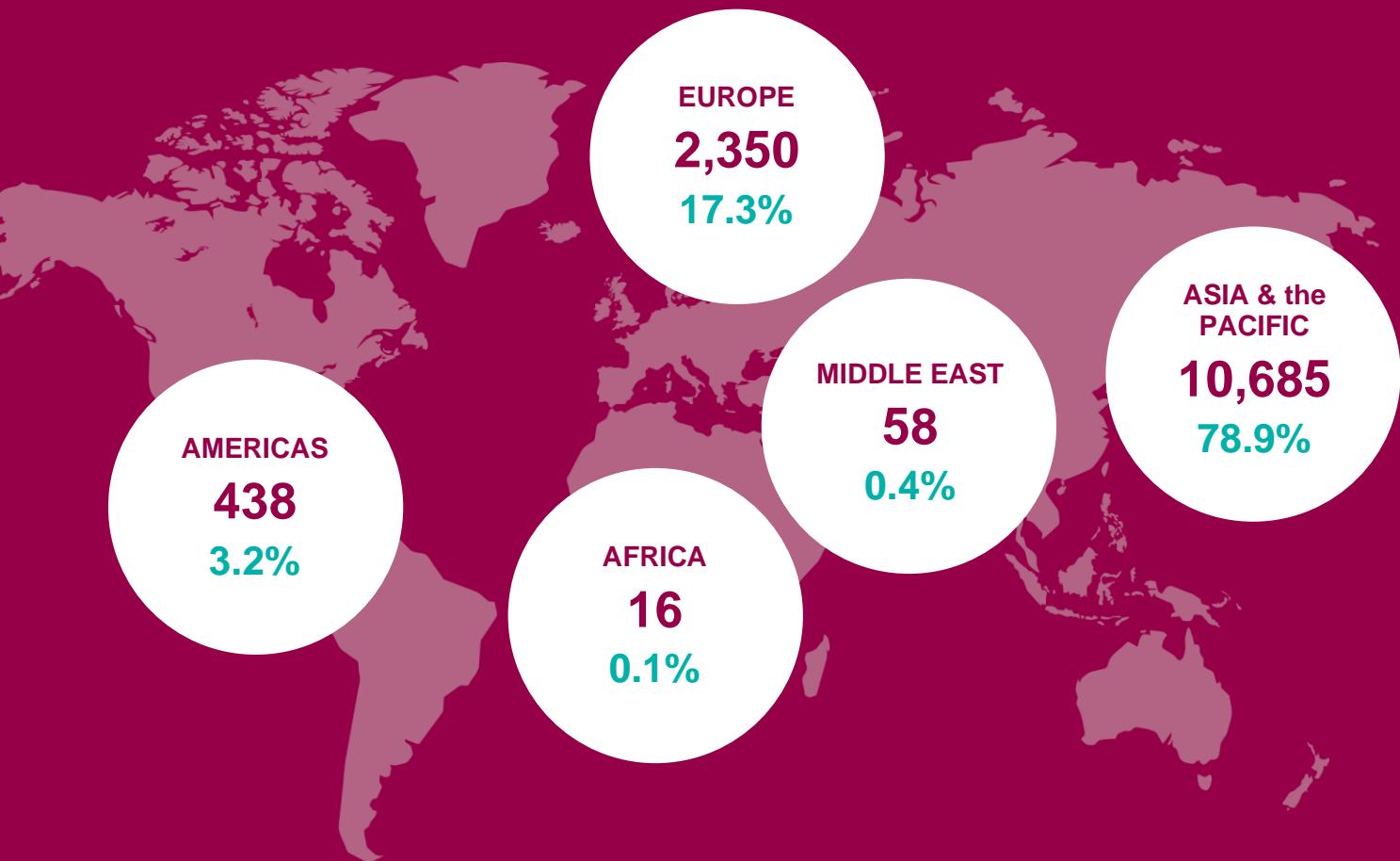
September 2021

13,547



Tourist arrivals by region and percentage share September 2021

Map 1. Tourist arrivals by region and percentage share



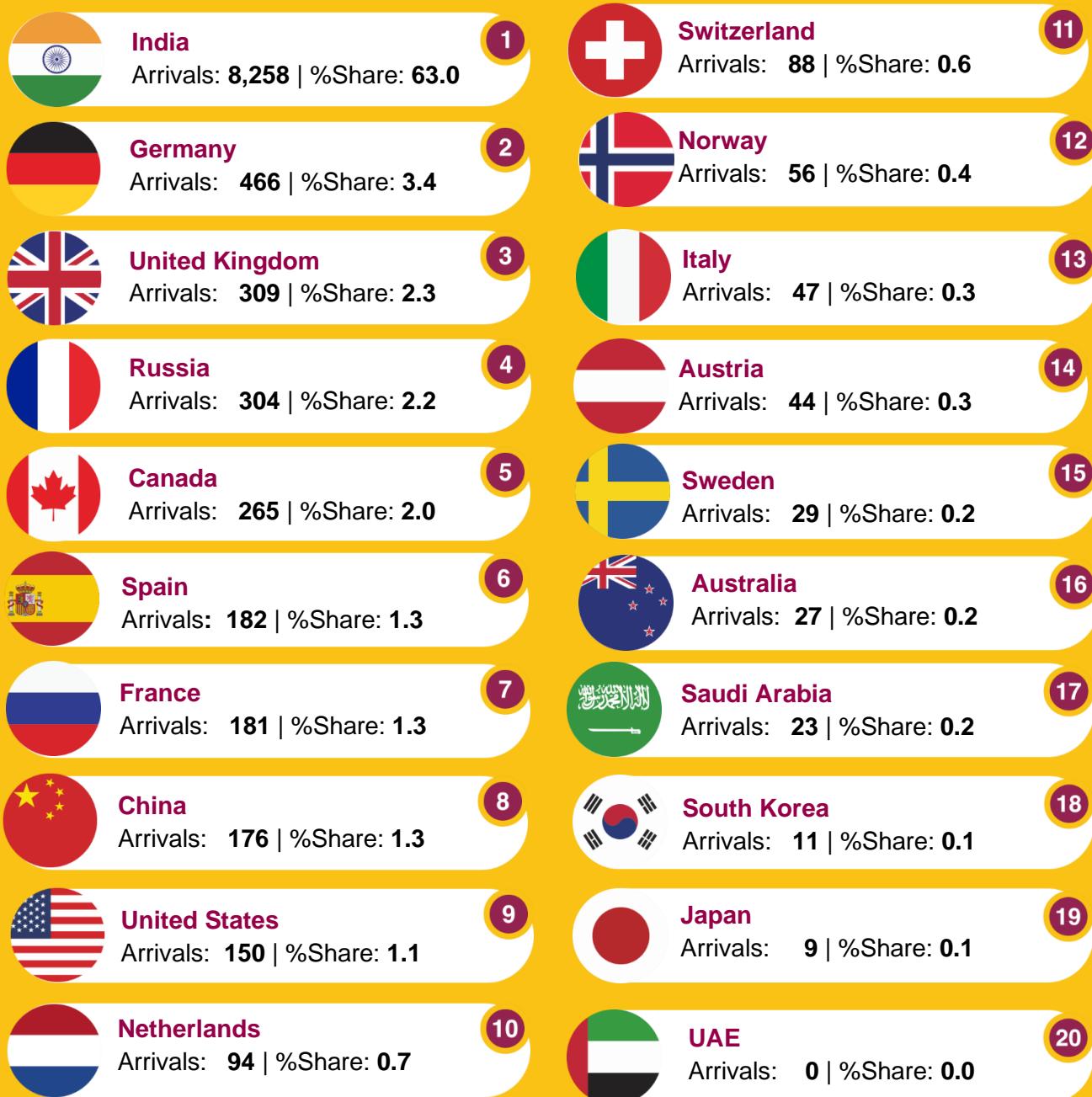
Asia and the Pacific became the largest source of tourist traffic to Sri Lanka with 78.9% of the total traffic received in September 2021. Given the adverse impact of COVID-19 on the region, this can be considered as significant growth. Geographic proximity being one of the main drivers of destination 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 17.3% of the total traffic while the Americas accounted for 3.2%. In comparison to September last 2020, all regions have recorded a decline in arrivals. However, as recovery continues an increase in arrivals could be anticipated as a 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 September 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 markets



Note: The 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 source market economy, recent consumer sentiment data and other variables. These markets could increase in priority for Sri Lanka and become primary source markets. The intention is to track these potential markets on a go-forward basis to understand future potential for Sri Lanka's tourism economy.

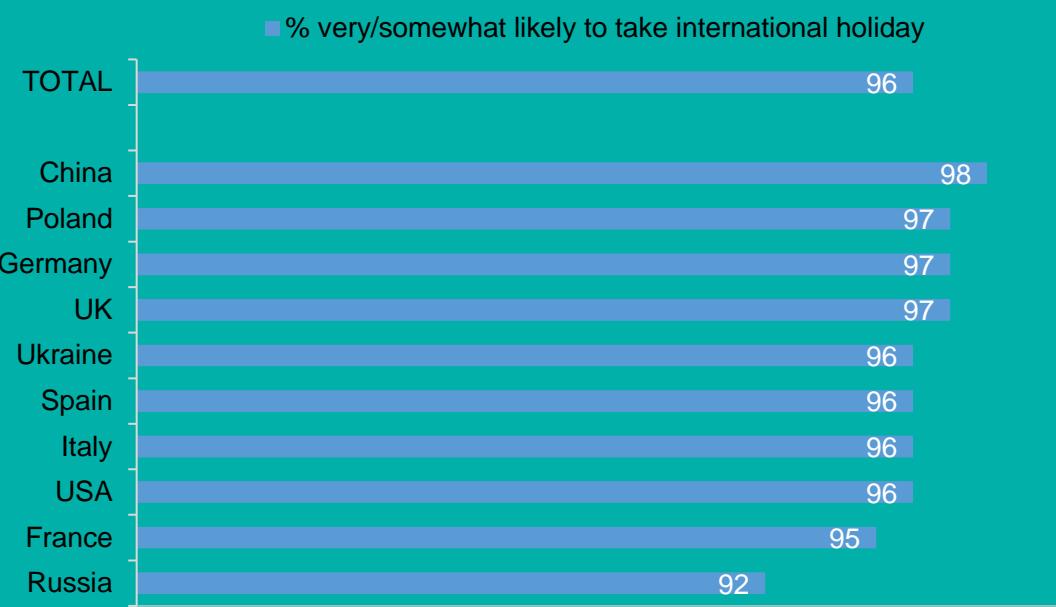


Safety and security in the post-COVID-19 global travel market, cont'd

While major health concerns still prevail in the global travel market, travel consumers are looking to the future and, in most markets according to a study by Twenty31 in May 2021, majorities say that they are very or somewhat likely to take an international holiday in the next 3 years.

- The Chinese market is the most enthusiastic in this response, with 98% very or somewhat likely.
- This is followed by Poland, Germany, and the UK all at 97%.
- The lowest likelihood is observed in Russia which still exhibits 92% who are very or somewhat likely to take an international holiday by April 2024.
- These results indicate that, while approaching travel with trepidation due to the prevalence of health concerns, travel consumers are likely to be highly receptive to credible reassurance and open to good reasons to feel safe while travelling.

Chart 1: Likelihood to take an international holiday in the next 3 years(May 2021)



Question: How likely are you to take an international overnight holiday/vacation trip in the next three years (i.e., by April 2024)?

Proximity is the main driver of recent travel patterns. In all markets, travellers had most commonly made their most recent international holiday in a neighbouring country- Americans going to Canada, Italians going to France, or Chinese going to Japan.

**Chart 1: Most recent international trip (May 2021)**

	USA	UK	France	Germany	Italy	Spain	Russia	Ukraine	China
1st	Canada (11%)	Spain (19%)	Spain (20%)	Spain (15%)	France (17%)	France (14%)	Turkey (34%)	Turkey (31%)	Japan (33%)
2nd	Mexico (10%)	USA (10%)	Italy (11%)	Italy (12%)	Spain (15%)	Italy (12%)	Egypt (7%)	Poland (15%)	USA (17%)
3rd	France (6%)	Italy (8%)	USA (6%)	USA (7%)	Germany (6%)	Portugal (8%)	Thailand (6%)	Egypt (6%)	Thailand (9%)
4th	Italy (6%)	France (7%)	Canada (6%)	Greece (6%)	Greece (5%)	Germany (6%)	Germany (5%)	Russian Federation (5%)	UK (5%)
5th	UK (5%)	Greece (7%)	Morocco (6%)	France (6%)	Egypt (5%)	USA (6%)	Italy (4%)	Croatia (9%)	Singapore (5%)

Question: Thinking about the past three years, what was the last international overnight holiday/vacation trip you took? If you visited more than one country on this trip, please think about the main country that you visited

Twenty **31**

Methodology Note: Charts 1 and 2 are based on an opinion survey of a representative sample of n=1,000 identified travel consumers in each of 10 outbound travel markets. Fieldwork was carried out online in May 2021, using market research panels. A representative sample of the online population in each market was drawn and stratified by age, gender and region. This sample was then sent a survey invitation by email, and respondents screened to identify leisure travellers. These were defined as those who either: 1. Had taken an international overnight holiday/vacation trip in the past three years (i.e., since May 2018); or 2. Are likely to take an international overnight holiday/vacation trip in the next three years (i.e., by May 2024).

Results are representative of the online adult traveller population in each market and are considered accurate within +/- 2 to 3 percentage points, 19 times out of 20. The survey uses a questionnaire developed by Twenty31 Consulting.



Top ten source markets

September 2021

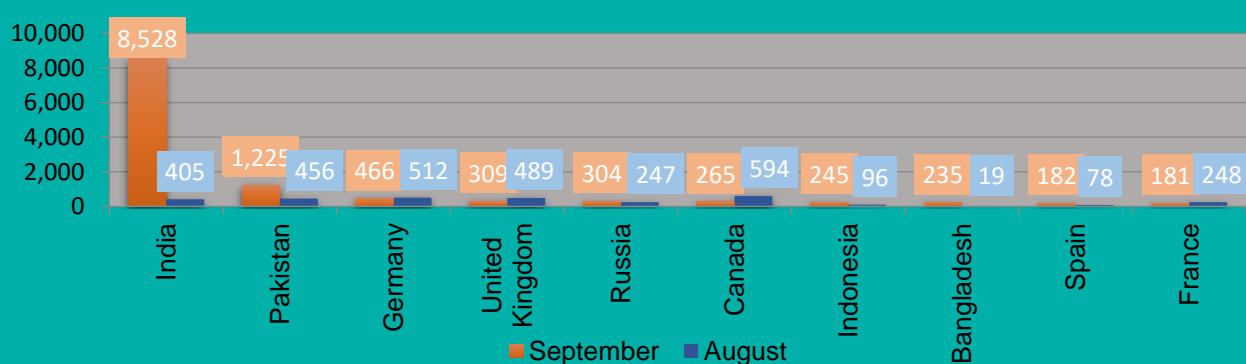
India, Pakistan, Germany, the United Kingdom, and Russia were Sri Lanka's top five international tourist generating markets in the month of September, 2021. India was the largest source of tourist visits to Sri Lanka with 63% of the total traffic received in September. Pakistan and Germany accounted for 9% and 3% 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, and the North American and Western Europe summer holiday period. Further, the desire to visit friends and relatives (VFR) could have highly motivated travel consumers, especially from Canada and the United Kingdom 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, September 2021

Rank	Country of Residence	Tourist Arrivals (September 2021)			Tourist Arrivals (September 2020)
		By Air	By Sea	Total	
1	India	8,528	-	8,528	-
2	Pakistan	1,225	-	1,225	-
3	Germany	466	-	466	-
4	United Kingdom	309	-	309	-
5	Russia	304	-	304	-
6	Canada	265	-	265	-
7	Indonesia	245	-	245	-
8	Bangladesh	235	-	235	-
9	Spain	182	-	182	-
10	France	181	-	181	-

Chart 5. Comparison of arrivals from top ten markets to Sri Lanka, Sep /Aug 2021





Top ten source markets January –September 2021

India, Kazakhstan, Ukraine, Germany, and the United kingdom, were Sri Lanka's top five international tourist-generating markets from January to September this year. All the countries in the top ten markets from January to September, 2021, recorded declines in arrivals in comparison to the same period in 2020, likely due to the persistence and unprecedented growth of the pandemic situation around the globe. It is noteworthy that total arrivals up to September from Kazakhstan had recorded a growth in comparison to total arrivals up to September 2020, likely owing to the pilot project carried out to revive the tourism industry following a 10-month pandemic-induced closure.

Chart 4. Top ten source markets to Sri Lanka, January – September, 2021

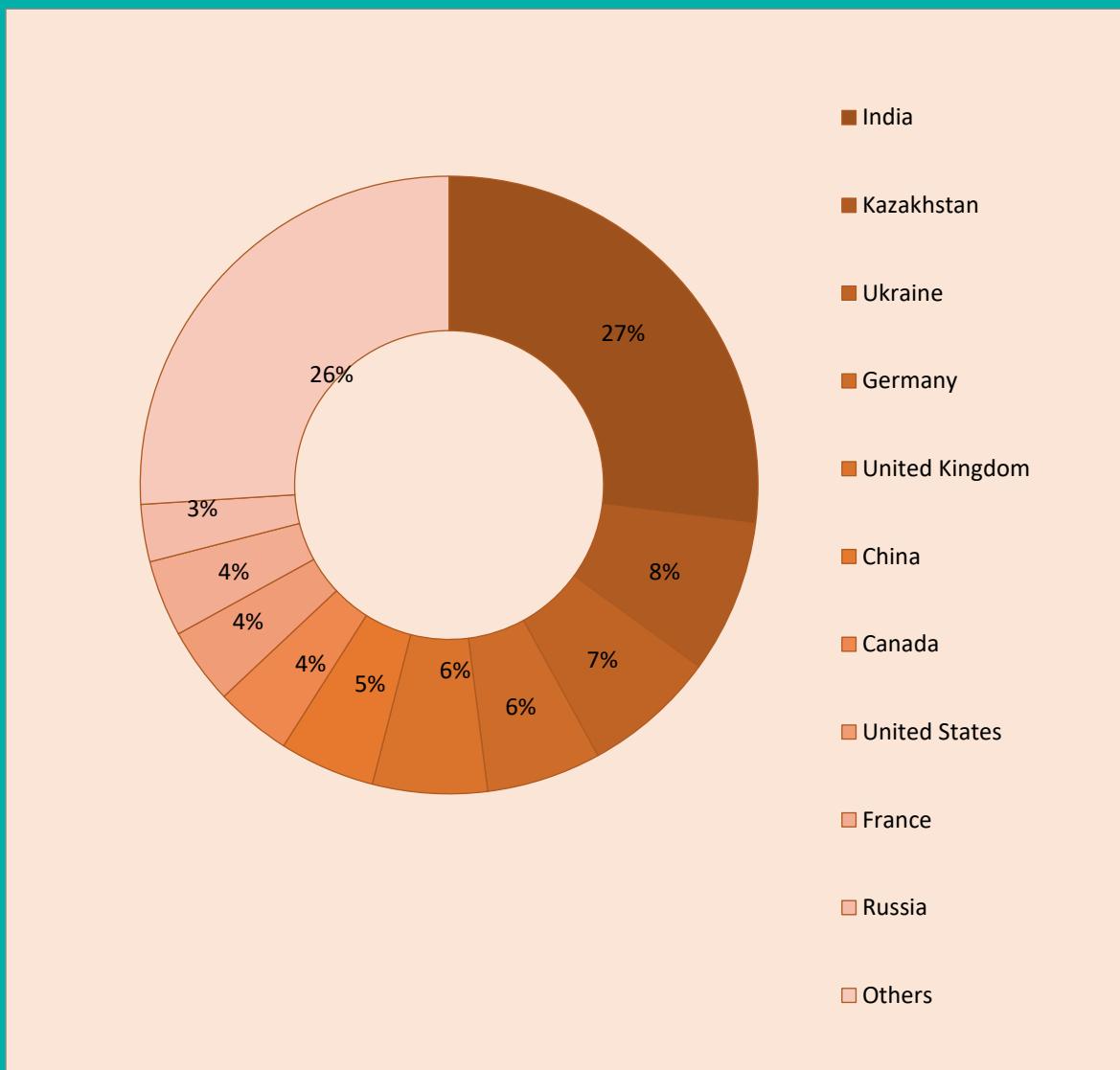
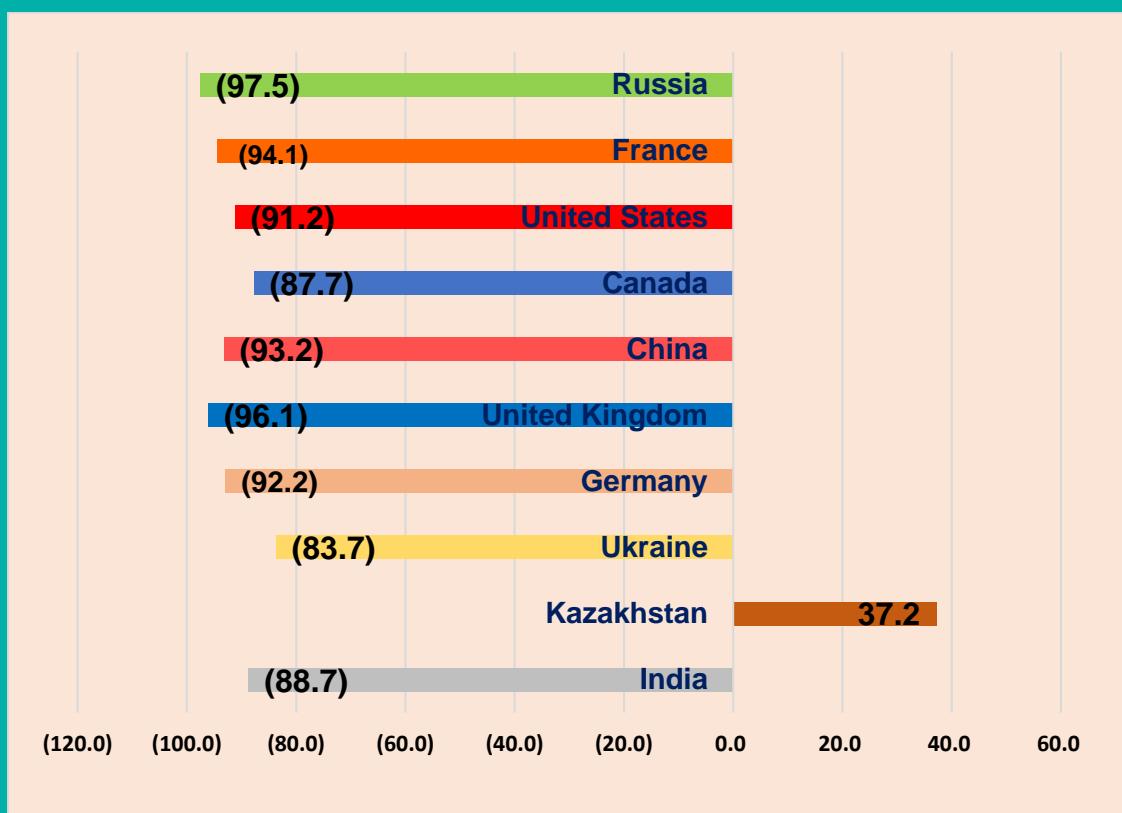




Table3. Top ten markets to Sri Lanka, January to September 2020 & 2021 and percentage change

Rank	Country of Residence	Tourist Arrivals (Jan-Sep 2021)	Tourist Arrivals (Jan-Sep 2020)	%Change (Jan-Sep 2021 & Jan-Sep 2020)
1	India	10,060	89,357	(88.7)
2	Kazakhstan	3,200	2,333	37.2
3	Ukraine	2,742	16,776	(83.7)
4	Germany	2,704	34,507	(92.2)
5	United Kingdom	2,142	55,455	(96.1)
6	China	1,765	26,147	(93.2)
7	Canada	1,525	12,436	(87.7)
8	United States	1,489	16,842	(91.2)
9	France	1,457	24,838	(94.1)
10	Russia	1,253	49,397	(97.5)

Chart 6. Top ten source markets,percentage changes, January–September 2021 & January–September 2020





International tourist arrivals by country of residence

September 2021				Total Tourist Arrivals Sep. 2020	% Change Sep. (20/21)	Total Tourist Arrivals up to Sep. 2021	Total Tourist Arrivals up to Sep. 2020	% Change up to Sep. (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
AMERICAS	438	0	438	0	-	3,108	31,843	(90.2)
North America	419	0	419	0	-	3,028	29,627	(89.8)
Canada	265	0	265	0	-	1,525	12,436	(87.7)
Mexico	4	0	4	0	-	14	349	(96.0)
United States	150	0	150	0	-	1,489	16,842	(91.2)
Caribbean & Central America	7	0	7	0	-	23	226	(89.8)
Costa Rica	0	0	0	0	-	0	33	-
Jamaica	0	0	0	0	-	1	25	(96.0)
Others	7	0	7	0	-	22	168	(86.9)
South America	12	0	12	0	-	57	1,990	(97.1)
Argentina	3	0	3	0	-	10	416	(97.6)
Brazil	6	0	6	0	-	25	875	(97.1)
Chile	0	0	0	0	-	1	271	(99.6)
Colombia	0	0	0	0	-	14	201	(93.0)
Others	3	0	3	0	-	7	227	(96.9)
AFRICA	16	0	16	0	-	151	2,880	(94.8)
North Africa	5	0	5	0	-	24	689	(96.5)
Morocco	1	0	1	0	-	7	311	(97.7)
Sudan	1	0	1	0	-	8	143	(94.4)
Others	3	0	3	0	-	9	235	(96.2)
Sub-Saharan Africa	11	0	11	0	-	127	2,191	(94.2)
Kenya	1	0	1	0	-	4	110	(96.4)
Mauritius	1	0	1	0	-	7	170	(95.9)
Nigeria	1	0	1	0	-	3	25	(88.0)
South Africa	4	0	4	0	-	77	1,364	(94.4)
Others	4	0	4	0	-	36	522	(93.1)



September 2021			Total Tourist Arrivals Sep. 2020	% Change Sep. (20/21)	Total Tourist Arrivals up to Sep. 2021	Total Tourist Arrivals up to Sep. 2020	% Change up to Sep. (20/21)
	Tourist Arrivals						
	By Air	By Sea	Total				
ASIA & PACIFIC	10,685	0	10,685	0	-	16,191	181,154 (91.1)
North East Asia	199	0	199	0	-	1,907	37,320 (94.9)
China	176	0	176	0	-	1,776	26,147 (93.2)
Japan	9	0	9	0	-	85	6,644 (98.7)
South Korea	11	0	11	0	-	31	2,499 (98.8)
Taiwan	3	0	3	0	-	15	1,985 (99.2)
Others	0	0	0	0	-	0	45 -
South East Asia	304	0	304	0	-	689	14,927 (95.4)
Cambodia	0	0	0	0	-	1	372 (99.7)
Indonesia	245	0	245	0	-	389	1,114 (65.1)
Malaysia	3	0	3	0	-	24	3,494 (99.3)
Myanmar	2	0	2	0	-	20	532 (96.2)
Philippines	31	0	31	0	-	159	4,249 (96.3)
Singapore	16	0	16	0	-	53	2,545 (97.9)
Thailand	5	0	5	0	-	27	1,880 (98.6)
Vietnam	2	0	2	0	-	16	709 (97.7)
Others	0	0	0	0	-	0	32 -
Oceania	30	0	30	0	-	290	22,706 (98.7)
Australia	27	0	27	0	-	231	20,283 (98.9)
New Zealand	3	0	3	0	-	54	2,324 (97.7)
Others	0	0	0	0	-	5	99 (94.9)
South Asia	10,152	0	10,152	0	-	13,305	106,201 (87.5)
Afghanistan	4	0	4	0	-	9	146 (93.8)
Bangladesh	235	0	235	0	-	307	1,986 (84.5)
Bhutan	0	0	0	0	-	2	208 (99.0)
India	8,528	0	8,528	0	-	10,060	89,357 (88.7)
Iran	7	0	7	0	-	94	648 (85.5)
Maldives	146	0	146	0	-	949	9,407 (89.9)
Nepal	7	0	7	0	-	22	1,384 (98.4)
Pakistan	1,225	0	1,225	0	-	1,862	3,065 (39.2)



September 2021				Total Tourist Arrivals Sep. 2020	% Change Sep. (20/21)	Total Tourist Arrivals up to Sep. 2021	Total Tourist Arrivals up to Sep. 2020	% Change up to Sep. (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
EUROPE	2,350	0	2,350	0	-	17,987	281,203	(93.6)
Northern Europe	495	0	495	0	-	2,872	75,146	(96.2)
Denmark	62	0	62	0	-	171	4,905	(96.5)
Finland	20	0	20	0	-	49	2,298	(97.9)
Norway	56	0	56	0	-	245	3,019	(91.9)
Sweden	29	0	29	0	-	169	7,061	(97.6)
United Kingdom	309	0	309	0	-	2,142	55,455	(96.1)
Others	19	0	19	0	-	96	2,408	(96.0)
Western Europe	934	0	934	0	-	5,697	82,229	(93.1)
Austria	44	0	44	0	-	257	4,300	(94.0)
Belgium	61	0	61	0	-	174	3,371	(94.8)
France	181	0	181	0	-	1,457	24,838	(94.1)
Germany	466	0	466	0	-	2,704	34,507	(92.2)
Netherlands	94	0	94	0	-	438	8,656	(94.9)
Switzerland	88	0	88	0	-	648	6,389	(89.9)
Others	0	0	0	0	-	19	168	(88.7)
Central/Eastern Europe	483	0	483	0	-	8,211	100,373	(91.8)
Belarus	13	0	13	0	-	101	2,638	(96.2)
Czech Republic	39	0	39	0	-	216	7,599	(97.2)
Estonia	0	0	0	0	-	35	1,185	(97.0)
Hungary	12	0	12	0	-	36	1,588	(97.7)
Kazakhstan	3	0	3	0	-	3,200	2,333	37.2
Lithuania	11	0	11	0	-	38	1,054	(96.4)
Poland	20	0	20	0	-	155	11,908	(98.7)
Romania	7	0	7	0	-	73	1,724	(95.8)
Russian Federation	304	0	304	0	-	1,253	49,397	(97.5)
Slovakia	21	0	21	0	-	143	1,513	(90.5)
Ukraine	43	0	43	0	-	2,742	16,776	(83.7)
Others	10	0	10	0	-	219	2,658	(91.8)



September 2021			Total Tourist Arrivals Sep. 2020	% Change Sep. (20/21)	Total Tourist Arrivals up to Sep. 2021	Total Tourist Arrivals up to Sep. 2020	% Change up to Sep. (20/21)
	Tourist Arrivals						
	By Air	By Sea	Total				
Southern/Mediterranean Europe	438	0	438	0	-	1,207	23,455 (94.9)
Greece	14	0	14	0	-	30	1,573 (98.1)
Italy	47	0	47	0	-	280	8,603 (96.7)
Portugal	17	0	17	0	-	44	1,602 (97.3)
Spain	182	0	182	0	-	389	3,385 (88.5)
Turkey	16	0	16	0	-	72	2,121 (96.6)
Israel	147	0	147	0	-	306	3,556 (91.4)
Others	15	0	15	0	-	86	2,615 (96.7)
MIDDLE EAST	58	0	58	0	-	487	10,231 (95.2)
Bahrain	0	0	0	0	-	31	549 (94.4)
Egypt	8	0	8	0	-	39	956 (95.9)
Iraq	2	0	2	0	-	17	138 (87.7)
Jordan	8	0	8	0	-	115	627 (81.7)
Kuwait	4	0	4	0	-	14	825 (98.3)
Lebanon	4	0	4	0	-	132	483 (72.7)
Oman	5	0	5	0	-	18	1,045 (98.3)
Qatar	0	0	0	0	-	3	129 (97.7)
Saudi Arabia	23	0	23	0	-	83	4,755 (98.3)
United Arab Emirates	0	0	0	0	-	20	352 (94.3)
Others	4	0	4	0	-	15	372 (96.0)
TOTAL	13,547	0	13,547	0	-	37,924	507,311 (92.5)



Main last departure airports and airlines to Sri Lanka, September 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 38% of tourists the last airports had been Chennai, Doha, and Mumbai. Further, in terms of airlines Sri Lankan Airlines, Qatar Airlines and IndiGo were the top airlines, handling 90% of tourists to Sri Lanka.

Chart 7. Main last departure airports to Sri Lanka, September 2021

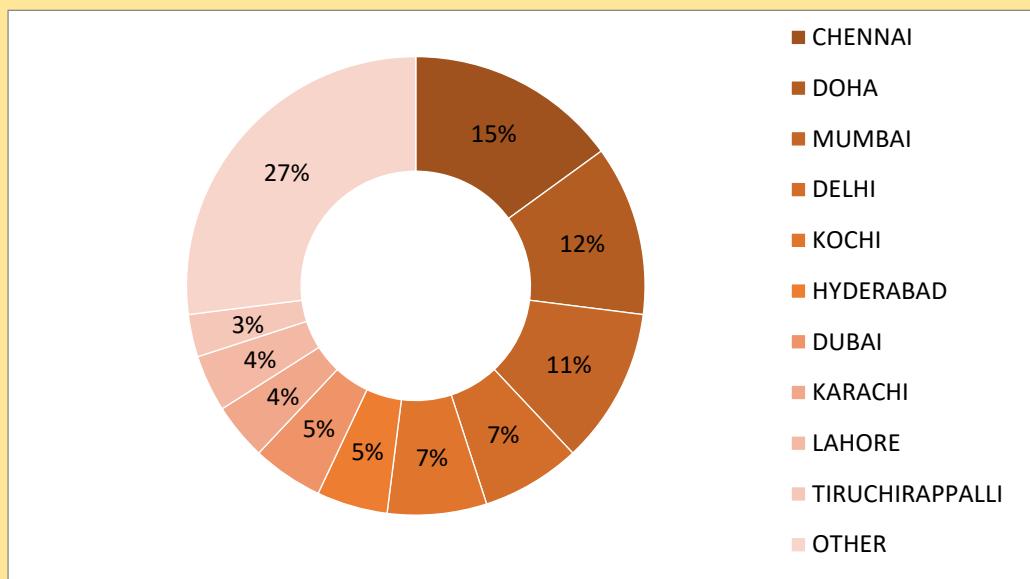
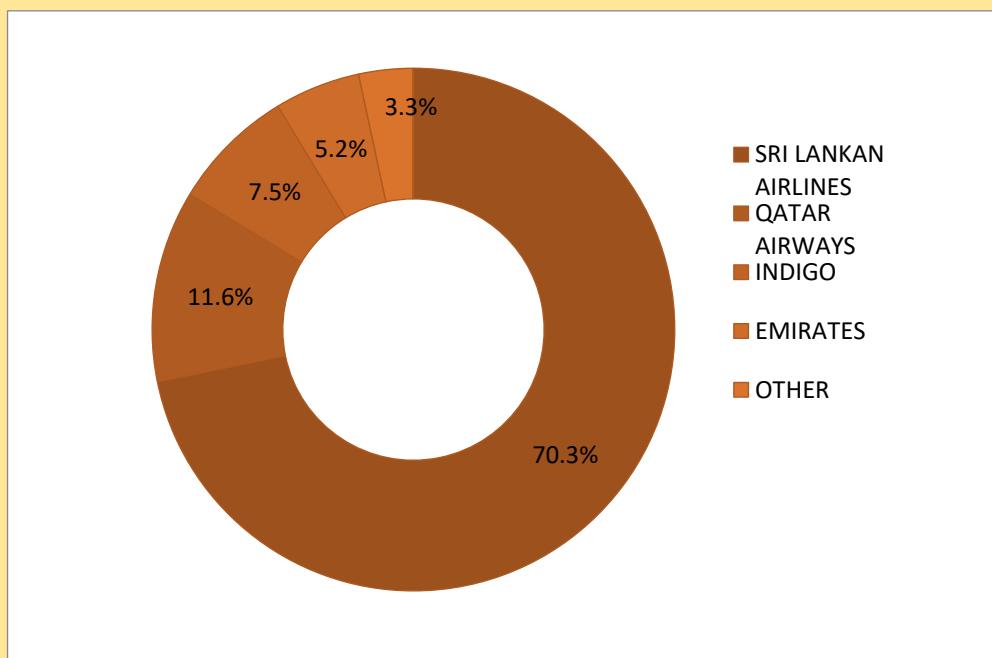


Chart 8. Main airlines to Sri Lanka, September 2021





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

The below tables depict the main last departure airports and airlines analysed 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.

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

	Top Ten Markets	Number of passengers as a percentage																								
		Bangalore	Chennai	Chongqing	Cochin	India	Delhi	Dhaka	Dohar	Domedovo	Dubai	Frankfurt	Hyderabad	Jakarta	Katouchi	Kochi	Lahore	London	London Heathrow	Mumbai	Shafra	Thiniananthapuram	Tiruchirappalli	Trichy	Trivandrum	Other Ports
1	India	4	23	0	3	11	0	0	0	0	0	8	0	4	11	0	0	0	0	18	0	3	4	3	8,528	
2	Pakistan	0	7	0	0	0	0	0	0	0	10	0	0	0	26	0	44	0	0	0	8	0	0	0	6	1,225
3	Germany	0	0	0	0	0	0	58	0	20	11	0	0	0	0	0	0	2	0	0	0	0	0	9	466	
4	United Kingdom	1	1	0	0	0	0	27	0	13	0	0	0	1	0	0	31	10	0	0	0	0	0	0	15	309
5	Russia	0	0	0	0	0	0	18	73	4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	304
6	Canada	0	5	0	0	0	0	68	0	15	1	1	0	0	0	0	0	2	0	1	0	0	0	0	6	265
7	Indonesia	0	0	15	0	0	0	0	0	0	0	0	82	0	0	0	0	0	0	0	0	0	0	0	2	245
8	Bangladesh	0	0	0	0	0	87	9	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	235
9	Spain	0	0	0	0	0	0	75	0	5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	20	182
10	France	0	1	0	0	0	0	80	0	10	0	0	0	0	0	0	0	2	0	0	0	0	0	0	8	181

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

Top Ten Markets	Sri Lankan Airlines	Percentage share of the airline												Total Passengers
		IndiGo	Qatar Airlines	Emirates	Air India	Air Arabia	Turkish Airlines	Gulf Air	Oman Air	Other Airlines				
1	India	84.0	11.9	0.2	0.2	3.4	0.0	0.0	0.1	0.0	0.2			8,528
2	Pakistan	78.0	0.0	0.4	10.4	0.0	7.5	0.0	1.1	2.0	0.5			1,225
3	Germany	16.1	0.0	58.2	21.7	0.0	0.0	2.4	0.4	0.6	0.6			466
4	United Kingdom	47.9	0.0	26.5	16.8	0.0	0.0	0.3	6.5	0.3	1.6			309
5	Russia	75.7	0.0	18.1	3.0	0.0	0.3	2.6	0.3	0.0	0.0			304
6	Canada	14.0	0.4	67.9	13.2	0.0	0.0	0.4	0.4	0.4	3.4			265
7	Indonesia	99.6	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0			245
8	Bangladesh	88.1	0.0	8.9	2.6	0.0	0.0	0.0	0.0	0.0	0.4			235
9	Spain	0.5	0.0	74.7	9.9	0.0	0.0	12.6	0.5	0.5	1.1			182
10	France	5.0	0.0	79.6	11.6	0.0	0.0	3.3	0.0	0.0	0.6			181



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