

Monthly Tourist Arrivals Report:

January 2023

Sri Lanka Tourism Development Authority

Introduction

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



Table of contents

Summary	4
Tourist arrivals by region and percentage share, January 2023.....	5
Top primary markets and top potential markets, January 2023.....	6
Top ten source markets, January 2023	8
Tourist arrivals by purpose of visit, January 2023	9
International tourist arrivals by country of residence.....	10
Main last departure airports and airlines to Sri Lanka, January 2023.....	13

Summary

The total number of international tourist arrivals to Sri Lanka during January 2023 was 102,545. This is an increase of 24.5% compared to January 2022 and reaching 43% 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 resumed cruise tourism

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 January were Russian Federation, India, the United Kingdom, Germany and France.

Table 1. Monthly tourist arrivals, January 2023

Month	2022	2023	% change 2023/22
January	82,327	102,545	24.5
February	96,507		
March	106,500		
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		

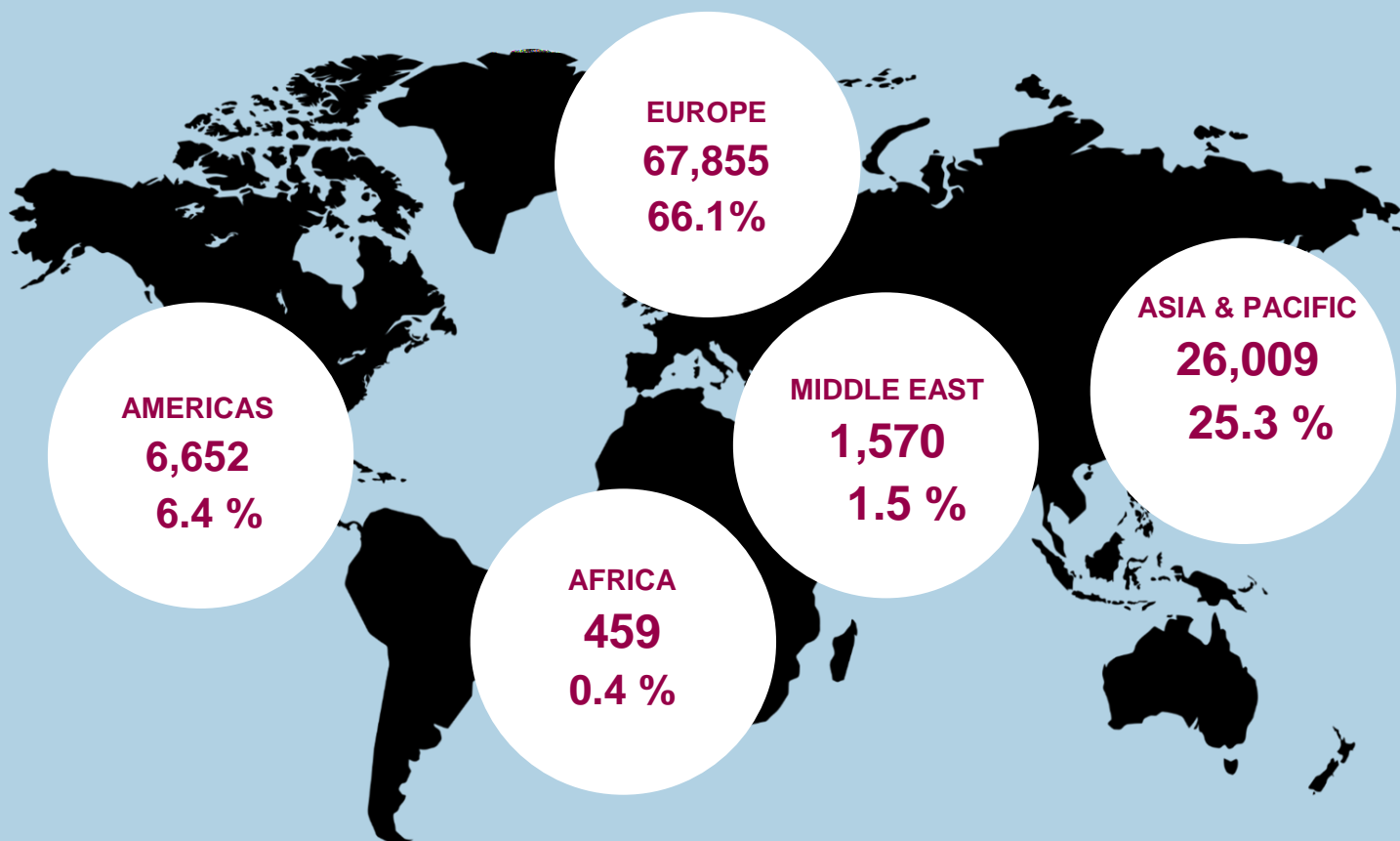


Tourist Arrivals | January 2023

102,545

Tourist arrivals by region and percentage share January 2023

Map 1. Tourist arrivals by region and percentage share



Europe emerged as the primary source of tourists visiting Sri Lanka, accounting for 66.1% 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.

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 and geopolitical obstacles.

Meanwhile, 25.3% of tourists came from Asia and the Pacific region, 6.4% from the Americas, and 1.5% 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.

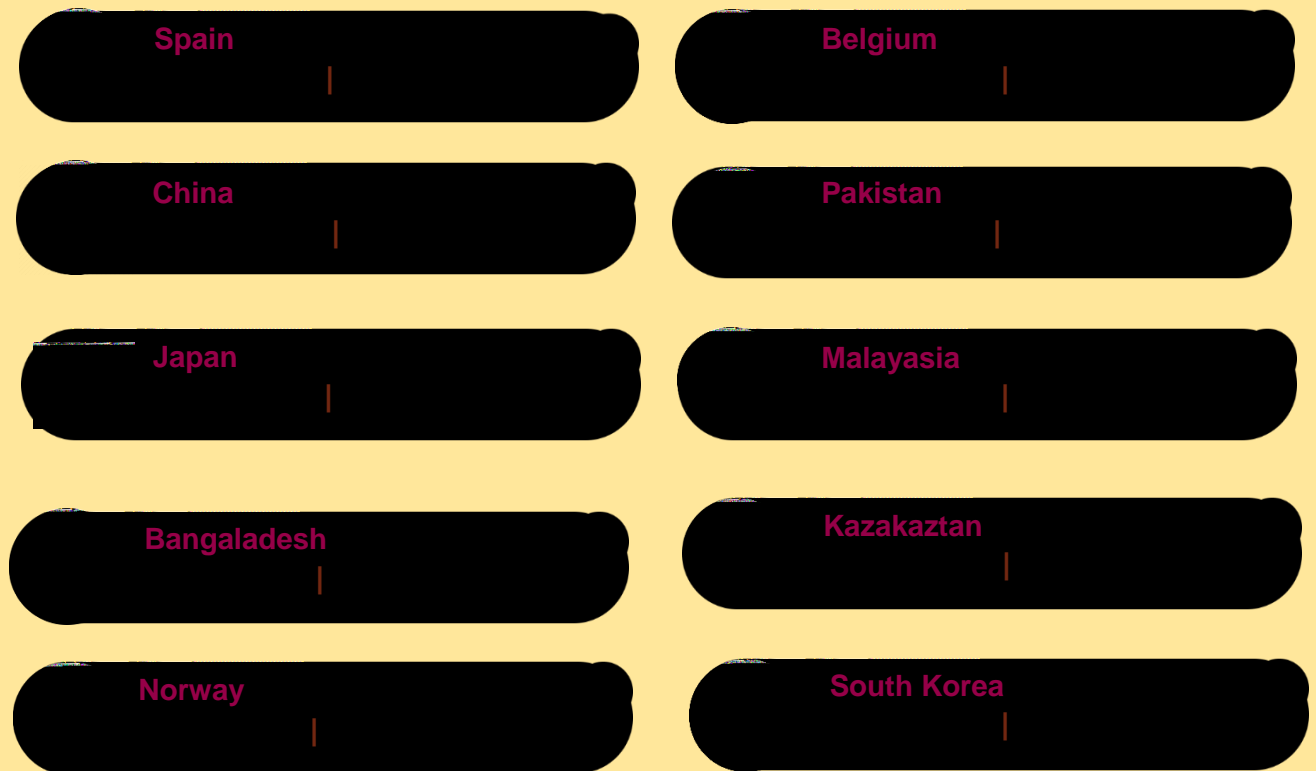
Top primary markets and top potential markets

Top primary markets - January 2023

Russia,	Switzerland
India	Netherlands
United Kingdom	Italy
Germany	Poland
France	Belarus
Canada	Denmark
Australia	Czech Republic
United States	Austria
Maldives	Ukraine
Israel	Sweden

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 - January 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

January 2023

In January, 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 25% of total arrivals. India accounted for 13%, the United Kingdom for 8%, Germany for 8%, and France for 5%. 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.

The influx of 1309 tourists from three cruise ships too had a notable impact on the rise in the number of visitors.

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

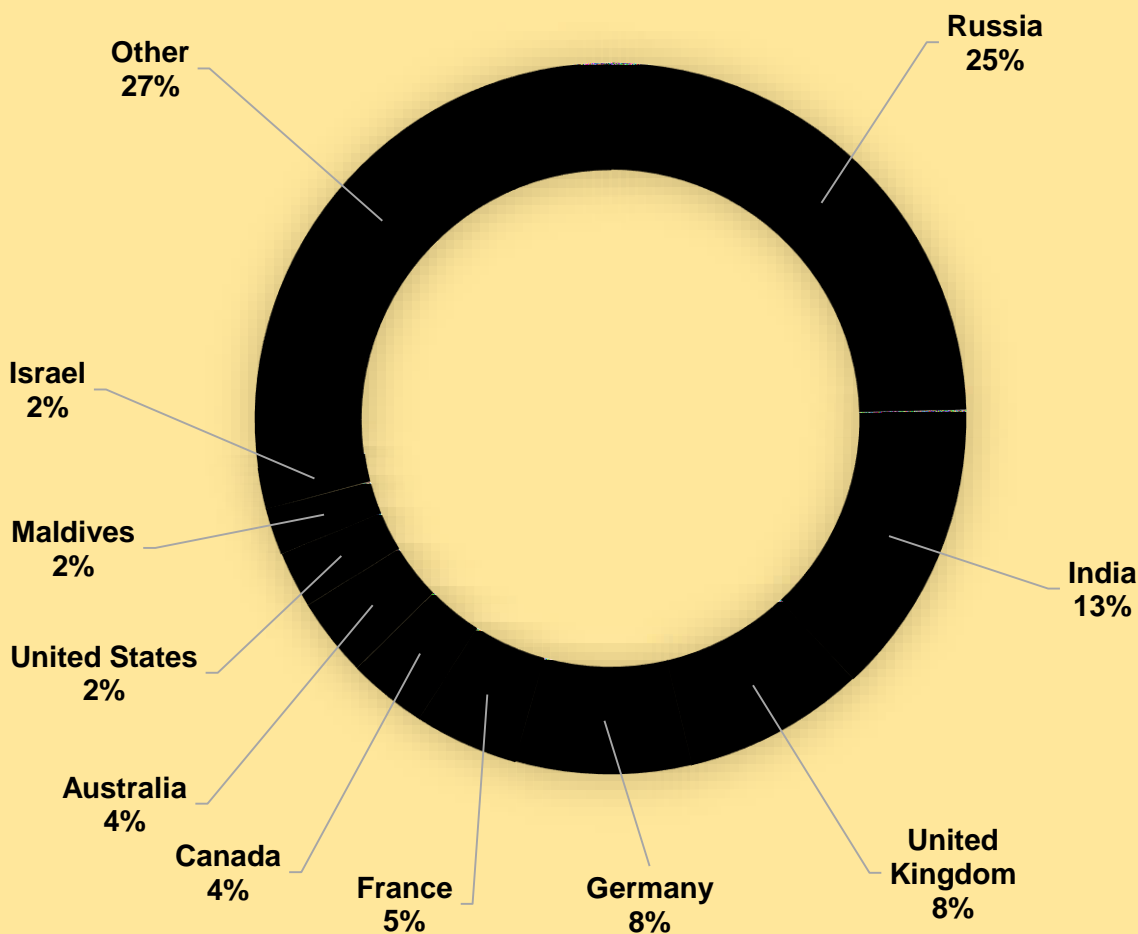


Table 2. Top ten source markets to Sri Lanka, January 2023

Rank	Country of Residence	Tourist Arrivals (January 2023)			Tourist Arrivals (January 2022)
		By Air	By Sea	Total	
1	Russian Federation	25,254	0	25,254	13,478
2	India	13,759	0	13,759	11,751
3	United Kingdom	8,472	11	8,483	7,442
4	Germany	7,106	1,111	8,217	5,339
5	France	4,836	4	4,840	3,616
6	Canada	3,676	5	3,681	1,666
7	Australia	3,660	8	3,668	2,814
8	United States	2,576	60	2,636	1,829
9	Maldives	2,203	0	2,203	2,401
10	Israel	1,868	0	1,868	707



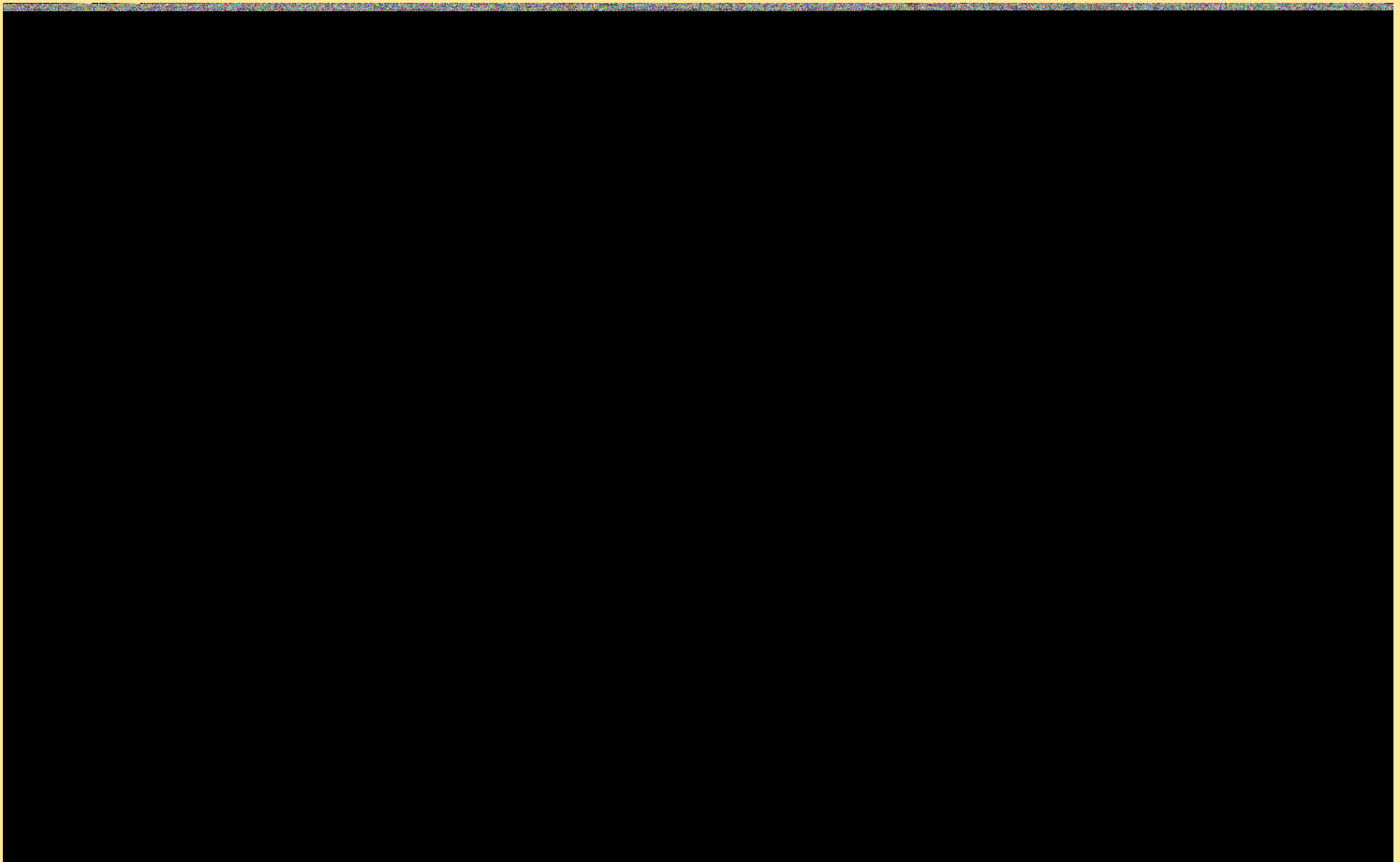
Tourist arrivals by purpose of visit

January 2023

An analysis of tourist arrivals by purpose of visit reveals that a majority 55.7% of tourists had visited Sri Lanka for pleasure/vacation, while for 17% of tourists the main purpose was visiting friends and relatives. Only 4.5% of tourists had visited for business related purposes. 6% had visited for MICE purposes, while 1.1% and 0.2% had visited for purposes such as health / ayurvedic 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, 57% of tourists from Russia, 52.4% from India, 70% from Germany, 52% from the United Kingdom, 70% from France, and 69% from Israel visited Sri Lanka for this purpose. It is noteworthy that for majority of tourists from Canada(73%) and Australia(67%) the main purpose of visit was seeing their friends and relatives. Only 20% of tourists from Canada and 23% of tourists from Australia had come for pleasure/vacation purpose. Further 18.5% of tourists from Israel and 7.4% of Indians had come to Sri Lanka for Meetings, Incentives, Conferences and Exhibitions while 22.3% of Indians had visited Sri Lanka for Business purposes.

Chart 2 :Purpose of visit vs main source markets





International tourist arrivals by country of residence

	January 2023			Tourist Arrivals Jan. 2022	% Change Jan. (23/22)
	Tourist Arrivals				
	By Air	By Sea	Total		
AMERICAS	6,587	65	6,652	3,691	80.22
North America	6,271	65	6,336	3,516	80.20
Canada	3,676	5	3,681	1,666	120.95
Mexico	19	0	19	21	(9.52)
United States	2,576	60	2,636	1,829	44.12
Carribean & Central America	48	0	48	24	100.00
Costa Rica	06	0	06	4	50.00
Jamaica	01	0	01	2	(50.00)
Others	41	0	41	18	127.78
South America	268	0	268	151	77.48
Argentina	76	0	76	29	162.07
Brazil	101	0	101	49	106.12
Chile	26	0	26	29	(10.34)
Colombia	36	0	36	20	80.00
Others	29	0	29	24	20.83
AFRICA	457	2	459	420	9.29
North Africa	172	0	172	212	(18.87)
Morocco	47	0	47	29	62.07
Sudan	61	0	61	147	(58.50)
Others	64	0	64	36	77.78
Sub-Saharan Africa	285	2	287	208	37.98
Kenya	23	0	23	19	21.05
Mauritius	19	0	19	7	171.43
Nigeria	10	0	10	5	100.00
South Africa	123	2	125	73	71.23
Others	110	0	110	104	5.77



	January 2023			Tourist Arrivals Jan. 2022	% Change Jan. (23/22)
	Tourist Arrivals				
	By Air	By Sea	Total		
ASIA & PACIFIC	26,000	9	26,009	19,531	33.17
North East Asia	2,181	1	2,182	449	385.97
China	835	0	835	226	269.47
Japan	743	1	744	92	708.70
South Korea	450	0	450	104	332.69
Taiwan	151	0	151	13	-
Others	02	0	02	14	(85.71)
South East Asia	1,715	0	1,715	700	145.00
Cambodia	31	0	31	21	47.62
Indonesia	138	0	138	75	84.00
Malaysia	496	0	496	159	211.95
Myanmar	35	0	35	16	118.75
Philippines	188	0	188	109	72.48
Singapore	414	0	414	229	80.79
Thailand	279	0	279	72	287.50
Vietnam	117	0	117	17	588.24
Others	17	0	17	2	750.00
Oceania	4,062	8	4,070	2,928	39.00
Australia	3,660	8	3,668	2,814	30.35
New Zealand	394	0	394	112	251.79
Others	08	0	8	2	300.00
South Asia	18,042	0	18,042	15,454	16.75
Afghanistan	09	0	09	0	-
Bangladesh	717	0	717	302	137.42
Bhutan	32	0	32	30	6.67
India	13,759	0	13,759	11,751	17.09
Iran	435	0	435	260	67.31
Maldives	2,203	0	2,203	2,401	(8.25)
Nepal	292	0	292	100	192.00
Pakistan	595	0	595	610	(2.46)
EUROPE	66,622	1,233	67,855	56,605	19.87
Northern Europe	11,653	14	11,667	10,168	14.74
Denmark	1,080	1	1,081	1,013	6.71
Finland	257	0	257	271	(5.17)
Norway	698	0	698	521	33.97
Sweden	871	0	871	683	27.53
United Kingdom	8,472	11	8,483	7,442	13.99
Others	275	2	277	238	16.39



	January 2023 Tourist Arrivals			Tourist Arrivals Jan. 2022	% Change Jan. (23/22)
	By Air	By Sea	Total		
Western Europe	16,779	1,205	17,984	12,578	42.98
Austria	913	43	956	788	21.32
Belgium	646	0	646	495	30.51
France	4,836	4	4,840	3,616	33.85
Germany	7,106	1111	8,217	5,339	53.91
Netherlands	1,510	4	1,514	1,141	32.69
Switzerland	1,731	38	1,769	1,186	49.16
Others	37	5	42	13	223.08
Central/ Eastern Europe	32,730	8	32,738	31,284	4.65
Belarus	1,204	0	1,204	736	63.59
Czech Republic	960	0	960	1,174	(18.23)
Estonia	182	0	182	185	(1.62)
Hungary	400	0	400	425	(5.88)
Kazakhstan	470	0	470	2,041	(76.97)
Lithuania	278	0	278	352	(21.02)
Poland	1,264	5	1,269	3,185	(60.16)
Romania	314	2	316	528	(40.15)
Russia	25,254	0	25,254	13,478	87.37
Slovakia	351	0	351	363	(3.31)
Ukraine	883	1	884	7,774	(88.63)
Others	1,170	0	1,170	1,043	12.18
Southern/ Mediterranean Europe	5,460	6	5,466	2,575	112.27
Greece	149	2	151	78	93.59
Italy	1,473	4	1,477	503	193.64
Portugal	230	0	230	157	46.50
Spain	857	0	857	597	43.55
Turkey	362	0	362	174	108.05
Israel	1,868	0	1,868	707	164.21
Others	521	0	521	359	45.13
MIDDLE EAST	1,570	0	1,570	2,080	(24.52)
Bahrain	134	0	134	59	127.12
Egypt	127	0	127	217	(41.47)
Iraq	63	0	63	72	(12.50)
Jordan	261	0	261	224	16.52
Kuwait	162	0	162	36	350.00
Lebanon	111	0	111	87	27.59
Oman	183	0	183	101	81.19
Qatar	34	0	34	4	750.00
Saudi Arabia	340	0	340	1,167	(70.87)
United Arab Emirates	101	0	101	64	57.81
Others	54	0	54	49	10.20
TOTAL	101,236	1,309	102,545	82,327	24.56



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

Air connectivity is critical to the tourism industry in Sri Lanka, as shown by the analysis of departure airports. Chart 3 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 57% 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 3. Main last departure airports to Sri Lanka, January 2023

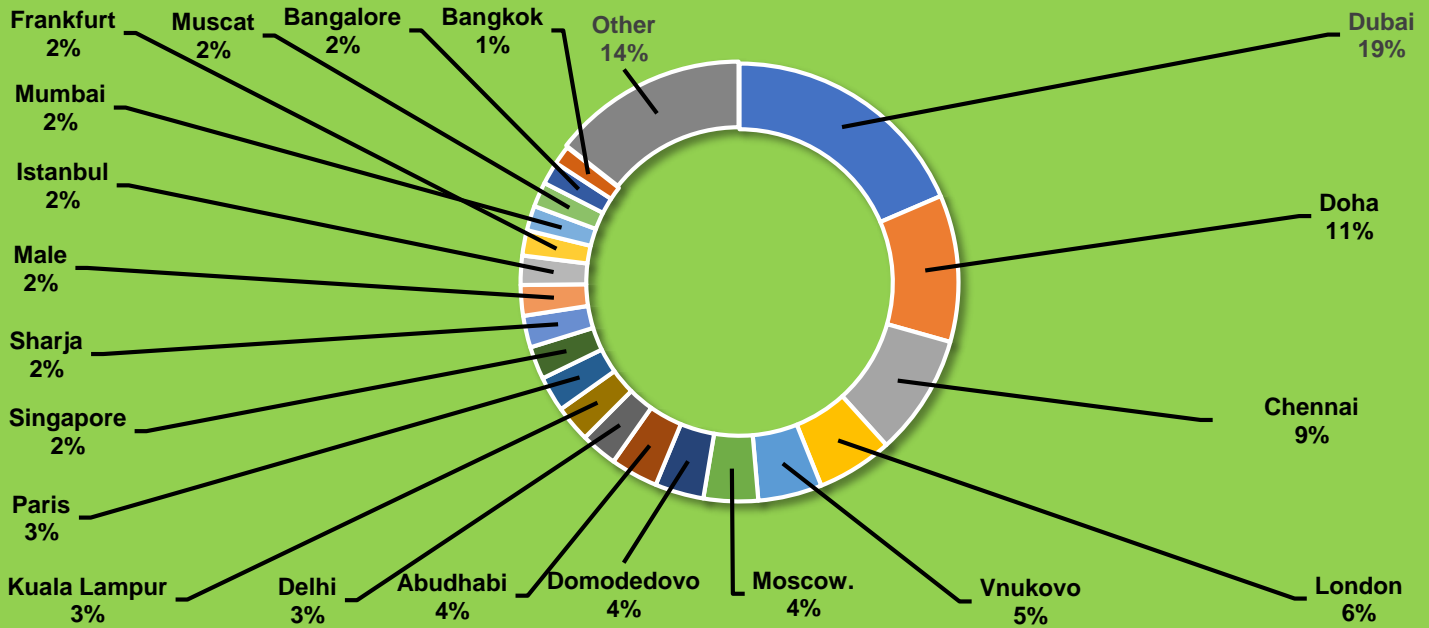
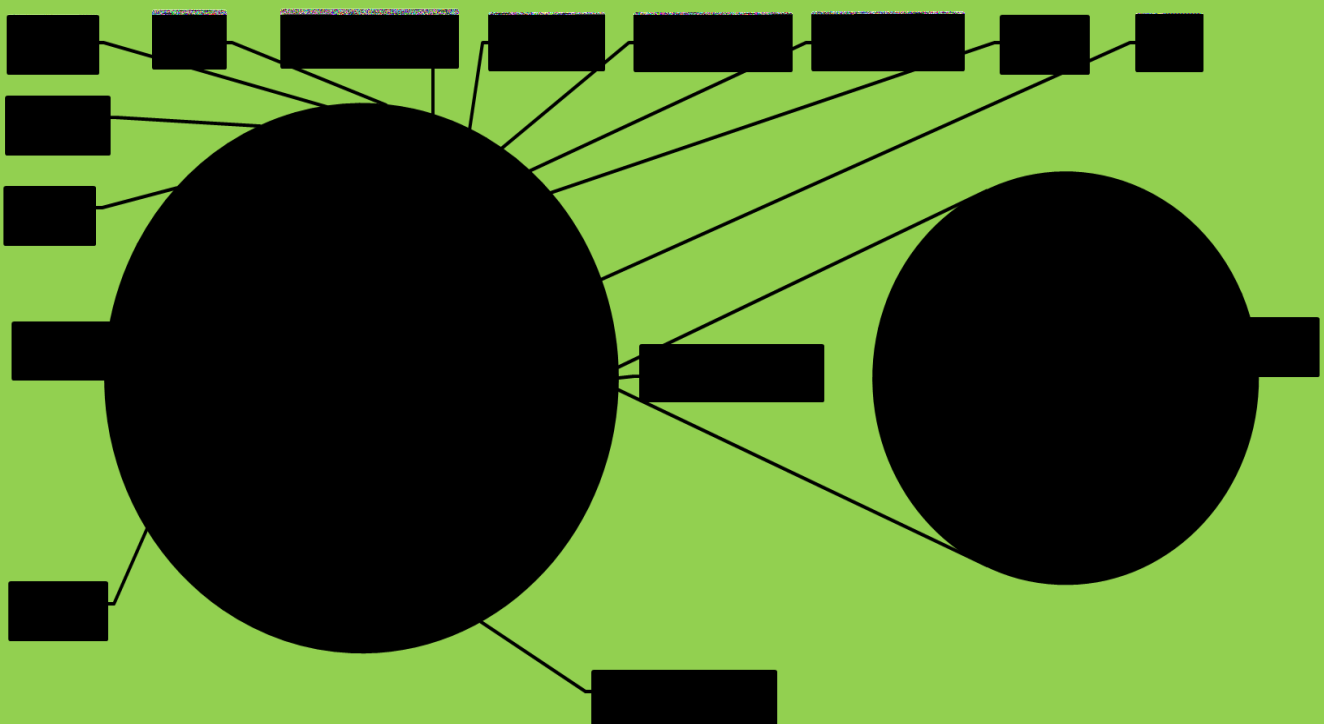


Chart 4. Main airlines to Sri Lanka, January 2023





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

January 2023

As seen in the below tables, the main last departure airports and airlines for tourists visiting Sri Lanka vary by their top markets. Indian tourists prefer Sri Lankan Airlines and IndiGo, Russian tourists prefer Azur Air and Aeroflot, and Sri Lankan Airlines is the most popular for tourists from the United Kingdom, Australia, United States, Maldives, Germany, and Canada. The data indicates that tourists from Israel prefer Emirates and Dubai is the main last departure airport. This highlights the significance of destination accessibility in driving tourism.

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

Country	Dubai	Chennai	Doha Qatar	London	Vnukovo	Moscow.	Domodedovo	Paris	Delhi	Abu Dhabi	Mumbai	Male	Singapore	Bangalore	Frankfurt	Kuala Lumpur	Colombo	Sharjah	Melbourne	Bahrain	Others	Total
Russia	4,099	337	475	7	4,473	4,002	3,452	12	152	1,012	12	156	26	12	18	408	0	1,059	4	929	4,609	25,254
India	400	6,790	93	16	0	0	0	3	1,878	12	1,190	43	76	1,133	0	41	3	56	14	6	2,005	13,759
United Kingdom	1,862	279	1,236	3,545	1	1	0	18	70	252	95	131	143	84	3	167	11	33	36	55	461	8,483
Germany	1,619	151	2,292	109	3	2	1	300	67	441	92	88	55	60	980	136	1,111	14	6	61	629	8,217
France	1,430	153	592	73	2	1	0	1,361	28	190	46	72	28	18	68	66	4	6	7	48	647	4,840
Canada	366	311	398	906	2	0	0	658	39	45	152	35	59	90	334	74	5	5	11	2	189	3,681
Australia	132	181	47	48	0	0	0	2	41	31	16	43	1,033	28	1	341	8	7	1,063	3	643	3,668
United States	380	179	767	154	0	1	0	88	94	50	70	90	167	41	16	83	67	18	3	2	366	2,636
Maldives	679	22	6	0	0	0	0	0	11	1	2	972	4	78	0	50	0	0	3	1	374	2,203
Israel	1,054	119	13	3	2	1	1	0	12	254	24	10	17	11	2	2	0	6	0	19	318	1,868

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

Country	Sri Lankan Airlines	Emirates	Azur Air	Qatar Airways	Aeroflot	Indi Go	Fly Dubai	Red Wings	Air India	Air Arabia	Etihad Airways	Gulf Air	Turkish Airline	Air France	Singapore Airlines	Air Asia	Oman Air	Other	Total
Russia	6.41	8.08	31.37	1.80	15.85	0.93	7.38	12.10	0.35	4.21	0.98	3.68	1.56	0.03	0.06	1.18	1.53	2.50	25,254
India	70.40	1.55	0.00	0.56	0.00	17.72	0.37	0.01	6.80	0.41	0.05	0.04	0.04	0.01	0.20	0.13	0.08	1.62	13,759
United Kingdom	53.92	21.29	0.02	14.49	0.01	0.87	0.51	0.00	0.53	0.39	2.79	0.65	0.62	0.14	0.51	1.34	0.44	1.47	8,483
Germany	25.98	18.94	0.05	27.74	0.02	0.90	0.88	0.01	0.49	0.17	3.31	0.74	1.61	0.82	0.23	1.33	1.16	15.64	8,217
France	27.69	28.06	0.19	12.17	0.02	1.24	1.57	0.00	0.66	0.12	2.25	0.99	4.05	12.46	0.41	1.10	1.53	5.50	4,840
Canada	66.01	8.48	0.05	10.40	0.00	1.20	0.35	0.00	0.92	0.14	1.01	0.05	0.22	6.95	0.52	1.20	0.41	2.09	3,681
Australia	61.91	2.54	0.03	1.28	0.00	1.01	0.22	0.00	1.42	0.19	0.74	0.08	0.05	0.03	19.90	4.17	0.30	6.13	3,668
United States	34.98	12.97	0.04	27.43	0.04	3.07	1.29	0.19	1.59	0.68	1.37	0.08	2.43	2.20	4.44	2.01	0.30	4.89	2,636
Maldives	57.06	24.38	0.00	0.27	0.00	0.05	6.08	0.00	0.09	0.00	0.05	0.05	1.32	0.00	0.05	0.54	0.14	9.94	2,203
Israel	15.69	42.61	0.11	0.70	0.05	3.53	17.08	0.05	1.07	0.32	10.87	1.02	6.58	0.00	0.11	0.11	0.00	0.11	1,868



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