

Monthly Tourist Arrivals Report:

October 2023

Sri Lanka Tourism Development Authority

Introduction

The following document provides a synthesis of the most recent October, 2023 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 30th September 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

In October 2023, Sri Lanka experienced a notable increase in the quantity of international tourists arriving, as opposed to the corresponding period in 2022. The number of foreign tourists surged by an impressive 159.8% year-over-year, reaching a total of 109,199 visitors.

Nonetheless, in the month of October, a decline in arrivals was noted, amounting to a 2.4% decrease compared to September. This decline can likely be attributed to the gradual decrease in arrivals from key source markets such as India, China, Australia, and Israel.

Between January and October 2023, Sri Lanka achieved an impressive milestone in cumulative tourist arrivals, exceeding the previous year's figure of 568,258 by reaching a total of 1,125,455 visitors.

In September 2023, Sri Lanka's tourism sector saw a significant surge in visitors, with India, Russia, the United Kingdom, Germany, and China emerging as the leading source markets. These countries played a crucial role in fueling the increase in tourist arrivals, making a substantial contribution to the overall revival of Sri Lanka's tourism industry

Table 1. Monthly tourist arrivals, October 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	105,498	67.5
May	30,207	83,309	175.8
June	32,856	100,388	205.5
July	47,293	143,039	202.4
August	37,760	136,405	261.2
September	29,802	111,938	275.6
October	42,026	109,199	159.8
November	59,759	-	-
December	91,961	-	-
TOTAL	719,978	1,125,455	-



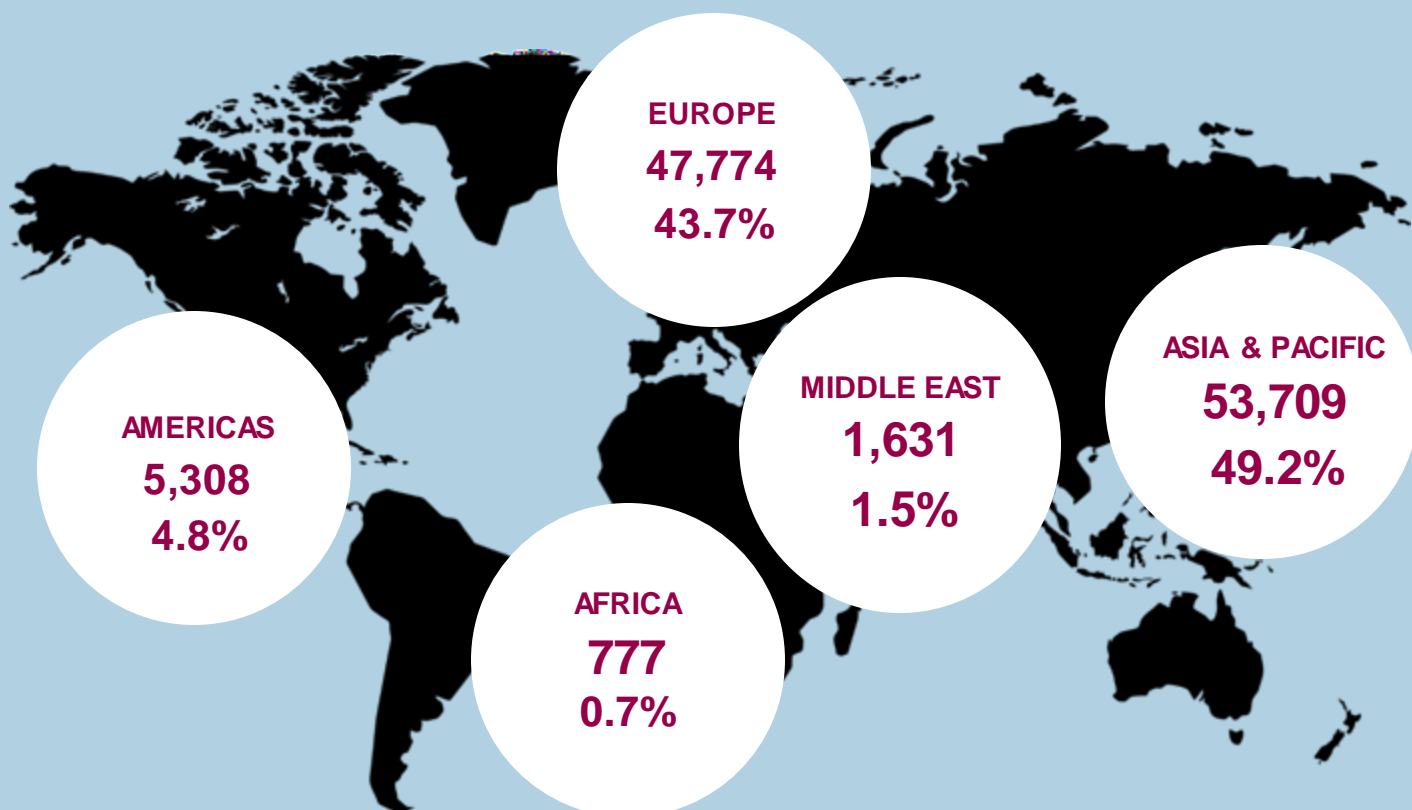
Tourist Arrivals | October 2023

109,199



Tourist arrivals by region and percentage share October 2023

Map 1. Tourist arrivals by region and percentage share



Sri Lanka witnessed a significant impact from Asia and the Pacific, constituting a substantial portion of tourists, making up 49.2% of the total arrivals. Simultaneously, Europe assumed the lead as the primary source market for tourists coming to Sri Lanka, representing 43.7% of the overall influx. This shift in the origins of tourists highlights the evolving dynamics within Sri Lanka's tourism industry, with Asia and the Pacific playing a substantial role and Europe emerging as a crucial source of tourists.

The increase in tourism can be attributed to the growing demand from countries like India, Russia, China, the United Kingdom, and Germany, all of which have played a substantial role in strengthening Sri Lanka's tourism sector.

To explore these contributions further, the Americas have constituted 4.8% of the overall tourist arrivals, whereas the Middle East has provided 1.5%. Each of these regions has played unique and discernible roles in shaping the characteristics of Sri Lanka's tourism environment.

The outlook for September to December 2023 suggests an ongoing recovery, as indicated by the most recent UNWTO Confidence Index. However, this recovery is expected to occur at a more moderate rate compared to the peak travel season of June to August. The demanding economic circumstances may impact spending habits for the rest of the year, with tourists showing a growing preference for value-for-money options, choosing to travel nearer to their homes, and taking shorter trips.



Top primary markets and top potential markets

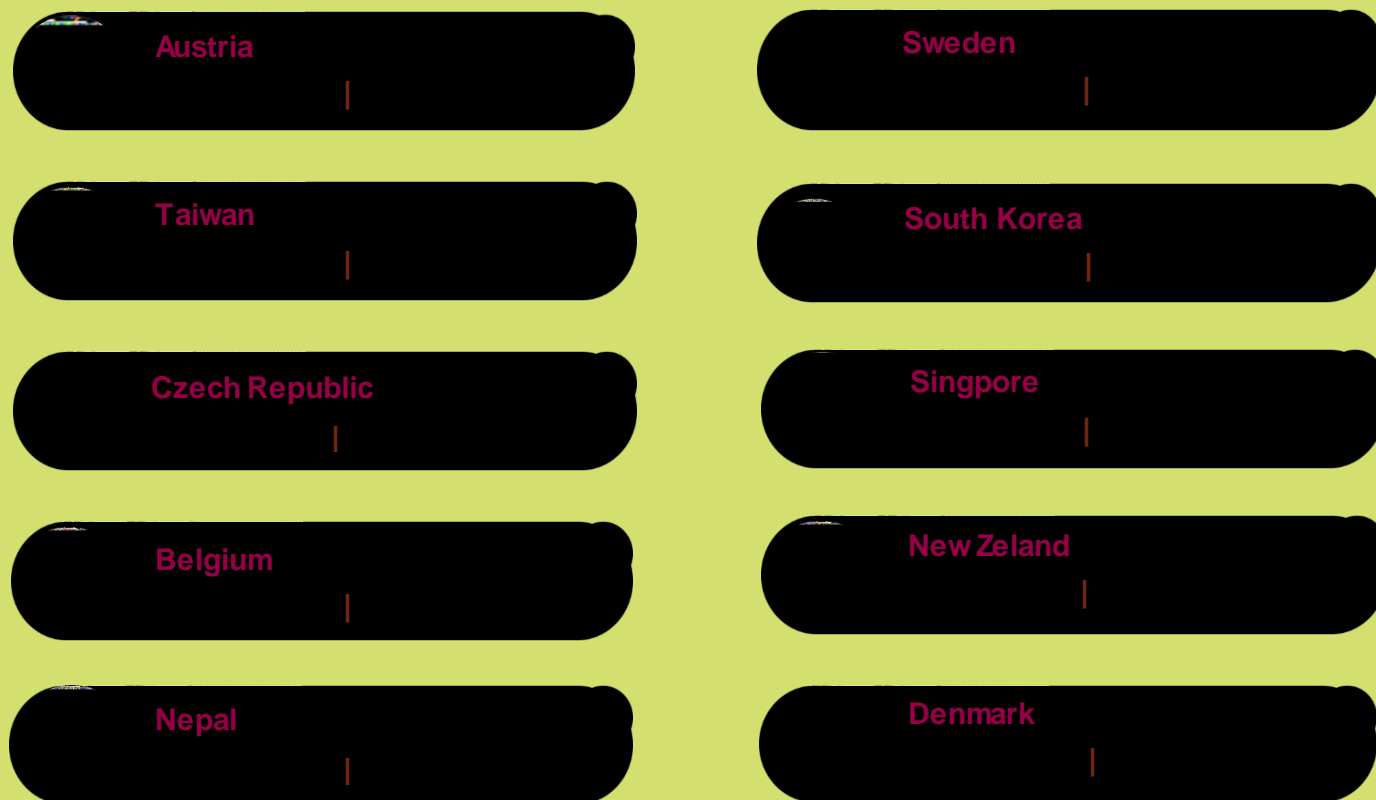
Top primary markets, October 2023



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, October 2023



Note: The top potential 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

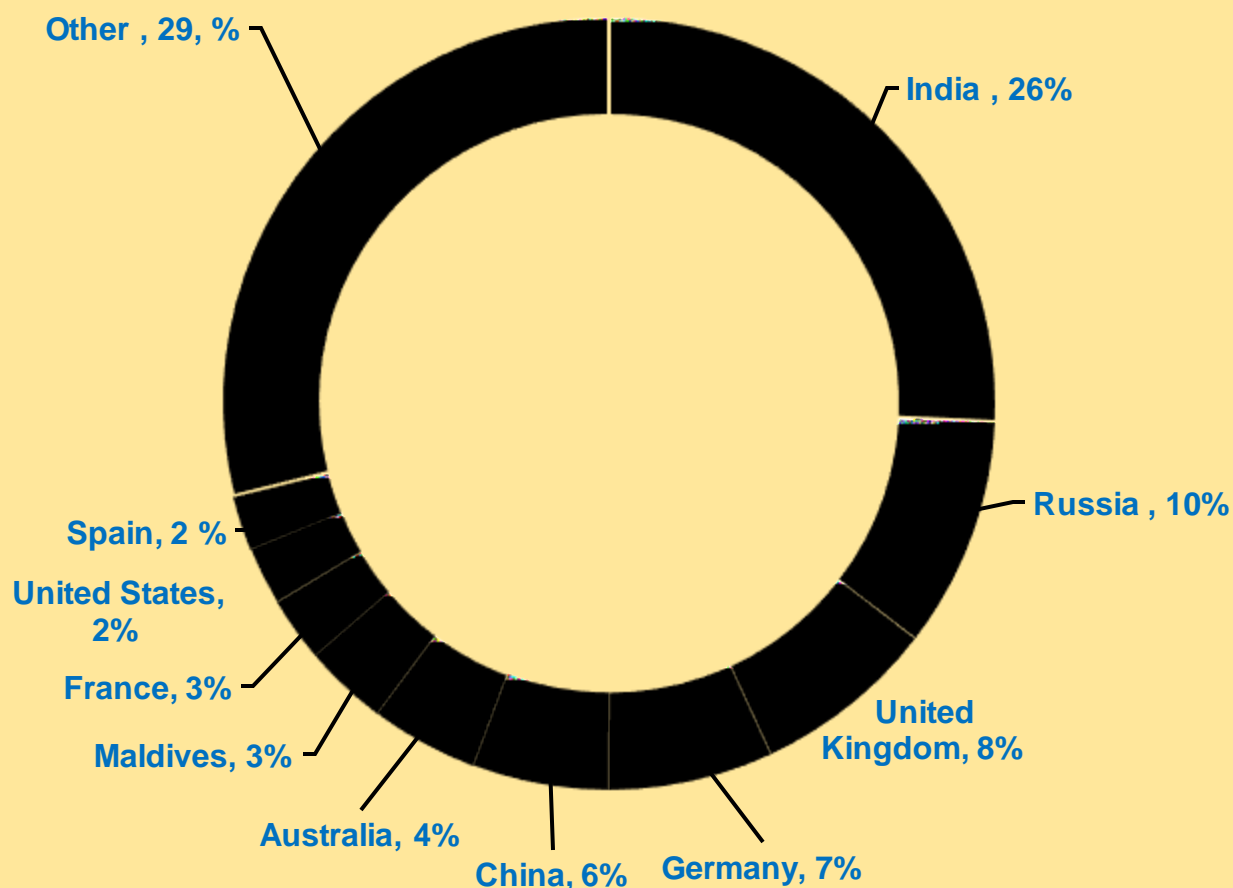
October 2023

In the month of October, India took the lead as the primary source of tourism to Sri Lanka, accounting for 26% of the total arrivals. Following closely were Russia, the United Kingdom, Germany, and China, with each contributing 10%, 8%, 7%, and 6%, respectively. These statistics reflect changing preferences and travel patterns. Notably, there has been an increase in arrivals from China, India, Spain, and Germany in comparison to October last year, indicating a shift towards emerging destinations.

Several factors, such as improved air connectivity, favorable local conditions, geographical proximity, and geopolitical considerations, have collectively established these countries as the primary contributors to Sri Lanka's tourism.

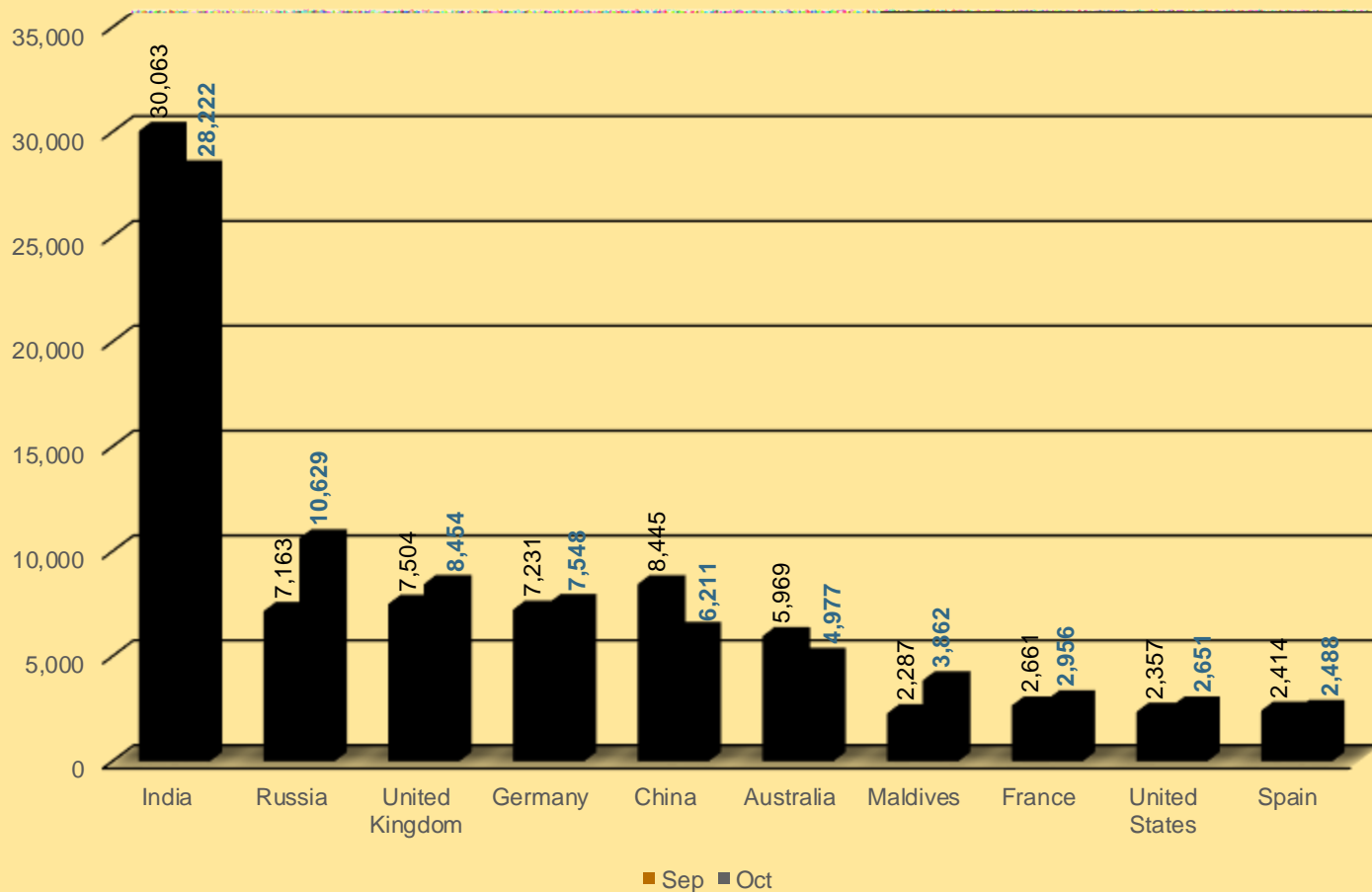
The growth rates of tourist arrivals from different countries have been influenced by global and local dynamics. India, Spain, Germany, and Australia have experienced significant growth in arrivals, while Russia, the United Kingdom, and the Maldives have shown the slowest growth rates compared to October 2022. This variation in growth rates can be attributed to evolving trends and responses to the current global and local conditions.

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



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

Rank	Country of Residence	Tourist Arrivals (October 2023)			Tourist Arrivals (October 2022)
		By Air	By Sea	Total	
1	India	28,222	0	28,222	8,862
2	Russian Federation	10,629	0	10,629	6,189
3	United Kingdom	8,454	0	8,454	4,275
4	Germany	7,548	0	7,548	2,881
5	China	6,211	0	6,211	468
6	Australia	4,977	0	4,977	2,106
7	Maldives	3,862	0	3,862	1,943
8	France	2,956	0	2,956	1,540
9	United States	2,651	0	2,651	1,253
10	Spain	2,488	0	2,488	799

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



Top ten source markets

January to October 2023

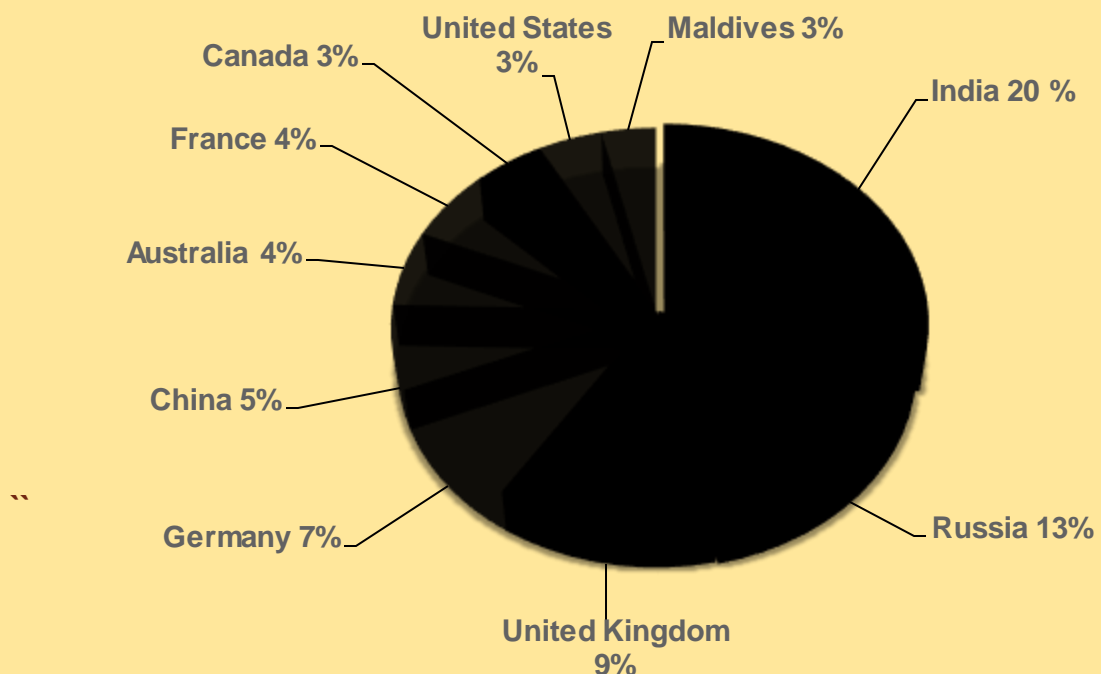
In the period from January to October 2023, Sri Lanka experienced an increase in international tourists from its key source markets compared to the same period in 2022. Notably, there was a significant surge in tourist arrivals from countries like India, China, Russia, the Maldives, the United States, and Australia during this timeframe, making a substantial contribution to the overall growth in tourist arrivals in Sri Lanka for the first ten months of 2023.

However, it's important to note that tourist arrivals from the United Kingdom, France, Germany, and Canada showed a decrease when compared to the same period last year. This suggests changing travel preferences and patterns for these specific regions.

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

Rank	Country of Residence	Tourist Arrivals (Jan. – Oct .2023)	Tourist Arrivals (Jan. – Oct.2022)
1	India	228,532	95,487
2	Russian Federation	142,929	57,489
3	United Kingdom	99,297	72,802
4	Germany	76,461	45,389
5	China	53,842	3,489
6	Australia	48,689	22,827
7	France	46,860	30,976
8	Canada	37,626	22,233
9	United States	34,001	16,503
10	Maldives	28,940	13,810
11	Others	328,278	187,253
Total		1,125,455	568,258

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





Tourist arrivals by purpose of visit

October 2023

An analysis of the reasons behind tourists' visits to Sri Lanka reveals distinct patterns in their motivations. The majority, constituting 59% of all visits, chose Sri Lanka as a destination for leisure and vacation, emphasizing its popularity as a top choice for those in search of relaxation and enjoyable experiences. Additionally, 12% of tourists came to reconnect with friends and relatives, emphasizing Sri Lanka's ability to attract individuals with personal connections or a desire to nurture relationships with loved ones residing there.

In contrast, business-related purposes accounted for a mere 6% of tourist visits, indicating a relatively small segment of visitors arriving for professional engagements. Furthermore, 5% of tourists arrived in Sri Lanka for MICE (Meetings, Incentives, Conferences, and Exhibitions) purposes, highlighting the country's growing reputation as a venue for such events. Additionally, niche interests were represented, with 0.6% and 0.036% visiting for health/Ayurvedic and educational purposes, respectively. These findings underscore Sri Lanka's multifaceted appeal and highlight its attractiveness as a destination that caters to a wide range of traveler preferences and goals.

In October, across all major markets, the primary reason for visiting Sri Lanka was leisure. Specifically, the data shows that a significant proportion of tourists from key source markets, including India (69%), Russia (37%), the United Kingdom (52%), Germany (70%), China (83%), Australia (47%), France (63%), the United States (46%), and Spain (82%), chose Sri Lanka as a destination for recreational purposes. This data underscores the country's strong appeal as a place for relaxation and enjoyable experiences.

As illustrated by the purpose of visits statistics, October is not the favored month for visiting friends and relatives in Sri Lanka. Only 33% of British tourists, 39% of Australian tourists, 28% of American tourists, and 19% of French tourists primarily chose Sri Lanka as a destination to reconnect with friends and relatives.

In addition, 13% of Indian tourists and 12% of Spanish visitors traveled to Sri Lanka for MICE (Meetings, Incentives, Conferences, and Exhibitions) purposes. Furthermore, 6% of German tourists journeyed to Sri Lanka with the specific intention of seeking health-related services.

Chart 4: Purpose of visit

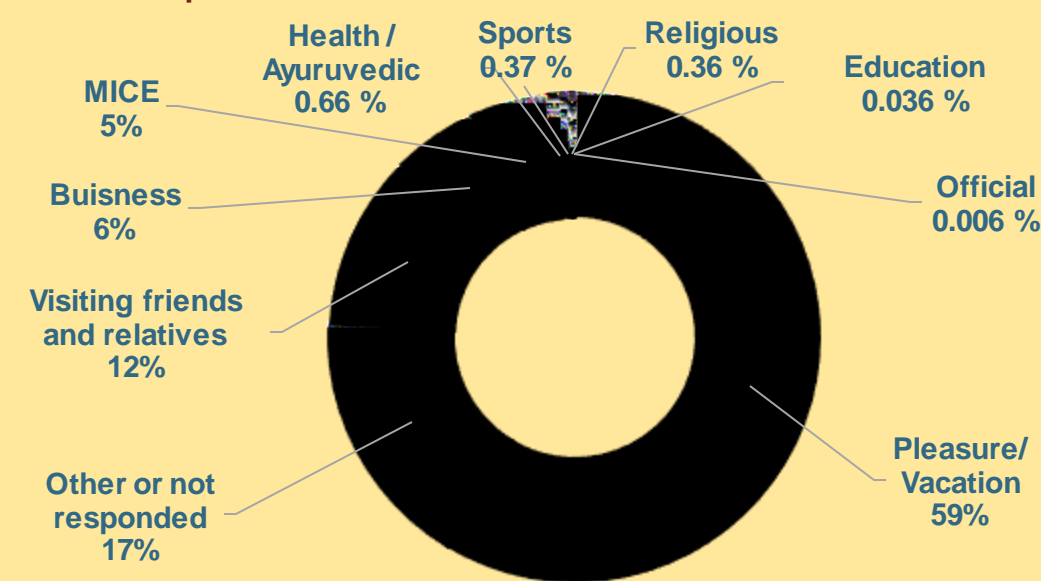
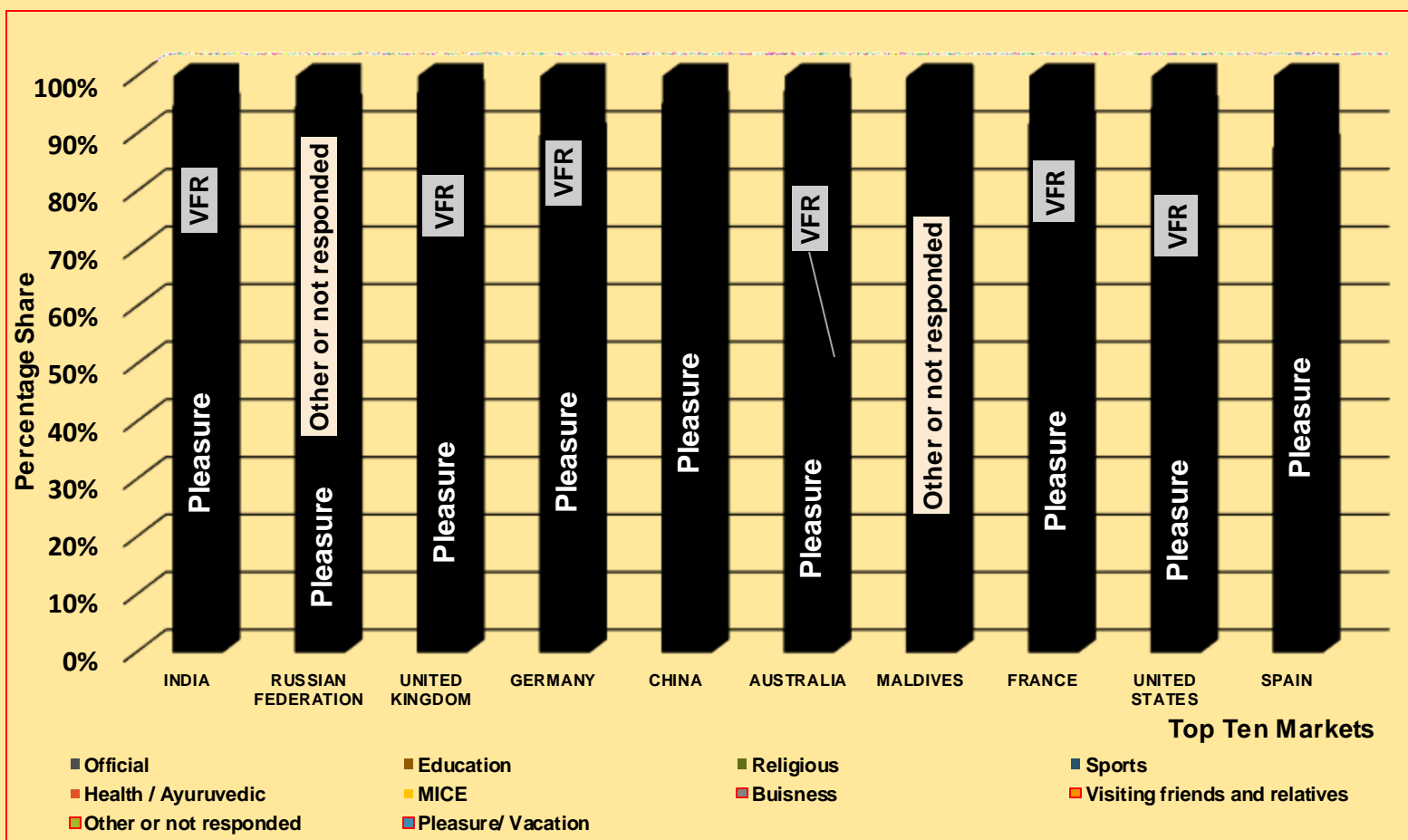




Chart 5 : Purpose of visit vs main source markets





War's Shadow: The Impact of Israeli Conflict on Sri Lanka's Tourism

Israelis are renowned for their adventurous and wanderlust-filled nature, always eager to venture beyond their borders to explore the world, embrace diverse cultures, and embark on thrilling journeys. Notably, Israel's outbound travel sector has been experiencing remarkable growth. From 2010 to 2019, the number of Israeli international air travel increased more than twofold, surging from 3.6 million to 8.3 million, reflecting an impressive average annual growth rate of 10%(Ketter, n.d).

Israel stands out globally as a leader in the proportion of its population that seeks international adventures. Out of the approximately 9 million Israeli citizens, an astonishing 4.3 million took their travels overseas in 2019. The momentum continued into the first half of 2023 (January to June), with Israelis embarking on 4.5 million international journeys, surpassing the levels recorded in the previous peak year of 2019(Ketter, n.d.).What's striking is the diversity in age groups represented among these travelers, with around 20% of all international travelers from Israel being under the age of 20, underlining the broad appeal of outbound travel.

However, the ongoing conflict between Israel and Palestine has the potential to temporarily dissuade many adventure-seekers from pursuing their international travel dreams for tourism.

Israel plays a pivotal role as a source of tourism for Sri Lanka. Yet, the ongoing conflict between Israel and Palestine holds the potential to exert a considerable influence on outbound tourism from Israel. It has the capacity to discourage or interrupt the travel plans of Israeli citizens.

As of October 31, 2023, the total count of Israeli tourists who have journeyed to Sri Lanka stands at 18,909 while the arrivals recorded for the month of October was 460. However, the daily trend in tourist arrival figures signals a gradual decline in the number of Israeli visitors as depicted in Chart 6.

Chart 6: Israel tourist arrivals from 2012 to October 2023

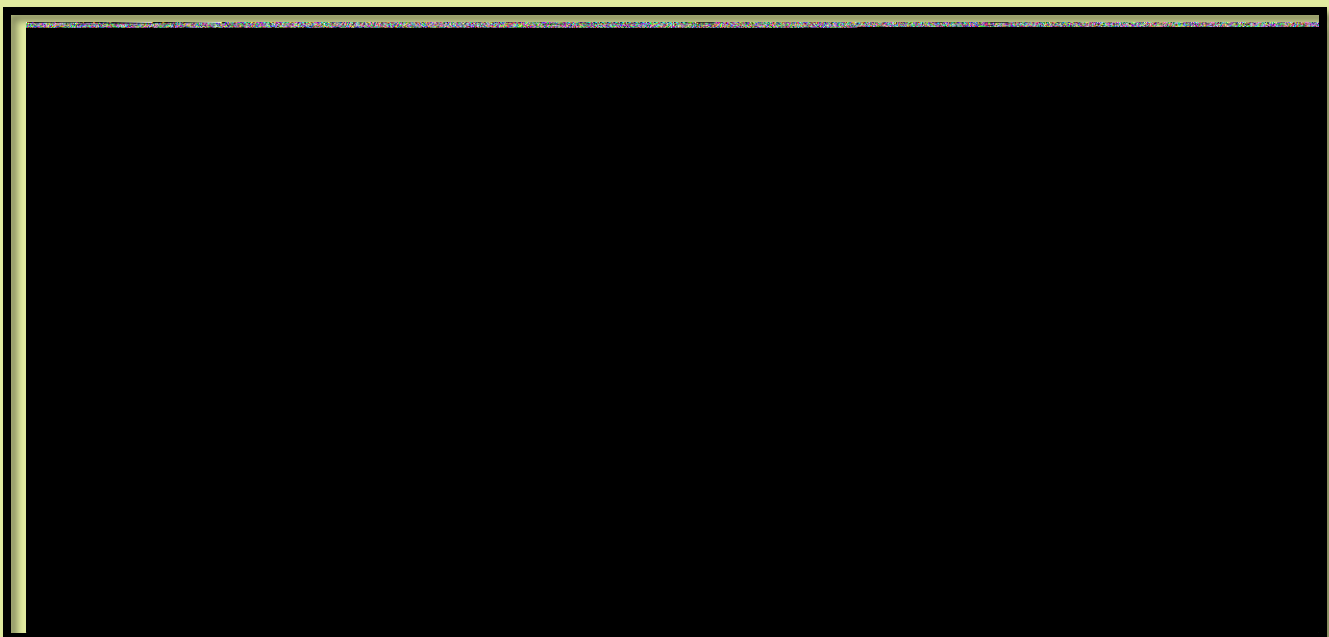
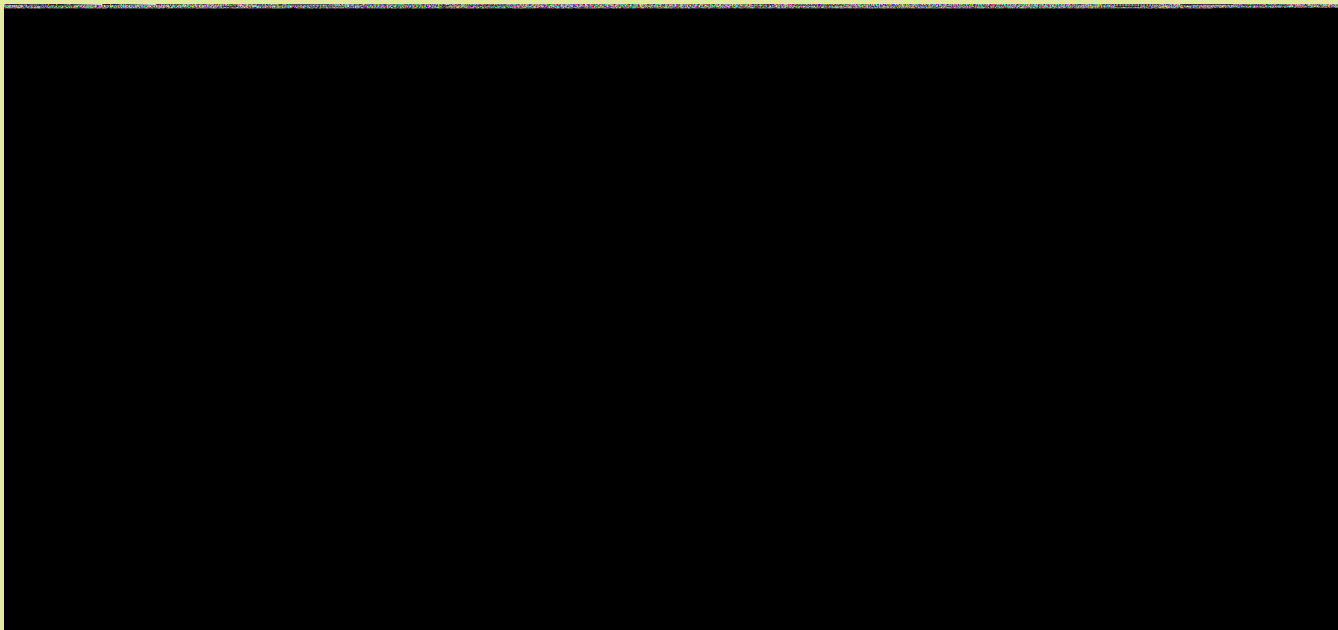




Chart :7 Daily arrival distribution of tourist from Israel



This decline can likely be attributed to various factors.

Travel deterrence: In times of increased military conflict or war, a significant number of Israelis may opt to delay or altogether cancel their international travel arrangements. The apprehension of being far from their homeland during a crisis can discourage people from engaging in outbound tourism. Simultaneously, a substantial portion of the Israeli workforce has been mobilized for active duty, resulting in the removal of more than 300,000 ordinary workers from the economy, as they join the ongoing fight. The reserve force, consisting of approximately 450,000 members, comprises individuals from various segments of Israeli society, many of whom possess greater combat experience than the younger soldiers in the regular army. These reservists encompass a wide range of professions, including educators, technology professionals, startup entrepreneurs, agricultural workers, lawyers, medical practitioners, nurses, individuals from the tourism sector, and factory laborers(Gewirts, 2023).

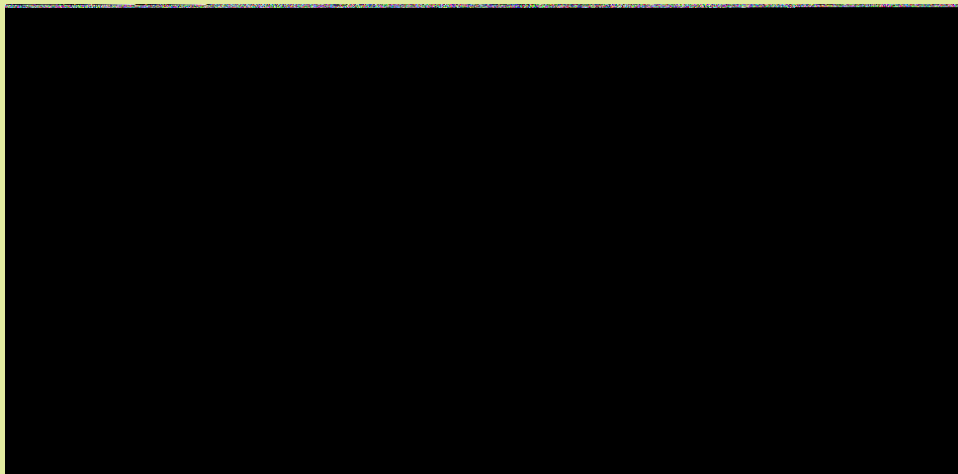
Safety and Security Concerns: In light of the recent tragic incidents involving the deaths of two Israeli tourists in Egypt and incidents of assaults to Israeli's have caused growing worries about the safety and security of Israeli travelers, especially with the escalation of hostilities. These concerns may serve as a deterrent to potential outbound tourists.

Transportation Disruptions: During times of war, transportation infrastructure can face significant disruptions, making it challenging for travelers to access airports, train stations, or border crossings. This can lead to the cancellation or rescheduling of outbound flights and other modes of transportation. Several airlines, including American Airlines, Delta, United Airlines, Air Canada, Air India, and Korean Air, have already suspended or adjusted their air services to Israel (The Economic Times, 2023). Such disruptions could compel outbound travelers to either delay or completely cancel their travel plans. Additionally, the ongoing situation may necessitate the rescheduling of Israeli airline Arkia's inaugural nonstop service between Tel Aviv and Sri Lanka, originally planned for the fourth quarter of this year.



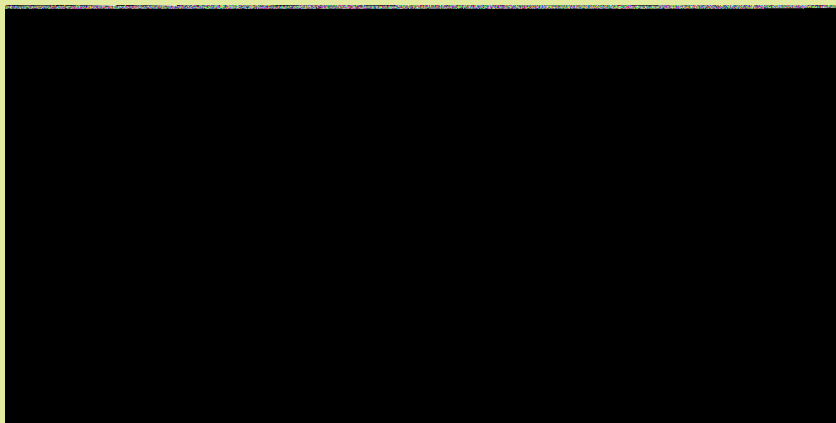
Economic Ramifications: During periods of conflict, the economy can experience a range of adverse effects. This can lead to economic difficulties that impact the cost of living, employment opportunities, and various other aspects. As reported by Reuters(2023), the Bank of Israel has reduced its economic growth projections for 2023 from 3% to 2.3%. Consequently, Israelis may opt to curtail their consumption expenditures and opt to save funds in preparation for unforeseen circumstances arising from the current uncertainty.

Chart 8 : Outbound travel from Israel



Source: Statistica

Chart 9 : Arrivals and Departures, Israel



Source:UNWTO

As depicted in the above chart , remarkably, the Second Intifada of 2000 had a minimal effect on the travel intentions of Israelis, as outbound travel remained largely unaffected and continued to grow steadily, ultimately reaching 8,431,900 travelers in 2022. Hence, it's sensible to expect a gradual resurgence in outbound travel, underscoring the significance of avoiding premature assessments and hasty judgments regarding the complete scale and gravity of the damage resulting from the ongoing conflict

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International tourist arrivals by country of residence

	October 2023			Tourist Arrivals Oct 2022	% Change Oct (23/22) 2023	Total Tourist Arrivals up to October 2023	Total Tourist Arrivals up to Oct 2022	% Change up to Oct (23/22)
	By Air	By Sea	Total					
AMERICAS	5,308	0	5,308	3,020	75.8	75,410	40,528	86.1
North America	5,007	0	5,007	2,907	72.2	72,190	38,973	85.2
Canada	2,302	0	2,302	1,625	41.7	37,626	22,233	69.2
Mexico	54	0	54	29	86.2	563	237	137.6
United States	2,651	0	2,651	1,253	111.6	34,001	16,503	106.0
Carribean & Central America	56	0	56	12	366.7	532	235	126.4
Costa Rica	08	0	08	0	-	46	31	48.4
Jamaica	07	0	07	0	-	42	11	281.8
Others	41	0	41	12	241.7	444	193	130.1
South America	245	0	245	101	142.6	2,688	1,320	103.6
Argentina	49	0	49	17	188.2	564	173	226.0
Brazil	94	0	94	27	248.1	984	521	88.9
Chile	30	0	30	12	150.0	322	136	136.8
Colombia	30	0	30	23	30.4	404	260	55.4
Others	42	0	42	22	90.9	414	230	80.0
AFRICA	777	0	777	267	191.0	7,059	3,586	96.8
North Africa	166	0	166	125	32.8	2,003	1,523	31.5
Morocco	45	0	45	24	87.5	591	348	69.8
Sudan	37	0	37	66	(43.9)	622	741	(16.1)
Others	84	0	84	35	140.0	790	434	82.0
Sub-Saharan Africa	611	0	611	142	330.3	5,056	2,063	145.1
Kenya	42	0	42	15	180.0	457	159	187.4
Mauritius	22	0	22	4	450.0	237	72	229.2
Nigeria	15	0	15	1	1400.0	74	20	270.0
South Africa	232	0	232	58	300.0	2,269	1,119	102.8
Others	300	0	300	64	368.8	2,019	693	191.3



	October 2023			Tourist Arrivals Oct 2022	% Change Oct (23/22)	Total Tourist Arrivals up to Oct 2023	Total Tourist Arrivals up to Oct 2022	% Change up to Oct (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	53,709	0	53,709	16,429	226.9	450,722	161,704	178.7
North East Asia	8,889	0	8,889	1,024	768.1	77,644	7,053	-
China	6,211	0	6,211	468	1227.1	53,842	3,489	-
Japan	1,295	0	1,295	318	307.2	14,154	2,002	607.0
South Korea	604	0	604	211	186.3	5,474	1,284	326.3
Taiwan	761	0	761	24	-	4,072	227	-
Others	18	0	18	3	500.0	102	51	100.0
South East Asia	2,609	0	2,609	1,098	137.6	27,315	8,650	215.8
Cambodia	70	0	70	12	483.3	449	94	377.7
Indonesia	256	0	256	70	265.7	1,858	648	186.7
Malaysia	788	0	788	264	198.5	8,072	1,910	322.6
Myanmar	63	0	63	25	152.0	889	211	321.3
Philippines	318	0	318	162	96.3	3,420	1,576	117.0
Singapore	600	0	600	297	102.0	6,810	2,618	160.1
Thailand	394	0	394	210	87.6	3,905	1,132	245.0
Vietnam	113	0	113	52	117.3	1,770	424	317.5
Others	07	0	07	6	16.7	142	37	283.8
Oceania	5,562	0	5,562	2,357	136.0	54,708	24,870	120.0
Australia	4,977	0	4,977	2,106	136.3	48,689	22,827	113.3
New Zealand	561	0	561	244	129.9	5,821	1,987	193.0
Others	24	0	24	7	242.9	198	56	253.6
South Asia	36,649	0	36,649	11,950	206.7	291,055	121,131	140.3
Afghanistan	05	0	05	0	-	140	21	566.7
Bangladesh	2,456	0	2,456	417	489.0	11,987	2,644	353.4
Bhutan	39	0	39	5	680.0	332	99	235.4
India	28,222	0	28,222	8,862	218.5	228,532	95,487	139.3
Iran	530	0	530	190	178.9	8,639	3,733	131.4
Maldives	3,862	0	3,862	1,943	98.8	28,940	13,810	109.6
Nepal	632	0	632	90	602.2	3,871	758	410.7
Pakistan	903	0	903	443	103.8	8,614	4,579	88.1
EUROPE	47,774	0	47,774	21,343	123.8	568,997	347,612	63.7
Northern Europe	10,747	0	10,747	5,201	106.6	125,543	92,322	36.0
Denmark	556	0	556	265	109.8	8,142	6,415	26.9
Finland	197	0	197	78	152.6	1,462	1,264	15.7
Norway	394	0	394	257	53.3	7,090	5,243	35.2
Sweden	617	0	617	220	180.5	5,577	3,796	46.9
United Kingdom	8,454	0	8,454	4,275	97.8	99,297	72,802	36.4
Others	529	0	529	106	399.1	3,975	2,802	41.9



	October 2023			Tourist Arrivals Oct 2022	% Change Oct (23/22)	Total Tourist Arrivals up to Oct 2023	Total Tourist Arrivals up to Oct 2022	% Change up to oct (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
Western Europe	15,700	0	15,700	6,396	145.5	183,192	108,021	69.6
Austria	778	0	778	239	225.5	7,499	4,498	66.7
Belgium	666	0	666	274	143.1	8,903	5,373	65.7
France	2,956	0	2,956	1,540	91.9	46,860	30,976	51.3
Germany	7,548	0	7,548	2,881	162.0	76,461	45,389	68.5
Netherlands	2,117	0	2,117	559	278.7	24,014	10,382	131.3
Switzerland	1,608	0	1,608	889	80.9	18,932	11,180	69.3
Others	27	0	27	14	92.9	523	223	134.5
Central/ Eastern Europe	16,077	0	16,077	7,585	112.0	193,946	117,578	65.0
Belarus	824	0	824	143	476.2	7,895	2,583	205.7
Czech Republic	681	0	681	150	354.0	7,217	6,466	11.6
Estonia	99	0	99	58	70.7	873	839	4.1
Hungary	211	0	211	66	219.7	2,241	1,888	18.7
Kazakhstan	166	0	166	27	514.8	2,538	7,711	(67.1)
Lithuania	226	0	226	59	283.1	1,836	1,762	4.2
Poland	1,418	0	1,418	307	361.9	11,386	13,869	(17.9)
Romania	299	0	299	110	171.8	2,621	2,760	(5.0)
Russia	10,629	0	10,629	6,189	71.7	142,929	57,489	148.6
Slovakia	394	0	394	87	352.9	3,385	2,027	67.0
Ukraine	305	0	305	136	124.3	3,561	14,113	(74.8)
Others	825	0	825	253	226.1	7,464	6,071	22.9
Southern/ Mediterranean Europe	5,250	0	5,250	2,161	142.9	66,316	29,691	123.4
Greece	135	0	135	52	159.6	1,285	684	87.9
Italy	967	0	967	480	101.5	17,191	5,624	205.7
Portugal	304	0	304	120	153.3	2,859	1,605	78.1
Spain	2,488	0	2,488	799	211.4	18,565	11,156	66.4
Turkey	349	0	349	61	472.1	2,658	1,136	134.0
Israel	460	0	460	557	(17.4)	18,909	7,321	158.3
Others	547	0	547	92	494.6	4,849	2,165	124.0
MIDDLE EAST	1,631	0	1,631	967	68.7	23,267	14,828	56.9
Bahrain	54	0	54	28	92.9	1,046	403	159.6
Egypt	269	0	269	173	55.5	2,275	1,983	14.7
Iraq	49	0	49	44	11.4	771	929	(17.0)
Jordan	218	0	218	181	20.4	3,148	1,960	60.6
Kuwait	85	0	85	58	46.6	1,739	815	113.4
Lebanon	268	0	268	88	204.5	2,692	1,251	115.2
Oman	77	0	77	58	32.8	1,808	635	184.7
Qatar	47	0	47	15	213.3	762	226	237.2
Saudi Arabia	290	0	290	212	36.8	5,632	5,157	9.2
United Arab Emirates	190	0	190	74	156.8	2,455	1,017	141.4
Others	84	0	84	74	13.5	939	452	107.7
TOTAL	109,199	0	109,199	42,026	159.8	1,125,455	568,258	98.1



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

Analyzing the departure airports and preferred airlines of tourists traveling to Sri Lanka underscores the significant importance of air travel in the country's tourism sector. According to data from Chart 10, approximately 36% of tourists chose departure airports in Dubai, Doha, and Chennai as their last stop before reaching Sri Lanka. Furthermore, the top airlines favored by tourists arriving in Sri Lanka were Sri Lankan Airlines, Qatar Airways, and Emirates, collectively accounting for 55% of total tourist arrivals. This underscores the critical role of air transportation in facilitating tourism in Sri Lanka, with specific airports and airlines playing a prominent role in serving a substantial portion of visitors.

Chart 10. Main last departure airports to Sri Lanka, October 2023

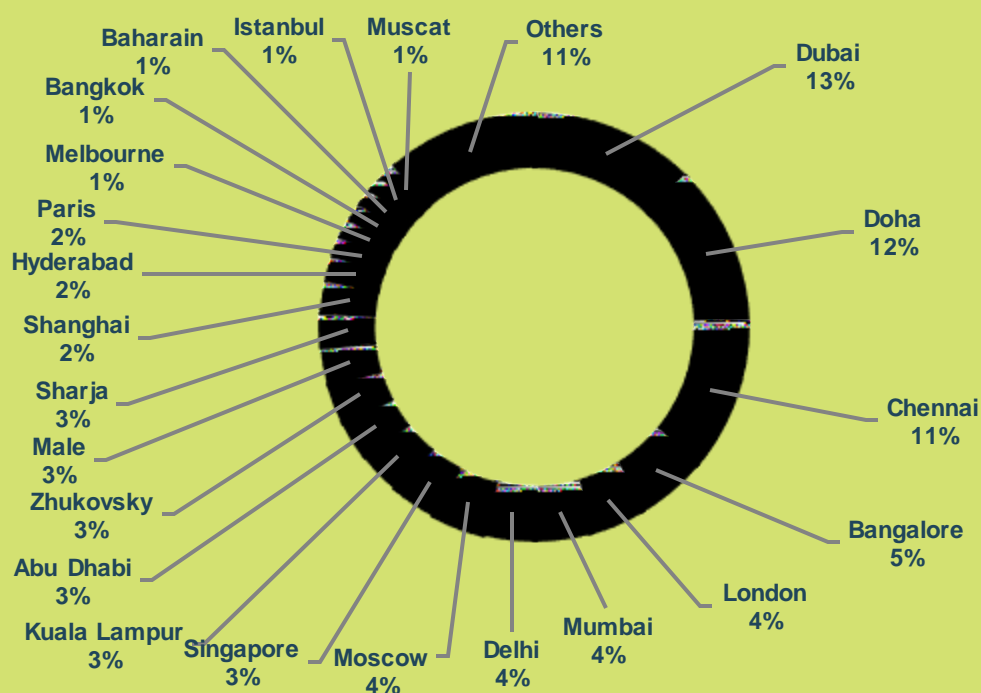
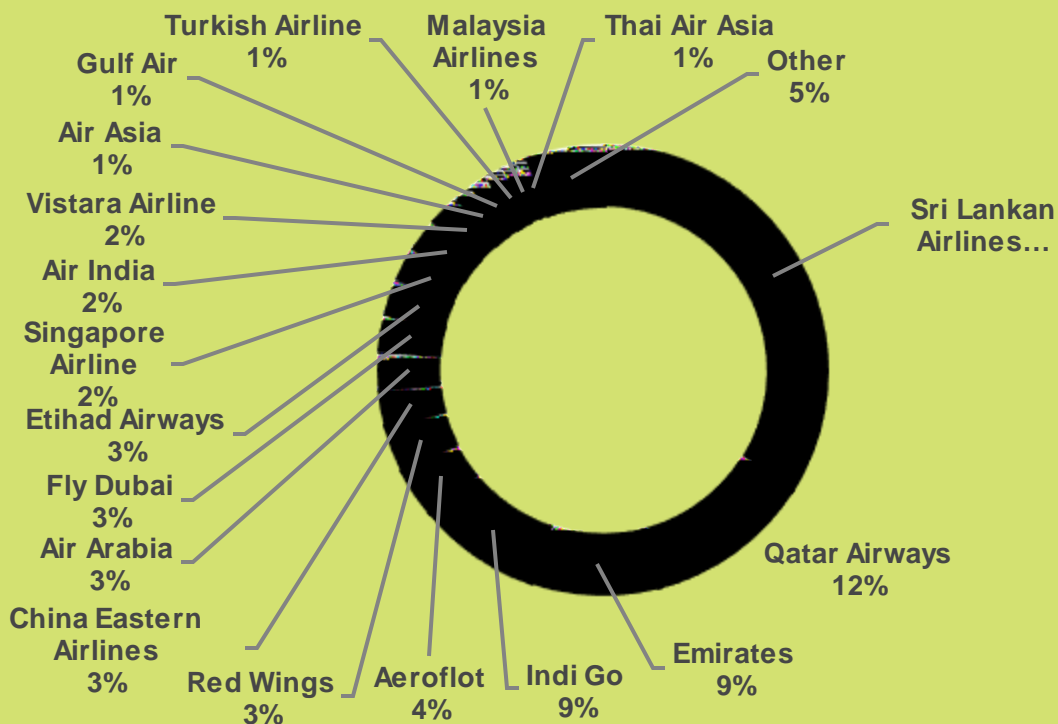


Chart 11. Main airlines to Sri Lanka, October 2023





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

October 2023

Tourists' choices when it comes to airlines and departure airports are heavily influenced by their home countries. For instance, Indian travelers commonly choose Sri Lankan Airlines and IndiGo, while Russian tourists tend to prefer Aeroflot and Red Wings. Conversely, Sri Lankan Airlines is a popular choice among tourists from the United Kingdom, Australia, Maldives, and France. Notably, German, American, and Spanish tourists often opt for Qatar Airways and use Doha as their primary departure hub. Emirates is a favored option for both German and British tourists.

This underscores the vital importance of accessibility in boosting tourism in Sri Lanka. It also emphasizes that tourists' choices regarding airlines and departure airports are significantly shaped by their home countries, highlighting the importance of convenient connections in drawing tourists to Sri Lanka. With the return of operations from airlines like Turkish Airlines in October and the introduction of other charter and scheduled flights in November, including Azur Air, Edelweiss, and Enter Air, the outlook for connectivity and an increase in tourists appears more promising.

Table 6. Top ten markets vs. main airlines to Sri Lanka, October 2023

Table 5. Top ten markets vs. main last departure airports to Sri Lanka, October 2023



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