

Monthly Tourist Arrivals Report:

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

April 2022

Sri Lanka Tourism Development Authority



Introduction

The following document provides a synthesis of the most recent April, 2022 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 30th April 2022, 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

A total of 62,980 international tourist arrivals to Sri Lanka were recorded during April 2022. Tourist arrivals for the month of April have plunged by almost 40.8%, in comparison to March 2022, which recorded the highest number of tourist arrivals up to April, 2022. This could be a result of the effects of the current economic and political

situation in Sri Lanka, and the gradual cessation of the peak travel season.

As of 30th April 2022, 348,314 international tourists had visited Sri Lanka for this year. The largest source markets recorded for the month of April were the United Kingdom, India, and Germany, followed by France and the Russian Federation.

Table 1. Monthly tourist arrivals, April 2022

Month	2018	2021	2022	% change 2022/21	% change 2022/18
January	238,924	1,682	82,327	4,794.6%	(65.5%)
February	235,618	3,366	96,507	2,767.1%	(59.0%)
March	233,282	4,581	106,500	2,224.8%	(54.3%)
April	180,429	4,168	62,980	1,411.4%	(65.1%)
May	129,466	1,497	-	-	
June	146,828	1,614	-	-	
July	217,829	2,429	-	-	
August	200,359	5,040	-	-	
September	149,087	13,547	-	-	
October	153,123	22,771	-	-	
November	195,582	44,294	-	-	
December	253,169	89,506	-	-	
TOTAL	2,333,796	194,495	348,314		

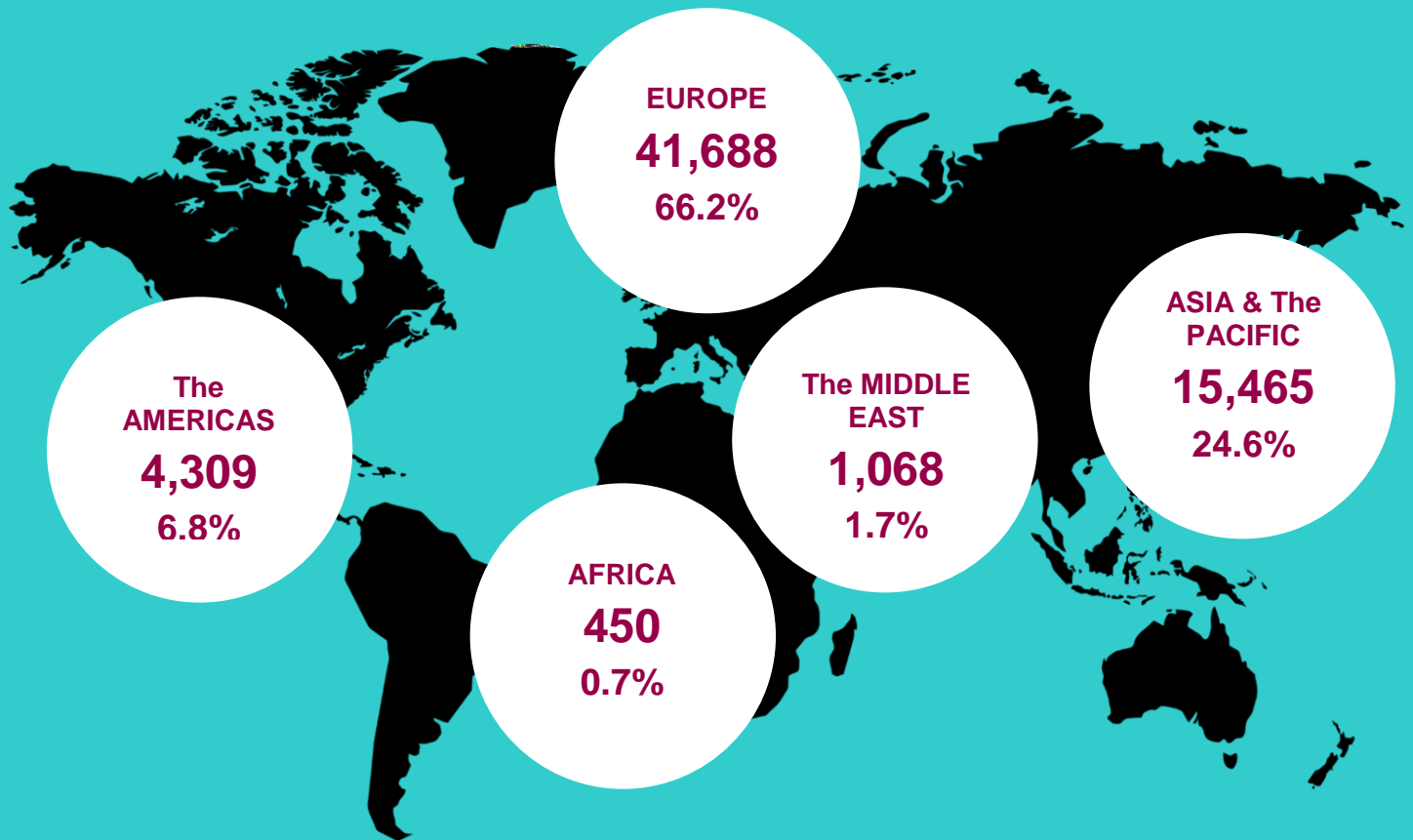


Tourist Arrivals | April 2022
62,980



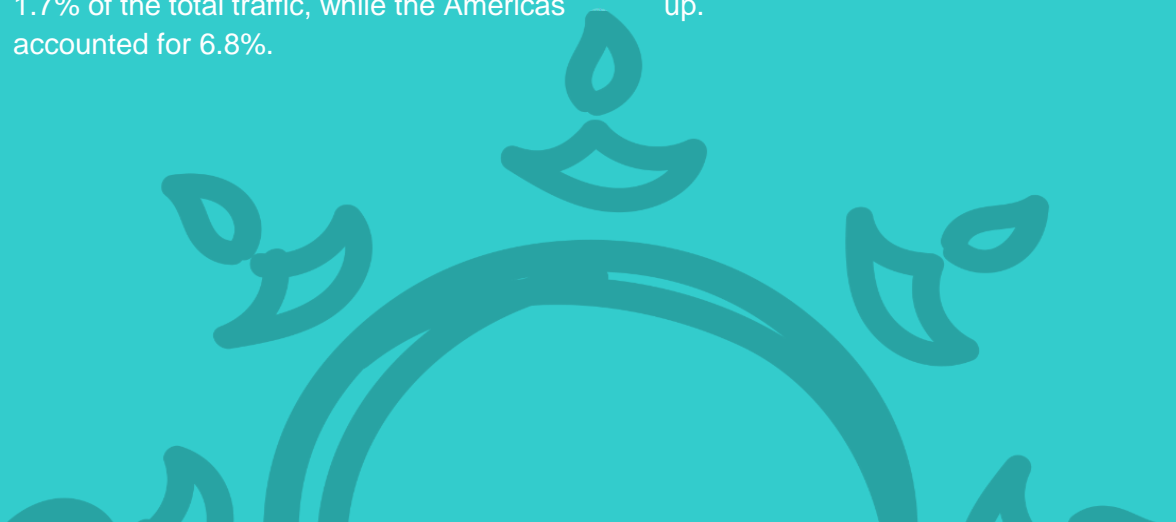
Tourist arrivals by region and percentage share April 2022

Map 1. Tourist arrivals by region and percentage share, April 2022



Europe became the largest source of tourist traffic to Sri Lanka with 66.2% of the total arrivals in April 2022. Pent up demand especially from countries such as the United Kingdom, Germany and France is likely to have driven this growth. Asia and the Pacific accounted for 24.6% of total arrivals. The Middle East accounted for 1.7% of the total traffic, while the Americas accounted for 6.8%.

The gradual improvement in international travel was once again threatened by external factors such as the Russian invasion of Ukraine, coupled with the related challenging economic environment, and internal factors such as the economic crisis in Sri Lanka undermining consumer confidence, which was gradually building up.





Top primary markets and top potential markets

April 2022

Top primary markets

United Kingdom	Spain
India	Norway
Germany	Italy
France	Austria
Russia	Sweden
Australia	China
Canada	Japan
United States	Saudi Arabia
Switzerland	South Korea
Netherlands	UAE

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).



Top Potential markets

Poland	South Africa
Israel	Malaysia
Czech Republic	Finland
Portugal	Thailand
Singapore	Taiwan

Note: The top 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 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).



Top ten source markets

April 2022

The United Kingdom, India, Germany, France and the Russian Federation were Sri Lanka's top five international tourist generating markets for the month of April this year. The United Kingdom was the largest source of tourist visits to Sri Lanka with 18.0% of the total traffic received in April. India and Germany accounted for 14.0% and 10.0% of the total traffic respectively, while France and the Russian Federation accounted for 6.9% (both). India being a major source market to Sri Lanka, saw a considerable decline of 62.6% of tourist arrivals compared to March. With the easing of travel protocols such as the scrapping of the "Test and Go" policy, and the lowering of travel insurance costs, Thailand has its sights set on

increasing growth from India (Bhutia, 2022). With the current internal economic and political crisis, combined with this kind of increased promotional initiatives by regional competitors, Sri Lanka faces increased challenges in wooing Indian travel consumers in the near future.

Growth in arrivals from countries in Asia and the Pacific, and Western, Central & Eastern Europe, suggests a revitalization of leisure tourism & VFR, potentially enabled by factors such as the gradual improvement of traveller confidence, the lifting of travel restrictions, the gradual shrinking number of cases of the Omicron variant, and the gradual containment of the pandemic in Sri Lanka.

Chart 1. Top ten source markets to Sri Lanka, April 2022

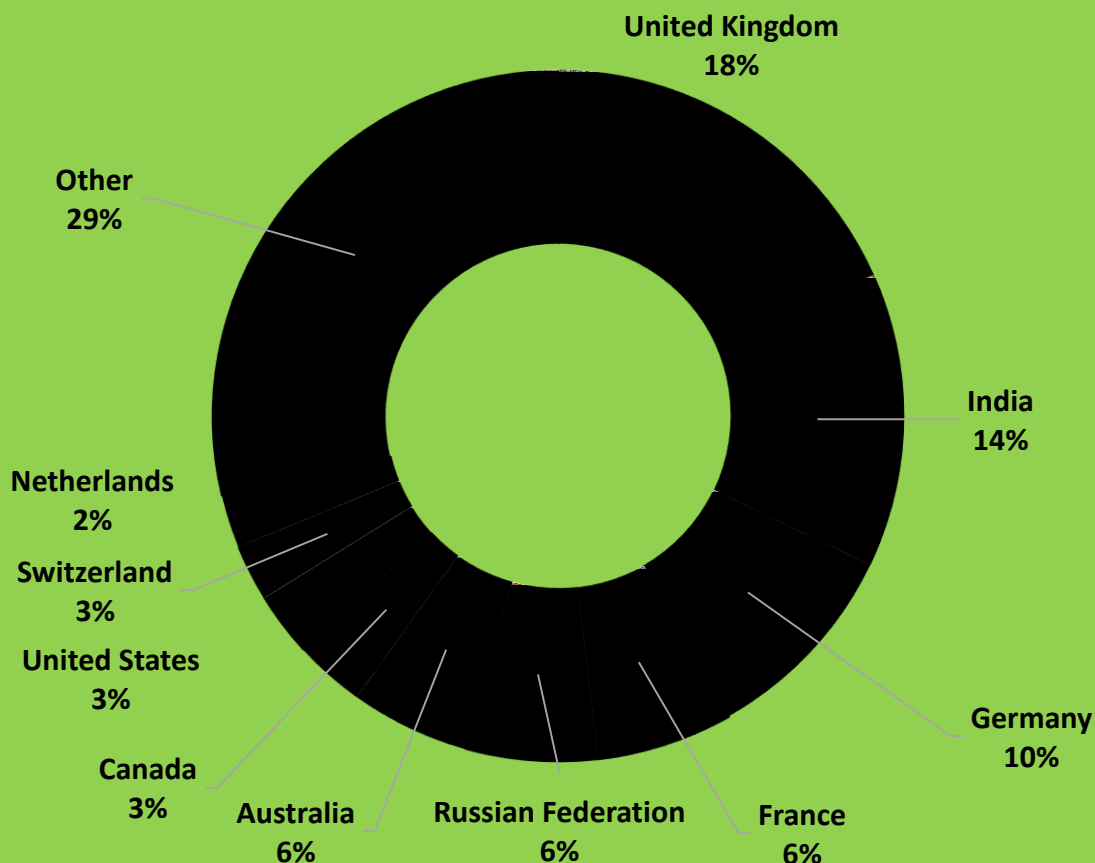




Table 2. Top ten source markets to Sri Lanka, April 2022

Rank	Country of Residence	Tourist Arrivals (April 2022)			Tourist Arrivals (April 2021)
		By Air	By Sea	Total	
1	United Kingdom	11,539	-	11,539	334
2	India	8,678	-	8,678	796
3	Germany	6,088	-	6,088	383
4	France	4,035	-	4,035	84
5	Russian Federation	3,874	-	3,874	173
6	Australia	3,508	-	3,508	60
7	Canada	2,083	-	2,083	144
8	United States	1,872	-	1,872	248
9	Switzerland	1,647	-	1,647	93
10	Netherlands	1,575	-	1,575	52

Top ten source markets, January – April 2022

India, the United Kingdom, the Russian Federation, Germany and France were Sri Lanka's top five international tourist-generating markets from January to April this year. Poland has recorded the highest growth in comparison to January to April 2021.

Table 3. Top ten markets to Sri Lanka, January to April 2021 & 2022 and percentage change

Rank	Country of Residence	Tourist Arrivals (Jan ~ April 2022)	Tourist Arrivals (Jan ~ April 2021)	% Change (Jan - Mar 2022 & Jan - April 2021)
1	India	56,389	1,075	5,145.5
2	United Kingdom	42,531	732	5,710.2
3	Russian Federation	41,591	509	8,071.1
4	Germany	28,768	1,149	2,403.7
5	France	19,091	200	9,445.5
6	Ukraine	13,621	2,639	416.1
7	Poland	12,206	82	14,785.4
8	Australia	10,369	116	8,838.8
9	Canada	8,696	352	2,370.5
10	United States	8,670	515	1,583.5
11	Other	106,382	6,428	1,555.0
Total		348,314	13,797	2,424.6



Chart 2. Top ten source markets to Sri Lanka, January to April, 2022

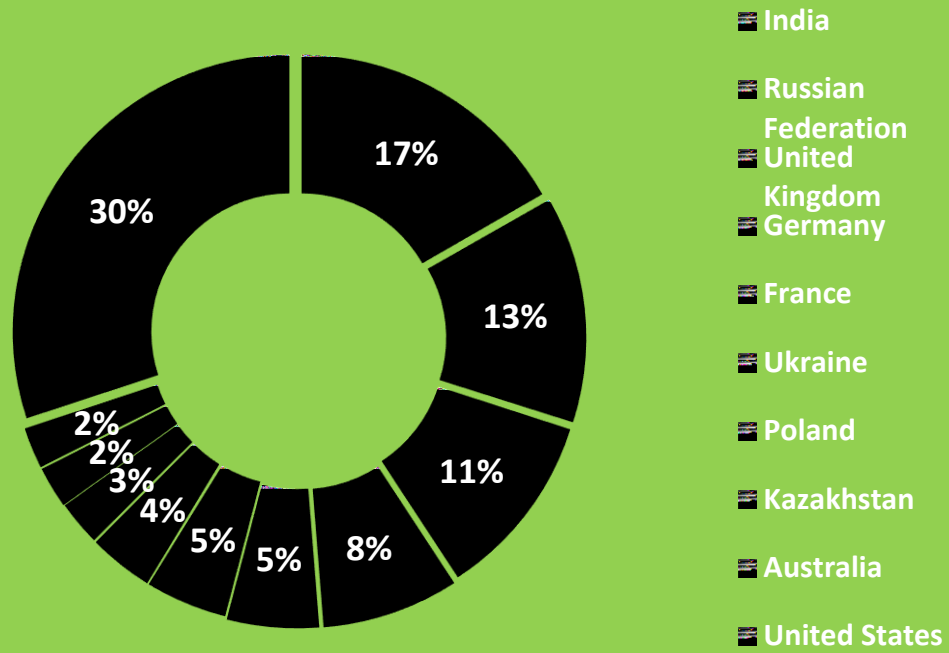
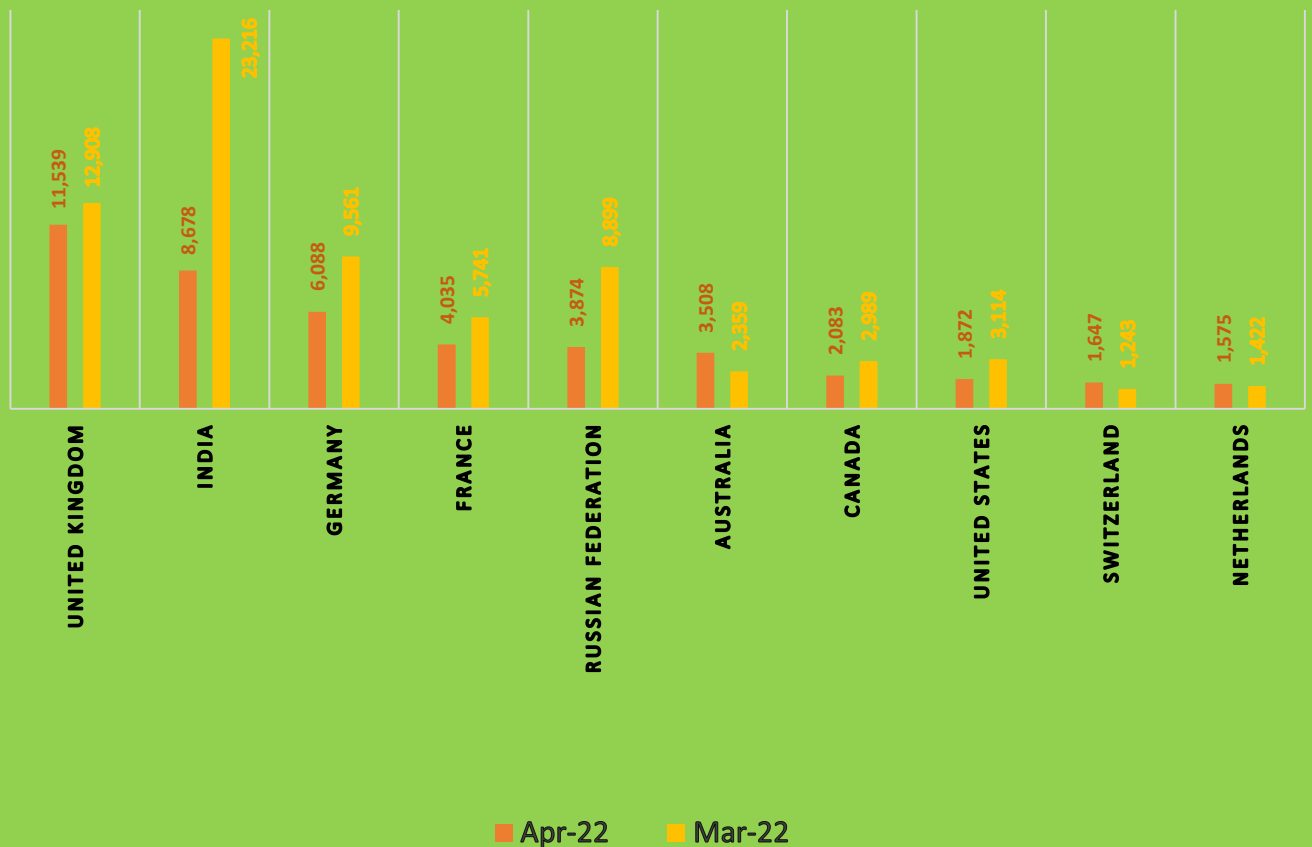


Chart 3. Comparison of arrivals from top ten markets to Sri Lanka, April 2022/ Mar 2022



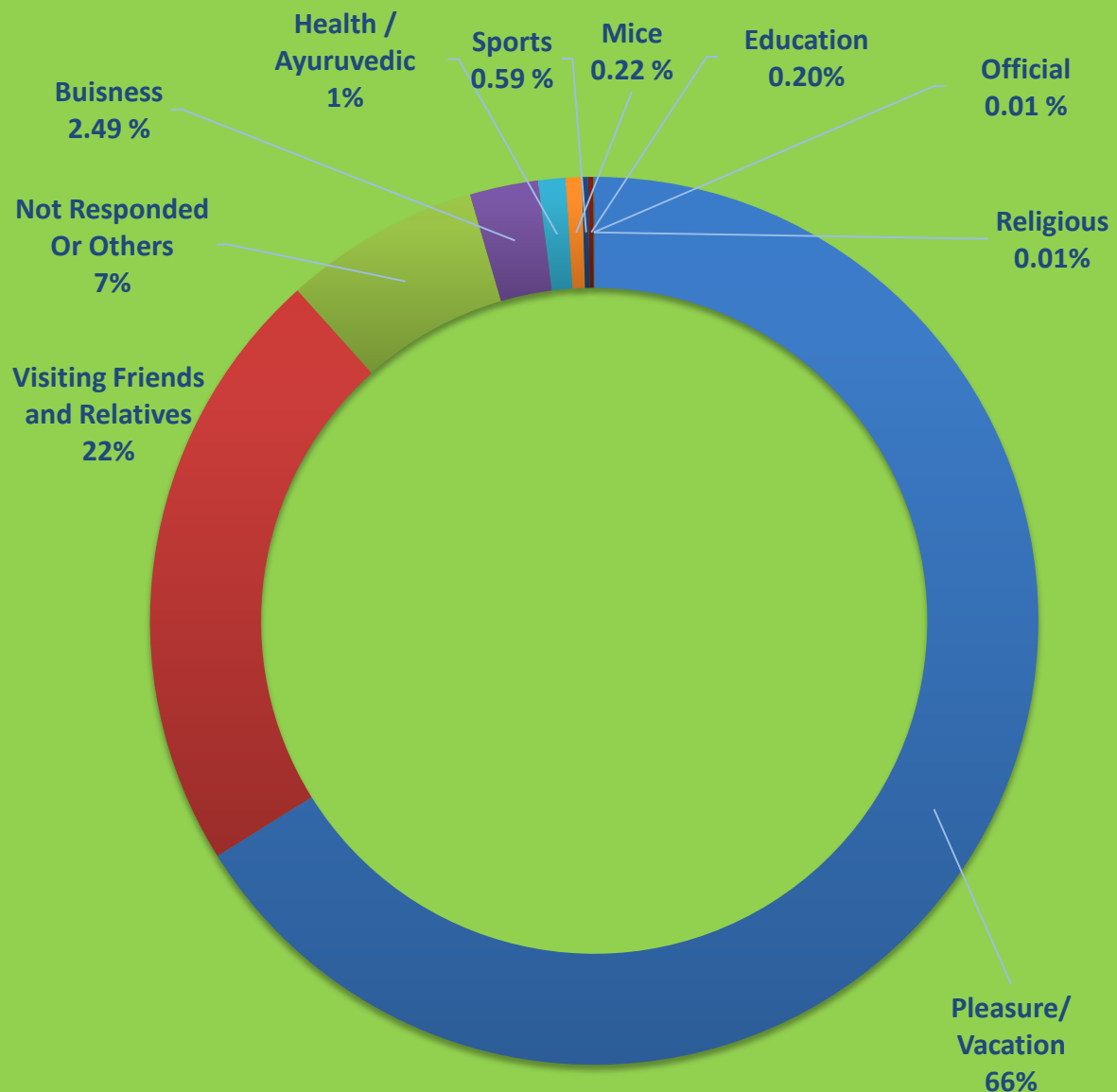


Tourist arrivals by purpose of visit

April 2022

An analysis of tourist arrivals by purpose of visit reveals that a majority (66.0%) of tourists had visited Sri Lanka for pleasure/vacation, while for 22.0% of tourists the main purpose was visiting friends and relatives. Only 2.5% of tourists had visited for business related purposes. 1.0% had visited for health-related purposes, while 0.7% had visited for purposes such as sports and education.

Chart 4. Tourist arrivals by purpose of visit, April 2022





International tourist arrivals by country of residence

	April 2022			Tourist Arrivals April 2021	% Change April (22/21)	Total Tourist Arrivals up to April 2022	Total Tourist Arrivals up to April 2021	% Change up to April (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
AMERICAS	4,309	-	4,309	416	-	18,455	918	-
North America	3,990	-	3,990	393	-	17,498	873	-
Canada	2,083	-	2,083	144	-	8,696	352	-
Mexico	35	-	35	1	-	132	6	-
United States	1,872	-	1,872	248	-	8,670	515	-
Caribbean & Central America	45	-	45	7		148	14	
Costa Rica	5	-	5	-		27	-	-
Jamaica	2	-	2	-	-	8	1	-
Others	38	-	38	7	-	113	13	-
South America	274	-	274	16	-	809	31	-
Argentina	27	-	27	5		119	5	
Brazil	135	-	135	6	-	319	12	-
Chile	12	-	12	-	-	85	1	-
Colombia	61	-	61	4	-	149	9	-
Others	39	-	39	1	-	137	4	-
AFRICA	450	-	450	56	-	2,205	91	-
North Africa	74	-	74	4	-	929	6	-
Morocco	23	-	23	2	-	203	3	-
Sudan	15	-	15	1	-	469	2	-
Others	36	-	36	1	-	257	1	-
Sub-Saharan Africa	376	-	376	52	-	1,276	85	-
Kenya	20	-	20	1	-	100	2	-
Mauritius	12	-	12	0	-	42	3	-
Nigeria	5	-	5	2	-	16	2	-
South Africa	257	-	257	31	-	781	55	-
Others	82	-	82	18	-	337	23	-



	April 2022			Tourist Arrivals April 2021	% Change April (22/21)	Total Tourist Arrivals up to April 2022	Total Tourist Arrivals up to April 2021	% Change up to April (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	15,465	-	15,465	1,490	-	87,971	2,510	-
North East Asia	678	-	678	501	-	2,496	905	-
China	261	-	261	475	-	1,111	842	-
Japan	249	-	249	19	-	689	41	-
South Korea	151	-	151	2	-	572	14	-
Taiwan	16	-	16	5	-	87	8	-
Others	1	-	1	-	-	37	-	-
South East Asia	1,087		1,087	56	-	4,039	128	-
Cambodia	4	-	4	-	-	49	1	-
Indonesia	56	-	56	6	-	324	17	-
Malaysia	244	-	244	8	-	867	15	-
Myanmar	42	-	42	5	-	100	11	-
Philippines	246	-	246	28	-	768	57	-
Singapore	289	-	289	4	-	1,290	9	-
Thailand	123	-	123	3	-	437	11	-
Vietnam	83	-	83	2	-	186	7	-
Others	0	-	0	-	-	18	-	-
Oceania	3,839		3,839	74	-	11,206	145	-
Australia	3,508	-	3,508	60	-	10,369	116	-
New Zealand	329	-	329	14	-	818	29	-
Others	2	-	2	-	-	19	-	-
South Asia	9,861	-	9,861	859	-	70,230	1,332	-
Afghanistan	0	-	0	1	-	18	2	-
Bangladesh	155	-	155	5	-	1,167	14	-
Bhutan	2	-	2	-	-	49	1	-
India	8,678	-	8,678	796	-	56,389	1,075	-
Iran	227	-	227	4	-	3,025	69	-
Maldives	567	-	567	32	-	6,410	118	-
Nepal	94	-	94	3	-	477	5	-
Pakistan	138	-	138	18	-	2,695	48	-
EUROPE	41,688		41,688	2,120		230,819	10,065	-
Northern Europe	14,690		14,690	407	-	55,358	946	-
Denmark	1,307	-	1,307	10	-	4,724	42	-
Finland	169	-	169	10	-	919	19	-
Norway	587	-	587	17	-	2,471	52	-
Sweden	464	-	464	19	-	2,690	50	-
United Kingdom	11,539	-	11,539	334	-	42,531	732	-
Others	624	-	624	17	-	2,023	51	-



	April 2022			Tourist Arrivals April 2021	% Change April (22/21)	Total Tourist Arrivals up to April 2022	Total Tourist Arrivals up to April 2021	% Change up to April (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
Western Europe	14,837	-	14,837	673	-	64,978	1,832	-
Austria	575	-	575	32	-	3,304	94	-
Belgium	846	-	846	22	-	2,722	38	-
France	4,035	-	4,035	84	-	19,091	200	-
Germany	6,088	-	6,088	383	-	28,768	1,149	-
Netherlands	1,575	-	1,575	52	-	5,370	126	-
Switzerland	1,647	-	1,647	93	-	5,571	213	-
Others	71	-	71	7	-	152	12	-
Central/ Eastern Europe	7,938		7,938	899	-	95,833	6,963	-
Belarus	129	-	129	14	-	2,203	81	-
Czech Republic	686	-	686	52	-	5,717	121	-
Estonia	64	-	64	22	-	744	33	-
Hungary	217	-	217	7	-	1,652	19	-
Kazakhstan	122	-	122	440	-	7,582	3,186	-
Lithuania	146	-	146	2	-	1,519	18	-
Poland	1,391	-	1,391	26	-	12,206	82	-
Romania	475	-	475	32	-	2,296	38	-
Russia	3,874	-	3,874	173	-	41,591	509	-
Slovakia	287	-	287	39	-	1,627	79	-
Ukraine	158	-	158	47	-	13,621	2,639	-
Others	389	-	389	45	-	5,075	158	-
Southern/ Mediterranean Europe	4,223	-	4,223	141	-	14,650	324	-
Greece	145	-	145	4	-	475	8	-
Italy	584	-	584	43	-	2,370	102	-
Portugal	295	-	295	8	-	999	16	-
Spain	1,447	-	1,447	30	-	3,900	84	-
Turkey	176	-	176	11	-	806	30	-
Israel	1,228	-	1,228	33	-	4,529	48	-
Others	348	-	348	12	-	1,571	36	-
MIDDLE EAST	1,068		1,068	86	-	8,864	213	-
Bahrain	22	-	22	2	-	210	10	-
Egypt	170	-	170	8	-	1,285	20	-
Iraq	71	-	71	1	-	550	4	-
Jordan	135	-	135	14	-	952	52	-
Kuwait	49	-	49	3	-	420	6	-
Lebanon	305	-	305	45	-	745	99	-
Oman	18	-	18	-	-	339	1	-
Qatar	5	-	5	2	-	79	3	-
Saudi Arabia	225	-	225	1	-	3,650	2	-
United Arab Emirates	51	-	51	7	-	408	11	-
Others	17	-	17	3	-	226	5	-
TOTAL	62,980	-	62,980	4,168	-	348,314	13,797	-



Main last departure airports and airlines to Sri Lanka April 2022

An analysis of the last departure airports to Sri Lanka reveals the vital importance of air connectivity in the tourism industry. As depicted in the below Chart 4, for around 56.0% of tourists the last airports had been Doha, Dubai and Chennai. Further, in terms of airlines, Sri Lankan Airlines, Qatar Airways and Emirates were the top airlines, handling 69.0% of tourists to Sri Lanka.

Chart 5. Main last departure airports to Sri Lanka, April 2022

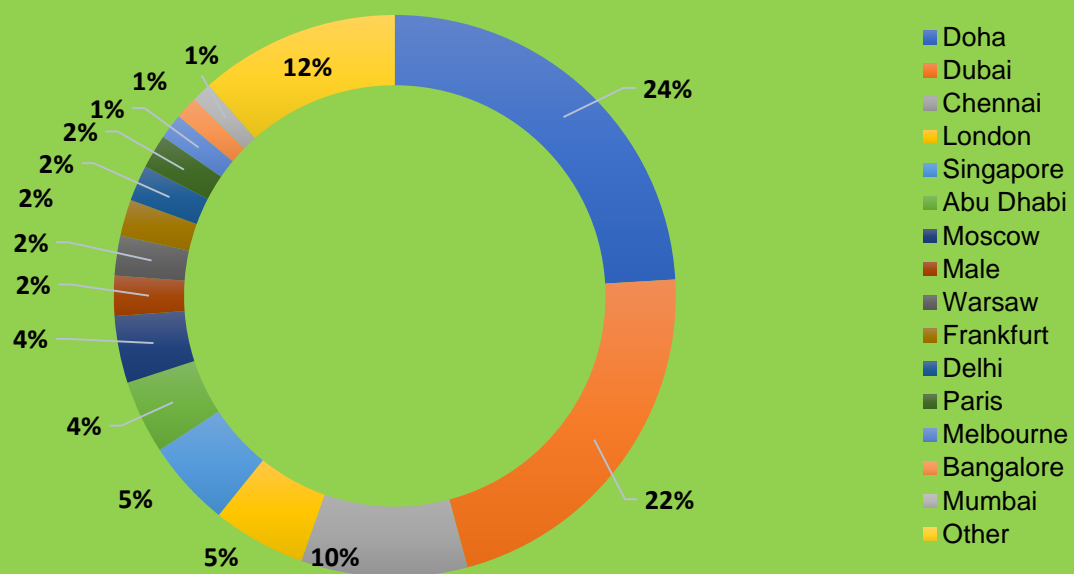
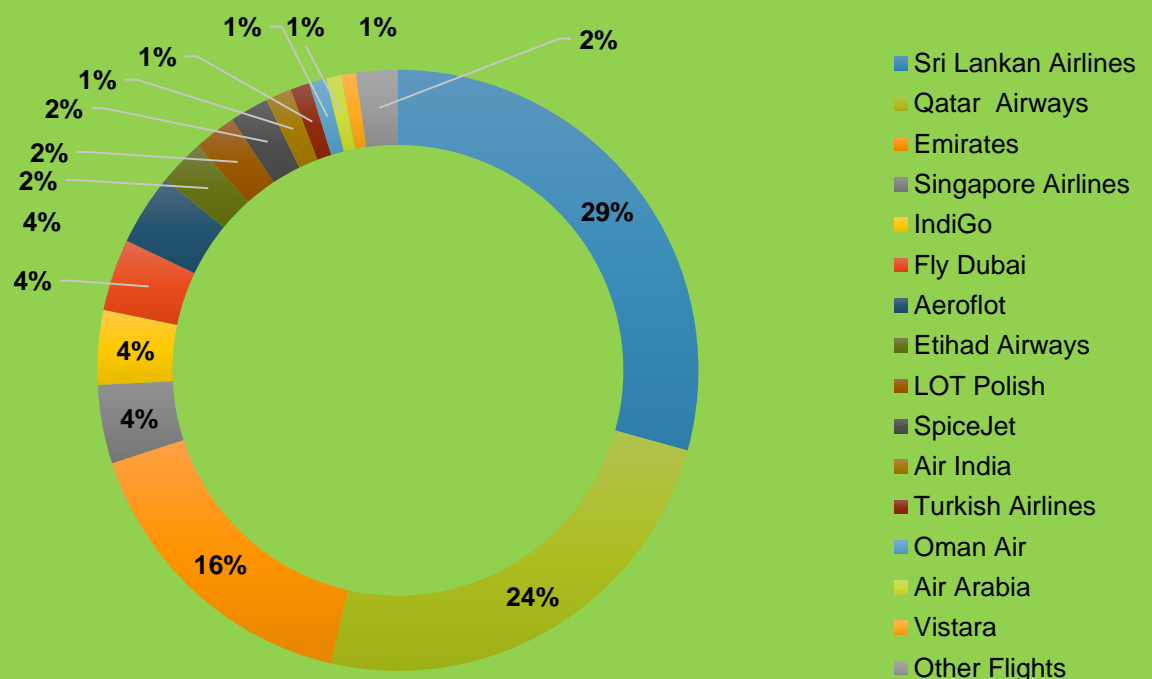


Chart 6. Main airlines to Sri Lanka, April 2022





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

April 2022

The below tables depict the main last departure airports and airlines analysed by top markets to Sri Lanka. Sri Lankan Airlines and IndiGo are the most popular airlines for Indians. Russian tourist arrivals which recorded a decline in early April have gradually improved with the resumption of the direct Aeroflot flight, highlighting the importance of destination accessibility in driving visitation. For a majority of travellers from Germany, France, Canada, the United States and Switzerland, Qatar Airways is the most preferable airline and Doha is the main last departure airport.

Table 4. Top ten markets vs. main last departure airports to Sri Lanka, April 2022

Country	Number of Passengers																				Total
	Doha	Dubai	Chennai	Singapore	London	Abu Dhabi	Moscow	Male	Warsaw	Frankfurt	Delhi	Dubai/Male	Paris	Melbourne	Bangalore	Mumbai	Kuala Lumpur	Muscat	Istanbul/Male	Other	
United Kingdom	3,527	2,566	80	337	2,880	437	0	172	89	10	49	358	21	15	10	32	59	111	27	874	11,539
India	32	156	5,575	45	7	22	0	35	3	0	800	7	1	6	664	482	3	9	0	840	8,687
Germany	2,167	1,264	24	108	60	767	1	103	198	953	33	61	15	0	30	57	20	176	29	294	6,360
France	1,388	929	22	114	46	303	0	36	14	18	33	101	867	0	12	12	24	123	12	86	4,140
Russian Federation	150	647	9	12	1	291	2,381	23	9	5	13	65	1	0	11	0	5	6	7	331	3,967
Australia	51	166	28	1,667	18	40	0	43	1	1	13	10	1	862	3	1	139	4	0	470	3,518
Canada	966	405	93	38	91	154	0	41	29	63	26	9	119	1	8	7	4	3	1	65	2,123
United States	662	390	48	148	27	155	0	82	14	8	98	38	18	0	22	26	11	4	16	159	1,926
Switzerland	642	402	9	33	13	211	0	19	19	74	20	60	16	0	0	10	1	76	3	111	1,719
Netherlands	382	517	9	35	31	342	0	28	31	75	17	13	18	0	32	30	13	5	47	77	1,702

Table 5. Top ten markets vs. main airlines to Sri Lanka, April 2022

Country	Percentage share of the airline																					
	Sri Lankan Airlines	Qatar Airways	Emirates	Singapore Airlines	IndiGo	Fly Dubai	Aeroflot	Etihad Airways	LOT Polish	Spice Jet	Air India	Turkish Airline	Oman Air	Air Arabia	Vistara	Malaysia Airlines	Gulf Air	Edelwiss Air	Air Astana	Guinee Airlines	Other	Total
United Kingdom	36.4	31.5	22.0	2.0	0.3	1.3	0.0	2.0	0.8	0.0	0.2	0.3	0.8	0.2	0.2	0.4	1.1	0.3	0.0	0.0	0.2	11,539
India	43.5	0.3	1.2	0.4	26.7	0.3	0.0	0.0	0.0	14.9	8.5	0.0	0.1	0.2	3.8	0.0	0.0	0.0	0.0	0.1	0.1	8,678
Germany	29.9	35.4	19.3	0.9	0.2	1.1	0.0	4.5	3.3	0.1	0.1	0.5	2.8	0.1	0.2	0.3	0.7	0.7	0.0	0.0	0.0	6,088
France	30.3	34.9	21.1	1.6	0.3	2.9	0.0	3.2	0.3	0.0	0.2	0.4	2.9	0.2	0.4	0.3	0.3	0.1	0.0	0.0	0.3	4,035
Russian Federation	5.8	3.9	9.2	0.1	0.2	8.9	61.5	1.9	0.2	0.0	0.1	0.2	0.2	6.7	0.1	0.1	0.4	0.0	0.3	0.1	0.3	3,874
Australia	48.8	1.5	4.1	40.0	0.2	0.6	0.0	0.5	0.0	0.0	0.0	0.0	0.1	0.1	0.2	3.8	0.0	0.0	0.0	0.0	0.1	3,508
Canada	27.1	45.6	16.2	1.2	1.3	0.3	0.0	4.5	1.4	0.3	0.9	0.1	0.1	0.1	0.4	0.1	0.2	0.2	0.0	0.0	0.0	2,083
United States	25.1	33.5	19.4	6.6	1.7	2.4	0.0	4.4	0.7	0.1	0.9	1.0	0.1	0.4	2.9	0.2	0.2	0.1	0.0	0.1	0.1	1,872
Switzerland	17.6	38.6	24.9	1.6	0.1	1.3	0.0	2.7	1.2	0.0	0.8	0.2	4.6	0.0	0.2	0.1	0.0	6.1	0.0	0.0	0.0	1,647
Netherlands	27.4	25.5	26.2	1.3	0.3	3.2	0.0	7.7	2.0	0.0	0.3	3.0	0.3	0.1	0.1	0.5	0.3	1.9	0.0	0.0	0.1	1,575



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