

# Monthly Tourist Arrivals Report:

**July 2023**

Sri Lanka Tourism Development Authority

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## Introduction

The following document provides a synthesis of the most recent July, 2023 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31<sup>st</sup> July 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 July 2023, Sri Lanka witnessed a remarkable surge in international tourist arrivals compared to the same period in 2022. The number of foreign tourist arrivals skyrocketed by 202.4% year-on-year, reaching a total of 143,039 visitors. This significant increase in tourist arrivals during July 2023 can be attributed to several factors, including the ongoing recovery of the tourism sector, pent-up demand, improved air connectivity, and the recent reopening of China as a key market. This positive trend is expected to persist throughout the year, according to the UNWTO.

When analyzing the data from January to July 2023, the cumulative figure of tourist arrivals reached 767,913, surpassing the numbers of the previous year, which

recorded 458,670 arrivals. This growth indicates a robust rebound in the tourism industry, as the numbers continue to exceed pre-pandemic levels.

The top five source markets for Sri Lanka's tourism in July 2023 were identified as India, the United Kingdom, China, Germany and Russia respectively. These countries played a crucial role in driving the surge in tourist arrivals, contributing to the overall recovery of Sri Lanka's tourism sector.

Furthermore, comparing June 2023 to July 2023, there was a significant increase of 42% in tourist arrivals. This growth further highlights the accelerated pace of recovery and the growing interest among international travelers to visit Sri Lanka..

**Table 1. Monthly tourist arrivals, July 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		
September	29,802		
October	42,026		
November	59,759		
December	91,961		
<b>TOTAL</b>	<b>719,978</b>	<b>767,913</b>	



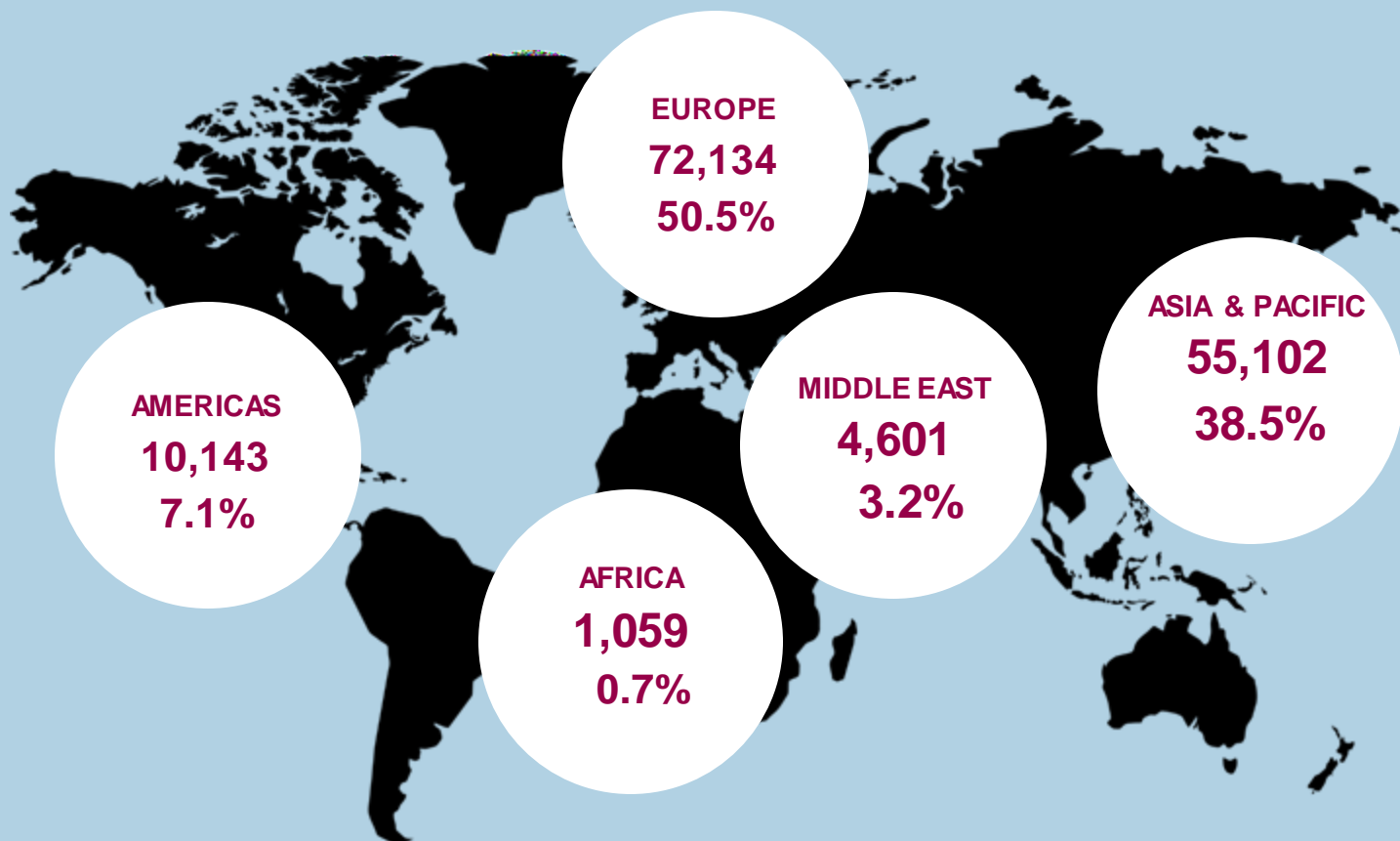
**Tourist Arrivals | July 2023**

# 143,039



## Tourist arrivals by region and percentage share July 2023

Map 1. Tourist arrivals by region and percentage share



Europe emerged as the dominant contributor to tourism in Sri Lanka, accounting for the majority of tourists with a share of 50.5% of total arrivals. Concurrently, the Asia Pacific region became the primary source market for tourist traffic to Sri Lanka, constituting 38.5% of the total influx.

This growth in tourism can be attributed to an increasing demand from countries such as India, China, and the Maldives, which has played a pivotal role in bolstering the country's tourism sector.

Breaking down the contributions further, the Americas have contributed 7.1% to the total tourists arrivals, while the Middle East has accounted for 3.2%. These regions have played their part in shaping Sri Lanka's tourism landscape.



# Top primary markets and top potential markets

## Top primary markets, July 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, July 2023



Note: The top primary 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

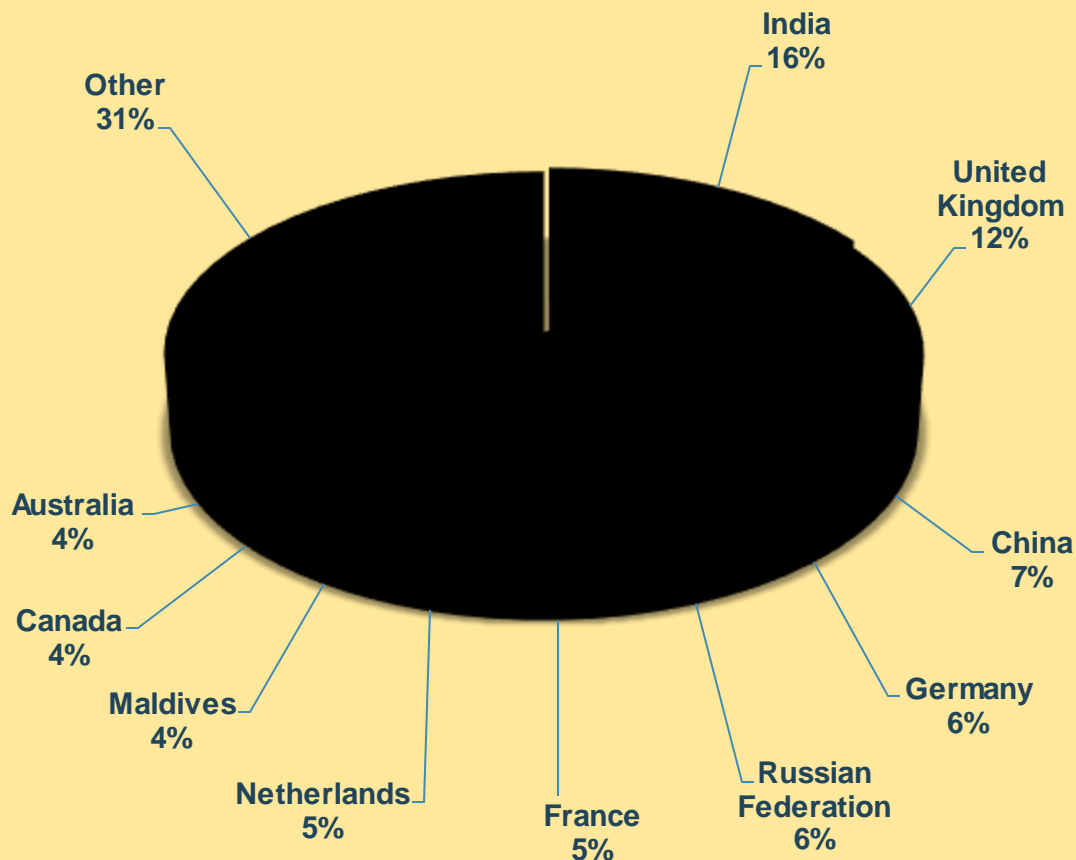
## July 2023

During July, the top source markets to Sri Lanka were India, United Kingdom, China, Germany and Russia. India accounted for the highest percentage of arrivals at 16%, while the United Kingdom, China, Germany and Russia represented 12%, 7%, 6% and 6% respectively. These trends indicate changes in outbound travel preferences and travel patterns, with growth in arrivals from India and United Kingdom and China signaling a shift towards emerging destinations.

The improved air accessibility, favorable conditions within the country, proximity, and geopolitical factors have contributed to making India and United Kingdom the primary source of tourism for Sri Lanka.

It's worth noting that the global and local conditions have influenced the growth rates of arrivals from different countries. While countries like Russia, China, India, Maldives, and Netherlands have shown substantial growth in arrivals, the United Kingdom and Canada have exhibited lowest growth rates compared to June 2022, possibly due to emerging trends and responses to global and local conditions.

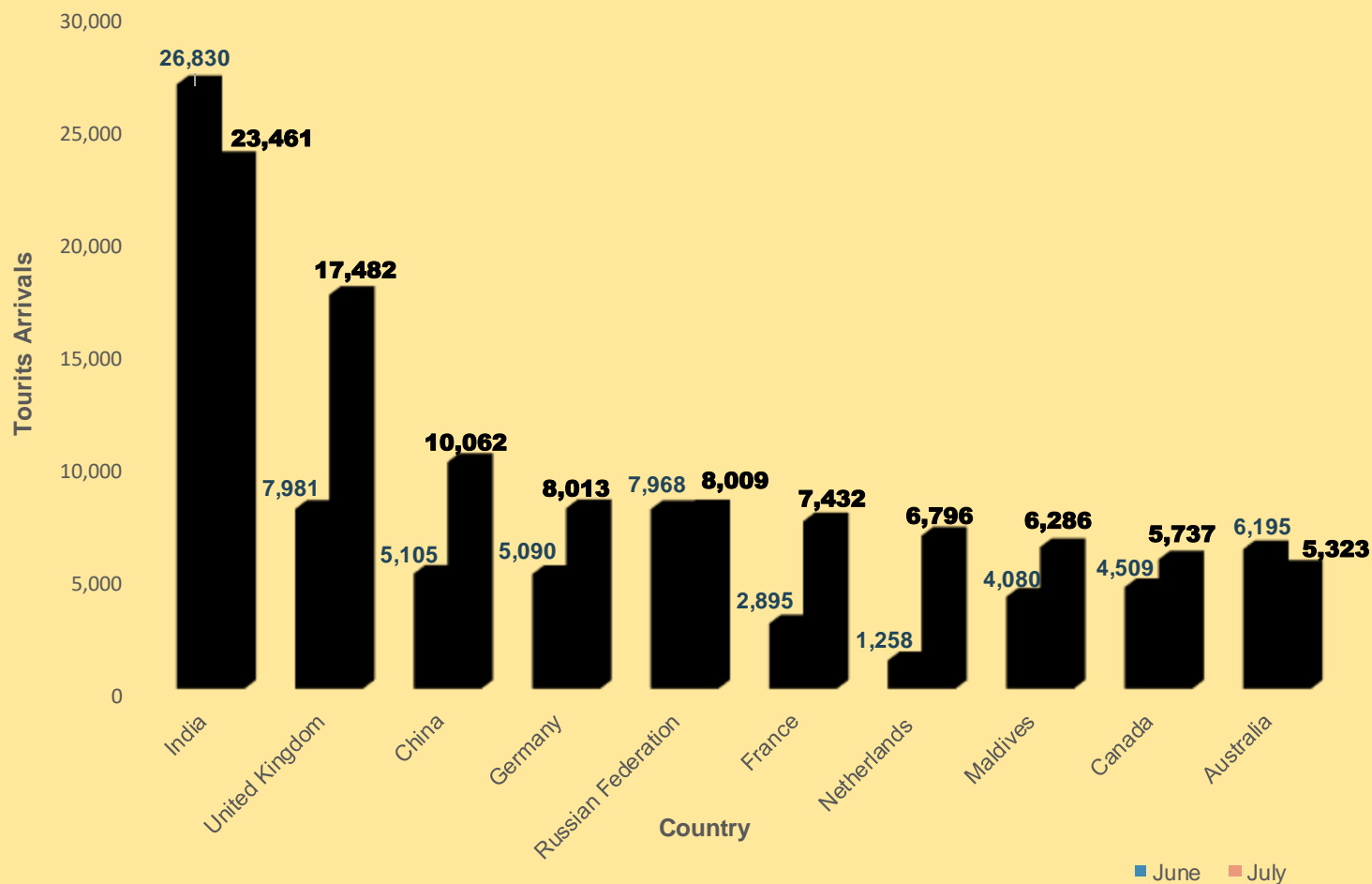
**Chart 1. Top ten source markets to Sri Lanka, July 2023**





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

Rank	Country of Residence	Tourist Arrivals (July 2023)			Tourist Arrivals ( July 2022)
		By Air	By Sea	Total	
1	India	23,461	0	23,461	6,031
2	United Kingdom	17,482	0	17,482	9,257
3	China	10,062	0	10,062	266
4	Germany	8,013	0	8,013	3,666
5	Russian Federation	8,009	0	8,009	1,918
6	France	7,432	0	7,432	3,567
7	Netherlands	6,796	0	6,796	2,053
8	Maldives	6,286	0	6,286	1,207
9	Canada	5,737	0	5,737	3,458
10	Australia	5,323	0	5,323	1,974

**Chart 2. Comparison of arrivals from top ten markets to Sri Lanka, June /July – 2023**



## Top ten source markets

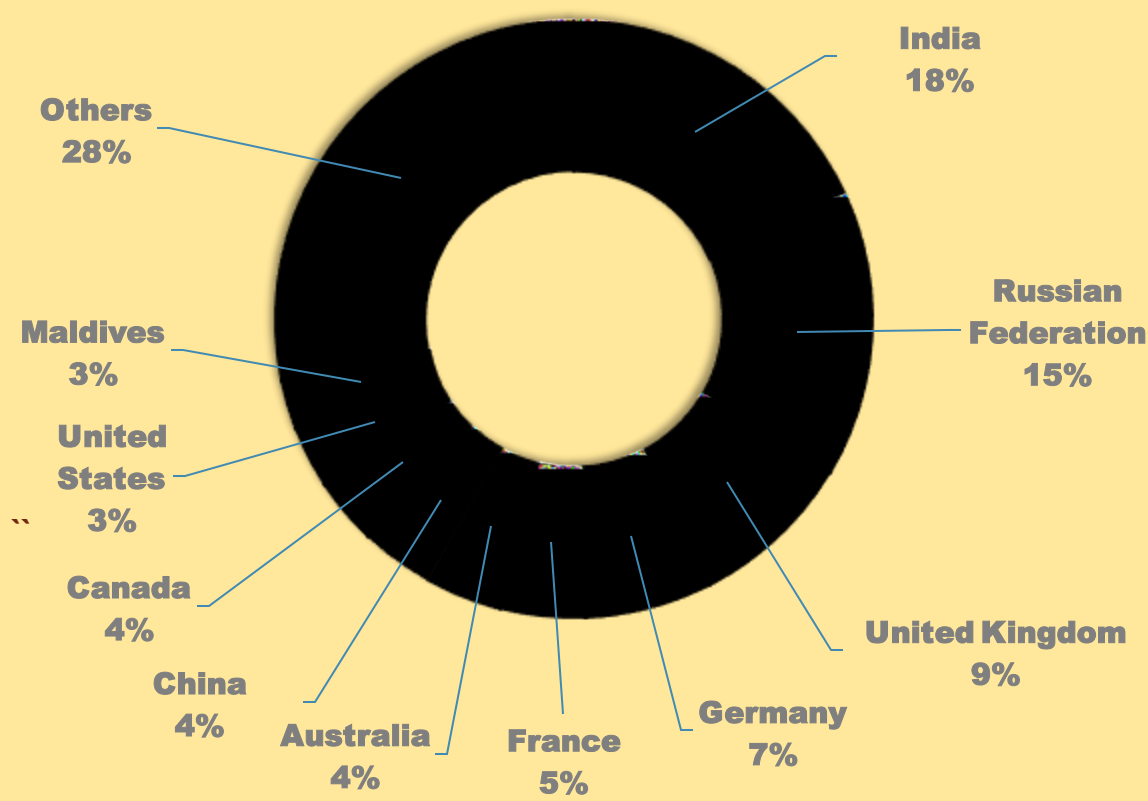
### January to July 2023

During the period from January to July 2023, Sri Lanka experienced changes in its international tourist arrivals compared to the same period in 2022. The main sources of international tourists for Sri Lanka during January to July 2023 were India, Russian Federation, United Kingdom, Germany and France. However, there were notable shifts in tourist arrivals from different countries. Specifically there was a increase in tourist arrivals from countries such as China, Russia, Maldives and United States compared to the same period in 2022. These countries contributed to the growth in overall tourist arrivals to Sri Lanka during the first seven months of 2023.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ July 2023)	Tourist Arrivals (Jan ~ July 2022)
1	India	139,654	74,792
2	Russian Federation	118,284	48,321
3	United Kingdom	68,304	58,879
4	Germany	53,210	37,108
5	France	35,020	25,451
6	Australia	32,221	16,514
7	China	29,924	1,850
8	Canada	28,163	16,475
9	United States	25,886	13,154
10	Maldives	20,195	9,596
11	Others	217,052	156,530
<b>Total</b>		<b>767,913</b>	<b>458,670</b>

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





# Tourist arrivals by purpose of visit

## July 2023

An analysis conducted on the purpose of visits by tourists to Sri Lanka reveals notable trends in their motivations. The majority of tourists, accounting for 52% of all visits, chose to explore the country for pleasure or vacation purposes. This significant percentage highlights Sri Lanka's appeal as a sought-after destination for leisure travelers in search of relaxation and enjoyable experiences. Additionally, 23% of tourists visited the country to reconnect with friends and relatives, showcasing the nation's ability to attract individuals with personal connections or a desire to foster relationships with loved ones residing in Sri Lanka.

In contrast, business-related reasons contributed to only 4% of tourist visits, indicating a relatively small segment of visitors arriving for professional engagements. Further insights indicate that a modest percentage of tourists, 5%, arrived in Sri Lanka for MICE (Meetings, Incentives, Conferences, and Exhibitions) purposes, reflecting the country's growing presence as a venue for such events. Additionally, a smaller fraction of 0.37% and 0.36% visited for health/Ayurvedic and educational purposes, respectively, illustrating niche interests that contribute to the diverse array of motivations bringing tourists to the country. 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 objectives

Among the top source markets such as India, China, Germany, France, Russia and Netherland, the primary reason for visiting Sri Lanka was for pleasure or vacation, accounting for the majority of visits. Specifically Indian tourists constituted 61.2%, Chinese tourists 86.3%, German tourists 55 %, French tourists 57.7%, Russian tourists 42.5% and Tourists from Netherland 80% visited for this purpose.

Canadian tourists (76.02%), Brithish tourists (55.7%) and Australian tourists (48.6 %) on the other hand, visited Sri Lanka primarily to see their friends and relatives, likely due to the presence of Sri Lankan diaspora in these countries. Only 16.3 % of Canadian tourists , 32.6% of British tourists and 37.2% of Australian tourists came for pleasure/vacation purposes.

Furthermore, a fraction of Indian tourists, 17.6%, and 7.2 % of Indian tourists visited Sri Lanka for business-related purposes and MICE purposes, respectively. 2.0 % of German tourists had visited Sri Lanka for health purposes.

Chart 4: Purpose of visit

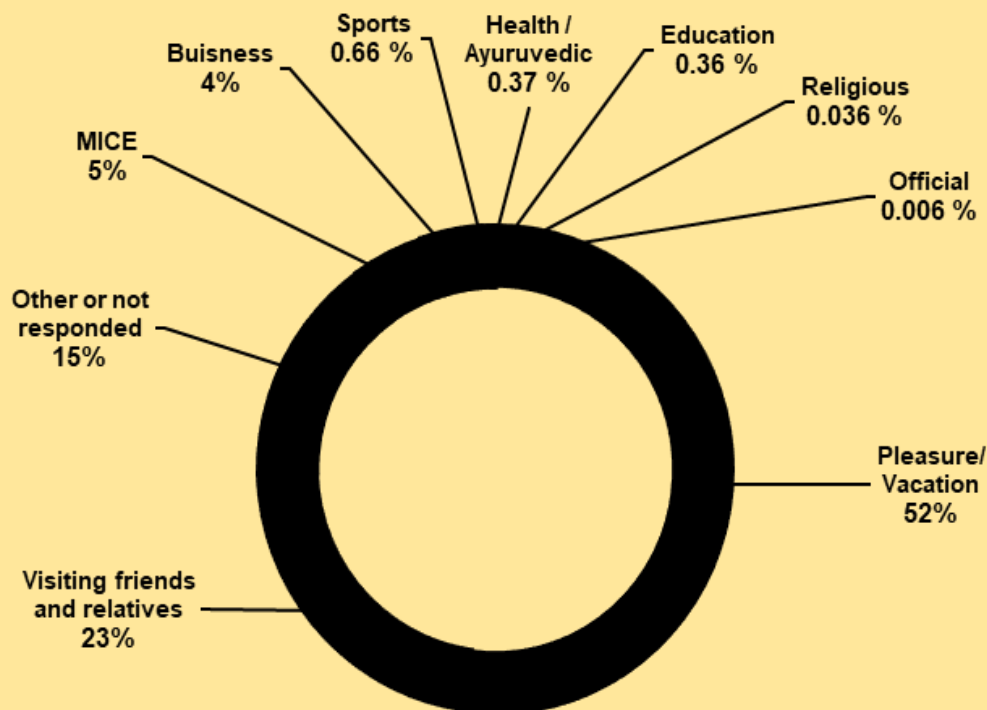
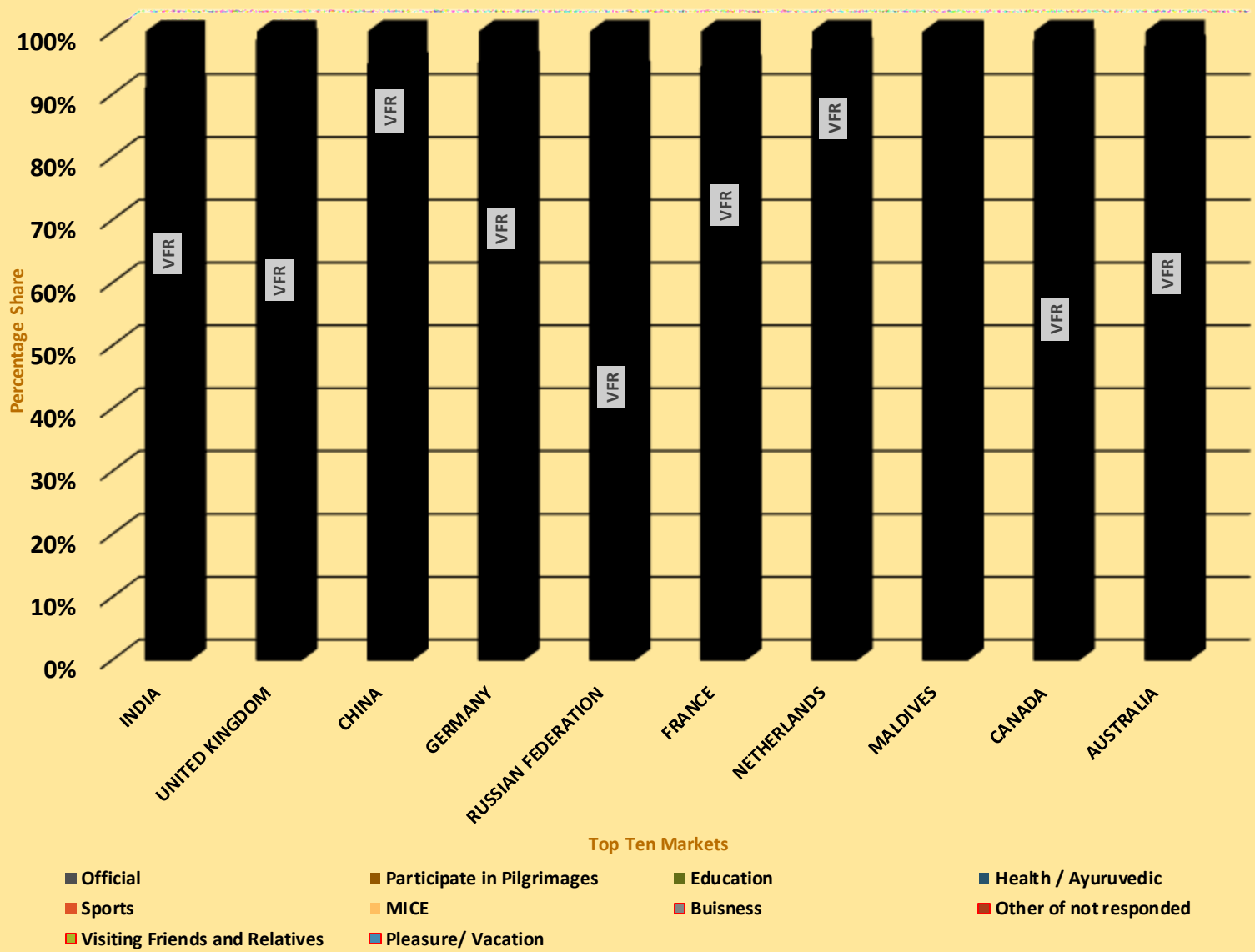




Chart 5 : Purpose of visit vs main source markets





## International tourist arrivals by country of residence

	July 2023			Tourist Arrivals July 2022	% Change July (23/22) 2023	Total Tourist Arrivals up to July 2023	Total Tourist Arrivals up to July 2022	% Change up to July ( 23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
AMERICAS	10,143	0	10,143	5,026	101.81	56,709	31,073	82.51
North America	9,901	0	9,901	4,945	100.22	54,394	29,809	75.05
Canada	5,737	0	5,737	3,458	65.91	28,163	16,475	70.94
Mexico	44	0	44	18	144.44	345	180	91.67
United States	4,120	0	4,120	1,469	180.46	25,886	13,154	96.79
Carribean & Central America	37	0	37	17	117.65	359	194	86.08
Costa Rica	03	0	03	0	-	31	29	6.90
Jamaica	03	0	03	0	-	25	9	177.78
Others	31	0	31	17	82.35	303	156	95.51
South America	205	0	205	64	220.31	1,956	1,070	82.80
Argentina	34	0	34	8	325.00	421	148	184.46
Brazil	69	0	69	34	102.94	731	422	73.22
Chile	27	0	27	7	285.71	245	113	116.81
Colombia	22	0	22	8	175.00	273	206	32.52
Others	53	0	53	7	657.14	286	181	58.01
AFRICA	1,059	0	1,059	227	376.21	4,585	2,963	55.48
North Africa	338	0	338	106	218.87	1,424	1,264	12.66
Morocco	81	0	81	19	326.32	415	286	45.10
Sudan	157	0	157	65	141.54	464	618	-24.92
Others	100	0	100	22	354.55	545	360	51.39
Sub-Saharan Africa	721	0	721	121	514.05	3,161	1,699	87.35
Kenya	44	0	44	5	780.00	269	129	108.53
Mauritius	21	0	21	7	200.00	163	58	181.03
Nigeria	09	0	09	1	800.00	46	17	170.59
South Africa	232	0	232	55	321.82	1,514	976	55.12
Others	415	0	415	53	724.53	1,169	519	129.48



	July 2023			Tourist Arrivals July 2022	% Change July (23/22)	Total Tourist Arrivals up to July 2023	Total Tourist Arrivals up to July 2022	% Change up to July ( 23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	55,102	0	55,102	11,079	397.36	278,616	121,491	129.33
North East Asia	12,566	0	12,566	542	-	44,042	4,045	988.80
China	10,062	0	10,062	266	-	29,924	1,850	-
Japan	1,454	0	1,454	169	760.36	8,425	1,164	623.80
South Korea	628	0	628	87	621.84	3,548	824	330.58
Taiwan	411	0	411	16	-	2,084	164	1170.73
Others	11	0	11	4	175.00	61	43	41.86
South East Asia	3,254	0	3,254	594	447.81	18,050	6,081	196.83
Cambodia	47	0	47	14	235.71	344	71	384.51
Indonesia	249	0	249	30	730.00	1,210	471	156.90
Malaysia	915	0	915	123	643.90	5,153	1,304	295.17
Myanmar	93	0	93	16	481.25	424	143	196.50
Philippines	448	0	448	149	200.67	2,306	1,174	96.42
Singapore	656	0	656	156	320.51	4,547	1,877	142.25
Thailand	633	0	633	84	653.57	2,705	736	267.53
Vietnam	195	0	195	22	786.36	1,265	285	343.86
Others	18	0	18	0	-	96	20	380.00
Oceania	6,082	0	6,082	2,223	173.59	36,381	17,938	102.82
Australia	5,323	0	5,323	1,974	169.66	32,221	16,514	95.11
New Zealand	734	0	734	239	207.11	4,037	1,391	190.22
Others	25	0	25	10	150.00	123	33	272.73
South Asia	33,200	0	33,200	7,720	330.05	180,143	93,427	92.82
Afghanistan	30	0	30	2	-	73	21	247.62
Bangladesh	1,520	0	1,520	176	763.64	6,557	1,721	281.00
Bhutan	41	0	41	3	-	201	56	258.93
India	23,461	0	23,461	6,031	289.01	139,654	74,792	86.72
Iran	264	0	264	35	654.29	6,237	3,241	92.44
Maldives	6,286	0	6,286	1,207	420.80	20,195	9,596	110.45
Nepal	375	0	375	25	-	2,170	571	280.04
Pakistan	1,223	0	1,223	241	407.47	5,056	3,429	47.45
EUROPE	72,134	0	72,134	29,684	142.93	411,379	290,678	41.52
Northern Europe	22,056	0	22,056	10,922	101.94	88,674	76,057	16.59
Denmark	1,721	0	1,721	457	276.59	6,562	5,751	14.10
Finland	106	0	106	59	79.66	1,072	1,118	(4.11)
Norway	1,643	0	1,643	757	117.04	5,668	4,441	27.63
Sweden	560	0	560	209	167.94	4,316	3,307	30.51
United Kingdom	17,482	0	17,482	9,257	88.85	68,304	58,879	16.01
Others	544	0	544	183	197.27	2,752	2,561	7.46

	July 2023			Tourist Arrivals July 2022	% Change July (23/22)	Total Tourist Arrivals up to July 2023	Total Tourist Arrivals up to July 2022	% Change up to July (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
Western Europe	29,879	0	29,879	12,924	131.19	129,074	88,293	46.19
Austria	979	0	979	299	227.42	5,129	3,901	31.48
Belgium	2,259	0	2,259	1,115	102.60	5,846	4,308	35.70
France	7,432	0	7,432	3,567	108.35	35,020	25,451	37.60
Germany	8,013	0	8,013	3,666	118.58	53,210	37,108	43.39
Netherlands	6,796	0	6,796	2,053	231.03	15,291	8,329	83.59
Switzerland	4,329	0	4,329	2,207	96.15	14,203	9,013	57.58
Others	71	0	71	17	317.65	375	183	104.92
Central/ Eastern Europe	11,853	0	11,829	2,966	298.82	156,006	105,391	48.00
Belarus	453	0	453	35	-	5,796	2,340	147.69
Czech Republic	789	0	789	217	263.59	5,598	6,168	(9.24)
Estonia	15	0	15	8	87.50	701	769	(8.84)
Hungary	200	0	200	42	376.19	1,767	1,774	(0.39)
Kazakhstan	106	0	106	12	783.33	2,206	7,644	(71.14)
Lithuania	113	0	113	52	117.31	1,406	1,653	(14.99)
Poland	999	0	999	344	190.41	7,340	13,073	(43.85)
Romania	172	0	172	64	168.75	1,852	2,456	(24.59)
Russia	8,009	0	8,009	1,918	317.57	118,284	48,321	144.79
Slovakia	254	0	254	112	126.79	2,506	1,852	35.31
Ukraine	185	0	185	58	218.97	2,840	13,840	(79.48)
Others	558	0	558	104	413.46	5,710	5,501	3.36
Southern/ Mediterranean Europe	8,346	0	8,346	2,872	190.60	37,625	20,937	79.71
Greece	101	0	101	40	152.50	792	556	42.45
Italy	2,370	0	2,370	650	264.62	9,857	3,855	155.69
Portugal	282	0	282	86	227.91	1,901	1,277	48.86
Spain	2,751	0	2,751	1,499	83.52	9,208	7,118	29.36
Turkey	251	0	251	57	340.35	1,791	986	81.64
Israel	1,919	0	1,919	404	375.00	10,891	5,295	105.68
Others	672	0	672	136	394.12	3,185	1,850	72.16
MIDDLE EAST	4,601	0	4,601	1,277	260.30	16,624	12,465	33.37
Bahrain	204	0	204	36	466.67	764	339	125.37
Egypt	292	0	292	136	114.71	1,578	1,716	(8.04)
Iraq	100	0	100	98	2.04	546	808	(32.43)
Jordan	545	0	545	242	125.21	2,299	1,480	55.34
Kuwait	259	0	259	78	232.05	1,214	661	83.66
Lebanon	321	0	321	108	197.22	1,882	1,047	79.75
Oman	427	0	427	75	469.33	1,271	496	156.25
Qatar	179	0	179	38	371.05	558	181	208.29
Saudi Arabia	1,564	0	1,564	311	402.89	4,303	4,607	(6.60)
United Arab Emirates	576	0	576	112	414.29	1,658	780	112.56
Others	134	0	134	43	211.63	551	350	57.43
TOTAL	143,039	0	143,039	47,293	202.45	767,913	458,670	67.42

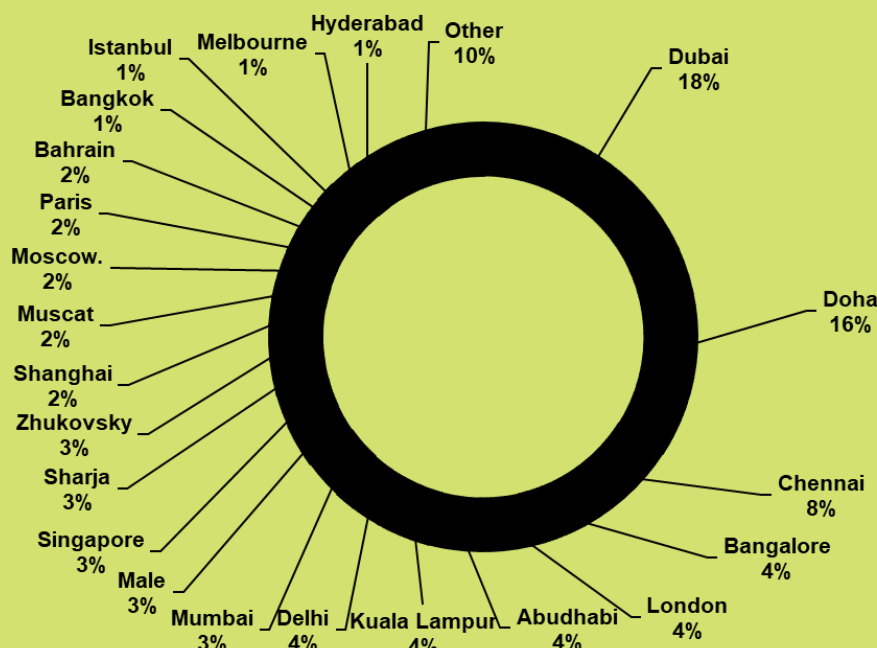


## Main last departure airports and airlines to Sri Lanka, July 2023

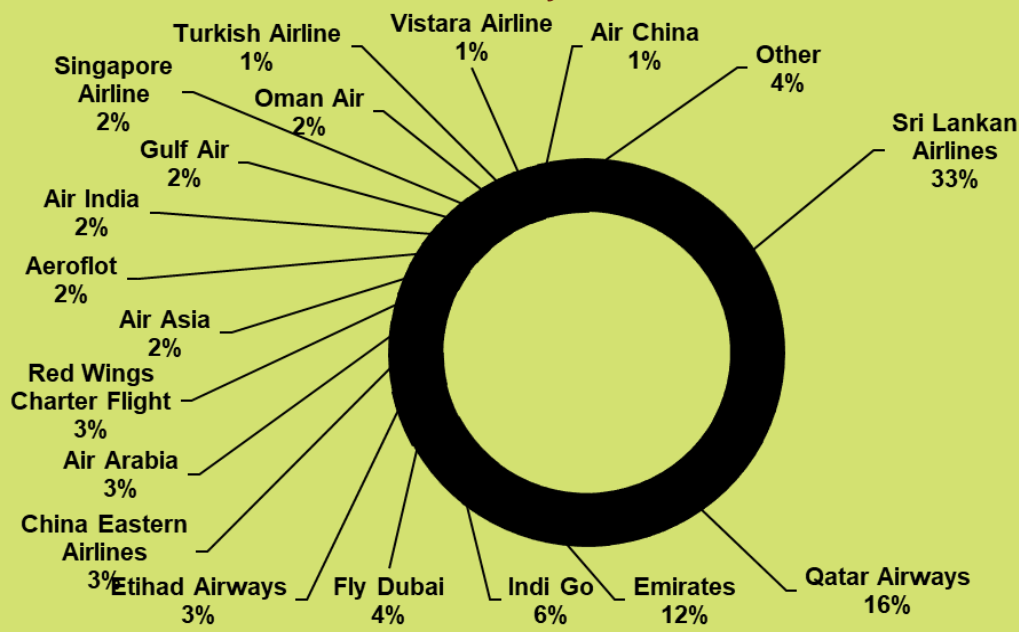
The importance of air travel for Sri Lanka's tourism industry is clearly evident when analyzing departure airports and preferred airlines. According to the data presented in Chart 6, approximately 42% of tourists departed from airports located in Dubai, Doha, and Chennai. Additionally, the most popular airlines chosen by tourists arriving in Sri Lanka were Sri Lankan Airlines, Qatar Airways, and Emirates, collectively serving 61% of the total tourist arrivals.

These figures undeniably highlight the significant role that air travel plays in facilitating and boosting tourism to Sri Lanka. The analysis demonstrates how air connectivity from major hubs like Dubai, Doha, and Chennai has contributed to attracting a substantial portion of tourists to the country. Furthermore, the preference for airlines such as Sri Lankan Airlines, Qatar Airways, and Emirates showcases the influence of efficient and well-connected air routes in driving tourism to Sri Lanka.

**Chart 6. Main last departure airports to Sri Lanka, July 2023**



**Chart 7. Main airlines to Sri Lanka, July 2023**





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

### July 2023

The data reveals that tourists coming to Sri Lanka exhibit variations in their preferred airlines and last departure airports, depending on their primary markets. For instance, Indian tourists commonly choose Sri Lankan Airlines and IndiGo, whereas Russian tourists tend to favour Red Wings and Aeroflot. In comparison, Sri Lankan Airlines is a popular choice among tourists from countries like India, Maldives, Canada, Australia and China. It is worth noting that German tourists and tourists from Netherland frequently choose Qatar Airways and utilize Doha as their primary last departure airport. This highlights the crucial role of destination accessibility in promoting tourism.

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

Country	Dubai	Doha	Chennai	Bangalore	London	Abu Dhabi	Kuala Lumpur	Delhi	Mumbai	Male	Singapore	Sharja	Zhukovsky	Shanghai	Muscat	Moscow	Paris	Bahrain	Bangkok	Istanbul	Other	Total
India	841	139	8,909	4,868	15	42	109	3,010	1,772	100	101	122	0	1	49	1	6	32	57	5	3,282	23,461
United Kingdom	4,952	5,721	470	116	2,928	523	332	262	214	229	215	106	0	6	153	0	19	639	89	209	299	17,482
China	198	29	4	2	5	28	896	7	3	498	144	3	0	3,027	5	1	0	18	325	4	4,865	10,062
Germany	1,715	2,700	217	135	102	222	174	340	316	116	24	58	0	3	462	8	893	104	43	246	135	8,013
Russian Federation	438	216	22	28	4	68	144	37	7	45	6	847	3,374	29	72	2,490	2	54	42	12	72	8,009
France	2,280	2,030	198	46	249	292	156	133	419	76	39	33	0	0	130	0	911	119	30	146	145	7,432
Netherlands	2,042	2,170	37	34	477	226	88	149	452	63	25	24	0	1	315	0	208	45	30	321	89	6,796
Maldives	870	11	22	114	1	1,711	235	2	6	1,735	53	6	0	2	0	1	0	700	122	1	694	6,286
Canada	1,743	891	500	192	644	55	144	303	783	61	176	18	0	7	7	0	63	11	20	7	112	5,737
Australia	163	67	106	38	177	31	673	56	17	84	1,165	37	0	1	10	0	57	5	42	5	2,589	5,323

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

Country	Sri Lankan Airlines	Qatar Airways	Emirates	Indi Go	China Eastern Airlines	Red Wings	Etihad Airways	Fly Dubai	Aeroflot	Air India	Gulf Air	Air Asia	Air China	Vistara Airline	Air Arabia	Singapore Airline	Oman Air	Turkish Airline	Others	Total
India	50.07	0.40	1.52	34.15	0.00	0.00	0.12	0.69	0.00	6.48	0.14	0.20	0.00	3.67	0.52	0.08	0.16	0.02	1.78	100.00
United Kingdom	25.37	32.54	24.85	0.84	0.05	0.00	2.55	2.69	0.00	0.81	3.66	1.09	0.00	0.37	0.59	0.53	0.71	1.20	2.14	100.00
China	33.78	0.19	1.15	0.02	36.39	0.00	0.28	0.40	0.01	0.03	0.18	7.31	14.44	0.02	0.03	0.69	0.03	0.04	5.01	100.00
Germany	27.48	33.25	16.16	0.71	0.07	0.00	2.25	4.58	0.10	1.04	1.30	1.26	0.04	0.50	0.71	0.14	5.65	3.07	1.70	100.00
Russian Federation	2.77	2.58	1.72	0.39	0.39	42.13	0.65	3.25	31.09	0.16	0.67	1.17	0.04	0.04	10.58	0.04	0.66	0.15	1.52	100.00
France	25.93	26.25	23.88	0.89	0.01	0.00	3.47	6.05	0.00	0.98	1.60	1.14	0.01	3.31	0.44	0.22	1.61	1.96	2.22	100.00
Netherlands	20.67	31.92	24.84	0.32	0.00	0.00	3.05	4.71	0.00	0.38	0.66	0.79	0.00	1.53	0.35	0.21	4.53	4.72	1.31	100.00
Maldives	45.39	0.17	6.14	0.14	0.03	0.00	27.22	7.70	0.02	0.03	11.14	1.30	0.02	0.00	0.10	0.14	0.00	0.02	0.45	100.00
Canada	47.88	15.34	24.19	2.16	0.17	0.00	0.71	0.92	0.00	1.15	0.19	1.03	0.00	1.87	0.31	0.80	0.12	0.12	3.02	100.00
Australia	65.41	1.13	1.84	1.03	0.04	0.00	0.26	0.58	0.00	0.68	0.09	4.53	0.02	0.09	0.68	15.82	0.09	0.09	7.61	100.00



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