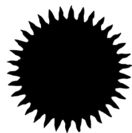


The Monthly Tourist Arrival Report:

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

August 2021

Sri Lanka Tourism Development Authority



Introduction

The following document provides a synthesis of the most recent August, 2021 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 6 September 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 of the 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.

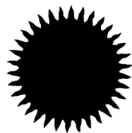


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Summary

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 tourist arrivals to Sri Lanka. The statistics in this report are derived from immigration data.

The total number of international tourist arrivals to Sri Lanka during August 2021 was 5,040. A considerable growth (albeit low volume) in arrivals in the month of August can be observed following the sharp contraction in arrivals after the month

of April. This could reflect the improvement in international arrivals owing to factors such as increase in vaccination programmes around the world, softer restrictions for vaccinated travellers, and growing consumer confidence. As of 31st August 2021, 24,377 tourists had visited Sri Lanka for this year, a decline of 95.2% 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 August 2021 were Canada, Germany, and the United Kingdom, followed by Pakistan, and India.

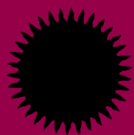
Table 1. Monthly tourist arrivals, August 2020 & 2021 and percentage change

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	-	-
October	0	-	-
November	0	-	-
December	393	-	-
Total (Jan – August)	507,311	24,377	(95.2)
TOTAL	507,704	-	-



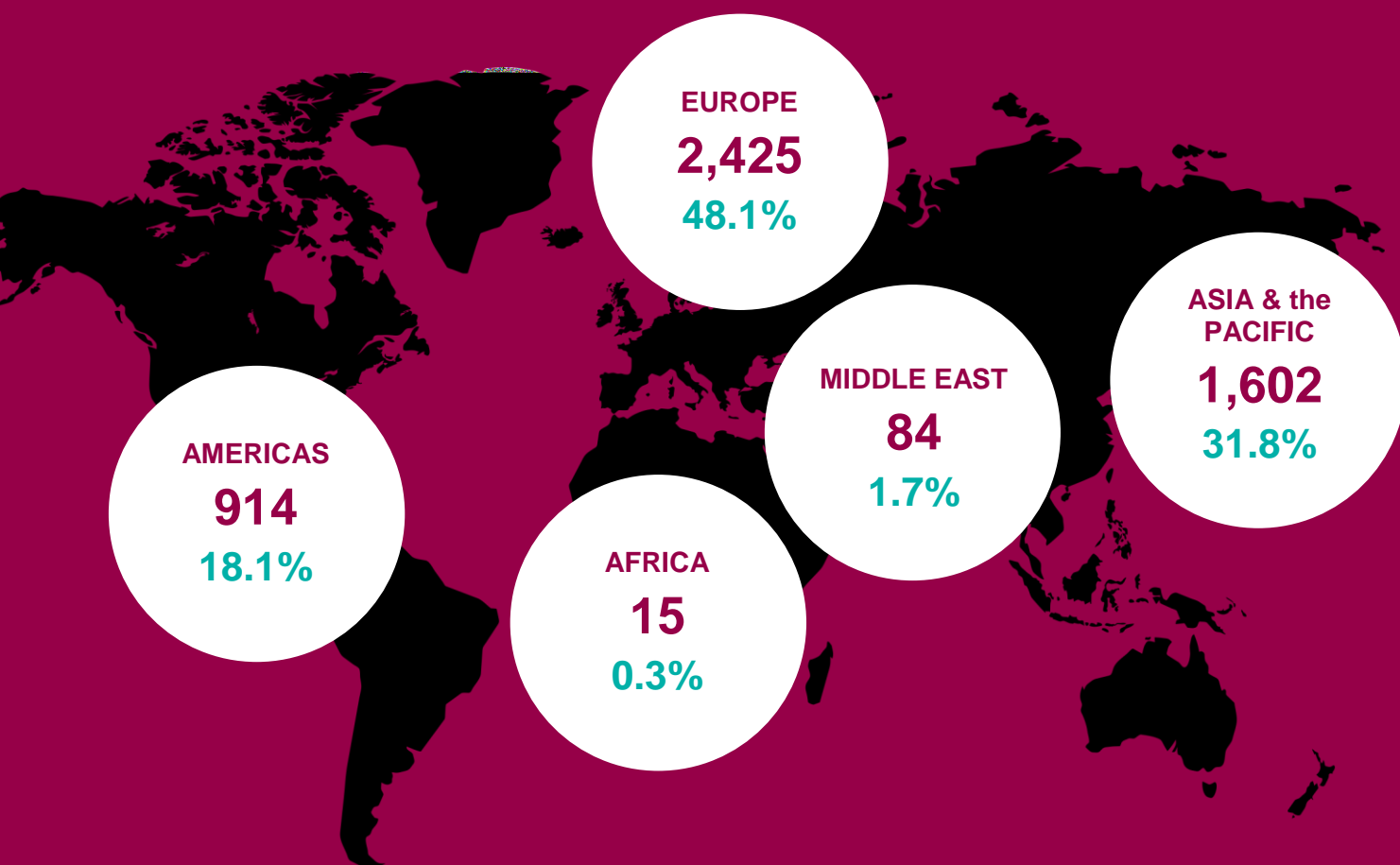
Tourist Arrivals | August 2021

5,040



Tourist arrivals by region and percentage share August 2021

Map 1. Tourist arrivals by region and percentage share



Europe became the largest source of tourist traffic to Sri Lanka with 48.1% of the total traffic received in August 2021. Asia and the Pacific accounted for 31.8% of the total traffic while the Americas accounted for 18.1%. In comparison to August last year, all regions have recorded a decline in arrivals. Despite the minor improvements

observed with the reopening of borders, the recovery of international tourism remains fragile and uncertain due to rising concerns over the Delta variant of COVID-19 and other variants that are gradually developing especially in Asia and the Pacific region (source: UNWTO Barometer, July 2021).





Top primary markets and top potential markets August 2021

Top primary markets

Canada

Spain

Germany

Norway

United Kingdom

Austria

India

Italy

United States

Sweden

France

Saudi Arabia

Russia

Australia

China

Japan

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).



Potential primary markets

Israel

South Africa

Poland

Finland

Czech Republic

Malaysia

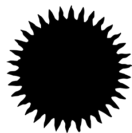
Singapore

Taiwan

Portugal

Thailand

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

Health and safety factors will have a major influence over travel consumer destination choice and vacation planning going forward. As leisure travel resumes and at least for the short term (i.e., Q3 2021 to Q2 2022), price will be more important than ever, however the Chinese are an exception to this trend (see chart 2 below).

- The Chinese market represents an opportunity to recover some lost revenue for the tourism sector.
- A significant minority of travel consumers in all markets indicate they would be willing to pay more, suggesting that there is potential to develop viable sustainable tourism options.
- A combination of safety and price – offering safe and secure experiences at a competitive rate in a strained market, at least in the short-term, is likely to drive tourism traffic more than sustainability.
- Though there is an increasing degree of crossover between “responsible” and COVID-19-safe travel.

Chart 1: Travel consumers are broadly willing to pay more for higher quality experiences following the COVID-19 pandemic (May 2021)



Question: Which of these statements comes closest to your view about your travel priorities once the COVID-19 pandemic is over?

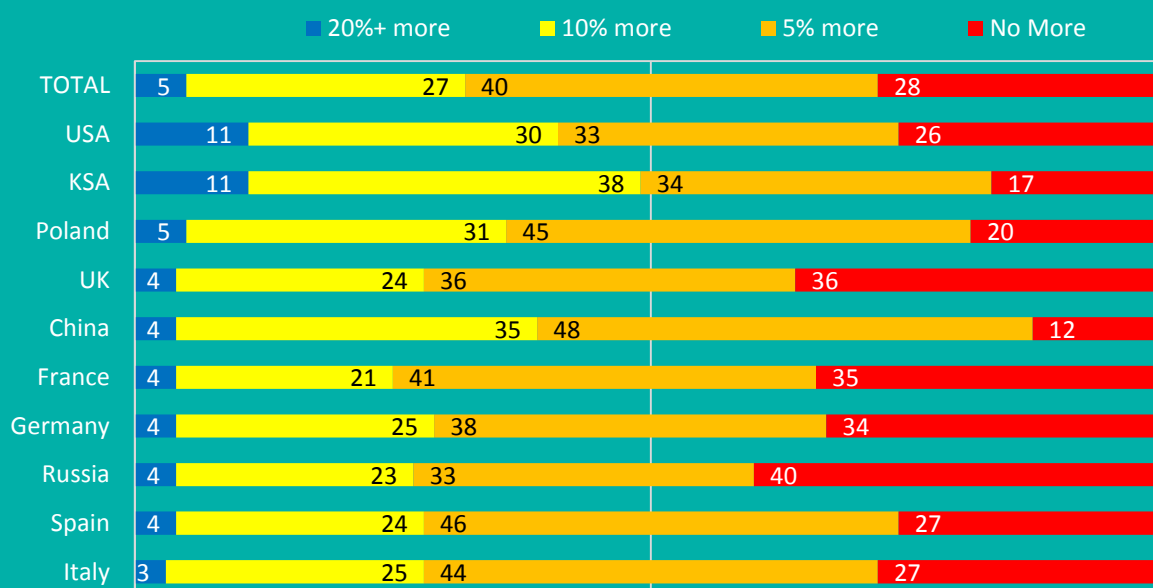


Methodology Note: Charts 1 and 2 are based on an opinion survey of a representative sample of n=1,000 identified travel consumers in each of 10 outbound travel markets. Fieldwork was carried out online in May 2021, using market research panels. A representative sample of the online population in each 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.

Chart 2: Travel consumers are less willing to pay extra for vacation experiences certified by a third party as socially and environmentally responsible (May2021)



Question: How much extra would you be willing to pay for vacation experiences that had been certified by an independent third-party organization as being environmentally and socially responsible?

- According to recent research conducted by an American-based marketing company, concerns around COVID-19 are set to continue to dominate, though the slowdown of the pandemic is also having an increasing influence. However, the availability of travel deals is showing increasing impact.
- These results indicate that travel consumers are starting to think beyond the pandemic and consider what kinds of packages may be available to them. Destinations that are able to offer highly competitive packages in compliance with the growing consensus around safety and security will benefit in “the new normal”.



Chart 3: Great travel deals are having an increasing impact on traveller behaviour as the market recovers (USA, 2020)



Question: Using a scale of 1 (no impact) to 5 (extreme impact), how will each of the following impact your decision to take a trip primarily for leisure purposes during the next 6 months?



Top ten source markets August 2021

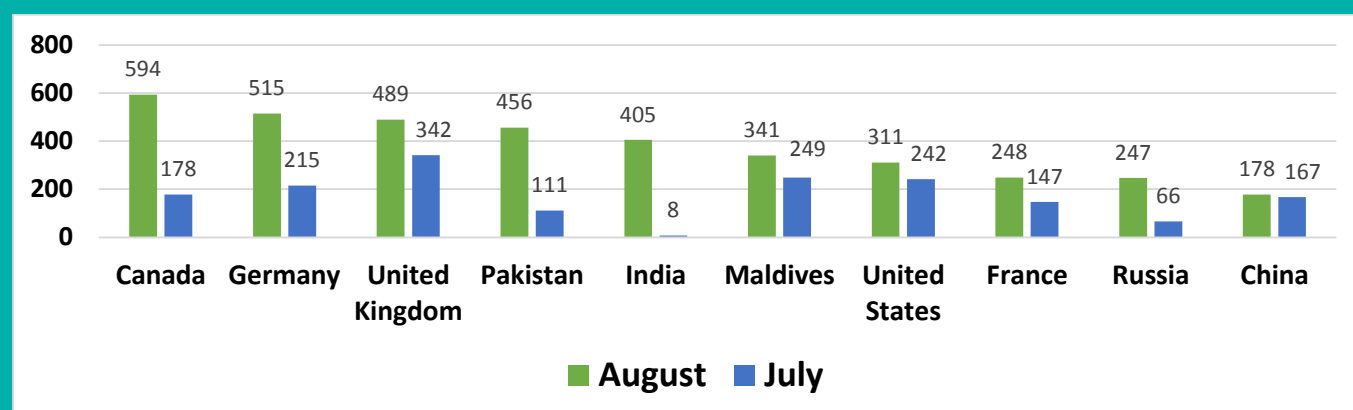
Canada, Germany, the United Kingdom, Pakistan and India were Sri Lanka's top five international tourist generating markets in the month of August, 2021. Canada was the largest source of tourist traffic to Sri Lanka with 12% of the total traffic received in the above period. Germany accounted for 10% of the total traffic. The growth in arrivals from countries in the Americas, and Western, Central & Eastern Europe, suggests a slight revitalization of leisure tourism, potentially driven by factors such as the gradual improvement of traveller confidence, the lifting of travel restrictions,

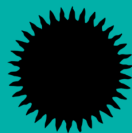
the roll out of COVID-19 vaccine programs and the North American and Western Europe summer holiday period. Further, the desire to visit friends and relatives (VFR) could have highly motivated travel consumers, especially from Canada and the United Kingdom to visit Sri Lanka during this period. The presence of Pakistan and India in the top source markets is noteworthy despite the surge in the Delta variant in the region and the travel restrictions for Indians (which were partially relaxed at the end of August).

Table 2. Top ten source markets to Sri Lanka, August 2021

Rank	Country of Residence	Tourist Arrivals (August 2021)			Tourist Arrivals (August 2020)
		By Air	By Sea	Total	
1	Canada	594	-	594	-
2	Germany	515	-	515	-
3	United Kingdom	489	-	489	-
4	Pakistan	456	-	456	-
5	India	405	-	405	-
6	Maldives	341	-	341	-
7	United States	311	-	311	-
8	France	248	-	248	-
9	Russia	247	-	247	-
10	China	178	-	178	-

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





Top ten source markets January – August 2021

Kazakhstan, Ukraine, China, India and the United States were Sri Lanka's top five international tourist-generating markets from January to August this year. All the countries in the top ten markets from January to August, 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 August from Kazakhstan had recorded growth in comparison to total arrivals up to August 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 - August 2021

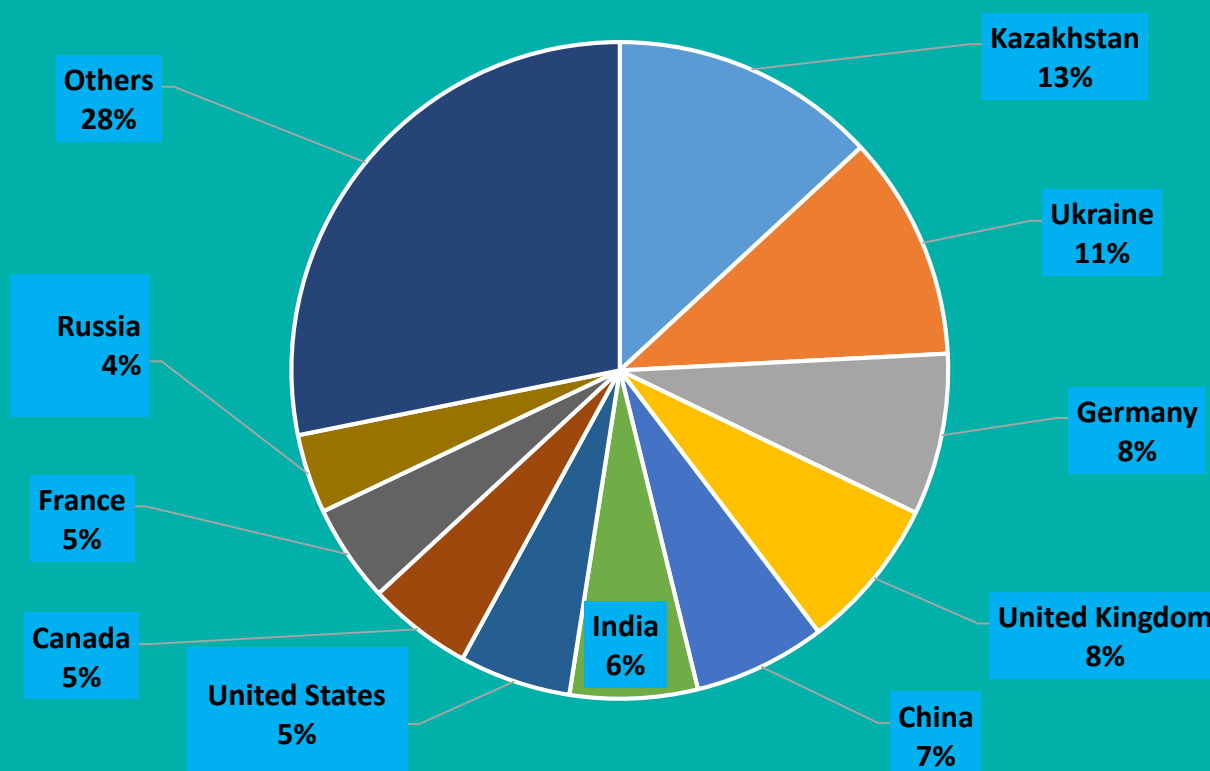




Chart 6. Top ten source markets, percentage changes, January– August 2021 & January– August 2020

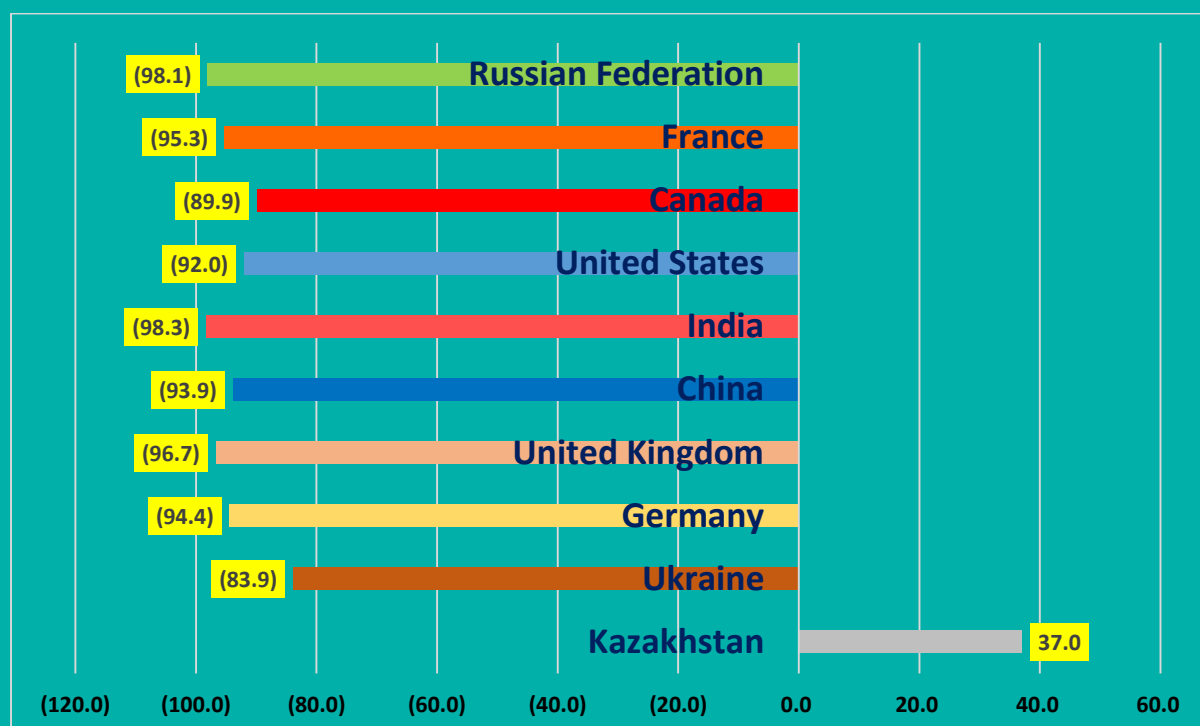


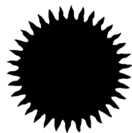
Table 3. Top ten markets to Sri Lanka – January to August 2020 & 2021 and percentage change

Rank	Country of Residence	Tourist Arrivals (Jan-Aug 2021)	Tourist Arrivals (Jan-Aug 2020)	%Change (Jan- Aug 2021 & Jan- Aug 2020)
1	Kazakhstan	3,197	2,333	37.0
2	Ukraine	2,699	16,776	(83.9)
3	Germany	1,938	34,507	(94.4)
4	United Kingdom	1,833	55,455	(96.7)
5	China	1,600	26,147	(93.9)
6	India	1,532	89,357	(98.3)
7	United States	1,339	16,842	(92.0)
8	Canada	1,260	12,436	(89.9)
9	France	1,175	24,838	(95.3)
10	Russian Federation	949	49,397	(98.1)

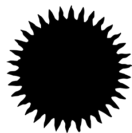


International tourist arrivals by country of residence

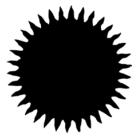
	August 2021			Total Tourist Arrivals August 2020	% Change August (20/21)	Total Tourist Arrivals up to August 2021	Total Tourist Arrivals up to August 2020	% Change up to August (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
AMERICAS	914	0	914	0	-	2,670	31,843	(91.6)
North America	908	0	908	0	-	2,609	29,627	(91.2)
Canada	594	0	594	0	-	1,260	12,436	(89.9)
Mexico	3	0	3	0	-	10	349	(97.1)
United States	311	0	311	0	-	1,339	16,842	(92.0)
Caribbean& Central America	1	0	1	0	-	16	226	(92.9)
Costa Rica	0	0	0	0	-	0	33	(100.0)
Jamaica	0	0	0	0	-	1	25	(96.0)
Others	1	0	1	0	-	15	168	(91.1)
South America	5	0	5	0	-	45	1,990	(97.7)
Argentina	0	0	1	0	-	8	416	(98.1)
Brazil	4	0	4	0	-	19	875	(97.8)
Chile	0	0	0	0	-	1	271	(99.6)
Colombia	1	0	1	0	-	14	201	(93.0)
Others	0	0	0	0	-	4	227	(98.2)
AFRICA	15	0	15	0	-	135	2,880	(95.3)
North Africa	4	0	4	0	-	19	689	(97.2)
Morocco	1	0	1	0	-	6	311	(98.1)
Sudan	3	0	3	0	-	7	143	(95.1)
Others	0	0	0	0	-	6	235	(97.4)
Sub-Saharan Africa	11	0	11	0	-	116	2,191	(94.7)
Kenya	1	0	1	0	-	3	110	(97.3)
Mauritius	2	0	2	0	-	6	170	(96.5)
Nigeria	0	0	0	0	-	2	25	(92.0)
South Africa	4	0	4	0	-	73	1,364	(94.6)
Others	4	0	4	0	-	32	522	(93.9)



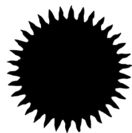
	August 2021			Total Tourist Arrivals August 2020	% Change August (20/21)	Total Tourist Arrivals up to August 2021	Total Tourist Arrivals up to August 2020	% Change up to August (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	1,602	0	1,602	0	-	5,506	181,154	(97.0)
North East Asia	192	0	192	0	-	1,708	37,320	(95.4)
China	178	0	178	0	-	1,600	26,147	(93.9)
Japan	9	0	9	0	-	76	6,644	(98.9)
South Korea	3	0	3	0	-	20	2,499	(99.2)
Taiwan	2	0	2	0	-	12	1,985	(99.4)
Others	0	0	0	0	-	0	45	(100.0)
South East Asia	140	0	140	0	-	385	14,927	(97.4)
Cambodia	0	0	0	0	-	1	372	(99.7)
Indonesia	96	0	96	0	-	144	1,114	(87.1)
Malaysia	2	0	2	0	-	21	3,494	(99.4)
Myanmar	3	0	3	0	-	18	532	(96.6)
Philippines	21	0	21	0	-	128	4,249	(97.0)
Singapore	12	0	12	0	-	37	2,545	(98.5)
Thailand	5	0	5	0	-	22	1,880	(98.8)
Vietnam	1	0	1	0	-	14	709	(98.0)
Others	0	0	0	0	-	0	32	(100.0)
Oceania	37	0	37	0	-	260	22,706	(98.9)
Australia	26	0	26	0	-	204	20,283	(99.0)
New Zealand	11	0	11	0	-	51	2,324	(97.8)
Others	0	0	0	0	-	5	99	(94.9)
South Asia	1,233	0	1,233	0	-	3,153	106,201	(97.0)
Afghanistan	1	0	1	0	-	5	146	(96.6)
Bangladesh	19	0	19	0	-	72	1,986	(96.4)
Bhutan	0	0	0	0	-	2	208	(99.0)
India	405	0	405	0	-	1,532	89,357	(98.3)
Iran	7	0	7	0	-	87	648	(86.6)
Maldives	341	0	341	0	-	803	9,407	(91.5)
Nepal	4	0	4	0	-	15	1,384	(98.9)
Pakistan	456	0	456	0	-	637	3,065	(79.2)



	August 2021			Total Tourist Arrivals August 2020	% Change August (20/21)	Total Tourist Arrivals up to August 2021	Total Tourist Arrivals up to August 2020	% Change up to August (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
EUROPE	2,425	0	2,425	0	-	15,637	281,203	(94.4)
Northern Europe	634	0	634	0	-	2,377	75,146	(96.8)
Denmark	27	0	27	0	-	109	4,905	(97.8)
Finland	4	0	4	0	-	29	2,298	(98.7)
Norway	64	0	64	0	-	189	3,019	(93.7)
Sweden	40	0	40	0	-	140	7,061	(98.0)
United Kingdom	489	0	489	0	-	1,833	55,455	(96.7)
Others	10	0	10	0	-	77	2,408	(96.8)
Western Europe	1,141	0	1,141	0	-	4,763	82,229	(94.2)
Austria	55	0	55	0	-	205	4,300	(95.2)
Belgium	54	0	54	0	-	76	3,371	(97.7)
France	248	0	248	0	-	1,175	24,838	(95.3)
Germany	515	0	515	0	-	1,938	34,507	(94.4)
Netherlands	115	0	115	0	-	301	8,656	(96.5)
Switzerland	152	0	152	0	-	531	6,389	(91.7)
Others	2	0	2	0	-	22	168	(86.9)
Central/ Eastern Europe	403	0	403	0	-	7,728	100,373	(92.3)
Belarus	7	0	7	0	-	88	2,638	(96.7)
Czech Republic	30	0	30	0	-	177	7,599	(97.7)
Estonia	1	0	1	0	-	35	1,185	(97.0)
Hungary	3	0	3	0	-	24	1,588	(98.5)
Kazakhstan	7	0	7	0	-	3,197	2,333	(37.0)
Lithuania	2	0	2	0	-	27	1,054	(97.4)
Poland	34	0	34	0	-	135	11,908	(98.9)
Romania	20	0	20	0	-	66	1,724	(96.2)
Russian Federation	247	0	247	0	-	949	49,397	(98.1)
Slovakia	18	0	18	0	-	122	1,513	(91.9)
Ukraine	20	0	20	0	-	2,699	16,776	(83.9)
Others	14	0	14	0	-	209	2,658	(92.1)



	August 2021			Total Tourist Arrivals August 2020	% Change August (20/21)	Total Tourist Arrivals up to August 2021	Total Tourist Arrivals up to August 2020	% Change up to August (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
Southern/ Mediterranean Europe	247	0	247	0	-	769	23,455	(96.7)
Greece	3	0	3	0	-	16	1,573	(99.0)
Italy	54	0	54	0	-	233	8,603	(97.3)
Portugal	6	0	6	0	-	27	1,602	(98.3)
Spain	78	0	78	0	-	207	3,385	(93.9)
Turkey	8	0	8	0	-	56	2,121	(97.4)
Israel	78	0	78	0	-	159	3,556	(95.5)
Others	20	0	20	0	-	71	2,615	(97.3)
MIDDLE EAST	84	0	84	0	-	429	10,231	(95.8)
Bahrain	5	0	5	0	-	31	549	(94.4)
Egypt	5	0	5	0	-	31	956	(96.8)
Iraq	0	0	0	0	-	15	138	(89.1)
Jordan	16	0	16	0	-	107	627	(82.9)
Kuwait	3	0	3	0	-	10	825	(98.8)
Lebanon	6	0	6	0	-	128	483	(73.5)
Oman	11	0	11	0	-	13	1,045	(98.8)
Qatar	0	0	0	0	-	3	129	(97.7)
Saudi Arabia	36	0	36	0	-	60	4,755	(98.7)
United Arab Emirates	0	0	0	0	-	20	352	(94.3)
Others	2	0	2	0	-	11	372	(97.0)
TOTAL	5,040	0	5,040	0	-	24,377	507,311	(95.2)



Top origin airports and airlines to Sri Lanka

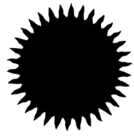
An analysis of the last departure airports (origin) to Sri Lanka reveals the vital importance of air connectivity in the tourism industry. As depicted in the below Table 4, for around 61% of tourists the last airports had been Doha Qatar, Dubai and Male. Further, in terms of airlines Sri Lankan Airlines, Qatar Airlines and Emirates are the top airlines, handling 91% of tourists to Sri Lanka.

Table 4. Top Last Departure Airports to Sri Lanka, August 2021

Rank	Airport	Number of tourists	% Share
1	DohaQatar	1,950	38.7
2	Dubai	587	11.6
3	Male	527	10.5
4	Karachi	237	4.7
5	London	195	3.9
6	Mumbai	184	3.7
7	Domodedovo	175	3.5
8	Frankfurt	154	3.1
9	Lahore	143	2.8
10	Chennai	138	2.7
11	Istanbul	106	2.1
12	London Heathrow	96	1.9
13	Jakarta	93	1.8
14	Bahrain	70	1.4
15	Muscat	54	1.1
16	Shanghai	46	0.9
17	Abu Dhabi	44	0.9
18	Singapore	42	0.8
19	Delhi	42	0.8
20	Sharjah	30	0.6
21	Others	127	2.5
	Total	5,040	100.0

Table 5. Top Airlines to Sri Lanka, August 2021

Rank	Airline	Number of Tourists	% Share
1	Sri Lankan Airlines	2,229	44.2
2	Qatar Airlines	1,803	35.8
3	Emirates	544	10.8
4	Turkish Airlines	134	2.7
5	Etihad Airways	63	1.3
6	Gulf Air	61	1.2
7	Air India	44	0.9
8	Singapore Airlines	38	0.8
9	Air Arabia	30	0.6
10	China Eastern Airlines	27	0.5
11	Other	67	1.3
	Total	5,040	100.0



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