

Monthly Tourist Arrivals Report:

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

July 2022

Sri Lanka Tourism Development Authority



Introduction

The following document provides a synthesis of the most recent July, 2022 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st July 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.





Table of contents

Summary	4
Tourist arrivals by region and percentage share, July 2022	5
Top primary markets and top potential markets, July 2022	6
Top ten source markets July, 2022	8
Tourist arrivals by purpose of visit, July 2022	11
Targeting VFR segment as a viable source for Sri Lanka Tourism	12
International tourists arrivals by country of residence	14
Main last departure airports and airlines to Sri Lanka, July 2022	18



Summary

The total number of international tourist arrivals to Sri Lanka during July 2022 was 47,293. Tourist arrivals for the month of July have plunged by almost 55.5%, in comparison to March 2022, which recorded the highest number of tourist arrivals up to July, 2022. This could be a result of internal factors such as the effects of the current economic and political situation in Sri Lanka and the external factors such as the

rising inflation and slowing growth that is indicative of stagflation in the main source markets.

As of 31st July 2022, 458,670 international tourists had visited Sri Lanka for this year. The largest source markets recorded for the month of July were the United Kingdom, India, Germany followed by France and Canada.

Table 1. Monthly tourist arrivals, July 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	30,207	1,917.8	(76.7)
June	146,828	1,614	32,856	1,935.7	(77.6)
July	217,829	2,429	47,293	1,847.1	(78.3)
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	458,670		



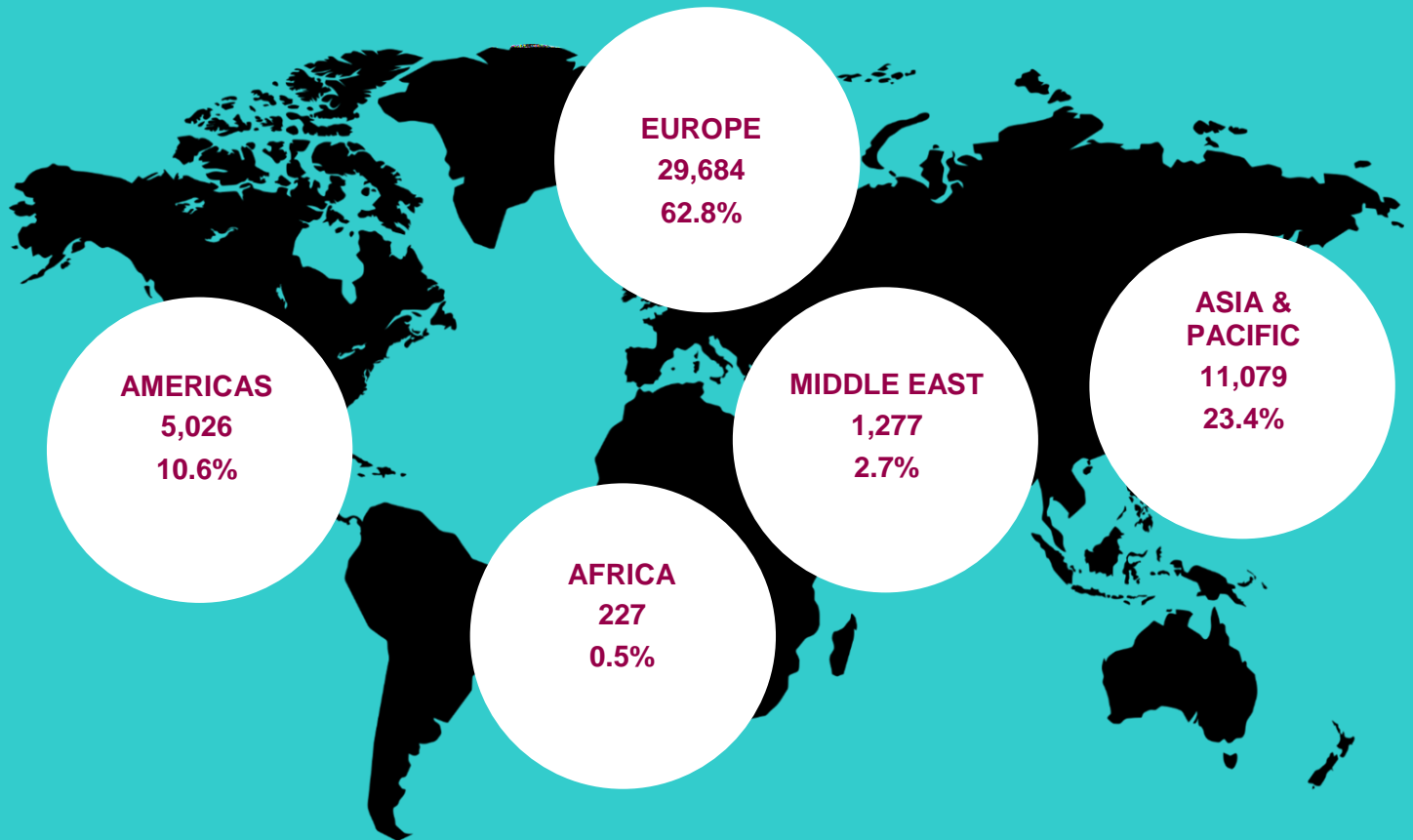
Tourist Arrivals | July 2022

47,293



Tourist arrivals by region and percentage share July 2022

Map 1. Tourist arrivals by region and percentage share



Europe became the largest source of tourist traffic to Sri Lanka with 62.8% of the total traffic received in July 2022. Pent up demand especially from countries such as the United Kingdom, Germany and France is likely to have driven this growth momentum. Asia and the Pacific accounted for 23.4% of total arrivals. The Americas accounted for 10.6% of the total traffic while the Middle East accounted for 2.7%.

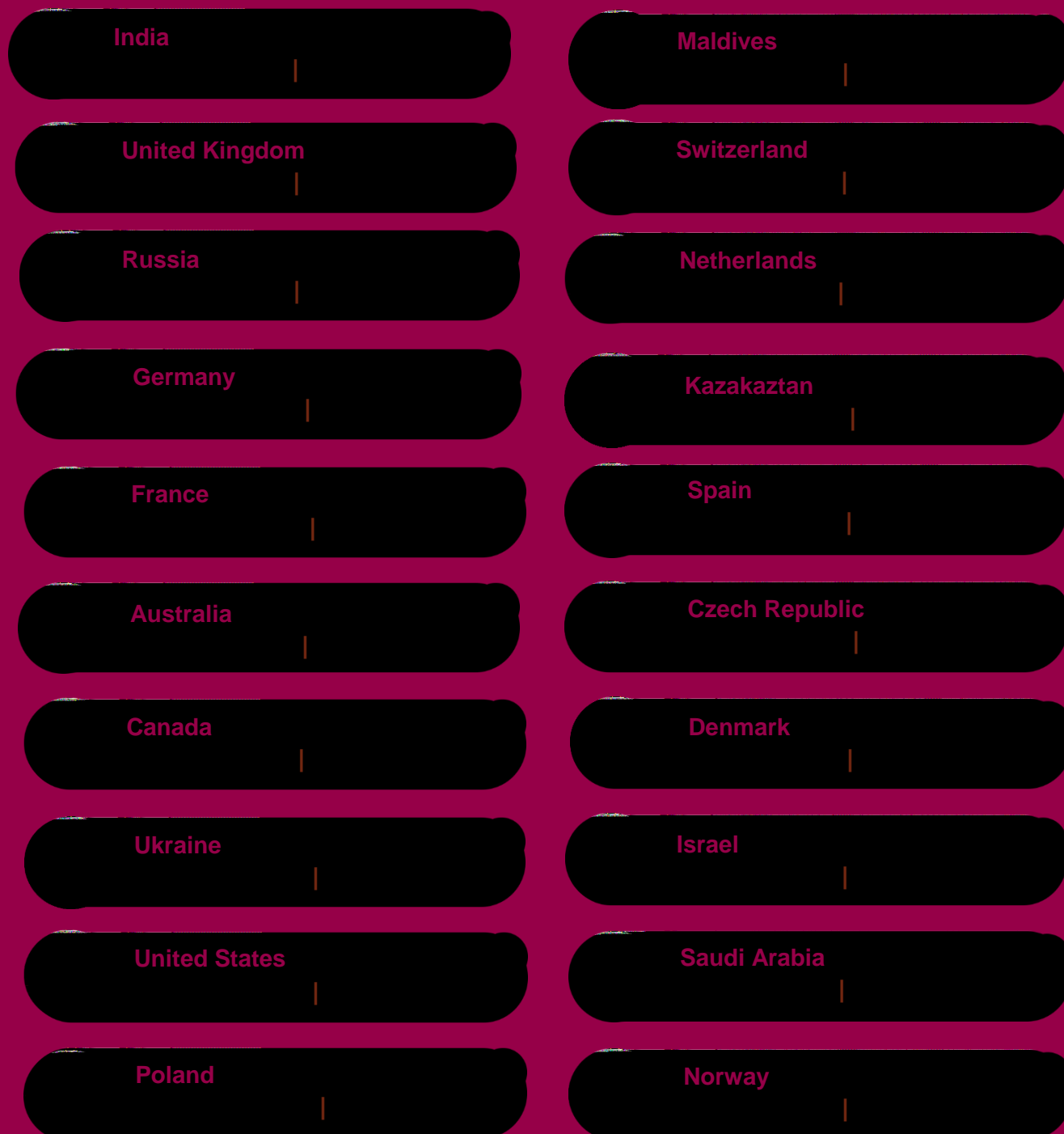
The gradual improvement in international travel is once again threatened and it is anticipated that the spillovers from Ukraine war will sharply hasten the deceleration of global economic activity. The war is leading to high commodity prices, adding to supply disruptions, increasing food insecurity & poverty, exacerbating inflation contributing to tighter financial vulnerabilities and policy uncertainty (Global Economic Prospects, 2022). Coupled with these, the internal factors such as the current economic crisis could create dual shocks on tourism industry.





Top primary markets and top potential markets

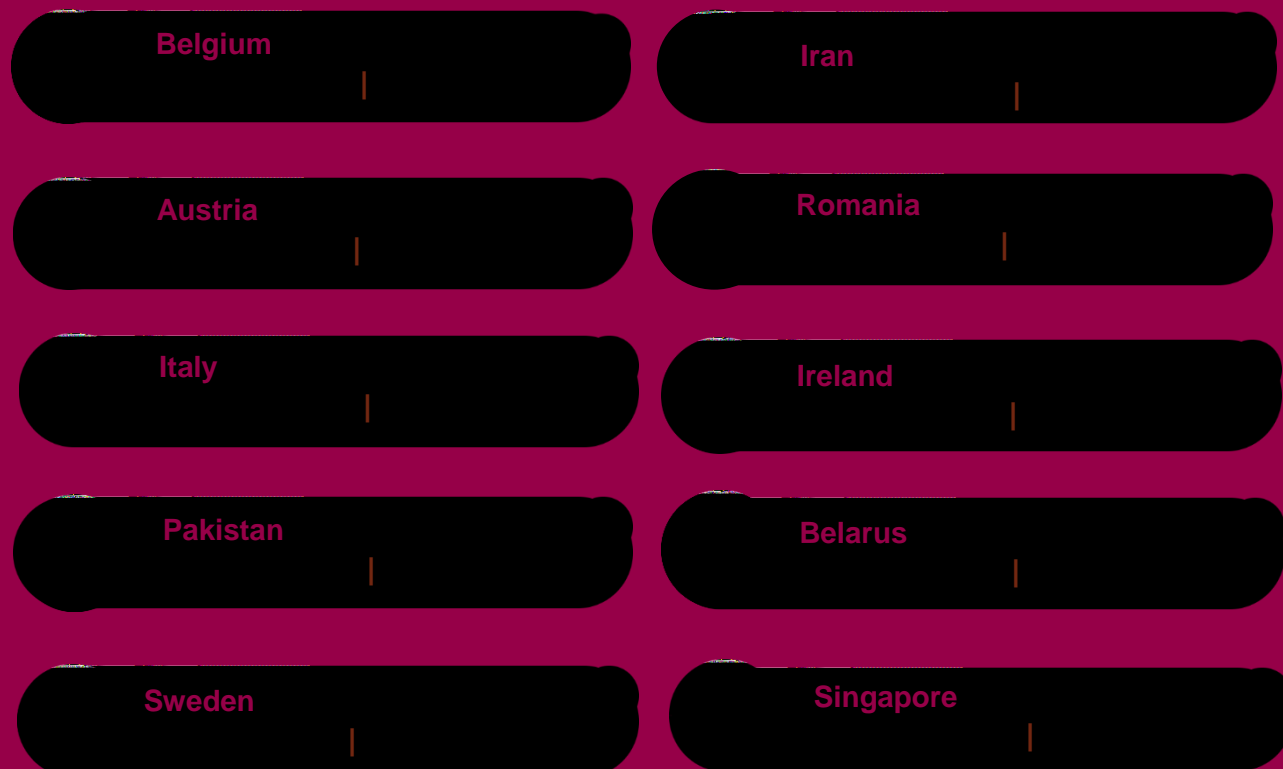
Top primary markets - January ~ July 2022



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 for Sri Lanka's tourism economy, including during the projected international tourism recovery period, 2022-2025.



Top Potential markets - January ~ July 2022



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 for Sri Lanka's tourism economy, including during the projected international tourism recovery period, 2022-2025.



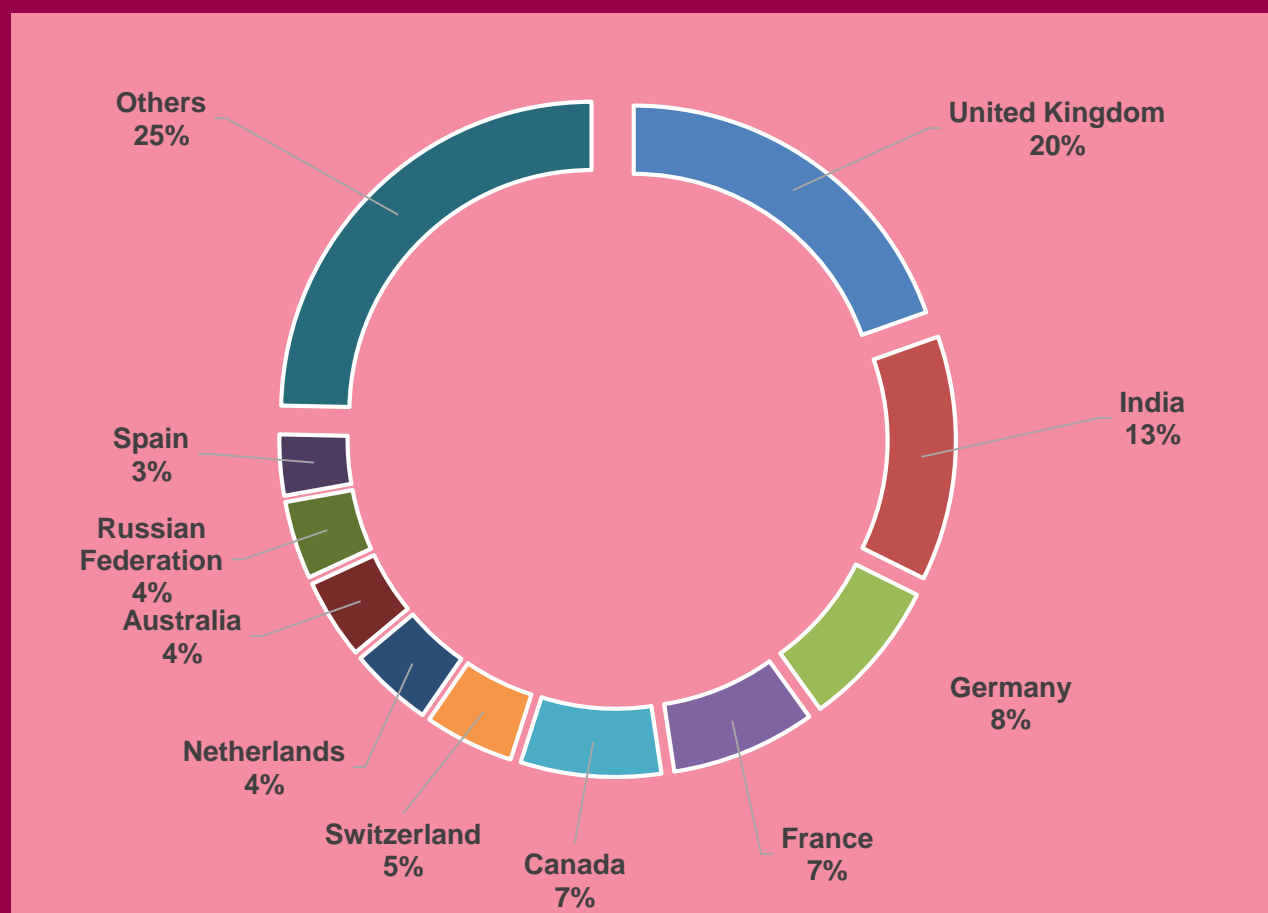
Top ten source markets

July 2022

The United Kingdom, India, Germany, France and Canada were Sri Lanka's top five international tourist generating markets for the month of July this year. The United Kingdom was the largest source of tourist visits to Sri Lanka with 20% of the total traffic received in July. India and Germany accounted for 13% and 8% of the total traffic respectively while France and Canada accounted for 7% (both). In

comparison to last month the source markets such as Germany and France have moved up the list of top ten markets whereas India and Australia have moved down the list. The negative spillovers of the war in Ukraine and the rising inflation could be the reasons behind the changing market trends which could create detrimental effects on tourism in Sri Lanka.

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



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

Rank	Country of Residence	Tourist Arrivals (July 2022)			Tourist Arrivals (July 2021)
		By Air	By Sea	Total	
			-		
1	United Kingdom	9,257	-	9,257	342
2	India	6,031		6,031	8
3	Germany	3,666	-	3,666	215
4	France	3,567	-	3,567	147
5	Canada	3,458	-	3,458	178
6	Switzerland	2,207	-	2,207	123
7	Netherlands	2,053	-	2,053	72
8	Australia	1,974	-	1,974	15
9	Russian Federation	1,918	-	1,918	66
10	Spain	1,499	-	1,499	15

Top ten source markets, January to July 2022

India, the United Kingdom, Russian Federation, Germany and France were Sri Lanka's top five international tourist-generating markets from January to July this year.

Table 3. Top ten markets to Sri Lanka, January to July 2021 & 2022

Rank	Country of Residence	Tourist Arrivals (Jan ~ July 2022)	Tourist Arrivals (Jan ~ July 2021)
1	India	74,792	1,127
2	United Kingdom	58,879	1,344
3	Russian Federation	48,321	702
4	Germany	37,108	1,723
5	France	25,451	1,028
6	Australia	16,514	178
7	Canada	16,475	666
8	Ukraine	13,840	2,679
9	United States	13,154	1,028
10	Poland	13,073	101
11	Other	141,063	8,761
Total		458,670	19,337



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

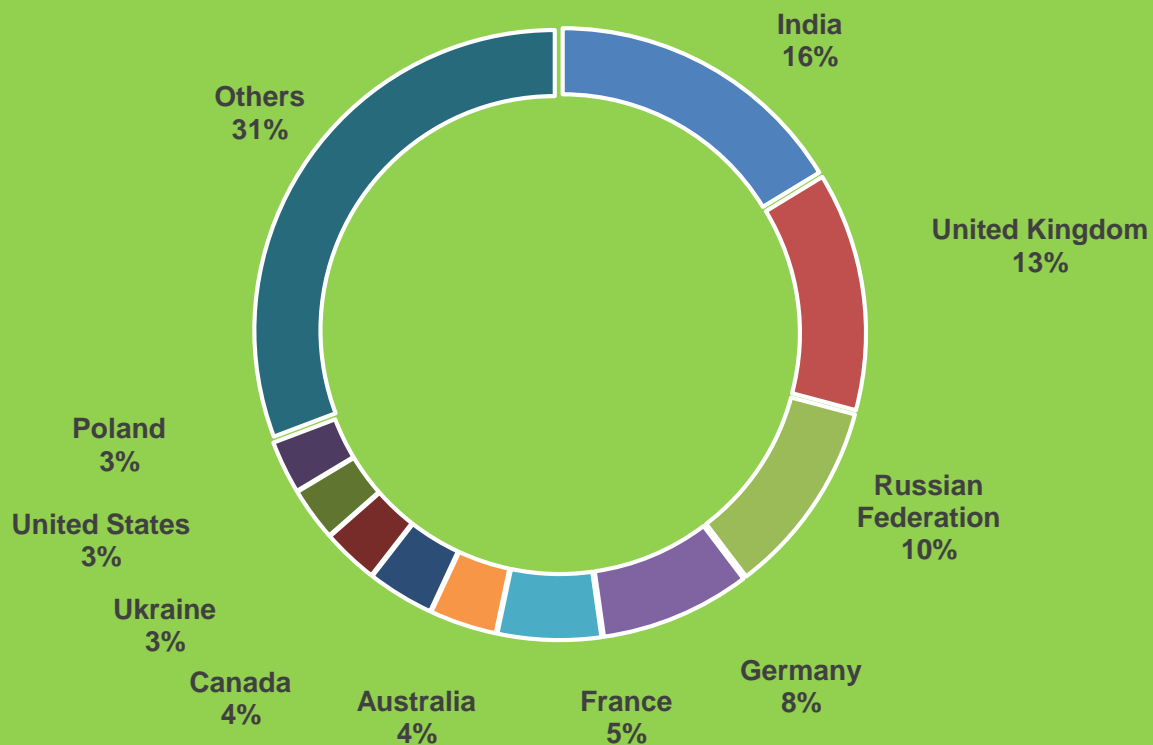
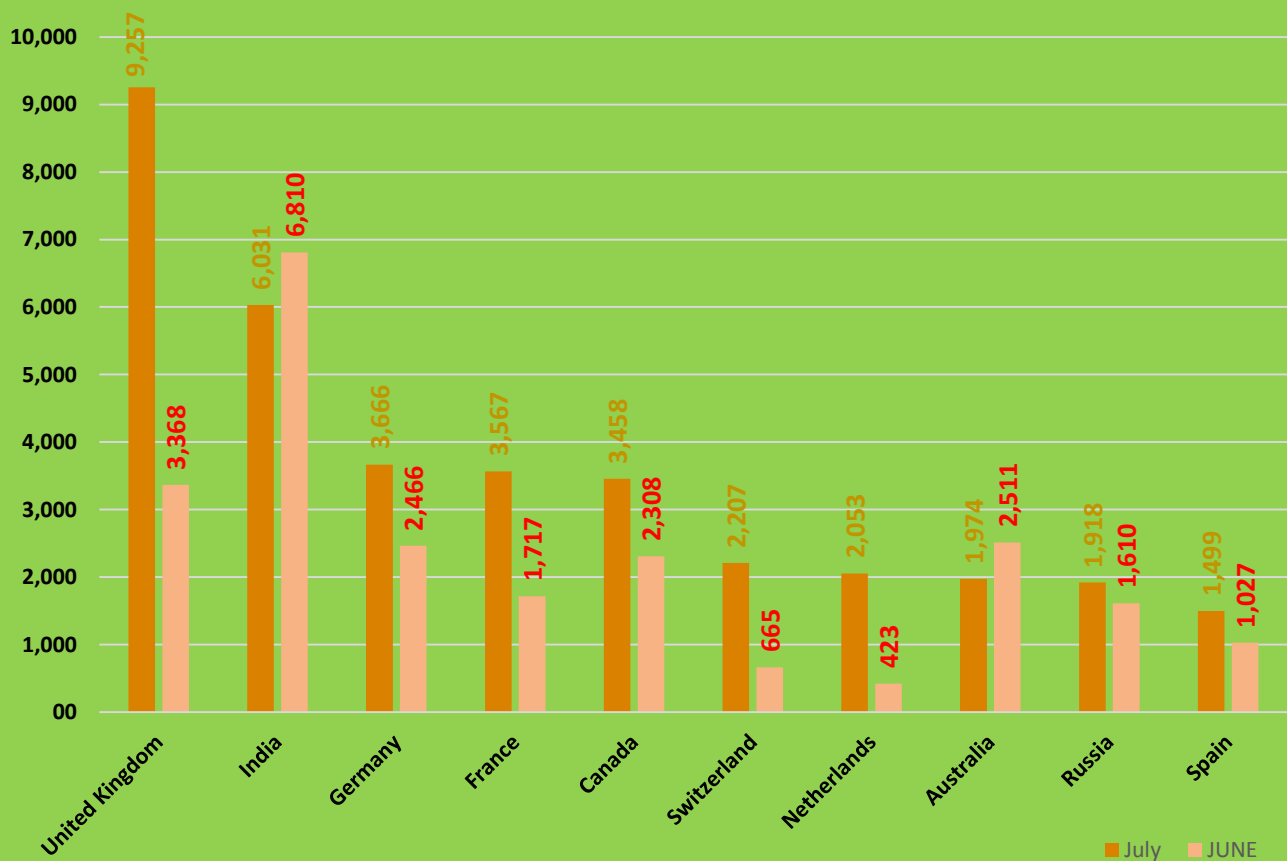


Chart 3. Comparison of arrivals from top ten markets to Sri Lanka, June 2022 / July 2022





Tourist arrivals by purpose of visit

July 2022

An analysis of tourist arrivals by purpose of visit reveals that a majority (46%) of tourists had visited Sri Lanka for visiting friends and relatives, while for 38% of tourists the main purpose was pleasure/vacation. In comparison to April 2022, the tourists who had visited Sri Lanka for pleasure/vacation purposes decreased while tourists who came for VFR purposes increased. The reason could be the expatriates who are visiting their friends & relatives as 25.4% of arrivals from the United Kingdom, 13.9% of arrivals from Canada and 10.7% of arrivals from India during the period from May to July were for the purpose of VFR. During the month of July only 6% of tourists had visited for business related purposes. 1% had visited for health related purposes, while 1% and 0.02% had visited for purposes such as sports and education.

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

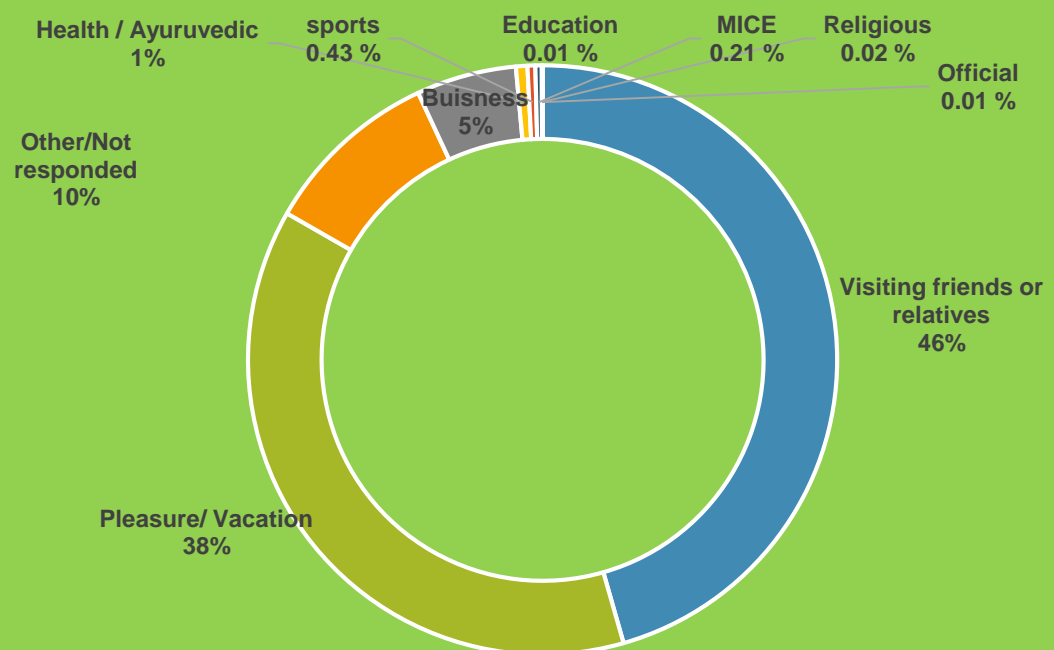
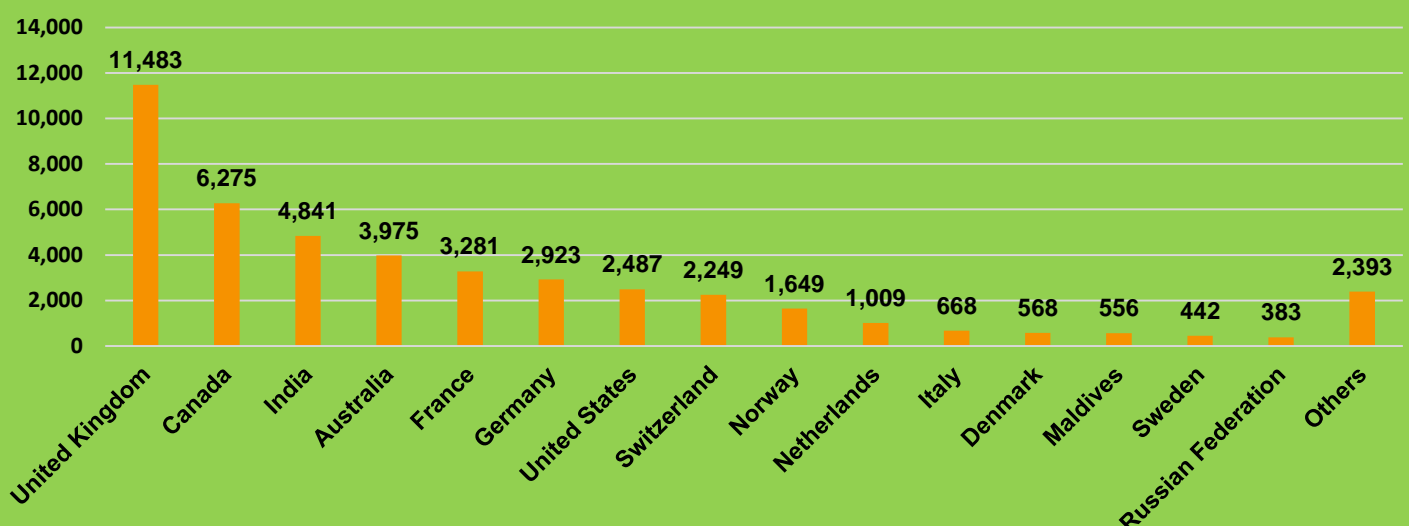


Chart 5. Tourist arrivals for VFR purpose, May to July





International tourist arrivals by country of residence

	July 2022			Tourist Arrivals July 2021	% Change July (22/21)	Total Tourist Arrivals up to July 2022	Total Tourist Arrivals up to July 2021	% Change up to July (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
AMERICAS	5,026	-	5,026	422	-	31,073	1,756	-
North America	4,945	-	4,945	420	-	29,809	1,701	-
Canada	3,458	-	3,458	178	-	16,475	666	-
Mexico	18	-	18	0	-	180	7	-
United States	1,469	-	1,469	242	-	13,154	1,028	-
Carribean & Central America	17	-	17	1	-	194	15	
Costa Rica	0	-	0	0		29	0	-
Jamaica	0	-	0	0	-	9	1	-
Others	17	-	17	1	-	156	14	-
South America	64	-	64	1	-	1,070	40	-
Argentina	8	-	8	1		148	7	-
Brazil	34	-	34	0	-	422	15	-
Chile	7	-	7	0	-	113	1	-
Colombia	8	-	8	0	-	206	13	-
Others	7	-	7	0	-	181	4	-
AFRICA	227	-	227	14	-	2,963	120	-
North Africa	106	-	106	8	-	1,264	15	-
Morocco	19	-	19	1	-	286	5	-
Sudan	65	-	65	2	-	618	4	-
Others	22	-	22	5	-	360	6	-
Sub-Saharan Africa	121	-	121	6	-	1,699	105	-
Kenya	5	-	5	0	-	129	2	-
Mauritius	7	-	7	1	-	58	4	-
Nigeria	1	-	1	0	-	17	2	-
South Africa	55	-	55	3	-	976	69	-
Others	53	-	53	2	-	519	28	-



	July 2022			Tourist Arrivals July 2021	% Change July (22/21)	Total Tourist Arrivals up to July 2022	Total Tourist Arrivals up to July 2021	% Change up to July (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	11,079	-	11,079	650	-	121,491	3,904	-
North East Asia	542	-	542	178	-	4,045	1,516	-
China	266	-	266	167	-	1,850	1,422	-
Japan	169	-	169	7	-	1164	67	-
South Korea	87	-	87	2	-	824	17	-
Taiwan	16	-	16	2	-	164	10	-
Others	4	-	4	0	-	43	0	-
South East Asia	594	-	594	49	-	6,081	245	-
Cambodia	14	-	14	0	-	71	1	-
Indonesia	30	-	30	21	-	471	48	-
Malaysia	123	-	123	2	-	1,304	19	-
Myanmar	16	-	16	0	-	143	15	-
Philippines	149	-	149	18	-	1,174	107	-
Singapore	156	-	156	4	-	1,877	25	-
Thailand	84	-	84	3	-	736	17	-
Vietnam	22	-	22	1	-	285	13	-
Others	0	-	0	0	-	20	0	-
Oceania	2,223		2,223	17	-	17,938	223	-
Australia	1,974	-	1,974	15	-	16,514	178	-
New Zealand	239	-	239	0	-	1,391	40	-
Others	10	-	10	2	-	33	5	-
South Asia	7,720	-	7,720	406	-	93,427	1,920	-
Afghanistan	2	-	2	0	-	21	4	-
Bangladesh	176	-	176	31	-	1,721	53	-
Bhutan	3	-	3	0	-	56	2	-
India	6,031	-	6,031	8	-	74,792	1,127	-
Iran	35	-	35	6	-	3,241	80	-
Maldives	1,207	-	1,207	249	-	9,596	462	-
Nepal	25	-	25	1	-	571	11	-
Pakistan	241	-	241	111	-	3,429	181	-
EUROPE	29,684	-	29,684	1,296	-	290,678	13,212	-
Northern Europe	10,922		10,922	452	-	76,057	1,743	-
Denmark	457	-	457	34	-	5,751	82	-
Finland	59	-	59	1	-	1118	25	-
Norway	757	-	757	39	-	4,441	125	-
Sweden	209	-	209	29	-	3,307	100	-
United Kingdom	9,257	-	9,257	342	-	58,879	1,344	-
Others	183	-	183	7	-	2,561	67	-



	July 2022			Tourist Arrivals July 2021	% Change July (22/21)	Total Tourist Arrivals up to July 2022	Total Tourist Arrivals up to July 2021	% Change up to July (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
Western Europe	12,924	-	12,924	626	-	88,293	3,622	-
Austria	299	-	299	47	-	3,901	158	-
Belgium	1,115	-	1,115	17	-	4,308	59	-
France	3,567	-	3,567	147	-	25,451	1,028	-
Germany	3,666	-	3,666	215	-	37,108	1,723	-
Netherlands	2,053	-	2,053	72	-	8,329	229	-
Switzerland	2,207	-	2,207	123	-	9,013	408	-
Others	17	-	17	5	-	183	17	-
Central/ Eastern Europe	2,966	-	2,966	135	-	105,391	7,325	-
Belarus	35	-	35	0	-	2,340	81	-
Czech Republic	217	-	217	17	-	6,168	147	-
Estonia	8	-	8	0	-	769	34	-
Hungary	42	-	42	2	-	1,774	21	-
Kazakhstan	12	-	12	2	-	7,644	3,190	-
Lithuania	52	-	52	2	-	1,653	25	-
Poland	344	-	344	8	-	13,073	101	-
Romania	64	-	64	0	-	2,456	46	-
Russia	1,918	-	1,918	66	-	48,321	702	-
Slovakia	112	-	112	11	-	1,852	104	-
Ukraine	58	-	58	13	-	13,840	2,679	-
Others	104	-	104	14	-	5,501	195	-
Southern/ Mediterranean Europe	2,872	-	2,872	83	-	20,937	522	-
Greece	40	-	40	3	-	556	13	-
Italy	650	-	650	32	-	3,855	179	-
Portugal	86	-	86	1	-	1277	21	-
Spain	1,499	-	1,499	15	-	7,118	129	-
Turkey	57	-	57	6	-	986	48	-
Israel	404	-	404	22	-	5,295	81	-
Others	136	-	136	4	-	1,850	51	-
MIDDLE EAST	1,277		1,277	47	-	12,465	345	-
Bahrain	36	-	36	3	-	339	26	-
Egypt	136	-	136	3	-	1,716	26	-
Iraq	98	-	98	8	-	808	15	-
Jordan	242	-	242	10	-	1480	91	-
Kuwait	78	-	78	1	-	661	7	-
Lebanon	108	-	108	7	-	1047	122	-
Oman	75	-	75	1	-	496	2	-
Qatar	38	-	38	0	-	181	3	-
Saudi Arabia	311	-	311	11	-	4,607	24	-
United Arab Emirates	112	-	112	3	-	780	20	-
Others	43	-	43	0	-	350	9	-
TOTAL	47,293	-	47,293	2,429	-	458,670	19,337	-



Main last departure airports and airlines to Sri Lanka July 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 5, for around 53% 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 79% of tourists to Sri Lanka.

Chart 6. Main last departure airports to Sri Lanka, July 2022

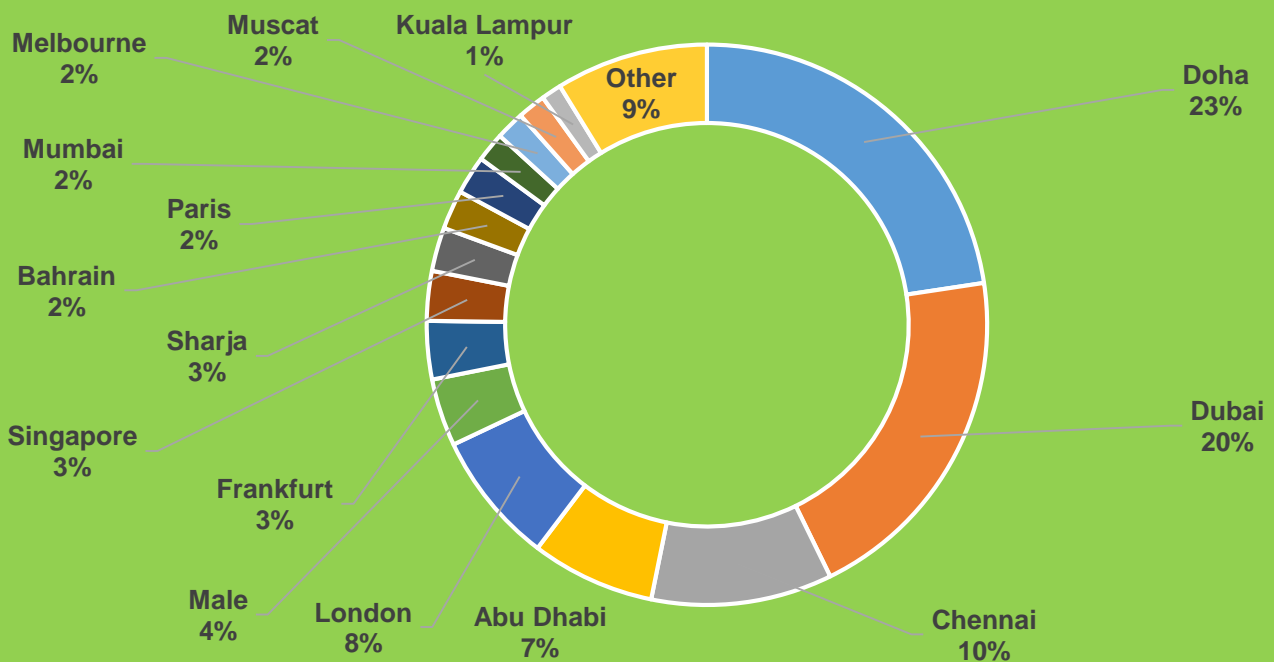
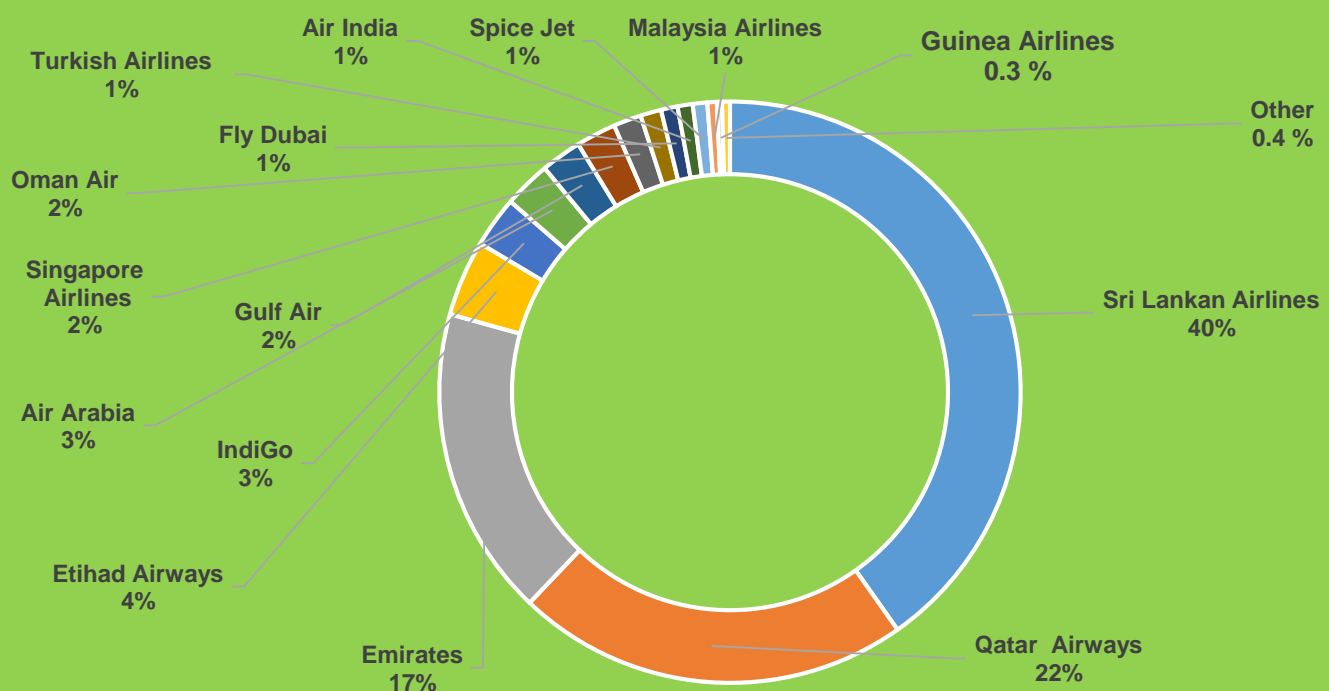


Chart 7. Main airlines to Sri Lanka, July 2022





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

July 2022

The below tables depict the main last departure airports and airlines analyzed by top markets to Sri Lanka. Sri Lankan Airlines and IndiGo are the most popular airlines for Indians. Air Arabia has become the most popular airline among tourists from Russia in the absence of the Aeroflot which ceased operations after 2nd June and Fly Dubai which suspended its operations by mid July. For majority of travellers from France, Spain and Canada, Qatar Airways is the most preferable airline and Doha is the main last departure airport. The figures further indicates that for tourists from United Kingdom, Australia, India, Netherlands and Germany, Sri Lankan Airlines is the most preferable Airline indicating the importance of destination accessibility in driving visitation.

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

Country	Number of Passengers																				
	Doha	Dubai	Chennai	Abu Dhabi	London	Male	Frankfurt	Singapore	Sharja	Bahrain	Paris	Mumbai	Melbourne	Muscat	Kuala Lumpur	Bangalore	Delhi	Istanbul	Sydney	Other	Total
United Kingdom	2,394	2,469	107	468	2,580	106	4	49	27	712	28	22	19	62	69	8	6	24	9	94	9,257
India	38	159	4,214	23	14	37	1	26	36	3	1	272	4	26	7	235	291	1	0	643	6,031
Germany	878	680	63	310	81	75	1,195	20	6	65	21	31	2	137	23	13	13	23	0	30	3,666
France	1,284	811	74	189	48	41	17	18	2	111	806	7	1	37	22	6	14	51	0	28	3,567
Canada	1,885	403	173	156	299	68	82	47	0	2	59	121	2	21	13	46	33	1	2	45	3,458
Switzerland	686	840	33	345	23	54	25	3	0	2	19	0	0	150	8	0	2	0	0	17	2,207
Netherlands	389	622	10	89	73	51	139	12	0	25	39	277	0	18	10	181	41	25	0	52	2,053
Australia	14	45	35	23	65	33	3	557	3	0	9	4	688	1	105	2	7	0	318	62	1,974
Russian Federation	22	262	9	689	1	42	2	3	782	14	0	0	0	10	5	3	13	17	0	44	1,918
Spain	754	216	6	317	39	33	17	0	6	6	3	1	1	5	14	0	10	53	0	18	1,499

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

Country	Percentage share of the airline																	
	Sri Lankan Airline	Qatar Airways	Emirates	Etihad Airways	Indigo	Air Arabia	Gulf Air	Singapore AI	Oman Air	Turkish Airline	Fly Dubai	Air India	Spicejet	Malaysian AI	Guinee Airlines	Air Asia	Other	Total
United Kingdom	32.5	25.8	26.2	4.8	0.1	0.3	7.7	0.4	0.7	0.3	0.3	0.3	0.0	0.4	0.0	0.2	0.1	9,257
India	65.8	0.5	1.1	0.2	20.3	0.7	0.0	0.1	0.3	0.0	0.2	4.3	6.0	0.0	0.3	0.0	0.1	6,031
Germany	45.9	23.5	17.4	4.9	0.4	0.2	1.8	0.2	3.7	0.6	0.4	0.2	0.1	0.1	0.1	0.3	0.1	3,666
France	31.1	35.5	22.0	3.6	0.3	0.1	3.1	0.2	1.0	1.4	0.1	0.6	0.1	0.3	0.0	0.2	0.2	3,567
Canada	38.3	51.0	4.2	3.6	0.3	0.0	0.1	1.1	0.5	0.0	0.1	0.4	0.1	0.1	0.0	0.2	0.0	3,458
Switzerland	21.1	30.6	31.8	7.6	0.3	0.0	0.1	0.1	6.8	0.0	0.4	0.9	0.1	0.2	0.0	0.0	0.1	2,207
Netherlands	53.3	18.9	20.4	3.0	0.0	0.0	1.2	0.2	0.9	1.2	0.1	0.0	0.2	0.0	0.0	0.4	0.0	2,053
Australia	67.6	0.6	1.5	0.8	0.3	0.2	0.0	24.0	0.1	0.0	0.2	0.2	0.0	4.4	0.0	0.4	0.0	1,974
Russian Federation	29.2	1.1	9.1	11.4	0.1	42.4	0.7	0.2	0.4	0.9	4.2	0.0	0.1	0.1	0.1	0.1	0.1	1,918
Spain	25.9	48.7	13.7	5.3	0.3	0.4	0.4	0.0	0.3	3.5	0.3	0.1	0.0	0.1	0.1	0.6	0.1	1,499



www.sltda.gov.lk

Research & International Relations Division

011 2426800 Ext. 151/155

research@srilanka.travel