

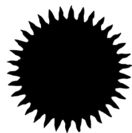
A decorative graphic in the bottom left corner of the page. It features a large, stylized sun with a thick, curved line for its body. To the right of the sun, there are several stylized leaves or petals arranged in a vertical, slightly curved line, resembling a flower or a branch. The entire graphic is rendered in a dark blue color.

Monthly Tourist Arrivals Report:

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

November 2021

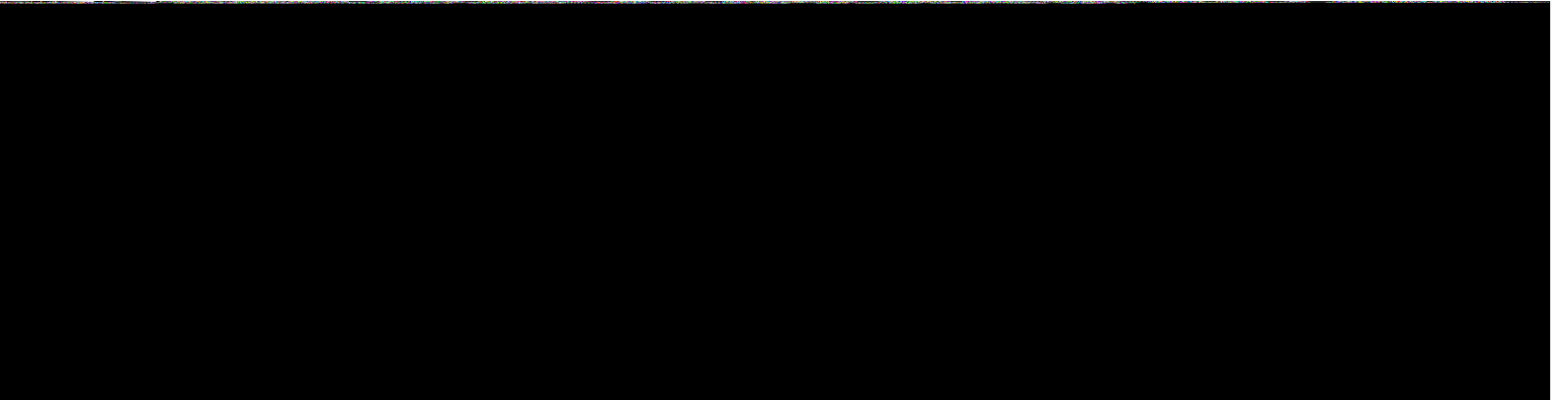
Sri Lanka Tourism Development Authority



Introduction

The following document provides a synthesis of the most recent November, 2021 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 4th November 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 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.



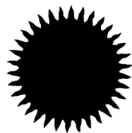


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Summary

The total number of international tourist arrivals to Sri Lanka during November 2021 was 44,294. A considerable improvement during the month of November can be noticed following the sharp contraction in arrivals after the month of April, 2021. This reflects the improvement in international arrivals potentially owing to factors such as vaccination advances around the world, softer restrictions for vaccinated travellers, use of digital tools to facilitate safe travel, such as the EU COVID Certificate and

growing consumer confidence in some outbound source markets. As of 30th November 2021, 104,989 international tourists had visited Sri Lanka for this year. It is a decline of 79.3% 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 November were India, the United Kingdom, and Russia, followed by Germany and Pakistan.

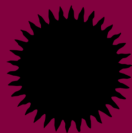
Table 1. Monthly tourist arrivals, November 2020 & 2021, and percentage change

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	13,547	-
October	0	22,771	-
November	0	44,294	-
December	393	-	-
Total (Jan – November)	507,311	104,989	(79.3)
TOTAL	507,704	-	



Tourist Arrivals | November 2021

44,294



Tourist arrivals by region and percentage share November 2021

Map 1. Tourist arrivals by region and percentage share



Asia and Pacific became the largest source of tourist traffic to Sri Lanka with 48.8% of the total traffic received in November 2021. Given the adverse impact of COVID-19 on the region, this can be considered as significant growth. Geographic proximity being one of the main drivers of destination choice now, pent up demand especially from countries such as China, Indonesia, Bangladesh, Pakistan, and India is likely to have driven this growth momentum. Europe accounted for 41.9% of the total traffic while the Americas accounted for 5.6%.

In comparison to November last year, all regions have recorded a decline in arrivals. Even though signs of recovery were evident, the uncertainty for the travel industry is mounting again with countries already practicing restrictions and border closures with the emergence of the new Omicron variant. In addition, increasing cases in Europe will further dampen consumer confidence which was gradually building after the devastating Delta variant.



Top primary markets and top potential markets November 2021

Top primary markets

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

Israel	Malaysia
Poland	Finland
Czech Republic	Thailand
Singapore	South Africa
Portugal	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

November, 2021

India, the United Kingdom, Russia, Germany and Pakistan were Sri Lanka's top five international tourist generating markets for the month of November this year. India was the largest source of tourist visits to Sri Lanka with 32.1% of the total traffic received in November. The United Kingdom and Russia accounted for 8.5% and 8% of the total traffic respectively. The growth in arrivals from countries in the Americas, and Western, Central & Eastern Europe, suggests a slight revitalization of leisure tourism, potentially enabled by factors such as the gradual improvement of traveller confidence, the lifting of travel restrictions, the increased roll out of COVID-19 vaccine programs, and the North American and Western Europe summer holiday period. Various accolades received highlighting Sri Lanka tourism in mainstream media, could have had some effect in boosting interest

in Sri Lanka, however destination marketing is cumulative and this recent PR will need to be followed up to have any lasting impact. However, with the surge in COVID cases in the European region it is anticipated that the current growth momentum will decline in the coming months.

The desire to visit friends and relatives (VFR) likely highly motivated travel consumers, especially from Canada, the United Kingdom, Australia and Malaysia to visit Sri Lanka during this period. The presence of Pakistan and India in the top source markets is noteworthy. Easing of border restrictions, the gradual containment of the pandemic and a continued promotion of air tickets especially for Indian tourists could be the likely factors that influenced the growth in arrivals.

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

Rank	Country of Residence	Tourist Arrivals (November 2021)			Tourist Arrivals (November 2020)
		By Air	By Sea	Total	
1	India	14,236	-	14,236	-
2	United Kingdom	3,770	-	3,770	-
3	Russian Federation	3,520	-	3,520	-
4	Germany	2,667	-	2,667	-
5	Pakistan	2,612	-	2,612	-
6	Maldives	1,464	-	1,464	-
7	France	1,447	-	1,447	-
8	United States	1,178	-	1,178	-
9	Canada	1,161	-	1,161	-
10	Australia	940	-	940	-

**Chart 1. Comparison of arrivals from top ten markets to Sri Lanka, Nov/Oct 2021**

Top ten source markets January –November 2021

India, the United Kingdom, Germany, Kazakhstan and Ukraine were Sri Lanka's top five international tourist-generating markets from January to November this year. All the countries, except Kazakhstan in the top ten markets from January to November, 2021, recorded declines in arrivals in comparison to the same period in 2020, likely due to the persistence of the pandemic situation and new COVID-19 outbreaks around the globe, Omicron being the most recent. It is noteworthy that total arrivals up to November from Kazakhstan had recorded a growth in comparison to total arrivals up to November 2020, likely owing to the pilot project carried out to revive the tourism industry following a 10-month pandemic-induced closure.

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

Rank	Country of Residence	Tourist Arrivals (Jan-November 2021)	Tourist Arrivals(Jan-November 2020)	%Change(Jan-November 2021 & Jan-November 2020)
1	India	32,702	89,357	(63.4)
2	United Kingdom	8,153	55,455	(85.3)
3	Germany	6,567	34,507	(81.0)
4	Russia	6,101	49,397	(87.6)
5	France	3,528	24,838	(85.8)
6	Ukraine	3,475	16,776	(79.3)
7	Canada	3,374	12,436	(72.9)
8	Kazakhstan	3,292	2,333	41.1
9	United States	3,240	16,842	(80.8)
10	China	2,159	26,147	(91.7)



Chart 2. Top ten source markets to Sri Lanka, January – November, 2021

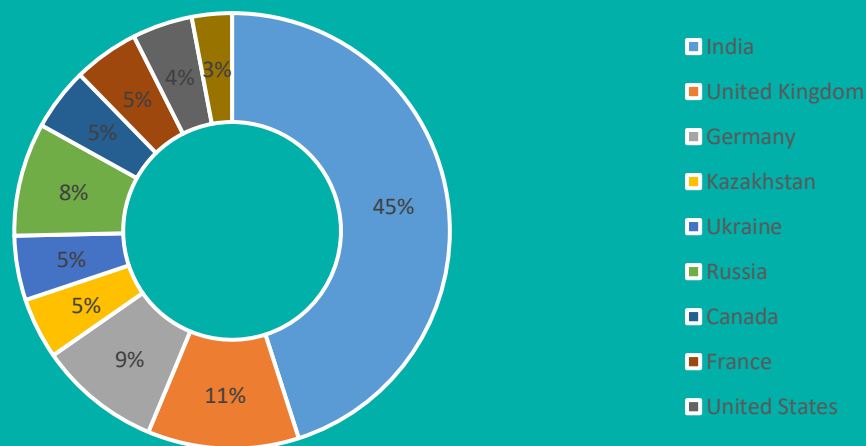
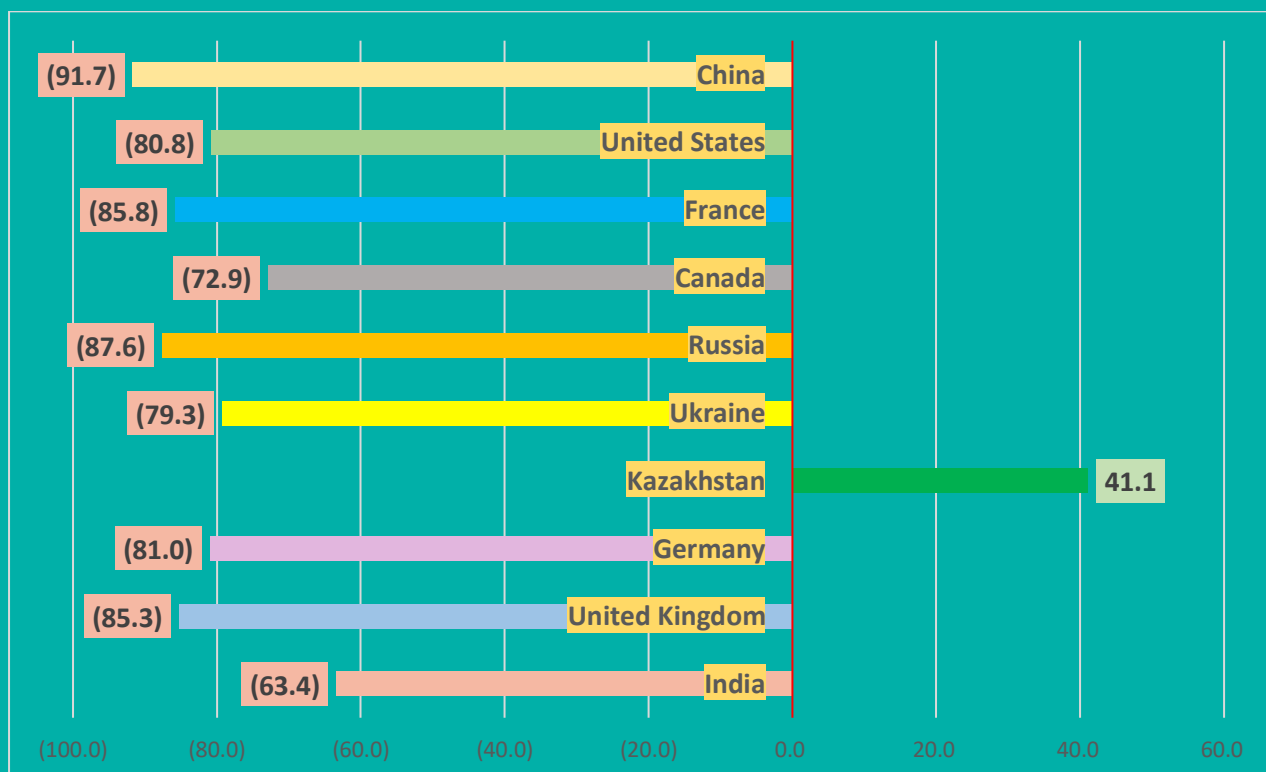


Chart 3. Top ten source markets, percentage changes, January– November 2021 & January– November 2020





International tourist arrivals by country of residence

	November-21			Total Tourist Arrivals November 2020	% Change November (20/21)	Total Tourist Arrivals up to November 2021	Total Tourist Arrivals up to November 2020	% Change up to November (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
AMERICAS	2,489	0	2,489	0	-	6,889	31,843	(78.4)
North America	2,352	0	2,352	0	-	6,651	29,627	(77.6)
Canada	1,161	0	1161	0	-	3,374	12,436	(72.9)
Mexico	13	0	13	0	-	37	349	(89.4)
United States	1,178	0	1178	0	-	3,240	16,842	(80.8)
Carribean& Central America	40	0	40	0	-	67	226	(70.4)
Costa Rica	1	0	1	0		1	33	(97.0)
Jamaica	2	0	2	0	-	4	25	(84.0)
Others	37	0	37	0	-	62	168	(63.1)
South America	97	0	97	0	-	171	1,990	(91.4)
Argentina	12	0	12	0		24	416	(94.2)
Brazil	30	0	30	0	-	61	875	(93.0)
Chile	4	0	4	0	-	8	271	(97.0)
Colombia	19	0	19	0	-	37	201	(81.6)
Others	32	0	32	0	-	41	227	(81.9)
AFRICA	229	0	229	0	-	453	2,880	(84.3)
North Africa	60	0	60	0	-	97	689	(85.9)
Morocco	20	0	20	0	-	34	311	(89.1)
Sudan	19	0	19	0	-	28	143	(80.4)
Others	21	0	21	0	-	35	235	(85.1)
Sub-Saharan Africa	169	0	169	0	-	356	2,191	(83.8)
Kenya	7	0	7	0	-	18	110	(83.6)
Mauritius	0	0	0	0	-	10	170	(94.1)
Nigeria	1	0	1	0	-	4	25	(84.0)
South Africa	60	0	60	0	-	163	1,364	(88.0)
Others	101	0	101	0	-	161	522	(69.2)



	November-21			Total Tourist Arrivals November 2020	% Change November (20/21)	Total Tourist Arrivals up to November 2021	Total Tourist Arrivals up to November 2020	% Change up to November (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	21,623	0	21,623	0	-	50,658	181,154	(72.0)
North East Asia	468	0	468	0	-	2,684	37,320	(92.8)
China	201	0	201	0	-	2,159	26,147	(91.7)
Japan	103	0	103	0	-	233	6,644	(96.5)
South Korea	162	0	162	0	-	269	2,499	(89.2)
Taiwan	2	0	2	0	-	23	1,985	(98.8)
Others	0	0	0	0	-	0	45	-
South East Asia	1,269	0	1,269	0	-	2,618	14,927	(82.5)
Cambodia	4	0	4	0	-	7	372	(98.1)
Indonesia	806	0	806	0	-	1,668	1,114	49.7
Malaysia	97	0	97	0	-	165	3,494	(95.3)
Myanmar	9	0	9	0	-	30	532	(94.4)
Philippines	116	0	116	0	-	351	4,249	(91.7)
Singapore	167	0	167	0	-	251	2,545	(90.1)
Thailand	62	0	62	0	-	118	1,880	(93.7)
Vietnam	8	0	8	0	-	28	709	(96.1)
Others	0	0	0	0	-	0	32	(100.0)
Oceania	1,028	0	1,028	0	-	1464	22,706	(93.6)
Australia	940	0	940	0	-	1292	20,283	(93.6)
New Zealand	80	0	80	0	-	158	2,324	(93.2)
Others	8	0	8	0	-	14	99	(85.9)
South Asia	18,858	0	18,858	0	-	43,892	106,201	(58.7)
Afghanistan	1	0	1	0	-	10	146	(93.2)
Bangladesh	372	0	372	0	-	952	1,986	(52.1)
Bhutan	2	0	2	0	-	4	208	(98.1)
India	14,236	0	14,236	0	-	32,702	89,357	(63.4)
Iran	106	0	106	0	-	216	648	(66.7)
Maldives	1,464	0	1464	0	-	3,376	9,407	(64.1)
Nepal	65	0	65	0	-	116	1,384	(91.6)
Pakistan	2,612	0	2,612	0	-	6,516	3,065	112.6
EUROPE	18,545	0	18,545	0	-	44,792	281,203	(84.1)
Northern Europe	4,753	0	4753	0	-	10,422	75,146	(86.1)
Denmark	316	0	316	0	-	646	4,905	(86.8)
Finland	65	0	65	0	-	146	2298	(93.6)
Norway	237	0	237	0	-	694	3019	(77.0)
Sweden	264	0	264	0	-	531	7061	(92.5)
United Kingdom	3770	0	3770	0	-	8,153	55455	(85.3)
Others	101	0	101	0	-	252	2408	(89.5)



	November-21			Total Tourist Arrivals November 2020	% Change November (20/21)	Total Tourist Arrivals up to November 2021	Total Tourist Arrivals up to November 2020	% Change up to November (20/21)
	By Air	By Sea	Total					
Western Europe	6,017	0	6,017	0	-	14,486	82,229	(82.4)
Austria	267	0	267	0	-	675	4,300	(84.3)
Belgium	318	0	318	0	-	644	3,371	(80.9)
France	1447	0	1447	0	-	3,528	24,838	(85.8)
Germany	2667	0	2667	0	-	6,567	34,507	(81.0)
Netherlands	598	0	598	0	-	1278	8,656	(85.2)
Switzerland	698	0	698	0	-	1749	6,389	(72.6)
Others	22	0	22	0	-	45	168	(73.2)
Central/ Eastern Europe	5,980	0	5,980	0	-	16,214	100,373	(83.8)
Belarus	120	0	120	0	-	257	2,638	(90.3)
Czech Republic	429	0	429	0	-	777	7,599	(89.8)
Estonia	50	0	50	0	-	116	1,185	(90.2)
Hungary	63	0	63	0	-	123	1,588	(92.3)
Kazakhstan	85	0	85	0	-	3,292	2,333	41.1
Lithuania	130	0	130	0	-	228	1,054	(78.4)
Poland	460	0	460	0	-	731	11,908	(93.9)
Romania	145	0	145	0	-	239	1,724	(86.1)
Russia	3520	0	3520	0	-	6,101	49,397	(87.6)
Slovakia	168	0	168	0	-	353	1,513	(76.7)
Ukraine	565	0	565	0	-	3,475	16,776	(79.3)
Others	245	0	245	0	-	522	2,658	(80.4)
Southern/ Mediterranea Europe	1,795	0	1,795	0	-	3,670	23,455	(84.4)
Greece	46	0	46	0	-	90	1,573	(94.3)
Italy	313	0	313	0	-	753	8,603	(91.2)
Portugal	141	0	141	0	-	238	1,602	(85.1)
Spain	463	0	463	0	-	1121	3,385	(66.9)
Turkey	65	0	65	0	-	168	2,121	(92.1)
Israel	624	0	624	0	-	1040	3,556	(70.8)
Others	143	0	143	0	-	260	2,615	(90.1)
MIDDLE EAST	1,408	0	1,408	0	-	2,197	10,231	(78.5)
Bahrain	10	0	10	0	-	47	549	(91.4)
Egypt	80	0	80	0	-	132	956	(86.2)
Iraq	91	0	91	0	-	147	138	6.5
Jordan	183	0	183	0	-	359	627	(42.7)
Kuwait	34	0	34	0	-	68	825	(91.8)
Lebanon	126	0	126	0	-	295	483	(38.9)
Oman	69	0	69	0	-	114	1,045	(89.1)
Qatar	12	0	12	0	-	22	129	(82.9)
Saudi Arabia	693	0	693	0	-	855	4,755	(82.0)
United Arab Emirates	60	0	60	0	-	85	352	(75.9)
Others	50	0	50	0	-	73	372	(80.4)
TOTAL	44,294	0	44,294	0	-	104,989	507,311	(79.3)



Main last departure airports and airlines to Sri Lanka, November 2021

An analysis of the last departure airports to Sri Lanka reveals the importance of air connectivity in the tourism industry. As depicted in the below Chart 4, for around 42% of tourists the last airports had been, Dubai, Doha and Chennai. Further, in terms of airlines, Sri Lankan Airlines, Qatar Airways and Emirates were the top airlines, handling 77% of tourists to Sri Lanka.

Chart 4. Main last departure airports to Sri Lanka, November 2021

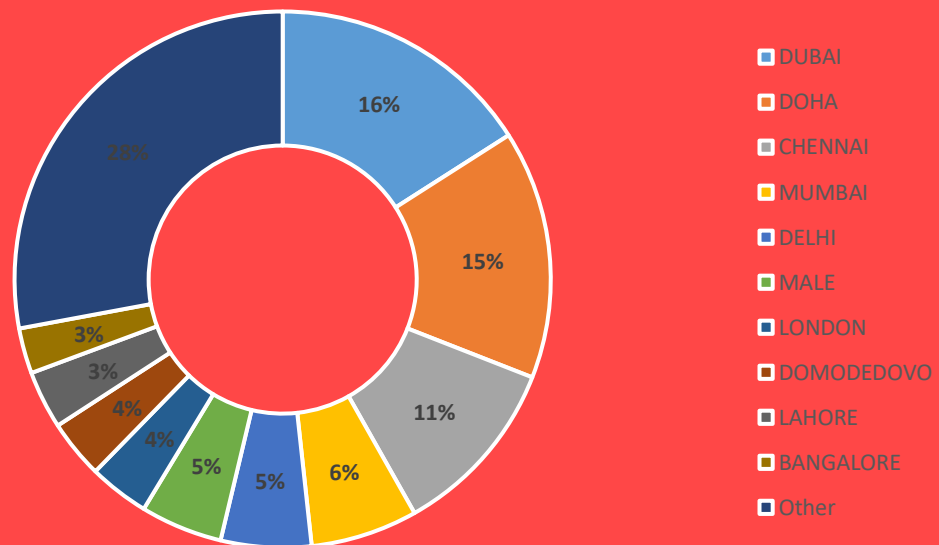
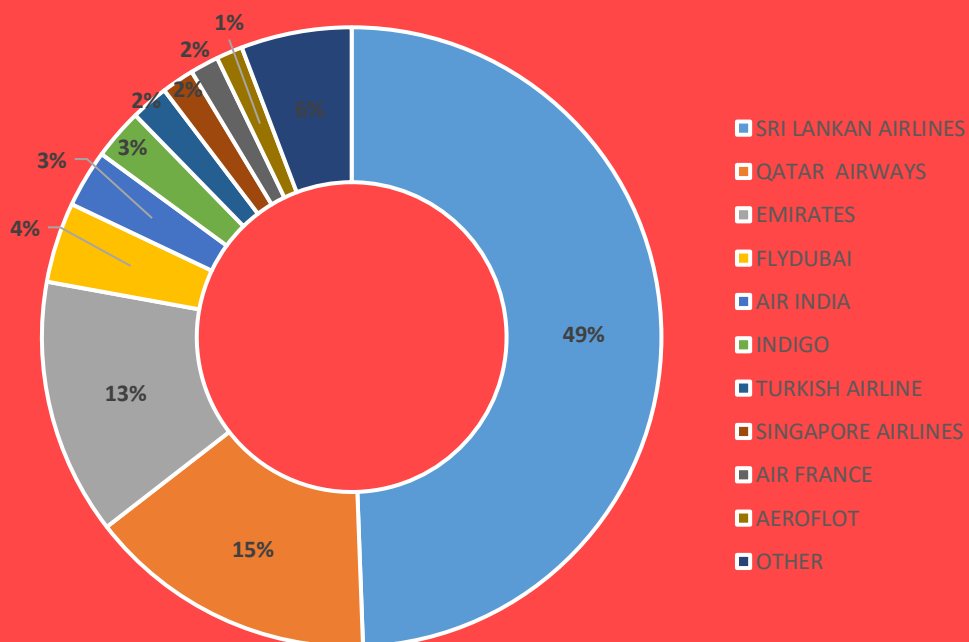


Chart 5. Main airlines to Sri Lanka, November 2021





Top ten markets versus main last departure airports and main airlines to Sri Lanka, November 2021

The below tables depict the main last departure airports and airlines analyzed by top markets to Sri Lanka. The data further hints to the importance of destination accessibility in driving visitation. Establishing direct air access especially to Europe is key to increasing tourism and in identifying this, steps were taken to launch direct flights with several airlines such as Aeroflot, Azur Air, Neos, Air France, US-Bangla, Arkia and Swiss Air, commencing from November. With the resumption of flights by SriLankan Airlines to Paris from November, the percentage share of the passengers using SriLankan Airlines in comparison to October 2021, has increased. Further, it is noteworthy that 18.2% of passengers from France have used Air France in travelling to Sri Lanka. In addition, as a new direct flight, Aeroflot has been patronised by 16.8% of tourists from Russia. As depicted in Table 5, 76.3% of Indians have used SriLankan Airlines in travelling to Sri Lanka and this could be likely due to the air ticket promotion offered to Indian tourists.

Table 4. Top ten markets vs. main last departure airports to Sri Lanka, November 2021

Top Ten Markets	Number of Passengers																							
	Chennai	Mumbai	Dubai	Delhi	Doha	Lahore	Domodedovo	Bangalore	Hyderabad	Male	Karachchi	Dubai/Male	Paris	Frankfurt	Moscow	Tiruchirapalli	Singapore	Madurai	Sydney	Sharjah	London	Melbourne	Other ports	Total
India	4,659	2,779	253	227,6	54	0	0	1,159	827	16	107	28	3	3	2	503	67	386	83	14	6	25	986	14,236
United Kingdom	29	13	637	15	1,136	5	1	4	5	24	3	102	16	4	0	7	10	1	0	3	1,231	2	522	3,770
Russia	4	2	543	4	482	0	1,498	0	3	7	0	58	6	3	216	4	0	0	0	185	2	0	107	3,520
Germany	14	2	844	3	724	0	3	3	0	18	0	59	100	564	2	0	0	1	0	3	31	1	295	2,667
Pakistan	0	0	100	0	15	1519	0	0	0	50	651	52	0	0	0	0	0	0	1	44	1	1	178	2,612
Maldives	0	1	310	0	1	0	0	3	0	640	0	461	0	0	0	0	2	0	0	0	20	3	23	1,464
France	9	4	324	7	268	0	1	1	4	31	1	30	456	10	0	0	5	0	0	2	38	0	256	1,447
United States	30	28	229	34	534	2	1	17	20	20	2	39	9	4	5	0	23	1	0	1	33	1	145	1,178
Canada	12	4	196	3	556	4	0	0	2	5	5	4	103	26	0	1	3	0	0	2	119	0	116	1,161
Australia	15	4	34	21	14	3	1	5	4	2	1	4	0	1	0	1	409	0	194	0	4	172	51	940

**Table 5. Top ten markets vs. main airlines to Sri Lanka, November 2021**

Top Ten Markets	Percentage share of the airline																Total Passengers
	Sri Lankan Airlines	Qatar Airways	Emirates	Aeroflot	Air India	IndiGo	Fly Dubai	Vistara	Singapore Airlines	Air France	Air Arabia	Turkish Airlines	Etihad Airways	Gulf Air	Oman Air	Other Airlines	
India	76.3	0.4	1.2	0.0	9.0	8.0	0.4	4.0	0.3	0.0	0.1	0.0	0.1	0.1	0.0	0.2	14,236
United Kingdom	45.7	30.2	16.2	0.0	0.1	0.2	2.7	0.2	0.2	0.5	0.1	0.5	0.5	2.0	0.5	0.5	3,770
Russia	44.1	13.7	11.1	16.8	0.1	0.1	5.3	0.0	0.0	0.2	5.3	2.0	0.0	0.6	0.0	0.8	3,520
Germany	26.3	27.6	28.1	0.1	0.2	0.0	4.9	0.0	0.0	6.1	0.1	1.8	1.5	0.6	0.7	1.9	2,667
Pakistan	89.9	0.6	4.7	0.0	0.0	0.0	0.7	0.0	0.0	0.0	1.7	0.0	0.0	0.2	2.2	0.1	2,612
Maldives	46.6	0.0	51.7	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.4	0.0	0.2	0.0	1.0	1,464
France	32.3	19.1	15.5	0.0	0.2	0.1	6.8	0.0	0.3	18.2	0.1	3.5	1.0	0.7	1.5	0.7	1,447
United States	21.8	41.8	19.2	0.4	0.9	1.0	3.1	1.4	2.0	1.0	0.1	2.0	4.8	0.1	0.0	0.5	1,178
Canada	31.7	49.7	13.3	0.0	0.1	0.1	0.9	0.1	0.3	0.5	0.2	0.9	1.2	0.3	0.0	0.9	1,161
Australia	49.3	1.6	2.9	0.0	0.4	0.2	0.7	0.3	43.9	0.2	0.0	0.1	0.2	0.0	0.1	0.0	940

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