

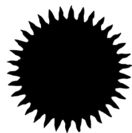


Monthly Tourist Arrivals Report:

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

December 2021

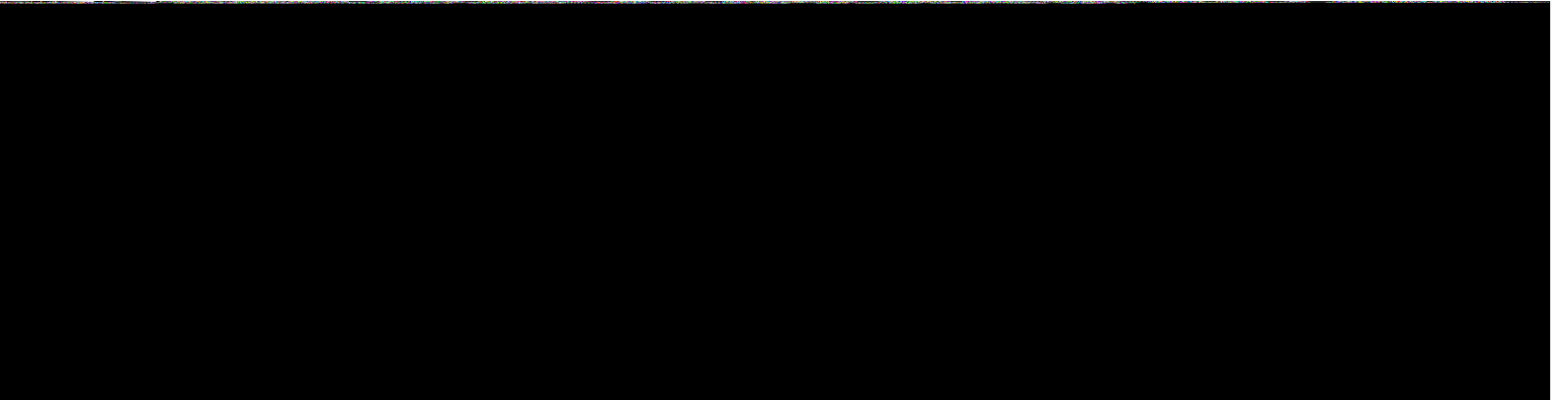
Sri Lanka Tourism Development Authority



Introduction

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



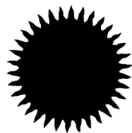


Table of contents

Summary	4
Tourist arrivals by region and percentage share, December 2021	5
Top primary markets and top potential markets, December 2021	6
Top ten source markets December, 2021	8
International tourist arrivals by country of residence	11
Main last departure airports and airlines to Sri Lanka, December 2021	14
Top ten markets versus main last departure airports and main airlines to Sri Lanka, December 2021	15



Summary

The total number of international tourist arrivals to Sri Lanka during December 2021 was 89,506. A significant improvement during the month of December 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 31st December 2021, 194,495 international tourists had visited Sri Lanka for this year. It is a decline of 61.7% over last year when 507,704 tourists had visited the country from January to December, 2020.

The largest source markets recorded for the month of December were India, Russia, the United Kingdom, followed by Germany and Ukraine.

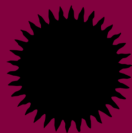
Table 1. Monthly tourist arrivals, December 2020 & 2021, and percentage change

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	89,506	-
TOTAL	507,704	194,495	(61.7)



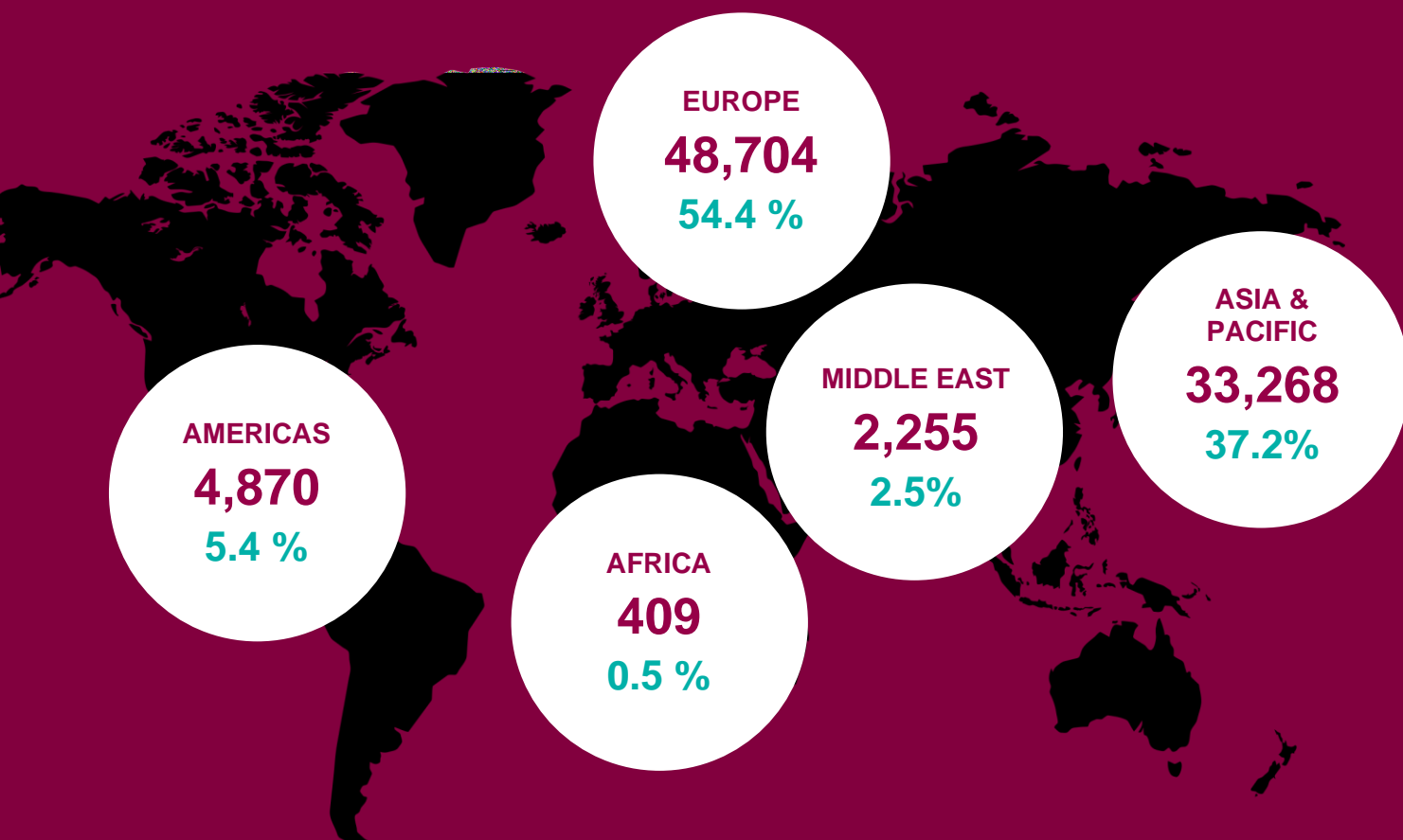
Tourist Arrivals | December 2021

89,506



Tourist arrivals by region and percentage share December 2021

Map 1. Tourist arrivals by region and percentage share



Europe became the largest source of tourist traffic to Sri Lanka with 54.4% of the total traffic received in December 2021. Given the escalating number of COVID-19 cases, this can be considered as significant growth. Pent up demand especially from countries such as Russia, the United Kingdom, Germany, France and Ukraine is likely to have driven this growth momentum. Asia and Pacific accounted for 37.2% of total arrivals. Americas accounted for 5.4% of the total traffic while the Middle East accounted for 2.5%.

In comparison to December 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. It is anticipated that, 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 December 2021

Top primary markets

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

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

Poland	Malaysia
Czech Republic	Portugal
Israel	Thailand
Singapore	South Africa
Finland	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 December, 2021

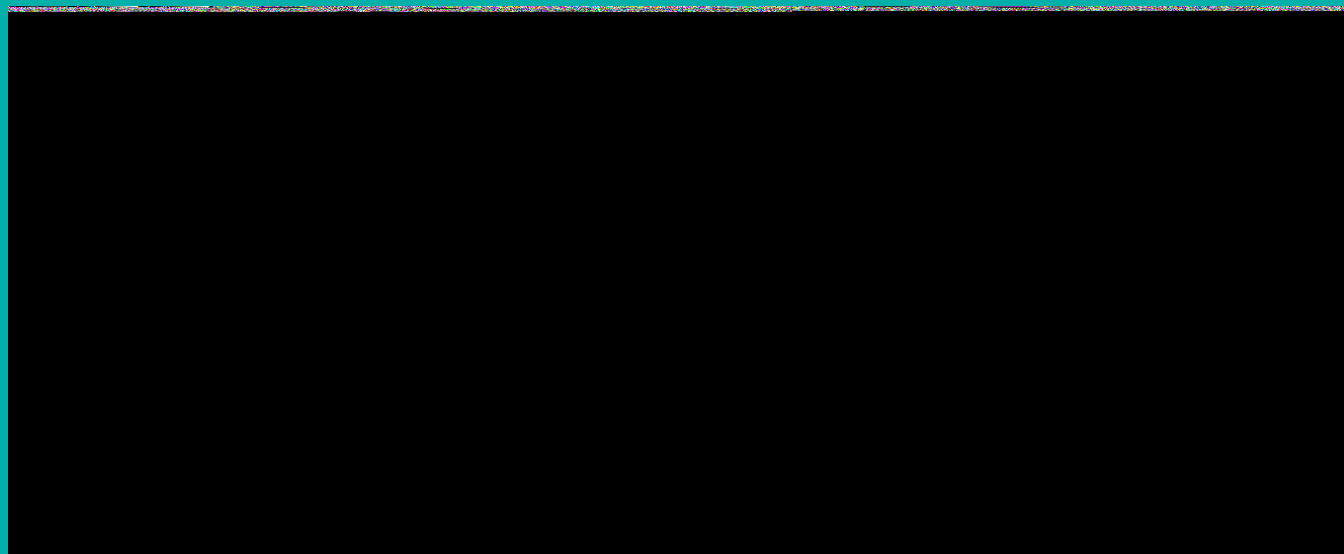
India, Russia, the United Kingdom, Germany and Ukraine were Sri Lanka's top five international tourist generating markets for the month of December this year. India was the largest source of tourist visits to Sri Lanka with 26.3% of the total traffic received in December. Russia and the United Kingdom accounted for 12% and 9.5% 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. 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 and Australia to visit Sri Lanka during this period. The persistence of India in the top source markets is noteworthy. Easing of border restrictions, the gradual containment of the pandemic could be the likely factors that influenced the growth in arrivals..

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

Rank	Country of Residence	Tourist Arrivals (December 2021)			Tourist Arrivals (December 2020)
		By Air	By Sea	Total	
1	India	23,566	-	23,566	-
2	Russian Federation	10,793	-	10,793	-
3	United Kingdom	8,493	-	8,493	-
4	Germany	5,875	-	5,875	-
5	Ukraine	3,562	-	3,562	393
6	Australia	3,129	-	3,129	-
7	France	3,021	-	3,021	-
8	Maldives	2,896	-	2,896	-
9	United States	2,884	-	2,884	-
10	Kazakhstan	2,462	-	2,462	-

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

Top ten source markets January –December 2021

India, Russia, the United Kingdom, Germany, and Ukraine were Sri Lanka's top five international tourist-generating markets from January to December this year. All the countries, except Kazakhstan in the top ten markets from January to December, 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 December from Kazakhstan had recorded a growth in comparison to total arrivals up to December 2020, likely owing to the pilot project carried out to revive the tourism industry following a 10-month pandemic-induced closure. In addition, a similar growth was observed from the countries such as Indonesia, Pakistan, Iraq, Jordan and Lebanon.

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

Rank	Country of Residence	Tourist Arrivals (Jan-Dec 2021)	Tourist Arrivals(Jan-Dec 2020)	%Change (Jan-Dec 2021 & Jan-Dec 2020)
1	India	56,268	89,357	(37.0)
2	Russia	16,894	49,397	(65.8)
3	United Kingdom	16,646	55,455	(70.0)
4	Germany	12,442	34,507	(63.9)
5	Pakistan	7,520	3,065	145.3
6	Ukraine	7,037	17,169	(59.0)
7	France	6,549	24,838	(73.6)
8	Maldives	6,272	9,407	(33.3)
9	United States	6,124	16,842	(63.6)
10	Kazakhstan	5,754	2,333	146.6



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

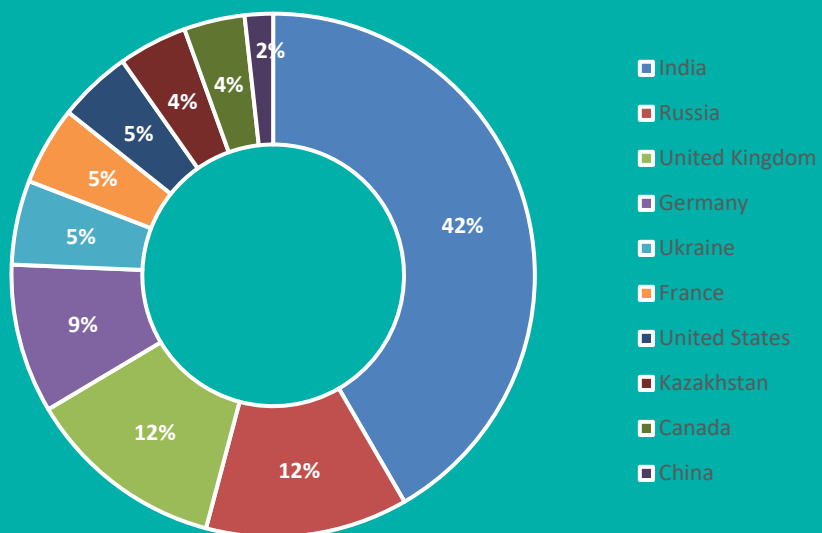
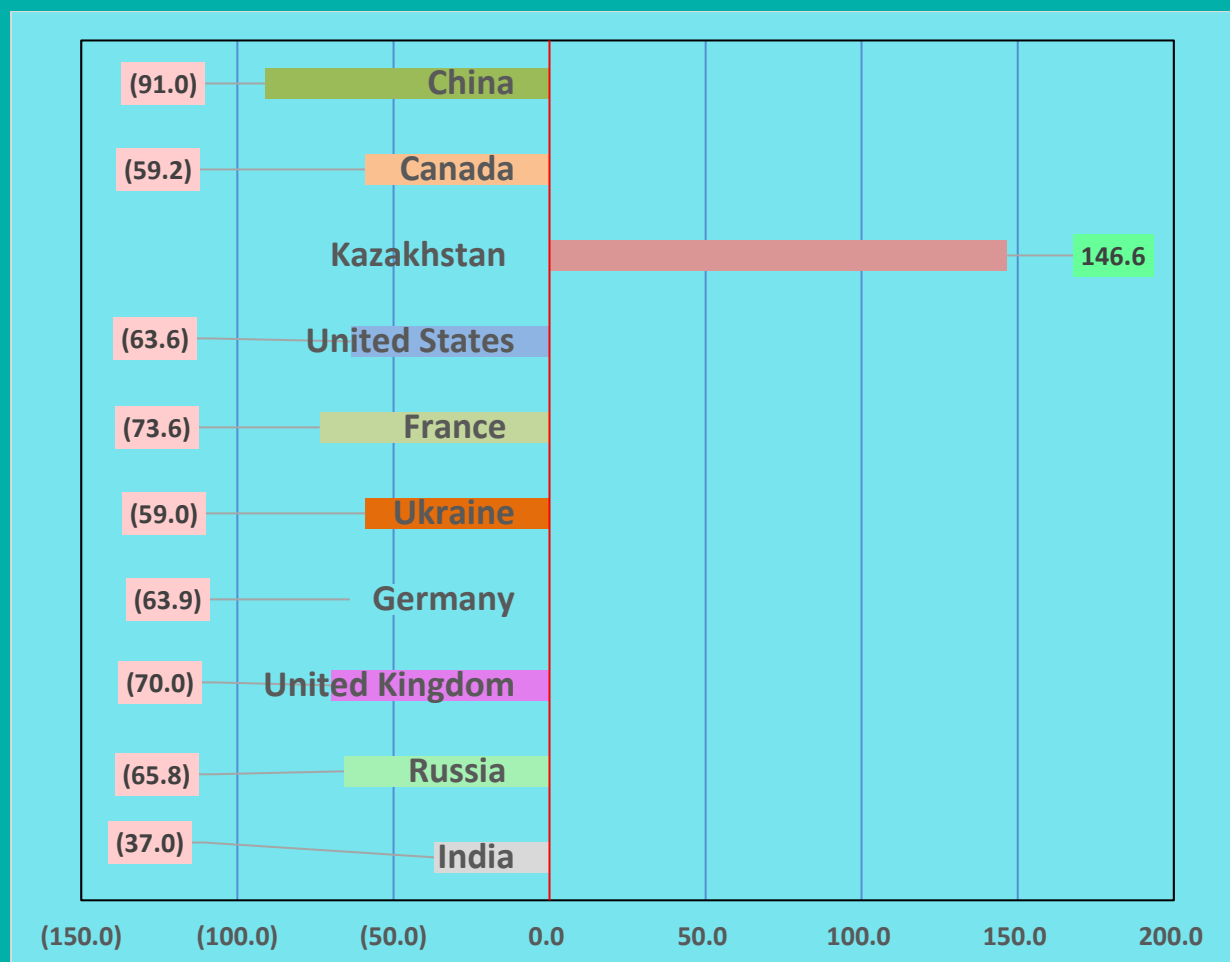


Chart 3. Top ten source markets, percentage changes, January– December 2021 & January– December 2020





International tourist arrivals by country of residence

	December-21			Total Tourist Arrivals December 2020	% Change December (20/21)	Total Tourist Arrivals up to December 2021	Total Tourist Arrivals up to December 2020	% Change up to December (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
AMERICAS	4,870	0	4,870	0	-	11,759	31,843	(63.1)
North America	4,630	0	4,630	0	-	11,281	29,627	(61.9)
Canada	1,705	0	1,705	0	-	5,079	12,436	(59.2)
Mexico	41	0	41	0	-	78	349	(77.7)
United States	2,884	0	2,884	0	-	6,124	16,842	(63.6)
Carribean & Central America	37	0	37	0	-	104	226	(54.0)
Costa Rica	7	0	7	0	-	8	33	(75.8)
Jamaica	5	0	5	0	-	9	25	(64.0)
Others	25	0	25	0	-	87	168	(48.2)
South America	203	0	203	0	-	374	1,990	(81.2)
Argentina	26	0	26	0	-	50	416	(88.0)
Brazil	98	0	98	0	-	159	875	(81.8)
Chile	15	0	15	0	-	23	271	(91.5)
Colombia	37	0	37	0	-	74	201	(63.2)
Others	27	0	27	0	-	68	227	(70.0)
AFRICA	409	0	409	0	-	862	2,880	(70.1)
North Africa	196	0	196	0	-	293	689	(57.5)
Morocco	51	0	51	0	-	85	311	(72.7)
Sudan	69	0	69	0	-	97	143	(32.2)
Others	76	0	76	0	-	111	235	(52.8)
Sub-Saharan Africa	213	0	213	0	-	569	2,191	(74.0)
Kenya	21	0	21	0	-	39	110	(64.5)
Mauritius	13	0	13	0	-	23	170	(86.5)
Nigeria	7	0	7	0	-	11	25	(56.0)
South Africa	109	0	109	0	-	272	1,364	(80.1)
Others	63	0	63	0	-	224	522	(57.1)



	December-21			Total Tourist Arrivals December 2020	% Change December (20/21)	Total Tourist Arrivals up to December 2021	Total Tourist Arrivals up to December 2020	% Change up to December (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	33,268	0	33,268	0	-	83,926	181,154	(53.7)
North East Asia	560	0	560	0	-	3,244	37,320	(91.5)
China	258	0	258	0	-	2,417	26,147	(91.3)
Japan	159	0	159	0	-	392	6,644	(94.1)
South Korea	120	0	120	0	-	389	2,499	(84.4)
Taiwan	19	0	19	0	-	42	1,985	(97.9)
Others	4	0	4	0	-	4	45	(91.1)
South East Asia	999	0	999	0	-	3,617	14,927	(75.8)
Cambodia	7	0	7	0	-	14	372	(96.2)
Indonesia	188	0	188	0	-	1,856	1,114	66.6
Malaysia	158	0	158	0	-	323	3,494	(90.8)
Myanmar	9	0	9	0	-	39	532	(92.7)
Philippines	178	0	178	0	-	529	4,249	(87.6)
Singapore	306	0	306	0	-	557	2,545	(78.1)
Thailand	129	0	129	0	-	247	1,880	(86.9)
Vietnam	24	0	24	0	-	52	709	(92.7)
Others	0	0	0	0	-	0	32	(100.0)
Oceania	3,303	0	3,303	0	-	4,767	22,706	(79.0)
Australia	3,129	0	3,129	0	-	4,421	20,283	(78.2)
New Zealand	167	0	167	0	-	325	2,324	(86.0)
Others	7	0	7	0	-	21	99	(78.8)
South Asia	28,406	0	28,406	0	-	72,298	106,201	(31.9)
Afghanistan	5	0	5	0	-	15	146	(89.7)
Bangladesh	544	0	544	0	-	1,496	1,986	(24.7)
Bhutan	1	0	1	0	-	5	208	(97.6)
India	23,566	0	23,566	0	-	56,268	89,357	(37.0)
Iran	181	0	181	0	-	397	648	(38.7)
Maldives	2,896	0	2,896	0	-	6,272	9,407	(33.3)
Nepal	209	0	209	0	-	325	1,384	(76.5)
Pakistan	1,004	0	1,004	0	-	7,520	3,065	145.4
EUROPE	48,704	0	48,704	0	-	93,495	281,596	(67.0)
Northern Europe	11,210	0	11,210	0	-	21,632	75,146	(71.2)
Denmark	656	0	656	0	-	1,302	4,905	(73.5)
Finland	195	0	195	0	-	341	2,298	(85.2)
Norway	447	0	447	0	-	1,141	3,019	(62.2)
Sweden	1,070	0	1,070	0	-	1,601	7,061	(77.3)
United Kingdom	8,493	0	8,493	0	-	16,646	55,455	(70.0)
Others	349	0	349	0	-	601	2,408	(75.0)



	December-21			Total Tourist Arrivals December 2020	% Change December (20/21)	Total Tourist Arrivals up to December 2021	Total Tourist Arrivals up to December 2020	% Change up to December (20/21)
	By Air	By Sea	Total					
Western Europe	12,783	0	12,783	0	-	27,269	82,229	(66.8)
Austria	827	0	827	0	-	1,502	4,300	(65.1)
Belgium	639	0	639	0	-	1,283	3,371	(61.9)
France	3,021	0	3,021	0	-	6,549	24,838	(73.6)
Germany	5,875	0	5,875	0	-	12,442	34,507	(63.9)
Netherlands	1,144	0	1,144	0	-	2,422	8,656	(72.0)
Switzerland	1,225	0	1,225	0	-	2,974	6,389	(53.5)
Others	52	0	52	0	-	97	168	(42.3)
Central/ Eastern Europe	21,915	0	21,915	0	-	38,129	100,766	(62.2)
Belarus	359	0	359	0	-	616	2,638	(76.6)
Czech Republic	1,087	0	1,087	0	-	1,864	7,599	(75.5)
Estonia	260	0	260	0	-	376	1,185	(68.3)
Hungary	322	0	322	0	-	445	1,588	(72.0)
Kazakhstan	2,462	0	2,462	0	-	5,754	2,333	146.6
Lithuania	155	0	155	0	-	383	1,054	(63.7)
Poland	1,379	0	1,379	0	-	2,110	11,908	(82.3)
Romania	581	0	581	0	-	820	1,724	(52.4)
Russia	10,793	0	10,793	0	-	16,894	49,397	(65.8)
Slovakia	311	0	311	0	-	664	1,513	(56.1)
Ukraine	3,562	0	3,562	393	806.7	7,037	17,169	(59.0)
Others	644	0	644	0	-	1,166	2,658	(56.1)
Southern/ Mediterranean Europe	2,796	0	2,796	0	-	6,466	23,455	(72.4)
Greece	159	0	159	0	-	249	1,573	(84.2)
Italy	556	0	556	0	-	1,309	8,603	(84.8)
Portugal	134	0	134	0	-	372	1,602	(76.8)
Spain	894	0	894	0	-	2,015	3,385	(40.5)
Turkey	141	0	141	0	-	309	2,121	(85.4)
Israel	684	0	684	0	-	1,724	3,556	(51.5)
Others	228	0	228	0	-	488	2,615	(81.3)
MIDDLE EAST	2,255	0	2,255	0	-	4,452	10,231	(56.5)
Bahrain	81	0	81	0	-	128	549	(76.7)
Egypt	268	0	268	0	-	400	956	(58.2)
Iraq	115	0	115	0	-	262	138	89.9
Jordan	323	0	323	0	-	682	627	8.8
Kuwait	98	0	98	0	-	166	825	(79.9)
Lebanon	252	0	252	0	-	547	483	13.3
Oman	132	0	132	0	-	246	1,045	(76.5)
Qatar	12	0	12	0	-	34	129	(73.6)
Saudi Arabia	741	0	741	0	-	1,596	4,755	(66.4)
United Arab Emirates	169	0	169	0	-	254	352	(27.8)
Others	64	0	64	0	-	137	372	(63.2)
TOTAL	89,506	0	89,506	0	-	194,495	507,704	(61.7)



Main last departure airports and airlines to Sri Lanka, December 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, Chennai, Dubai, Doha. Further, in terms of airlines, Sri Lankan Airlines, IndiGo, Qatar Airways and Emirates were the top airlines, handling 69% of tourists to Sri Lanka.

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

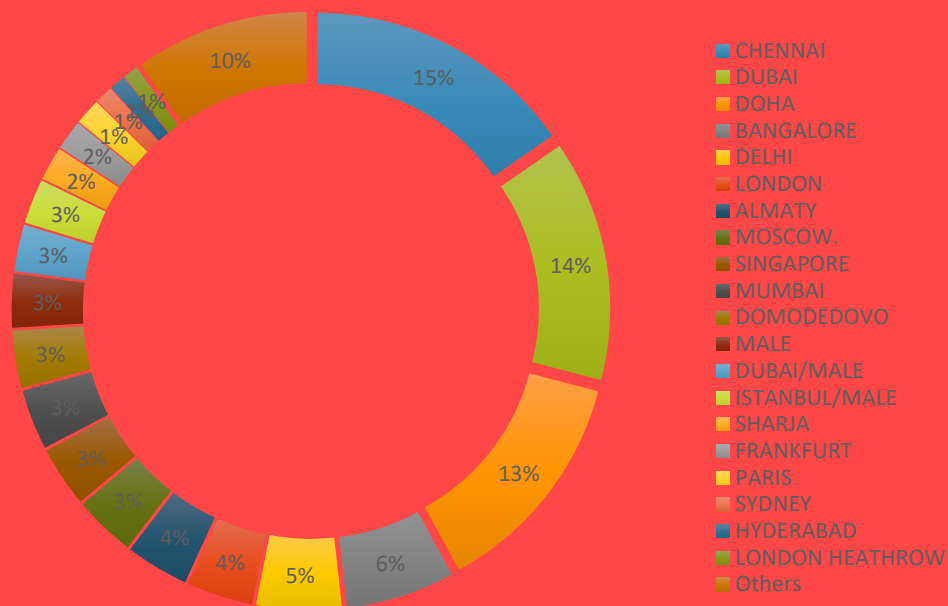
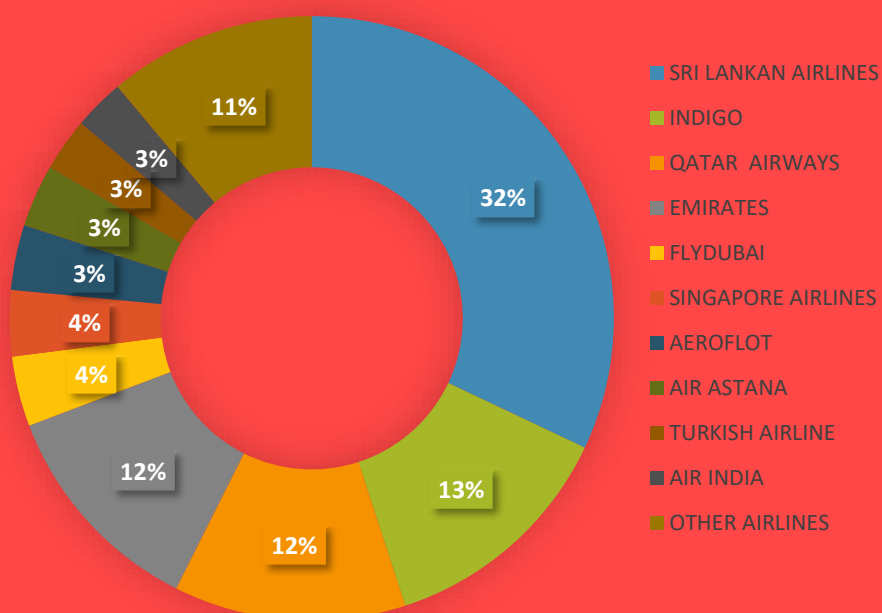


Chart 5. Main airlines to Sri Lanka, December 2021





Top ten markets versus main last departure airports and main airlines to Sri Lanka, December 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 Sri Lankan Airlines to Paris from November, the percentage share of the passengers using Sri Lankan Airlines in comparison to November 2021, has increased. Further, it is noteworthy that 10.2% 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 21.1% of tourists from Russia. Sri Lankan Airlines and IndoGo are the most preferred airlines for Indians in travelling to Sri Lanka. Further it is noteworthy that 86% of tourists from Kazakhstan has used Air Astana in travelling to Sri Lanka.

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

Top Ten Markets	Number of Passengers																				
	Chennai	Dubai	Doha	Bangalore	Delhi	London	Almaty	Moscow	Singapore	Mumbai	Domodedovo	Male	Dubai/Male	Istanbul/Male	Sharjah	Frankfurt	Paris	Sydney	Hyderabad	London Heathrow	Others
India	9,917	555	89	3,856	2,994	96	3	3	420	2,144	-	64	108	10	37	19	7	276	558	11	2,351
Russia	16	3,561	1,061	2	10	56	66	2,282	6	2	2,147	78	344	153	682	6	3	-	-	51	265
United Kingdom	53	1,656	2,612	41	48	2,086	4	-	107	51	-	95	248	56	5	6	46	1	8	476	885
Germany	16	1,552	1,995	22	8	32	4	10	21	4	2	31	195	71	4	1,042	60	-	-	6	799
Ukraine	9	209	906	4	1	6	14	10	2	-	3	9	6	1,262	516	3	3	-	-	-	599
Australia	58	101	51	37	46	16	1	1	1,552	31	-	12	3	7	-	1	7	402	14	3	649
France	27	462	1,006	20	19	58	2	2	16	6	-	20	62	47	3	43	832	-	1	12	379
Maldives	2	284	9	1	2	34	-	-	1	-	-	1,616	677	2	-	-	1	-	1	-	266
United States	106	623	902	120	86	115	22	10	164	36	-	69	112	72	2	12	24	-	28	17	349
Kazakhstan	7	94	5	8	-	1	2,266	5	-	-	5	26	2	1	19	-	2	-	-	-	21



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

Top Ten Markets	Percentage share of the airline																				
	Sri Lankan Airlines	IndiGo	Qatar Airways	Emirates	Fly Dubai	Singapore Airlines	Aeroflot	Air Astana	Turkish Airlines	Air India	Vistara	SpiceJet	Air Arabia	Air France	LOT Polish	Gulf Air	Air Asia	Etihad	Malaysian Air Lines	Other Airlines	Total
India	38.5	35.2	0.4	1.8	0.4	1.8	0	0	0.1	7.4	7	7	0.2	0	0	0.1	0	0	0.3	0.3	23,566
Russian Federation	23.4	0.1	9.8	20.8	14.1	0.1	21.1	0.6	1.6	0.1	0	0	6.3	0.1	0.3	1.1	0	0	0	0.1	10,793
United Kingdom	39.8	0.6	30.2	19.3	2.5	1.2	0	0	0.9	0.1	0	0	0.1	0.4	1.1	2.1	0	1	0.2	0.8	8,493
Germany	22.7	0.4	32.5	24.6	4.9	0.4	0.2	0.1	1.5	0.1	0	0	0.1	2.8	3.5	0.9	0	3	0.1	2.9	5,875
Ukraine	2.6	0.1	25.3	1.2	3.7	0.1	0.3	0.4	39.1	0.2	0	0	15	0.1	1.8	0.1	10	0	0	0.2	3,562
Australia	37.4	1.2	1.6	2.7	0.2	51.5	0	0	0.3	0.3	0	0	0	0	0.1	0	0	1	3.8	0.2	3,129
France	37.9	1	27.3	12.5	4.3	0.6	0.1	0.1	1.7	0.4	0	0	0.1	10.2	0.9	0.4	0	1	0.3	1.6	3,021
Maldives	66.1	0	1.1	32.5	0.1	0	0	0	0.1	0	0	0	0	0	0	0	0	0	0	0	2,896
United States	23.3	5.7	29.3	22.5	2.4	5.8	0.3	0.8	3.2	0.7	1	0	0.1	0.9	0.6	0.3	0	2	0.1	0.9	2,884
Kazakhstan	2.9	0.5	0.2	1	1.9	0	0.2	85.9	0	0	0	0	0.8	0.2	0	0	0	0	0	6.1	2,462

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