

Monthly Tourist Arrivals Report:

May 2023

Sri Lanka Tourism Development Authority

Introduction

The following document provides a synthesis of the most recent May, 2023 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st May 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 May 2023, Sri Lanka experienced a significant increase in international tourist arrivals compared to the same period in 2022. The number of foreign tourist arrivals rose by 175.8% year-on-year, reaching 83,309 visitors. This impressive growth brought the total number of tourists to 64% of pre-pandemic levels in 2018. However, compared to April 2023, there has been a decrease of 21% in tourist arrivals, indicating the end of the peak season in Sri Lanka.

According to UNWTO international tourism is set to sustain its recovery throughout the year, benefiting from strong pent-up demand, continuous enhancement of air connectivity, and China's recent reopening. The top countries of origin for tourists in May were India, Russian Federation, Germany, the United Kingdom and Australia.

Table 1. Monthly tourist arrivals, May 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		
July	47,293		
August	37,760		
September	29,802		
October	42,026		
November	59,759		
December	91,961		
TOTAL	719,978	524,486	



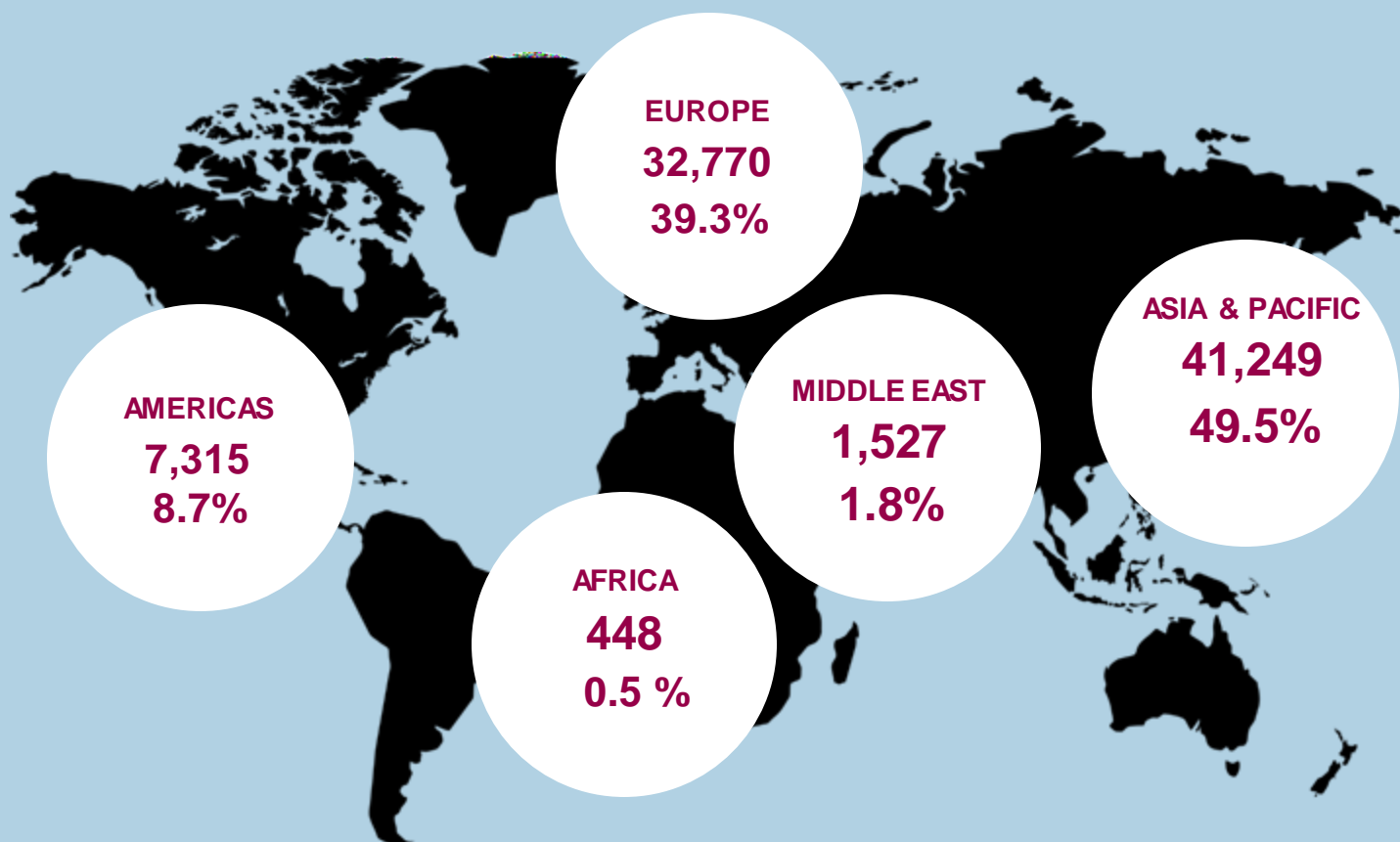
Tourist Arrivals | May 2023

83,309



Tourist arrivals by region and percentage share May 2023

Map 1. Tourist arrivals by region and percentage share



Europe accounted for the majority of tourists visiting Sri Lanka, representing 39.3% of total arrivals. The increase in tourism is believed to be a result of growing demand from countries such as the Russian Federation, United Kingdom and Germany.

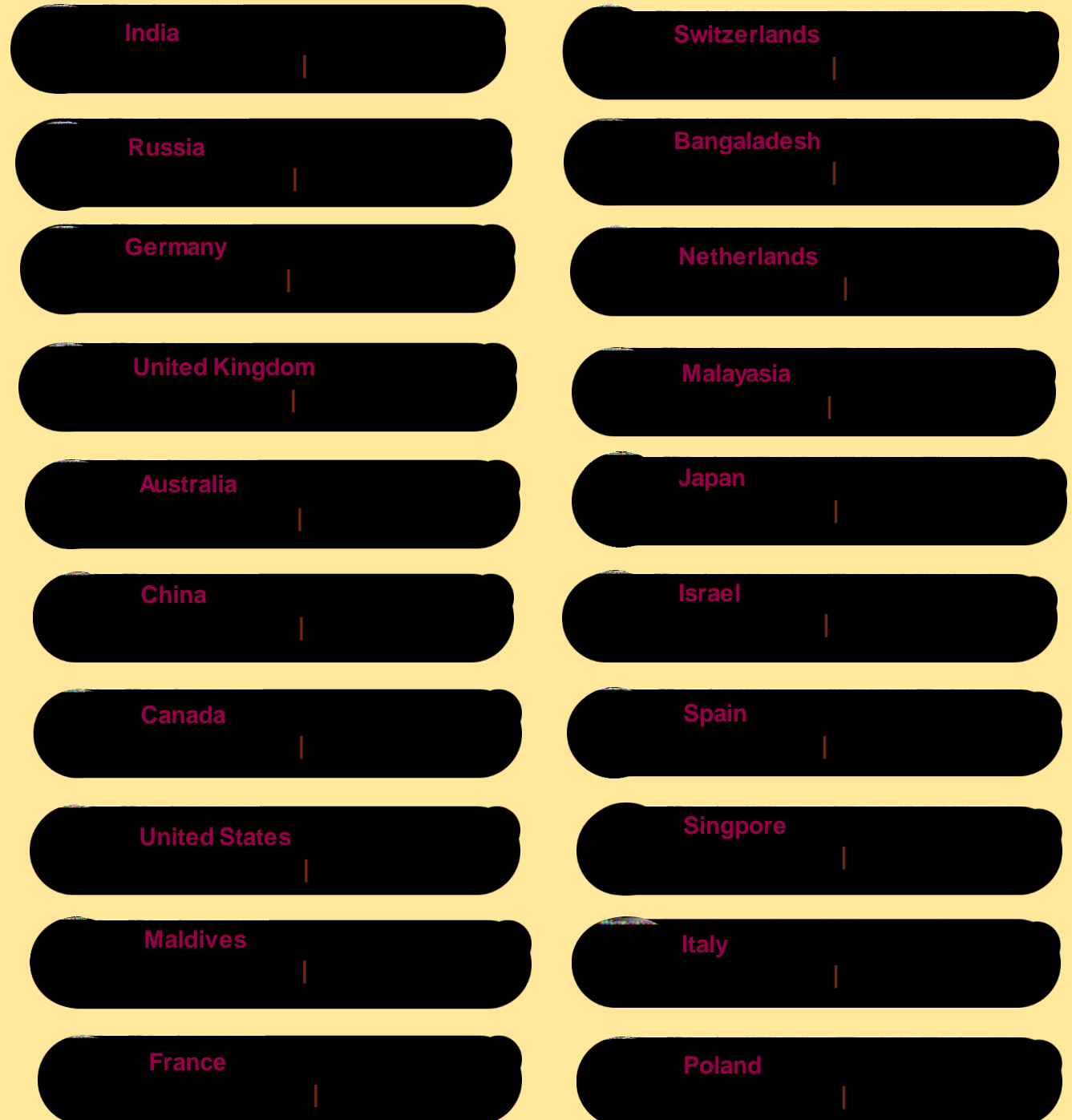
The Asia and Pacific region accounted for 49.5% of total tourist arrivals to Sri Lanka, while the Americas and the Middle East contributed 8.7% and 1.8% respectively. The easing of travel restrictions and enhanced air connectivity to Sri Lanka could be the key drivers behind the growth in tourism during this period.

According to UNWTO, international tourism is expected to continue its recovery throughout the year. Despite the positive outlook for the recovery of international tourism, its progress is being impeded primarily by the difficult economic circumstances. Factors such as high inflation and rising oil prices have led to increased costs for transportation and accommodations. As a result, tourists are anticipated to seek better value for their money and opt for travel destinations closer to home. These trends are driven by the elevated prices and overall economic difficulties.



Top primary markets and top potential markets

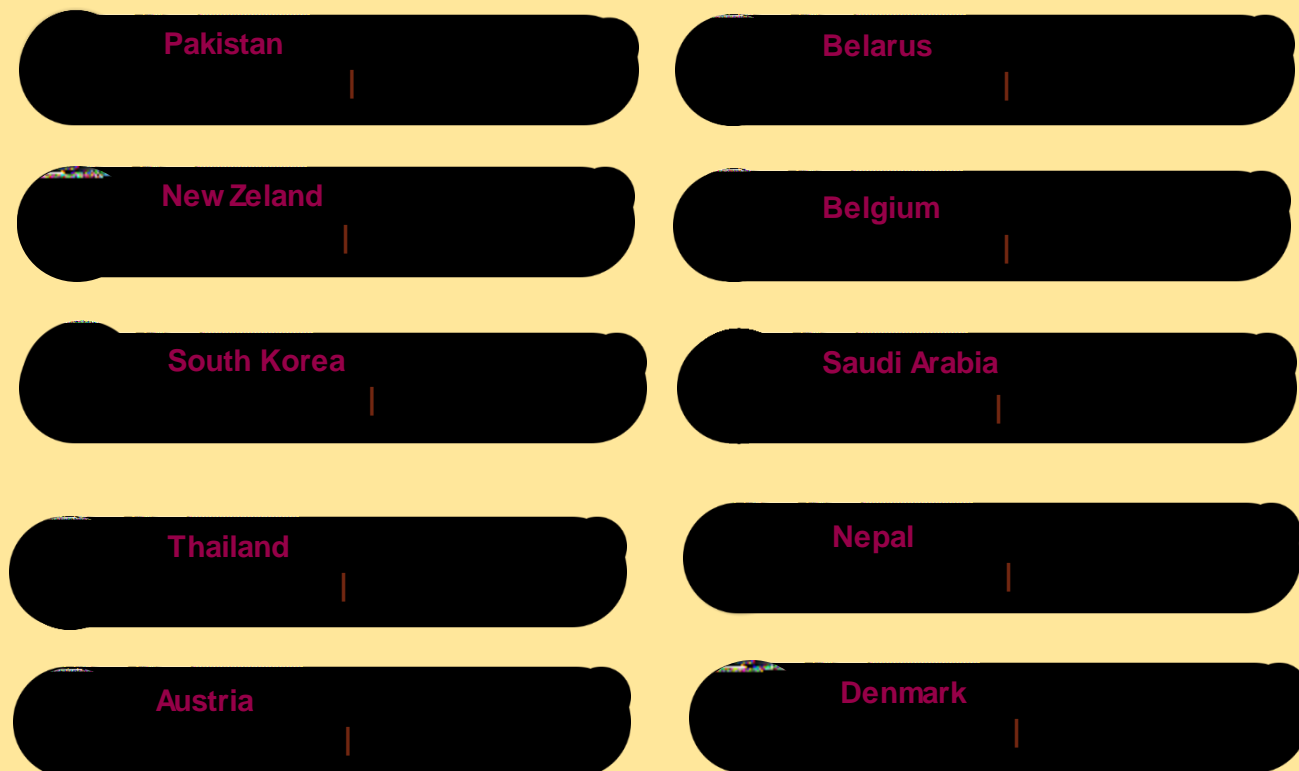
Top primary markets – May 2023



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 - May 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

May 2023

During May, the top source markets to Sri Lanka were India, the Russian Federation, Germany, the United Kingdom, and Australia. India accounted for the highest percentage of arrivals at 28%, while the Russian Federation, Germany, United Kingdom, and Australia represented 9%, 8%, 7%, and 5% respectively. These trends indicate changes in outbound travel preferences and travel patterns, with growth in arrivals from India and Russia 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 Russia 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 China, India, Germany, Australia, and the Russian Federation have shown substantial growth in arrivals, the United Kingdom and Canada have exhibited lowest growth rates compared to May 2022, possibly due to emerging trends and responses to global and local conditions.

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

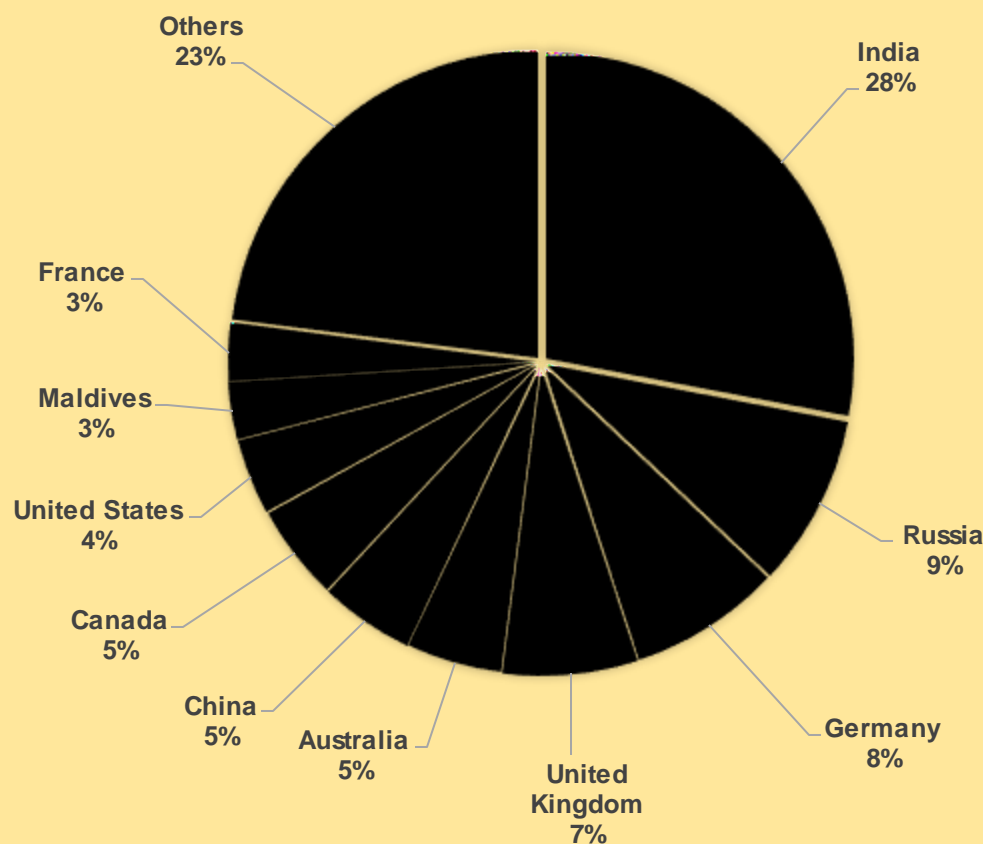
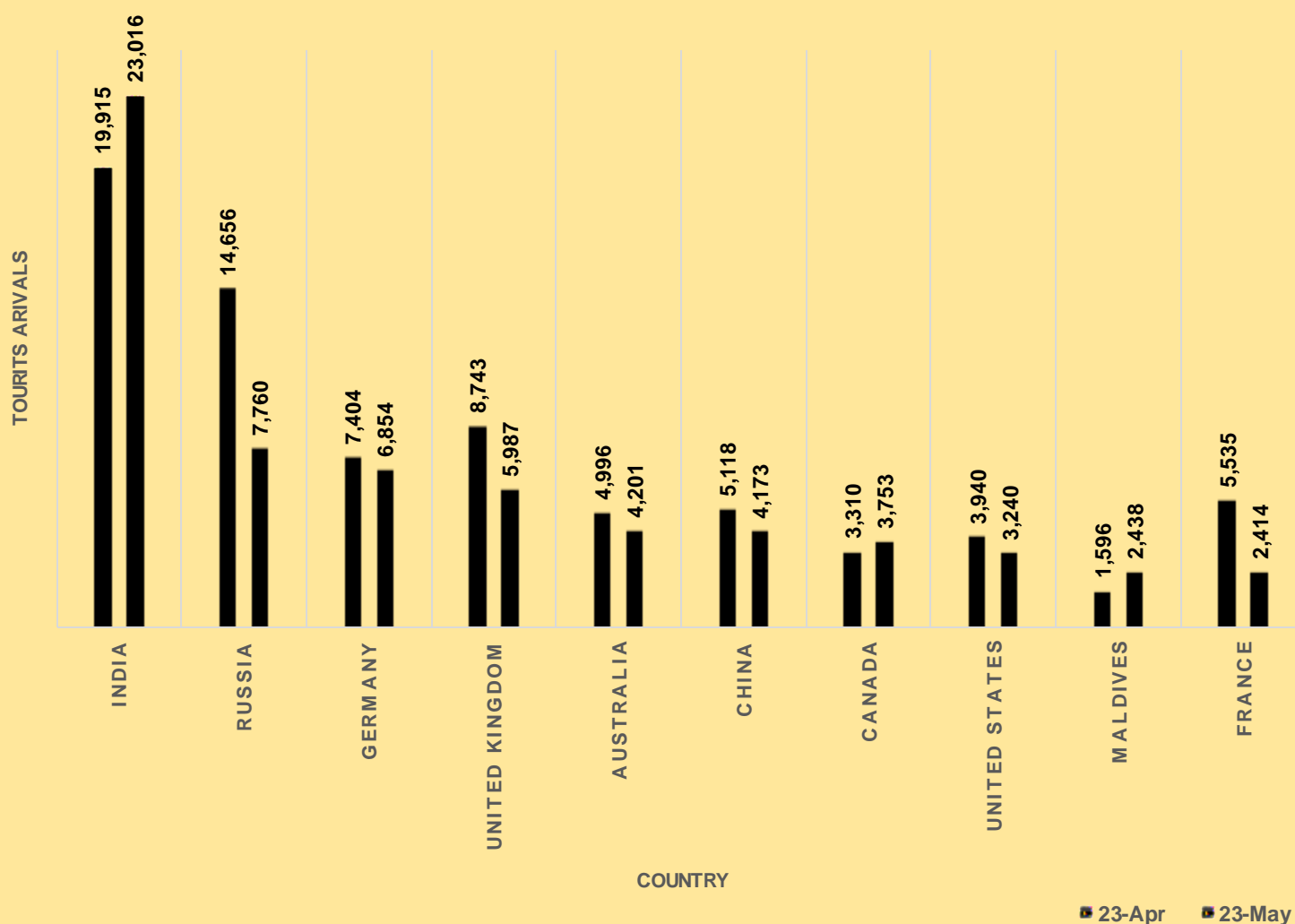




Table 2. Top ten source markets to Sri Lanka, May 2023

Rank	Country of Residence	Tourist Arrivals (May 2023)			Tourist Arrivals (May 2022)
		By Air	By Sea	Total	
1	India	23,008	08	23,016	5,562
2	Russian Federation	7,758	02	7,760	3,202
3	Germany	4,529	2,325	6,854	2,208
4	United Kingdom	5,866	121	5,987	3,723
5	Australia	3,774	427	4,201	1,660
6	China	4,172	01	4,173	242
7	Canada	3,561	192	3,753	2,013
8	United States	2,465	775	3,240	1,368
9	Maldives	2,438	0	2,438	849
10	France	2,396	18	2,414	1,076

Chart 2. Comparison of arrivals from top ten markets to Sri Lanka, April / May – 2023





Top ten source markets

January to May 2023

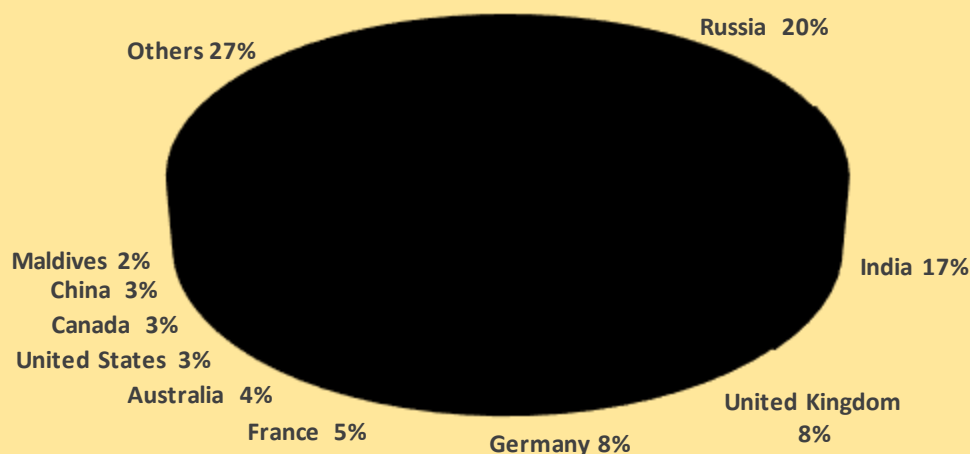
During the period from January to May 2023, Sri Lanka experienced changes in its international tourist arrivals compared to the same period in 2022. The main sources of international tourists for Sri Lanka during this time were the Russian Federation, India, the United Kingdom, Germany, and France. However,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

On the other hand, it's important to highlight that the number of tourists from the United Kingdom decreased by 7.3% during the January to May 2023 period, as opposed to the same period in 2022.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ May 2023)	Tourist Arrivals (Jan ~ May 2022)
1	Russian Federation	102,307	44,793
2	India	89,363	61,951
3	United Kingdom	42,841	46,254
4	Germany	40,107	30,976
5	France	24,693	20,167
6	Australia	20,703	12,029
7	United States	17,960	10,038
8	Canada	17,917	10,709
9	China	14,757	1,353
10	Maldives	9,829	7,259
10	Others	144,009	132,992
Total		524,486	378,521

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







Tourist arrivals by purpose of visit

May 2023

According to the analysis conducted on the purpose of visits by tourists to Sri Lanka, the results indicate that the majority of tourists, accounting for 55%, visited the country for pleasure or vacation. This signifies that Sri Lanka is a popular destination for leisure travelers seeking a relaxing and enjoyable experience. In terms of visiting friends and relatives, 18% of tourists traveled to Sri Lanka for this purpose. This suggests that the country attracts a significant number of visitors who have personal connections or a desire to reconnect with loved ones residing in Sri Lanka. Business-related reasons accounted for only 6% of tourist visits. Furthermore, 5% of tourists visited for MICE purposes, with a small percentage of 0.6% and 0.3% visiting for health/Ayurvedic and sports-related reasons, respectively.

Among the top source markets such as India, Russia, Germany, China, France and USA the primary reason for visiting Sri Lanka was for pleasure or vacation, accounting for the majority of visits. Specifically, Indian tourists constituted 65%, Russian tourists 41.6%, German tourists 73.1%, Chinese tourists 82.7%, US tourists 49.4% and French tourists 52.6%, who visited for this purpose.

Canadian tourists (72.9%) and British tourists (48.2%), 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 19.9% of Canadian tourists and 37.3% of Australian tourists came for pleasure/vacation purposes. On the other hand, more or less similar proportions of tourists from Australia and Maldives had visited Sri Lanka for pleasure and VFR purposes.

Furthermore, a fraction of Indian tourists, 13%, and 6% of Indian tourists visited Sri Lanka for business-related purposes and MICE purposes, respectively. 4% of German tourists had visited Sri Lanka for health purposes.

Chart 4: Purpose of visit

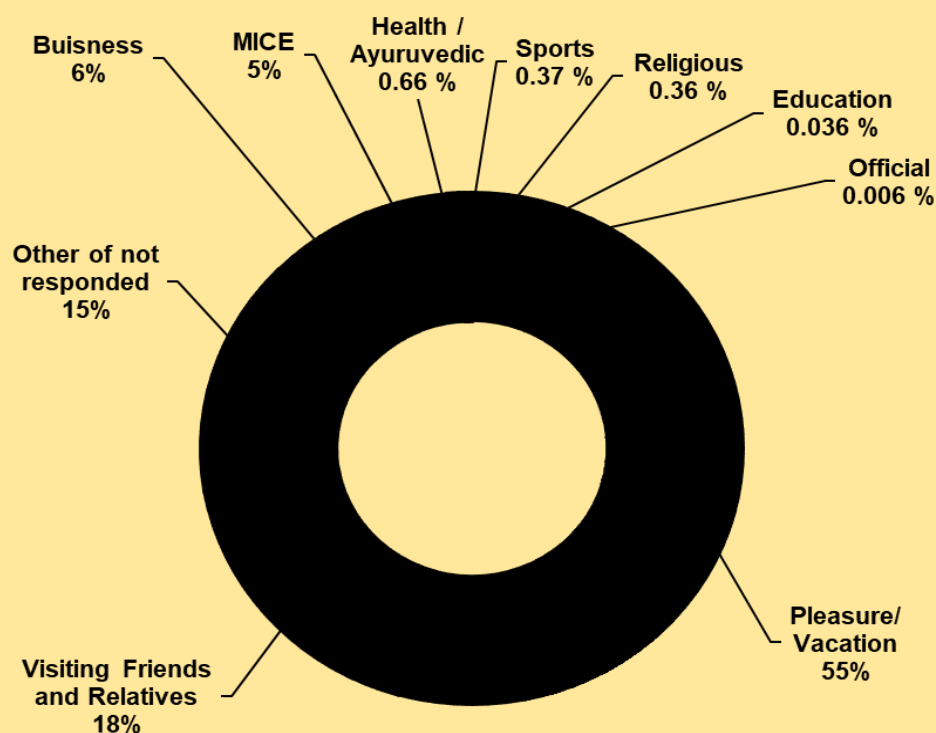
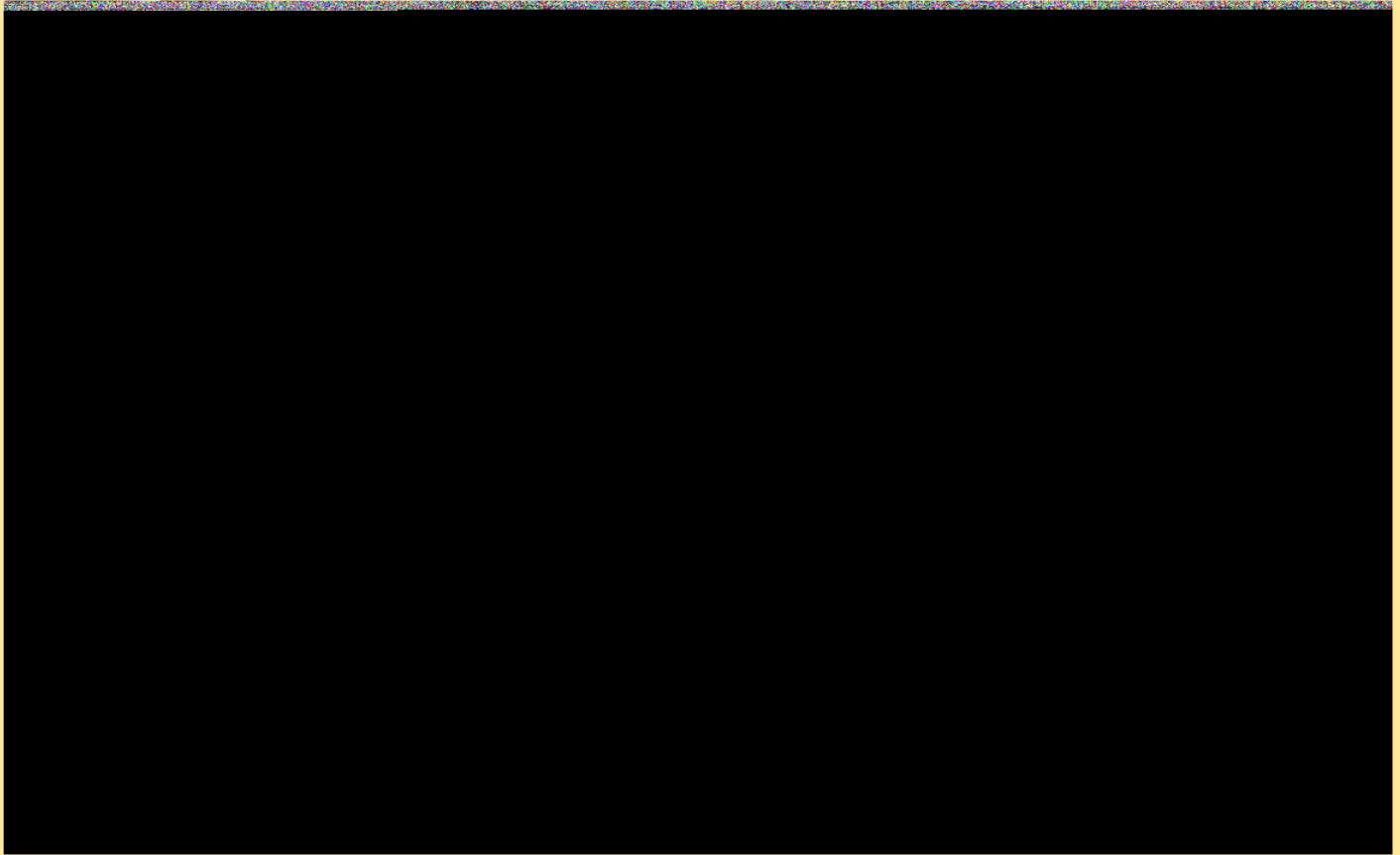




Chart 5 : Purpose of visit vs main source markets





International tourist arrivals by country of residence

	May 2023			Tourist Arrivals May 2022	% Change May (23/22) 2023	Total Tourist Arrivals up to May 2023	Total Tourist Arrivals up to May 2022	% Change up to May (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
AMERICAS	6,309	1,006	7,315	3,541	106.58	37,922	21,996	72.40
North America	6,053	986	7,039	3,399	107.09	36,144	20,897	72.96
Canada	3,561	192	3,753	2,013	86.44	17,917	10,709	67.31
Mexico	27	19	46	18	155.56	267	150	78.00
United States	2,465	775	3,240	1,368	136.84	17,960	10,038	78.92
Carribean & Central America	42	0	42	13	223.08	268	161	66.46
Costa Rica	03	0	03	1	200.00	15	28	(46.43)
Jamaica	03	0	03	0	-	21	8	162.50
Others	36	0	36	12	200.00	232	125	85.60
South America	214	20	234	129	81.40	1,510	938	60.98
Argentina	60	06	66	14	-	350	133	163.16
Brazil	71	03	74	42	76.19	578	361	60.11
Chile	24	09	33	16	106.25	176	101	74.26
Colombia	32	01	33	37	(10.81)	209	186	12.37
Others	27	01	28	20	40.00	197	157	25.48
AFRICA	442	6	448	318	40.88	2,708	2,523	7.33
North Africa	128	0	128	160	(20.00)	851	1,089	(21.85)
Morocco	40	0	40	44	(9.09)	248	247	0.40
Sudan	39	0	39	63	(38.10)	233	532	(56.20)
Others	49	0	49	53	(7.55)	370	310	19.35
Sub-Saharan Africa	314	6	320	158	102.53	1,857	1,434	29.50
Kenya	24	0	24	12	100.00	190	112	69.64
Mauritius	25	0	25	7	-	113	49	130.61
Nigeria	04	0	04	0	-	22	16	37.50
South Africa	140	05	145	64	126.56	991	845	17.28
Others	121	01	122	75	62.67	541	412	31.31



	May 2023			Tourist Arrivals May 2022	% Change May (23/22)	Total Tourist Arrivals up to May 2023	Total Tourist Arrivals up to May 2022	% Change up to May (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	40,764	485	41,249	10,069	309.66	172,412	98,040	75.86
North East Asia	5,754	6	5,760	475	-	24,194	2,971	714.34
China	4,172	01	4,173	242	-	14,757	1,353	-
Japan	872	04	876	158	-	5,954	847	-
South Korea	497	01	498	63	-	2,404	635	-
Taiwan	211	0	211	11	-	1,036	98	-
Others	02	0	02	1	-	43	38	13.16
South East Asia	2,888	1	2,889	735	293.06	11,493	4,774	140.74
Cambodia	75	0	75	6	-	222	55	303.64
Indonesia	142	0	142	72	97.22	761	396	92.17
Malaysia	895	0	895	153	-	3,459	1,020	239.12
Myanmar	90	0	90	16	-	278	116	139.66
Philippines	299	01	300	160	87.50	1,448	928	56.03
Singapore	691	0	691	209	-	2,727	1,499	81.92
Thailand	455	0	455	84	-	1,658	521	218.23
Vietnam	233	0	233	34	-	878	220	299.09
Others	08	0	08	1	-	62	19	226.32
Oceania	4,286	470	4,756	1,842	158.20	23,224	13,048	77.99
Australia	3,774	427	4,201	1,660	153.07	20,703	12,029	72.11
New Zealand	497	43	540	181	198.34	2,450	999	145.25
Others	15	0	15	1	-	71	20	255.00
South Asia	27,836	8	27,844	7,017	296.81	113,501	77,247	46.93
Afghanistan	24	0	24	1	-	37	19	94.74
Bangladesh	1,145	0	1,145	249	-	3,965	1,416	180.01
Bhutan	21	0	21	1	-	121	50	142.00
India	23,008	08	23,016	5,562	313.81	89,363	61,951	44.25
Iran	259	0	259	102	153.92	5,643	3,127	80.46
Maldives	2,438	0	2,438	849	187.16	9,829	7,259	35.40
Nepal	361	0	361	39	-	1,421	516	175.39
Pakistan	580	0	580	214	171.03	3,122	2,909	7.32
EUROPE	30,036	2,734	32,770	14,745	122.24	302,243	245,564	23.08
Northern Europe	7,132	129	7,261	4,554	59.44	55,504	59,912	(7.36)
Denmark	347	01	348	295	17.97	4,161	5,019	(17.10)
Finland	93	0	93	45	106.67	850	964	(11.83)
Norway	343	01	344	192	79.17	2,744	2,663	3.04
Sweden	287	0	287	104	175.96	3,134	2,794	12.17
United Kingdom	5,866	121	5,987	3,723	60.81	42,841	46,254	(7.38)
Others	196	06	202	195	3.59	1,774	2,218	(20.02)



	May 2023			Tourist Arrivals May 2022	% Change May (23/22)	Total Tourist Arrivals up to May 2023	Total Tourist Arrivals up to May 2022	% Change up to May (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
Western Europe	9,892	2,559	12,451	4,747	162.29	87,863	69,725	26.01
Austria	358	82	440	189	132.80	3,851	3,493	10.25
Belgium	412	08	420	212	98.11	3,149	2,934	7.33
France	2,396	18	2,414	1,076	124.35	24,693	20,167	22.44
Germany	4,529	2,325	6,854	2,208	210.42	40,107	30,976	29.48
Netherlands	1,046	26	1,072	483	121.95	7,237	5,853	23.65
Switzerland	1,115	93	1,208	570	111.93	8,540	6,141	39.07
Others	36	07	43	9	377.78	286	161	77.64
Central/ Eastern Europe	10,113	23	10,136	4,062	149.53	133,655	99,895	33.80
Belarus	427	01	428	68	-	4,902	2,271	115.85
Czech Republic	258	01	259	83	212.05	4,532	5,800	(21.86)
Estonia	35	0	35	12	191.67	667	756	(11.77)
Hungary	70	02	72	33	118.18	1,469	1,685	(12.82)
Kazakhstan	74	01	75	28	167.86	2,004	7,610	(73.67)
Lithuania	58	01	59	50	18.00	1,216	1,569	(22.50)
Poland	609	07	616	203	-	5,639	12,409	(54.56)
Romania	158	05	163	50	-	1,532	2,346	(34.70)
Russia	7,758	02	7,760	3,202	142.35	102,307	44,793	128.40
Slovakia	172	0	172	66	160.61	2,123	1,693	25.40
Ukraine	164	03	167	84	98.81	2,455	13,705	(82.09)
Others	330	0	330	183	80.33	4,809	5,258	(8.54)
Southern/ Mediterranean Europe	2,899	23	2,922	1,382	111.43	25,221	16,032	57.32
Greece	47	01	48	25	92.00	653	500	30.60
Italy	675	05	680	329	106.69	6,222	2,699	130.53
Portugal	155	0	155	64	142.19	1,438	1,063	35.28
Spain	845	12	857	692	23.84	5,228	4,592	13.85
Turkey	141	0	141	66	113.64	1,265	872	45.07
Israel	860	03	863	150	-	8,116	4,679	73.46
Others	176	02	178	56	217.86	2,299	1,627	41.30
MIDDLE EAST	1,527	0	1,527	1,534	(0.46)	9,201	10,398	(11.51)
Bahrain	78	0	78	51	52.94	389	261	49.04
Egypt	164	0	164	211	(22.27)	1,026	1,496	(31.42)
Iraq	58	0	58	120	(51.67)	361	670	(46.12)
Jordan	249	0	249	207	20.29	1,358	1159	17.17
Kuwait	99	0	99	118	(16.10)	772	538	43.49
Lebanon	161	0	161	123	30.89	1,282	868	47.70
Oman	93	0	93	47	97.87	632	386	63.73
Qatar	25	0	25	55	(54.55)	234	134	74.63
Saudi Arabia	372	0	372	365	1.92	2,144	4,015	(46.60)
United Arab Emirates	155	0	155	191	(18.85)	678	599	13.19
Others	73	0	73	46	58.70	325	272	19.49
TOTAL	79,078	4,231	83,309	30,207	175.79	524,486	378,521	38.56

Main last departure airports and airlines to Sri Lanka, May 2023

The significance of air travel for Sri Lanka's tourism industry is evident from the analysis of departure airports and airlines. 38% of tourists departed from airports located in Chennai, Dubai, and Doha, as depicted in Chart 6. Additionally, the top airlines chosen by tourists arriving in Sri Lanka were Sri Lankan Airlines, Emirates, and Qatar Airways, serving a combined total of 55% of the tourist arrivals. It is worth noting that Chennai emerged as the leading departure airport with a share of 15%, while Sri Lankan Airlines dominated the market share among airlines with 35%. These figures indicate the substantial role played by air travel in facilitating tourism to Sri Lanka

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

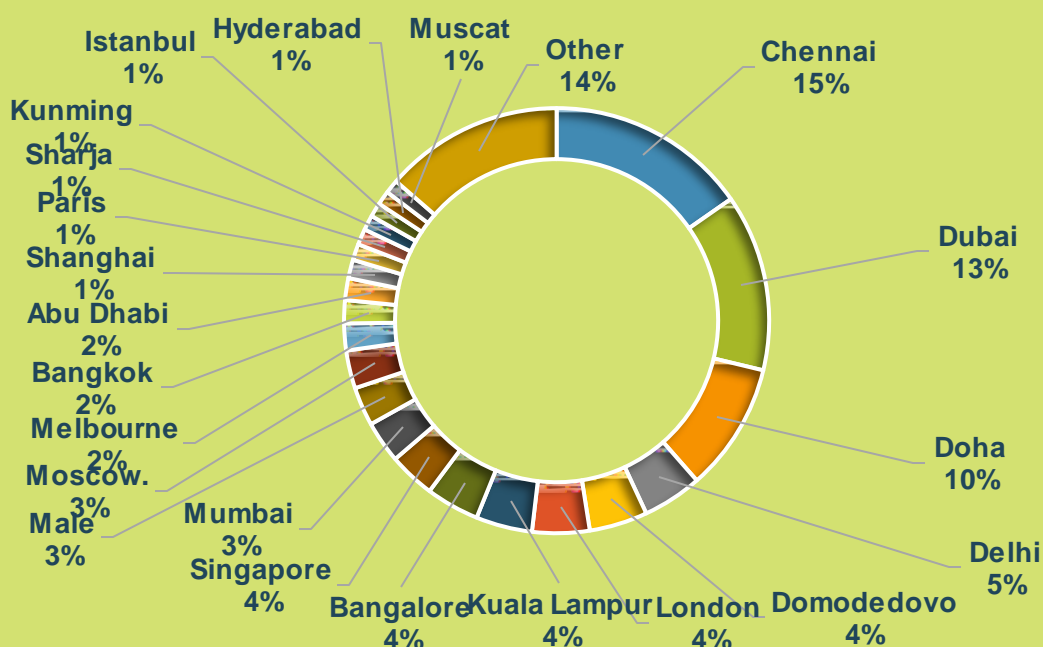
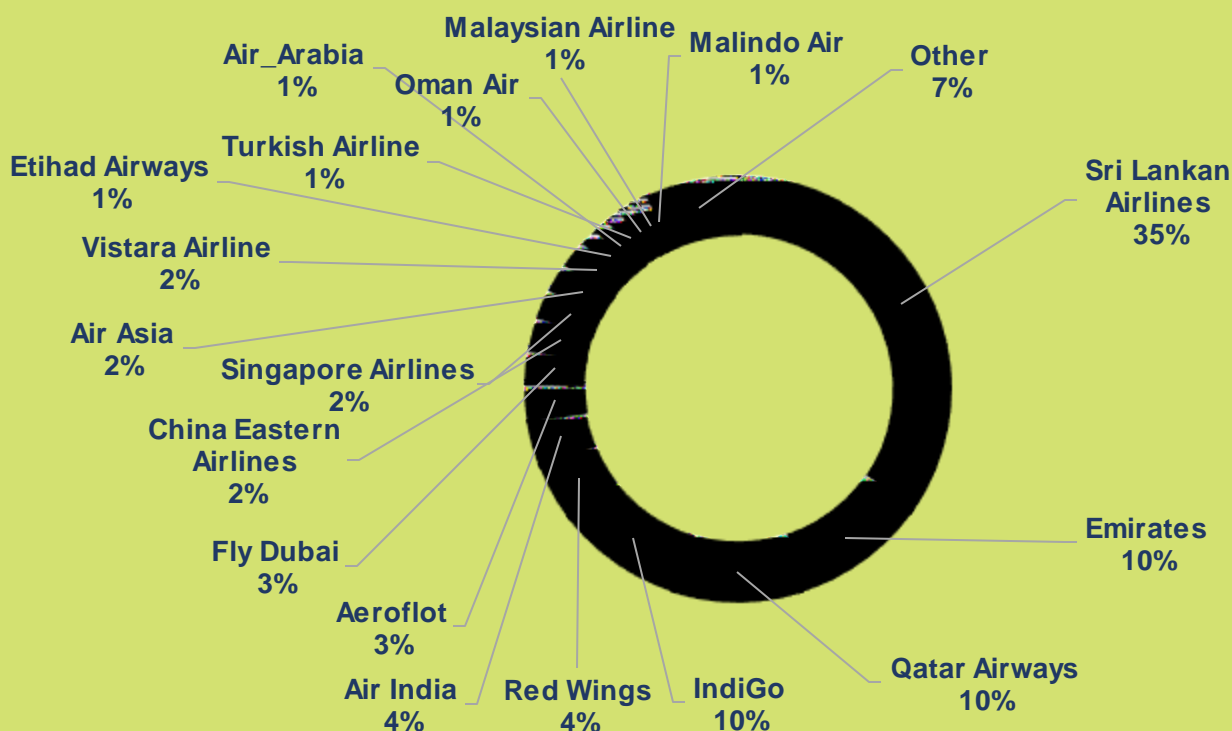


Chart 7. Main airlines to Sri Lanka, May 2023





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

May 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, Russian tourists commonly choose Red Wings and Aeroflot, whereas Indian tourists tend to favour Sri Lankan Airlines and IndiGo. In comparison, Sri Lankan Airlines is a popular choice among tourists from countries like the United Kingdom, France, Australia, the United States, Maldives, and Canada. It is worth noting that German and American tourists 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, May 2023

Country	Chennai	Dubai	Doha	Domodedovo	London	Bangalore	Delhi	Mumbai	Moscow.	Kuala Lumpur	Male	Melbourne	Singapore	Shanghai	Paris	Kunming	Hyderabad	Madurai	Abu Dhabi	Guangzhou	Other	Total
India	11,223	534	108	0	12	2,955	2,720	2,268	0	86	186	6	99	4	1	0	832	618	16	3	1,345	23,016
Russian Federation	113	432	313	3,419	3	27	27	8	2,354	196	49	0	8	2	3	3	1	1	101	1	699	7,760
Germany	107	1,309	1,452	0	63	34	127	37	0	150	56	8	29	0	428	0	0	0	158	2	2,894	6,854
United Kingdom	221	1,346	1,003	0	2,221	39	81	46	3	244	63	28	67	6	0	1	8	1	107	0	502	5,987
Australia	88	88	31	0	52	25	41	13	0	353	36	1,501	864	3	16	0	3	5	12	1	1,069	4,201
China	13	152	18	0	15	3	1	6	0	433	159	2	120	1,134	1	929	0	0	3	593	591	4,173
Canada	265	1,090	700	0	691	86	68	82	0	115	21	5	77	1	194	5	4	9	34	1	305	3,753
United States	205	360	789	0	260	76	75	44	1	103	44	7	148	3	16	1	33	5	101	2	967	3,240
Maldives	13	840	5	0	2	45	15	8	0	65	1,188	0	15	1	0	0	0	2	0	8	231	2,438
France	53	790	553	0	85	16	66	18	1	89	26	3	35	1	286	0	0	0	101	0	291	2,414

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

Country	Sri Lankan Airlines	IndiGo	Emirates	Qatar Airways	Red Wings	Air India	Aeroflot	China Eastern Airlines	Vistara Airline	Air Asia	Singapore Airline	Fly Dubai	Etihad Airways	Oman Air	Air Arabia	Turkish Airline	Fits Air	Other	Total
India	46.49	31.89	1.24	0.40	0.00	10.01	0.00	0.00	7.01	0.11	0.17	0.68	0.05	0.04	0.28	0.01	0.68	0.93	100.00
Russian Federation	2.46	1.12	3.13	4.01	44.06	0.58	30.34	0.06	0.10	2.05	0.08	2.10	1.13	1.12	3.45	0.34	0.19	3.67	100.00
Germany	12.50	0.76	17.11	21.23	0.00	1.11	0.00	0.00	0.15	1.50	0.20	1.93	2.04	3.55	0.19	1.91	0.06	35.76	100.00
United Kingdom	46.33	1.57	18.29	16.74	0.00	0.80	0.05	0.03	0.35	2.87	0.58	3.98	1.74	0.45	0.07	0.37	0.12	5.66	100.00
Australia	59.80	0.88	1.67	0.69	0.00	0.55	0.00	0.07	0.24	2.00	17.04	0.21	0.17	0.05	0.14	0.05	0.00	16.45	100.00
China	35.68	0.19	2.42	0.38	0.00	0.12	0.00	48.53	0.02	7.81	1.27	0.62	0.07	0.14	0.14	0.19	0.07	2.32	100.00
Canada	41.62	0.96	24.38	18.33	0.00	1.28	0.00	0.16	0.16	1.23	1.23	0.75	0.67	0.11	0.16	0.24	0.21	8.53	100.00
United States	24.01	4.23	9.26	23.52	0.00	2.07	0.03	0.19	0.80	2.07	3.24	1.08	2.78	0.25	0.19	0.90	0.12	25.28	100.00
Maldives	57.05	0.21	30.02	0.21	0.00	0.00	0.00	0.04	0.08	0.16	0.04	4.31	0.00	0.00	0.00	0.66	5.87	1.35	100.00
France	23.74	1.20	29.45	22.91	0.00	1.86	0.04	0.04	0.17	2.69	0.62	3.07	3.44	3.48	0.37	4.18	0.17	2.57	100.00



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