

Monthly Tourist Arrivals Report:

December 2023

Sri Lanka Tourism Development Authority

Introduction

The following document provides a synthesis of the most recent December, 2023 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st December 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 December 2023, Sri Lanka experienced a notable increase in the arrival of international tourists, reaching the peak for the entire year. The number of foreign visitors saw a remarkable surge of 128.7%, totaling 210,352 arrivals. This upswing may be linked to the peak tourist season, favorable conditions in Sri Lanka, and the recognition of Sri Lanka as one of the top destinations by travel-related entities.

Between January and December 2023, Sri Lanka reached a noteworthy achievement in the overall count of tourist arrivals. The total surpassed the previous year's figure of 719,978, reaching an impressive 1,487,303 visitors.

In December 2023, there was a significant upswing in visitors to Sri Lanka, with India, Russia, the United Kingdom, Germany, and Australia standing out as the key source markets. These countries played a

crucial role in propelling the growth in tourist arrivals, contributing significantly to the overall rejuvenation of Sri Lanka's tourism industry.

UNWTO had predicted a slowdown in the fourth quarter of 2023 due to existing economic and geopolitical challenges. Nevertheless, it is anticipated that the total number of international arrivals will reach 1.3 billion in 2023. Despite grappling with economic issues such as high inflation and reduced output, as well as specific geopolitical tensions and conflicts, international tourism is on track to approach pre-pandemic levels by 2024. According to the World Travel & Tourism Council's (WTTC) 2023 Economic Impact Research (EIR), the Travel & Tourism sector is nearing its 2019 peak, recovering by over 95%.

Table 1. Monthly tourist arrivals, December 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	100,388	205.5
July	47,293	143,039	202.4
August	37,760	136,405	261.2
September	29,802	111,938	275.6
October	42,026	109,199	159.8
November	59,759	151,496	153.51
December	91,961	210,352	128.7
TOTAL	719,978	1,487,303	106.6



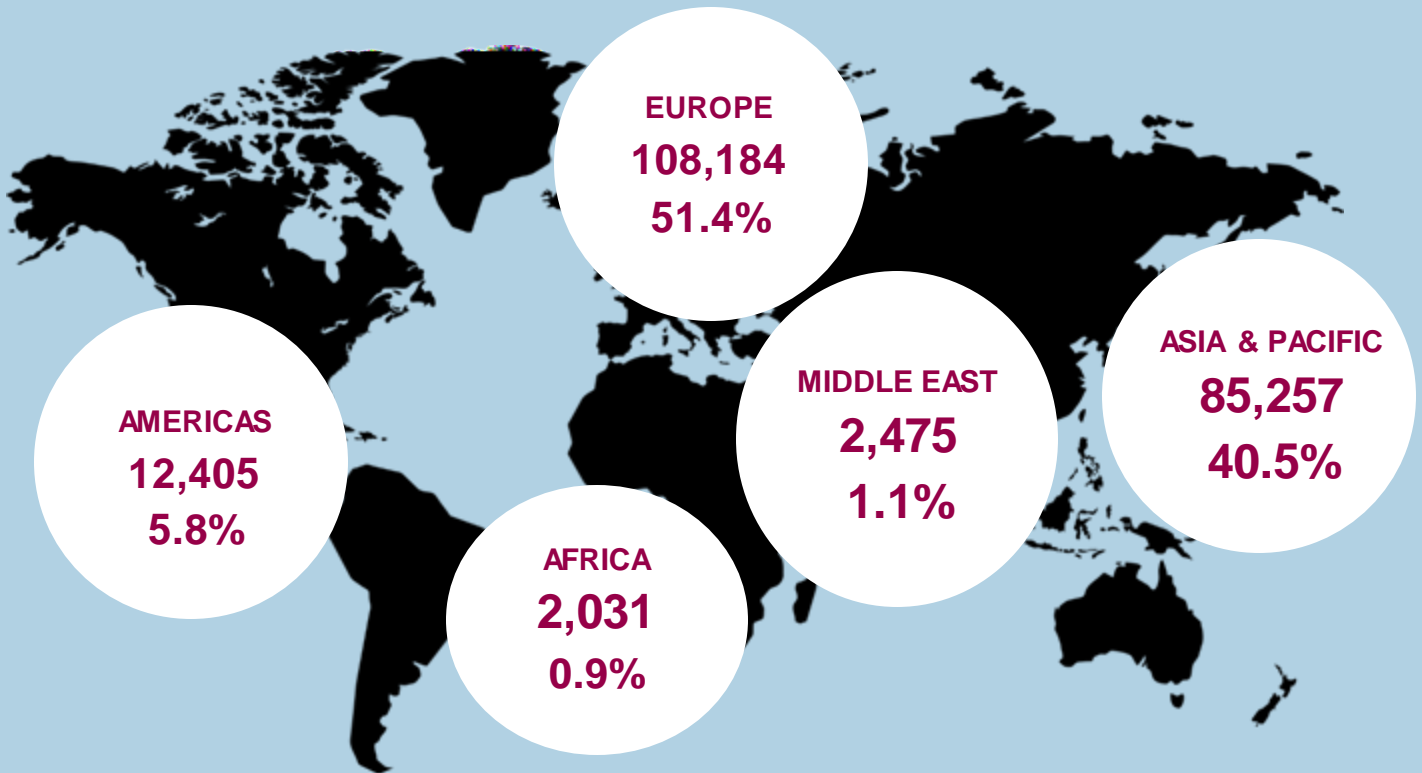
Tourist Arrivals | December 2023

210,352

Tourist arrivals by region and percentage share

December 2023

Map 1. Tourist arrivals by region and percentage share



Analyzing the patterns of tourist influx by region unveils the evolving dynamics and shifting influences that characterize Sri Lanka's appeal to global travelers. Europe had a considerable impact on Sri Lanka, representing a substantial portion of tourists at 51.4% of total arrivals. Simultaneously, Asia and the Pacific took the lead as the predominant source market for tourists visiting Sri Lanka, making up 40.5% of the overall influx. This alteration in the origin of tourists highlights the evolving dynamics in Sri Lanka's tourism sector, with Europe playing a significant role and Asia and the Pacific emerging as key contributors.

The surge in tourism owes its momentum to growing demand from nations like India, Russia, Germany, the United Kingdom, and Australia, all of which have significantly bolstered Sri Lanka's tourism sector. To explore these contributions further, the Americas made up 5.8% of the overall tourist arrivals, with the Middle East and Africa

contributing 1.1% and 0.9%, respectively. Each of these regions has played unique and discernible roles in shaping the features of Sri Lanka's tourism scenery.

The persistent geopolitical tensions in Ukraine and Palestine remained significant factors, presenting potential risks to international tourism in the latter part of 2023. According to the IMF's 'World Economic Outlook,' a decline in global growth was expected, with a decrease from 3.5% in 2022 to 3.0% in 2023. However, the World Travel & Tourism Council (WTTC) anticipates that by the end of 2023, nearly half of the 185 countries will have either fully recovered to pre-pandemic levels or be within 95% of full recovery. Conversely, the economic outlook for 2024 is marked by high uncertainty, characterized by increasing interest rates, ongoing global conflicts, and a growing frequency of climate disasters (Harvard Business Review, 2023).



Top primary markets and top potential markets

Top primary markets, December 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, December 2023



Note: The top potential 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.



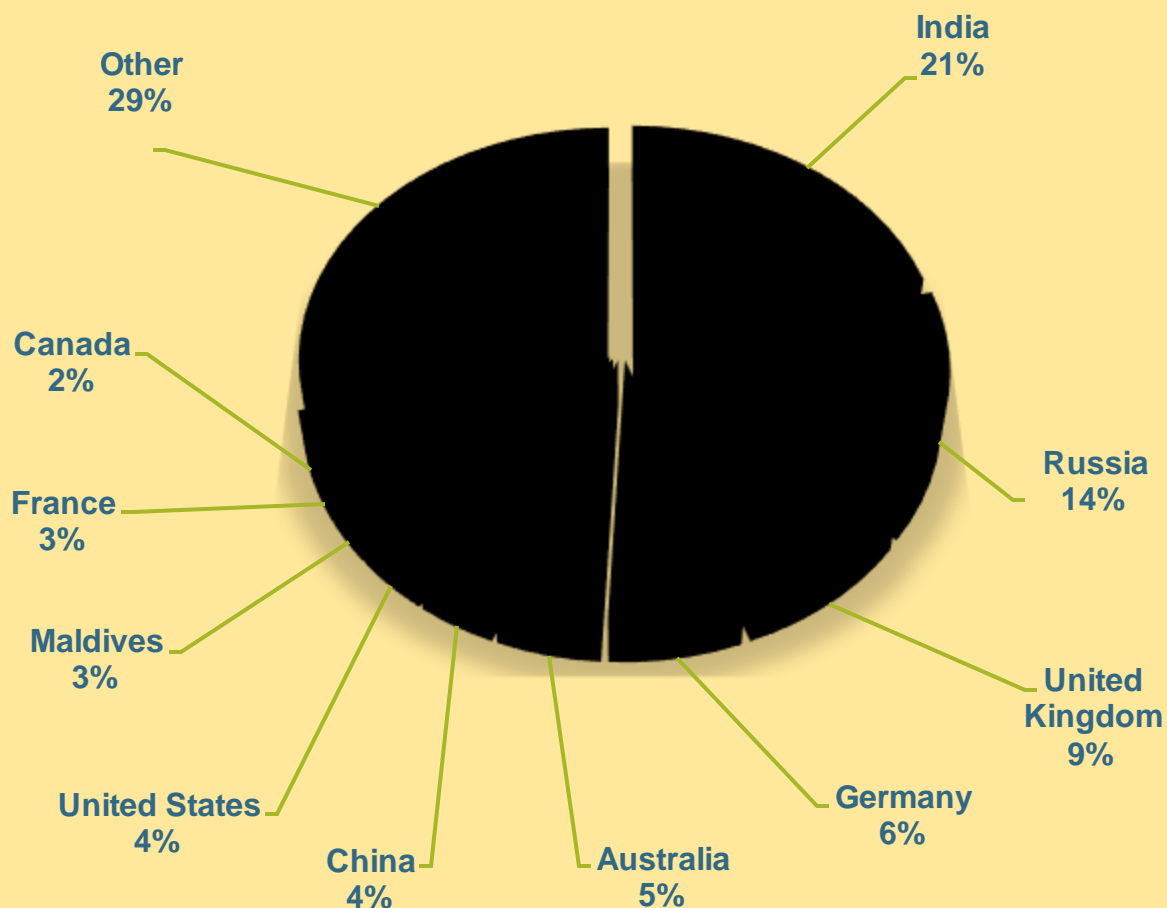


Top ten source markets

December 2023

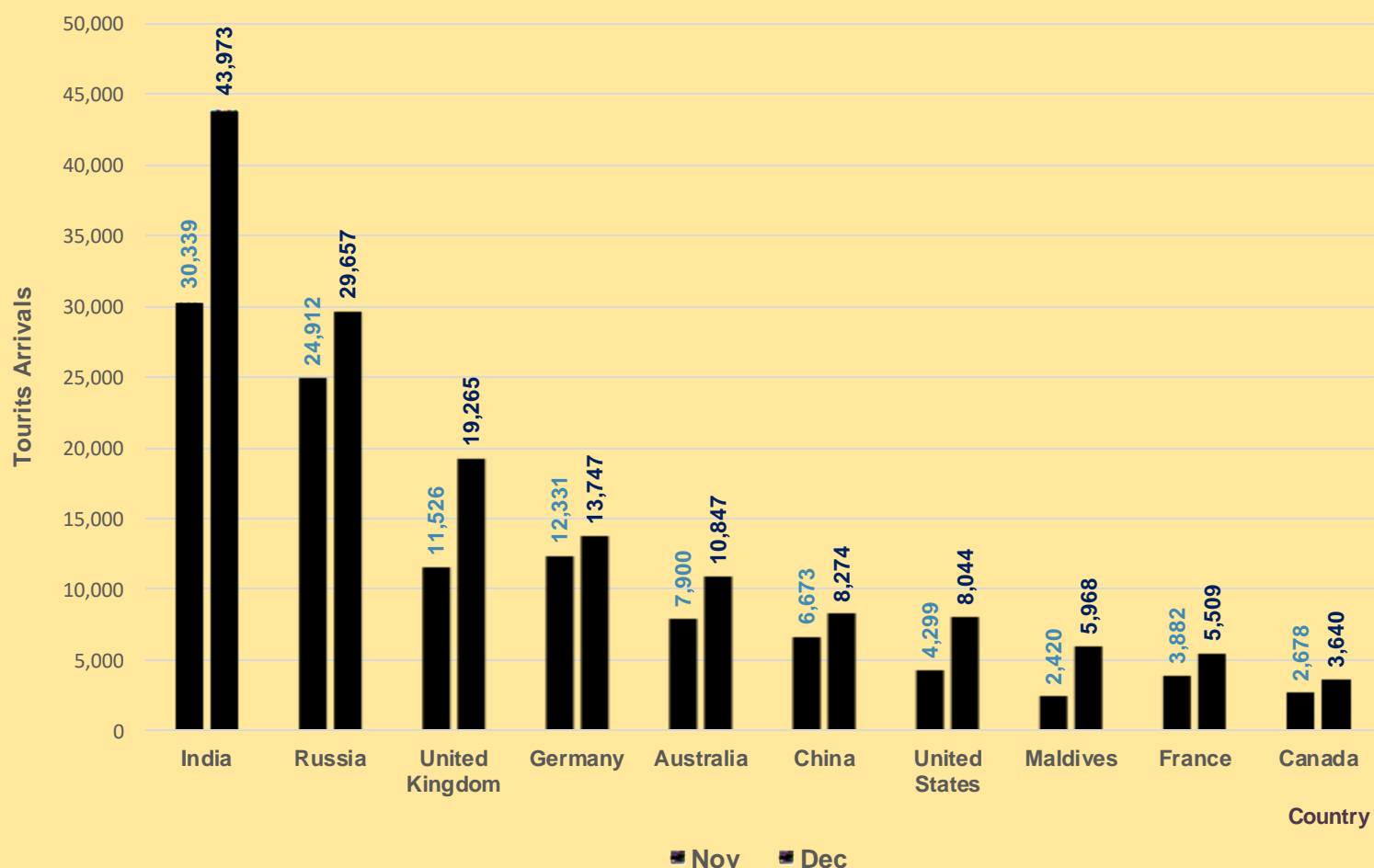
In December, India took the lead as the primary source of tourism for Sri Lanka, accounting for 21% of total arrivals. Following closely were Russia, the United Kingdom, Germany, and Australia, contributing 14%, 9%, 6%, and 5%, respectively. These statistics highlight shifting preferences and evolving travel trends. Notably, there has been considerable increase in arrivals from China, Germany, India & United Kingdom compared to the previous December, indicating a shift towards emerging destinations. The significant presence of Maldives and Canada in the top ten source markets is noteworthy. Various factors, such as the commencement of the peak season, improved air connectivity, favorable local conditions, geographical proximity, and geopolitical considerations, collectively position these countries as the primary contributors to Sri Lanka's tourism.

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



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

Rank	Country of Residence	Tourist Arrivals (December 2023)			Tourist Arrivals (December 2022)
		By Air	By Sea	Total	
1	India	43,804	169	43,973	17,350
2	Russian Federation	29,329	328	29,657	19,963
3	United Kingdom	16,689	2,576	19,265	7,879
4	Germany	11,212	2,535	13,747	4,984
5	Australia	10,599	248	10,847	5,158
6	China	8,270	04	8,274	635
7	United States	6,929	1,115	8,044	3,638
8	Maldives	5,968	0	5,968	3,444
9	France	5,473	36	5,509	2,665
10	Canada	3,341	299	3,640	2,618

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



Top ten source markets

January to December 2023

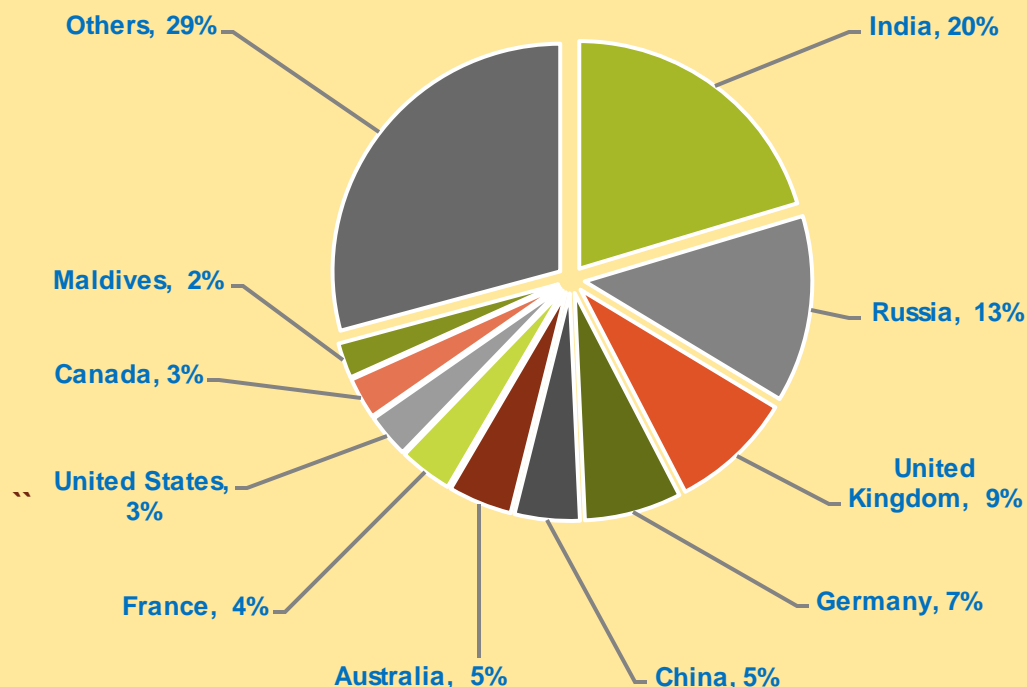
From January to December 2023, Sri Lanka experienced an increase in international tourist arrivals from its primary source markets compared to the corresponding period in 2022. Particularly noteworthy was the significant surge in tourists coming from countries like India, Australia, the USA, and the Maldives, making substantial contributions to the overall growth in tourist numbers for the year 2023.

However, it is important to emphasize that tourist arrivals from the United Kingdom, France, Germany, and Canada did not exhibit significant growth compared to the same period in the previous year. This suggests evolving travel preferences and patterns specific to these countries.

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

Rank	Country of Residence	Tourist Arrivals (Jan. – Dec. 2023)	Tourist Arrivals (Jan. – Dec.2022)
1	India	302,844	123,004
2	Russian Federation	197,498	91,272
3	United Kingdom	130,088	85,187
4	Germany	102,539	55,542
5	China	68,789	4,715
6	Australia	67,436	30,924
7	France	56,251	35,482
8	United States	46,344	22,230
9	Canada	43,944	26,845
10	Maldives	37,328	18,880
11	Others	434,242	225,897
Total		1,487,303	719,978

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





Tourist arrivals by purpose of visit

December 2023

An analysis of the motivations driving tourists to visit Sri Lanka reveals distinct trends in their travel purposes. A significant majority, comprising 65% of all visits, chose Sri Lanka as their destination for leisure and vacation, highlighting its widespread popularity as a top choice for those seeking relaxation and enjoyable experiences. Another 10% of tourists arrived to reconnect with friends and relatives, emphasizing Sri Lanka's ability to attract individuals with personal connections or a desire to nurture relationships with loved ones residing there.

In contrast, business-related purposes constituted only 2% of tourist visits, indicating a relatively small segment of visitors arriving for professional engagements. Additionally, 6% of tourists came to Sri Lanka for MICE (Meetings, Incentives, Conferences, and Exhibitions) purposes, showcasing the country's growing reputation as a venue for such events. Furthermore, niche interests were represented, with 0.6% and 0.036% visiting for health/Ayurvedic and educational purposes, respectively. These findings underscore Sri Lanka's multifaceted appeal and highlight its attractiveness as a destination that caters to a wide range of traveler preferences and goals.

In December, across the majority of source markets, the primary reason for visiting Sri Lanka was leisure. Specifically, the data indicates that a significant proportion of tourists from key source markets, including India (66.2%), Russia (65.9%), the United Kingdom (70.2%), Germany (76.3%), China (85.5%), France (74.2%), the United States (60.1%), chose Sri Lanka as a destination for recreational purposes. This data underscores the country's strong appeal as a place for relaxation and enjoyable experiences.

As indicated by the purpose of visits statistics, December is a favored month for visiting friends and relatives in Sri Lanka. 47.2% of Australian tourists, and 47.7% of Canadian tourists primarily chose Sri Lanka as a destination to reconnect with friends and relatives.

In addition, 15.5% of Russian tourists and 5.2% of Chinese tourists traveled to Sri Lanka for MICE purposes, while 5% of Indian visitors traveled to Sri Lanka for business purposes. Furthermore, 4% of German tourists journeyed to Sri Lanka with the specific intention of seeking health-related services.

Chart 4: Purpose of visit

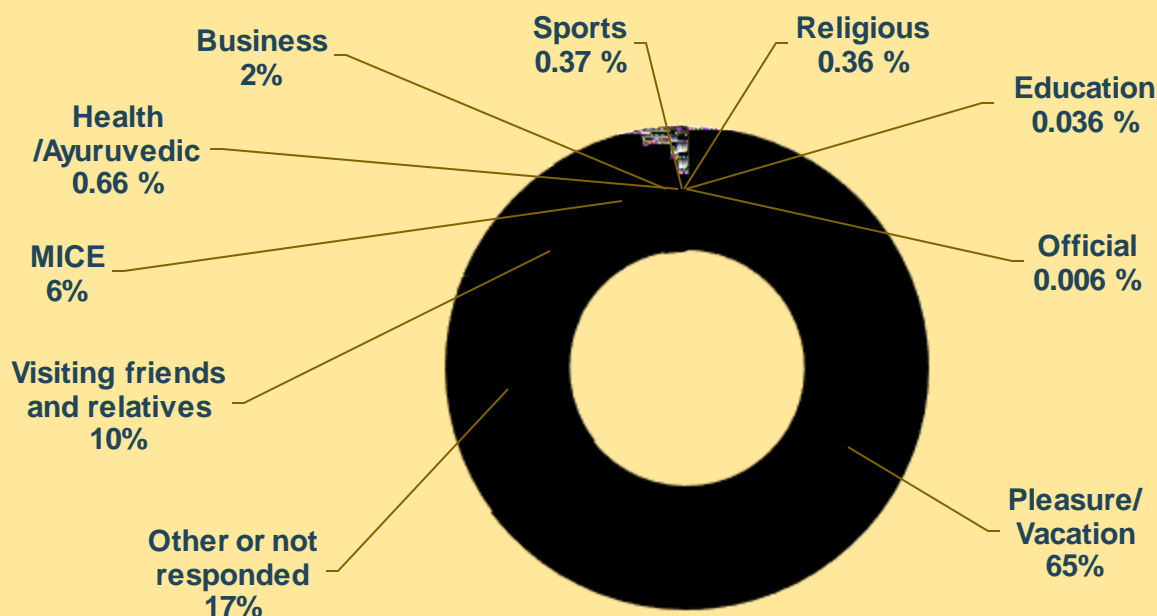
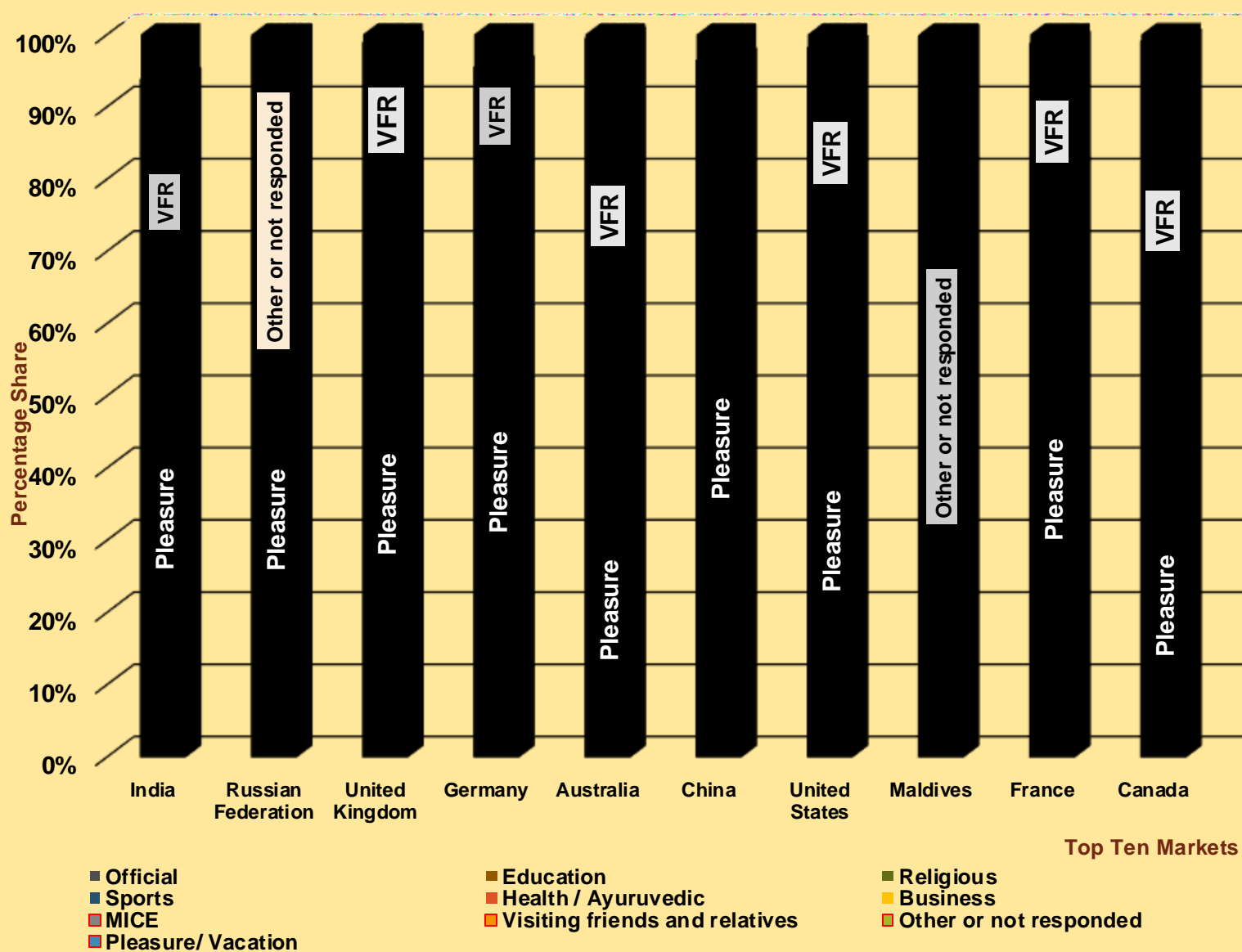


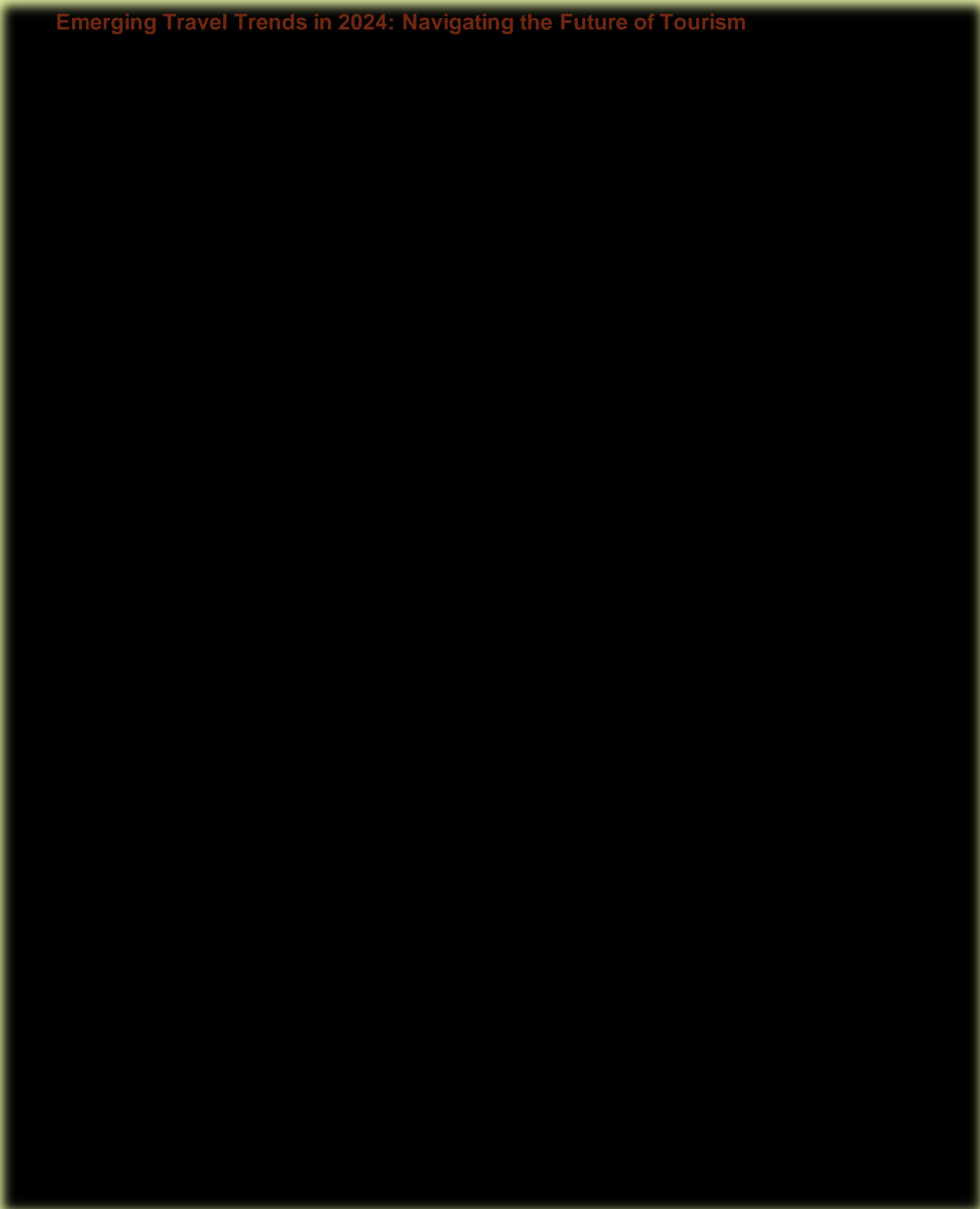


Chart 5 : Purpose of visit vs main source markets



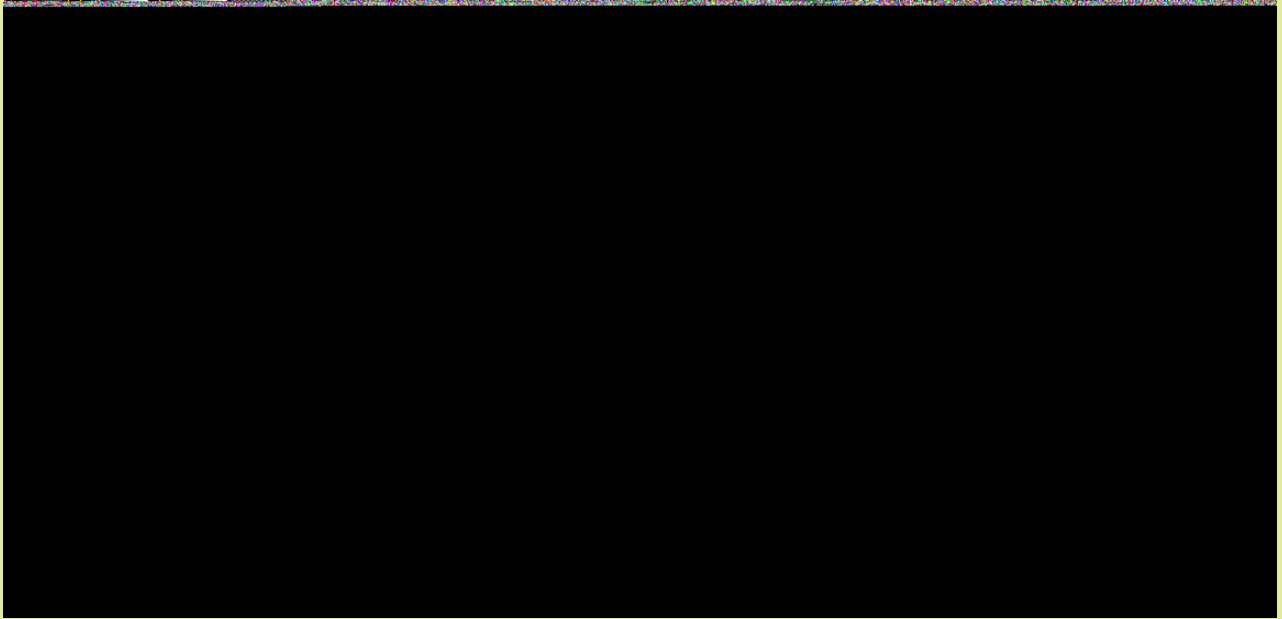


Emerging Travel Trends in 2024: Navigating the Future of Tourism









Source: EuroMonitor

<https://www.cntraveller.com/article/travel-trends-2024>

<https://www.forbes.com/sites/angelinavillaclarke/2023/11/12/travel-trends-2024-report-part-1-authenticity-and-the-rise-in-ai/?sh=144407cd1f5f>

<https://www.euromonitor.com/article/top-trends-for-travel-in-2024>

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International tourist arrivals by country of residence

	December 2023			Tourist Arrivals Dec 2022	% Change Dec (23/22) 2023	Total Tourist Arrivals up to December 2023	Total Tourist Arrivals up to Dec 2022	% Change up to Dec (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
AMERICAS	10,889	1,516	12,405	6,608	87.7	95,263	51,429	85.2
North America	10,355	1,476	11,831	6,320	87.2	91,080	49,409	84.3
Canada	3,341	299	3,640	2,618	39.0	43,944	26,845	63.7
Mexico	85	62	147	64	129.7	792	334	137.1
United States	6,929	1,115	8,044	3,638	121.1	46,344	22,230	108.5
Antarctica	0	0	0	1	0	0	1	-
Antarctica	0	0	0	1	0	0	1	-
Carribean & Central America	93	3	96	50	92.0	701	306	129.1
Costa Rica	09	01	10	6	66.7	62	40	55.0
Jamaica	10	0	10	2	400.0	57	13	338.5
Others	74	02	76	42	81.0	582	253	130.0
South America	441	37	478	237	101.7	3,482	1,713	103.3
Argentina	53	14	67	55	21.8	687	268	156.3
Brazil	219	17	236	97	143.3	1,337	669	99.9
Chile	39	02	41	23	78.3	394	182	116.5
Colombia	75	04	79	27	192.6	539	304	77.3
Others	55	0	55	35	57.1	525	290	81.0
AFRICA	1,826	205	2,031	709	186.5	9,950	4,679	112.7
North Africa	335	0	335	187	79.1	2,621	1,818	44.2
Morocco	134	0	134	56	139.3	789	446	76.9
Sudan	65	0	65	45	44.4	834	819	1.8
Others	136	0	136	86	58.1	998	553	80.5
Sub-Saharan Africa	1,491	205	1,696	522	224.9	7,329	2,861	156.2
Kenya	126	0	126	42	200.0	613	230	166.5
Mauritius	84	110	194	41	373.2	471	130	262.3
Nigeria	06	0	06	06	0.0	93	27	244.4
South Africa	810	91	901	258	249.2	3,444	1,502	129.3
Others	465	04	469	175	168.0	2,708	972	178.6



	December 2023			Tourist Arrivals Dec 2022	% Change Dec (23/22)	Total Tourist Arrivals up to Dec 2023	Total Tourist Arrivals up to Dec 2022	% Change up to Dec (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	84,692	565	85,257	32,455	162.7	596,933	213,537	179.5
North East Asia	12,141	23	12,164	1,743	597.9	100,790	10,061	901.8
China	8,270	4	8,274	635	-	68,789	4,715	-
Japan	2,549	05	2,554	708	260.7	19,583	3,087	534.4
South Korea	950	07	957	322	197.2	7,298	1,843	296.0
Taiwan	367	07	374	77	385.7	4,999	363	-
Others	05	0	05	01	400.0	121	53	128.3
South East Asia	5,024	69	5,093	2,034	150.4	36,060	12,095	198.1
Cambodia	27	01	28	20	40.0	519	157	230.6
Indonesia	266	11	277	134	106.7	2,352	885	165.8
Malaysia	1,777	07	1,784	519	243.7	10,940	2,779	293.7
Myanmar	103	0	103	27	281.5	1,130	252	348.4
Philippines	442	06	448	236	89.8	4,164	1,961	112.3
Singapore	1,561	40	1,601	720	122.4	9,551	3,770	153.3
Thailand	633	04	637	311	104.8	4,922	1,725	185.3
Vietnam	202	0	202	58	248.3	2,307	519	344.5
Others	13	0	13	09	44.4	175	47	272.3
Oceania	11,952	302	12,254	5,761	112.7	75,635	33,876	123.3
Australia	10,599	248	10,847	5,158	110.3	67,436	30,924	118.1
New Zealand	1,289	54	1,343	572	134.8	7,913	2,866	176.1
Others	64	0	64	31	106.5	286	86	232.6
South Asia	55,575	171	55,746	22,917	143.3	384,448	157,505	144.1
Afghanistan	16	0	16	11	45.5	181	39	364.1
Bangladesh	3,185	0	3,185	662	381.1	17,846	3,817	367.5
Bhutan	68	0	68	09	655.6	433	139	211.5
India	43,804	169	43,973	17,350	153.4	302,844	123,004	146.2
Iran	898	02	900	362	148.6	10,322	4,301	140.0
Maldives	5,968	0	5,968	3,444	73.3	37,328	18,880	97.7
Nepal	468	0	468	181	158.6	4,750	1,065	346.0
Pakistan	1,168	0	1,168	898	30.1	10,744	6,260	71.6
EUROPE	102,127	6,057	108,184	50,187	115.6	757,327	432,226	75.2
Northern Europe	22,570	2,652	25,222	10,161	148.2	165,485	108,264	52.9
Denmark	1,433	07	1,440	551	161.3	10,346	7,278	42.2
Finland	471	02	473	159	197.5	2,287	1,500	52.5
Norway	1,024	11	1,035	408	153.7	8,747	5,983	46.2
Sweden	2,106	12	2,118	892	137.4	8,643	5,097	69.6
United Kingdom	16,689	2,576	19,265	7,879	144.5	130,088	85,187	52.7
Others	847	44	891	272	227.6	5,374	3,219	66.9



	December 2023			Tourist Arrivals Dec 2022	% Change Dec (23/22)	Total Tourist Arrivals up to Dec 2023	Total Tourist Arrivals up to Dec 2022	% Change up to Dec (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
Western Europe	24,739	2,795	27,534	11,050	149.2	233,297	128,279	81.9
Austria	1,809	74	1,883	619	204.2	10,594	5,541	91.2
Belgium	981	14	995	512	94.3	10,667	6,164	73.1
France	5,473	36	5,509	2,665	106.7	56,251	35,482	58.5
Germany	11,212	2,535	13,747	4,984	175.8	102,539	55,542	84.6
Netherlands	2,606	66	2,672	956	179.5	29,056	11,987	142.4
Switzerland	2,588	66	2,654	1,248	112.7	23,556	13,260	77.6
Others	70	04	74	66	12.1	634	303	109.2
Central/ Eastern Europe	46,105	475	46,580	24,422	90.7	276,921	159,062	74.1
Belarus	1,561	05	1,566	582	169.1	10,969	3,621	202.9
Czech Republic	2,459	07	2,466	529	366.2	12,056	7,350	64.0
Estonia	703	03	706	111	536.0	1,808	978	84.9
Hungary	1,011	29	1,040	300	246.7	3,786	2,324	62.9
Kazakhstan	2,378	21	2,399	262	815.6	5,130	8,068	(36.4)
Lithuania	487	03	490	158	210.1	2,722	2,115	28.7
Poland	3,195	22	3,217	524	513.9	17,946	15,195	18.1
Romania	946	09	955	407	134.6	4,092	3,313	23.5
Russia	29,329	328	29,657	19,963	48.6	197,498	91,272	116.4
Slovakia	461	01	462	206	124.3	4,464	2,432	83.6
Ukraine	1,035	07	1,042	544	91.5	5,082	14,917	(65.9)
Others	2,540	40	2,580	836	208.6	11,368	7,477	52.0
Southern/ Mediterranean Europe	8,713	135	8,848	4,554	94.3	81,624	36,621	122.9
Greece	338	06	344	174	97.7	1,816	899	102.0
Italy	3,377	12	3,389	1,206	181.0	22,242	7,449	198.6
Portugal	523	04	527	156	237.8	3,943	1,906	106.9
Spain	2,626	41	2,667	991	169.1	23,905	12,895	85.4
Turkey	465	50	515	224	129.9	3,739	1,514	147.0
Israel	419	02	421	1,457	(71.1)	19,517	9,326	109.3
Others	965	20	985	346	184.7	6,462	2,632	145.5
MIDDLE EAST	2,463	12	2,475	2,002	23.6	27,830	18,107	53.7
Bahrain	104	0	104	88	18.2	1,232	510	141.6
Egypt	468	04	472	220	114.5	3,091	2,340	32.1
Iraq	94	0	94	145	(35.2)	902	1,113	(19.0)
Jordan	302	02	304	335	(9.3)	3,604	2,472	45.8
Kuwait	150	0	150	96	56.3	1,955	952	105.4
Lebanon	484	0	484	267	81.3	3,347	1,606	108.4
Oman	108	0	108	157	(31.2)	2,038	876	132.6
Qatar	33	0	33	57	(42.1)	822	301	173.1
Saudi Arabia	290	03	293	324	(9.6)	6,797	5,952	14.2
United Arab Emirates	339	03	342	207	65.2	2,945	1,347	118.6
Others	91	0	91	106	(14.25)	1,097	638	71.9
TOTAL	201,997	8,355	210,352	91,961	128.7	14,87303	719,978	106.6



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

An examination of tourists' departure airports and preferred airlines when heading to Sri Lanka underscores the pivotal role of air travel in the country's tourism sector. As illustrated by the data in Chart 6, approximately 30% of tourists chose departure airports in Dubai, Chennai, and Doha as their final transit points before arriving in Sri Lanka. Additionally, the primary airlines favored by tourists in reaching Sri Lanka were Sri Lankan Airlines, Qatar Airways, and Emirates, collectively accounting for 47% of the total tourist arrivals. The initiation of Rossiya Airlines and LOT Polish Airlines from January onwards is expected to bolster the increase in tourist arrivals to Sri Lanka. This highlights the crucial significance of air transportation in facilitating tourism in Sri Lanka, with specific airports and airlines playing a substantial role in accommodating a significant portion of visitors.

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

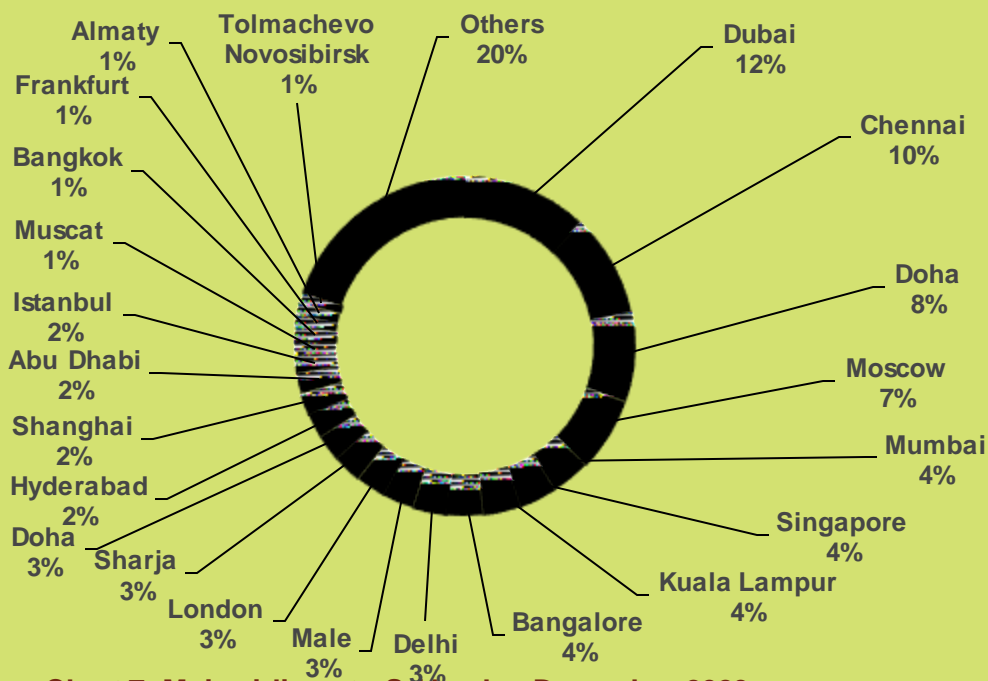
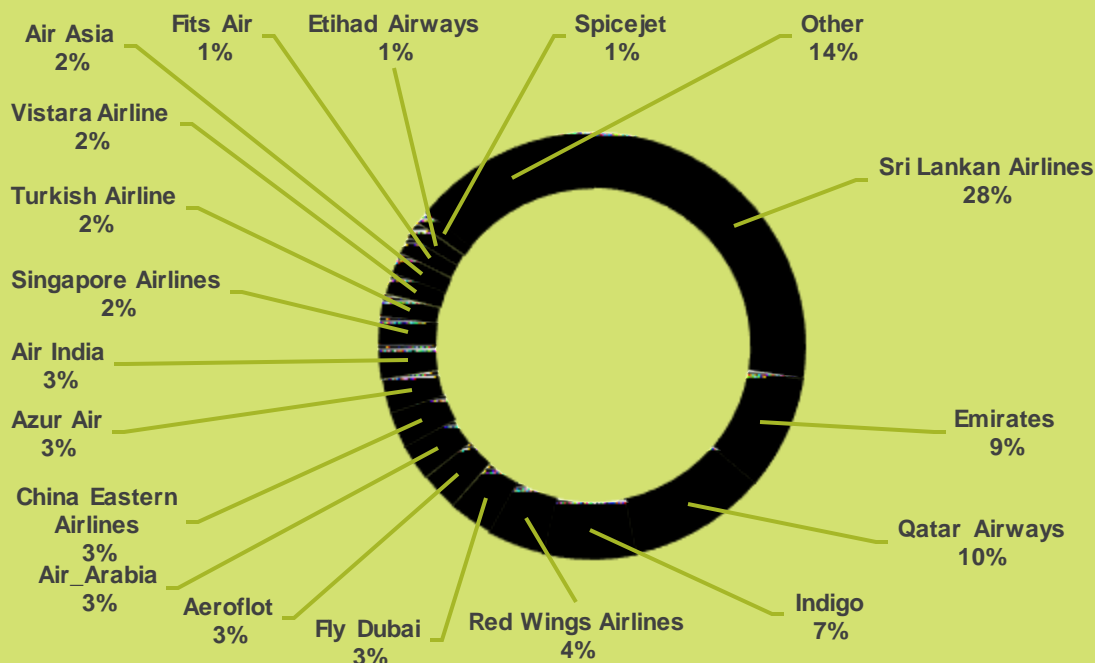


Chart 7. Main airlines to Sri Lanka, December 2023





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

December 2023

The choice of airlines plays a crucial role in shaping the travel experiences of tourists heading to Sri Lanka. Preferences in airlines are often intricately tied to the home countries of the visitors, reflecting a diverse array of carriers catering to different regions.

For instance, Indian travelers frequently prefer Sri Lankan Airlines and IndiGo, while Russian tourists lean towards Red Wings and Aeroflot. Conversely, Sri Lankan Airlines is a popular choice among tourists from the United Kingdom, Germany, Australia, the United States, Maldives, France, and Canada. Chinese tourists show a preference for China Eastern. Regarding final ports, Chennai is the most utilized airport for Indian tourists, while Dubai is the primary port for tourists from the United Kingdom and Canada. Doha serves as the main final port for tourists from Germany, the USA, and France. For Australians and Russians, Singapore and Moscow are the main final airports, respectively. This underscores the critical role of accessibility in promoting tourism in Sri Lanka. It emphasizes that tourists' decisions regarding airlines and departure airports are significantly shaped by their home countries, highlighting the importance of seamless connections in attracting visitors to Sri Lanka.

Table 4. Top ten markets vs. main airlines to Sri Lanka, December 2023

Table 5. Top ten markets vs. main last departure airports to Sri Lanka, December 2023



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