

Monthly Tourist Arrivals Report:

August 2023

Sri Lanka Tourism Development Authority

Introduction

The following document provides a synthesis of the most recent August, 2023 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st August 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 August 2023, Sri Lanka experienced a surge in international tourist arrivals compared to the same period in 2022. The number of foreign tourist arrivals soared by 261.2% year-on-year, reaching a total of 136,405 visitors. This substantial upswing can be attributed to various key factors driving the revival of Sri Lanka's tourism sector. These factors include the ongoing recovery of the tourism industry, a pent-up demand for travel following pandemic-related restrictions, improvements in air connectivity, and the reopening of China as a pivotal market for tourism. Notably, the United Nations World Tourism Organization (UNWTO) has expressed confidence in the continuity of this positive trend throughout the year, underscoring Sri Lanka's potential for sustained growth in tourism. This surge aligns with a broader global trend of recovering international tourism, reflecting the allure of Sri Lanka's diverse attractions, encompassing its rich culture, natural beauty, and historical sites,

which continue to captivate travelers from around the world.

In the period from January to August 2023, the cumulative count of tourist arrivals in Sri Lanka reached an impressive 904,318, surpassing the figures from the previous year, which recorded 496,430 arrivals.

In August 2023, Sri Lanka's tourism sector saw a significant influx of visitors, with India, the United Kingdom, China, Germany, and Russia emerging as the top five source markets. These countries played a pivotal role in driving the surge in tourist arrivals, contributing substantially to the overall recovery of Sri Lanka's tourism sector.

Additionally, when comparing tourist arrivals in August 2023 to July 2023, there was a notable decrease of 4.6%. This decline in arrivals indicates a temporary dip in tourist activity during this period. It's important to consider various factors that could contribute to such fluctuations, including seasonal variations, and other external factors impacting tourism trends.

Table 1. Monthly tourist arrivals, August 202

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		
October	42,026		
November	59,759		
December	91,961		
TOTAL	719,978	904,318	



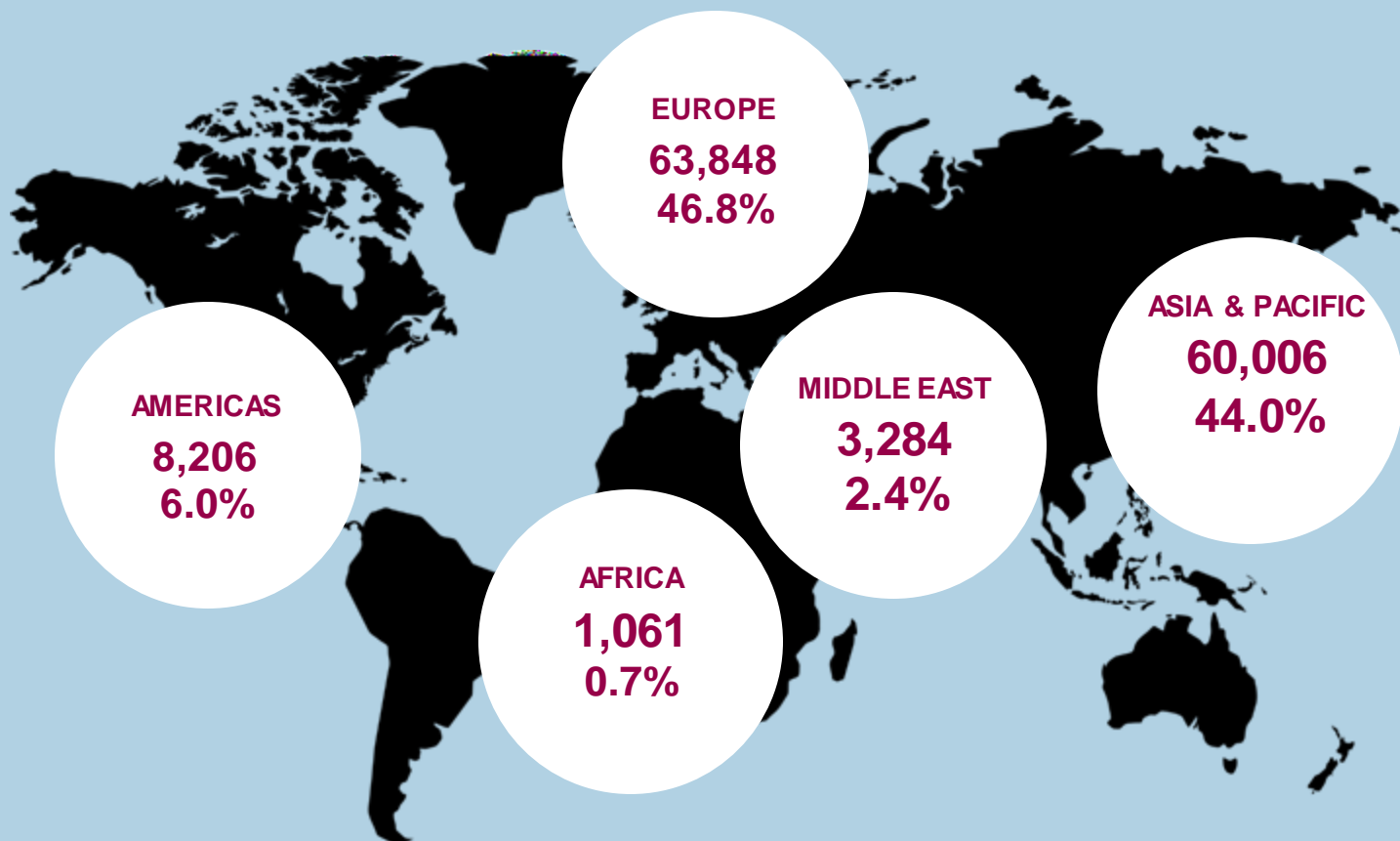
Tourist Arrivals | August 2023

136,405



Tourist arrivals by region and percentage share August 2023

Map 1. Tourist arrivals by region and percentage share



Europe played a predominant role in Sri Lanka's tourism landscape, contributing significantly to the majority of tourists, accounting for 46.8% of total arrivals. Simultaneously, the Asia Pacific region emerged as the primary source market for tourist traffic to Sri Lanka, constituting 44% of the overall influx. This shift in tourist origins highlights the evolving dynamics in Sri Lanka's tourism industry, with Europe as a major contributor and the Asia Pacific region as a key source of tourists.

The surge in tourism can be attributed to a growing demand from countries like India, the United Kingdom, China, Germany, and Russia, all of which have played a pivotal role in boosting Sri Lanka's tourism sector.

Breaking down the contributions further, the Americas have contributed 6% to the total tourist arrivals, while the Middle East has accounted for 2.4%. These regions have played their respective roles in shaping Sri Lanka's tourism landscape.



Top primary markets and top potential markets

Top primary markets, August 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, August 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

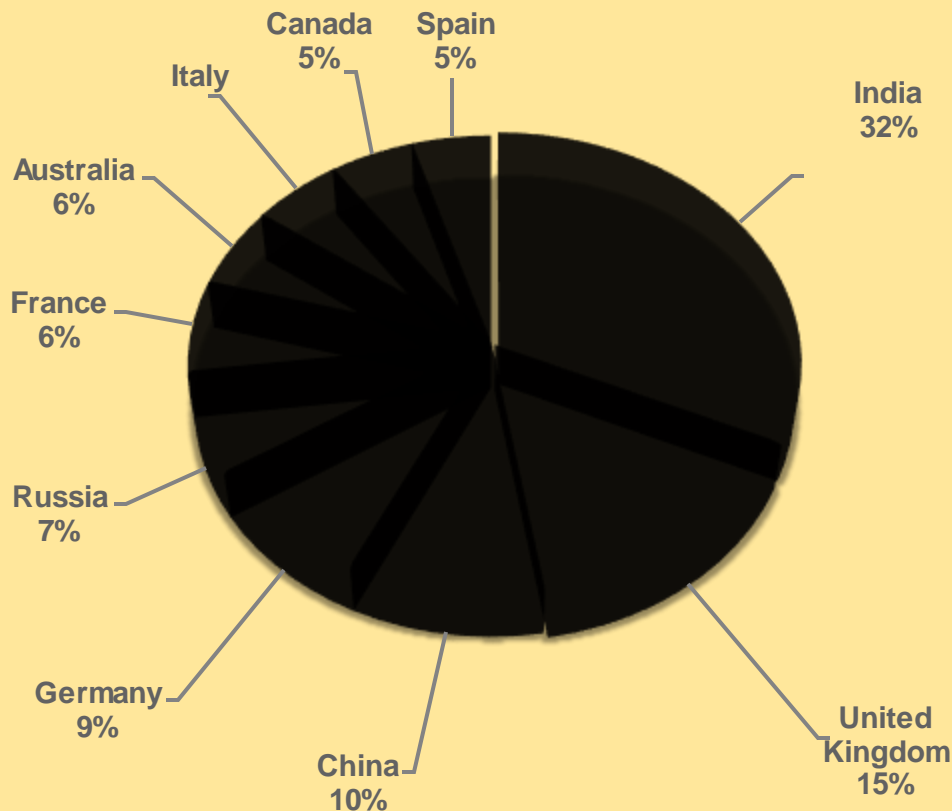
August 2023

In August, the primary source markets for tourism in Sri Lanka were India, the United Kingdom, China, Germany, and Russia. India accounted for the largest share of arrivals at 32%, while the United Kingdom, China, Germany, and Russia represented 15%, 10%, 9%, and 7% of arrivals, respectively. These trends indicate shifts in outbound travel preferences and travel patterns. The growth in arrivals from China, Italy and Spain signals a transition towards emerging destinations.

Improved air accessibility, favorable conditions within the country, geographical proximity, and geopolitical factors have jointly contributed to making these countries the primary sources of tourism for Sri Lanka.

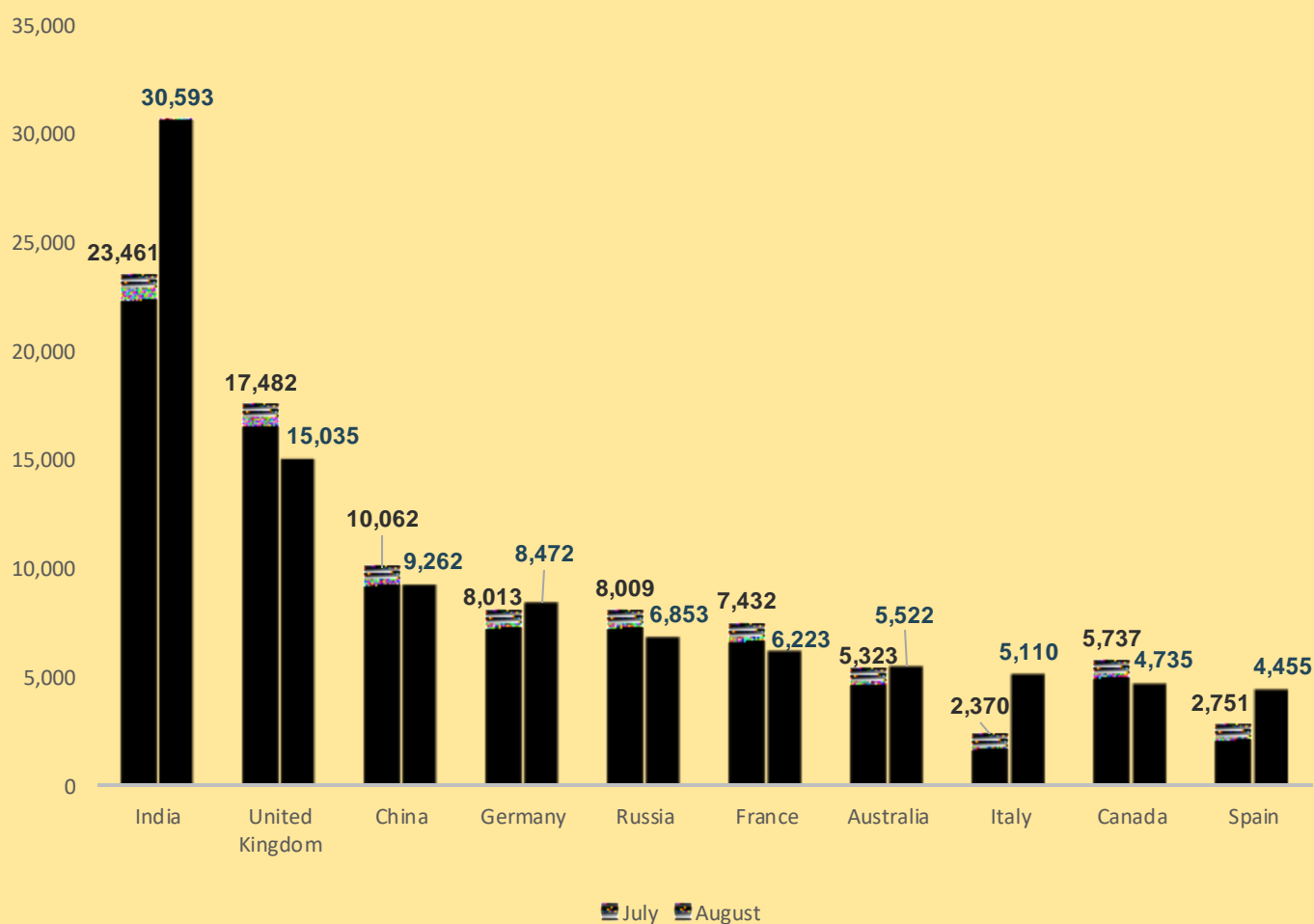
The growth rates of tourist arrivals from different countries have been influenced by global and local conditions. While Russia, China, and India have experienced significant growth in arrivals, the United Kingdom, France, and Canada have demonstrated the lowest growth rates compared to August 2022. This disparity in growth rates may be attributed to emerging trends and responses to prevailing global and local conditions.

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



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

Rank	Country of Residence	Tourist Arrivals (August 2023)			Tourist Arrivals (August 2022)
		By Air	By Sea	Total	
1	India	26,759	3,834	30,593	5,340
2	United Kingdom	15,018	17	15,035	6,776
3	China	9,262	0	9,262	534
4	Germany	8,471	1	8,472	3,251
5	Russian Federation	6,853	0	6,853	1,426
6	France	6,221	2	6,223	2,784
7	Australia	5,518	4	5,522	1,898
8	Italy	5,110	0	5,110	937
9	Canada	4,734	1	4,735	2,581
10	Spain	4,455	0	4,455	2,148

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



Top ten source markets

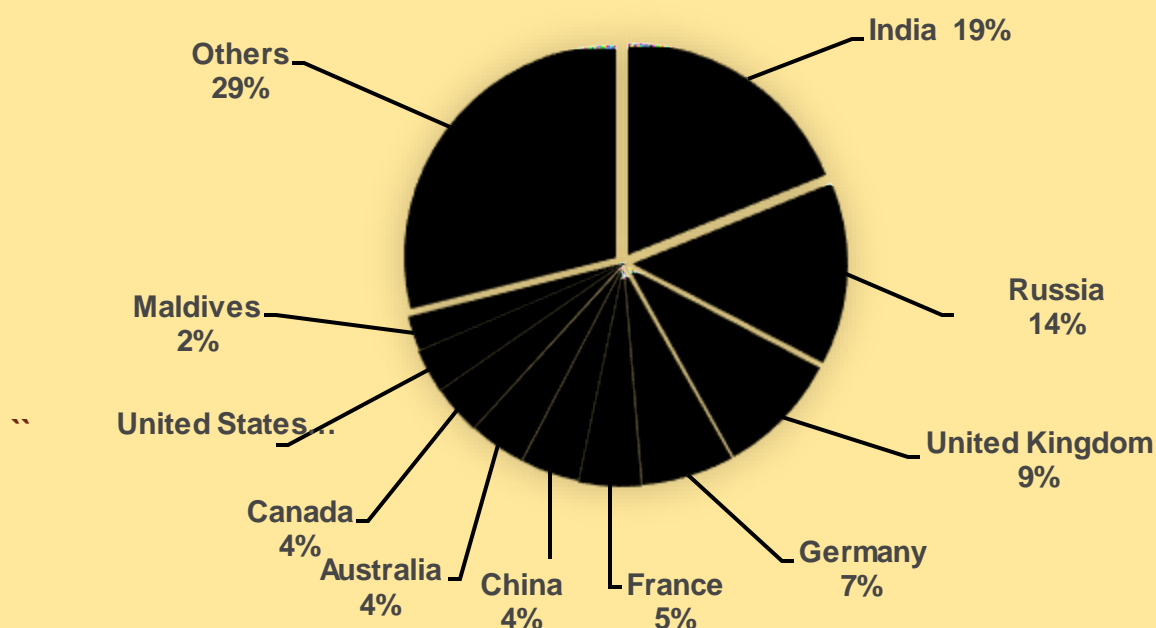
January to August 2023

In comparison to the same period in 2022, Sri Lanka's primary sources of international tourists from January to August 2023 included India, the Russian Federation, the United Kingdom, Germany, and France. Notably, there was an increase in tourist arrivals from countries like Russia, India, the Maldives, and the United States during this period, which contributed to the overall growth in tourist arrivals in Sri Lanka for the first eight months of 2023.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ August 2023)	Tourist Arrivals (Jan ~ August 2022)
1	India	170,247	80,132
2	Russian Federation	125,137	49,747
3	United Kingdom	83,339	65,655
4	Germany	61,682	40,359
5	France	41,243	28,235
6	Australia	39,186	18,412
7	China	37,743	2,384
8	Canada	32,898	19,056
9	United States	28,993	14,259
10	Maldives	22,791	10,553
11	Others	261,059	167,638
Total		904,318	496,430

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



Tourist arrivals by purpose of visit

August 2023

An examination of the motivations behind tourists' visits to Sri Lanka reveals distinct trends in their purposes. The majority, comprising 58% of all visits, chose Sri Lanka as a destination for leisure and vacation, underlining its appeal as a top choice for those seeking relaxation and enjoyable experiences. Furthermore, 18% of tourists visited to reconnect with friends and relatives, emphasizing Sri Lanka's ability to attract individuals with personal connections or a desire to foster relationships with loved ones residing there.

In contrast, business-related reasons accounted for only 5% of tourist visits, indicating a relatively small segment of visitors arriving for professional engagements. Additionally, 5% of tourists arrived in Sri Lanka for MICE (Meetings, Incentives, Conferences, and Exhibitions) purposes, showcasing the country's growing presence as a venue for such events. Furthermore, niche interests were represented, with 0.37% 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 catering to a wide range of traveler preferences and objectives.

Among the prominent source markets, including India, China, Germany, France, Russia, Italy, and Spain, the primary motive for visiting Sri Lanka was leisure and vacation, constituting the majority of visits. Specifically, Indian tourists accounted for 65.3%, Chinese tourists 86%, German tourists 63%, French tourists 63%, Russian tourists 37%, Italian tourists 79%, and Spanish tourists 85% who visited for leisure purposes. This data indicates that the majority of tourists from these key source markets chose Sri Lanka as a destination for recreational purposes, highlighting the country's allure as a place for relaxation and enjoyable experiences.

The majority of Canadian tourists (76%), British tourists (50%), and Australian tourists (49%) visited Sri Lanka primarily to reconnect with friends and relatives, likely due to the presence of a Sri Lankan diaspora in these countries. Only 16% of Canadian tourists, 39% of British tourists, and 37% of Australian tourists came for leisure or vacation purposes. This data suggests that a significant portion of tourists from these countries had a strong motivation to visit Sri Lanka based on personal connections and family ties, underlining the importance of Sri Lanka's diaspora communities in attracting visitors from these nations.

Furthermore, a proportion of Indian tourists, amounting to 17.5%, and 4.2% of Indian visitors came to Sri Lanka for business-related reasons and MICE (Meetings, Incentives, Conferences, and Exhibitions) purposes, respectively. Additionally, 2.0% of German tourists traveled to Sri Lanka with the intent of seeking health-related services.

Chart 4: Purpose of visit

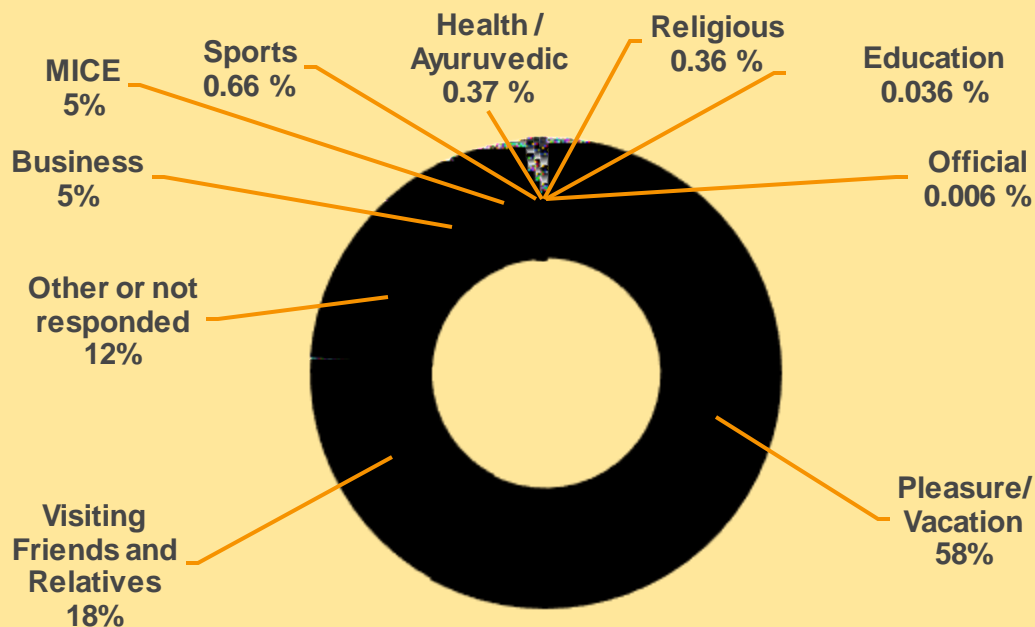
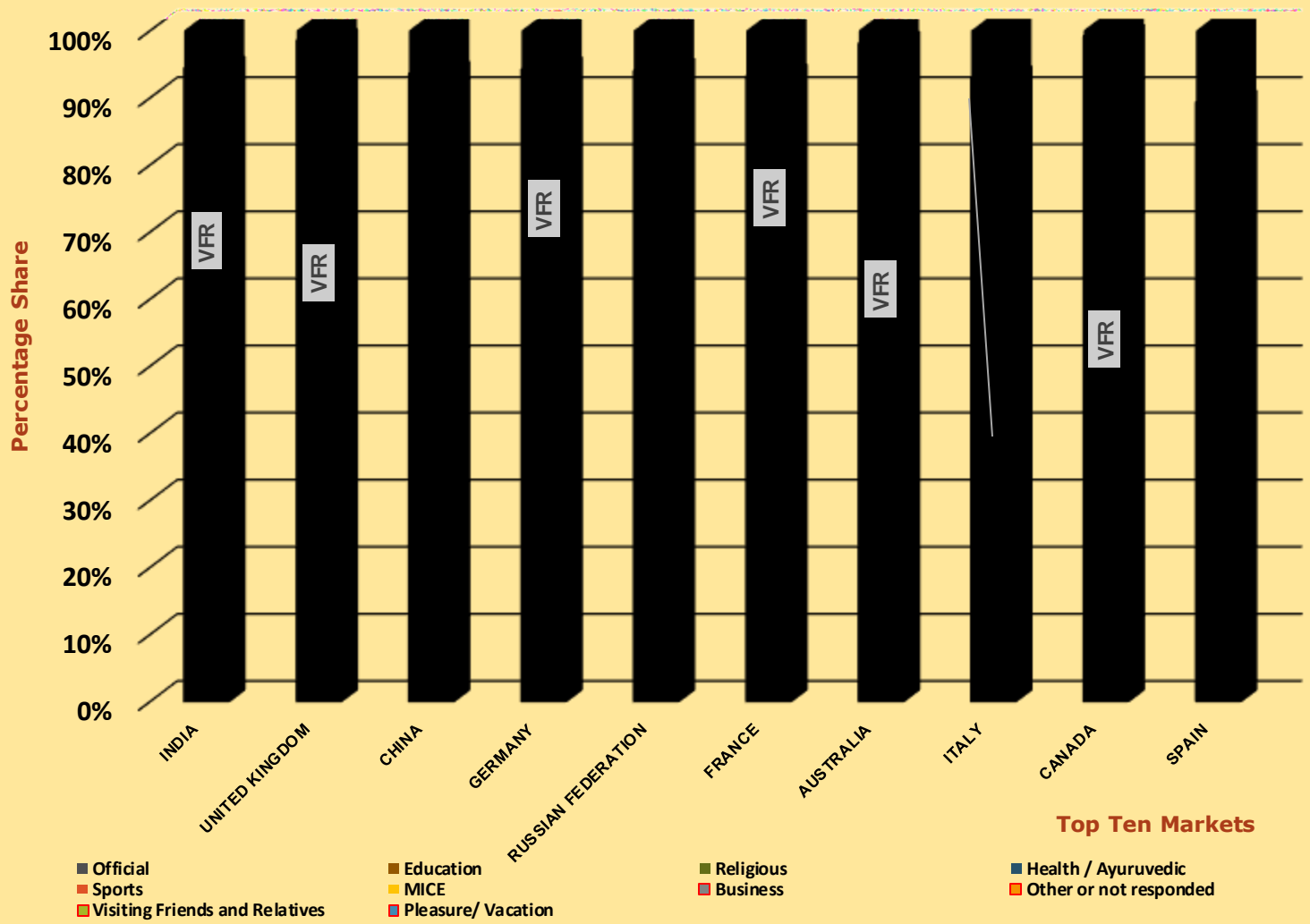




Chart 5 : Purpose of visit vs main source markets





International tourist arrivals by country of residence

	August 2023			Tourist Arrivals August 2022	% Change August (23/22) 2023	Total Tourist Arrivals up to August 2023	Total Tourist Arrivals up to August 2022	% Change up to August (23/22)
	By Air	By Sea	Total					
AMERICAS	8,166	40	8,206	3,793	116.35	64,915	34,866	86.18
North America	7,847	40	7,887	3,701	113.10	62,281	33,510	85.86
Canada	4,734	1	4,735	2,581	83.46	32,898	19,056	72.64
Mexico	45	0	45	15	200.00	390	195	100.00
United States	3,068	39	3,107	1,105	181.18	28,993	14,259	103.33
Carribean & Central America	60	0	60	18	233.33	419	212	97.64
Costa Rica	2	0	2	2	-	33	31	6.45
Jamaica	7	0	7	1	-	32	10	220.00
Others	51	0	51	15	240.00	354	171	107.02
South America	259	0	259	74	250.00	2,215	1,144	93.62
Argentina	52	0	52	4	-	473	152	211.18
Brazil	77	0	77	32	140.63	808	454	77.97
Chile	28	0	28	4	-	273	117	133.33
Colombia	52	0	52	20	160.00	325	226	43.81
Others	50	0	50	14	257.14	336	195	72.31
AFRICA	1,060	1	1,061	189	461.38	5,646	3,152	79.12
North Africa	252	0	252	69	265.22	1,676	1,333	25.73
Morocco	82	0	82	28	192.86	497	314	58.28
Sudan	88	0	88	21	319.05	552	639	(13.62)
Others	82	0	82	20	310.00	627	380	65.00
Sub-Saharan Africa	808	1	809	120	574.17	3,970	1,819	118.25
Kenya	106	0	106	9	-	375	138	171.74
Mauritius	23	0	23	3	-	186	61	204.92
Nigeria	7	0	7	1	-	53	18	194.44
South Africa	338	0	338	51	-	1,852	1,027	80.33
Others	334	1	335	56	-	1,504	575	161.57



	August 2023			Tourist Arrivals August 2022	% Change August (23/22)	Total Tourist Arrivals up to August 2023	Total Tourist Arrivals up to August 2022	% Change up to August (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	56,162	3,844	60,006	10,582	467.06	338,622	132,073	156.39
North East Asia	13,151	0	13,151	957	-	57,193	5,002	-
China	9,262	0	9,262	534	-	39,186	2,384	-
Japan	2,604	0	2,604	294	-	11,029	1,458	656.45
South Korea	666	0	666	111	-	4,214	935	350.70
Taiwan	611	0	611	17	-	2,695	181	-
Others	8	0	8	1	-	69	44	56.82
South East Asia	3,875	5	3,880	637	509.11	21,930	6,718	226.44
Cambodia	9	0	09	3	200.00	353	74	377.03
Indonesia	208	0	208	36	-	1,418	507	179.68
Malaysia	1,203	4	1,207	135	-	6,360	1,439	341.97
Myanmar	355	0	355	10	-	779	153	409.15
Philippines	468	0	468	125	274.40	2,774	1,299	113.55
Singapore	903	1	904	182	396.70	5,451	2,059	164.74
Thailand	480	0	480	97	394.85	3,185	833	282.35
Vietnam	238	0	238	46	417.39	1,503	331	354.08
Others	11	0	11	3	266.67	107	23	365.22
Oceania	6,128	5	6,133	2,069	196.42	42,514	20,007	112.50
Australia	5,518	4	5,522	1,898	190.94	37,743	18,412	104.99
New Zealand	574	1	575	166	246.39	4,612	1,557	196.21
Others	36	0	36	5	-	159	38	318.42
South Asia	33,008	3,834	36,842	6,919	432.48	216,985	100,346	116.24
Afghanistan	41	0	41	0	-	114	21	442.86
Bangladesh	1,533	0	1,533	168	-	8,090	1,889	328.27
Bhutan	60	0	60	30	100.00	261	86	203.49
India	26,759	3,834	30,593	5,340	472.90	170,247	80,132	112.46
Iran	279	0	279	88	217.05	6,516	3,329	95.73
Maldives	2,596	0	2,596	957	171.26	22,791	10,553	115.97
Nepal	476	0	476	50	-	2,646	621	326.09
Pakistan	1,264	0	1,264	286	341.96	6,320	3,715	70.12
EUROPE	63,822	26	63,848	22,373	185.38	475,227	313,051	51.80
Northern Europe	16,814	17	16,831	7,551	122.90	105,505	83,608	26.19
Denmark	552	0	552	235	134.89	7,114	5,986	18.84
Finland	61	0	61	40	52.50	1,133	1,158	(2.16)
Norway	481	0	481	295	63.05	6,149	4,736	29.84
Sweden	317	0	317	124	155.65	4,633	3,431	35.03
United Kingdom	15,018	17	15,035	6,776	121.89	83,339	65,655	26.93
Others	385	0	385	81	375.31	3,137	2,642	18.74



	August 2023			Tourist Arrivals August 2022	% Change August (23/22)	Total Tourist Arrivals up to August 2023	Total Tourist Arrivals up to August 2022	% Change up to August (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
Western Europe	21,878	6	21,884	8,450	158.98	150,958	96,743	56.04
Austria	866	0	866	206	320.39	5,995	4,107	45.97
Belgium	1,330	0	1,330	475	180.00	7,176	4,783	50.03
France	6,221	2	6,223	2,784	123.53	41,243	28,235	46.07
Germany	8,471	1	8,472	3,251	160.60	61,682	40,359	52.83
Netherlands	3,426	3	3,429	1,021	235.85	18,720	9,350	100.21
Switzerland	1,483	0	1,483	695	113.38	15,686	9,708	61.58
Others	81	0	81	18	350.00	456	201	126.87
Central/ Eastern Europe	10,497	2	10,499	2,302	356.08	166,505	107,693	54.61
Belarus	497	0	497	46	-	6,293	2,386	163.75
Czech Republic	525	0	525	95	-	6,123	6,263	(2.24)
Estonia	26	0	26	2	-	727	771	(5.71)
Hungary	166	0	166	17	-	1,933	1,791	7.93
Kazakhstan	75	0	75	13	-	2,281	7,657	(70.21)
Lithuania	91	0	91	29	213.79	1,497	1,682	(11.00)
Poland	1,029	0	1,029	261	294.25	8,369	13,334	(37.24)
Romania	304	0	304	117	159.83	2,156	2,573	(16.21)
Russia	6,853	0	6,853	1,426	380.58	125,137	49,747	151.55
Slovakia	227	0	227	50	354.00	2,733	1,902	43.69
Ukraine	181	2	183	68	169.12	3,023	13,908	(78.26)
Others	523	0	523	178	193.82	6,233	5,679	9.76
Southern/ Mediterranean Europe	14,633	1	14,634	4,070	259.56	52,259	25,007	108.98
Greece	307	0	307	49	-	1,099	605	81.65
Italy	5,110	0	5,110	937	-	14,967	4,792	212.33
Portugal	367	1	368	113	225.66	2,269	1,390	63.24
Spain	4,455	0	4,455	2,148	107.40	13,663	9,266	47.45
Turkey	262	0	262	42	-	2,053	1,028	99.71
Israel	3,396	0	3,396	643	-	14,287	5,938	140.60
Others	736	0	736	138	-	3,921	1,988	97.23
MIDDLE EAST	3,284	0	3,284	823	299.03	19,908	13,288	49.82
Bahrain	176	0	176	22	-	940	361	160.39
Egypt	239	0	239	41	-	1,817	1,757	3.41
Iraq	103	0	103	59	74.58	649	867	(25.14)
Jordan	389	0	389	154	152.60	2,688	1,634	64.50
Kuwait	293	0	293	53	-	1,507	714	111.06
Lebanon	250	0	250	58	-	2,132	1,105	92.94
Oman	386	0	386	55	-	1,657	551	200.73
Qatar	134	0	134	9	-	692	190	264.21
Saudi Arabia	708	0	708	220	-	5,011	4,827	3.81
United Arab Emirates	379	0	379	110	-	2,037	890	128.88
Others	227	0	227	42	-	778	392	98.47
TOTAL	132,494	3,911	136,405	37,760	261.24	904,318	496,430	82.16

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

When examining the departure airports and preferred airlines for tourists in Sri Lanka, the significance of air travel to the country's tourism industry becomes evident. According to the data in Chart 6, approximately 40% of tourists chose airports in Doha, Dubai, and Chennai as their departure points. Furthermore, the most popular airlines among tourists arriving in Sri Lanka were Sri Lankan Airlines, Qatar Airways and Emirates, collectively serving 59% of the total tourist arrivals. This underscores the importance of air transport in facilitating tourism in Sri Lanka, with specific departure airports and airlines playing a pivotal role in accommodating a significant portion of tourists.

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

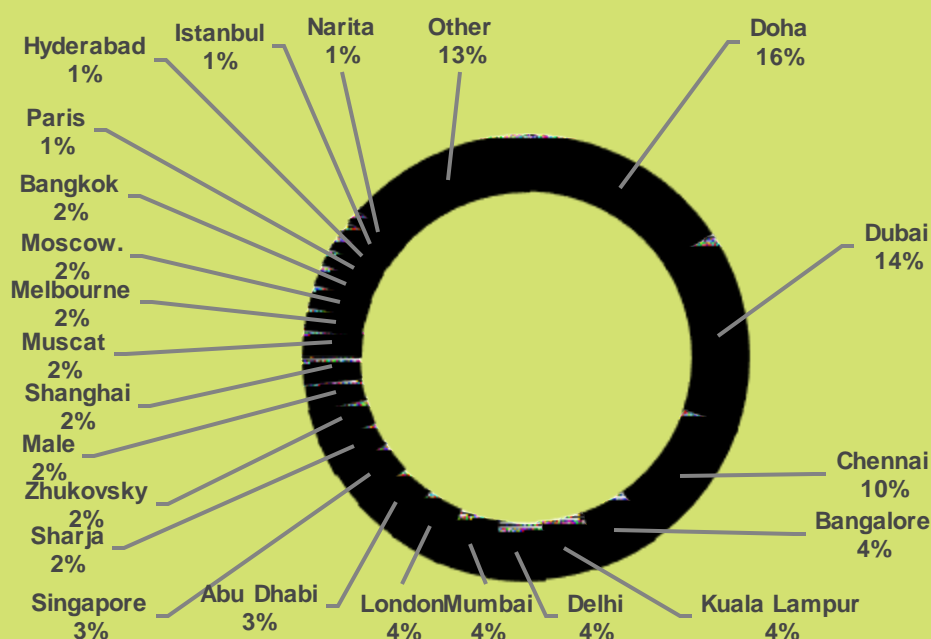
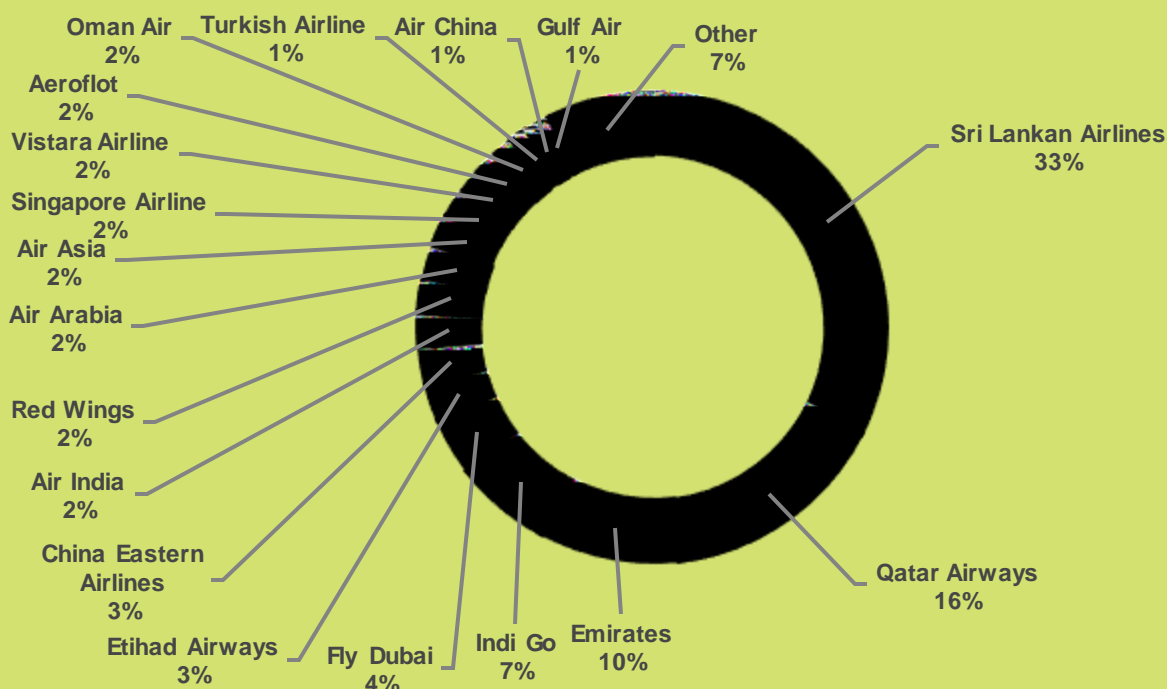


Chart 7. Main airlines to Sri Lanka, August 2023





August 2023

This information highlights how the preferences of tourists regarding airlines and departure airports are influenced by their home countries and emphasizes the importance of convenient connections in attracting tourists to Sri Lanka.

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



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