



Monthly Tourist Arrivals Report:

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

June 2022

Sri Lanka Tourism Development Authority



Introduction

The following document provides a synthesis of the most recent June, 2022 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 30th June 2022, 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

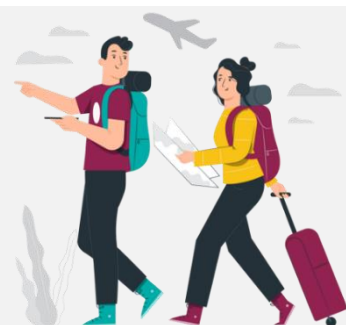
The total number of international tourist arrivals to Sri Lanka during June 2022 was 32,856. Tourist arrivals for the month of June have plunged by almost 69%, in comparison to March 2022, which recorded the highest number of tourist arrivals up to June, 2022. This could be a result of the effects of the current economic and political

situation in Sri Lanka, and the gradual cessation of the peak travel season.

As of 30th June 2022, 411,377 international tourists had visited Sri Lanka for this year. The largest source markets recorded for the month of June were India, the United Kingdom, Australia, followed by Germany and Canada.

Table 1. Monthly tourist arrivals, June 2022

Month	2018	2021	2022	% change 2022/21	% change 2022/18
January	238,924	1,682	82,327	4,794.6	(65.5)
February	235,618	3,366	96,507	2,767.1	(59.0)
March	233,282	4,581	106,500	2,224.8	(54.3)
April	180,429	4,168	62,980	1,411.4	(65.1)
May	129,466	1,497	30,207	1,917.8	(76.7)
June	146,828	1,614	32,856	1,935.7	(77.6)
July	217,829	2,429	-	-	
August	200,359	5,040	-	-	
September	149,087	13,547	-	-	
October	153,123	22,771	-	-	
November	195,582	44,294	-	-	
December	253,169	89,506	-	-	
TOTAL	2,333,796	194,495	411,377		



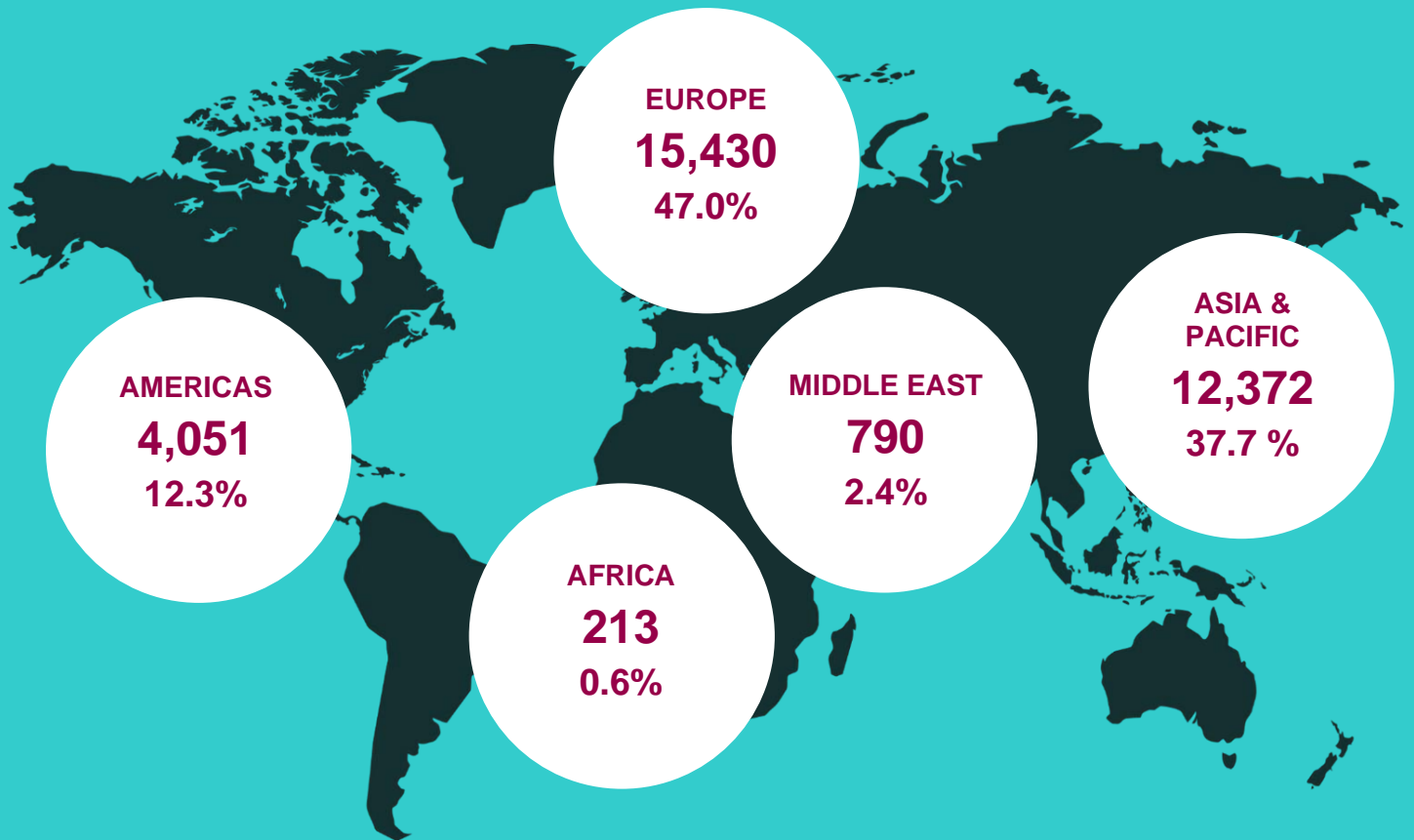
Tourist Arrivals | June 2022

32,856



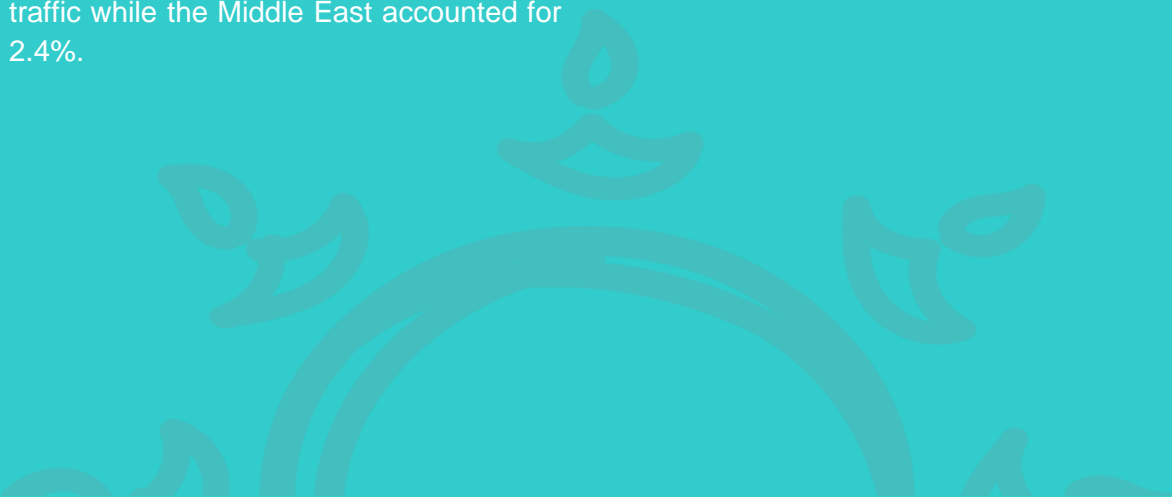
Tourist arrivals by region and percentage share June 2022

Map 1. Tourist arrivals by region and percentage share



Europe became the largest source of tourist traffic to Sri Lanka with 47% of the total traffic received in June 2022. Pent up demand especially from countries such as the United Kingdom, Germany and France is likely to have driven this growth momentum. Asia and the Pacific accounted for 37.7% of total arrivals. The Americas accounted for 12.3% of the total traffic while the Middle East accounted for 2.4%.

The gradual improvement in international travel was once again threatened by external factors such as the Russian invasion of Ukraine, coupled with the related challenging economic environment, and internal factors such as the economic crisis in Sri Lanka undermining consumer confidence, which was gradually building up.





Top primary markets and top potential markets

June 2022

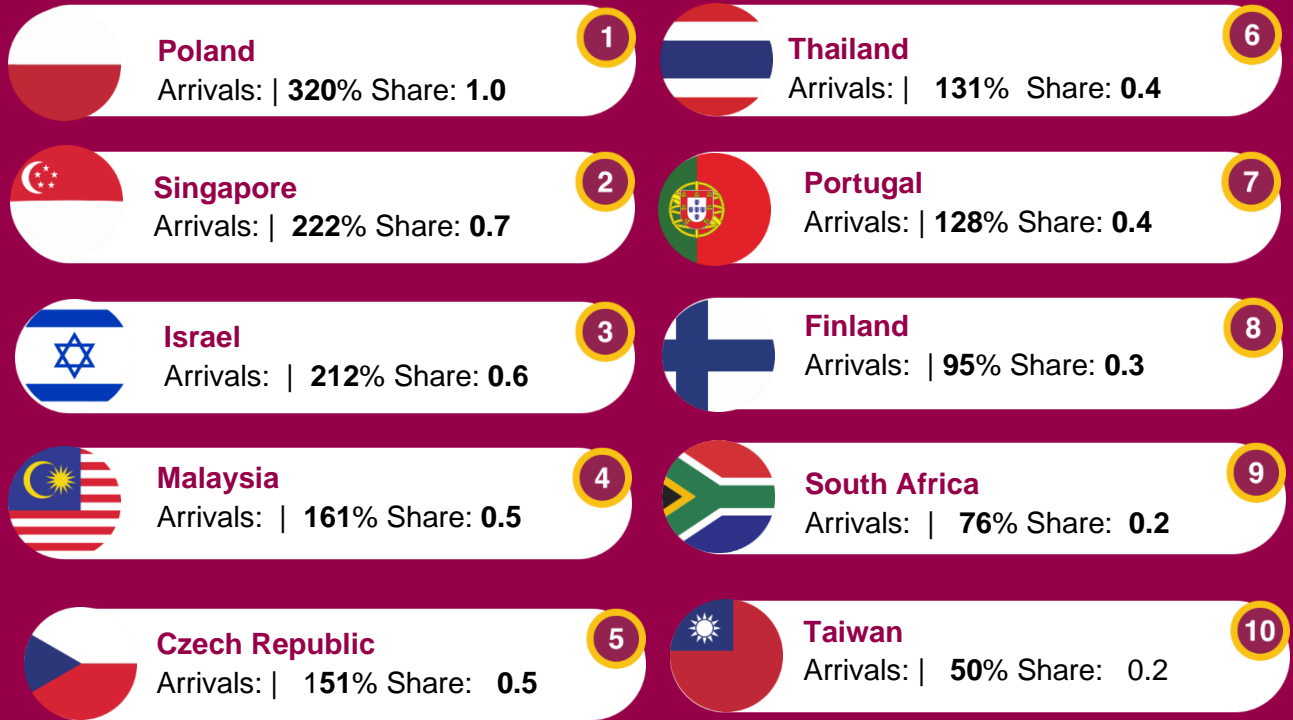
Top primary markets



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).



Top Potential markets



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).



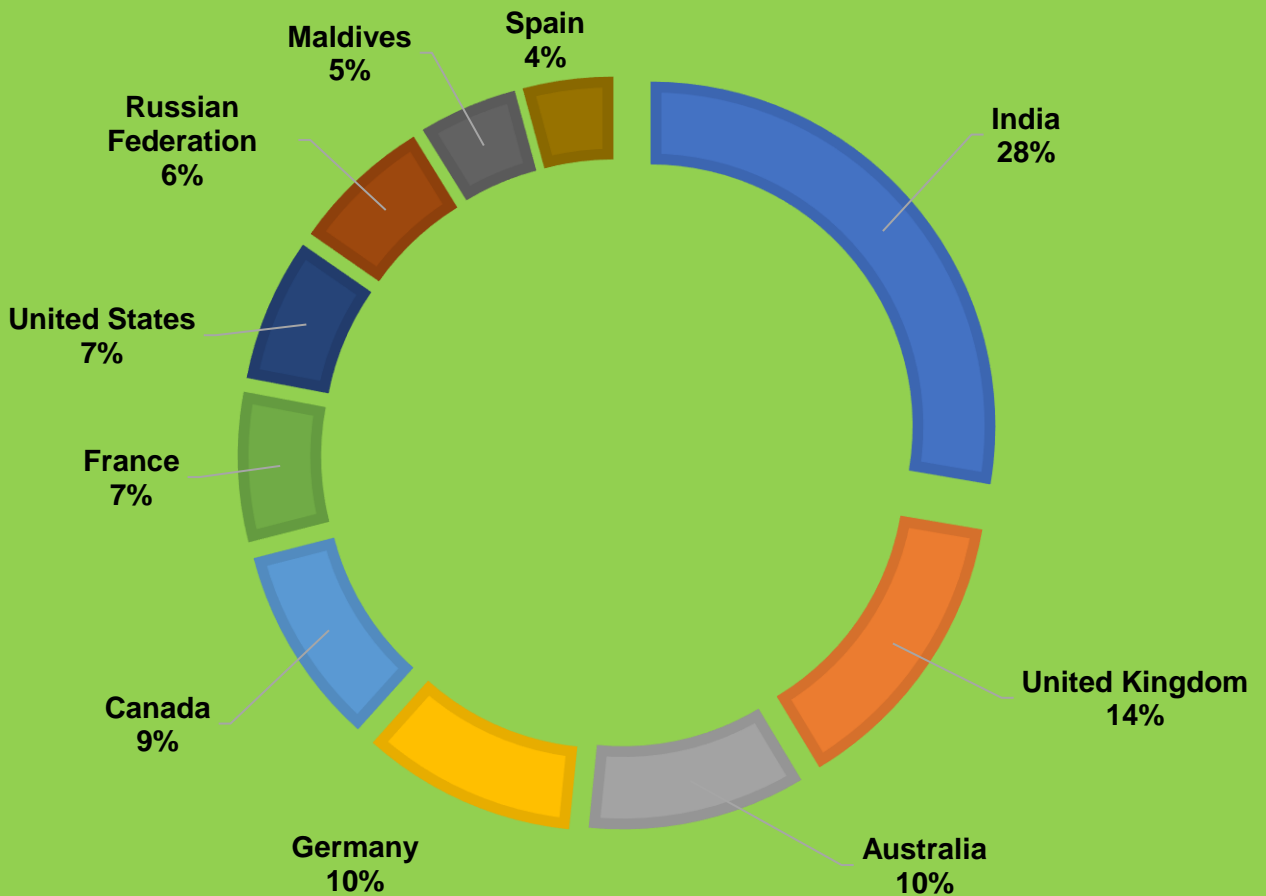
Top ten source markets

June 2022

India, the United Kingdom, Australia, Germany, and Canada were Sri Lanka's top five international tourist generating markets for the month of June this year. India was the largest source of tourist visits to Sri Lanka with 28% of the total traffic received in June. The United Kingdom and Australia accounted for 14% and 10% of the total traffic respectively while Germany and Canada accounted for 10% & 9%. The

advisories against travel to Sri Lanka by major source markets such as the United Kingdom, Germany and France due to political and economic unrest in Sri Lanka, could be the likely reasons for this decline. Further the rising inflation in the European region due to the war in Ukraine too could have detrimental effects on tourism in Sri Lanka.

Chart 1. Top ten source markets to Sri Lanka, June 2022



**Table 2. Top ten source markets to Sri Lanka, June 2022**

Rank	Country of Residence	Tourist Arrivals (June 2022)			Tourist Arrivals (June 2021)
		By Air	By Sea	Total	
1	India	6,810	-	6,810	5
2	United Kingdom	3,368	-	3,368	121
3	Australia	2,511	-	2,511	13
4	Germany	2,466	-	2,466	137
5	Canada	2,308	-	2,308	67
6	France	1,717	-	1,717	654
7	United States	1,647	-	1,647	118
8	Russian Federation	1,610	-	1,610	33
9	Maldives	1,130	-	1,130	22
10	Spain	1,027	-	1,027	10

Top ten source markets, January to June 2022

India, the United Kingdom, Russian Federation, Germany and France were Sri Lanka's top five international tourist-generating markets from January to June this year.

Table 3. Top ten markets to Sri Lanka, January to June 2021 & 2022 and percentage change

Rank	Country of Residence	Tourist Arrivals (Jan ~ June 2022)	Tourist Arrivals (Jan ~ June 2021)
1	India	68,761	1,119
2	United Kingdom	49,622	1,002
3	Russian Federation	46,403	636
4	Germany	33,442	1,508
5	France	21,884	881
6	Australia	14,540	163
7	Ukraine	13,782	2,666
8	Canada	13,017	488
9	Poland	12,729	93
10	United States	11,685	786
11	Other	125,512	7,566
	Total	411,377	16,908



Chart 2. Top ten source markets to Sri Lanka, January to June 2022

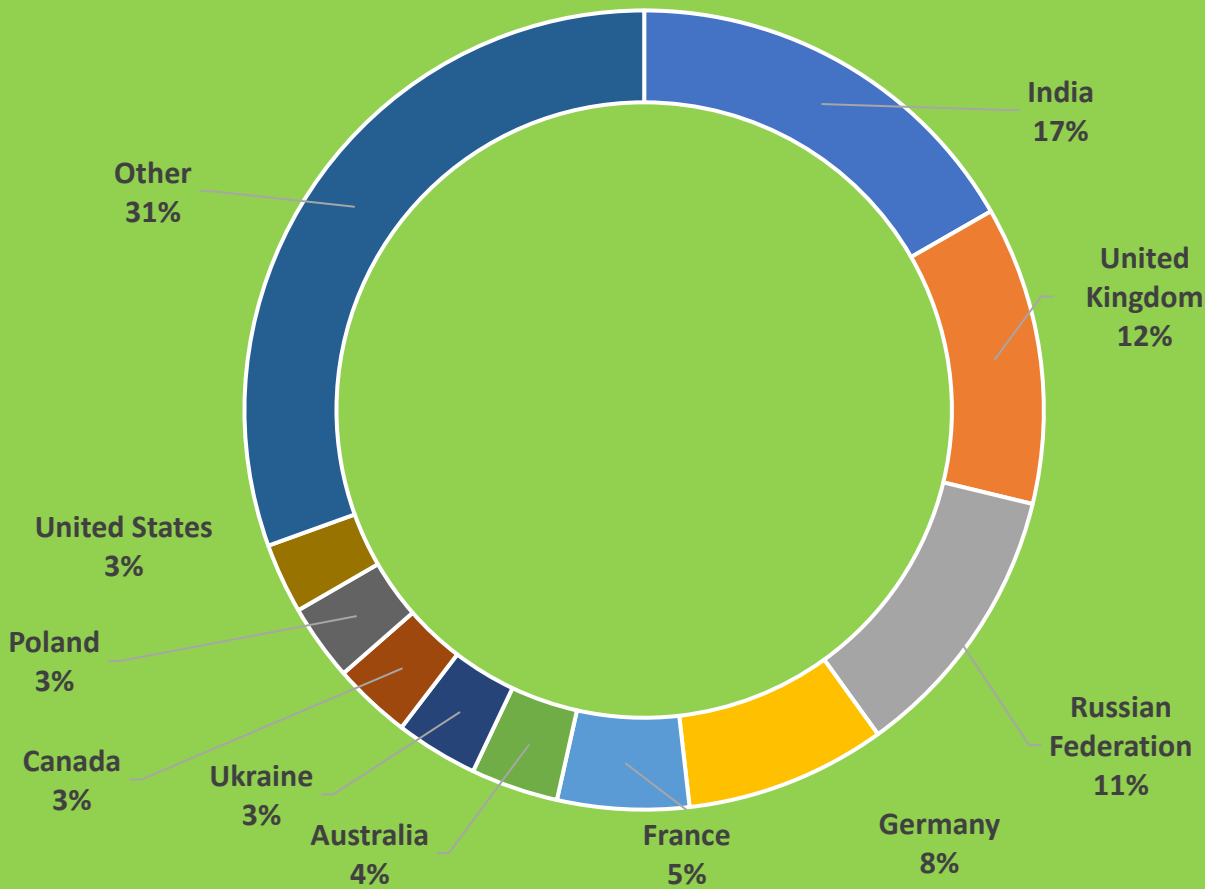
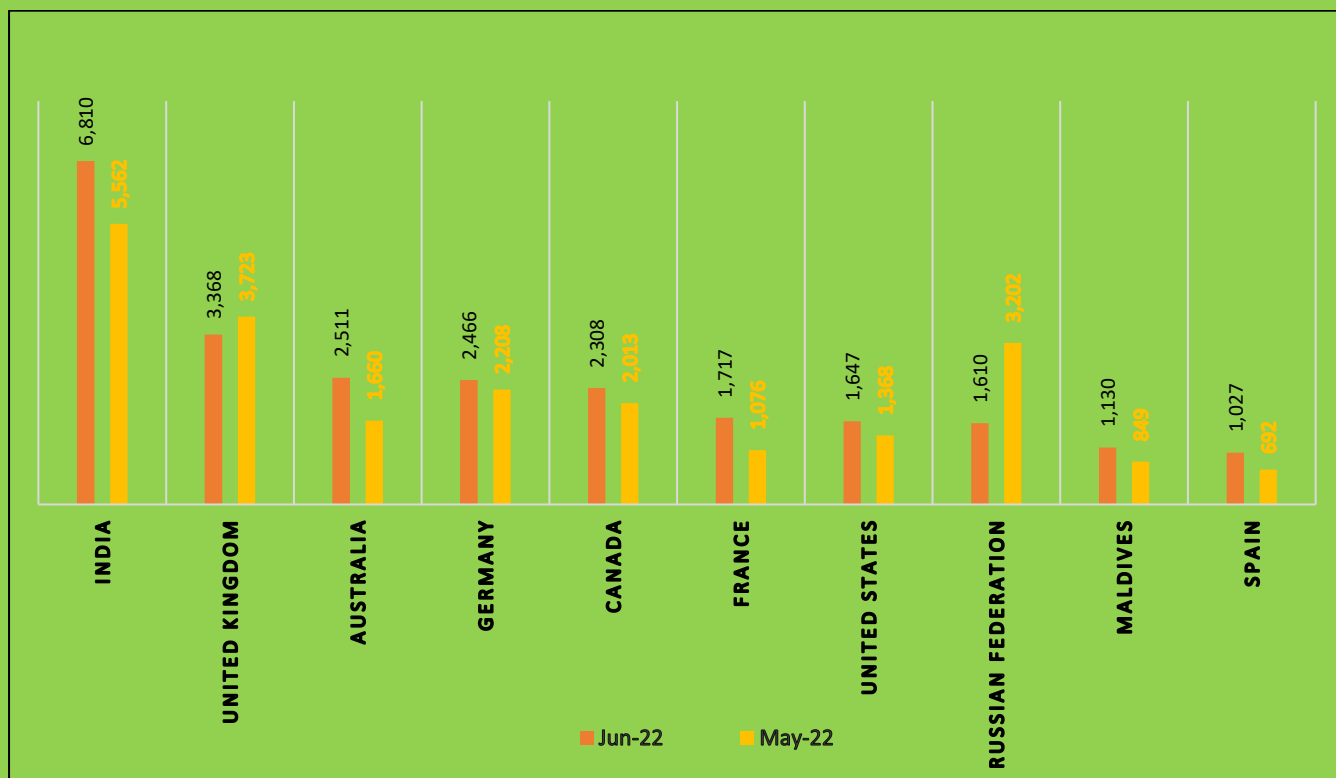


Chart 3. Comparison of arrivals from top ten markets to Sri Lanka, May 2022/ June 2022



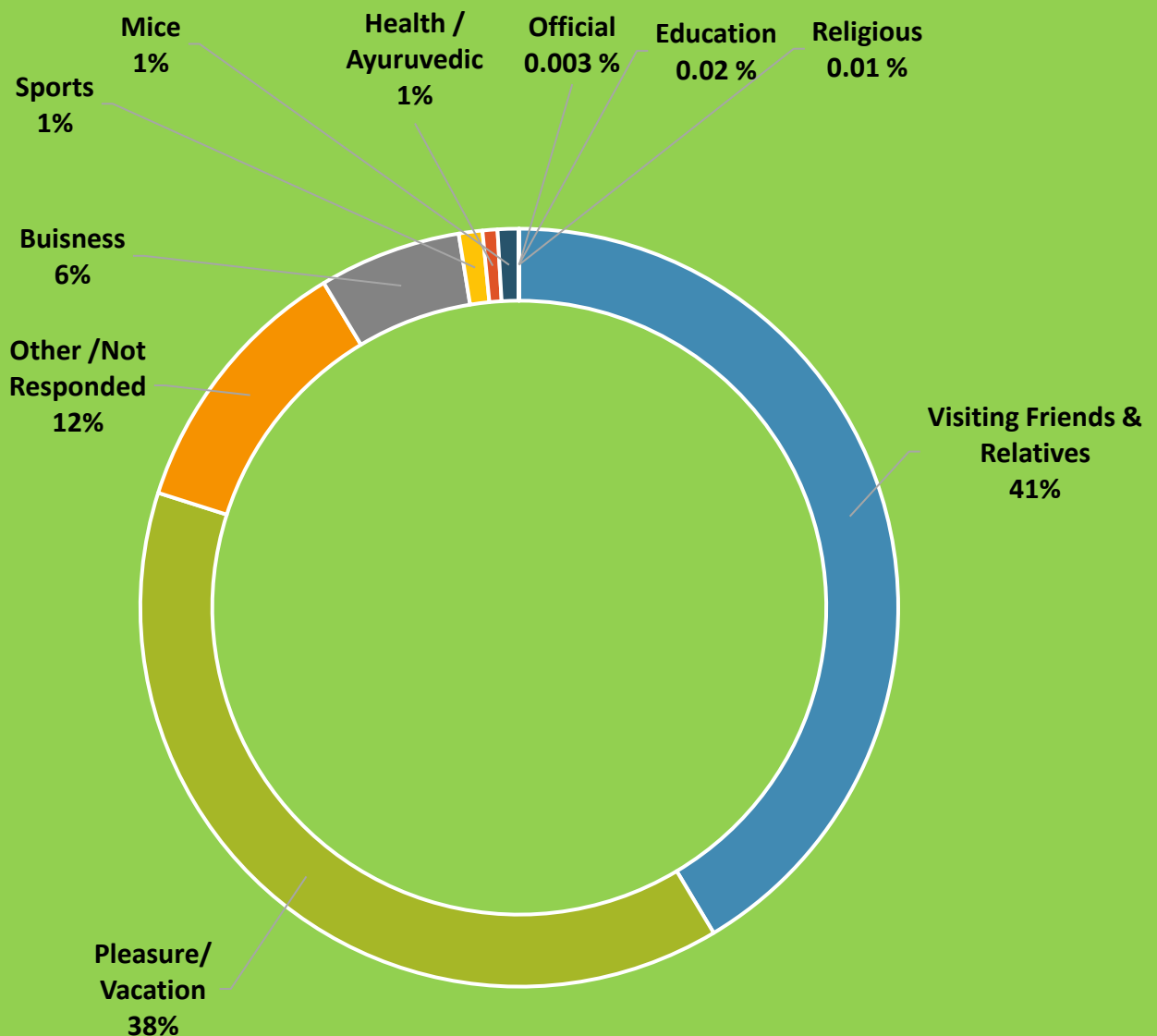


Tourist arrivals by purpose of visit

June 2022

An analysis of tourist arrivals by purpose of visit reveals that a majority (41%) of tourists had visited Sri Lanka for visiting friends and relatives, while for 38% of tourists the main purpose was pleasure/vacation. In comparison to April 2022, the tourists who had visited Sri Lanka for pleasure/vacation purposes had decreased while tourists who had come for VFR purposes had increased. The reason could be the expatriates who are visiting their friends & relatives as 83% of arrivals from Canada and 61% of arrivals from Australia were for the purpose of VFR. Only 6% of tourists had visited for business related purposes. 1% had visited for health related purposes, while 1% and 0.02% had visited for purposes such as sports and education.

Chart 4. Tourist arrivals by purpose of visit, June 2022



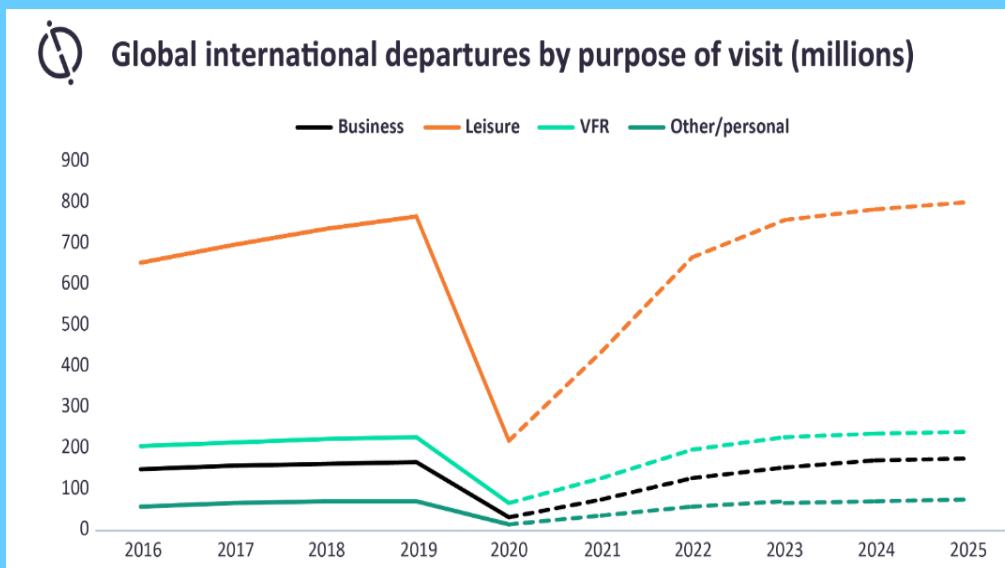
Targeting VFR segment as a viable source for Sri Lanka Tourism

Visiting friends and relatives (VFR) has become an important and unique segment of the inbound visitor economy over recent years and has been identified as a segment with many economic benefits and with great potential worldwide though they have been underestimated compared to pleasure market.

As revealed in many research studies there are several different reasons for the growth in the visiting friends and relatives market around the world. This includes globalization, a growing expat population, migration, freedom of movement, education and the desire to travel. (Tourism Teacher,2020) The VFR market offers a useful range of additional benefits for destinations looking to grow their visitor economy in a sustainable way (DMS,n.d).

1. They are more willing to travel outside of peak season, making them a perfect audience for any destination looking to 'top-up' their visitor numbers in the low or shoulder seasons. Balancing out business opportunities, year-round.
2. They tend to stay longer than other visitors: 60% stay for seven days or longer (Source: My Travel Research).
3. They are more likely to be repeat visitors; making, on average, between two to three VFR-related visits every year (Source: Elisa Backer and Brian King).
4. For a variety of reasons, the VFR market are frequent users of commercial accommodation.

As per the forecasts of Global Data, visiting friends and relatives (VFR) travel will experience higher growth, with a 17% compound annual growth rate (CAGR) between 2021-25, compared to leisure, growing at a 16.4% increase between the same time period.



Source: Global Data

As pointed out by Shankman (2013) Visiting friends and relatives is the primary reason for travel for 20 percent of travellers in Asia. This segment is becoming more important as immigrant and expat communities grow in Asia Pacific destinations. In her analysis of VFR travel to India from Australia Shankman revealed that it is an important segment with a contribution of 43% and is becoming a emerging traveller type that will define the future of the industry.

Similarly Visiting friends and relatives travel can be considered as a significant market segment for Sri Lanka Tourism as vividly depicted in the arrival data since the month of May.

Chart 1: Daily tourist arrivals, 1st January – 30th June 2022

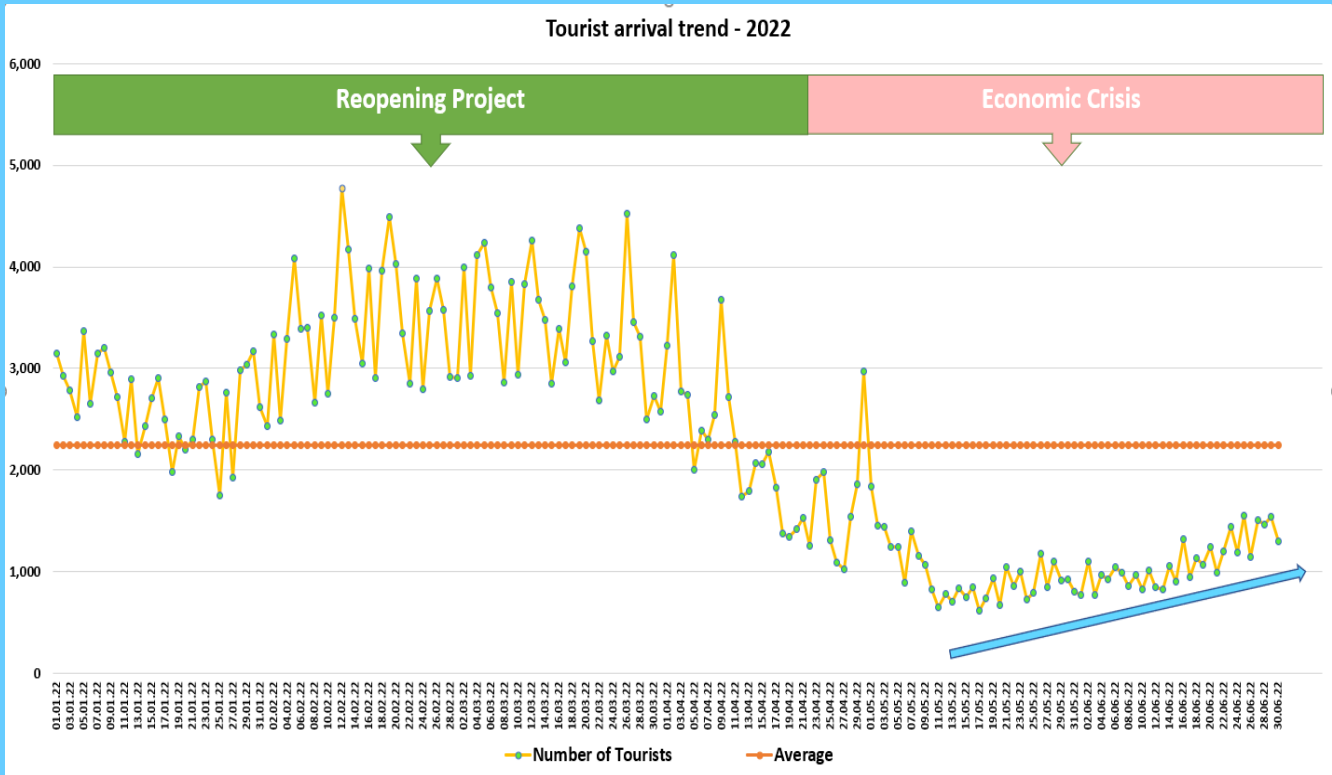


Chart 2: Daily arrivals, 1st - 30th June

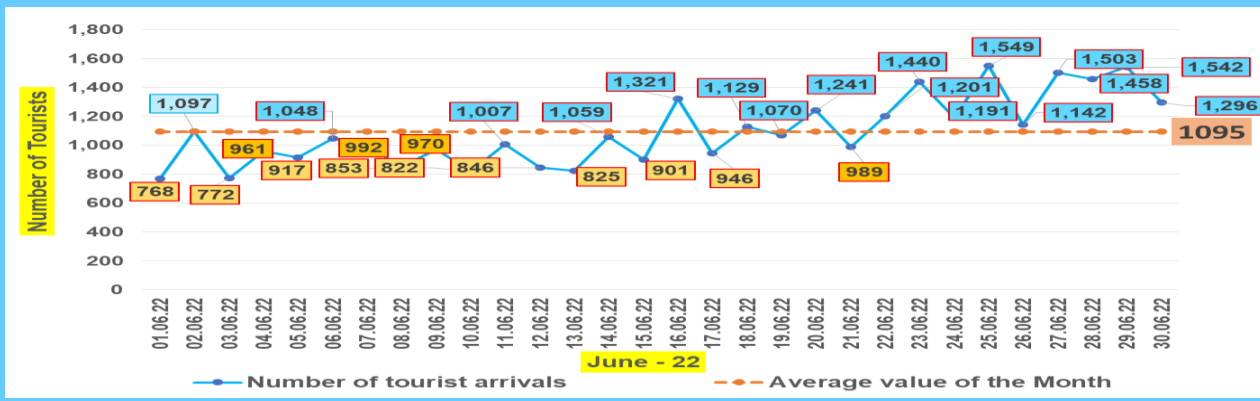


Chart 3: Tourist arrivals for VFR purposes, May & June

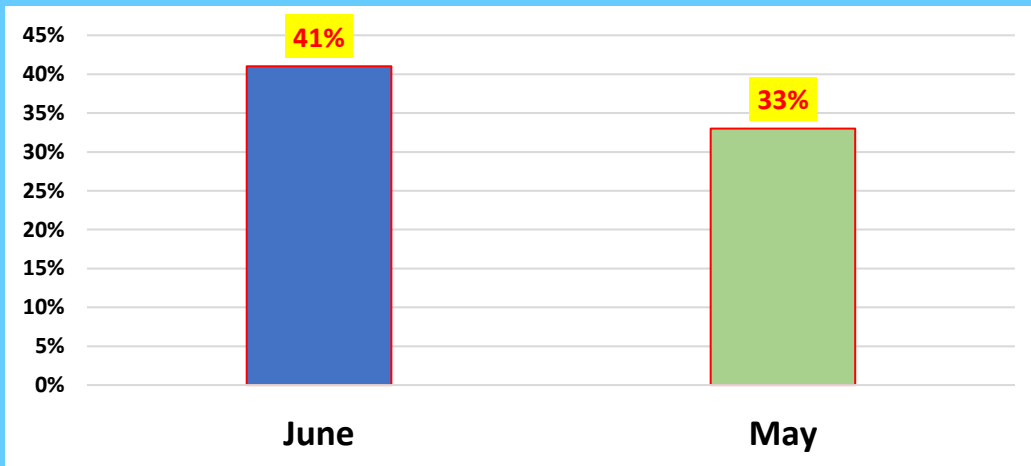
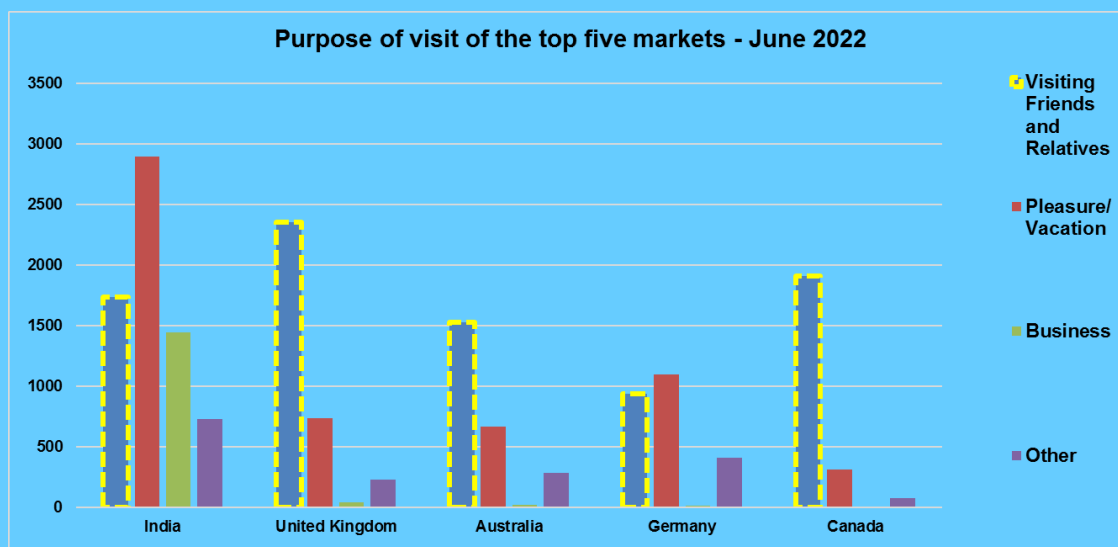


Chart 4: Tourist arrivals for VFR purposes from top source markets, June



The above chart 1 clearly shows the gradual decline experienced in arrivals in the month of April with the onset of the economic crisis and its related conditions. However, a gradual increase and a stabilisation in tourists arrivals was evident since the mid May and this could be owing to the temporary political stabilization and related conditions that created somewhat favourable environment. Thus, unlike in previous months the majority of these tourist arrivals did not constitute pleasure travellers, yet it constituted travellers who visited for VFR purposes.

As depicted in the chart 3 & 4, out of total arrivals in the month of June, the VFR constituted 41.4% while arrivals from the United Kingdom, Australia and Canada constituted 70%, 61% and 83% VFR arrivals respectively. India recorded 25.5% VFR arrivals while Germany recorded 38%.

The motive behind VFR travellers is created by a strong feeling to reconnect with their families and reaffirm their roots in their hometowns. Especially after a prolonged period of separation due to the pandemic, the need to reconnect with their families and friends have become stronger than ever before. Even though platforms such as Zoom, Facebook, Wats App bridged the gap virtually, the need to join physically with the loved ones have created a strong demand for VFR travel.

When it comes to inbound VFR travel to Sri Lanka, the factors such as the easing of travel restrictions such as the elimination of PCR tests and the mandatory travel insurance could be the motivating factors for this segment to visit their relatives and friends in Sri Lanka. Given the current political and economic crisis in Sri Lanka, VFR travel could be a viable market segment for forex crisis too. Unlike pleasure travellers, the VFR travellers are much familiar with the country and equipped with the knowledge to involve in tourism related activities even during a difficult situation. Therefore, focusing on VFR segment as a source of tourism would be an ideal contemporary solution.

As per the findings of Nielsen Global Trust, 83% (qtd. in Global Data) of consumers trust recommendations from friends and family more than any other form of marketing. Given the nature of forex crisis currently faced in Sri Lanka activating the VFR market leverages the most powerful marketing tool available: Word of Mouth (WOM), which is free of charge. Further, research also provided strong evidence that the VFR market is less affected by seasonality and external threats than other segments. Thus, in an off-peak season starting from May to October, VFR segment could be an ideal segment for a destination like Sri Lanka to target. With the travel advisories issued by main source markets like the United Kingdom and others, VFR segment could be the only resilient segment under the given social and economic conditions in Sri Lanka.

Thus encouraging higher rates of visitation from the VFR segment, especially for a destination like Sri Lanka could be a timely solution. Bonhill-Smith (qtd. in Global Data) points out that destinations can issue special visas or requirements that will make it easier for families to reunite. Airlines can ensure popular VFR routes are some of the first to be restored, hospitality businesses and attraction operators could offer incentives and discounts for families. All industries across the travel sector could be better informed to have a greater understanding of this tourism market. Thus, given the dire situation currently encountered by the Sri Lanka Tourism, encouraging higher rates of visitation of VFR travel through the adoption of above strategies could be the most timely strategy to ensure the wellbeing of the industry.

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Shankman, S.,2013., The five emerging traveller types that will define the future of the industry, Skift, Accessed on 4th July 2022< <https://skift.com/2013/02/02/five-emerging-traveler-types-that-will-define-the-future-of-the-industry/>>



International tourist arrivals by country of residence

	June 2022			Tourist Arrivals June 2021	% Change June (22/21)	Total Tourist Arrivals up to June 2022	Total Tourist Arrivals up to June 2021	% Change up to June (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
AMERICAS	4,051	-	4,051	188	-	26,047	1,334	-
North America	3,967	-	3,967	186	-	24,864	1,281	-
Canada	2,308	-	2,308	67	-	13,017	488	-
Mexico	12	-	12	1	-	162	7	-
United States	1,647	-	1,647	118	-	11,685	786	-
Carribbean & Central America	16	-	16	0	-	177	14	-
Costa Rica	1	-	1	0	-	29	0	-
Jamaica	1	-	1	0	-	9	1	-
Others	14	-	14	0	-	139	13	-
South America	68	-	68	2	-	1,006	39	-
Argentina	7	-	7	0	-	140	6	-
Brazil	27	-	27	1	-	388	15	-
Chile	5	-	5	0	-	106	1	-
Colombia	12	-	12	1	-	198	13	-
Others	17	-	17	0	-	174	4	-
AFRICA	213	-	213	5	-	2,736	106	-
North Africa	69	-	69	1	-	1,158	7	-
Morocco	20	-	20	1	-	267	4	-
Sudan	21	-	21	0	-	553	2	-
Others	28	-	28	0	-	338	1	-
Sub-Saharan Africa	144	-	144	4	-	1,578	99	-
Kenya	12	-	12	0	-	124	2	-
Mauritius	2	-	2	0	-	51	3	-
Nigeria	0	-	0	0	-	16	2	-
South Africa	76	-	76	2	-	921	66	-
Others	54	-	54	2	-	466	26	-



	June 2022			Tourist Arrivals June 2021	% Change June (22/21)	Total Tourist Arrivals up to June 2022	Total Tourist Arrivals up to June 2021	% Change up to June (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	12,372	-	12,372	275	-	110,412	3,254	-
North East Asia	532	-	532	187	-	3,503	1,338	-
China	231	-	231	176	-	1,584	1,255	-
Japan	148	-	148	11	-	995	60	-
South Korea	102	-	102	0	-	737	15	-
Taiwan	50	-	50	0	-	148	8	-
Others	1	-	1	0	-	39	0	-
South East Asia	713	-	713	18	-	5,487	196	-
Cambodia	2	-	2	0	-	57	1	-
Indonesia	45	-	45	9	-	441	27	-
Malaysia	161	-	161	0	-	1,181	17	-
Myanmar	11	-	11	2	-	127	15	-
Philippines	97	-	97	6	-	1,025	89	-
Singapore	222	-	222	1	-	1,721	21	-
Thailand	131	-	131	0	-	652	14	-
Vietnam	43	-	43	0	-	263	12	-
Others	1	-	1	0	-	20	0	-
Oceania	2,667	-	2,667	22	-	15,715	206	-
Australia	2,511	-	2,511	13	-	14,540	163	-
New Zealand	153	-	153	6	-	1,152	40	-
Others	3	-	3	3	-	23	3	-
South Asia	8,460	-	8,460	48	-	85,707	1,514	-
Afghanistan	0	-	0	1	-	19	4	-
Bangladesh	129	-	129	2	-	1,545	22	-
Bhutan	3	-	3	0	-	53	2	-
India	6,810	-	6,810	5	-	68,761	1,119	-
Iran	79	-	79	2	-	3,206	74	-
Maldives	1,130	-	1,130	22	-	8,389	213	-
Nepal	30	-	30	3	-	546	10	-
Pakistan	279	-	279	13	-	3,188	70	-
EUROPE	15,430	-	15,430	1,125	-	260,994	11,916	-
Northern Europe	5,223	-	5,223	169	-	65,135	1,291	-
Denmark	275	-	275	1	-	5,294	48	-
Finland	95	-	95	0	-	1,059	24	-
Norway	1,021	-	1,021	32	-	3,684	86	-
Sweden	304	-	304	14	-	3,098	71	-
United Kingdom	3,368	-	3,368	121	-	49,622	1,002	-
Others	160	-	160	1	-	2,378	60	-



	June 2022			Tourist Arrivals June 2021	% Change June (22/21)	Total Tourist Arrivals up to June 2022	Total Tourist Arrivals up to June 2021	% Change up to June (20/21)
	Tourist Arrivals							
	By Air	By Sea	Total					
Western Europe	5,644	-	5,644	849	-	75,369	2,996	-
Austria	109	-	109	8	-	3,602	111	-
Belgium	259	-	259	3	-	3,193	42	-
France	1,717	-	1,717	654	-	21,884	881	-
Germany	2,466	-	2,466	137	-	33,442	1,508	-
Netherlands	423	-	423	20	-	6,276	157	-
Switzerland	665	-	665	27	-	6,806	285	-
Others	5	-	5	0	-	166	12	-
Central/ Eastern Europe	2,530	-	2,530	68	-	102,425	7,190	-
Belarus	34	-	34	0	-	2,305	81	-
Czech Republic	151	-	151	4	-	5,951	130	-
Estonia	5	-	5	1	-	761	34	-
Hungary	47	-	47	0	-	1,732	19	-
Kazakhstan	22	-	22	0	-	7,632	3,188	-
Lithuania	32	-	32	4	-	1,601	23	-
Poland	320	-	320	2	-	12,729	93	-
Romania	46	-	46	6	-	2,392	46	-
Russia	1,610	-	1,610	33	-	46,403	636	-
Slovakia	47	-	47	6	-	1,740	93	-
Ukraine	77	-	77	9	-	13,782	2,666	-
Others	139	-	139	3	-	5,397	181	-
Southern/ Mediterranean Europe	2,033	-	2,033	39	-	18,065	439	-
Greece	16	-	16	0	-	516	10	-
Italy	506	-	506	16	-	3,205	147	-
Portugal	128	-	128	3	-	1,191	20	-
Spain	1,027	-	1,027	10	-	5,619	114	-
Turkey	57	-	57	3	-	929	42	-
Israel	212	-	212	3	-	4,891	59	-
Others	87	-	87	4	-	1,714	47	-
MIDDLE EAST	790	-	790	21	-	11,188	298	-
Bahrain	42	-	42	0	-	303	23	-
Egypt	84	-	84	0	-	1,580	23	-
Iraq	40	-	40	0	-	710	7	-
Jordan	79	-	79	17	-	1,238	81	-
Kuwait	45	-	45	0	-	583	6	-
Lebanon	71	-	71	0	-	939	115	-
Oman	35	-	35	0	-	421	1	-
Qatar	9	-	9	0	-	143	3	-
Saudi Arabia	281	-	281	4	-	4,296	13	-
United Arab Emirates	69	-	69	0	-	668	17	-
Others	35	-	35	0	-	307	9	-
TOTAL	32,856	-	32,856	1,614	-	411,377	16,908	-



Main last departure airports and airlines to Sri Lanka June 2022

An analysis of the last departure airports to Sri Lanka reveals the vital importance of air connectivity in the tourism industry. As depicted in the below Chart 5, for around 49% of tourists the last airports had been Doha, Dubai and Chennai. Further, in terms of airlines, Sri Lankan Airlines, Qatar Airways and Emirates were the top airlines, handling 72% of tourists to Sri Lanka.

Chart 5. Main last departure airports to Sri Lanka, June 2022

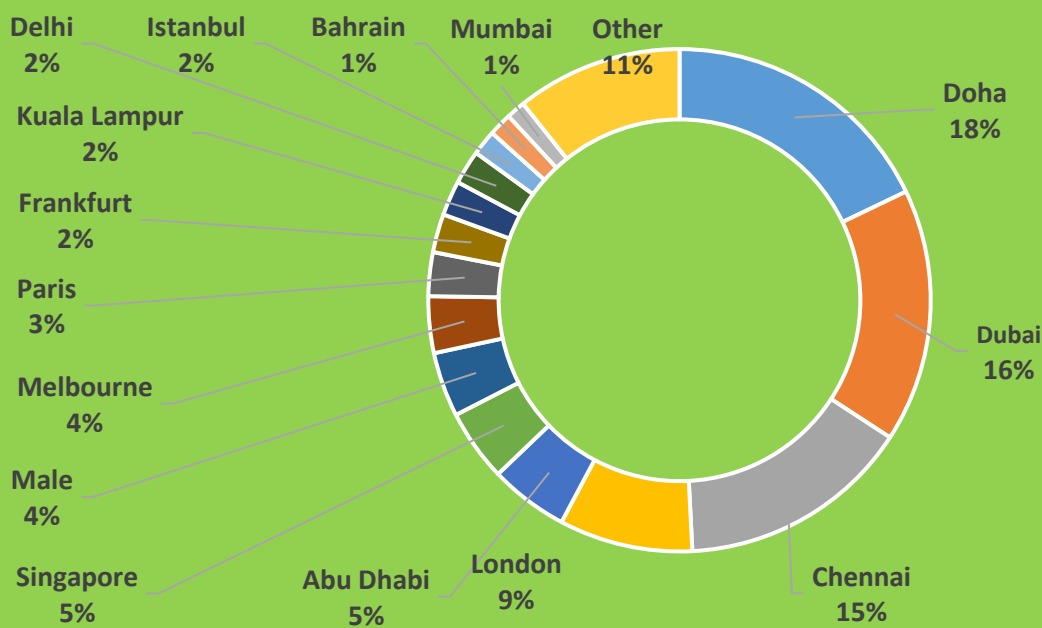
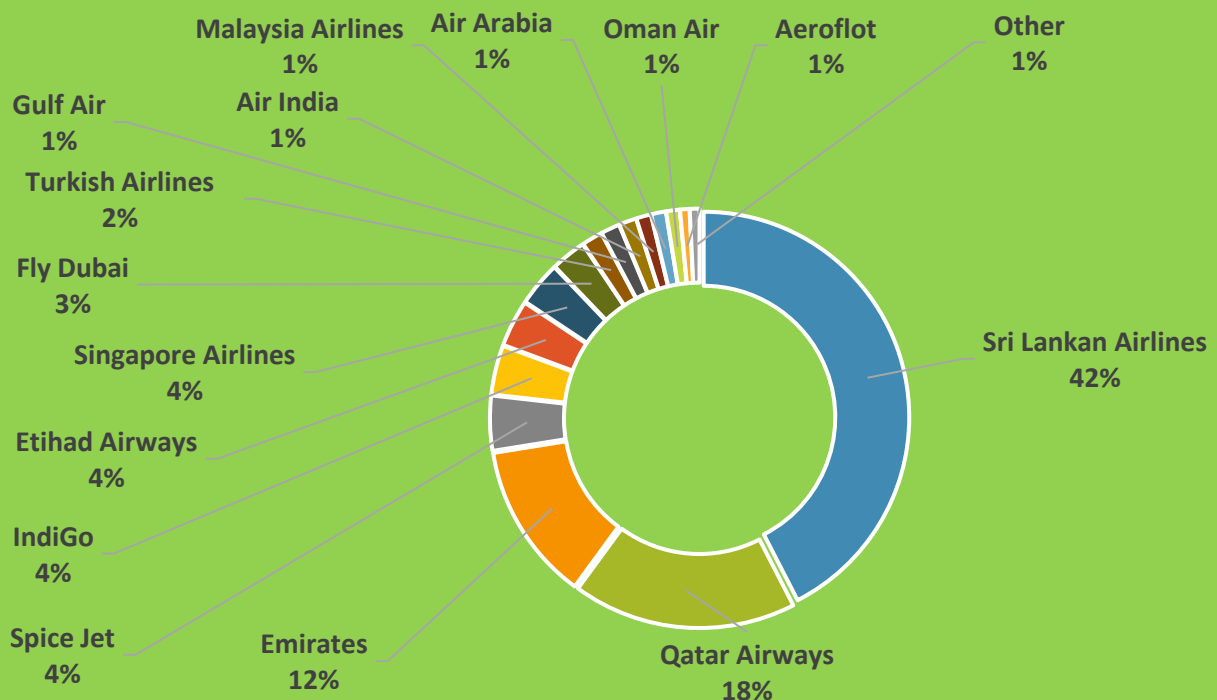


Chart 6. Main airlines to Sri Lanka, June 2022





Top ten markets versus main last departure airports and main airlines to Sri Lanka June 2022

The below tables depict the main last departure airports and airlines analyzed by top markets to Sri Lanka. Sri Lankan Airlines and Spice Jet are the most popular airlines for Indians. Fly Dubai has become the most popular airline among tourists from Russia in the absence of the Aeroflot which ceased operations after 2nd June. For majority of travellers from France and Spain, Qatar Airways is the most preferable airline and Doha is the main last departure airport. The figures further indicates that for tourists from Australia, Maldives and Germany, Sri Lankan Airlines is the most preferable Airline indicating the importance of destination accessibility in driving visitation.

Table 4. Top ten markets vs. main last departure airports to Sri Lanka, June 2022

Country	Doha	Dubai	Chennai	London	Abu Dhabi	Singapore	Male	Melbourne	Paris	Frankfurt	Kuala Lumpur	Delhi	Istanbul	Bahrain	Mumbai	Sharja	Bangalore	Muscat	Sydney	Moscow	Other	Total
India	43	131	4,519	14	20	28	36	5	2	0	22	564	2	13	316	10	309	8	5	0	763	6,810
United Kingdom	648	463	71	1,589	214	33	49	11	1	1	31	8	7	142	15	2	2	31	8	0	42	3,368
Australia	35	50	24	26	8	696	37	1,120	4	2	143	11	0	0	3	2	4	0	307	0	39	2,511
Germany	559	400	32	77	291	14	29	0	105	658	20	8	48	91	9	6	14	83	3	0	19	2,466
Canada	981	320	88	299	88	22	27	6	339	38	28	15	10	1	10	1	5	6	0	0	24	2,308
France	662	310	13	46	99	6	14	0	369	5	16	6	15	58	4	1	2	79	0	0	12	1,717
United States	443	337	45	272	100	197	61	5	18	11	31	15	17	3	9	7	12	12	1	0	51	1,647
Russia	63	797	8	1	161	2	36	0	1	0	18	12	4	87	1	163	1	7	0	240	8	1,610
Maldives	3	215	8	0	1	10	832	0	0	0	21	1	3	1	1	0	7	0	0	0	27	1,130
Spain	587	145	2	16	146	4	22	0	1	0	2	4	85	0	3	0	1	4	0	0	5	1,027

Table 5. Top ten markets vs. main airlines to Sri Lanka, June 2022

Country	Sri Lankan Airlines	Qatar Airways	Emirates	Spice Jet	Indigo	Etihad Airways	Singapore Airlines	Fly Dubai	Turkish Airline	Gulf Air	Air India	Malaysia Airlines	Air_Arabia	Oman Air	Aeroflot	Air Asia	Other	Total
India	53.5	0.5	1.1	20.4	17.4	0.2	0.2	0.2	0.0	0.2	5.7	0.1	0.1	0.1	0.0	0.1	0.1	6810
United Kingdom	53.9	18.9	12.9	0.1	0.1	6.2	0.6	0.7	0.2	4.2	0.5	0.3	0.1	0.9	0.0	0.4	0.0	3368
Australia	66.3	1.4	1.7	0.1	0.1	0.3	24.7	0.2	0.0	0.0	0.0	4.8	0.1	0.0	0.0	0.2	0.0	2511
Germany	42.7	22.5	14.8	0.1	0.6	8.0	0.2	1.1	1.9	3.7	0.2	0.1	0.2	3.3	0.0	0.4	0.0	2466
Canada	44.4	41.3	7.1	0.0	0.3	3.2	0.6	0.4	0.4	0.0	0.7	0.8	0.0	0.3	0.0	0.3	0.0	2308
France	28.8	38.6	17.4	0.1	0.3	4.3	0.2	0.3	0.9	3.4	0.2	0.5	0.1	4.6	0.0	0.2	0.2	1717
United States	35.5	25.4	18.7	0.2	0.7	3.7	11.1	0.5	1.0	0.2	0.4	0.5	0.4	0.7	0.0	0.9	0.0	1647
Russian Federation	9.3	3.9	13.5	0.0	0.1	5.6	0.1	35.2	0.2	5.4	0.0	0.2	10.1	0.4	14.9	0.7	0.3	1610
Maldives	79.6	0.3	18.7	0.1	0.3	0.0	0.3	0.1	0.3	0.1	0.0	0.4	0.0	0.0	0.0	0.0	0.0	1130
Spain	13.2	57.0	13.5	0.0	0.1	6.8	0.2	0.4	8.3	0.0	0.0	0.0	0.0	0.4	0.0	0.1	0.0	1027



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