



MONTHLY TOURIST ARRIVALS REPORT:

A MONTHLY SNAPSHOT OF INTERNATIONAL ARRIVALS TO
SRI LANKA FROM IMMIGRATION STATISTICS

MARCH 2024

Introduction

The following document provides a synthesis of the most recent March, 2024 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st March 2024, 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 March 2024, Sri Lanka saw a significant rise in international tourist arrivals, marking a 66.6% increase compared to March of the previous year, with a total of 209,181 visitors. However, when compared to the 233,382 arrivals recorded in 2018 and the forecasted conservative estimate of 218,002, the March 2024 arrivals still fall short. The total arrivals recorded until March amounted to 635,784.

In March, Sri Lanka experienced a notable surge in tourist arrivals from vital source markets including India, Russia, the United Kingdom, Germany, and China. The substantial increase in visitors from

these countries significantly contributed to boosting Sri Lanka's tourism sector.

By 2024, it is expected that international tourist arrivals will completely rebound, surpassing 2019 levels with a projected growth of 2%. The recent UNWTO Tourism Confidence Index survey indicates positive sentiment, with 67% of industry professionals showing optimism for 2024 compared to the previous year. The anticipated full recovery by the end of 2024 is credited to the release of pent-up demand, enhancements in air connectivity, and the resurgence of Asian markets and destinations.

Table 1. Monthly tourist arrivals, March 2024

Month	2023	2024	% Change 2024/23
January	102,545	208,253	103.08
February	107,639	218,350	102.09
March	125,495	209,181	66.68
April	105,498		
May	83,309		
June	100,388		
July	143,039		
August	136,405		
September	111,938		
October	109,199		
November	151,496		
December	210,352		
TOTAL	1,487,303	635,784	



Tourist Arrivals | March 2024

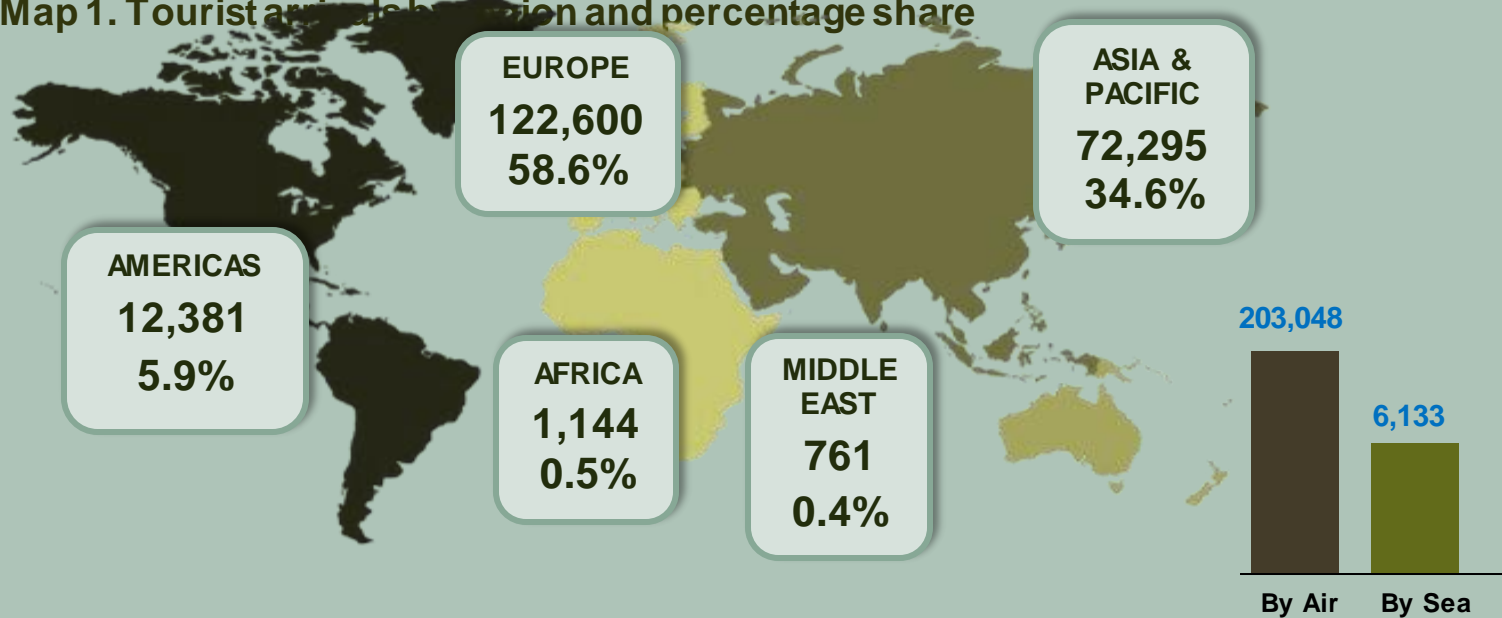
209,181



Tourist arrivals by region and percentage share

March 2024

Map 1. Tourist arrivals by region and percentage share



Europe significantly influenced Sri Lanka's tourism landscape, constituting 58.6% of total arrivals, while Asia and the Pacific emerged as primary sources, accounting for 34.6% of visitors. This transformation underscores the evolving dynamics of Sri Lanka's tourism, with Europe and Asia-Pacific playing pivotal roles.

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The uptick in tourism can be attributed to increased demand from India, Russia, Germany, the UK, and China, which has bolstered Sri Lanka's tourism sector. The Americas accounted for 5.9% of arrivals, while the Middle East and Africa contributed 0.4% and 0.5% respectively, shaping Sri Lanka's tourism profile uniquely.



Top primary markets and top potential markets

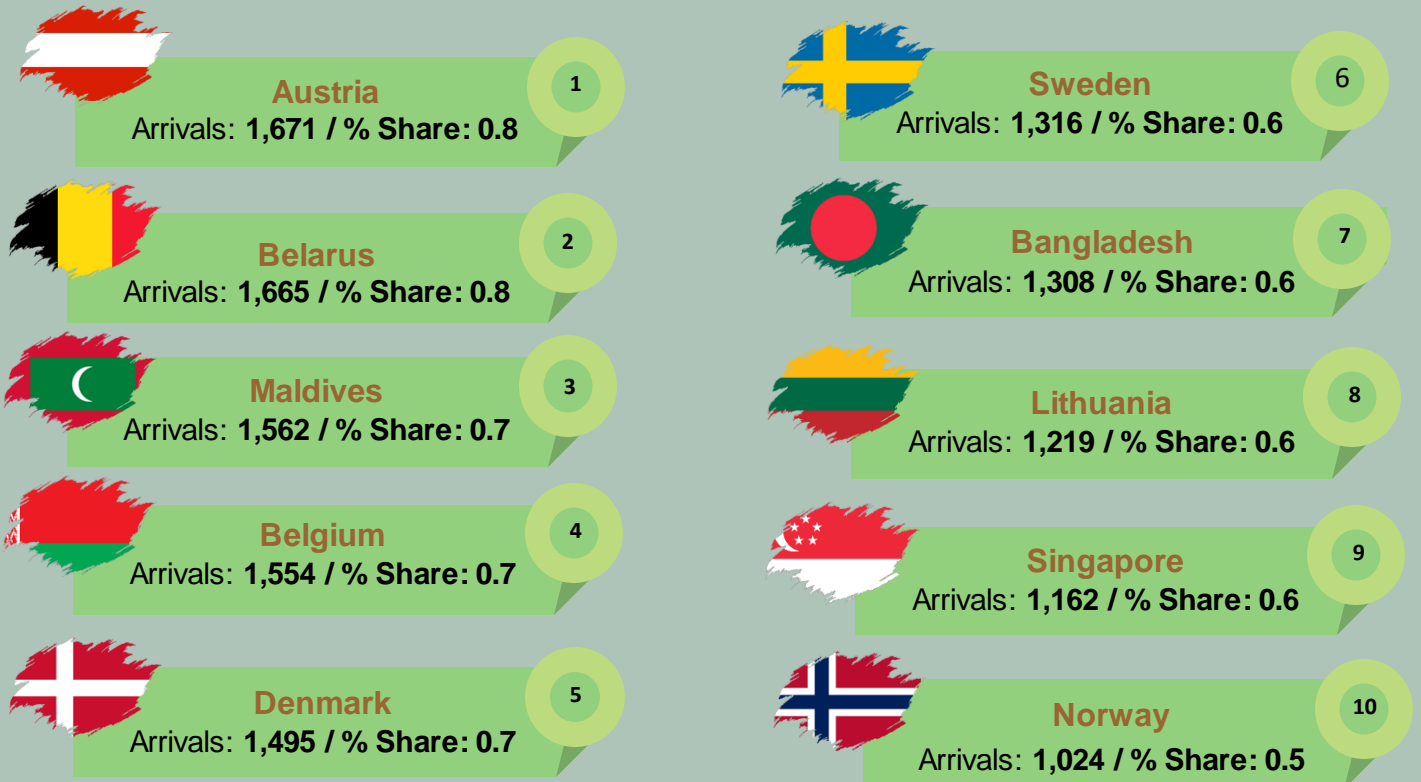
Top primary markets, March 2024



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, March 2024



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

March 2024

In January, India led tourist arrivals to Sri Lanka, representing 15% of the total, with Russia, the UK, Germany, and China closely following at 14%, 10%, 9%, and 6% respectively. These figures underscore changing travel preferences. Significantly, there was a rise in arrivals from China, Poland, and the United Kingdom compared to the previous year, indicating a shift towards emerging destinations. Poland's notable inclusion in the top ten source markets is noteworthy. However, Canada experienced a decrease in tourist arrivals compared to the previous March, despite being in the top ten list. This decline might be attributed to the absence of the diaspora visiting friends and relatives during this period.

The combined influence of factors like the current peak season, enhanced air links, favorable local settings, geographical proximity, and geopolitical conditions has significantly boosted these nations' importance as major contributors to Sri Lanka's tourism industry.

Chart 1. Top ten source markets to Sri Lanka, March 2024

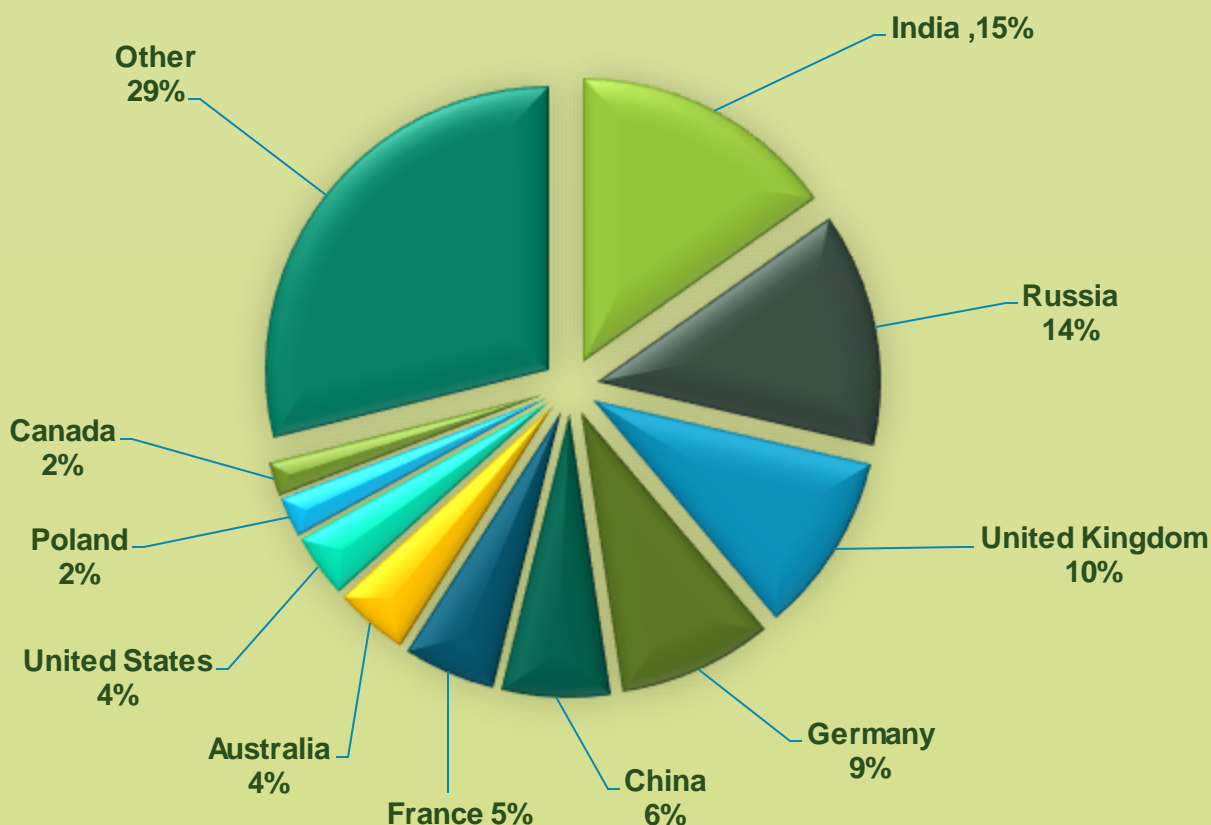
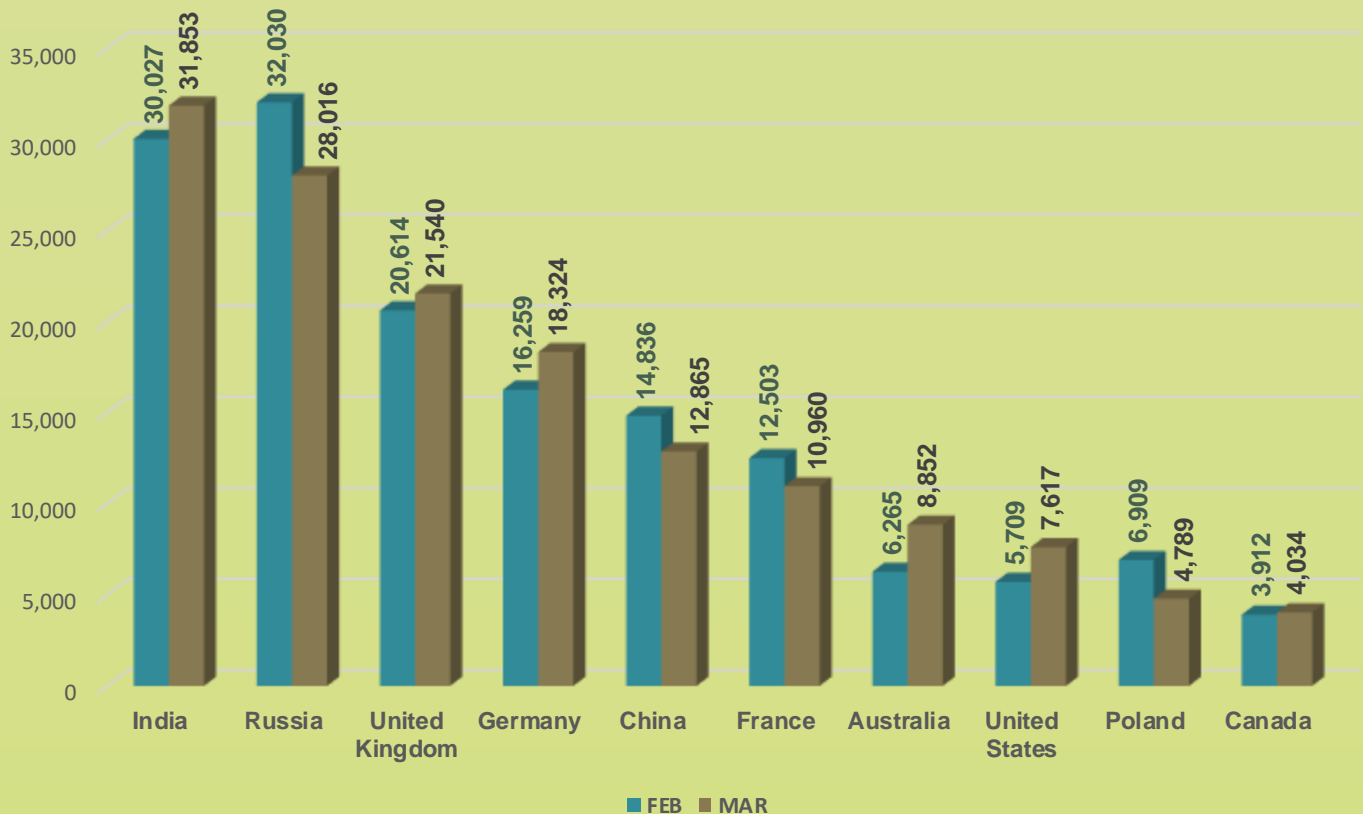




Table 2. Top ten source markets to Sri Lanka, March

Rank	Country of Residence	Tourist Arrivals (March 2024)			Tourist Arrivals (March 2023)
		By Air	By Sea	Total	
1	India	31,835	18	31,853	18,959
2	Russian Federation	28,014	2	28,016	25,553
3	United Kingdom	19,753	1,787	21,540	11,053
4	Germany	18,144	180	18,324	9,702
5	China	12,858	7	12,865	3,096
6	France	10,945	15	10,960	5,786
7	Australia	8,301	551	8,852	4,725
8	United States	4,863	2,754	7,617	5,701
9	Poland	4,781	8	4,789	1,507
10	Canada	3,760	274	4,034	4,066

Chart 2: Comparison of arrivals from top ten markets to Sri Lanka, Feb / March 2023





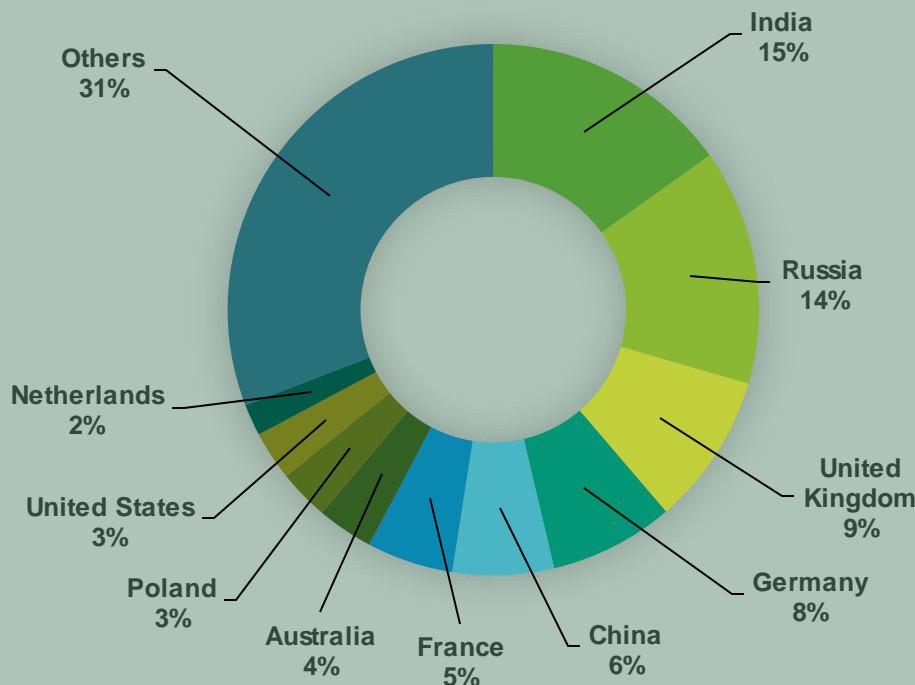
Top ten source markets January to March 2023

During the first quarter of this year, Sri Lanka saw substantial tourist arrivals from India, the Russian Federation, the United Kingdom, Germany, and China, ranking them as the top five international tourist-generating markets. Notably, there was a notable surge in arrivals from China, Poland, the Netherlands, the United Kingdom, and India during this period. It's worth mentioning that tourist arrivals from the Russian Federation experienced the least growth compared to other countries during this timeframe.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ March 2024)	Tourist Arrivals (Jan ~ March 2023)
1	India	96,279	46,432
2	Russian Federation	91,205	79,891
3	United Kingdom	58,819	28,111
4	Germany	48,176	25,849
5	China	39,212	5,466
6	France	33,382	16,744
7	Australia	21,762	11,506
8	Poland	19,498	3,894
9	United States	19,038	10,780
10	Netherlands	12,249	4,572
11	Other	196,164	102,434
Total		635,784	335,679

Chart 3. Top ten source markets to Sri Lanka, January to March 2024





Tourist arrivals by purpose of visit

March 2024

A thorough analysis of why tourists choose Sri Lanka as their destination uncovers diverse travel motivations. The predominant reason, comprising 68% of all visits, is leisure and vacation, highlighting the country's appeal as a leisure destination. Furthermore, 8% of travelers visit to reconnect with friends and family, emphasizing Sri Lanka's capacity to draw individuals seeking personal connections.

In contrast, only 2% of visits are for business purposes, reflecting a limited emphasis on professional engagements. Additionally, 7% of travelers visit for MICE (Meetings, Incentives, Conferences, and Exhibitions) purposes, indicating Sri Lanka's increasing recognition as a hub for corporate events. Niche interests are also evident, with 0.8% and 0.04% of travelers opting for health/Ayurvedic and educational experiences, respectively.

During March, recreational activities became the primary reason for travelers to choose Sri Lanka across major source markets. Notably, substantial percentages of tourists from India (60.5%), Russia (68.7%), the United Kingdom (72%), Germany (77.5%), China (89.9%), France (80.1%), Poland (73.7%), USA (72.1%), Poland (73.3%), and Canada (36.7%) opted for Sri Lanka as a destination for leisure and enjoyment, reinforcing its image as a place for relaxation and pleasant experiences.

In March, the appeal of visiting friends and relatives in Sri Lanka diminished, as indicated by the lower preferences among tourists. Specifically, 30.2% of Australian visitors, 54% of Canadian travelers, and 17.1% of British tourists opted for such connections during their trips to the country.

Furthermore, a segment of travelers from Russia (13.8%) and Poland (14.1%) chose Sri Lanka for MICE activities, with 7.5% of Indian visitors arriving for business purposes. Additionally, 4.2% of German tourists sought health-related services in Sri Lanka, demonstrating the varied reasons driving tourism to the country.

Chart 2: Purpose of visit

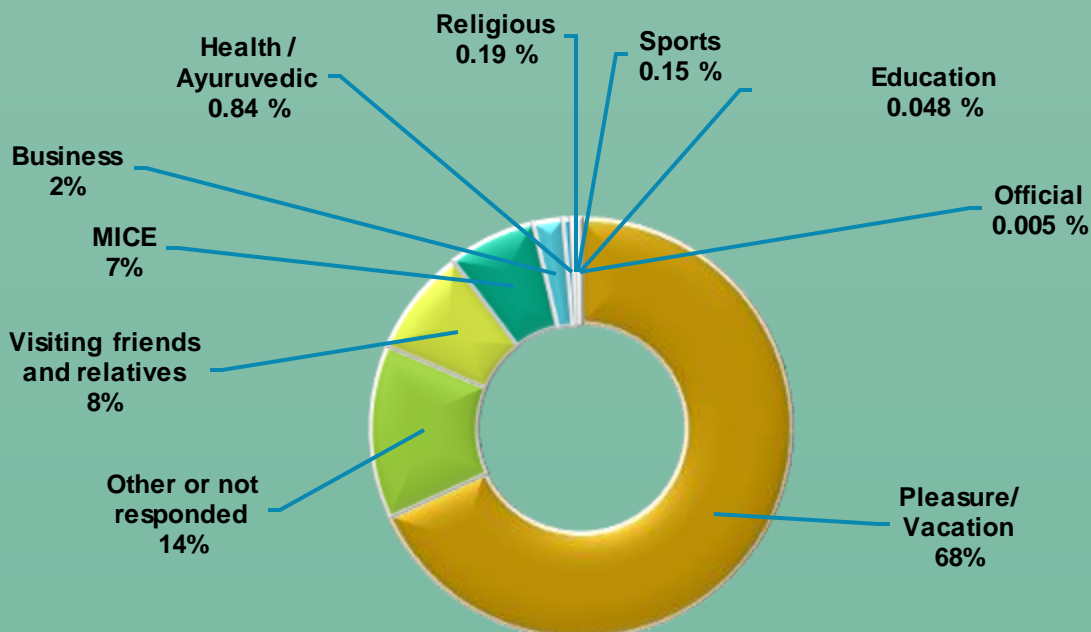
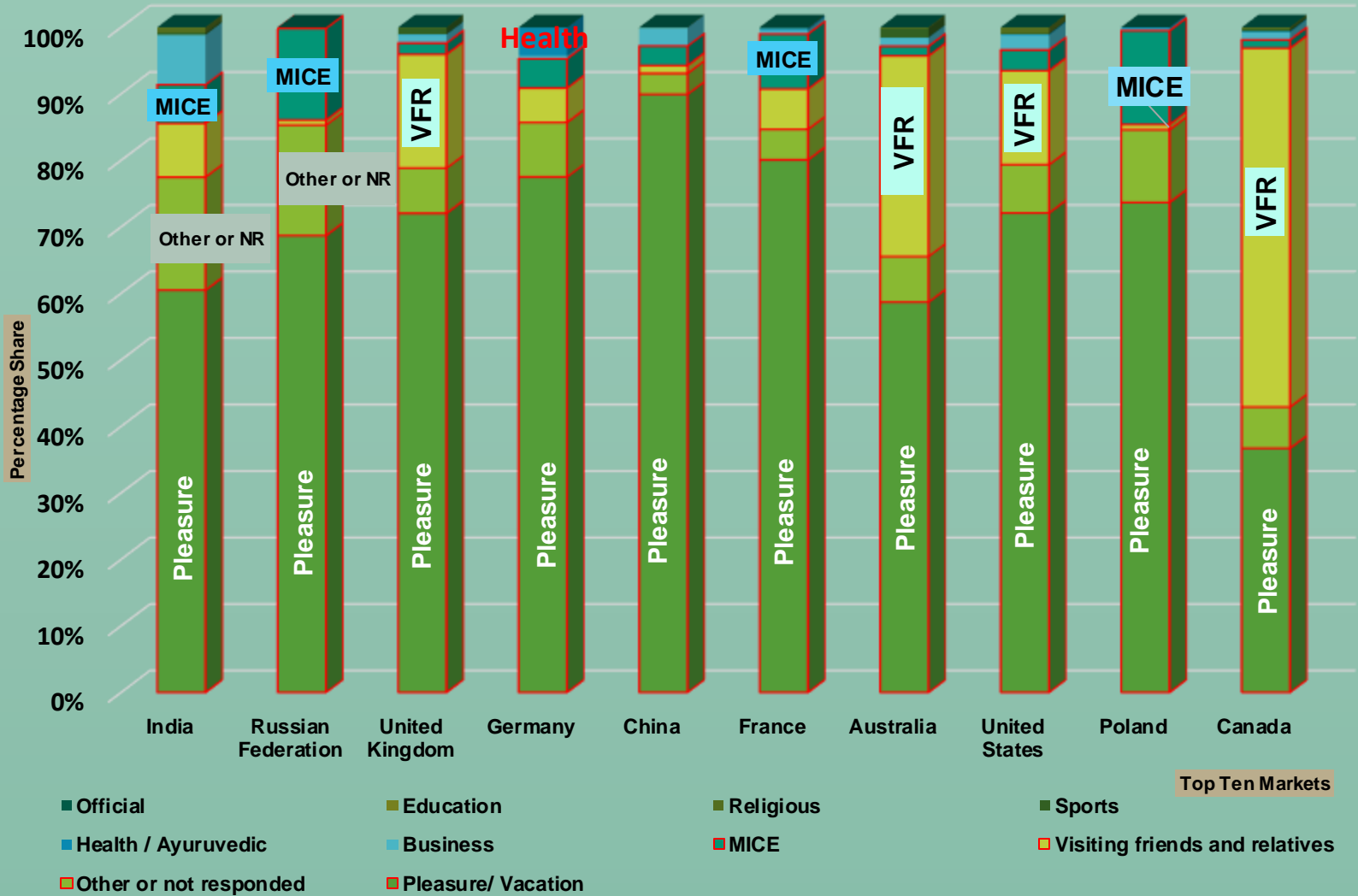




Chart 3: Purpose of visit vs main source markets





Europe's Performance as a Primary Source Market

Sri Lanka's tourism industry is experiencing robust growth, marked by significant increases in tourist arrivals and earnings. In January, February and March 2024, the sector saw impressive growth rates of 103.08%, 102.09% and 66.6% in tourist arrivals compared to the same months in previous year. Ambitious targets have been set, with expectations of welcoming over 2.3 million tourists in 2024. The industry's resilience is evident as it reached 1,025.88 USD Mn in earnings in the first quarter of 2024, showcasing a remarkable revival despite challenges. With investments in infrastructure and promotional activities, Sri Lanka aims to capitalize on its natural beauty, cultural heritage, and diverse attractions to position itself as a leading tourist destination in the region.

Europe stands as a crucial source market for Sri Lanka's tourism industry, with its contribution to tourist arrivals escalating from 48% in 2021 to 60% in 2022 before stabilizing at 50.9% in 2023. Various historical events and trends have shaped tourism flows to Sri Lanka. The Civil Conflict (1983-2009) notably deterred tourists due to safety concerns and negative media coverage, whereas the period of Post-War Recovery since 2009 witnessed a resurgence in travelers. Global events like economic recessions and geopolitical conflicts, such as the Russia-Ukraine conflict, have also influenced tourism patterns. Additionally, the Easter attack and economic crises have negatively impacted tourist influx. Effective tourism promotion strategies, including targeted marketing campaigns, have played a pivotal role in attracting especially European visitors by showcasing Sri Lanka's cultural and natural attractions. Moreover, investments in infrastructure, particularly in transportation and accommodation facilities, have bolstered Sri Lanka's appeal as a tourist destination for Europeans, contributing to increased tourism flows. Considering the blend of positive and negative elements, it's worthwhile to explore their influence on tourist arrivals originating especially from Europe.

Europe stands out as the primary hub for outbound tourism, presenting an enticing market to focus on. According to data from the UNWTO in 2019, Europe witnessed a staggering 743.9 million international tourist arrivals, constituting slightly more than half, or 51%, of the total global outbound tourism, which amounted to 1.465 billion international arrivals. As of 2022, Europe's contribution to global outbound tourism had surged to 62%, with international arrivals reaching 595 million, equivalent to 80% of the 2019 volume. While this proportion might decline as tourism normalizes, it remains a reliable gauge of Europe's market robustness. Additionally, air passenger traffic data underscores Europe's pandemic recovery progress, with figures showing an impressive rebound to 86% of the 2019 level by Q3 2022 (www.cbi.eu, n.d.).

Chart 6 : Air Passenger traffic 2019 to 2022 (q3)





Table: 4 The performance of Europe as a key source market to Sri Lanka

	Total Tourist Arrivals Up to March 2018	Total Tourist Arrivals Up to March 2023	Total Tourist Arrivals Up to March 2024	% Change – March (2018 /2024)	% Change – March (2023 /2024)
Europe	363,313	214,734	382,612	5.31	78.18
Northern Europe	112,007	37,150	78,402	-30.00	111.04
Western Europe	138,337	57,396	113,352	-18.06	97.49
Central/ Eastern Europe	80,266	103,856	161,934	101.75	55.92
Southern/ Mediterranean Europe	32,703	16,332	28,924	-11.56	77.10

An examination of European inbound tourism to Sri Lanka until March 2024, compared to the same period in 2018 and 2023, reveals intriguing insights. In March 2018, arrivals from the main European regions declined, except for Central and Eastern Europe, which saw a growth rate of 101.75%. However, comparing arrivals up to March in 2023 and 2024 shows positive growth rates across all regions, with Northern Europe experiencing the highest growth at 111.04%. The presence of the United Kingdom in this region likely contributes significantly to this growth trend. Central and Eastern Europe exhibited the lowest growth rates at 55.9%, with the Russian Federation and Poland identified as the main contributors to this region's arrivals.

In 2024, Europe's outbound tourism is forecasted to stabilize to consistent growth levels after a period of slowdown. Projections suggest that Europe will witness stable growth levels in outbound travel, indicating a normalization of the tourism sector (Skift Research, n.d.). Optimistic projections from previous years estimated outbound tourism from Europe to reach approximately 86.9 million trips by 2024. (www.cbi.eu, n.d.). Despite the challenges posed by the pandemic, Europe is expected to resume its role as a significant contributor to global outbound tourism. This stabilization reflects the gradual recovery and normalization of travel patterns in the region, with travelers increasingly returning to international destinations (www.cbi.eu, n.d.).

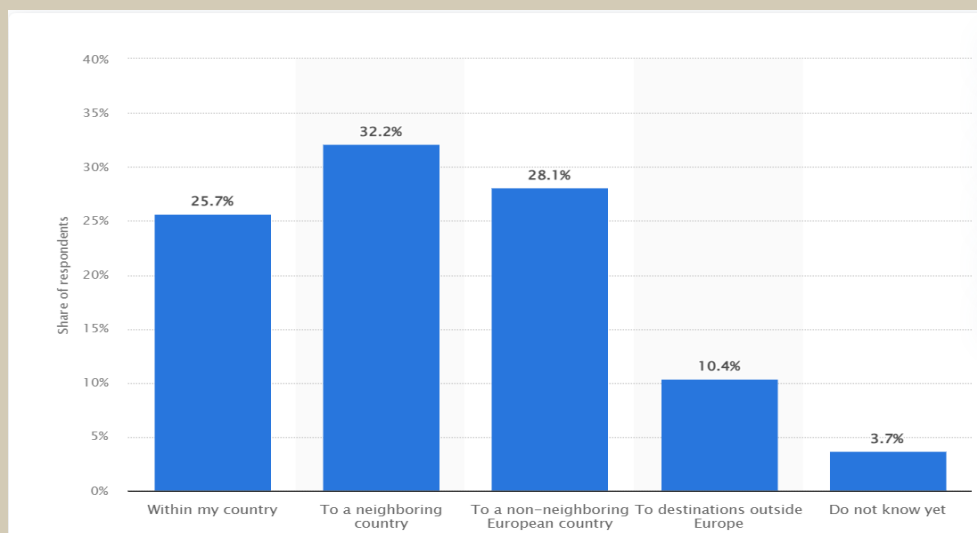
Interest in traveling to the Asia-Pacific region among European travelers is rebounding, particularly in Western European markets. Euro monitor International reports that in 2023, 9.1 million trips were made from Eastern Europe to Asia-Pacific, representing 65% of pre-pandemic levels, while Western Europe contributed 18.7 million trips, reaching 71% of pre-pandemic levels. Top destinations for Eastern Europeans in 2023 included Thailand, China, Indonesia, India, and Vietnam, while Western Europeans favored Thailand, Pakistan, India, Japan, and China. Forward Keys also notes increasing European interest in the Asia-Pacific region, primarily driven by essential segments like VFR, expatriate, and business travel. The UK emerged as the most recovered European source market to Asia-Pacific in 2023.

Looking ahead to the first half of 2024, Spain, Italy, Germany, Russia, and France are driving the recovery, albeit at varying rates. Forward Keys, highlights differences in recovery speeds across European markets, citing Spain's rapid outbound recovery due to re-established air connectivity and aggressive marketing campaigns by some Asia-Pacific destinations to attract Spanish travelers (Yue, 2024).

European travelers are influenced by various factors when choosing their travel destinations. Safety and security are paramount, with travelers prioritizing destinations that offer a sense of protection. Affordability also plays a crucial role, as travelers consider budget-friendly options essential. Additionally, the allure of diverse attractions and activities caters to the interests and preferences of European travelers. Destinations boasting rich cultural and historical significance attract those seeking immersive experiences. Moreover, accessibility, including good transportation infrastructure, is vital, making it convenient for travelers to explore and navigate their chosen destinations. Furthermore, the appeal of natural beauty, including scenic landscapes and outdoor adventures, resonates with European travelers seeking to connect with nature and enjoy picturesque views. Collectively, these factors shape the preferences of European travelers when selecting their next travel destination (Travel Weekly, n.d).



Chart :7 Share of European travelers planning a trip in the next six months as of September 2023, by destination



Source: Statista

In 2024, Europe's economic prospects will vary among its economies. Germany and Eastern European nations, closely linked to its industrial supply chain, are poised for gradual improvement. Although inflation remains above the long-term average, supply-side factors are expected to ease, bringing consumer price inflation below 3% in many significant European economies. This signals a move towards more stable economic conditions, with inflationary pressures gradually easing across the region (EIU, 2023). Consequently, an increase in travelers is anticipated for 2024, despite economic constraints experienced during last year. This scenario presents an opportunity for Sri Lanka to benefit from the uptick in travel demand.

Strategic initiatives offer promising opportunities for increased European tourism to Sri Lanka. Firstly, diversifying tourism offerings by promoting adventure, eco-tourism, cultural experiences and other niche segments can attract a wider range of European travelers seeking unique experiences. Secondly, targeted marketing strategies tailored to European preferences, including digital platforms and partnerships with travel agencies, can effectively boost visitor numbers by highlighting Sri Lanka's rich culture and authentic cuisine. Thirdly, enhancing transportation networks, accommodations, and sustainable tourism infrastructure is crucial to support the influx of European tourists and improve the overall visitor experience (BRISL, n.d.). By focusing on these areas, Sri Lanka can position itself as a top choice for European travelers beyond traditional destinations.

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International tourist arrivals by country of residence

	March 2024 Tourist Arrivals			Tourist Arrivals March 2023	Change March (24/23) 2024	Total Tourist Arrivals Up to March 2024	Total Tourist Arrivals Up to March 2023	Change Up to March (24/23) 2024
	By Air	By Sea	Total					
AMERICAS	9,308	3,073	12,381	10,256	20.72	33,251	22,781	46.0
North America	8,718	3,044	11,762	9,847	19.45	31,412	21,773	44.3
Canada	3,760	274	4,034	4,066	(0.790)	12,072	10,854	11.2
Mexico	95	16	111	80	38.75	302	139	117.3
United States	4,863	2,754	7,617	5,701	33.61	19,038	10,780	76.6
Caribbean & Central America	120	3	123	83	48.19	305	176	73.3
Costa Rica	11	0	11	8	37.50	45	18	150.0
Jamaica	18	0	18	4	350.00	33	06	450.0
Others	91	03	94	71	32.39	227	152	49.3
South America	470	26	496	326	52.15	1,534	832	84.4
Argentina	120	0	120	94	27.66	340	213	59.6
Brazil	147	12	159	112	41.96	607	296	105.1
Chile	67	10	77	27	185.19	194	98	98.0
Colombia	66	03	69	46	50.00	193	120	60.8
Others	70	01	71	47	51.06	200	105	90.5
AFRICA	1,078	66	1,144	622	83.92	3,191	1,499	112.9
North Africa	85	1	86	173	(50.29)	598	475	25.9
Morocco	34	01	35	58	(39.66)	200	143	39.9
Sudan	14	0	14	52	(73.08)	113	150	(24.7)
Others	37	0	37	63	(41.27)	285	182	56.6
Sub-Saharan Africa	993	65	1,058	449	135.63	2,593	1,024	153.2
Kenya	80	0	80	51	56.86	186	114	63.2
Mauritius	43	0	43	28	53.57	144	68	111.8
Nigeria	03	0	03	3	-	15	15	-
South Africa	484	64	548	265	106.79	1,230	531	131.6
Others	383	01	384	102	276.47	1,018	296	243.9



	March 2024			Tourist Arrivals March 2023	Change March (24/23) 2024	Total Tourist Arrivals Up to March 2024	Total Tourist Arrivals Up to March 2023	Change Up to March (24/23) 2024
	By Air	By Sea	Total					
ASIA & PACIFIC	71,544	751	72,295	38,885	85.92	211,313	91,429	131.1
North East Asia	17,256	23	17,279	4,861	255.46	53,273	10,265	419.0
China	12,858	07	12,865	3,096	315.54	39,212	5,466	617.4
Japan	2,563	12	2,575	1,042	147.12	7,234	2,760	162.1
South Korea	859	02	861	479	79.75	3,368	1,437	134.4
Taiwan	969	02	971	237	309.70	3,431	581	490.5
Others	07	0	07	7	-	28	21	33.3
South East Asia	5,421	14	5,435	2,503	117.14	13,673	6,214	120.0
Cambodia	530	01	531	47	-	614	135	354.8
Indonesia	257	0	257	133	93.23	801	446	79.6
Malaysia	1,716	05	1,721	676	154.59	5,067	1,829	177.0
Myanmar	110	0	110	73	50.68	317	144	120.1
Philippines	394	01	395	329	20.06	1,097	779	40.8
Singapore	1,162	04	1,166	636	83.33	2,832	1,536	84.4
Thailand	926	02	928	308	201.30	2,149	797	169.6
Vietnam	303	01	304	284	7.04	740	504	46.8
Others	23	0	23	17	35.29	56	44	27.3
Oceania	9,237	696	9,933	5,294	87.63	24,177	12,835	88.4
Australia	8,301	551	8,852	4,725	87.34	21,762	11,506	89.1
New Zealand	887	145	1,032	543	90.06	2,331	1,283	81.7
Others	49	0	49	26	88.46	84	46	82.6
South Asia	39,630	18	39,648	26,227	51.17	120,190	62,115	93.5
Afghanistan	18	0	18	1	-	65	12	441.7
Bangladesh	1,308	0	1,308	612	113.73	6,026	1,860	224.0
Bhutan	68	0	68	24	183.33	270	75	260.0
India	31,835	18	31,853	18,959	68.01	96,279	46,432	107.4
Iran	3,589	0	3,589	3,738	(3.99)	5,196	4,964	4.7
Maldives	1,562	0	1,562	1,774	(11.95)	7,716	5,795	33.1
Nepal	309	0	309	295	4.75	1,442	834	72.9
Pakistan	941	0	941	824	14.20	3,196	2,143	49.1
EUROPE	120,357	2,243	122,600	73,922	65.85	382,612	214,734	78.2
Northern Europe	25,041	1,858	26,899	13,879	93.81	78,402	37,150	111.0
Denmark	1,495	02	1,497	895	67.26	6,199	3,086	100.9
Finland	460	04	464	173	168.21	1,867	634	194.5
Norway	1,024	09	1,033	648	59.41	3,588	1,913	87.6
Sweden	1,316	15	1,331	631	110.94	5,155	2,338	120.5
United Kingdom	19,753	1,787	21,540	11,053	94.88	58,819	28,111	109.2
Others	993	41	1,034	479	115.87	2,774	1,068	159.7



	March 2024			Tourist Arrivals March 2023	Change March (24/23) 2024	Total Tourist Arrivals Up to March 2024	Total Tourist Arrivals Up to March 2023	Change Up to March (24/23) 2024
	By Air	By Sea	Total					
Western Europe	38,553	309	38,862	20,362	90.86	113,352	57,396	97.5
Austria	1,671	3	1,674	872	91.97	6,431	2,762	132.8
Belgium	1,554	11	1,565	722	116.76	4,455	2,093	112.9
France	10,945	15	10,960	5,786	89.42	33,382	16,744	99.4
Germany	18,144	180	18,324	9,702	88.87	48,176	25,849	86.4
Netherlands	3,629	78	3,707	1,573	135.66	12,249	4,572	167.9
Switzerland	2,502	20	2,522	1,660	51.93	8,361	5,241	59.5
Others	108	02	110	47	134.04	298	135	120.7
Central/ Eastern Europe	47,040	30	47,070	34,390	36.87	161,934	103,856	55.9
Belarus	1,665	0	1,665	1,399	19.01	5,891	3,847	53.1
Czech Republic	2,988	0	2,988	1,287	132.17	10,324	3,453	199.0
Estonia	690	0	690	197	250.25	2,498	572	336.7
Hungary	583	02	585	403	45.16	3,440	1,208	184.8
Kazakhstan	2,266	0	2,266	972	133.13	8,298	1,770	368.8
Lithuania	1,219	0	1,219	360	238.61	3,835	934	310.6
Poland	4,781	08	4,789	1,507	217.78	19,498	3,894	400.7
Romania	629	09	638	340	87.65	2,431	1,054	130.6
Russia	28,014	02	28,016	25,553	9.64	91,205	79,891	14.2
Slovakia	945	0	945	610	54.92	3,114	1,476	111.0
Ukraine	901	06	907	516	75.78	3,585	1,962	82.7
Others	2,359	03	2,362	1,246	89.57	7,815	3,795	105.9
Southern/ Mediterranean Europe	9,723	46	9,769	5,291	84.63	28,924	16,332	77.1
Greece	303	02	305	143	113.29	833	457	82.3
Italy	2,494	08	2,502	1,272	96.70	9,181	4,158	120.8
Portugal	664	06	670	299	124.08	1,811	797	127.2
Spain	2,686	20	2,706	1,125	140.53	6,746	2,752	145.1
Turkey	473	0	473	227	108.37	1,853	835	121.9
Israel	2,207	05	2,212	1,765	25.33	4,973	5,821	(14.6)
Others	896	05	901	460	95.87	3,527	1,512	133.3
MIDDLE EAST	761	0	761	1,810	(57.96)	5,417	5,236	3.5
Bahrain	29	0	29	56	(48.21)	232	225	3.1
Egypt	99	0	99	185	(46.49)	971	553	75.6
Iraq	21	0	21	64	(67.19)	149	219	(32.0)
Jordan	85	0	85	245	(65.31)	492	733	(32.9)
Kuwait	59	0	59	101	(41.58)	512	482	6.2
Lebanon	242	0	242	206	17.48	690	505	36.6
Oman	28	0	28	63	(55.56)	380	475	(20.0)
Qatar	16	0	16	67	(76.12)	102	147	(30.6)
Saudi Arabia	91	0	91	653	(86.06)	1,151	1,358	(15.2)
United Arab Emirates	72	0	72	115	(37.39)	518	354	46.3
Others	19	0	19	55	(65.45)	220	185	18.9
TOTAL	203,048	6,133	209,181	125,495	66.68	635,784	335,679	89.4



Main last departure airports and airlines to Sri Lanka, March 2024

An examination of tourists' departure airports and preferred airlines when traveling to Sri Lanka underscores the pivotal role of air travel in the nation's tourism sector. Notably, around 34% of tourists opted for departure airports in Dubai, Doha, and Chennai as their final transit hubs before reaching Sri Lanka. Moreover, the primary airlines chosen for traveling to Sri Lanka included Sri Lankan Airlines, Qatar Airways, and Emirates, accounting for a combined 44% of total tourist arrivals. The resumption of flights by Thai Airways, along with increased frequencies from Fly Dubai and Turkish Airlines, is expected to further stimulate tourist arrivals in Sri Lanka. This highlights the crucial significance of air transportation in facilitating tourism, with specific airports and airlines playing a key role in serving a significant portion of visitors.

Chart 8. Main last departure airports to Sri Lanka, March 2024

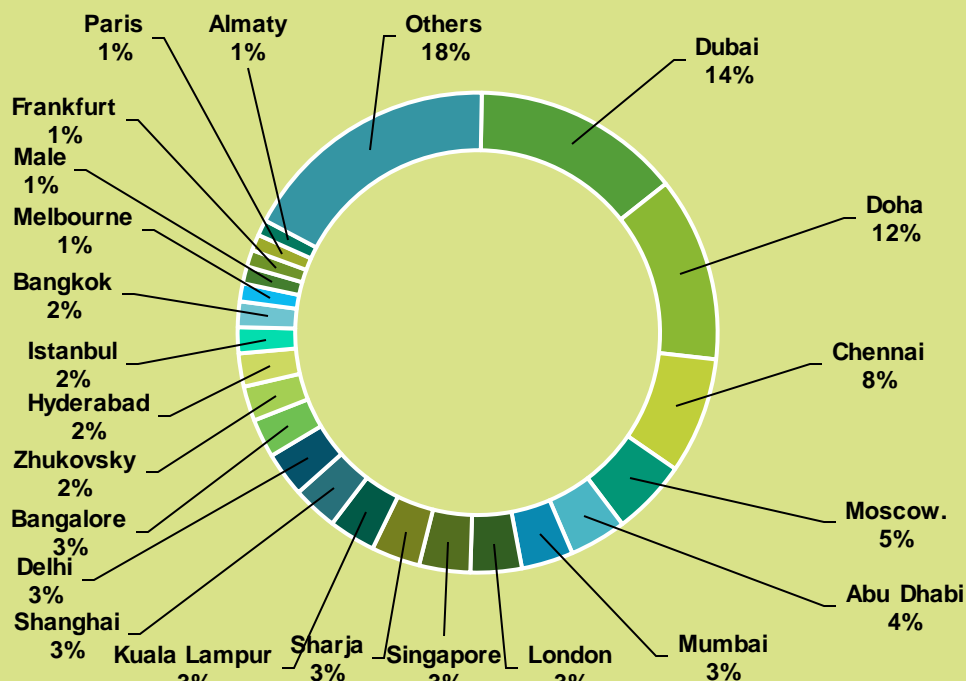
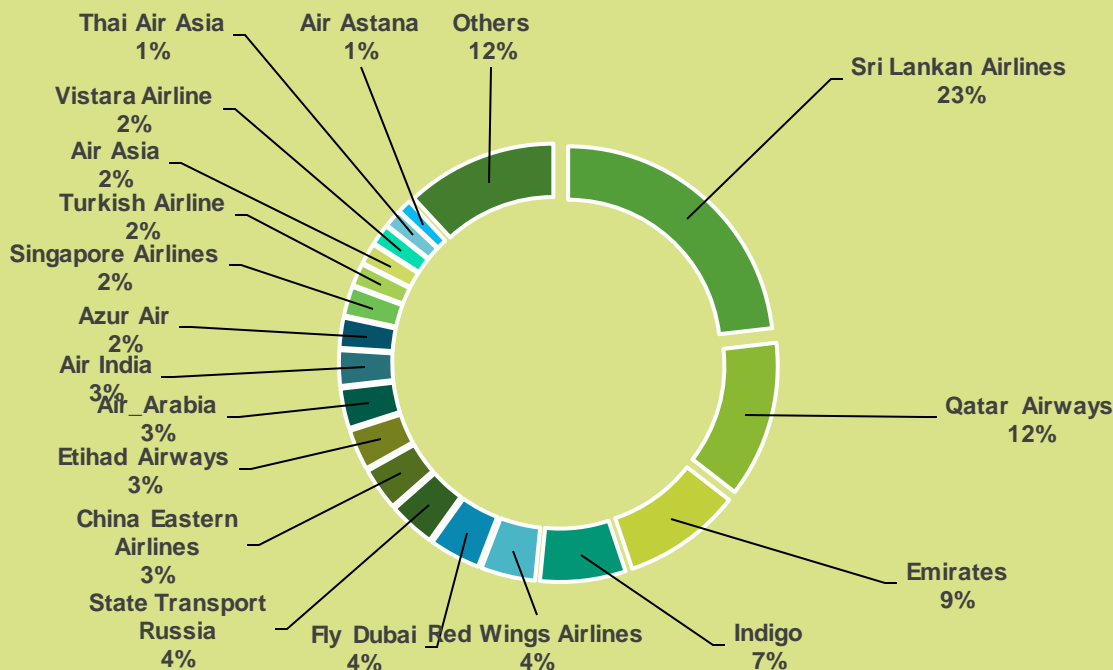


Chart 9. Main airlines to Sri Lanka, March 2024





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

March 2023

The choice of airlines significantly impacts tourists' travel experiences when heading to Sri Lanka, often mirroring their nationalities and varied airline preferences. Indian visitors commonly select Sri Lankan Airlines and IndiGo, while Red Wings is favored by Russian tourists. Conversely, Sri Lankan Airlines is preferred by travelers from the UK, Germany, Australia, and Canada. Chinese tourists typically opt for China Eastern, whereas Qatar Airways is favored by visitors from France, Poland, and the Netherlands. Regarding departure airports, Chennai is the primary choice for Indian travelers, while Doha serves as the principal gateway for tourists from France, the USA, and Poland. Australians, Russians, and Chinese travelers often use Singapore, Moscow, and Shanghai airports, respectively, as their departure points. This underscores the crucial role of accessibility in promoting Sri Lanka's tourism, demonstrating how travelers' airline and airport preferences are influenced by their home countries, emphasizing the significance of smooth travel connections in attracting visitors.

Table 5. Top ten markets vs. main airlines to Sri Lanka, March 2024

	Sri Lankan Airlines	Qatar Airways	Indi Go	Emirates	Red Wings	State Transport Russia	China Eastern Airlines	Air India	Azur Air	Etihad Airways	Air Arabia	Vistara Airline	Singapore Airline	Fly Dubai	Air China	Air Asia	Turkish Airline	Thai Air Asia	Other	
India	36.02	0.35	36.35	1.56	0.00	0.00	0.05	11.56	0.01	0.08	0.85	5.31	0.22	0.62	0.00	0.15	0.01	0.18	6.68	100.00
Russia	1.43	1.56	0.43	2.01	29.80	26.76	1.15	0.16	16.78	1.43	11.10	0.05	0.02	1.85	0.01	0.55	0.16	0.50	4.24	100.00
United Kingdom	33.92	21.12	1.44	17.87	0.00	0.00	0.19	0.90	0.00	3.75	0.85	1.70	0.72	2.11	0.05	1.39	0.54	1.12	12.32	100.00
Germany	28.63	26.29	1.00	14.35	0.00	0.01	0.17	1.34	0.02	8.39	0.64	3.99	0.35	2.48	0.06	1.36	3.70	1.35	5.86	100.00
China	24.80	0.32	0.07	0.85	0.00	0.01	45.54	0.06	0.00	0.05	0.06	0.01	0.43	0.56	14.60	2.93	0.00	2.95	6.77	100.00
France	25.45	25.80	1.05	22.74	0.00	0.00	0.17	3.36	0.00	5.71	0.35	0.65	0.48	2.78	0.05	1.08	4.75	1.19	4.39	100.00
Australia	51.39	0.82	0.97	1.98	0.00	0.00	0.07	0.51	0.00	0.35	0.16	0.38	25.68	0.53	0.01	3.03	0.02	0.64	13.45	100.00
United States	14.63	18.38	4.31	5.26	0.00	0.00	0.54	2.97	0.00	1.89	0.49	1.27	4.08	1.64	0.05	1.27	1.17	1.90	40.15	100.00
Poland	4.93	19.23	0.50	11.69	0.00	0.00	0.17	0.27	0.00	1.09	0.46	0.71	0.04	16.14	0.00	0.79	4.32	0.61	39.05	100.00
Canada	27.54	13.66	2.58	23.77	0.00	0.02	0.27	2.08	0.00	8.33	0.84	0.25	1.39	1.88	0.02	1.56	0.67	1.91	13.21	100.00

Table 6. Top ten markets vs. main last departure airports to Sri Lanka, March 2024

	Dubai	Doha	Chennai	Moscow.	Abu Dhabi	Mumbai	London	Singapore	Sharja	Kuala Lumpur	Shanghai	Delhi	Bangalore	Zhukovsky	Hyderabad	Istanbul	Bangkok	Melbourne	Male	Others	Total
India	911	131	12,431	2	99	3,655	22	220	401	173	21	3,226	4,182	0	4,071	3	281	19	55	1,950	31,853
Russian Federation	1,194	447	138	10,235	691	21	17	18	3,141	211	261	59	20	4,379	56	46	123	7	103	6,849	28,016
United Kingdom	4,448	4,625	572	0	875	570	5,408	348	191	485	37	344	204	0	76	116	232	70	168	2,771	21,540
Germany	3,149	4,823	740	3	1,701	1,864	246	107	118	320	15	487	249	0	39	678	207	16	111	3,451	18,324
China	329	44	14	1	14	4	4	269	120	556	5,459	8	1	0	3	0	371	5	431	5,232	12,865
France	2,874	2,806	264	0	696	150	79	106	41	157	12	396	84	0	26	521	92	10	63	2,583	10,960
Australia	245	78	148	0	48	54	16	2,865	16	826	7	183	41	0	23	2	86	2,214	77	1,923	8,852
United States	576	1,406	341	0	174	156	79	448	38	187	37	290	153	0	137	89	160	19	63	3,264	7,617
Poland	1,344	916	70	0	82	79	23	2	22	47	1	37	8	0	5	207	23	0	52	1,871	4,789
Canada	1,079	567	252	1	358	61	495	86	34	117	6	75	33	0	29	27	88	9	40	677	4,034



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