

MONTHLY TOURIST ARRIVALS REPORT:

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

FEBRUARY 2024

Introduction

The following document provides a synthesis of the most recent February, 2024 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 29th February 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 February 2024, Sri Lanka witnessed a substantial upsurge in international tourist arrivals, marking an impressive 102.09% increase from the previous year, totaling 218,350 visitors. This surge was attributed to sustained peak tourism season momentum and favorable local and international conditions, contributing significantly to the overall rejuvenation of the tourism sector.

Throughout February, Sri Lanka experienced a notable surge in visitors from pivotal source markets, including Russia, India, the United Kingdom, Germany, and China. These nations played a pivotal role in propelling the surge in tourist arrivals, thereby providing additional support to Sri Lanka's tourism industry.

According to the most recent projections by PATA, international visitor arrivals (IVA) are expected to

see substantial growth in 2024, surpassing the volume recorded in 2019. Furthermore, the forecasts suggest that this trend of annual increases will persist into both 2025 and 2026.

As per the UNWTO, despite the pandemic challenges, international tourism has rebounded to 88% of pre-pandemic levels, driven by strong pentup demand. Forecasts indicate a complete recovery by 2024, with a projected 2% growth surpassing 2019 levels. Industry optimism is high, with 67% of professionals expressing positivity for 2024 compared to the preceding year, according to the latest UNWTO Tourism Confidence Index survey. The anticipated recovery by the end of 2024 is credited to the release of pent-up demand, improved air connectivity, and the robust resurgence of Asian markets and destinations

Table 1. Monthly tourist arrivals, February 2024

Month	2023	2024	% Change 2024/23
January	102,545	208,253	103.08
February	107,639	218,350	102.09
March	125,495		
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	426,603	



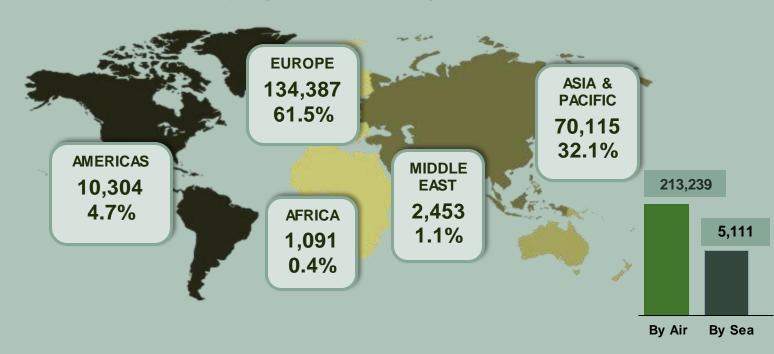
Tourist Arrivals | February 2024

218,350

Tourist arrivals by region and percentage share

February 2024

Map 1. Tourist arrivals by region and percentage share

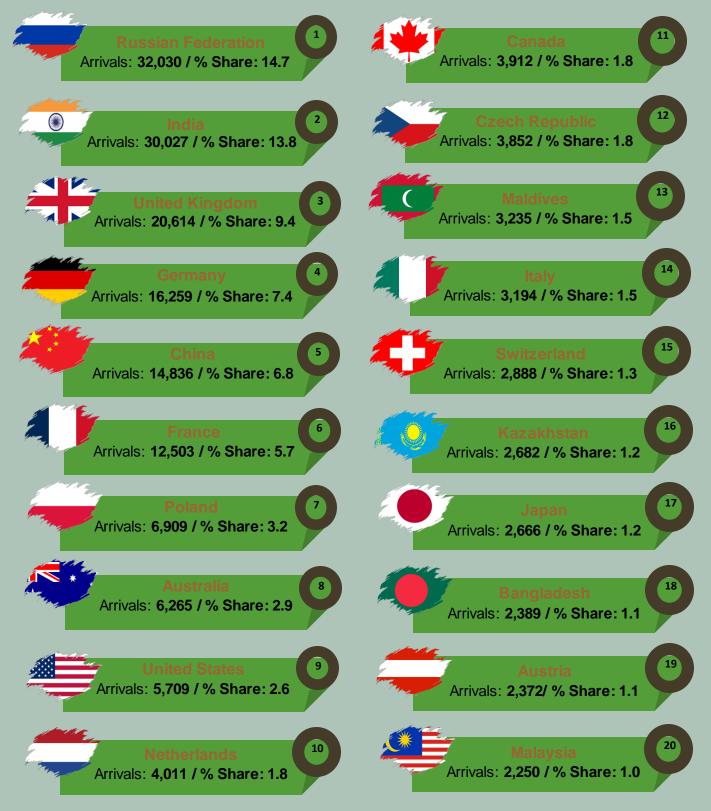


Europe played a significant role in shaping Sri Lanka's tourism landscape, accounting for 61.5% of total arrivals, while Asia and the Pacific emerged as major contributors, comprising 32.1% of visitors. This shift underscores the evolving dynamics within Sri Lanka's tourism sector, with Europe and the Asia-Pacific region being pivotal players.

The increase in tourism can be attributed to growing demand from India, Russia, Germany, the UK, and China, which have all contributed to the enhancement of Sri Lanka's tourism industry. The Americas constituted 4.7% of arrivals, while the Middle East and Africa each contributed 1.1% and 0.4% respectively, each leaving a distinct mark on Sri Lanka's tourism scene.

Top primary markets and top potential markets

Top primary markets, February 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, February 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

February 2024

In February, Russia led tourist arrivals to Sri Lanka, representing 15% of the total. Following closely were India, the United Kingdom, Germany, and China, contributing 14%, 9%, 7%, and 7% respectively, showcasing shifting travel preferences. Notably, there was an uptick in arrivals from the UK, China, Poland, Netherlands, India, USA, France, and Germany compared to the previous year, indicating a trend towards emerging destinations. Poland and the Netherlands' significant presence in the top ten source markets is noteworthy. Factors like peak season, enhanced air connectivity, local conditions, proximity, and geopolitical influences collectively boosted these countries' roles in Sri Lanka's tourism sector.

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

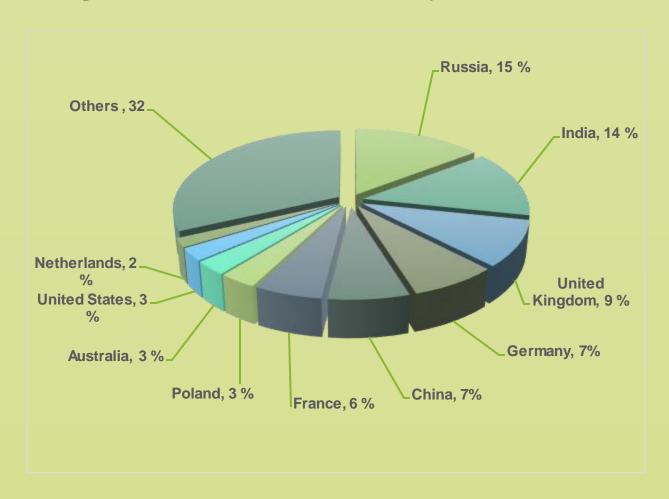


Table 2. Top ten source markets to Sri Lanka, February

	Country of	Tourist Arri	vals (Febr	uary 2024)	Tourist Arrivals
Rank	Residence	By Air	By Sea	Total	(February 2023)
1	Russian Federation	31,960	70	32,030	29,084
2	India	30,001	26	30,027	13,714
3	United Kingdom	18,070	2,544	20,614	8,575
4	Germany	15,831	428	16,259	7,930
5	China	14,834	02	14,836	1,535
6	France	12,394	109	12,503	6,118
7	Poland	6,907	02	6,909	1,118
8	Australia	5,800	465	6,265	3,113
9	United States	4,902	807	5,709	2,443
10	Netherlands	3,972	39	4,011	1,485



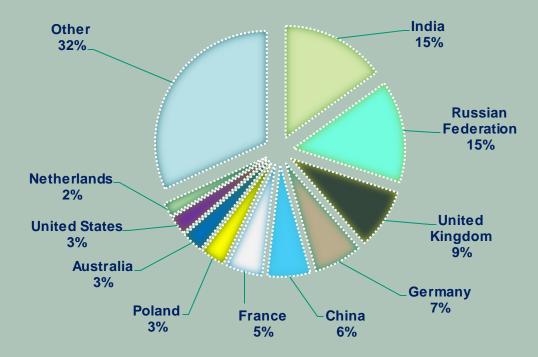
Top ten source markets January to February 2023

Sri Lanka's leading international tourist-generating markets from January to February this year were India, the Russian Federation, the United Kingdom, Germany, and China. Despite Russia's emergence as a top source market, there was only a 16.3% increase in arrivals compared to the same period in 2023. Notably, significant increases in tourist arrivals were observed from China, Poland, the USA, the Netherlands, India, and the UK during this period.

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

Rank	Country of Residence	Tourist Arrivals (January ~ February 2024)	Tourist Arrivals (January ~ February 2023)							
1	India	64,426	27,473							
2	Russian Federation	63,189	54,338							
3	United Kingdom	37,279	17,058							
4	Germany	Germany 29,852								
5	China	26,347	2,370							
6	France	22,422	10,958							
7	Poland	14,709	2,387							
8	Australia	12,910	6,781							
9	United States	11,421	5,079							
10	Netherlands	8,542	2,999							
11	Other	135,506	64,594							
	Total	426,603	210,184							

Chart 2. Top ten source markets to Sri Lanka, January to February 2024





Tourist arrivals by purpose of visit

February 2024

A detailed examination of tourist motivations for visiting Sri Lanka reveals diverse travel purposes. The majority, accounting for 69% of all visits, opt for leisure and vacation, indicating the country's popularity as a relaxation destination. Additionally, 7% visit to reconnect with friends and family, showcasing Sri Lanka's ability to attract those with personal ties.

In contrast, business-related visits constitute only 2%, indicating a smaller segment focusing on professional engagements. Moreover, 8% come for MICE purposes, reflecting Sri Lanka's emerging reputation as a venue for conferences and events. Niche interests are also evident, with 0.8% and 0.04% visiting for health/Ayurvedic and educational reasons, respectively.

In February, tourism in Sri Lanka was predominantly driven by leisure, with significant percentages of visitors from India (56%), Russia (69%), the UK (75%), Germany (76%), China (91%), France (81%), Poland (79%), USA (66%), and the Netherlands (84%) choosing the country for recreational purposes, highlighting its appeal as a destination for relaxation and enjoyable experiences.

Conversely, February saw fewer tourists visiting friends and relatives in Sri Lanka, with 32% of Australian, 15% of British, and 17% of American tourists opting for such connections.

Furthermore, a portion of Russian (14%) and Polish (11%) tourists traveled to Sri Lanka for MICE purposes, while 8% of Indian visitors arrived for business reasons. Additionally, 6% of German tourists visited Sri Lanka specifically for health-related services, showcasing the diverse motivations behind tourism to the country.

Chart 3: Purpose of visit

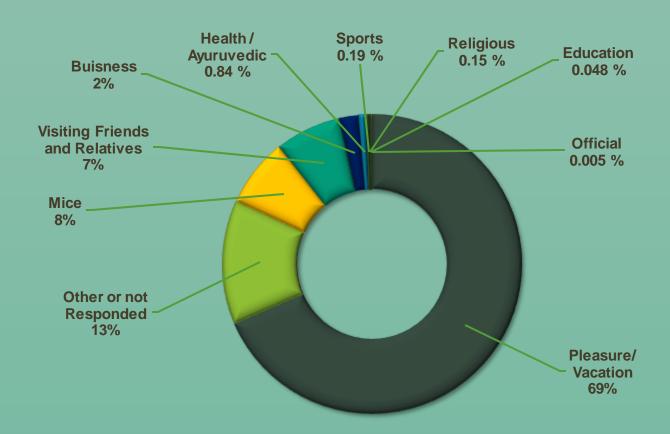
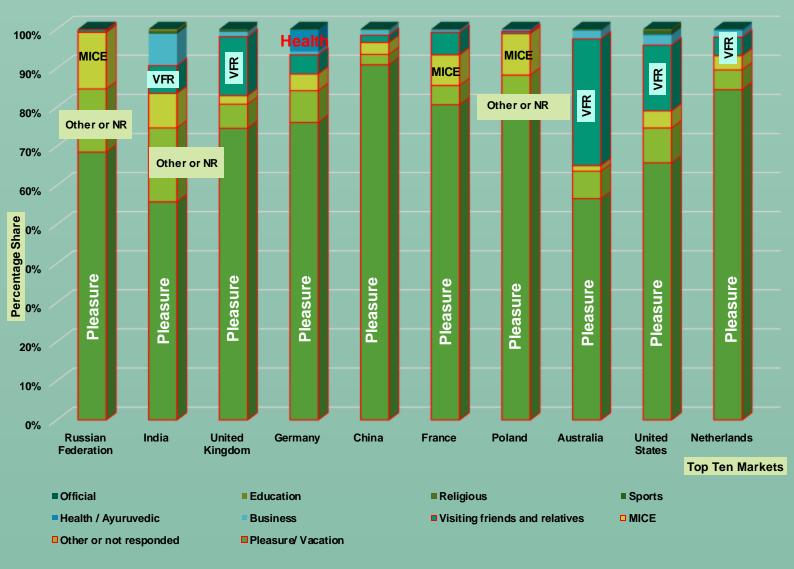




Chart 4: Purpose of visit vs main source markets







International tourist arrivals by country of residence

	Tourist Arrivals Arrivals Februar	Tourist Arrivals February	% Change February	Total Tourist Arrivals	Total Tourist Arrivals	% Change Up to February		
	By Air	By Sea	Total		(24/23)	Up to Feb 2024	Up to Feb 2023	(24/23)
AMERICAS	9,332	972	10,304	5,873	75.4	20,870	12,525	66.6
North America	8,770	946	9,716	5,590	73.8	19,650	11,926	64.8
Canada	3,791	121	3,912	3,107	25.9	8,038	6,788	18.4
Mexico	77	18	95	40	137.5	191	59	-
United States	4,902	807	5,709	2,443	133.7	11,421	5,079	-
Caribbean & Central America	95	2	97	45	115.6	182	93	95.7
Costa Rica	14	0	14	04	250.0	34	10	-
Jamaica	11	0	11	01	-	15	02	-
Others	70	02	72	40	80.0	133	81	64.2
South America	467	24	491	238	106.3	1,038	506	105.1
Argentina	79	0	79	43	83.7	220	119	84.9
Brazil	190	22	212	83	155.4	448	184	143.5
Chile	59	02	61	45	35.6	117	71	64.8
Colombia	70	0	70	38	84.2	124	74	67.6
Others	69	0	69	29	137.9	129	58	122.4
AFRICA	1,079	12	1,091	418	161.0	2,047	877	133.4
North Africa	319	0	319	130	145.4	512	302	69.5
Morocco	103	0	103	38	171.1	165	85	94.1
Sudan	42	0	42	37	13.5	99	98	1.0
Others	174	0	174	55	216.4	248	119	108.4
Sub-Saharan Africa	760	12	772	288	168.1	1,535	575	167.0
Kenya	64	0	64	40	60.0	106	63	68.3
Mauritius	53	0	53	21	152.4	101	40	152.5
Nigeria	11	0	11	02	-	12	12	0.0
South Africa	338	12	350	141	148.2	682	266	156.4
Others	294	0	294	84	250.0	634	194	-



min						Total	Total	%		
	Fe	bruary 20	24	Tourist Arrivals February	% Change February	Total Tourist Arrivals Up to Feb	Tourist Arrivals Up to Feb	Change Up to February		
	By Air	By Sea	Total	2023	(24/23)	2024	2023	(24/23)		
ASIA & PACIFIC	69,539	576	70,115	26,535	164.2	139,018	52,544	-		
North East Asia	19,748	33	19,781	3,222	-	35,994	5,404	-		
China	14,834	02	14,836	1,535	-	26,347	2,370			
Japan	2,661	05	2,666	974	173.7	4,659	1,718	171.2		
South Korea	823	07	830	508	63.4	2,507	958	161.7		
Taiwan	1,424	19	1,443	193	-	2,460	344	-		
Others	06	0	06	12	(50.0)	21	14	50.0		
South East Asia	5,011	13	5,024	1,996	151.7	8,238	3,711	122.0		
Cambodia	41	0	41	57	(28.1)	83	88	(5.7)		
Indonesia	319	01	320	175	82.9	544	313	73.8		
Malaysia	2,249	01	2,250	657	-	3,346	1,153	190.2		
Myanmar	100	01	101	36	180.6	207	71	191.5		
Philippines	438	02	440	262	67.9	702	450	56.0		
Singapore	855	07	862	486	77.4	1,666	900	85.1		
Thailand	715	01	716	210	-	1,221	489	149.7		
Vietnam	270	0	270	103	-	436	220	98.2		
Others	24	0	24	10	-	33	27	22.2		
Oceania	6,342	503	6,845	3,471	97.2	14,244	7,541	88.9		
Australia	5,800	465	6,265	3,113	101.2	12,910	6,781	90.4		
New Zealand	529	38	567	346	63.9	1,299	740	75.5		
Others	13	0	13	12	8.3	35	20	75.0		
South Asia	38,438	27	38,465	17,846	115.5	80,542	35,888	124.4		
Afghanistan	21	0	21	02	-	47	11	-		
Bangladesh	2,388	01	2,389	531	-	4,718	1,248	-		
Bhutan	67	0	67	19	-	202	51	-		
India	30,001	26	30,027	13,714	119.0	64,426	27,473	134.5		
Iran Malaliana	919	0	919	791	16.2	1,607	1,226	31.1		
Maldives	3,235	0	3,235	1,818	77.9	6,154	4,021	53.0		
Nepal	508	0	508	247	105.7	1,133	539	110.2		
Pakistan	1,299	0	1,299	724	79.4	2,255	1,319	71.0		
EUROPE Northern	130,836	3,551	134,387	72,957	84.2	260,012	140,812	84.4		
Europe	24,894	2,680	27,574	11,604	137.6	51,503	23,271	120.0		
Denmark	2,149	11	2,160	1,110	94.6	4,702	2,191	114.6		
Finland	655	11	666	204	-	1,403	461	-		
Norway	1,272	57	1,329	567	134.4	2,555	1,265	102.0		
Sweden	1,896	07	1,903	836	127.6	3,824	1,707	124.0		
United Kingdom	18,070	2,544	20,614	8,575	140.4	37,279	17,058	118.5		
Others	852	50	902	312	189.1	1,740	589	195.4		

ww.	Fe	ebruary 20	24	Tourist Arrivals	% Change February	Total Tourist Arrivals	Total Tourist Arrivals	% Change Up to
	By Air	By Sea	Total	February 2023	(24/23)	Up to Feb 2024	Up to Feb 2023	February (24/23)
Western Europe	39,042	674	39,716	19,050	108.5	74,490	37,034	101.1
Austria Belgium France Germany Netherlands Switzerland Others	2,342 1,546 12,394 15,831 3,972 2,853 104	30 31 109 428 39 35 02	2,372 1,577 12,503 16,259 4,011 2,888 106	934 725 6,118 7,930 1,485 1,812 46	154.0 117.5 104.4 105.0 170.1 59.4 130.4	4,757 2,890 22,422 29,852 8,542 5,839 188	1,890 1,371 10,958 16,147 2,999 3,581 88	151.7 110.8 104.6 84.9 184.8 63.1 113.6
Central/Eastern Europe	56,726	107	56,833	36,728	54.7	114,864	69,466	65.4
Belarus Czech Republic Estonia Hungary Kazakhstan Lithuania Poland Romania Russia Slovakia Ukraine Others Southern/ Mediterranean Europe Greece Italy Portugal Spain Turkey Israel Others	1,876 3,852 898 1,306 2,680 1,600 6,907 925 31,960 1,179 1,191 2,352 10,174 262 3,187 635 2,014 653 1,988 1,435	08 0 0 05 02 01 02 15 70 0 02 02 90 02 90 02 19 22 10 0 30	1,884 3,852 898 1,311 2,682 1,601 6,909 940 32,030 1,179 1,193 2,354 10,264 264 3,194 654 2,036 663 1,988 1,465	1,244 1,206 193 405 328 296 1,118 398 29,084 515 562 1,379 5,575 163 1,409 268 770 246 2,188 531	51.4 136.2 10.1 128.9 112.3 70.7 84.1 62.0 126.7 144.0 164.4 169.5 (9.1) 175.9	4,226 7,336 1,808 2,855 6,032 2,616 14,709 1,793 63,189 2,169 2,678 5,453 19,155 528 6,679 1,141 4,040 1,380 2,761 2,626	2,448 2,166 375 805 798 574 2,387 714 54,338 866 1,446 2,549 11,041 314 2,886 498 1,627 608 4,056 1,052	72.6 16.3 150.5 85.2 113.9 73.5 68.2 131.4 129.1 148.3 127.0 (31.9) 149.6
MIDDLE EAST	2,453	0	2,453	1,856	32.2	4,656	3,426	35.9
Bahrain Egypt Iraq Jordan Kuwait Lebanon Oman Qatar Saudi Arabia United Arab Emirates Others	81 476 74 227 222 293 116 45 549 227	0 0 0 0 0 0 0 0	81 476 74 227 222 293 116 45 549 227	35 241 92 227 219 188 229 46 365 138	131.4 97.5 (19.6) 0.0 1.4 55.9 (49.3) (2.2) 50.4 64.5 88.2	203 872 128 407 453 448 352 86 1,060 446	169 368 155 488 381 299 412 80 705 239	20.1 137.0 (17.4) (16.6) 18.9 49.8 (14.6) 7.5 50.4 86.6 54.6
TOTAL	213,239	5,111	218,350	107,639	102.9	426,603	210,184	103.0

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

The examination of departure airports and preferred airlines of tourists visiting Sri Lanka highlights the pivotal role of air travel in the nation's tourism sector. Around 34% of travelers opted for departure airports in Dubai, Doha, and Chennai before reaching Sri Lanka. Additionally, Sri Lankan Airlines, Qatar Airways, and Emirates emerged as the top airlines, collectively accounting for 47% of total tourist arrivals. This underscores the indispensable role of air transportation in supporting tourism, with specific airports and airlines playing a significant role in welcoming a large number of visitors.

Chart 5. Main last departure airports to Sri Lanka, February 2024

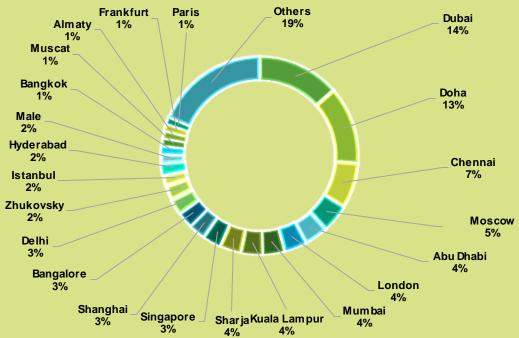
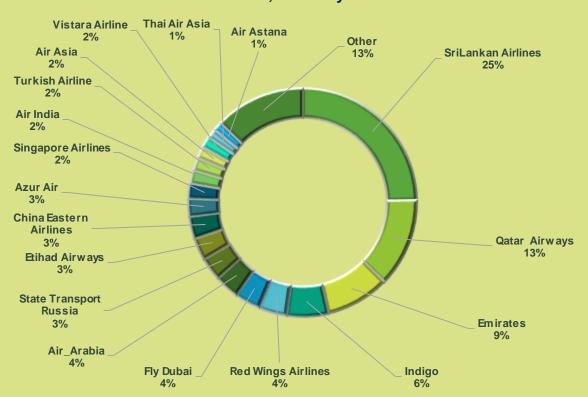


Chart 6. Main airlines to Sri Lanka, February 2024





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

February 2023

The choice of airlines significantly impacts the travel experiences of tourists heading to Sri Lanka, reflecting their nationalities and diverse airline preferences. Indian travelers commonly select Sri Lankan Airlines and IndiGo, while Red Wings is preferred by Russian tourists. Conversely, visitors from the UK, Germany, France, Australia, and the USA often favor Sri Lankan Airlines. Chinese tourists typically opt for China Eastern, while tourists from Poland and the Netherlands prefer Qatar Airways. Regarding departure airports, Chennai is the primary choice for Indian travelers, while Doha serves as the main gateway for tourists from Germany, France, the USA, and the Netherlands. Australian travelers frequently use Singapore, and Polish tourists prefer Warsaw airport at the last departure airport. This underscores the critical role of accessibility in promoting Sri Lanka's tourism, illustrating how travelers' airline and airport preferences are shaped by their home countries and emphasizing the importance of seamless travel connections in attracting visitors.

Table 4. Top ten markets vs. main airlines to Sri Lanka, February 2024

	SriLankan Airlines	Qatar Airways	Indi Go	Emirates	Red Wings Airlines	State Transport Russia	China Eastern Airlines	Air Arabia	Azur Air	Etihad Airways	Air India	Fly Dubai	Singapore Airlines	Air Asia	Turkish Airline	Air China	Thai Air Asia	Cathey Pacific	Others	
Russia	1.52	1.38	0.39	3.08	25.00	22.19	0.34	15.84	16.74	2.81	0.20	2.76	0.03	0.62	0.15	0.01	0.47	0.02	6.45	100.00
India	40.91	0.47	33.77	1.32	0.00	0.00	0.01	0.77	0.01	0.10	8.99	0.57	0.17	0.15	0.01	0.00	0.09	0.04	12.63	100.00
United Kingdom	36.47	21.01	1.84	14.69	0.00	0.00	0.13	0.40	0.00	2.87	0.60	1.34	1.09	1.34	0.16	0.00	1.24	0.40	16.40	100.00
Germany	31.12	23.06	1.24	16.64	0.01	0.02	0.15	0.60	0.07	6.76	0.47	2.30	0.62	1.29	3.43	0.07	1.33	0.07	10.74	100.00
China	21.78	0.27	0.07	2.72	0.00	0.06	41.16	0.06	0.02	0.05	0.05	0.51	1.56	4.58	0.07	12.21	4.41	8.62	1.81	100.00
France	34.44	24.55	0.97	14.36	0.00	0.00	0.14	0.62	0.01	6.27	0.73	3.37	0.52	0.99	2.89	0.01	1.14	0.14	8.87	100.00
Poland	7.08	18.22	0.69	9.31	0.01	0.01	0.01	0.28	0.00	1.19	0.48	10.93	0.06	0.59	10.04	0.00	0.81	0.04	40.24	100.00
Australia	45.09	1.28	0.83	2.30	0.00	0.00	0.29	0.18	0.00	0.45	1.66	0.49	29.34	2.73	0.02	0.00	0.94	1.07	13.34	100.00
United States	23.00	21.46	7.08	7.30	0.00	0.00	0.81	0.28	0.00	2.52	2.98	2.19	5.04	2.26	1.10	0.16	2.14	2.07	19.62	100.00
Netherlands	16.58	29.84	1.84	22.69	0.00	0.00	0.32	0.37	0.00	11.32	2.32	2.17	0.60	2.59	2.29	0.02	2.52	0.30	4.21	100.00

Table 5. Top ten markets vs. main last departure airports to Sri Lanka, February 2024

	Doha	Dubai	Chennai	Moscow.	Mumbai	London	Shanghai	Sharja	Bangalore	Abu Dhabi	Zhukovsky	Delhi	Singapore	Hyderabad	Kuala Lampur	Paris	Warsaw	Frankfurt	Istanbul	Others	Total
Russian Federation	445	2,092	169	9,552	41	11	94	5,074	27	1,348	4,739	77	25	43	305	4	1	10	49	7,924	32,030
India	160	835	11,754	3	3,431	4	4	230	4,372	59	0	3,322	143	3,370	157	1	0	0	3	2,179	30,027
United Kingdom	4,368	3,457	740	0	438	5,488	35	82	156	633	0	226	386	86	469	17	1	5	33	3,994	20,614
Germany	3,832	3,140	626	11	1,423	252	18	97	325	1,347	1	288	157	45	314	75	11	1,884	557	1,856	16,259
China	42	528	12	10	6	1	5,383	9	6	25	0	2	402	5	1,120	4	0	2	10	7,269	14,836
France	3,106	2,297	427	1	697	304	16	77	176	987	0	153	136	13	178	2,230	2	188	361	1,154	12,503
Poland	1,295	1,443	111	1	262	56	1	19	37	168	0	55	13	8	54	1	2,223	32	694	436	6,909
Australia	81	194	157	0	55	27	18	11	36	37	0	141	2,163	18	519	2	0	1	1	2,804	6,265
United States	1,241	578	446	0	194	72	51	16	171	165	0	285	358	134	240	16	2	15	63	1,662	5,709
Netherlands	1,217	1,019	73	0	134	167	10	15	49	464	0	117	42	18	162	8	0	46	92	378	4,011



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