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Monthly Tourist Arrivals Report:

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

November 2023

Sri Lanka Tourism Development Authority

Introduction

The following document provides a synthesis of the most recent November, 2023 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 30th November 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.



Table of contents

Summary.....	4
Tourist arrivals by region and percentage share, November 2023	5
Top primary markets and top potential markets, November 2023.....	6
Top ten source markets, November 2023	8
Top ten Source markets , January to November 2023.....	10
Tourist arrivals by purpose of visit, November 2023	11
First experimental TSA for Sri Lanka.....	13
International tourist arrivals by country of residence.....	15
Main last departure airports and airlines to Sri Lanka, November 2023.....	19



Summary

In November of 2023, Sri Lanka witnessed a remarkable upswing in the influx of international tourists, marking the highest number of arrivals for the entire year. The number of foreign visitors experienced a remarkable surge of 153.5%, totaling 151,496 arrivals. This surge can be attributed to the commencement of the peak tourism season and favorable conditions in Sri Lanka.

From January to November 2023, Sri Lanka accomplished a noteworthy milestone in cumulative tourist arrivals, surpassing the previous year's count of 628,017 and reaching an impressive total of 1,276,951 visitors.

During November 2023, Sri Lanka's tourism sector observed a substantial

surge in visitors, with India, Russia, Germany, the United Kingdom, and Australia emerging as the primary source markets. These nations played a pivotal role in driving the increase in tourist arrivals, making substantial contributions to the overall revitalization of Sri Lanka's tourism industry.

As per UNWTO, the rate of recovery may experience a slowdown in Q4 2023 due to prevailing economic and geopolitical challenges. Nonetheless, it is expected that the total number of international arrivals will reach 1.3 billion in 2023. Despite enduring economic challenges such as high inflation and diminished output, coupled with specific geopolitical tensions and conflicts, international tourism is on a path towards regaining pre-pandemic levels by the year 2024.

Table 1. Monthly tourist arrivals, November 2023

Month	2022	2023	% change 2023/22
January	82,327	102,545	24.5
February	96,507	107,639	11.5
March	106,500	125,495	17.8
April	62,980	105,498	67.5
May	30,207	83,309	175.8
June	32,856	100,388	205.5
July	47,293	143,039	202.4
August	37,760	136,405	261.2
September	29,802	111,938	275.6
October	42,026	109,199	159.8
November	59,759	151,496	153.51
December	91,961	-	-
TOTAL	719,978	1,276,951	-



Tourist Arrivals | November 2023

151,496



Tourist arrivals by region and percentage share November 2023

Map 1. Tourist arrivals by region and percentage share



Sri Lanka experienced a notable influence from Europe, comprising a significant share of tourists, accounting for 53% of the total arrivals. Concurrently, Asia and the Pacific assumed the lead as the primary source market for tourists visiting Sri Lanka, constituting 40.2% of the overall influx. This shift in the origin of tourists underscores the changing dynamics within Sri Lanka's tourism industry, with Europe playing a substantial role and Asia and the Pacific emerging as crucial contributors.

The upswing in tourism can be credited to the increasing demand from countries such as India, Russia, Germany, the United Kingdom, and Australia, all of which have played pivotal roles in fortifying Sri Lanka's tourism sector. To delve deeper into these contributions, the Americas constituted 5% of the total tourist arrivals, while the Middle East

and Africa contributed 1.4% and 0.5% respectively. Each of these regions has played distinct and discernible roles in shaping the characteristics of Sri Lanka's tourism landscape.

As per the latest World Economic Outlook released by the International Monetary Fund in October 2023, there is an indication of a sluggish and uneven global recovery. The forecast predicts a decline in global growth from 3.5% in 2022 to 3.0% in 2023. The escalation of geopolitical tensions in Ukraine and Palestine remains a significant factor, posing potential risks to international tourism throughout the remaining months of 2023 and extending into 2024. Consequently, the achievement of Sri Lanka's target of attracting 1.5 million tourists is anticipated with varying numbers of tourists expected from different regions of the world.



Top primary markets and top potential markets

Top primary markets, November 2023



India 1
Arrivals : **30,339** | % Share: **20.0**



Canada 11
Arrivals: **2,678** | % Share : **1.8**



Russia Federation 2
Arrivals: **24,912** | % Share: **16.4**



Bangladesh 12
Arrivals: **2,674** | % Share : **1.8**



Germany 3
Arrivals: **12,331** | % Share : **8.1**



Spain 13
Arrivals: **2,673** | % Share : **1.8**



United Kingdom 4
Arrivals : **11,526** | % Share : **7.6**



Maldives 14
Arrivals: **2,420** | % Share : **1.6**



Australia 5
Arrivals: **7,900** | % Share : **5.2**



Czech Republic 15
Arrivals: **2,373** | % Share : **1.6**



China 6
Arrivals: **6,673** | % Share : **4.4**



Netherlands 16
Arrivals: **2,370** | % Share : **1.6**



United States 7
Arrivals: **4,299** | % Share : **2.8**



Switzerland 17
Arrivals: **1,970** | % Share : **1.3**



France 8
Arrivals: **3,882** | % Share: **2.6**



Italy 18
Arrivals: **1,662** | % Share: **1.1**



Poland 9
Arrivals: **3,343** | % Share: **2.2**



Belarus 19
Arrivals: **1,508** | % Share : **1.0**



Japan 10
Arrivals: **2,875** | % Share : **1.9**



Austria 20
Arrivals: **1,212** | % Share : **0.8**

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, November 2023

 **Singapore** 1
Arrivals : **1,140** | % Share : **0.8**

 **South Korea** 6
Arrivals : **867** | % Share: **0.6**

 **Malaysia** 2
Arrivals : **1,084** | % Share : **0.7**

 **Iran** 7
Arrivals: **783** | % Share: **0.5**

 **Pakistan** 3
Arrivals : **962** | % Share: **0.6**

 **Belgium** 8
Arrivals: **769** | % Share : **0.5**

 **Sweden** 4
Arrivals : **948** | % Share : **0.6**

 **Denmark** 9
Arrivals: **764** | % Share: **0.5**

 **Saudi Arabia** 5
Arrivals: **872** | % Share: **0.6**

 **New Zealand** 10
Arrivals: **749** | % Share: **0.5**

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

November 2023

In November, India emerged as the foremost source of tourism to Sri Lanka, constituting 28% of the total arrivals. Closely trailing were Russia, Germany, the United Kingdom, and Australia, making contributions of 23%, 11%, 11%, and 7%, respectively. These figures underscore evolving preferences and travel trends. Notably, there has been a rise in arrivals from Russia and Poland compared to November of the previous year, signaling a shift towards emerging destinations. The noteworthy inclusion of Japan in the top ten source markets is also remarkable.

Several factors, including the commencement of the peak season, enhanced air connectivity, favorable local conditions, geographical proximity, and geopolitical considerations, have collectively positioned these countries as the primary contributors to Sri Lanka's tourism.

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

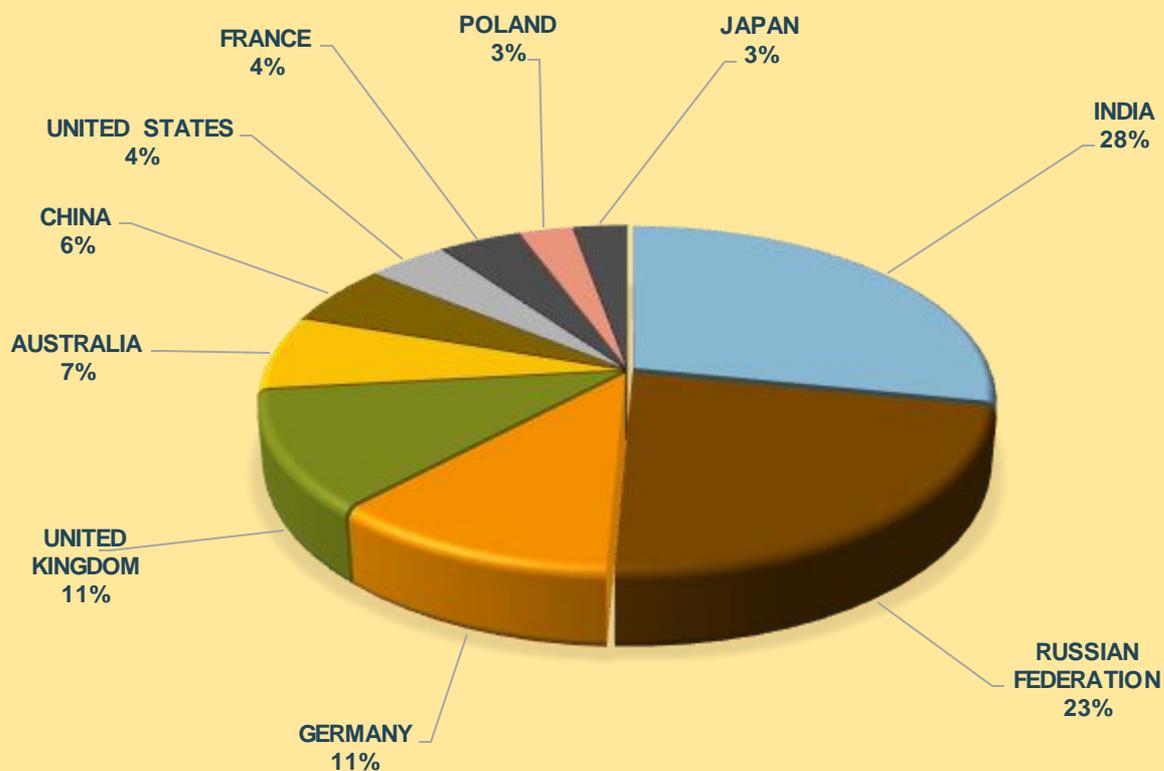
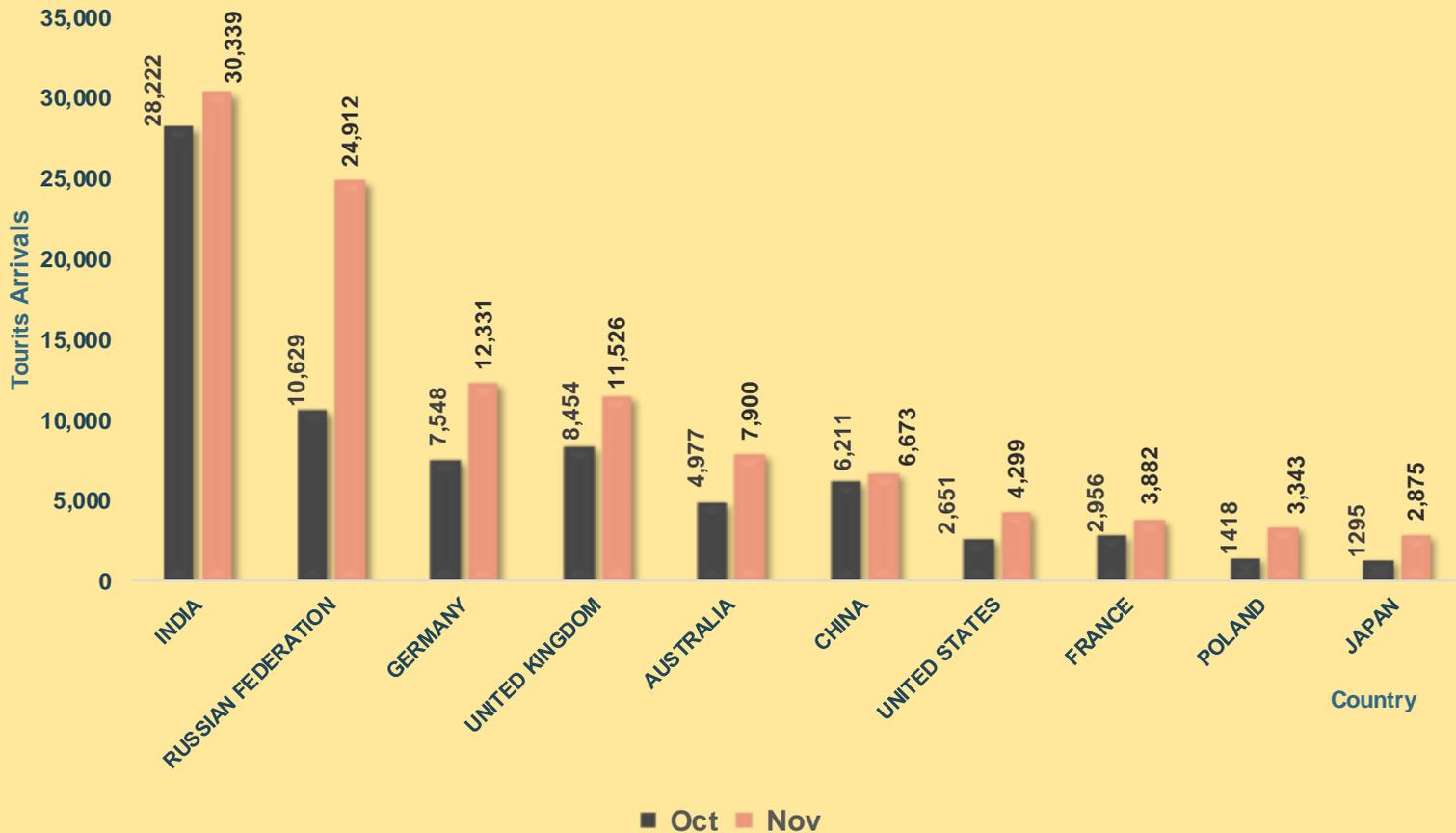




Table 2. Top ten source markets to Sri Lanka, November 2023

Rank	Country of Residence	Tourist Arrivals (November 2023)			Tourist Arrivals (November 2022)
		By Air	By Sea	Total	
1	India	30,335	4	30,339	10,167
2	Russian Federation	24,900	12	24,912	13,820
3	Germany	10,400	1,931	12,331	5,169
4	United Kingdom	9,836	1,690	11,526	4,506
5	Australia	5,862	2,038	7,900	2,939
6	China	6,620	53	6,673	591
7	United States	3,673	626	4,299	2,089
8	France	3,866	16	3,882	1,841
9	Poland	3,304	39	3,343	802
10	Japan	1,479	1,396	2,875	377

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





Top ten source markets

January to November 2023

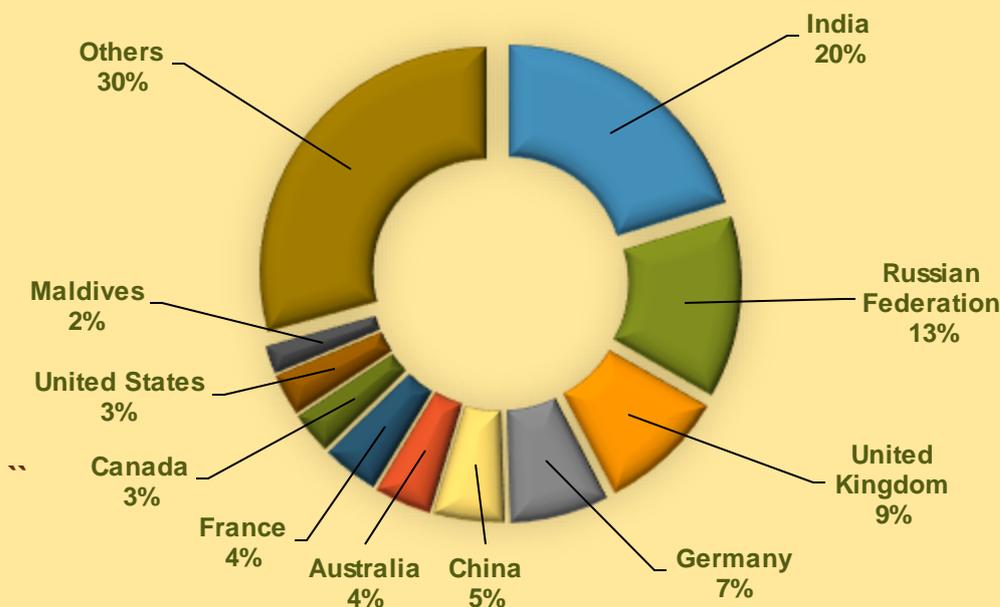
From January to November 2023, Sri Lanka witnessed a rise in international tourist numbers from its primary source markets in comparison to the corresponding period in 2022. Notably, there was a notable upswing in tourist arrivals from countries such as India, Russia, China, the Maldives, and Australia during this span, significantly contributing to the overall growth in tourist numbers in Sri Lanka for the initial eleven months of 2023.

However, it's crucial to highlight that tourist arrivals from the United Kingdom, France, Germany, and Canada displayed a decline in comparison to the same period the previous year. This implies evolving travel preferences and patterns specific to these regions.

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

Rank	Country of Residence	Tourist Arrivals (Jan. – Nov .2023)	Tourist Arrivals (Jan. – Nov.2022)
1	India	258,871	105,654
2	Russian Federation	167,841	71,309
3	United Kingdom	110,823	77,308
4	Germany	88,792	50,558
5	China	60,515	4,080
6	Australia	56,589	25,766
7	France	50,742	32,817
8	Canada	40,304	24,227
9	United States	38,300	18,592
10	Maldives	31,360	15,436
11	Others	372,814	202,270
Total		1,276,951	628,017

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





Tourist arrivals by purpose of visit

November 2023

An examination of the motivations behind tourists' visits to Sri Lanka reveals distinct trends in their reasons for traveling. A majority, accounting for 58% of all visits, selected Sri Lanka as their destination for leisure and vacation, highlighting its widespread popularity as a top choice for those seeking relaxation and enjoyable experiences. Another 8% of tourists came to reconnect with friends and relatives, emphasizing Sri Lanka's ability to attract individuals with personal connections or a desire to nurture relationships with loved ones residing there.

In contrast, business-related purposes made up only 4% 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 reputation as a venue for such events. Furthermore, niche interests were represented, with 0.6% and 0.036% visiting for health/Ayurvedic and educational purposes, respectively. These findings underscore Sri Lanka's multifaceted appeal and highlight its attractiveness as a destination that caters to a wide range of traveler preferences and goals.

In November, across all major markets, the primary reason for visiting Sri Lanka was leisure. Specifically, the data indicates that a significant proportion of tourists from key source markets, including India (56%), Russia (29%), the United Kingdom (68%), Germany (78%), China (79%), Australia (58%), France (70%), the United States (56%), Poland (81%), and Japan (83%), chose Sri Lanka as a destination for recreational purposes. This data underscores the country's strong appeal as a place for relaxation and enjoyable experiences.

As indicated by the purpose of visits statistics, November is not the favored month for visiting friends and relatives in Sri Lanka. Only 20% of British tourists, 32% of Australian tourists, 24% of American tourists, and 11% of French tourists primarily chose Sri Lanka as a destination to reconnect with friends and relatives.

In addition, 11% of Polish tourists traveled to Sri Lanka for MICE purposes, while 12% of Indian visitors traveled to Sri Lanka for business purposes. Furthermore, 5% of German tourists journeyed to Sri Lanka with the specific intention of seeking health-related services.

Chart 4: Purpose of visit

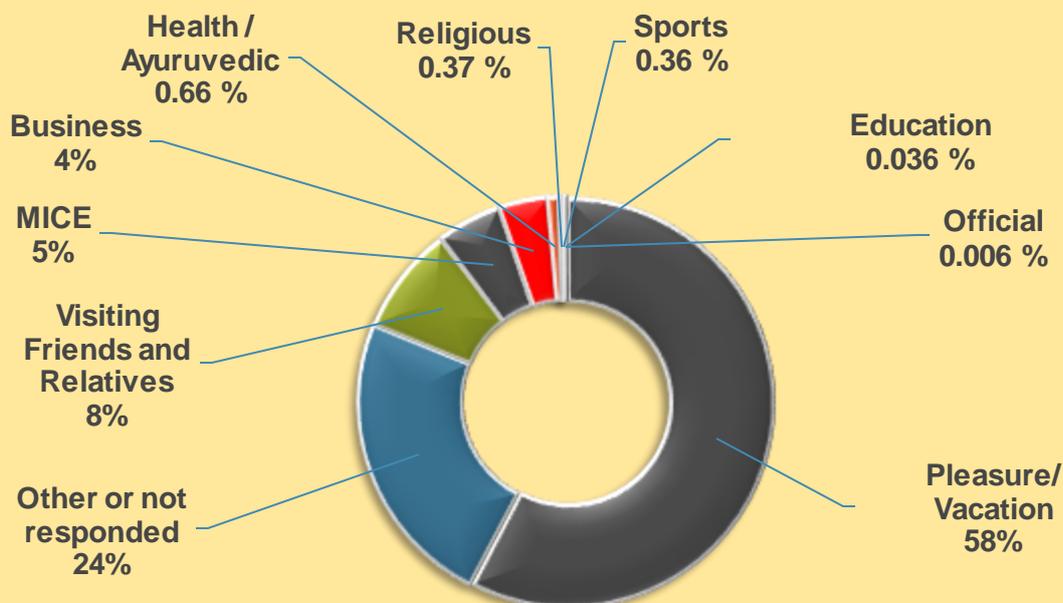
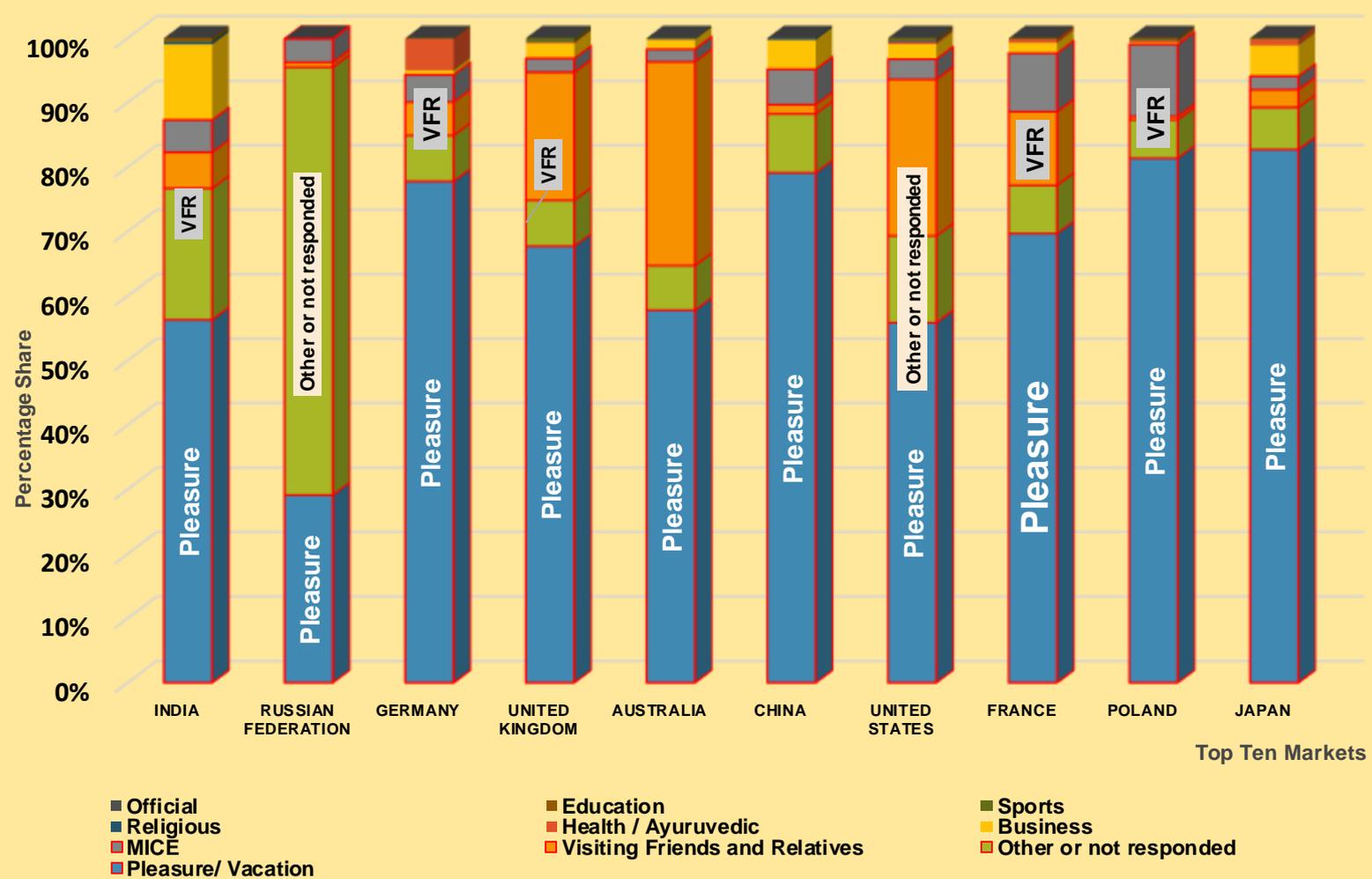




Chart 5 : Purpose of visit vs main source markets





First Experimental Tourism Satellite Account for Sri Lanka

Sri Lanka stands as a favored destination for tourists seeking an island retreat, offering captivating features such as stunning beaches, rich wildlife, cultural experiences, and traditional healthcare services. This thriving tourism sector not only generates income and livelihoods but also contributes significantly to foreign exchange earnings. Despite its evident importance, there has been a lack of information regarding its specific contribution to the national Gross Domestic Product (GDP). To address this gap, the Sri Lanka Tourism Development Authority (SLTDA) initiated a study aimed at establishing the country's first Tourism Satellite Account (TSA), aligning with international guidelines set by the World Tourism Organization.

The information below delineates the TSA for the reference year 2018, recognizing its experimental nature due to limitations in available data. Despite encountering specific challenges that impeded the creation of an all-encompassing TSA, this inaugural effort has played a crucial role in surmounting obstacles for subsequent TSAs, with the groundwork for this ongoing process already laid.

Inbound Tourism

Data utilized for the estimation of Inbound Tourism Expenditure was derived from the "Survey on Departing Foreign Tourists" (SDFT), conducted by the Sri Lanka Tourism Development Authority (SLTDA) from January to December 2018. It is important to note that the primary objective of conducting SDFT-2018 was to gather fundamental tourism statistics, assess the profile of tourists, and understand their travel patterns. The survey was not specifically designed to cater to the requirements of the Tourism Satellite Account (TSA). Consequently, detailed information on expenditure related to tourism products and services was not readily available. However, these details were approximated using the existing data on average per-tourist expenditure and the distribution of various expenditure components within the total expenditure. The key findings derived from TSA Table 1 are outlined below:

- The average non-package per-tourist and per-night expenditure was estimated to be USD 181.15.
- The broad components, namely, accommodation, transport within country, eating out activities, shopping and others contributed 32.4 percent, 17.0 percent, 25.0 percent, 12.2 percent, and 13.4 percent respectively to the total non-package tourism expenditure.
- Converting the percentage shares to absolute numbers gave the breakup of USD 181.15.
- The average duration of stay for an inbound tourist is estimated at 11.15 nights.
- The estimated number of tourists arriving in Sri Lanka in 2018, is 2.33 million.
- The multiplication of per-tourist expenditure with estimated number of tourists and average duration of stay gave the estimated values of expenditure in USD terms. This worked out to be USD 4713.77.
- On further multiplying this with the USD to LKR exchange rate gave the inbound non-package tourism expenditure as LKR 766150.
- Further, share of non-package tours in total is estimated to be 83 percent. Accordingly, total inbound expenditure (including both package and non-package components) worked out to be LKR 923,072 million.
- The broad components were mapped with the TSA products and services and using the proportions as seen in domestic tourism expenditure for these products and services, the inbound tourism expenditure was estimated for all products and services. Hence, TSA Table 1 could be prepared for Sri Lanka Experimental TSA.
- The table reveals that 27.6 percent of total inbound tourism expenditure was incurred on food and beverage. This was followed by land transport services, and Accommodation services accounting for 22.5 percent and 17.8 percent respectively.
- The inbound tourists spent about 22 percent of their total expenditure on Country-specific goods and services.
- The per-tourist inbound expenditure is estimated at LKR 395,524.



Domestic Tourism

To estimate the domestic tourism expenditure, data was obtained from Sri Lanka Tourism Expenditure Survey (SLTES), conducted by Department of Census and Statistics (DCS) for the year 2017-18 (Oct 2017 to Aug 2018). The domestic tourism expenditure was collected at fairly disaggregated level. Hence, the TSA Table 2 on Domestic Tourism Expenditure could be prepared directly from the survey findings.

The key findings are as follows:

- Total domestic tourism expenditure is estimated at LKR 38,255 million.
- Of the total domestic tourism expenditure, the highest, at 37.2 percent, is spent on country-specific goods.
- Land passenger transport is the popular mode of transport among both inbound and domestic tourists. Food and beverage account for 17.9 percent and all other products and services account for only 13.7 percent of total domestic expenditure.
- The average per-tourist expenditure is estimated at LKR 5475. Among the different purposes for travel, the highest per-tourist expenditure is recorded for a holiday/leisure trip, at LKR 8837. On the other hand, a health trip turns out to be the least expensive, at LKR 4242.

Outbound Tourism

In the case of Sri Lanka, there is no data on outbound tourism expenditure. Hence this part of the tourism expenditure cannot be presented in the experimental TSA.

Total Internal Tourism Expenditure

The summation of Inbound and Domestic Tourism Expenditure is the Total Internal Tourism Expenditure for Sri Lanka. This table shows that:

- The Sri Lankan tourism economy is driven by inbound tourism, which contributes as much as 96 percent to total tourism expenditure.
- Inbound tourism accounts for more than 90 percent of expenditure on almost all the tourism related products and services, except water transport services, country-specific goods, and other consumer goods and services, for which domestic tourism makes up for 21 percent, and 11.6 percent each respectively.
- The per-tourist expenditure incurred in the case of inbound trip in Sri Lanka is over 72 times more than that of a domestic trip.

Supply Side data

The supply side data for tourism specific industries was obtained from Sri Lanka's Supply and Use Table (SUT) for 2018 prepared by Department of Census and Statistics (DCS) Sri Lanka. These data are presented in TSA Table 5. In the core TSA Table, that is, Table 6, the demand side data and supply side were brought together, as per the recommended guideline.

Tourism Satellite Account

- Tourism Direct Gross Value Added (TDGVA) is estimated to be LKR 467,975 million for 2018, or 3.34 percent of national GVA (LKR 14,014,197 million).
- In terms of GDP, Tourism Direct GDP (TDGDP) is estimated at LKR 512,645 million. The total Gross Domestic Product for 2018 was LKR 15,351,933 million. Hence, the contribution of TDGDP to national GDP is also estimated at 3.34 percent.
- This refers to the direct share of tourism to Sri Lanka economy, as per the country's first experimental TSA.



International tourist arrivals by country of residence

	November 2023			Tourist Arrivals Nov 2022	% Change Nov (23/22) 2023	Total Tourist Arrivals up to November 2023	Total Tourist Arrivals up to Nov 2022	% Change up to Nov (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
AMERICAS	6,698	750	7,448	4,291	73.57	82,858	44,819	84.87
North America	6,320	739	7,059	4,116	71.50	79,249	43,089	83.92
Canada	2,578	100	2,678	1,994	34.30	40,304	24,227	66.36
Mexico	69	13	82	33	148.48	645	270	138.89
United States	3,673	626	4,299	2,089	105.79	38,300	18,592	106.00
Carribean & Central America	70	3	73	26	180.77	605	261	131.80
Costa Rica	06	0	06	3	100.00	52	34	52.94
Jamaica	05	0	05	0	-	47	11	327.27
Others	59	3	62	23	169.57	506	216	134.26
South America	308	8	316	149	112.08	3,004	1,469	-
Argentina	53	3	56	40	40.00	620	213	191.08
Brazil	117	0	117	51	129.41	1,101	572	92.48
Chile	31	0	31	23	34.78	353	159	122.01
Colombia	53	3	56	17	229.41	460	277	66.06
Others	54	2	56	18	211.11	470	248	89.52
AFRICA	834	26	860	376	128.72	7,919	3,962	99.87
North Africa	283	0	283	108	162.04	2,286	1,631	40.16
Morocco	64	0	64	42	52.38	655	390	67.95
Sudan	147	0	147	32	359.38	769	773	(0.52)
Others	72	0	72	34	111.76	862	468	84.19
Sub-Saharan Africa	551	26	577	268	115.30	5,633	2,331	141.66
Kenya	30	0	30	29	3.45	487	188	159.04
Mauritius	40	0	40	17	135.29	277	89	211.24
Nigeria	13	0	13	1	-	87	21	314.29
South Africa	248	26	274	125	119.20	2,543	1,244	104.42
Others	220	0	220	96	129.17	2,239	789	183.78



	November 2023			Tourist Arrivals Nov 2022	% Change Nov (23/22)	Total Tourist Arrivals up to Nov 2023	Total Tourist Arrivals up to Nov 2022	% Change up to Nov (23/22)
	Tourist Arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	57,081	3,873	60,954	19,388	214.39	511,676	181,092	182.55
North East Asia	9,424	1,558	10,982	1,265	768.14	88,626	8,318	-
China	6,620	53	6,673	591	-	60,515	4,080	-
Japan	1,479	1,396	2,875	377	-	17,029	2,379	-
South Korea	829	38	867	237	265.82	6,341	1,521	316.90
Taiwan	482	71	553	59	-	4,625	286	-
Others	14	0	14	1	-	116	52	123.08
South East Asia	3,498	154	3,652	1,414	156.36	30,967	10,064	207.70
Cambodia	42	0	42	43	(2.33)	491	137	258.39
Indonesia	215	2	217	103	110.68	2,075	751	176.30
Malaysia	1,031	53	1,084	350	209.71	9,156	2,260	305.13
Myanmar	138	0	138	14	-	1,027	225	356.44
Philippines	292	4	296	149	98.66	3,716	1,725	115.42
Singapore	1,055	85	1,140	432	163.89	7,950	3,050	160.66
Thailand	370	10	380	282	34.75	4,285	1,414	203.04
Vietnam	335	0	335	37	-	2,105	461	356.62
Others	20	0	20	4	-	162	41	295.12
Oceania	6,516	2,157	8,673	3,252	166.70	63,381	28,122	125.38
Australia	5,862	2038	7,900	2,939	168.80	56,589	25,766	119.63
New Zealand	630	119	749	307	143.97	6,570	2,294	186.40
Others	24	0	24	6	300.00	222	62	258.06
South Asia	37,643	4	37,647	13,457	179.96	328,702	134,588	144.23
Afghanistan	25	0	25	7	257.14	165	28	489.29
Bangladesh	2,674	0	2,674	511	-	14,661	3,155	364.69
Bhutan	33	0	33	31	6.45	365	130	180.77
India	30,335	4	30,339	10,167	198.41	258,871	105,654	145.02
Iran	783	0	783	206	280.10	9,422	3,939	139.20
Maldives	2,420	0	2,420	1,626	48.83	31,360	15,436	103.16
Nepal	411	0	411	126	226.19	4,282	884	384.39
Pakistan	962	0	962	783	22.86	9,576	5,362	78.59
EUROPE	76,197	3,949	80,146	34,427	132.80	649,143	382,039	69.92
Northern Europe	12,966	1,754	14,720	5,781	154.63	140,263	98,103	42.98
Denmark	754	10	764	312	144.87	8,906	6,727	32.39
Finland	352	0	352	77	357.14	1,814	1,341	35.27
Norway	616	6	622	332	87.35	7,712	5,575	38.33
Sweden	943	5	948	409	131.78	6,525	4,205	55.17
United Kingdom	9,836	1,690	11,526	4,506	155.79	110,823	77,308	43.35
Others	465	43	508	145	250.34	4,483	2,947	52.12



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	Tourist Arrivals							
	By Air	By Sea	Total					
Western Europe	20,505	2,066	22,571	9,208	145.12	205,763	117,229	75.52
Austria	1,169	43	1,212	424	185.85	8,711	4,922	76.98
Belgium	767	2	769	279	175.63	9,672	5,652	71.13
France	3,866	16	3,882	1,841	110.86	50,742	32,817	54.62
Germany	10,400	1,931	12,331	5,169	138.56	88,792	50,558	75.62
Netherlands	2,339	31	2,370	649	265.18	26,384	11,031	139.18
Switzerland	1,929	41	1,970	832	136.78	20,902	12,012	74.01
Others	35	2	37	14	164.29	560	237	136.29
Central/ Eastern Europe	36,313	82	36,395	17,062	113.31	230,341	134,640	71.08
Belarus	1,508	0	1,508	456	230.70	9,403	3,039	209.41
Czech Republic	2,371	2	2,373	355	-	9,590	6,821	40.60
Estonia	228	1	229	28	-	1,102	867	27.10
Hungary	500	5	505	136	271.32	2,746	2,024	35.67
Kazakhstan	193	0	193	95	103.16	2,731	7,806	(65.01)
Lithuania	389	7	396	195	316.83	2,232	1,957	14.05
Poland	3,304	39	3,343	802	253.42	14,729	14,671	0.40
Romania	513	3	516	146	80.26	3,137	2,906	7.95
Russia	24,900	12	24,912	13,820	210.05	167,841	71,309	135.37
Slovakia	617	0	617	199	84.23	4,002	2,226	79.78
Ukraine	472	7	479	260	132.28	4,040	14,373	(71.89)
Others	1,318	6	1,324	570	171.89	8,788	6,641	32.33
Southern/ Mediterranean Europe	6,413	47	6,460	2,376	171.89	72,776	32,067	126.95
Greece	187	0	187	41	356.10	1,472	725	103.03
Italy	1,649	13	1,662	619	168.50	18,853	6,243	201.99
Portugal	554	3	557	145	284.14	3,416	1,750	95.20
Spain	2,650	23	2,673	748	257.35	21,238	11,904	78.41
Turkey	564	2	566	154	267.53	3,224	1,290	149.92
Israel	186	1	187	548	(65.88)	19,096	7,869	142.67
Others	623	5	628	121	419.01	5,477	2,286	139.59
MIDDLE EAST	2,085	3	2,088	1,277	63.51	25,355	16,105	57.44
Bahrain	82	0	82	19	331.58	1,128	422	167.30
Egypt	344	0	344	137	151.09	2,619	2,120	23.54
Iraq	37	0	37	39	(5.13)	808	968	(16.53)
Jordan	152	0	152	177	(14.12)	3,300	2,137	54.42
Kuwait	66	0	66	41	60.98	1,805	856	110.86
Lebanon	171	0	171	88	94.32	2,863	1,339	113.82
Oman	122	0	122	84	45.24	1,930	719	168.43
Qatar	27	0	27	18	50.00	789	244	223.36
Saudi Arabia	870	2	872	471	85.14	6,504	5,628	15.57
United Arab Emirates	147	1	148	123	20.33	2,603	1,140	128.33
Others	67	0	67	80	(16.25)	1,006	532	89.10
TOTAL	142,895	8,601	151,496	59,759	153.51	1,276,951	628,017	103.33

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

Examining the departure airports and preferred airlines of tourists heading to Sri Lanka highlights the pivotal role of air travel in the country's tourism sector. As indicated by data in Chart 6, around 32% of tourists selected departure airports in Dubai, Doha, and Chennai as their final transit points before arriving in Sri Lanka. Additionally, the primary airlines favored by tourists in reaching Sri Lanka were Sri Lankan Airlines, Qatar Airways, and Emirates, collectively constituting 45% of the total tourist arrivals. This emphasizes the crucial significance of air transportation in facilitating tourism in Sri Lanka, with specific airports and airlines playing a significant role in catering to a substantial portion of visitors.

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

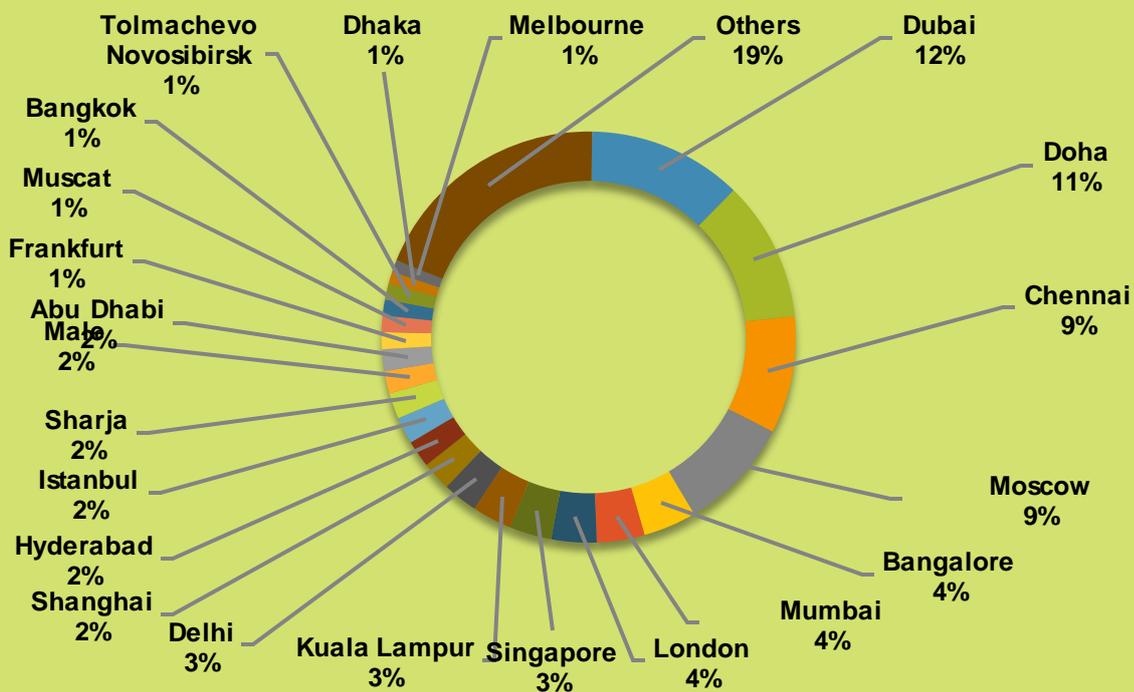
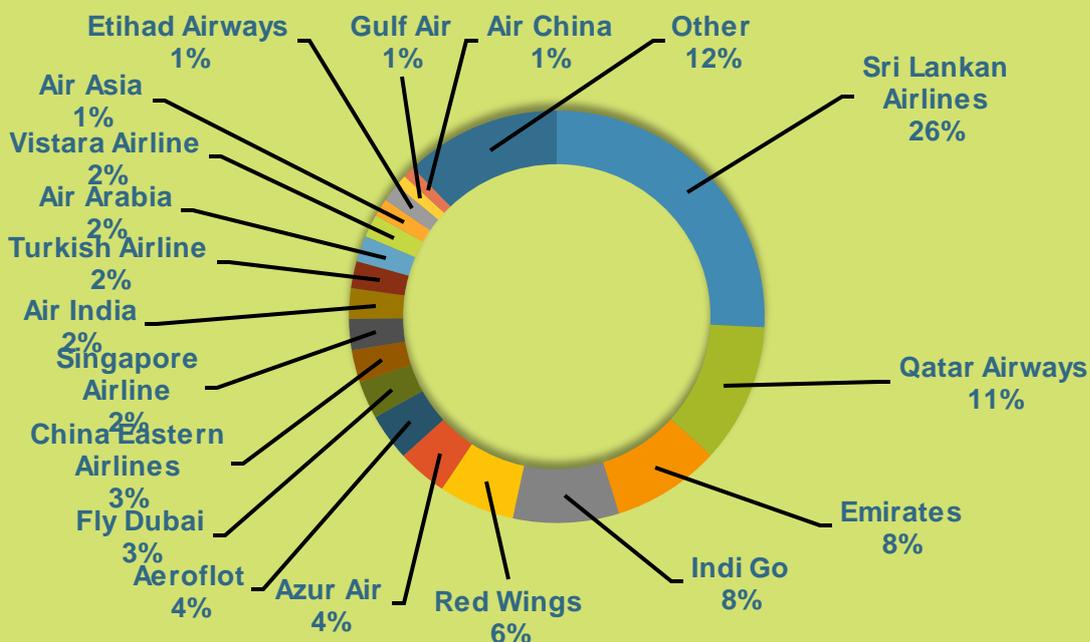


Chart 7. Main airlines to Sri Lanka, November 2023



Top ten markets versus main last departure airports and main airlines to Sri Lanka November 2023

The airline and departure airport preferences of tourists are strongly influenced by their respective home countries. For example, Indian travelers frequently opt for Sri Lankan Airlines and IndiGo, while Russian tourists lean towards Red Wings and Azur Air. On the other hand, Sri Lankan Airlines is a popular choice among tourists from the United Kingdom, Australia, the United States, and Japan. Notably, German and French visitors often choose Qatar Airways and utilize Doha as their primary departure hub. Chinese tourists show a preference for China Eastern, while Fly Dubai is the top choice for tourists from Poland.

This underscores the critical role of accessibility in promoting tourism in Sri Lanka. It highlights that tourists' decisions regarding airlines and departure airports are significantly molded by their home countries, underscoring the importance of seamless connections in attracting visitors to Sri Lanka. The initiation of services by airlines such as Air Astana and Air Arabia, coupled with heightened Sri Lankan Airlines frequencies to key destinations like Mumbai, has marked a notable development in air travel connectivity.

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

	Sri Lankan Airlines	Qatar Airways	Emirates	Indi Go	Red Wings	Azur Air	Aeroflot	Fly Dubai	China Eastern Airlines	Singapore Airline	Air India	Turkish Airline	Air Arabia	Vistara Airline	Air Asia	Etiad Airways	Gulf Air	Air China	Others	Total
India	40.91	0.34	0.97	35.18	0.00	0.00	0.00	0.81	0.02	0.19	9.72	0.01	0.47	7.73	0.16	0.07	0.05	0.00	3.36	100.00
Russian Federation	1.30	1.46	1.58	0.34	32.95	22.67	21.68	1.48	0.30	0.03	0.09	0.68	6.11	0.05	0.45	1.34	2.28	0.01	5.21	100.00
Germany	21.47	26.67	17.71	0.80	0.02	0.14	0.03	2.97	0.14	0.37	0.31	3.54	0.21	0.22	1.09	2.60	0.98	0.02	20.71	100.00
United Kingdom	39.65	17.78	14.91	2.15	0.00	0.00	0.00	1.22	0.12	0.67	0.59	0.33	0.53	0.57	1.20	0.99	1.22	0.01	18.06	100.00
Australia	37.04	1.00	1.63	0.84	0.00	0.00	0.00	0.22	0.14	24.18	0.52	0.04	0.11	0.25	2.39	0.09	0.03	0.00	31.53	100.00
China	15.42	0.61	1.02	0.13	0.00	0.00	0.01	0.79	51.34	1.03	0.10	0.00	0.12	0.01	2.61	0.19	0.28	20.74	5.56	100.00
United States	27.66	21.70	7.54	6.72	0.00	0.00	0.00	2.19	0.49	6.09	2.05	2.16	0.47	2.09	1.47	0.86	0.35	0.02	18.14	100.00
France	29.91	31.07	16.33	1.47	0.00	0.00	0.00	3.09	0.08	0.59	0.70	2.37	0.44	0.52	1.49	1.91	2.76	0.03	7.26	100.00
Poland	7.69	18.64	16.81	0.93	0.00	0.00	0.00	20.79	0.15	0.06	0.24	13.37	0.45	0.06	0.24	0.84	0.03	0.00	19.71	100.00
Japan	35.10	0.42	0.31	1.74	0.00	0.00	0.00	0.24	3.86	2.40	1.15	0.07	0.10	0.21	3.83	0.10	0.00	0.10	50.37	100.00

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

Country	Dubai	Doha	Chennai	Moscow	Bangalore	Mumbai	London	Singapore	Kuala Lumpur	Delhi	Shanghai	Hyderabad	Istanbul	Sharja	Male	Abu Dhabi	Frankfurt	Muscat	Bangkok	Others	Total
India	690	131	11,468	0	5,334	4,617	25	121	129	2,663	7	2,825	2	144	105	29	52	132	166	1,699	30,339
Russian Federation	807	368	66	12,322	26	17	12	9	171	63	70	24	169	1,522	56	395	9	477	78	8,251	24,912
Germany	2,588	3,297	249	20	153	204	78	60	209	155	16	14	428	26	94	367	1,395	260	90	2,628	12,331
United Kingdom	1,895	2,071	376	0	132	126	3,334	141	268	124	14	53	37	61	122	130	5	64	123	2,450	11,526
Australia	157	79	123	0	48	57	52	2,255	633	186	10	35	3	9	80	10	1	12	65	4,085	7,900
China	131	46	15	1	2	4	5	128	316	7	3,057	4	0	8	146	14	0	9	230	2,550	6,673
United States	449	954	297	0	173	190	156	305	141	171	21	112	91	20	75	54	8	25	98	959	4,299
France	771	1,213	120	0	66	59	83	36	97	46	3	5	92	17	23	94	31	98	43	985	3,882
Poland	1,631	625	27	0	7	27	90	4	15	14	6	14	432	15	41	36	13	11	15	320	3,343
Japan	28	12	61	0	44	15	3	98	158	67	111	6	2	3	21	5	0	1	77	2,163	2,875



Research & International Relations Division

011 2426800 Ext. 151/155

research@srilanka.travel

www.sltda.gov.lk